

The agentic commerce readiness gap

Why many retail organizations aren't fully prepared for agentic commerce — and how marketplace leaders are closing the gap.

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Executive Summary

01

Agentic commerce is here. Most enterprises aren't ready. Here's what the data shows.

The market shift

The market shift to agentic commerce is happening right before our eyes, and it's redefining how people discover, evaluate and buy products.

Today, six out of 10 consumers already use AI while shopping, and Boston Consulting Group projects that 55% of U.S. eCommerce spending will soon be agent-assisted. At the same time, industry analysis shows that organic traffic in 2025 declined 10% year over year as search queries became longer and more contextual.

But even as agentic commerce gains traction, consumer expectations are evolving faster than enterprises can keep pace.

55%

of U.S. eCommerce spending will soon be **agent-assisted** (BCG)

31%

GMV growth for **marketplace and dropship platforms** in 2025 YoY

1. University of Virginia, Nearly 60% Use AI to Shop — Here's What That Means for Brands and Buyers, 2025, <https://news.darden.virginia.edu/2025/06/17/nearly-60-use-ai-to-shop-heres-what-that-means-for-brands-and-buyers/>
2. BCG, Agentic Commerce Shopping and Payments Re-(AI)maged, 2025, <https://media-publications.bcg.com/Agentic-Commerce.pdf>
3. The Digital Bloom, 2025 Organic Traffic Crisis: Zero-Click & AI Impact Analysis Report, 2025, <https://thedigitalbloom.com/learn/2025-organic-traffic-crisis-analysis-report/>

Merkle research: The readiness crisis

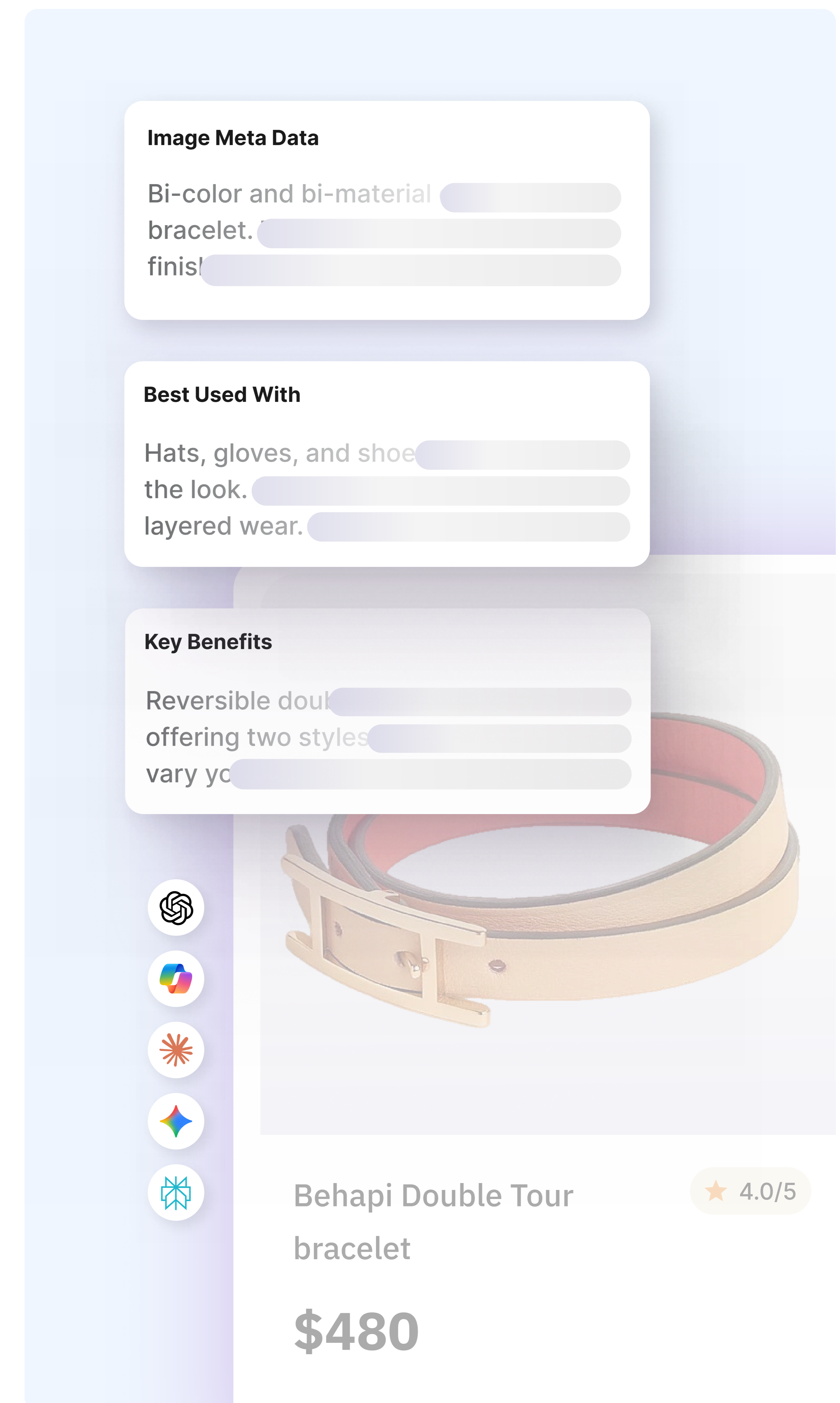
New research from experience transformation consultancy Merkle reveals an AI readiness crisis inside large organizations. In the company's study of 100 executives, 72% struggle with unclear success metrics or ROI, 98% have insufficient training and enablement and 64% cite competing transformation initiatives as their biggest barrier.

The study also showed that nearly half of enterprises remain in early or developing stages of marketing and customer experience technology maturity, creating a gap between the AI features customers expect and what brands can deliver.

What this report covers

Yet, the data also points to a path forward. Analysis from Mirakl demonstrates that, in 2025, marketplace and dropship platforms achieved 31% gross merchandise value (GMV) growth year over year — nearly 4.5 times the rate of traditional eCommerce. Marketplace platforms are unique in that they address both sides of the challenge: rising consumer expectations and internal constraints on deploying agentic commerce tools.

This comprehensive report combines Merkle and Mirakl's research and insights to assess agentic commerce readiness and outlines how organizations can align technology and strategy to close the gaps.



1. Merkle, Organizational Readiness: The Missing Piece in Tech Transformation, 2026, <https://www.merkle.com/en/merkle-now/articles-blogs/2026/organizational-readiness-missing-piece-tech-transformation.html>

55%

of U.S. eCommerce spending will soon be agent-assisted

Consumer adoption of AI shopping is accelerating while most enterprises remain unprepared. Marketplace platforms — growing at 31% GMV YoY — are uniquely positioned to bridge both sides of the gap.

