

The waves reshaping ecommerce

Marketplaces, Social Commerce & Agentic

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Speaker



Mitchell Dröge

Alliance Manager



- Alliances & Marketplace Partnerships
- Global Ecommerce Trend & Developments





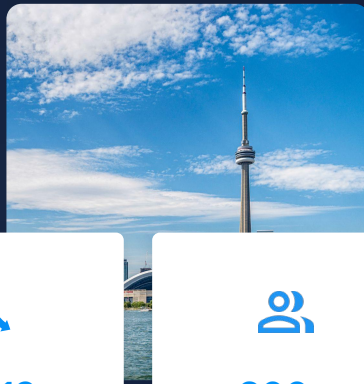
1300+

Marketplaces &
3rd party sales
channels



2013

Founded in Leiden,
the Netherlands



200+

Team of
marketplace
professionals



channelengine



Offices

Leiden, the Netherlands
Berlin, Germany
New York, US
Toronto, Canada
Singapore
Dubai, UAE



4.5+

Average rating on
G2 & Capterra



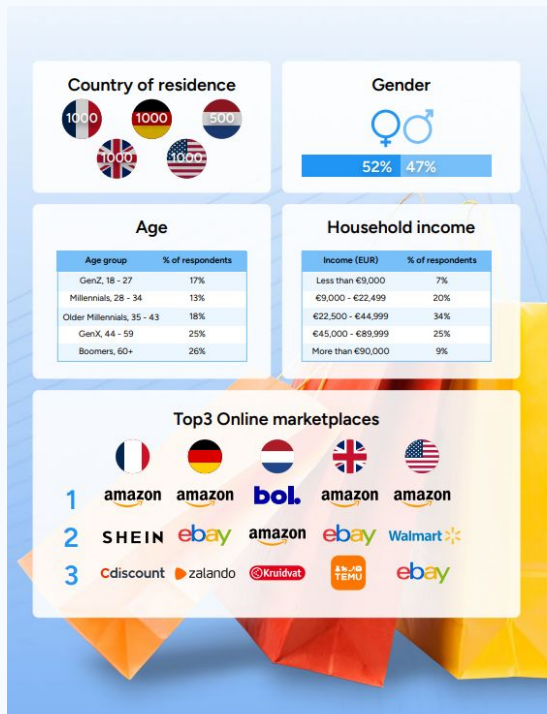
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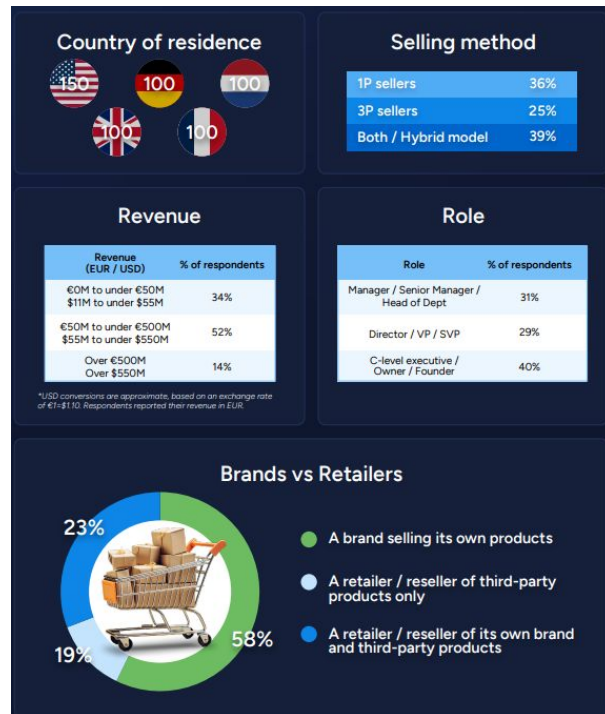
Marketplace Shopping Behavior Report

