

FORECAST REPORT

# US Retail E-Commerce Forecast, 2025 To 2030

January 23, 2026

By Jitender Miglani with Fiona Swerdlow, Michael O'Grady, Elizabeth Beckett

FORRESTER

## Summary

Forrester expects steady expansion of US retail sales over the next five years. By 2030, we project that US total retail sales will reach \$6.2 trillion, up from \$5.2 trillion in 2025. US e-commerce sales will reach \$1.8 trillion, and US e-commerce penetration will grow to 29% by 2030. This report provides a forecast for US total retail sales, e-commerce sales, and e-commerce penetration for 30 product categories, with historical data going back to 1998.

Additional resources are available in the [online version](#) of this report.

# US Retail And E-Commerce Sales Will See Steady Expansion

Despite tariff-related uncertainty early in 2025, US retail sales remained [resilient](#), supported by strong consumer demand and preemptive buying. With inflation and interest rates stable, historically low unemployment, and [wages outpacing inflation](#), US retail sales overall are set for steady growth.

However, spending patterns are diverging across income groups. [Research](#) from Bank of America shows that total retail growth is driven by higher-income households benefiting from stock market gains and rising home equity, which boosts confidence and spending. By contrast, lower-income households remain focused on essentials. Per [Forrester's Financial Services Banking Survey, 2025](#), 32% of US online adults with annual household incomes under \$50,000 mention that they struggle with paying for basic living expenses, compared with 11% of those with a household income of \$100,000 or higher.

As a result, sales from [warehouse clubs](#), off-price retailers, and [discount stores](#) are growing, and [private-label sales](#) in the US reached a record high of \$271 billion in 2024. Per [Forrester's June 2025 Consumer Pulse Survey](#), 89% of US online adults bought private-label or store-brand goods in the prior three months, and 53% were buying more than they did a year earlier.

## E-Commerce Sales Will Grow More Than Twice As Fast As Total Retail Sales

US total retail sales (excluding automotive and gasoline sales) will grow from \$5.2 trillion in 2025 to \$6.2 trillion in 2030 at a five-year compound annual growth rate (CAGR) of 3.7%. The store drives most retail sales: In 2030, 71% of retail sales will come from stores, capturing \$4.4 trillion (see Figure 1).

US e-commerce sales will grow from \$1.2 trillion in 2025 to \$1.8 trillion in 2030, with a five-year CAGR of 7.8%. By 2030, US e-commerce penetration (which is the percentage of e-commerce sales out of total retail sales) will reach 29%, up from 24% in 2025.

E-commerce growth will result from demographic shifts as more [Gen Z consumers](#) enter the workforce, from [logistics improvements](#) that enable faster and more reliable fulfillment, and from technology innovations like [agentic commerce](#). Retailer strategies like curated marketplaces (e.g., [Best Buy](#), [Lowe's](#), [Ulta Beauty](#)) will enhance product selection and capitalize on monetization opportunities with [retail media](#).

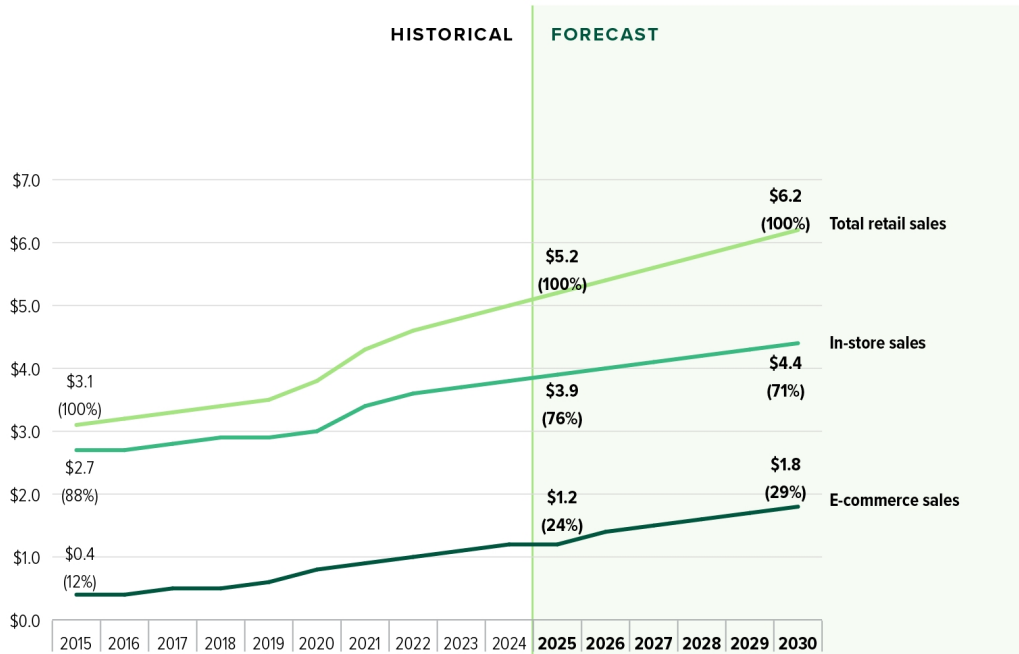
**US Retail E-Commerce Forecast, 2025 To 2030**

Forrester Report Copy Prepared Exclusively For Clara D'Silva With Korcomptenz Inc.. Distribution and reproduction are prohibited. For more information, see the [Terms Of Use Policy](#) and [Ways To Share Research](#).