6/10

consumers already use AI while shopping

10%

decline in organic traffic in 2025 year over year

31%

GMV growth on marketplace and dropship platforms in 2025

02

Chapter

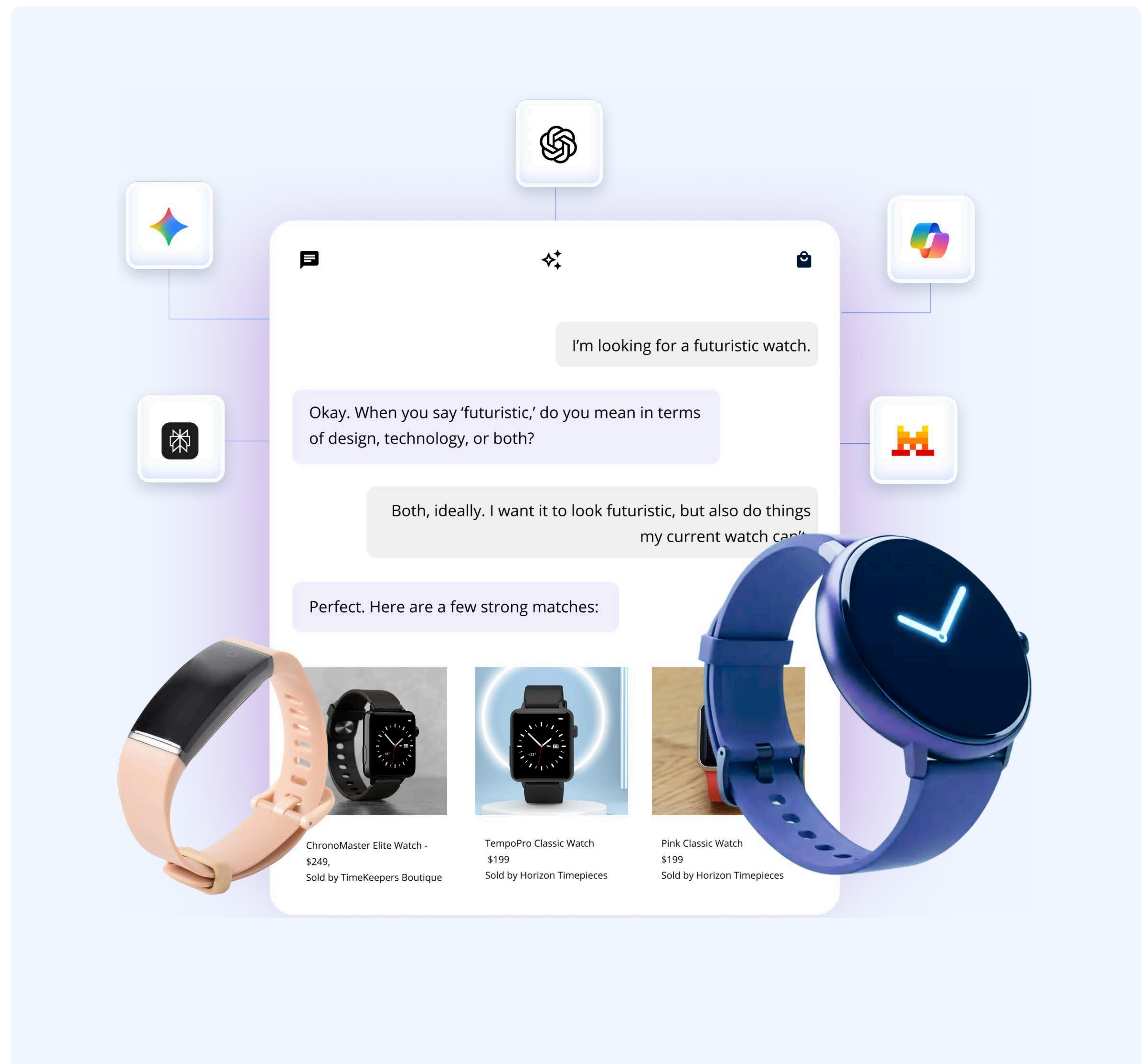
The Agentic Commerce Revolution

AI agents are becoming the new shopper. Understanding how they work is the first step to competing in their world.

What is agentic commerce?

Agentic commerce is a form of digital commerce in which AI agents act on behalf of consumers, managing product discovery, comparison, purchasing and post-purchase activities based on a user's goals, preferences and constraints.

This model moves decision-making away from human-driven browsing and toward AI systems that evaluate options and often enable transactions directly within the chat experience.



Three stages of digital commerce

1.0

LATE 1990S–2000S

Digital storefront era

Retail moved from physical-only to online channels.

Websites functioned as static digital catalogs.

Core features: Shopping carts, checkout and brand-owned storefronts.

2.0

2010S–EARLY 2020S

Platform and omnichannel era

Marketplaces like Amazon and Walmart redefined product discovery.

Retailers integrated online and offline experiences.

Core features: Seamless integration between in-store, web and mobile — BOPIS.

3.0

NOW EMERGING

Agentic commerce era

Shift from AI-based search to intent-driven, conversational discovery.

Agents scan options, compare products and complete transactions.

Core features: Assisted discovery, autonomous purchasing, agent-to-agent commerce.

OFF-SITE MODEL

Reach new customers through third-party AI

With an off-site model, third-party assistants such as ChatGPT or Perplexity evaluate products from multiple retailers and direct users to purchase. The transaction occurs entirely off the merchant's website. The main purpose of off-site agentic commerce is to reach new customers in high-intent environments and complete purchases through third-party platforms.

Reach new customers in high-intent environments and complete purchases through third-party platforms.

ON-SITE MODEL

Increase conversion with retailer-owned AI

With an on-site model, retailer-owned AI assistants are embedded into merchant websites or apps to handle service, discovery and checkout within the brand environment. The main purpose of on-site agentic commerce is to increase average order value (AOV) and conversion rates for existing traffic.

Increase average order value (AOV) and conversion rates for existing traffic.

From discovery to agent-to-agent commerce

01

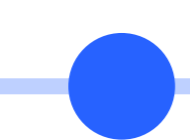


NOW

Discovery

LLMs compare options and provide purchase links.

02

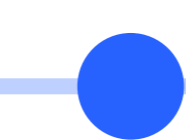


EMERGING

Purchase

AI supports purchases inside chats and outside of retailer sites.

03

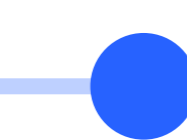


NEAR FUTURE

Autonomous

AI manages most shopping decisions with minimal human input.

04



FUTURE

Agent-to-Agent

AI systems transact with each other with almost no human input.

The market reality

For the first time, AI systems, not humans, are the decision-makers in shopping. Brands must serve not just shoppers, but the AI agents that shop for them.

Most organizations follow a similar path: investment surges, pilots proliferate, and results disappoint because foundational work lags. Retailers have long been told to get their data in order, but the penalty is far higher in an agentic world, where agents act autonomously and at speed, making a real-time, complete picture of your customer, inventory and operations essential.

Consumer adoption signals:

- In the first three months of 2026 (Jan. to Mar. 2026), traffic from AI sources to U.S. retail sites grew 393% year over year (YoY).
- Nearly half of consumers report trusting AI more than a friend for shopping advice.

The impact on traditional search:

- Organic traffic is declining: As consumers start shopping journeys inside AI interfaces, fewer users click through organic search listings.
- The move from keywords to contextual prompts: Queries such as "best running shoes under \$150 with good arch support" prioritize relevance and contextual understanding over keywords.
- Rising confidence in AI recommendations: Consumers are twice as likely to trust AI over family and friends for shopping recommendations.

393%

increase in
traffic from AI
sources to U.S.
retail sites YoY

2x

more likely
consumers are
to trust AI over
family and friends
for shopping advice

1. Adobe, **Adobe Digital Insights: GenAI Traffic Update, 2026**, <https://experienceleague.adobe.com/en/docs/events/adobe-customer-success-webinar-recordings/2026/general2026/gen-ai-traffic-update>

2. University of Virginia, **Nearly 60% Use AI to Shop – Here's What That Means for Brands and Buyers, 2025**, <https://news.darden.virginia.edu/2025/06/17/nearly-60-use-ai-to-shop-heres-what-that-means-for-brands-and-buyers/>

3. Conveo, **Consumers are twice as likely to trust AI over family and friends for recommendations, finds new study by Conveo, 2025**, <https://conveo.ai/insights/press-release-consumers-are-twice-as-likely-to-trust-ai-over-family-and-friends-for-recommendations-finds-new-study-by-conveo>

03

Chapter

The Dual Readiness Challenge

Consumers are moving fast. Enterprises are falling behind. The gap between them is the core challenge.

Consumer expectations

Consumer interest in AI-assisted shopping is growing, with strong signals in both ChatGPT usage and trust in AI recommendations. Yet enterprises are slow to evolve with this momentum.

As consumers favor AI-enabled, personalized and frictionless commerce, challenges persist for brands, according to a Merkle study surveying 2,500 consumers worldwide.

The screenshot shows a user interface for an AI-powered product recommendation system. At the top, there is a search bar with the query "What's the best espresso machine under \$500". Below the search bar, a colorful starburst icon indicates a recommendation. The main content area displays three product cards. The first card, which is the largest, features a Breville Bambino Plus Espresso Machine with a price of \$499 and an "Add to cart" button. The second card shows a De'Longhi DedicArte Espresso Machine for \$299. The third card shows a Gaggia Classic Pro E24 Espresso Machine for \$499. Each card includes a product image, the product name, price, and an "Add to cart" button.

What's the best espresso machine under \$500

For under \$500, the **De'Longhi DedicArte** (\$299) is a top pick — slim, stylish, and makes rich, authentic espresso. If you want to step it up, the **Breville Bambino Plus** (\$499) adds automatic milk frothing for café-quality lattes at home. Both ships with a 2-year warranty.

Breville Bambino Plus - Espresso Machine ...
\$499
Add to cart

De'Longhi DedicArte - Espresso Machine ...
\$299
Add to cart

Gaggia Classic Pro E24 Espresso ...
\$499
Add to cart

1. Merkle, CX Imperatives, 2026, https://www.merkle.com/en/merkle-now/ebooks/cx-imperatives.html?utm_source=AlliancePartner&utm_medium=Ebook&utm_campaign=2026_Merkle_Global_CX%20Imperatives_ebook

What consumers expect from AI-assisted commerce



01 Pre-purchase discovery gaps

Consumers expect AI-enhanced discovery and recommendations, but brands underperform in helping consumers compare products and find and research brands.

- 63% of consumers want better product discovery experiences.
- 67% prefer personalized recommendations over generic ads.
- 61% actively use visual or image search tools.



02 The trust paradox

Consumers want AI-powered experiences, but only with transparency and safeguards in place.

- 63% are concerned about AI data security, even as they agree AI improves CX.
- 62% worry about being hacked.
- 57% fear hidden tracking or surveillance.



03 Post-purchase experience gaps

Agentic commerce does not stop at checkout — consumers expect AI to resolve post-purchase issues seamlessly.

- 74% of consumers want improved post-purchase experiences.
- Brands have room to improve convenience, security and simplicity.

Key takeaways

- Consumers are hungry for truly personalized experiences, and agentic commerce technology now exists to support it.
- Most retailers are not structured to deliver consistently across discovery, purchase and post-purchase.
- 92% of retail consumers say reliability and consistency are critical to their online shopping experience.
- A single misstep, especially one driven by AI, can erode the trust that took years to build.

92%

of retail consumers say reliability and consistency are critical to their online shopping experience

Why enterprises are failing to realize AI value

Enterprises face barriers that prevent them from implementing AI effectively, according to a Merkle study surveying 100 C-suite and VP executives.