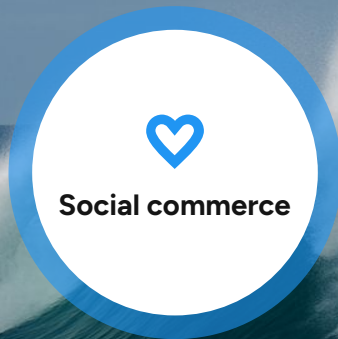
Surveyed 4,500 shoppers in 5 countries on marketplace behavior



Marketplace seller trends report

Insights based on 550 marketplace decision-makers





The 3 Waves Reshaping Global Ecommerce

Marketplaces

Wave.1

Top marketplaces being sold on

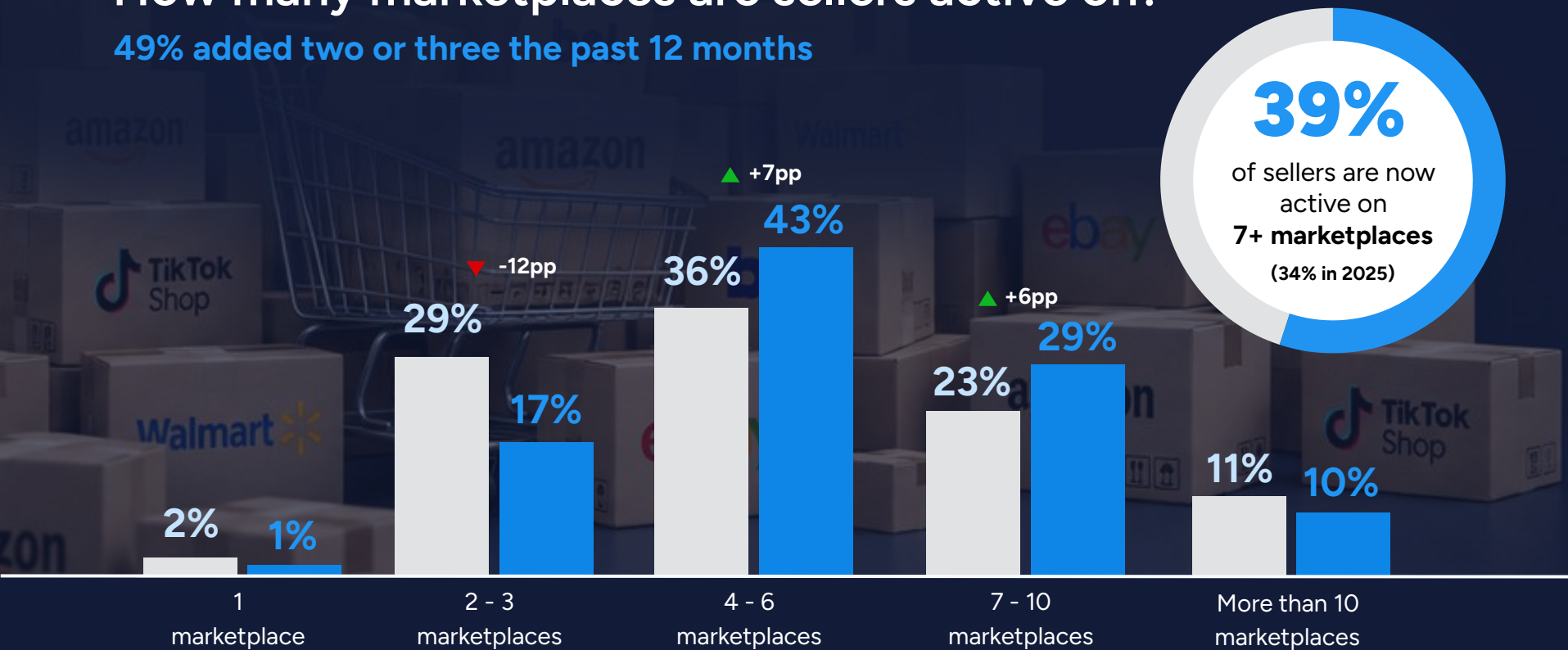
	 US	 UK	 Germany	 France	 Netherlands
#1					
#2					
#3					
#4					

Note: Amazon figures reflect activity across all Amazon marketplaces, not exclusively the domestic one. Local marketplaces may still lead in domestic seller adoption within each market.

