

BOARDROOM BRIEF

Retail & Consumer *Vision 2030*

Ten structural signals leaders should watch, with a CEO playbook and three questions for your board.

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Vision 2030 lives in Horizon 3



The most effective executives separate three conversations, on purpose.

Vision 2030 is a capability, not a forecast.

H1

NEXT YEAR

Protect margin, stabilize operations, deliver commitments.

H2

TWO TO THREE YEARS

Scale new growth engines, enter adjacencies, build capabilities.

H3

THREE TO FIVE YEARS

Position for the structural forces already forming. The ten signals live here.

Resilience is engineered, not improvised

01 Regionalization is structural

Resilience has moved from contingency planning to operating-model redesign: parallel sourcing across regions, brand separated from fulfillment.

WHAT TO WATCH

Volume that depends on one country, supplier or site

02 Volatility is the baseline

Disruption is continuous, not surprising. The best teams shorten planning cycles and allocate capital by scenario.

WHAT TO WATCH

How often assumptions are challenged, not defended

\$300B

of US imports changed country of origin in 2025.

Source: Kearney, 2026 Reshoring Index

The journey travels with the customer

03 Consumers expect participation

Trust is fragile and visible. Shoppers want transparency on sourcing, pricing and data use, and a role in the brand.

WHAT TO WATCH

Brand health beyond transactions

04 Channels are dissolving, faster

Online versus offline is the wrong question. The journey travels with the customer across stores, digital, service and resale.

WHAT TO WATCH

Where demand starts, including AI assistants

Up to \$1T

of US retail revenue could be orchestrated by AI agents by 2030.

Source: McKinsey, The agentic commerce opportunity, 2025

Every asset is being repriced for risk

05 Sustainability is operational

Built into sourcing, pricing and design. Procurement is judged on emissions and supplier compliance, not only cost.

WHAT TO WATCH

Compliance exposure, market by market

06 Physical assets are being revalued

Stores and warehouses are valued for flexibility and risk, and are becoming media platforms, community anchors and last-mile hubs.

WHAT TO WATCH

What each store earns beyond sales per square foot

July 2026

Large companies may no longer destroy unsold clothing and footwear in the EU.

Source: EU Ecodesign for Sustainable Products Regulation

Speed without trust is a fragile strategy

07

Intelligent autonomy requires governance

AI now sets prices, stock and marketing. Name who is accountable for each algorithmic decision, and where human judgment stays.

WHAT TO WATCH

A named owner for every algorithmic decision

08

Brands must act as trust platforms

In volatile moments silence reads as indifference. Set decision principles in advance and tie incentives to long-term trust.

WHAT TO WATCH

Principles that exist before the next crisis

28%

of S&P 100 companies disclose both board-level AI oversight and a formal AI policy.

Source: Glass Lewis, February 2026

Build to pivot, not to predict

09

Organizations must become adaptive

Approval layers hide latency. Move authority closer to the market within clear guardrails; treat learning velocity as an asset.

WHAT TO WATCH

Time from a market signal to a decision

10

Strategy is a continuous loop

Strategy as a living system: write the assumptions down, revisit them, and build the organization to pivot.

WHAT TO WATCH

The date each assumption was last tested

Commit decisively, and design the organization to pivot when the signals shift.

Six moves for this planning cycle

01



Split the agenda into three horizons

Separate conversations, separate owners.

02



Stress-test concentration risk

Map sourcing, fulfillment and real estate by region.

03



Fund by scenario, review quarterly

Challenge assumptions; don't defend them.

04



Measure trust, not just transactions

Tie executive incentives to long-term trust.

05



Govern every algorithmic decision

A named owner, and a place for human judgment.

06



Move authority closer to the market

Clear guardrails; learning velocity as a measure.

Three questions to put to your leadership team

1

If our largest sourcing region were cut off next quarter, how long before our customers would notice?

WHAT IT TESTS

Whether resilience is engineered

2

Who is accountable when an algorithm makes a decision that costs us customer trust?

WHAT IT TESTS

Whether AI is governed

3

Which assumptions in our strategy have gone untested for more than a year?

WHAT IT TESTS

Whether strategy is a living system

READ THE FULL COLUMN

Retail And Consumer Vision 2030: 10 Structural Signals Leaders Should Watch

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