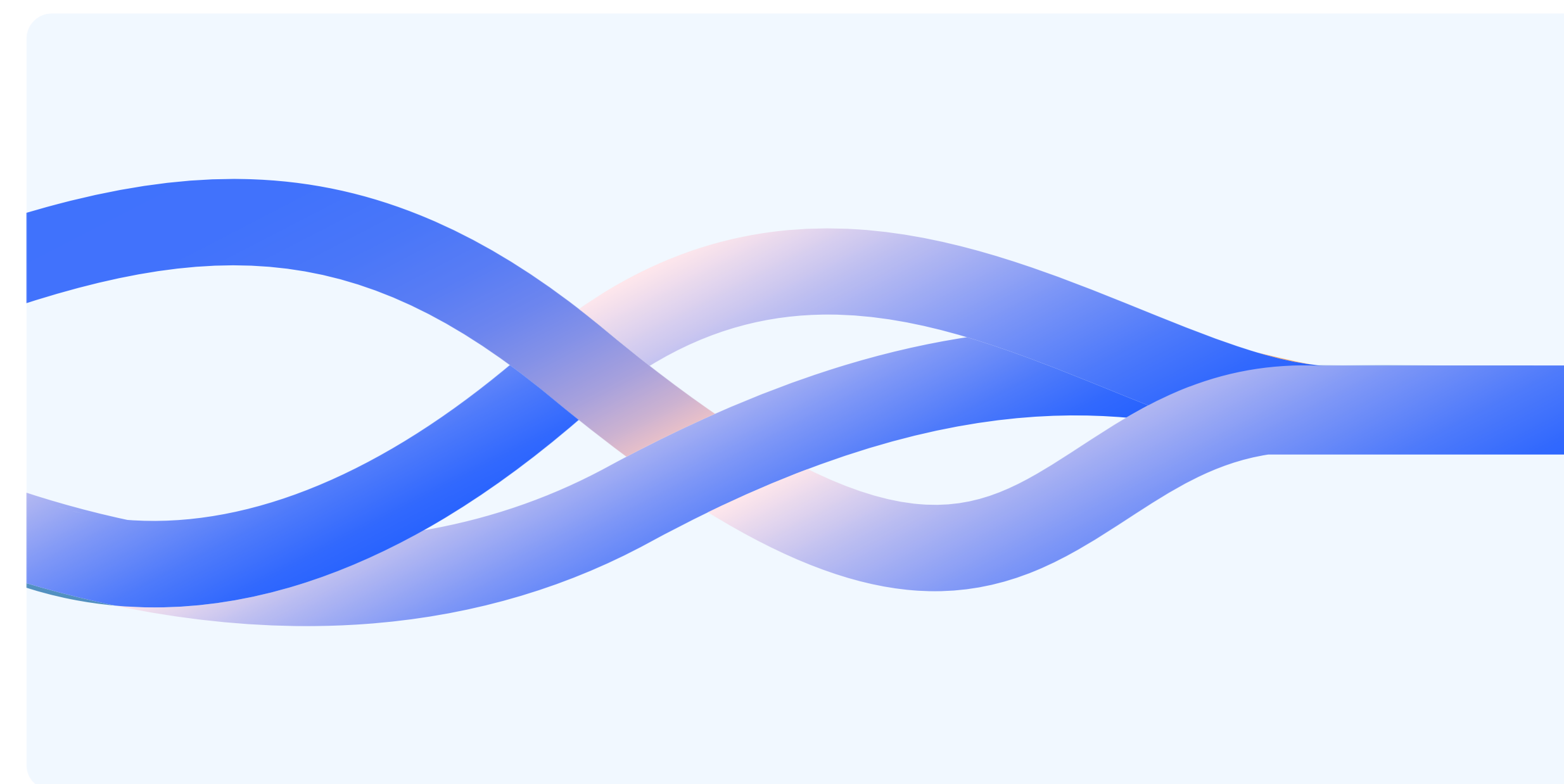


01

The ROI crisis

When AI tools are adopted without a clear strategy, companies struggle to create measurable business impact.

- Only 2% of enterprises have fully realized ROI on technology investments.
- 72% struggle with unclear success metrics or ROI.

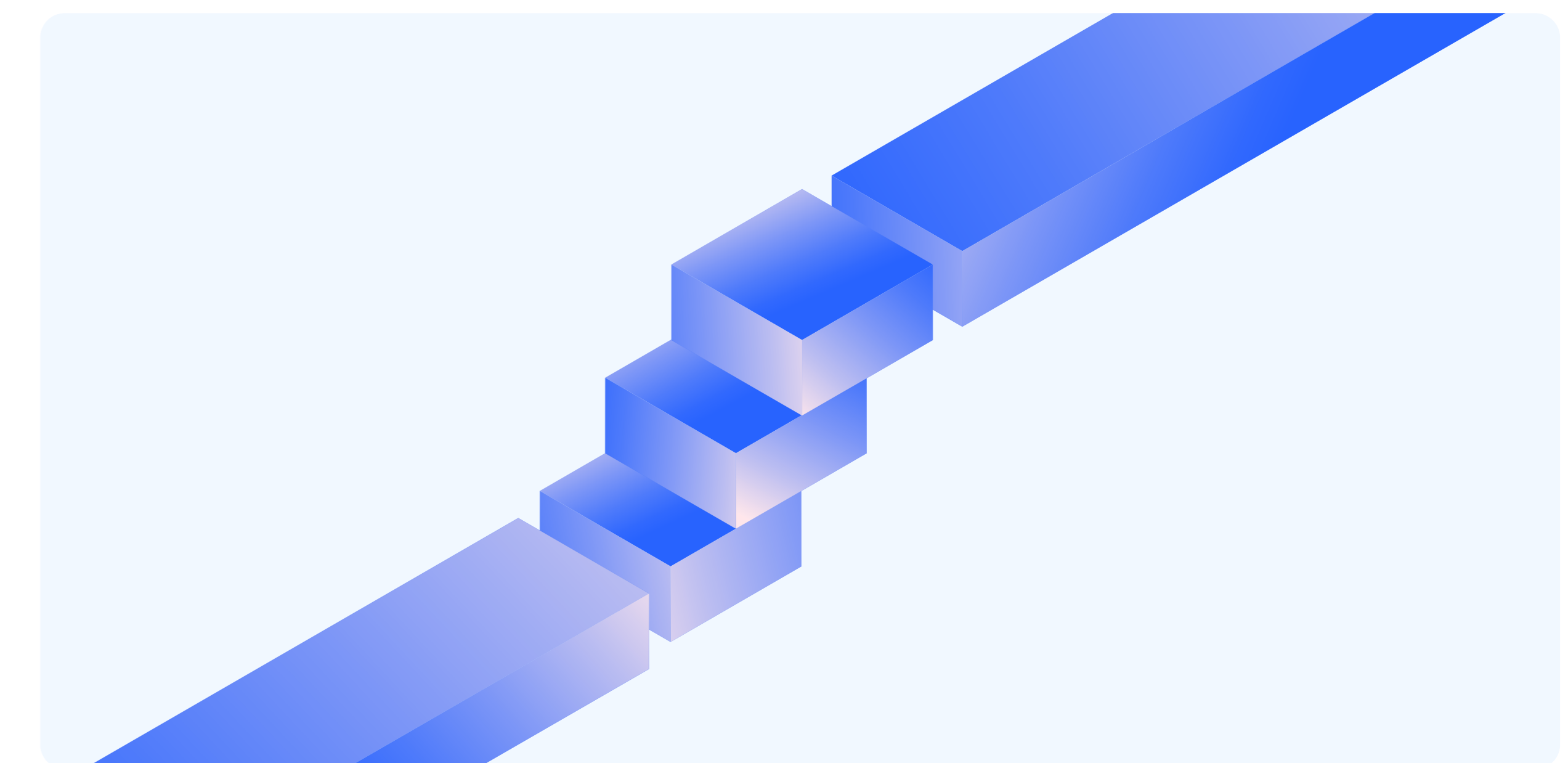


02

Organizational bottlenecks

Competing priorities, siloed teams and skills gaps prevent enterprises from scaling AI effectively.

- 64% are overwhelmed by competing transformation initiatives.
- 76% have fragmented processes; 74% battle structural silos.
- 65% face cultural resistance; 65% report insufficient training.



03

The governance gap

Without governance frameworks, AI initiatives remain experiments rather than core business operations.

- Developing organizations are 6× more likely to lack basic AI governance frameworks.
- 8% of developing organizations track zero success metrics for AI initiatives.

Key takeaways

- The challenge spans both technical complexity and organizational readiness.
- Many companies struggle to realize value because processes and skills are not in place to scale AI investments.
- Leading organizations are 3.5× more likely to have a formal change management function with dedicated resources.
- They are 2.5× more likely to have marketing, technology and data leaders aligned around a customer experience vision.
- They define success more clearly: prioritizing revenue impact (67% vs. 48%) and forecasting accuracy (44% vs. 17%).

Leading organizations are...

3.5×

more likely to have formal change management with dedicated resources

2.5×

more likely to have marketing, technology and data leaders aligned around a customer experience vision

92%

of retail consumers say reliability and consistency are critical to their online shopping experience

Consumer expectations for AI-assisted commerce are rising fast — yet only 2% of enterprises have fully realized ROI on their technology investments. The gap between what consumers expect and what brands can deliver is widening.