**Figure 1**

**US Retail Sales From 2015 To 2030 — E-Commerce, In-Store, And Total**

US retail sales (US\$ trillions)



Forrester Forecast

**Note:** The share of the total retail sales is provided in the parentheses.  
**Source:** Forrester’s US Retail E-Commerce Forecast, 2025 To 2030

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

**Nondurable Goods Will Have A Larger Share, While Durable Goods Will Gain Momentum**

Nondurable goods, or soft goods, are products with a lifespan of less than three years, such as clothing, food, medical supplies, personal care items, and pet products. These categories will continue to dominate retail sales. Food and beverages will remain the largest category, reaching \$1.5 trillion in US retail sales by 2030, followed by clothing at nearly \$500 billion (see Figure 2). To capture price-conscious shoppers, large retailers like [Albertsons](#), [Amazon](#), [Costco](#), and [Walmart](#) are expanding their private-label grocery offerings.

## US Retail E-Commerce Forecast, 2025 To 2030

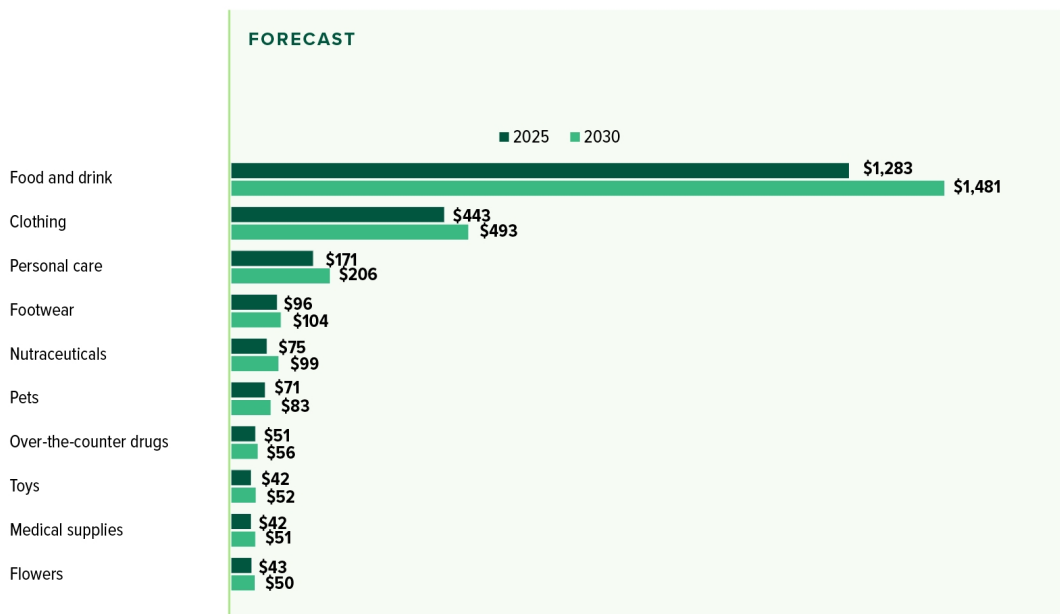
Forrester Report Copy Prepared Exclusively For Clara D'Silva With Korcomptenz Inc.. Distribution and reproduction are prohibited. For more information, see the [Terms Of Use Policy](#) and [Ways To Share Research](#).

Durable goods are products with a lifespan of three years or more, such as appliances, electronics, furniture, jewelry and watches, and sporting equipment. Tools and home improvement and consumer electronics are the largest and fastest-growing durable good categories. [Electronics](#) sales will benefit from AI-enabled features catalyzing multiyear device upgrade waves, while [home improvement](#) gains momentum as aging housing stock and homeowner equity drive remodeling. A gradual housing market recovery supports optimism for [furniture and appliance sales](#). [Auto parts](#) will outperform as the average vehicle age reaches 12.8 years, boosting aftermarket demand.

**Figure 2**

### US Total Retail Sales For Durable And Nondurable Categories

Total retail sales (US\$ billions) — nondurables



Forrester Forecast

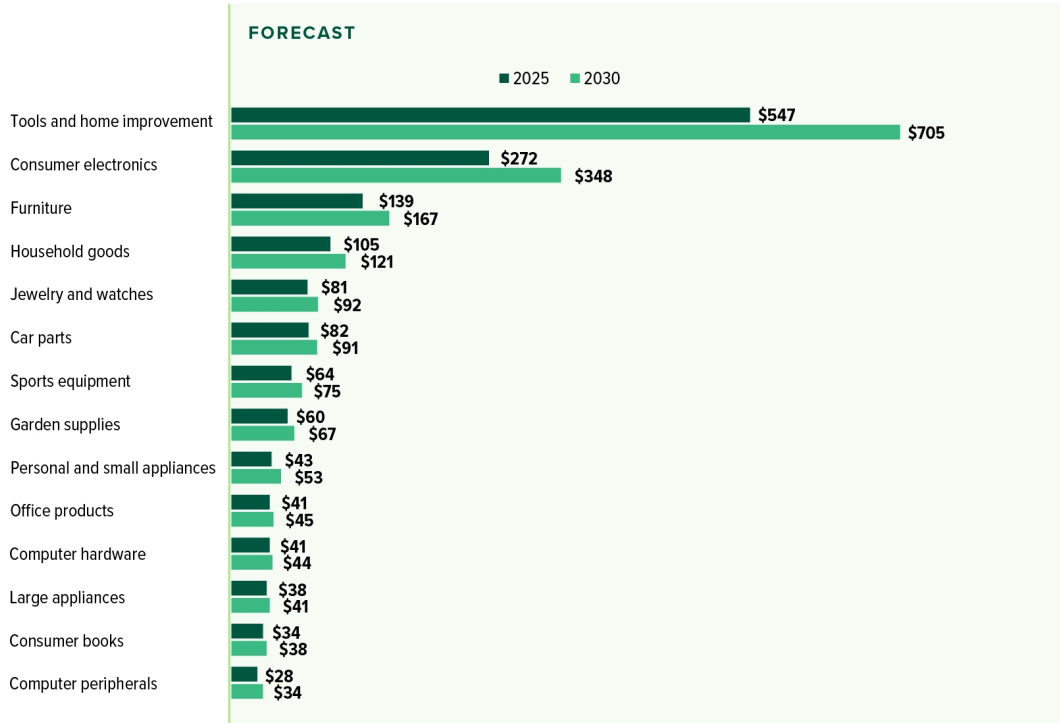
Source: Forrester's US Retail E-Commerce Forecast, 2025 To 2030