Wave.1

How many marketplaces are sellers active on?

49% added two or three the past 12 months



Q. How many online marketplaces are you currently active on (with listings and sales)?

2025 2026

Wave.1

The new battleground is confidence

Value signals win the final click

- ◇ **Trust signals** decide the shortlist
- ◇ **Price** is still #1
- ◇ **Shipping and availability** matter

Analysis Bol: Next day is **147% GMV uplift**

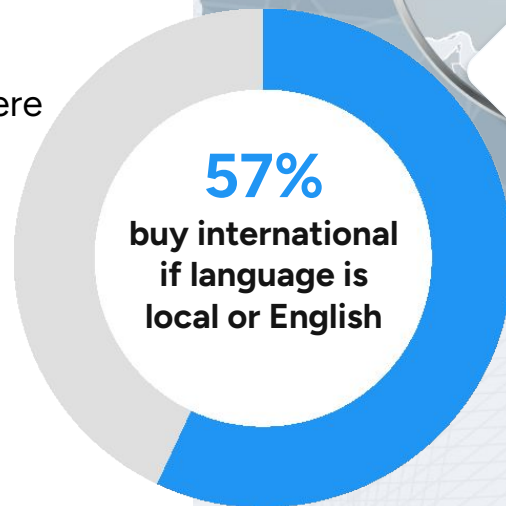


Wave.1

Marketplaces are a portfolio, not one channel

Marketplace strategy = portfolio + localisation

- ◇ Be present across **multiple marketplaces**, not just one
- ◇ **Localise** language & delivery expectations
- ◇ Keep **pricing and content consistent** everywhere





The 3 Waves Reshaping Global Ecommerce

Social commerce

What is Social Commerce?

"Shopping journey where product discovery to transaction happens within social media or messaging app"

Key examples



Douyin/TikTok Shop

- Live in NA/LATAM/APAC/EU
- Global leader



META Shopping

- Facebook: 2020 - 2022 
- Instagram: 2020 - 2023 



Youtube Shopping

- live in NA/APAC/EU
- Pilot with Bol in NL

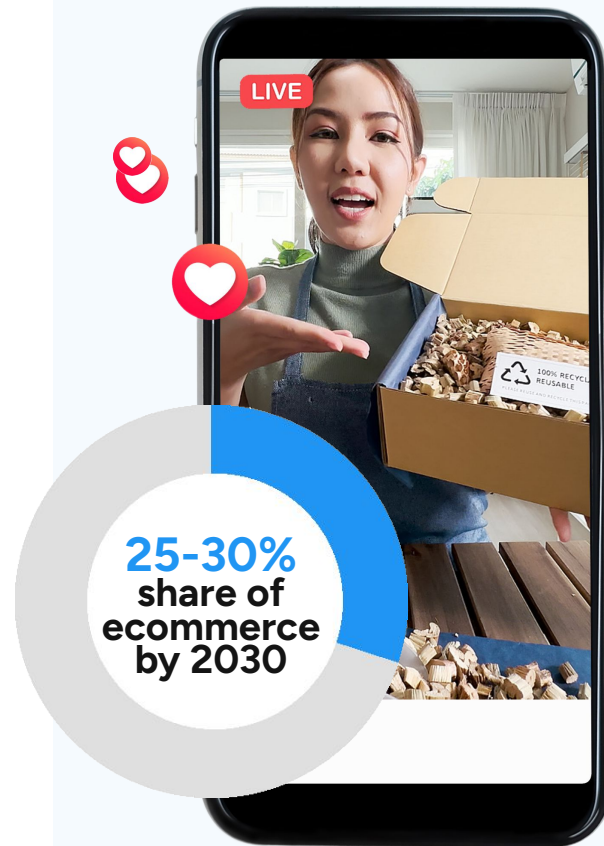


whatnot

- jumped to \$8B
- US only

Social Commerce

- ◇ Social commerce will achieve global revenue of **US\$6.2 trillion by 2030.**
(increasing from US\$575.8 billion in 2021).
- ◇ The total expenditure per customer via social channels is also predicted to double from its current levels to **US\$1,224** per user in 2027.



