



Euromonitor
International

Digitally Native Brands: The Next Frontier of CPG Disruption

June 2025

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Direct-to-Consumer and S-Commerce provide fertile ground for Digitally Native Brands

Evolving ecosystem of the new online storefront gives rise to Digitally Native Brands

DIGITALLY NATIVE BRANDS RISE AS CHALLENGERS

Digitally Native Brands disrupt with unique propositions and compelling storytelling

Digitally Native Brands outperform in responding to emerging trends shaping the future

Social commerce and influencer economy lead to a new stream of brands

US leads the wave of Digitally Native Brands

DISRUPTION BY DIGITALLY NATIVE BRANDS SPANS ACROSS FMCG LANDSCAPE

Myprotein leads the protein supplements category via direct-to-consumer sales

IL MAKIAGE offers masterclass in harnessing success as digitally native beauty brand

MaryRuth's: From passion for plant-based nutrition to a supplement powerhouse

Trust and authentic storytelling led Honest to redefine baby and mother care products

Adopt A Cow's Tmall triumph proves dairy brands can thrive online

Liquid Death disrupts bottled water through a cult brand and social media virality

Harry's challenges legacy men's grooming brands through subscription innovation

Hello Bello delivers premium diapers for all, while fostering a community

nutpods scales to top coffee whitener rankings with an Amazon-focused approach

Ethical snacking and influencer marketing underpin Feastables' mass popularity

DISRUPTION BY DIGITALLY NATIVE BRANDS SPANS ACROSS FMCG LANDSCAPE

Neuro Gum merges functional supplements and snacks via subscription-driven strategy

DIGITALLY NATIVE BRANDS AS MAJOR GROWTH FRONTIER

Is there a billion-dollar digitally native brand?

Scaling with digitally native brands offers traditional players avenues for growth

Increased attractiveness has led FMCG leaders to hunt DNBs for strategic investments

The future of digitally native brands lies in omnichannel integration

CONCLUSION

Recommendations/opportunities for growth

An opportunity to reshape consumerism

What does greater digital convergence mean for the future of DNBs and CPG leaders?

Questions we are asking

APPENDIX

Appendix

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the

key markets, competitive environment and future outlook across a range of industries.

- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/digitally-native-brands-the-next-frontier-of-cpg-disruption/report.