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## US Retail E-Commerce Forecast, 2025 To 2030

Forrester Report Copy Prepared Exclusively For Clara D'Silva With Korcomptenz Inc.. Distribution and reproduction are prohibited. For more information, see the [Terms Of Use Policy](#) and [Ways To Share Research](#).

### Total retail sales (US\$ billions) – durables



Forrester Forecast

Source: Forrester's US Retail E-Commerce Forecast, 2025 To 2030

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## Nondurable Goods E-Commerce Sales Will Grow Faster Than Durable Goods

Nondurable goods categories have significant e-commerce potential and will see double-digit or high-single-digit growth over the next five years. Clothing will remain the biggest category, followed by online grocery, which will grow in the double digits (see Figure 3). Amazon reported **\$100 billion** in gross sales of groceries and household essentials sales in 2024. Despite the closure of the **de minimis loophole**, China-based platforms such as Temu, TikTok Shop, and SHEIN will continue to grow by adapting their business models through strategies like establishing local warehouses, partnering with domestic sellers, and diversifying supply chains to reduce tariff exposure and maintain competitive pricing. **Pet care** remains a growing category, driven by personalization, prescription integration, and auto-replenishment models that minimize stockouts.

## US Retail E-Commerce Forecast, 2025 To 2030

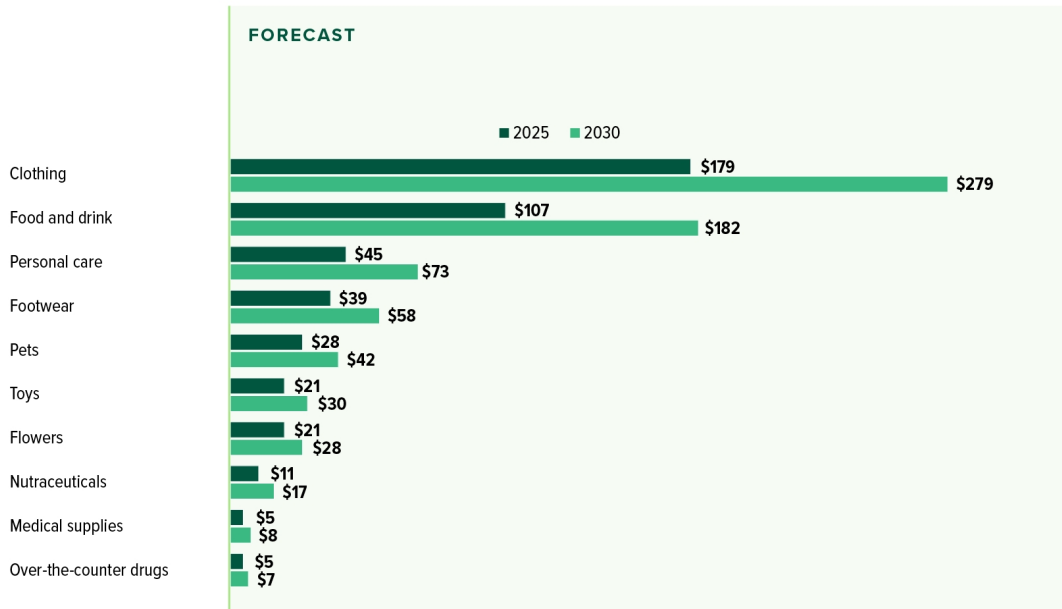
Forrester Report Copy Prepared Exclusively For Clara D'Silva With Korcomptenz Inc.. Distribution and reproduction are prohibited. For more information, see the [Terms Of Use Policy](#) and [Ways To Share Research](#).

In contrast, about half of the durable goods categories will see mid- to high-single-digit e-commerce growth over the same period. The tools and home improvement segment will grow faster, with projected double-digit e-commerce growth, and will exceed \$100 billion in e-commerce sales by 2030. The Congressional Budget Office (CBO) expects the inflationary [impact of tariffs](#) to be temporary, with price pressures easing and inflation returning to baseline levels by 2026.

