



AgentRank

BY CONSENSYS 

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Market Intelligence Flash Report

Infant Formula · ASEAN



EXECUTIVE SUMMARY

Market Intelligence

Who AI recommends in ASEAN infant formula — leadership stability, challenger pressure, and the strategic priorities shaping the next phase of competition.

SCOPE

Infant Formula · ASEAN · 5 AI platforms

16.5%

S-26 AI SHARE

29.2%

NESTLÉ MFR SHARE

#1

S-26 CATEGORY RANK

4.0pp

LEAD OVER SIMILAC

MARKET STRUCTURE

S-26 leads an emerging challenger market

ASEAN infant formula is an **emerging challenger market**. S-26 holds **16.5%** AI recommendation share — a **4.0pp** lead over Similac (12.5%). Top-3 brands hold 40%, top-5 hold 54%. Leadership stability is **medium** and challenger pressure is **high**: the contest is still in play.

TOP BRANDS

Rank	Brand	AI Share
1	S-26	16.5%
2	Similac	12.5%
3	Enfamil	10.8%
4	Friso	8.6%
5	Nan	5.7%

TOP MANUFACTURERS

Rank	Manufacturer	Share
1	Nestlé	29.2%
2	Reckitt	24.3%
3	Danone	15.6%
4	Abbott	13.8%
5	FrieslandCampina	10.5%

MARKET CONCENTRATION

40%

TOP 3 BRAND SHARE

54%

TOP 5 BRAND SHARE

9

#1 RANKINGS (S-26)

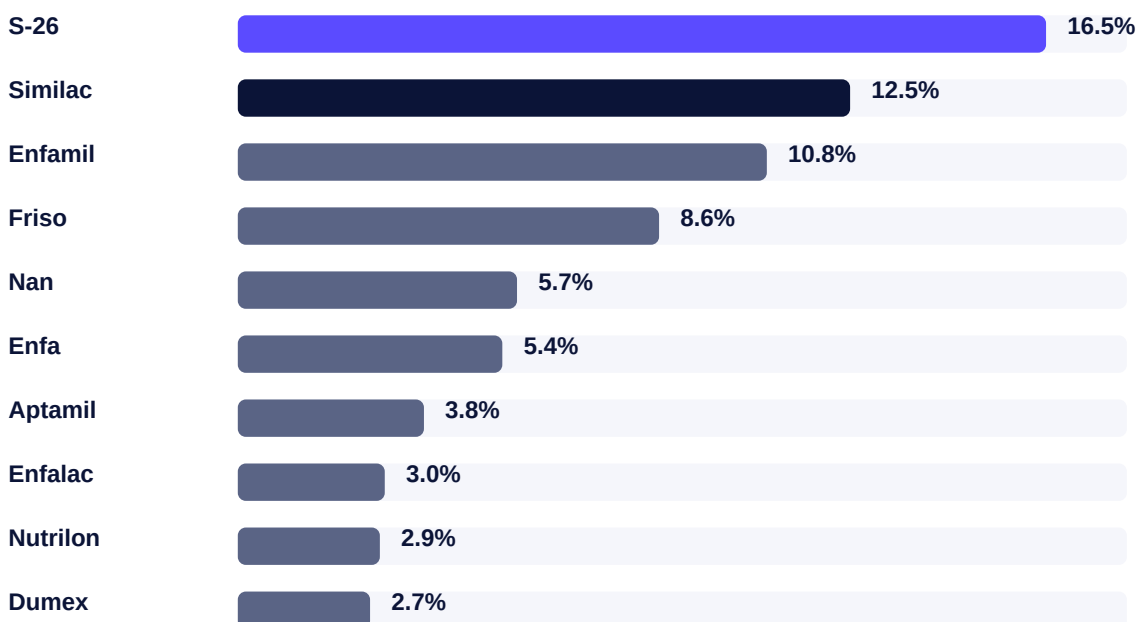
AI LEADERS

Recommendation share across 5 AI platforms

S-26 leads in share, but Enfamil and Friso show outsized recommendation power per observation. The leaderboard is moderately concentrated; positions 4–6 are within striking distance of one another.