2%

of enterprises have fully realized ROI on technology investments

74%

of consumers want improved post-purchase experiences including returns and support

6x

more likely developing organizations are to lack basic AI governance frameworks

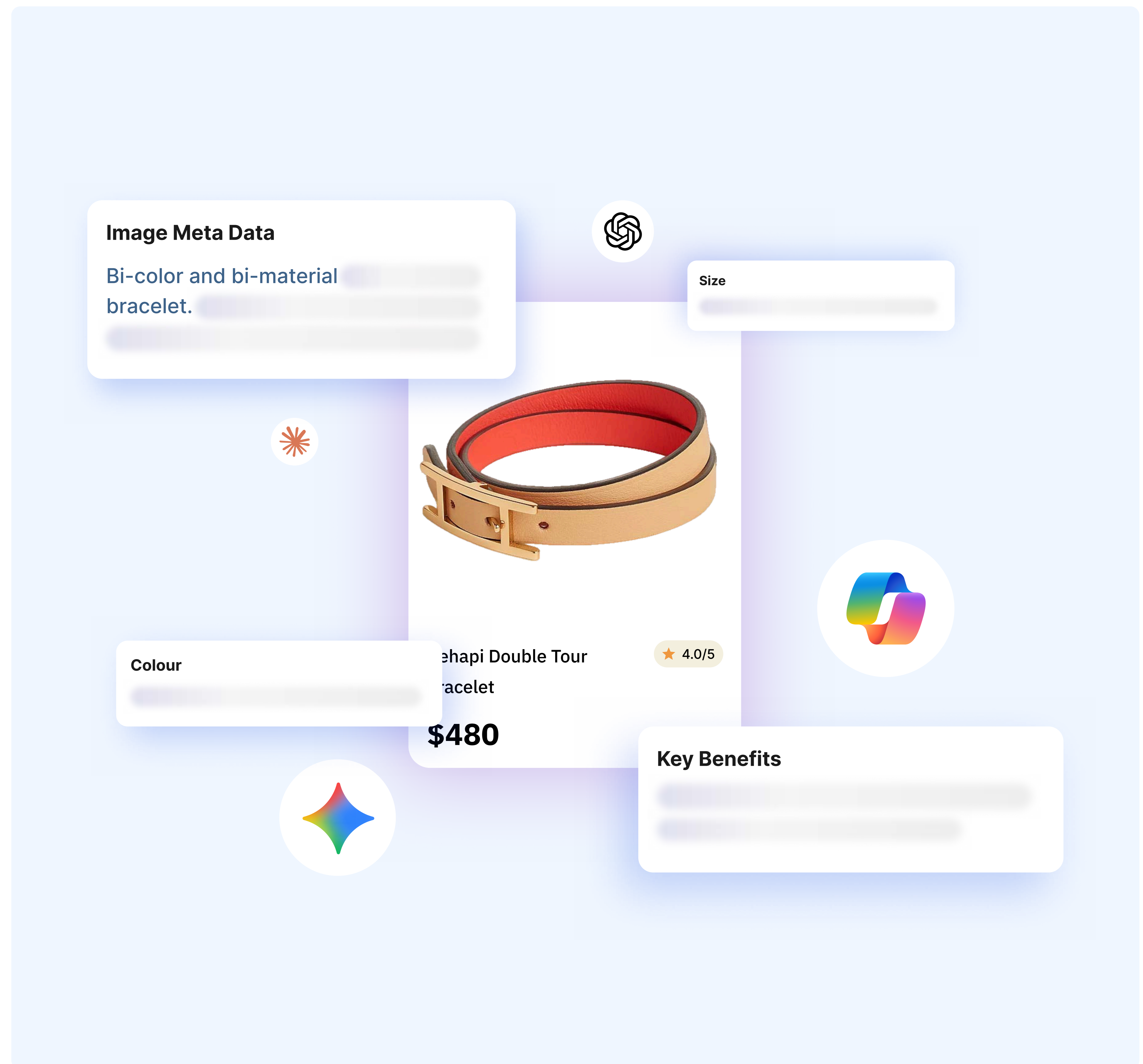
04

Chapter

The Four Pillars of Success

Winning in agentic commerce requires excellence across four interconnected pillars — and none can be skipped.

Based on research from Merkle, market data from BCG and Mirakl's insights, success in agentic commerce requires exceptional performance across four pillars.



Pillar 1: Product data excellence

In agentic commerce, a product data feed is the new storefront, telling AI agents what an item is, how much it costs, whether it's available and how quickly it can be delivered.

What Merkle's research shows

- 72% of enterprise retailers can't prove ROI on tech investments, often because the data feeding those systems is incomplete.
- 76% report fragmented processes, which makes it difficult to maintain consistent product information.

Why product data matters

Industry analysis shows that when product feeds aren't updated regularly, AI-generated shopping results risk surfacing products with inaccurate information. Items may appear with missing attributes or poorly formatted data, making it harder for LLMs to understand products well enough to recommend them.

72%

of enterprise retailers can't prove ROI on tech investments — often due to incomplete data

76%

of enterprises report fragmented processes, making consistent product information hard to maintain

Product data excellence

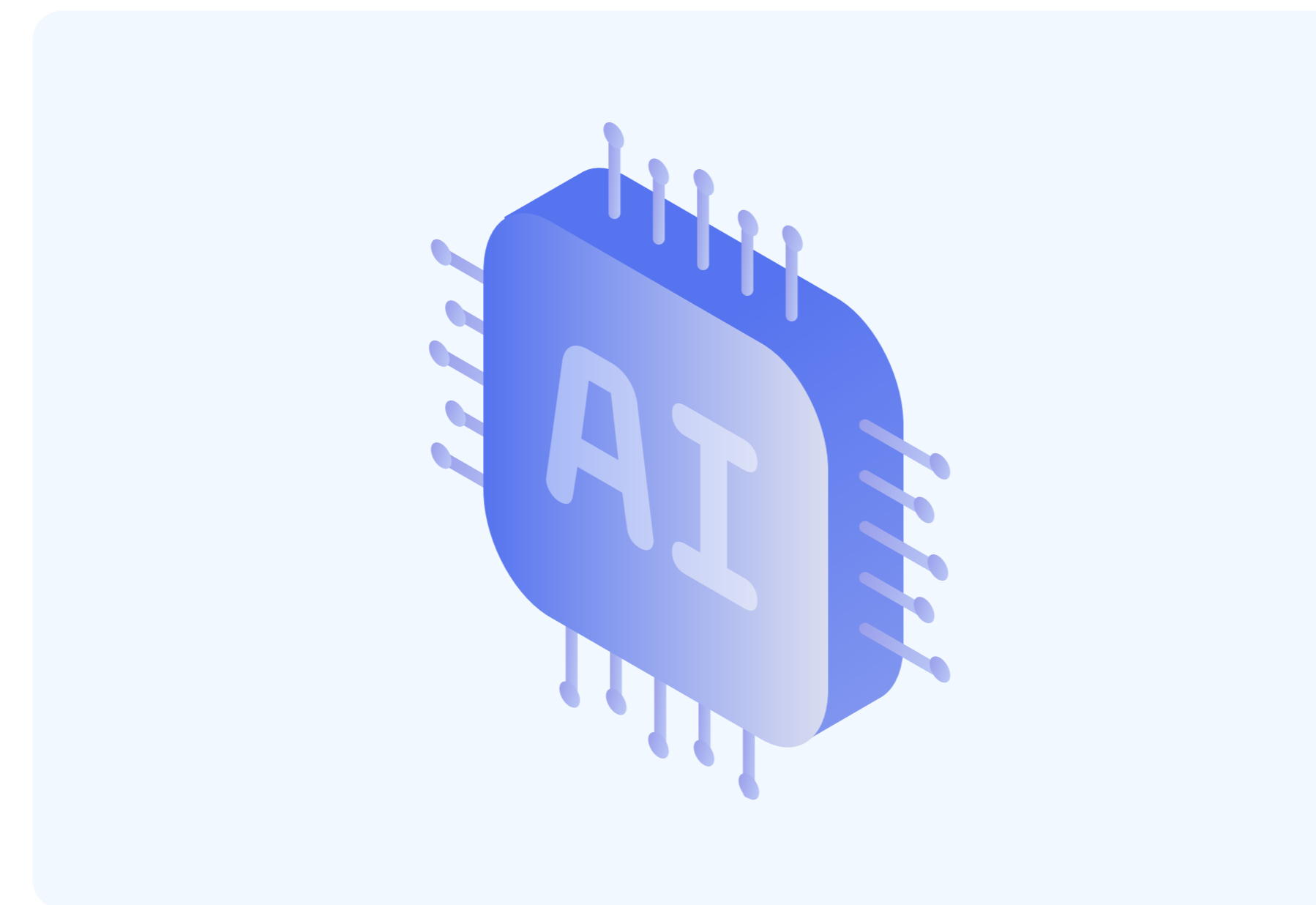


01

Maintain data with AI

GTINs, UPCs and pricing must be accurate and formatted so LLMs can interpret them. AI tools transform raw data into agent-ready formats.

Use AI-powered tools to convert raw product information into agent-ready formats.