### Figure 3

#### US E-Commerce Sales For Durable And Nondurable Categories

##### E-commerce sales (US\$ billions) – nondurables



Forrester Forecast

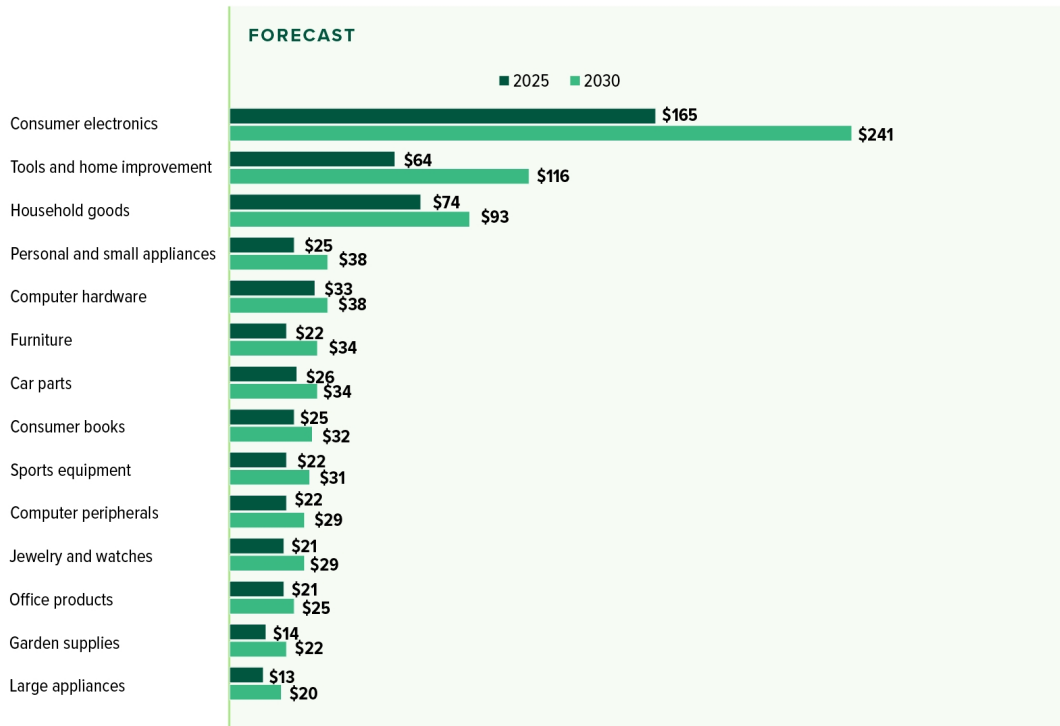
Source: Forrester's US Retail E-Commerce Forecast, 2025 To 2030

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## US Retail E-Commerce Forecast, 2025 To 2030

Forrester Report Copy Prepared Exclusively For Clara D'Silva With Korcomptenz Inc.. Distribution and reproduction are prohibited. For more information, see the [Terms Of Use Policy](#) and [Ways To Share Research](#).

### E-commerce sales (US\$ billions) — durables



Forrester Forecast

Source: Forrester's US Retail E-Commerce Forecast, 2025 To 2030

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## Faster E-Commerce Growth Will Increase E-Commerce Penetration Across Categories

Per [Forrester's Retail Topic Insights 1 Survey, 2025](#), the top five reasons why US online adults shop online are: free shipping (41%), price/deals/offers available online (40%), ease and convenience of online shopping (39%), ease of finding the exact product (35%), and the flexibility to buy wherever or whenever (35%). These factors will remain the key growth drivers for online shopping and help increase e-commerce penetration across categories.

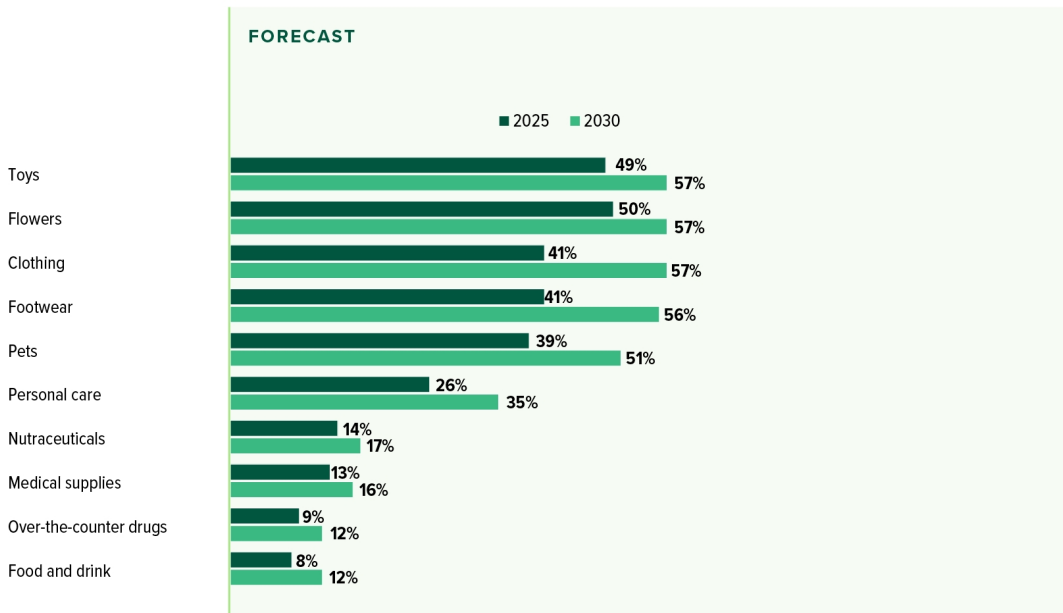
Aggregate e-commerce penetration for nondurable goods is only about half that of durable goods categories. By 2030, e-commerce penetration for clothing, flowers, footwear, pets, and toys will exceed 50% (see Figure 4).