TikTok's entertainment dominance

Estimated number of minutes watched in 2025/26 (Global)



Netflix
7.5 trillion minutes



Instagram
12 trillion minutes



Tiktok
40 trillion minutes

Road to global social commerce dominance



TikTok (2017) = International version of **Douyin (2016)** under parent company **ByteDance**

Douyin's GMV in 2025 = \$550 billion

Stay tuned for TTS GMV



TTS first launched in Indonesia (2021), close to Douyin's home market.

Indonesia's government blocked this to protect its local marketplaces by forbidding social commerce, which ByteDance overcame by acquiring the biggest local marketplace Tokopedia!



Since then TTS has grown rapidly across the SEA region and **expanded to Europe, North America, LATAM and Japan**. UK was the first country outside of Asia and a testing ground for the US launch.

TikTok (Shop) US was forced to restructure into a joint venture with US investors (a.o. Oracle).

Wave.2

Social commerce

55%

of sellers are
now active on

 **TikTok Shop**

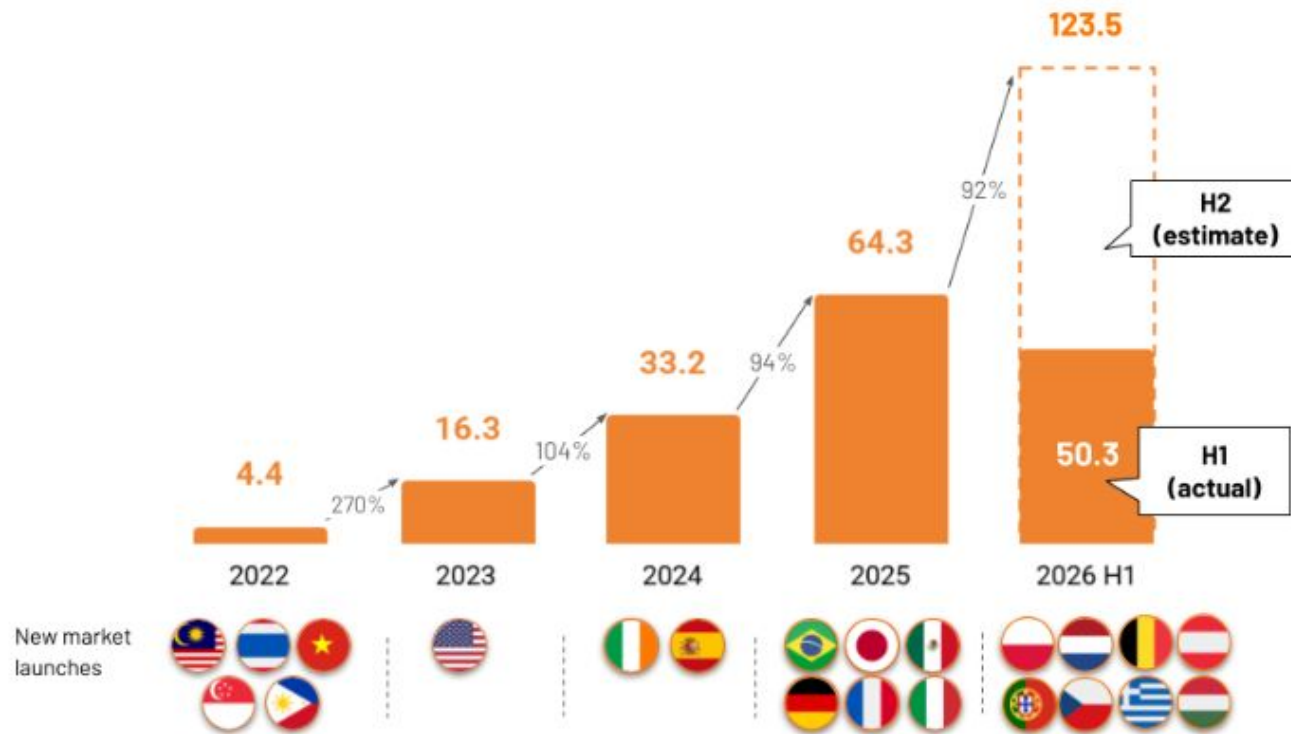
Social drives discovery.
Win it in the feed or lose the shortlist.



