PREDICTIONS REPORT

Predictions 2026: Digital Commerce

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Summary

Logistical challenges, operational costs, and generative experiences beyond their control will force digital leaders to embrace generative AI (genAI). Some options are out of reach for the majority of the market, and others are too immature to address the pain points. However, influencer marketing will reinvent itself with a new level of control, and B2B sales will face a massive shift from human to automated selling.

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Untenable Operational Costs Push Digital Commerce Into Generative Waters

2026 will be the year that genAI goes mainstream in digital commerce — for better and worse. GenAI has forever changed commerce and the tech behind it, but this is just the start of the new normal. The promise of profound efficiencies, new and seemingly natural experiences, and any leg up in a painfully competitive market makes generative promises endlessly attractive. Digital merchants also face mounting costs of goods, storage, and freight as human talent becomes harder to fund. Tech buying is trending toward consolidation and a reluctance to buy more than the most crucial functional requirements, while the demands of the market continue to require increasing tech investment.

These pressures funnel digital leaders toward the seemingly inevitable: generative interactions to replace human ones, AI-enhanced experiences, and vying for position in external genAI environments that are beyond their direct control. Digital merchants should weigh the risks of leaping ahead, lean on vendors to provide as much as possible rather than custom-building, and maintain an “experiment and adjust” mentality. In 2026, we predict that:

- **Five major US or European brands will unify agentic commerce experiences.** Unification is a perennial problem in commerce tech, forcing vendors now to rethink how they’re building and connecting the vital pieces of their ecosystem. As for brands, Nestlé already is developing its own conversational AI platform to combine shopping, promotions, and customer service in a single conversational experience, as it didn’t see vendors combining processes with ready-to-use components. A handful of powerhouse brands with similar resources and wherewithal will follow suit. The big struggle for brands in 2026 is interoperability as vendors launch isolated conversational agents that only pull from the data that each vendor houses. Even model context protocol (MCP) servers that unify agents and data are still served separately by each vendor.

These siloed genAI tools will create disjointed experiences for customers. For most of the market, custom development like this isn't possible. Watch for standalone platforms to emerge and stabilize. In the meantime, smooth customer experiences with handoffs between agents that are as seamless as possible, and test agentic/conversational apps for positive experiences.

- **One-third of retail marketplace projects will be deserted as answer engines steal traffic.** GenAI search experiences will curtail the recent explosive growth of online marketplaces. Answer engines like ChatGPT, Google Gemini, and Perplexity continue to expand their ability to transact, though the experience is still subpar. Initially, they'll attract more consumers' "eyeballs" as traditional website traffic decreases and composite retail growth stagnates. Even as retailers have launched online marketplaces for new streams of revenue and higher profitability, just a handful dominate global marketplace sales. In fact, 62% of US online adults say they can buy everything they need from Amazon. In other global regions, a single behemoth marketplace dominates sales (e.g., Mercado Libre in Latin America).

  Global digital merchants should reevaluate in-flight marketplace projects to ensure they'll deliver the expected value in the shadow of the behemoths. Reserve funds to mitigate falling traffic and monitor genAI chatbot selling and sponsorship opportunities as they unfold, but don't double down on agentic shopping experiences just yet: They are far from mature or widely adopted.

- **One influencer platform will introduce shopping within gated, generative conversations.** Approximately one-third of US (32%) and UK (35%) online adults who have heard of genAI have asked it questions about their personal lives. An existing platform will launch conversational experiences, pulling answers only from the creator's content. They will enable unprecedented control — both for content creators and end users. These models will replicate the content creators' vocal mannerisms, written style, and even common phrases. The first platform will be one with a loyal audience and a deep bank of content. Perhaps Twitch will lead, with videos that resemble creators' historical videos; maybe WhatsApp will launch chat channels with personalities' AI avatars. Interactions will be conversational, pseudo-authentic, and gated so the user feels like they're interacting directly with the trusted source.

  Influencers will feature products and services they endorse in the conversational experience, leaving users with ads but the belief that they're getting "advice" from their chosen source. Watch for new advertising and sponsorship opportunities in reimagined generative commerce experiences that embed checkout in the conversation — but require value from interactions.

- **The number of digital businesses that outsource fulfillment will triple to redirect funds.** Per Forrester's 2024 data, 20% of services decision-makers said they'd focus on inventory management and distribution in their work with third-party services providers in the next 12 months. We predict that number will triple in 2026. Why? Merchants operating their own replenishment-rich assortment simply isn't the strategic advantage it once was — and it gobbles budget. On-demand transportation and storage like Fulfillment By Amazon, ShipBob, Uber Freight, and independent third-party logistics providers (3PLs) are proliferating, so organizations instead can allocate more budget to content and experience. In addition to mitigating the vast cost of same- or next-day delivery, merchants will outsource to 3PLs: 1) for flexibility to better support rapid growth, seasonal spikes, and short product lifecycles that frustrate cost-effective logistics capacity planning; 2) to better manage high fulfillment costs at dedicated facilities; and 3) to support potentially lucrative geographic expansion using established 3PLs across borders.

  Brands focused on less predictable commerce should concede. Increasingly commoditized warehousing and transportation management are not differentiating retail competencies.

- **Twenty percent of B2B sellers will be forced to engage in agent-led quote negotiations.** Welcome to "Let's Make a Deal — AI Edition." In Forrester's B2B Sales Survey, 2024, 37% of sales professionals said that a top revenue growth challenge was being slow to recognize and adapt to buying behaviors. This year, 61% of purchase influencers say their organization has or will use a private genAI engine to support purchasing. In 2026, we predict that at least one in five B2B sellers will be compelled to respond to AI-powered buyer agents with dynamically delivered counteroffers via seller-controlled agents. Buyers' procurement teams are developing agents to aggressively negotiate discounts, payment terms, and service levels. These agents are tireless, data-driven, and capable of scaling negotiation across hundreds of suppliers simultaneously — and ensuring compliance with regulations and entitlements. Static pricing pages and rigid checkout flows will give way to agent-compatible negotiation interfaces.

  To compete, suppliers must deploy agents to field quotes and counteroffers, prioritizing margin, compliance, and positioning. In-house AI engineers and strong partners will rule.

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