Half of the durable goods categories already have e-commerce penetration above 50%, and by 2030, penetration of computer hardware, peripherals, and consumer

books will exceed 80%. As penetration reaches higher levels, the total growth will align with the pace of e-commerce growth within these categories.

**Figure 4**  
**US E-Commerce Penetration For Durable And Nondurable Categories**

**E-commerce penetration — nondurables**



**Forrester Forecast**

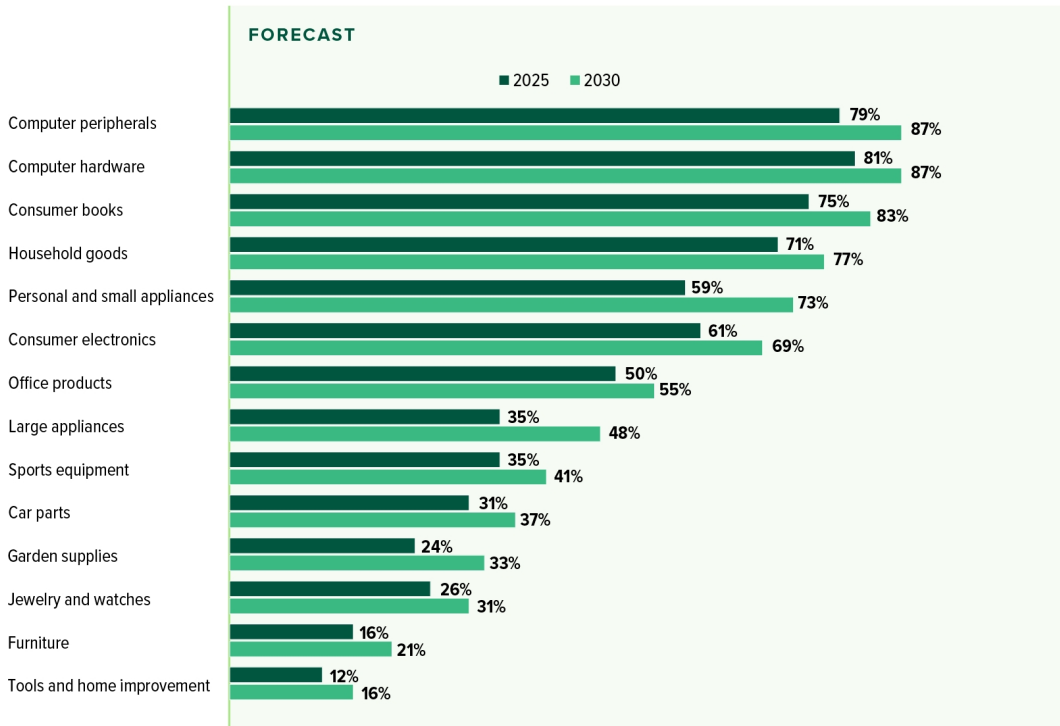
**Source:** Forrester's US Retail E-Commerce Forecast, 2025 To 2030

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## US Retail E-Commerce Forecast, 2025 To 2030

Forrester Report Copy Prepared Exclusively For Clara D'Silva With Korcomptenz Inc.. Distribution and reproduction are prohibited. For more information, see the [Terms Of Use Policy](#) and [Ways To Share Research](#).

### E-commerce penetration — durables



Forrester Forecast

Source: Forrester's US Retail E-Commerce Forecast, 2025 To 2030

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## Click-And-Collect Sales Help Boost Omnichannel Retailers' E-Commerce Sales

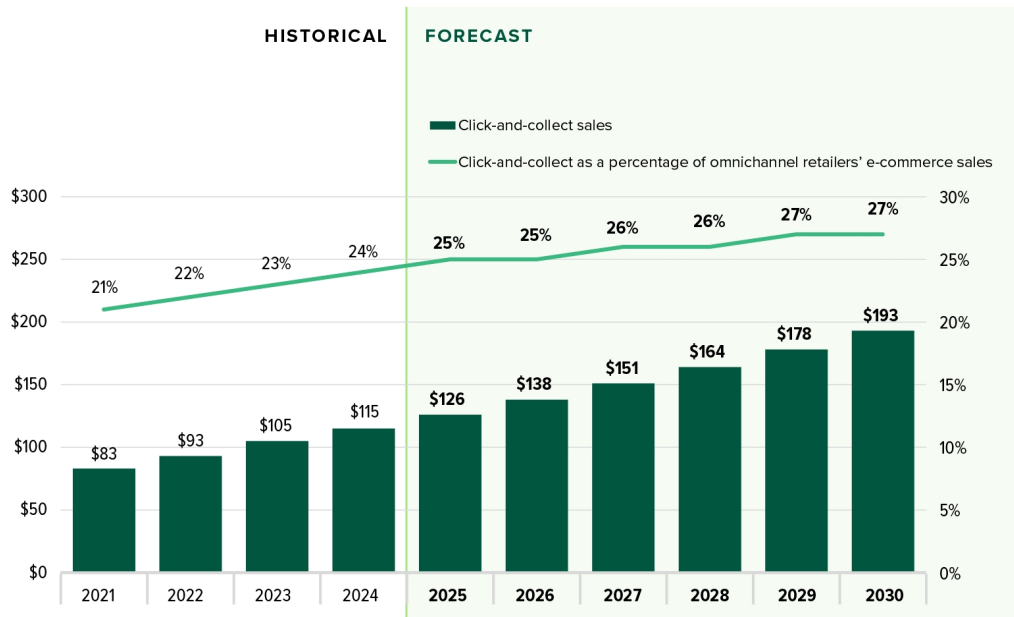
By 2030, US click-and-collect sales will reach \$193 billion and capture 27% of US omnichannel retailers' e-commerce sales (see Figure 5). Click-and-collect retail sales, which include both "buy online, pick up in-store" (BOPIS) and curbside pickup, are considered part of e-commerce sales.