Social commerce has moved well beyond test-and-learn into a serious sales channel, particularly in categories where visual demonstration, fit, and inspiration drive purchase decisions.

TikTok Shop's global GMV will almost certainly surpass \$100 billion in 2026

2026 TikTok Shop global GMV (US\$ B)



TikTok Shop's rapid growth continues. We estimated the platform's global GMV for 1st half of 2026 to be **US\$50.3 billion**, a **92%** growth year on year.

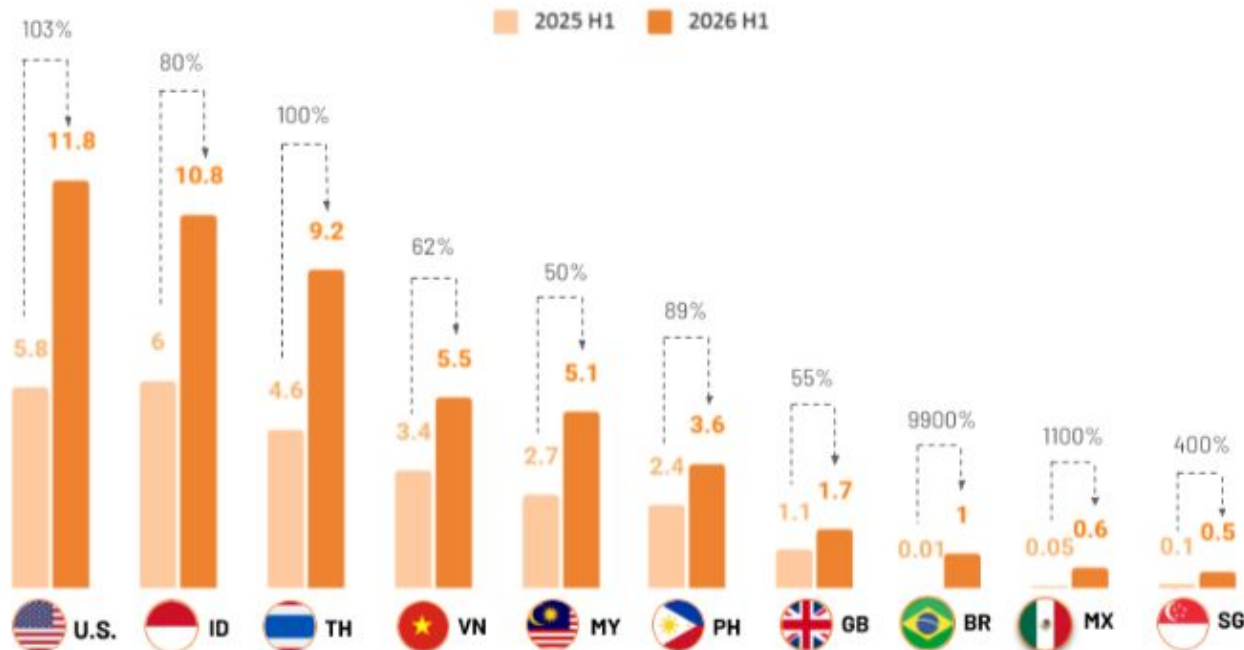
This also suggests a potential overall GMV will surpass US\$100 billion for the 1st time, reaching **US\$123.5 billion**.

U.S. and **Southeast Asia** remain the largest markets for TikTok Shop, while growth in **Mexico** and **Brazil** exceeded expectations.

United Kingdom, one of the two first markets launched by TikTok Shop (alongside Indonesia), has shown signs of recovery. TikTok Shop is also expanding in Europe and Japan - markets that require very different operating considerations compared to SEA and Latin America.

U.S. reclaimed crown as TikTok's largest market globally, again

2026 TikTok Shop GMV in key countries (US\$ B)



Over the last two years, Indonesia and U.S. alternated as TikTok Shop's largest market globally. In H1 2026, **U.S. market again overtook Indonesia in GMV**, reclaiming the crown.