02

Onboard supplier data with AI

Deploy AI tools to quickly onboard supplier data and fill in descriptions, colors, sizes, fit and specifications for accurate, agent-surfaceable listings.



03

Update data frequently

Stale inventory or outdated pricing hurts AI-driven visibility. Automated audits allow brands to refresh feeds daily — or even hourly.



04

Standardize machine-readable data

Product information should follow consistent formats across channels. Real-time synchronization ensures every channel displays the same current information.

Pillar 2: Contextual enrichment

Consumers today search less with keywords and more with intent. Therefore, AI systems need context that explains why a product fits a shopper's needs.

What Merkle's research shows

- 67% of consumers prefer personalized recommendations.
- 60% use generative AI as part of their customer experiences.

Why contextual enrichment matters

Columbia School of Business research shows that product descriptions optimized for context increase the likelihood that AI systems will select that product by 20%. Context-rich descriptions explain how, when and for whom a product is useful. Instead of "waterproof hiking jacket, nylon shell," a context-rich description would be, "lightweight waterproof hiking jacket designed for cold, wet trail conditions with room for layering." Reviews have an impact as well, with strong reviews allowing products to be priced 17–37% higher than similar products with weaker reviews. AI agents also gather signals from outside sources such as Reddit, YouTube and Quora, making it critical that brand content and customer feedback appear across the broader web, not just on their own product pages.

20%

increase in likelihood AI selects a product when descriptions are optimized for context (Columbia School of Business)

17–
37%

higher pricing premium enabled by strong product reviews versus weaker ones

1. Columbia School of Business, What Is Your AI Agent Buying? Evaluation, Biases, Model Dependence, & Emerging Implications for Agentic E-Commerce, 2025, https://papers.ssrn.com/sol3/papers.cfm?abstract_id=5381574

Contextual enrichment



01

Describe real-world use

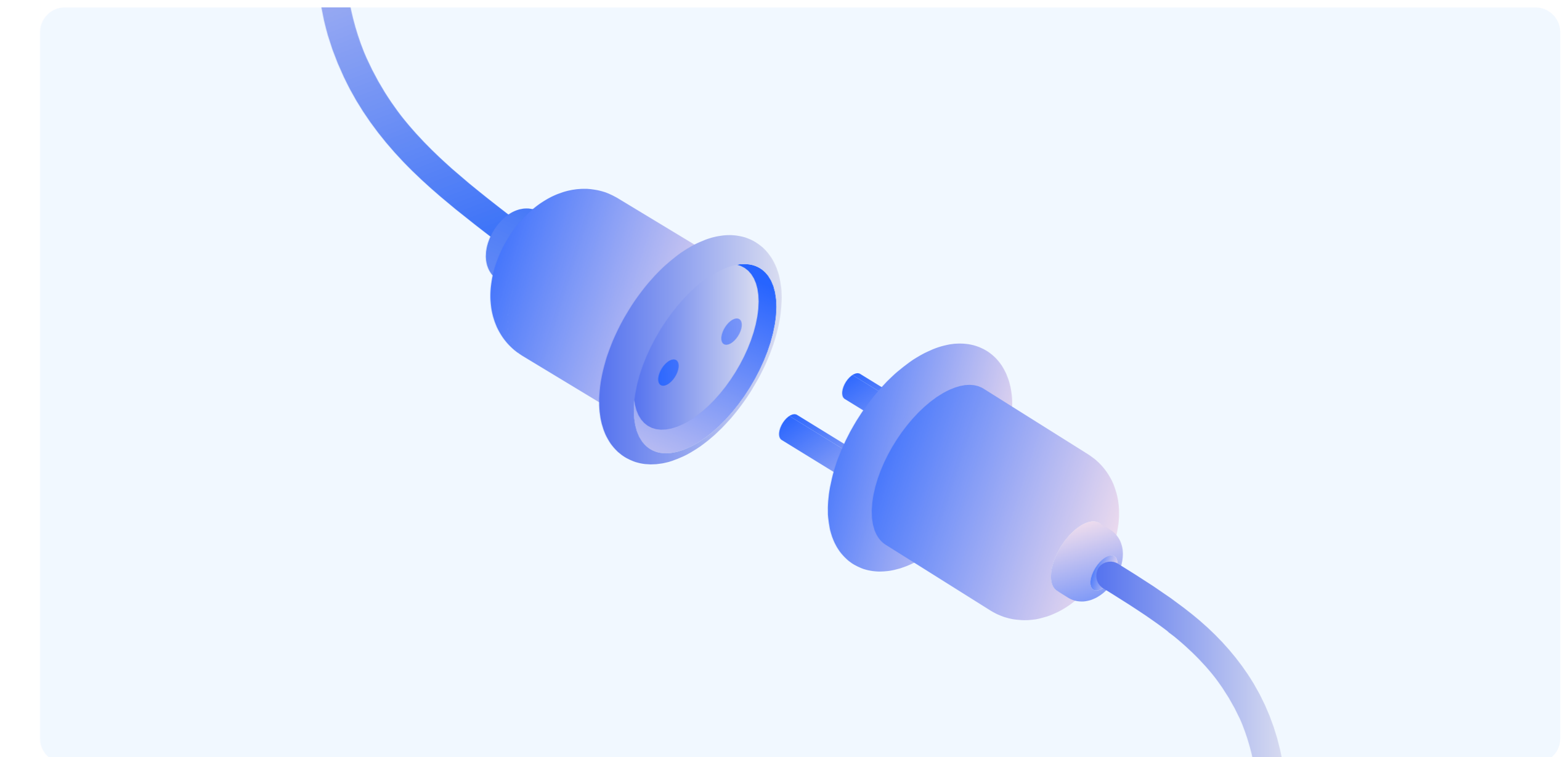
Move beyond basic specs — describe product benefits and use cases to help AI systems match products to contextual queries.



02

Add semantic attributes

Compatibility details, materials, dimensions and intended environments help AI know when a product fits a specific request.



03

Apply GEO practices

Use descriptive titles, natural-language FAQs and structured data that reflects how people actually search to help LLMs interpret products.

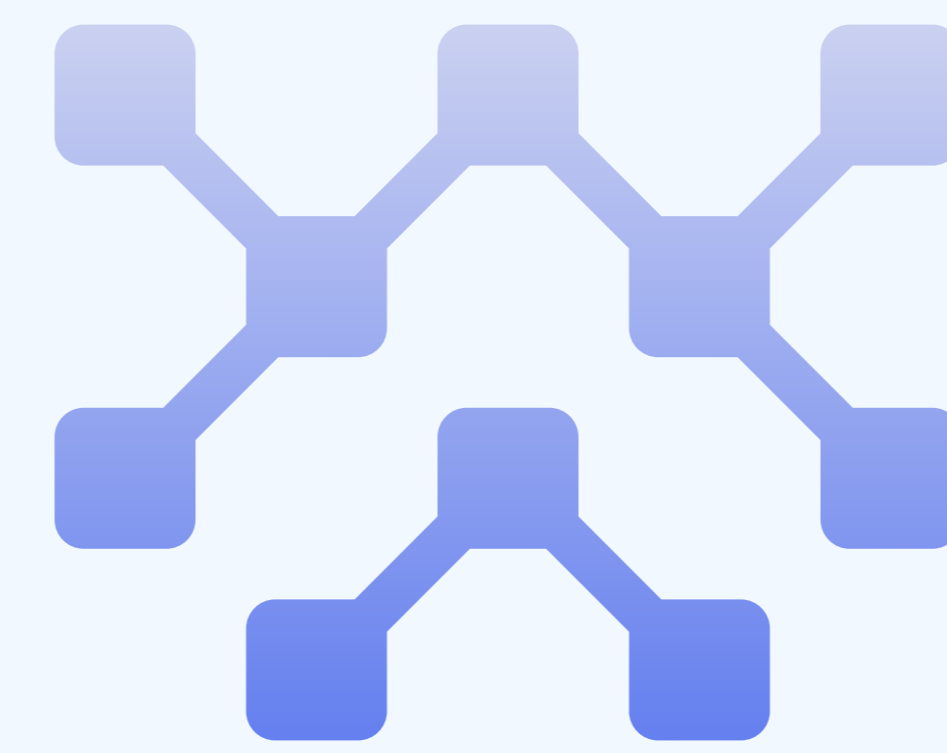
Contextual enrichment



04

Integrate user-generated content

Customer reviews and expert tips provide real-world context that AI systems use to recommend products.



05

Add descriptive image metadata

Tag images with structured descriptions of features, colors and use scenarios so LLMs can connect images to search queries.



06

Separate front-end and back-end data

Show shoppers key benefits and specs on product pages; store contextual metadata in back-end fields that LLMs rely on for recommendations.

Pillar 3: Assortment and competitive edge

AI systems recommend retailers that have the assortment to satisfy the full intent behind a query.

What Merkle's research shows

- 63% of consumers want better product discovery before making a purchase.
- 64% of enterprises are overwhelmed by competing internal transformation initiatives, which makes expanding product assortment more difficult.

Why assortment matters

Limited assortment hurts a retailer's chances of appearing in contextual AI queries. Generally speaking, assortments that offer a narrow selection have lower discoverability and ranking performance.