Per [Forrester's Retail Topic Insights 1 Survey, 2025](#), the top five reasons for US online adults to use BOPIS/click-and-collect options are: avoiding delivery costs (40%), avoiding waiting for delivery (39%), avoiding spending time finding the item in the store (37%), avoiding a wasted trip to the store by ensuring the product is available for pickup (33%), and the convenience of collecting from the store (25%).

From a retailer’s perspective, click-and-collect offers a cost-effective solution for order fulfillment and provides an opportunity to foster strong customer relationships.

**Figure 5**  
**US Click-And-Collect Retail Sales And Share Of E-Commerce, 2021 To 2030**

US click-and-collect sales (US\$ billions)



Forrester Forecast

Source: Forrester’s US Retail E-Commerce Forecast, 2025 To 2030

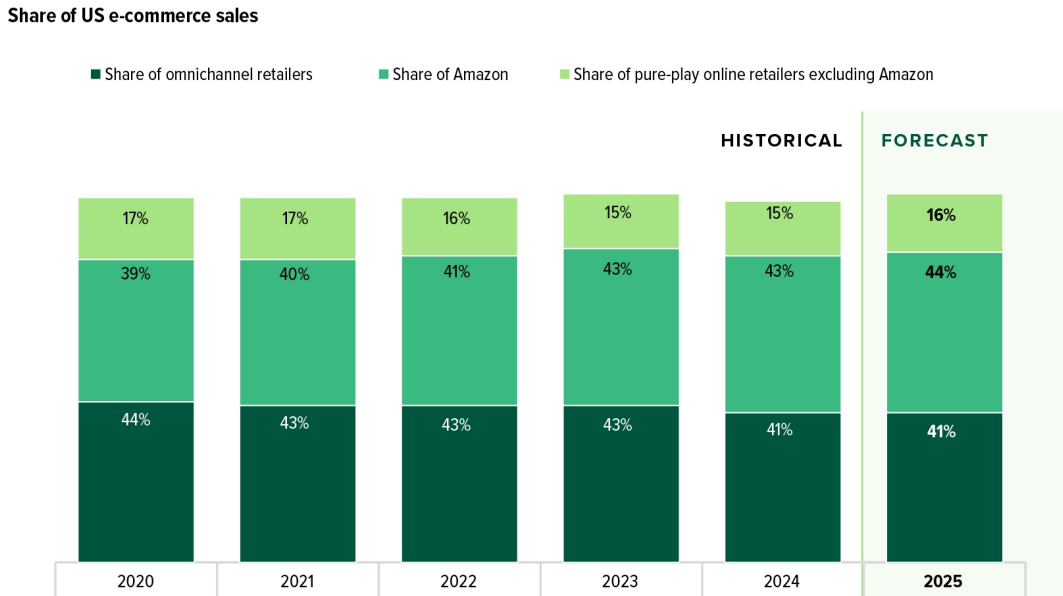
Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## Retailers Must Invest In Seamless Omnichannel And Exceptional In-Store Experiences

Dominated by Amazon, pure-play online retailers continue to gain a larger share of the US e-commerce market (see Figure 6). Amazon alone generated more e-commerce sales (\$502 billion) than the combined e-commerce sales of all omnichannel retailers in the US in 2024 (\$478 billion). To compete effectively, omnichannel retailers must invest in creating seamless [customer experiences](#) across digital selling channels and deliver exceptional [in-store experiences](#).

Per [Forrester's Priorities Survey, 2025](#), the top five selected retailer initiatives center on enhancing the in-store experience through technology, highlighting the continued importance of physical stores. Their top priority is empowering store associates to better serve customers, followed by improving customer self-service solutions for greater convenience. Retailers are also prioritizing initiatives to strengthen omnichannel capabilities to provide deeper inventory visibility and broader product selection, as well as to prevent shoplifting and theft to ensure a secure shopping environment (see Figure 7).