While **Southeast Asia** still contribute to most of the global GMV and absolute growth in dollar terms, the relative strength of **Mexico and Brazil**, two markets launched in 2025, **has been impressive**. Much of the playbook that has worked in China and Southeast Asia has proven also to resonate well with the sellers, creators and consumers in these two markets.

Do note that other European countries as well as Japan are not covered on this chart.

Why TikTok Shop is different

Traditional

Traditional Marketplace

Search → Product → Purchase

New Paradigm

TikTok Shop

Content → Discovery → Interest → Purchase

TikTok Shop is content-driven commerce.

Product listings and operations are important, but creators, affiliates, organic content, LIVE and advertising help generate product discovery and demand.



Immersive and native ways to encourage people to browse and buy on TikTok

Organic formats



LIVE Shopping



Product Showcase



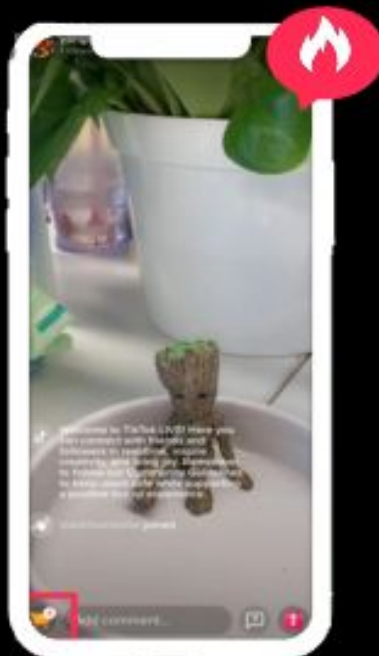
Video Shopping

Ad formats

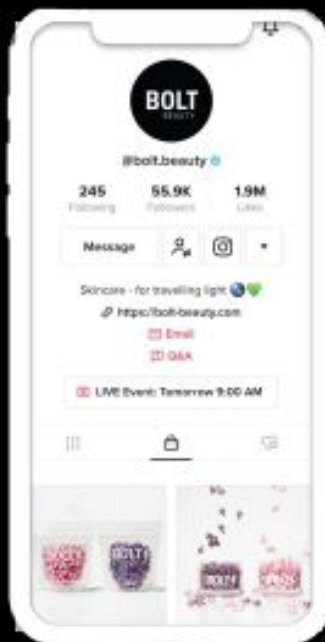
LIVE Shopping Ads

Video Shopping Ads

Spark Ads with Ecommerce
Anchor Link



LIVE Shopping



Product Showcase



Video Shopping



Key to success: Affiliates

How Affiliate Marketing Works

TikTok Shop allows creators to promote sellers' products and earn a **commission when their content generates a sale**.

Seller lists product → Creator promotes product → Shopper discovers content → Shopper purchases → Creator earns commission

Two Key Approaches

Option 01

Open Collaboration

Products are made available for eligible creators to discover and promote.

Option 02

Targeted Collaboration

Sellers proactively recruit specific creators to promote their products.

Affiliate tactics

01 RECRUIT → 02 TEST → 03 MEASURE → 04 SCALE → 05 RETAIN

01

RECRUIT

Find creators whose audience and content align with the product.

02

TEST

Work with multiple creators and content styles instead of relying on one influencer or campaign.

03

MEASURE

Focus on commerce performance—not just followers and views.

04

SCALE

Identify creators, products and creative angles generating sales and invest further in what works.

05

RETAIN

Build relationships with top-performing affiliates through competitive commissions, samples, new launches and continued collaboration.

The Social Search Revolution

Shifting intent from entertainment to solution finding

Google

Traditional search

Best lunch in NYC



40%

of Gen Z use TikTok
for search instead
of Google

TikTok

Social search



Wave.2

Social commerce is powerful, but selective

Social drives discovery. Not everyone converts there

- ◇ Social wins discovery in **visual** categories.
- ◇ Creator-led **content** matters. Creators move the shortlist
- ◇ Not universal. Large segment still opts out

39%

would not consider
purchasing via
social commerce

3x

Faster growth than
traditional
Ecommerce





The 3 Waves Reshaping Global Ecommerce

Agentic

What does agentic commerce look like in practice?