Consumer searches are also evolving in parallel, moving from single-product queries to multi-product scenarios. When a shopper asks "everything needed for a family camping trip for under \$500," AI will recommend a retailer that offers the tent, sleeping bags and other accessories together.

63%

of consumers want better product discovery before making a purchase.

64%

of enterprises are overwhelmed by competing internal transformation initiatives, which makes expanding product assortment more difficult.

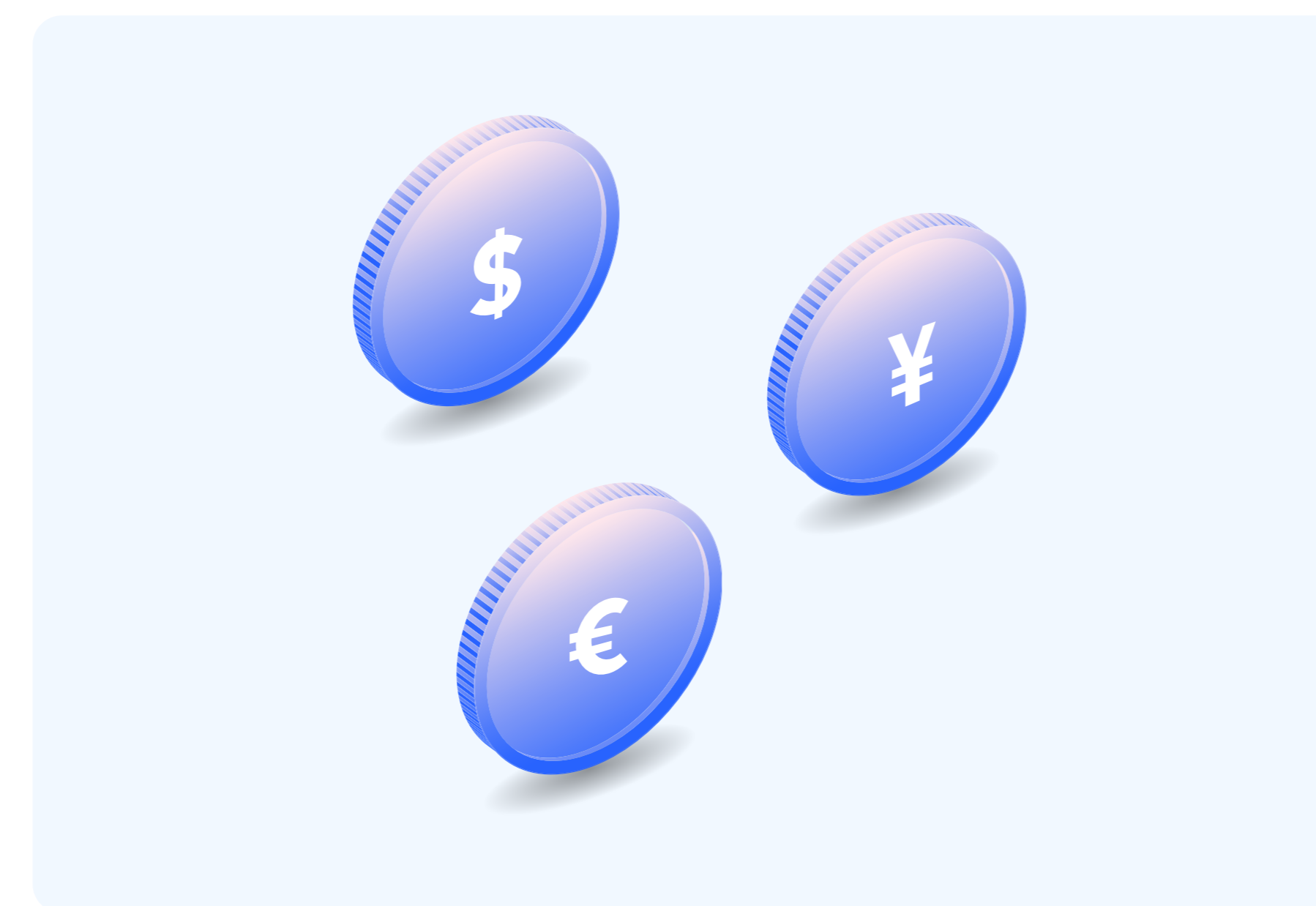
Assortment and competitive edge



01

Broaden via marketplace

Third-party sellers let retailers offer more brands, categories and products without purchasing inventory upfront, improving availability and AI discoverability.



02

Offer competitive pricing

AI shopping tools compare similar items across retailers. Higher prices than competitors reduce the likelihood of appearing in AI recommendations.



03

Maintain product availability

Items that frequently go out of stock lose ranking signals over time, making reliable inventory an important factor in AI-driven discovery.



04

Use distributed inventory

Spreading inventory across sellers enables greater availability and faster delivery, which strengthens ranking signals with AI agents.

CASE STUDY

Retailer using Mirakl-powered marketplace outperforms mass competitors

A specialized retailer tapped Mirakl to power its marketplace and has consistently dominated larger competitors like Walmart, Amazon and Target in AI-driven shopping results.

Showing up in ChatGPT results

Mirakl customer	93.7%
Walmart	72.3%
Amazon	51.7%
Target	50.2%

Ranking first in results

Mirakl customer	17.7%
Walmart	1.2%
Amazon	13.9%
Target	2.2%

Why the marketplace matters

The retailer's advantage is directly tied to its marketplace model:

Overall, the retailer's marketplace drives a +24.3% increase in discoverability and a +4.7% lift in top rankings.

Impact on discoverability (showing up in ChatGPT results)

- Removing marketplace-only products reduces visibility from **93.7% to 90%**.
- Removing competitive third-party pricing drops visibility from **93.7% to 82.5%**.
- Removing third-party support for first-party out-of-stock items lowers visibility from **93.7% to 69.4%**.

Impact on top rankings (ranking first in results)

- Removing competitive third-party pricing drops first-place ranking from **17.7% to 15.6%**.
- Removing third-party support for first-party out-of-stock items lowers first-place ranking from **17.7% to 13.0%**.

Pillar 4: Direct connection to LLMs

In addition to answering questions, many LLMs in the US are recommending products and enabling transactions within conversations.

If a retail brand is not directly connected to LLMs, it risks being invisible to customers at the moment they decide what to buy.

What Merkle's research shows

- 74% of consumers want better post-purchase experiences, including returns, delivery updates and customer support.
- 62% of consumers worry about being hacked, and 63% are concerned about data protection, highlighting the importance of trust and security.
- 76% of enterprises report fragmented internal processes, making it harder to deliver consistent service across channels.

LLMs like Perplexity, Copilot and Gemini are becoming key shopping channels, where consumers ask for recommendations and immediately purchase. Without a direct connection, your brand risks being invisible at that pivotal moment. Direct integration ensures LLMs work with your real-time product data, including pricing and inventory, while enabling in-chat transactions. The result: AI shifts from a passive discovery tool to an active sales channel.

74%

of consumers want better post-purchase experiences — returns, delivery updates and support

76%

of enterprises report fragmented internal processes making consistent service difficult

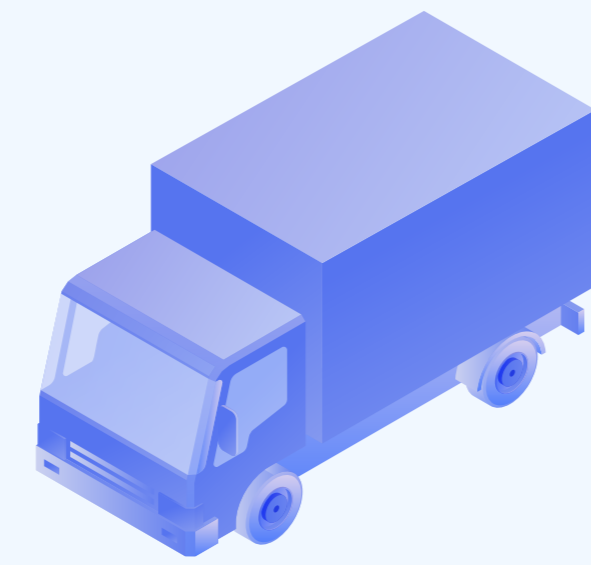
Direct connection to LLMs



01

Sync inventory and pricing

Real-time updates ensure LLMs recommend correctly priced and available products at the moment of purchase intent.



02

Provide delivery promises

Shipping times and fulfillment options should be clearly stated in product feeds so LLMs can match delivery expectations with customer intent.



03

Maintain reliable fulfillment

Order accuracy, dependable delivery and responsive service help convince LLMs that a brand is trustworthy.



04

Automate post-purchase

Order tracking, returns, refunds and support must be integrated and reliable — LLMs factor service quality into recommendations.