**Figure 6**  
Pure-Play Online And Omnichannel Retailers' Share Of US E-Commerce Sales



Forrester Forecast

**Note:** Percentages may not total 100 because of rounding.

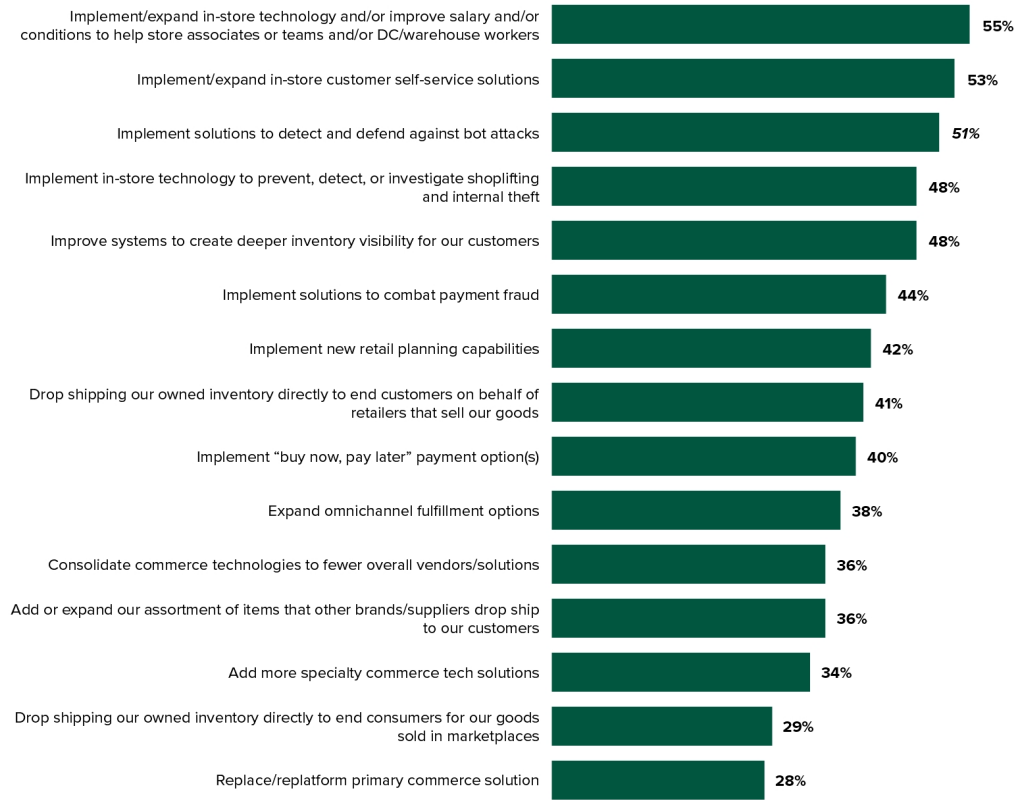
**Source:** Forrester's US Retail E-Commerce Forecast, 2025 To 2030; Forrester analysis

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

**Figure 7**

**Retailers Plan To Invest In Seamless Omnichannel Experiences**

**"Which of the following retail initiatives will your organization invest the most in over the next 12 months?"**  
(Select up to seven)



Base: 129 US business and technology professionals working in retail  
Source: Forrester's Priorities Survey, 2025

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

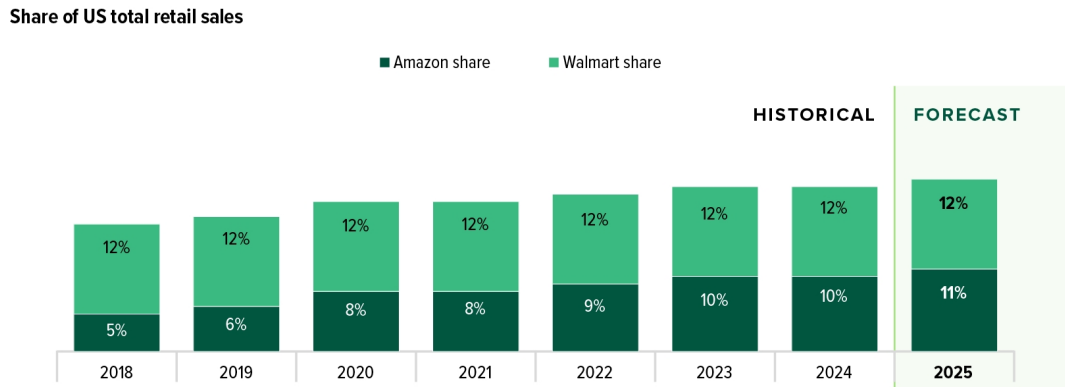
**Amazon And Walmart Dominate US Retail Sales**

Amazon and Walmart significantly increased their share of total retail and e-commerce sales in the US over the past seven years (see Figure 8). If the current trends continue, we forecast that Amazon and Walmart will jointly account for 27% of total retail sales (\$1.7 trillion) and 70% of e-commerce sales (\$1.3 trillion) in the US by 2030. Both companies invest in [agentic AI](#), [supply chain transformation](#), and growing alternative sources of revenues such as [retail media](#). And their market dominance has attracted regulatory attention from entities such as the [Federal Trade Commission \(FTC\)](#).

However, this dominance will make it challenging for smaller retailers to gain market share without significant differentiation in terms of service, assortment, and store experience.