AI recommendation share by brand

Share of recommendations across ChatGPT, Claude, Gemini, Grok, Deepseek



BRAND × AI HEATMAP

Each brand has a distinct platform signature

Index of strength per platform (100 = brand's average). S-26 wins on Claude, Gemini, and Deepseek; Similac and Enfamil dominate Grok; ChatGPT splits between Similac and Nan. Platform variance is the defining feature of this category.

Brand	AI Share	Obs.	ChatGPT	Claude	Deepseek	Gemini	Grok
S-26	16.5%	15	75	144	118	130	33
Similac	12.5%	16	135	46	n/a	98	122
Enfamil	10.8%	11	n/a	72	n/a	86	142
Friso	8.6%	10	47	117	129	n/a	108
Nan	5.7%	9	126	n/a	n/a	n/a	74
Enfa	5.4%	5	100	n/a	n/a	n/a	n/a

■ ≥130 Dominant
 ■ 110–129 Strong
 ■ 90–109 Average
 ■ 60–89 Weak
 ■ <60 Very weak
 ■ n/a Not present

STRATEGIC WINNERS

S-26 leads on every lens that matters

Four ways to read leadership: share, recommendation power per observation, average rank depth, and visibility-to-preference conversion. S-26 wins all four — Enfamil is the most credible challenger.

AI LEADERS

% share

1. S-26	16.5%
2. Similac	12.5%
3. Enfamil	10.8%
4. Friso	8.6%

RECOMMENDATION POWER

avg score

1. S-26	27.5
2. Enfamil	24.5
3. Friso	21.5
4. Similac	19.6

TRUST & AUTHORITY

avg rank (lower is better)

1. S-26	2.00
2. Enfamil	2.36
3. Friso	2.80
4. Similac	3.00

VISIBILITY VS PREFERENCE

win rate

1. S-26	60%
2. Enfamil	36%
3. Friso	20%
4. Similac	6%

CHALLENGER RADAR

Enfamil — 36% win rate at 10.8% share — is the only credible challenger to S-26.

COMPETITIVE BATTLEGROUND

Infant Formula cluster — a 4-brand contest

The Infant Formula cluster has one clear leader and three close pursuers. The gap from #1 to #4 is just 7.9pp — narrow enough that small shifts can reorder the leaderboard.

Cluster	Rank	Brand	Share
Infant Formula	1	S-26	16.5%
Infant Formula	2	Similac	12.5%
Infant Formula	3	Enfamil	10.8%
Infant Formula	4	Friso	8.6%

LEADERSHIP STABILITY & MARKET MOVEMENT

Emerging challenger market — leadership contest still in play

CURRENT STRUCTURE

**Emerging
challenger**

LEADERSHIP STABILITY

Medium

CHALLENGER PRESSURE

High

STRATEGIC READ

**Contest
in play**

“S-26 leads but does not dominate. With a 4.0pp gap to Similac and Enfamil rising on recommendation power, the next 6–12 months will decide whether the leader consolidates or concedes share.”

STRATEGIC PRIORITIES

Three priorities for the next quarter

01

Monitor narrow leadership gaps

Small shifts could change leadership where margins are thin (Infant Formula gap: 4.0pp). Track leaders and immediate challengers weekly.

02

Validate challenger momentum

Smaller brands are gaining recommendation strength — Enfamil's 36% win rate signals potential shifts. Apply minimum-volume thresholds before escalating directional signals.

03

Separate signal from noise

Low-volume brands (1–2 observations) can distort findings if treated as validated. Hold conclusions to a minimum base of 3+ observations and label confidence accordingly.

NEXT STEP

Explore the Infant Formula AgentRank workspace

See country-level AI share, platform variance, challenger momentum tracking, and a live recommendation evidence pack — across all ASEAN markets.

GET IN TOUCH

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SIGN UP FOR THE PLATFORM

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