Not all AI works the same way



General AI Platforms

Discovery & early decision-making



Marketplace & Retail Agents

Embedded in shopping environments



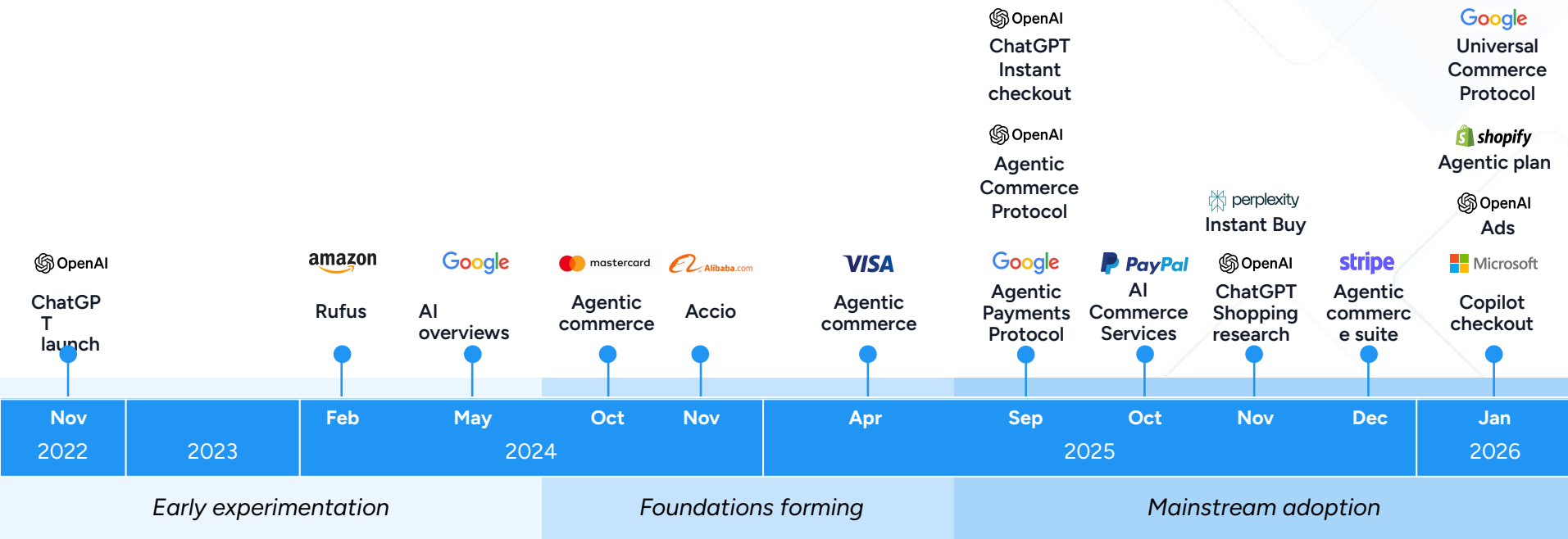
Payment & Transactional Agents

In-app discovery and autonomous checkout



The rise of agentic commerce

How the ecosystem moved from experimentation to real-world deployment





33%

18%  Google AI15% 

11% AI assistants within marketplace platforms

10%  Rufus

8% Virtual try-on or stylist app

6%  perplexity

Others

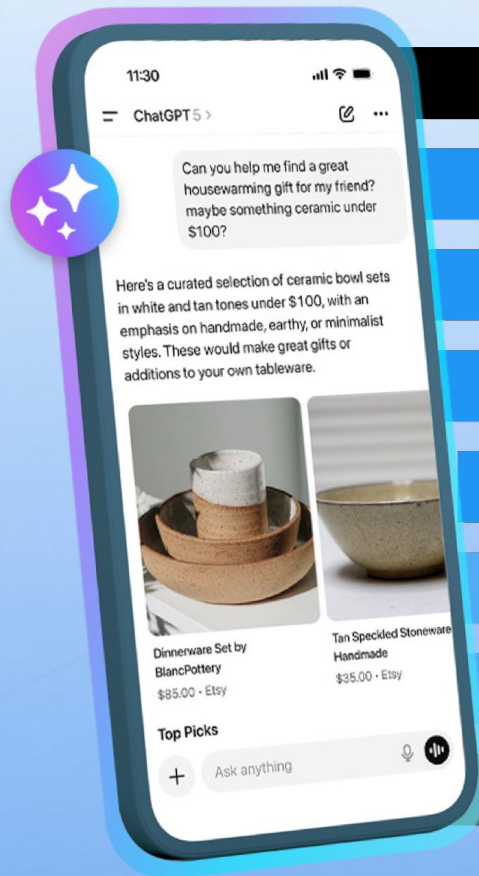
How are consumers using AI in their shopping journey?

AI is entering the shopping journey, but not the checkout... yet.

Over half (**58%**) of shoppers have used AI tools to research products