**Figure 8**

**Amazon And Walmart's Share Of US Total Retail And E-Commerce Sales**



Forrester Forecast

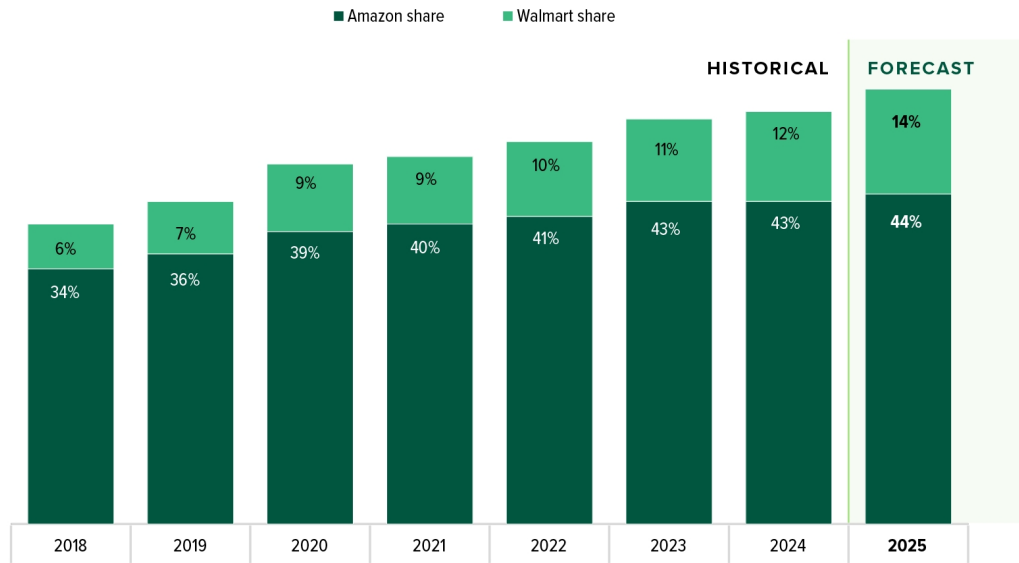
Source: Forrester's US Retail E-Commerce Forecast, 2025 To 2030; Forrester analysis

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## US Retail E-Commerce Forecast, 2025 To 2030

Forrester Report Copy Prepared Exclusively For Clara D'Silva With Korcomptenz Inc.. Distribution and reproduction are prohibited. For more information, see the [Terms Of Use Policy](#) and [Ways To Share Research](#).

Share of US e-commerce sales



Forrester Forecast

Source: Forrester's US Retail E-Commerce Forecast, 2025 To 2030; Forrester analysis

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

# Supplemental Material

## The Forecast Methodology

Forrester's forecasts offer a quantitative framework for understanding market drivers and inhibitors across several industries to help clients plan and prioritize investment decisions. Our forecasts employ a unique methodology: By leveraging demand-side data balanced with company supply-side metrics and working closely with Forrester's subject matter experts, we provide a highly detailed understanding of each market.

As part of the forecast modeling, Forrester develops comprehensive historical and base-year market size estimates based on a variety of sources, including government datasets, public companies' financial documents, executive interviews, Forrester's proprietary primary research and surveys, and analysis of the internet traffic database.

All of Forrester's forecasts are designed by a dedicated team of forecasting analysts who build the models, conduct extensive industry research, and manage the process of formally building consensus among Forrester's analysts. Forecast analysts have backgrounds in investment banking, management consulting, and market research, where they developed extensive experience with industry and company forecasting.

## **Data Included**

The report includes an accompanying Excel spreadsheet that provides US total retail sales, e-commerce sales, e-commerce penetration, and online buyer population data for 30 retail categories. The Category Definitions sheet details the items included in each category. The data starts from 1998, and the data from 2025 to 2030 is Forrester's forecast. The report also provides data for US click-and-collect retail sales and e-commerce sales of pure-play online retailers and omnichannel retailers.

In this report, the categories are broadly classified into two groups: nondurable goods categories and durable goods categories. Nondurable goods, also known as soft goods, are products with an expected lifespan of less than three years, whereas durable goods are products with an expected lifespan of three years or more. The purpose of this grouping is to simplify the analysis and the presentation.

Nondurable goods categories include clothing, flowers, food and drink, footwear, medical supplies, nutraceuticals, over-the-counter drugs, personal care, pets, and toys.

Durable goods categories include car parts, computer hardware, computer peripherals, consumer books, consumer electronics, furniture, garden supplies, household goods, jewelry and watches, large appliances, office products, personal and small appliances, sports equipment, and tools and home improvement.

The Excel spreadsheet also includes data for highly digitally penetrated discretionary categories such as computer software, music, video and DVDs, and video games. The sales in these categories are dominated by technology companies rather than retail companies. Movie tickets and event tickets sales data is also included.



# We help business and technology leaders use customer obsession to accelerate growth.

**FORRESTER.COM**

## Obsessed With Customer Obsession

At Forrester, customer obsession is at the core of everything we do. We're on your side and by your side to help you become more customer obsessed.

---

### Research

Accelerate your impact on the market with a proven path to growth.

- Customer and market dynamics
- Curated tools and frameworks
- Objective advice
- Hands-on guidance

[Learn more.](#)

### Consulting

Implement modern strategies that align and empower teams.

- In-depth strategic projects
- Webinars, speeches, and workshops
- Custom content

[Learn more.](#)

### Events

Develop fresh perspectives, draw inspiration from leaders, and network with peers.

- Thought leadership, frameworks, and models
- One-on-ones with peers and analysts
- In-person and virtual experiences

[Learn more.](#)

## Contact Us

Contact Forrester at [www.forrester.com/contactus](http://www.forrester.com/contactus). For information on hard-copy or electronic reprints, please contact your Account Team or [reprints@forrester.com](mailto:reprints@forrester.com). We offer quantity discounts and special pricing for academic and nonprofit institutions.

Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA  
Tel: +1 617-613-6000 | Fax: +1 617-613-5000 | [forrester.com](http://forrester.com)