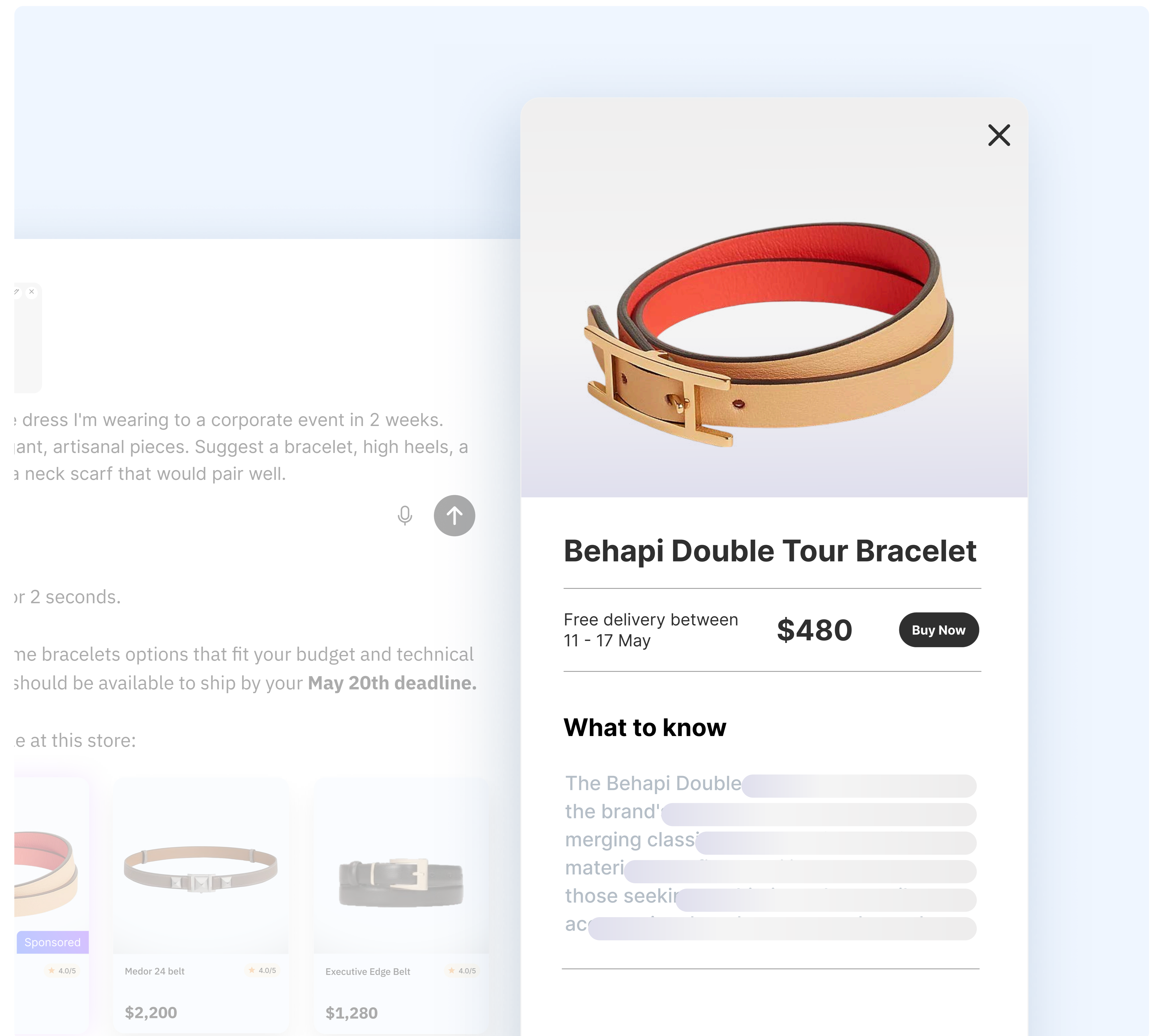


05

Maintain secure payments

Secure payment frameworks such as tokenized payment systems keep transactions safe and build trust with shoppers and LLMs alike.

These four pillars aren't new to CX transformation. Accurate product data, robust descriptions, broad assortment and consistent delivery have always been critical to great shopping experiences. The difference is that agentic shoppers have no patience for ambiguity. They won't infer what you meant or navigate to find what they need. They'll simply move on and not surface your products.



The screenshot shows a shopping interface with a product recommendation. At the top, a text box contains a user query: "I'm wearing a dress to a corporate event in 2 weeks. I want elegant, artisanal pieces. Suggest a bracelet, high heels, a necklace, and a neck scarf that would pair well." Below the query is a microphone icon and an upward arrow icon. The interface displays a product card for the "Behapi Double Tour Bracelet". The card features a high-quality image of the bracelet, which is made of gold-toned leather with a red interior lining and a gold-toned buckle. The product title is "Behapi Double Tour Bracelet". Below the title, it states "Free delivery between 11 - 17 May" and the price is "\$480". A "Buy Now" button is visible. Underneath the price, there is a section titled "What to know" with several lines of text, some of which are blurred. At the bottom of the interface, there is a section titled "More at this store:" which displays three product cards. The first card is labeled "Sponsored" and shows a bracelet with a 4.0/5 rating. The second card is for the "Medor 24 belt" with a 4.0/5 rating and a price of "\$2,200". The third card is for the "Executive Edge Belt" with a 4.0/5 rating and a price of "\$1,280".

I'm wearing a dress to a corporate event in 2 weeks. I want elegant, artisanal pieces. Suggest a bracelet, high heels, a necklace, and a neck scarf that would pair well.

Free delivery between 11 - 17 May

\$480 Buy Now

Behapi Double Tour Bracelet

What to know

The Behapi Double
the brand'
merging class
materi
those seekir
ac

More at this store:

Product	Rating	Price
Sponsored	4.0/5	
Medor 24 belt	4.0/5	\$2,200
Executive Edge Belt	4.0/5	\$1,280

31%

GMV growth for marketplace and dropship platforms in 2025 — nearly 4.5× the rate of traditional eCommerce

Retailers that excel across all four pillars — product data, contextual enrichment, assortment and LLM connection — are already outperforming traditional eCommerce and larger mass competitors in AI-driven discovery.

93.7%

of the time a Mirakl-powered retailer shows up in ChatGPT results — vs. 72.3% for Walmart

20%

increase in AI selection likelihood from context-optimized product descriptions

4.5×

faster GMV growth on marketplace platforms vs. traditional eCommerce

05

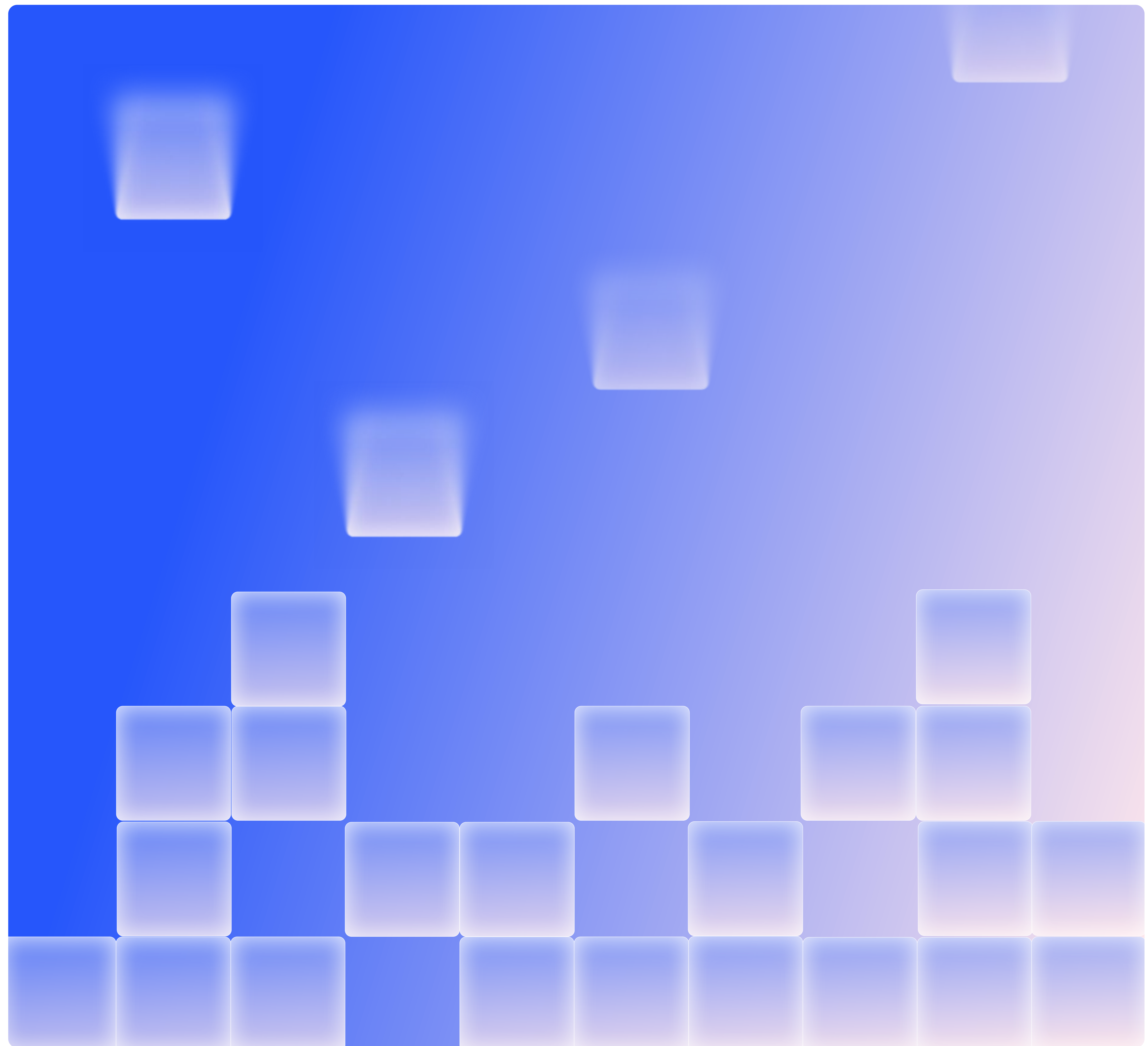
Chapter

From Insight to Action

Practical foundations and three concrete next steps to compete in the agentic commerce era.

If AI systems are the new layer between shoppers and retailers, the challenge for enterprises is turning this reality into practical action.

Organizations making real progress are not rebuilding commerce from scratch. Instead, they are using scalable, platform-based models to adapt how their products are discovered, evaluated and purchased in AI environments.



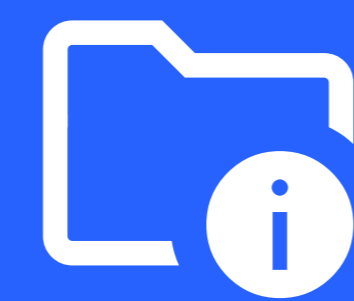
The building blocks of agentic commerce



01

Rich product pages

The foundation. Product pages need complete information with clear, consistent attributes — every detail, from specs to use cases, helps shoppers and AI evaluate products.



02

Complete metadata

The GEO layer. Structured, behind-the-scenes data — including reviews, image descriptions and attributes — improves how products are indexed, interpreted and ranked by AI systems.



03

Agent-ready catalog feeds

The transaction layer. Fully structured product feeds — including pricing, inventory and policies — formatted so AI systems can access, compare and act on them for both discovery and purchase.

Three next steps to prepare for agentic commerce

01

NOW

Audit your foundation

Conduct a product catalog data audit measuring against GTINs, UPCs, accurate pricing, availability and delivery information.

Evaluate data freshness: confirm inventory, pricing and shipping information are updated frequently enough to reflect real-time availability.

Identify missing or inconsistent attributes that could limit AI-driven discovery.

Streamline supplier data integration using automated feeds or AI tools to reduce manual work.

02

NEAR TERM

Get ready for LLM-based discovery and purchase

Measure your starting point: understand how your brand and products appear in LLMs today.

Improve product data for AI discovery by adding detailed, contextual information so LLMs can understand and recommend products in context.

Make real-time commerce data accessible: ensure pricing, availability, promotions and delivery estimates can be surfaced accurately.

Deploy across multiple LLMs and prepare for transactions, not just discovery.

03

IN PARALLEL

Build organizational readiness

Assess internal capabilities: evaluate skills, governance and operations against challenges identified in Merkle's research.

Establish AI governance: advanced organizations are more likely to have defined frameworks for data quality and AI usage.

Invest in training: data and operations teams must understand how AI-driven commerce changes discovery, pricing and product management.

06

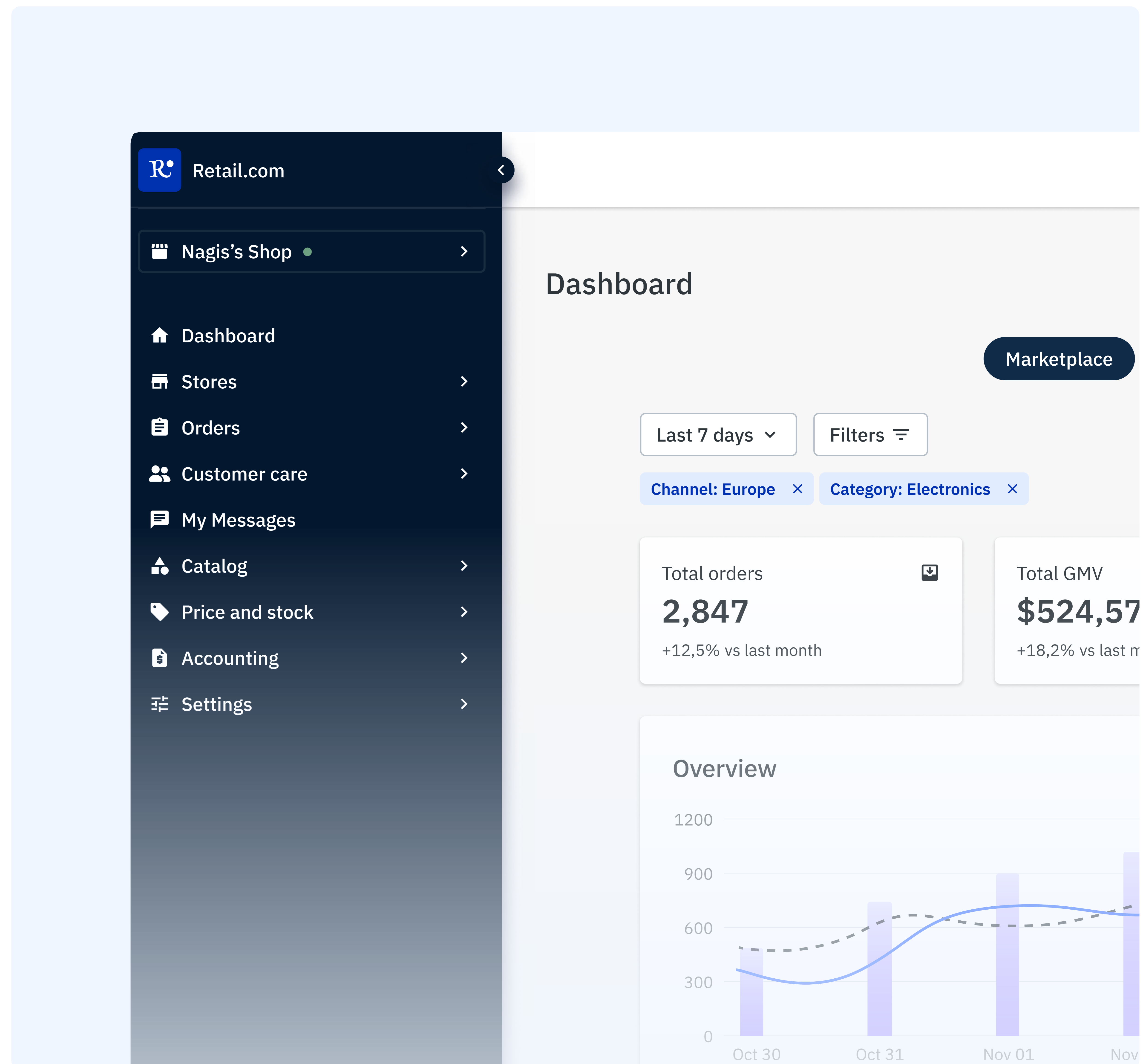
Chapter

Why Marketplaces Win

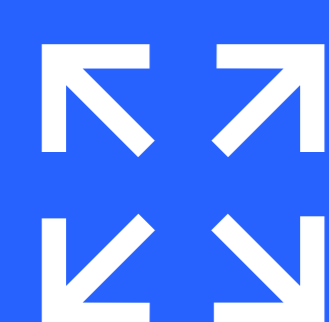
Agentic commerce rewards scale, speed and consistency. Marketplace platforms are built to deliver all three.

Consequently, marketplaces can do two things at once. They improve the customer experience (broader product availability, more relevant recommendations), while simplifying enterprise operations (consolidate different systems into one unified platform, reduce the need for in-house expertise).

These advantages set the stage for how marketplaces support agentic commerce in practice.



Three marketplace-agentic commerce advantages



01

Expand assortment without risk

Third-party sellers introduce new brands and categories without upfront inventory. Marketplaces grow selection and revenue without proportional operational cost increases.

- Sellers provide products and fulfillment — retailers expand catalog without inventory risk.
- Mirakl analysis: 31% GMV growth vs. 6.9% for traditional eCommerce.



02

Maintain data quality at scale

Individual sellers maintain listings while marketplace platforms enforce accuracy standards. AI-powered tools convert product data into machine-readable formats at onboarding.

- Distributes catalog maintenance across sellers — manageable at scale.
- AI catalog tools keep product information consistent across the entire catalog.



03

Simplify operational complexity

Marketplace platforms centralize inventory sync, order processing, fulfillment tracking and after-sales support. Distributed inventory improves availability and delivery speed.

- Centralized standards guide decentralized seller execution.
- Broader availability without reliance on a single warehouse network.

Final thoughts

Research from Merkle and Mirakl shows that most AI investments fall short because organizations are not prepared to scale them. Meanwhile, consumer expectations for AI-assisted shopping continue to rise.

Agentic commerce is already shaping the future of shopping. The key question for retailers is whether they are prepared to compete in that future.

The companies that have a better chance of succeeding with AI investments share a similar approach: they strengthen product data, expand assortment, improve operations and build organizational readiness — all at the same time.





In partnership with Merkle

This report draws on two proprietary Merkle research studies: an Enterprise Study of 100 C-suite and VP-level executives at companies with 500+ employees (November 2025), and a Consumer Study of 2,500 global consumers across retail, travel, financial services, healthcare and media (2025). Additional insights from Mirakl are based on analysis of marketplace performance, BCG research and agentic commerce implementations.

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