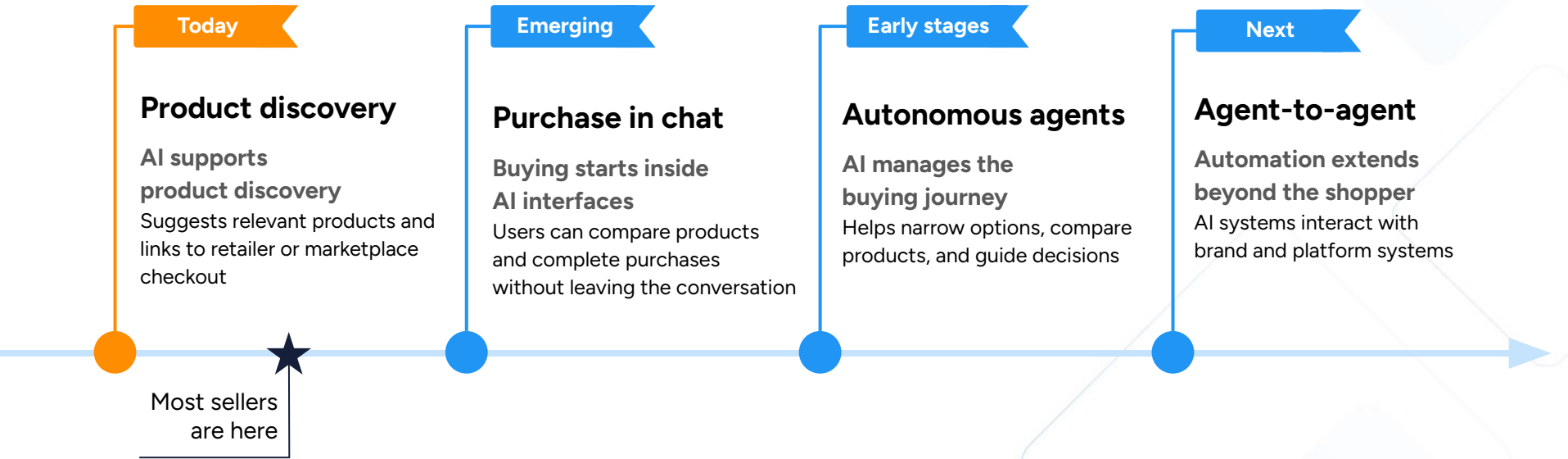
Shoppers trust AI for research and comparison, but not yet for completing purchases

It is worth noting that, when this research was conducted, instant AI checkout had only been available for about a month, and only in the US. So we're still very early in that evolution.



AI is starting to reshape how shoppers discover, compare, and choose products

How far along are we, really?





**Rational
Buying Decisions**



**Emotional
Buying Decisions**



Social becomes agentic

TikTok Rolls Out In-Feed AI Commerce



Conversational Agent

Context-aware real-time product guidance.



One-Click Checkout

Direct brand purchases inside feed.

New research, fresh insights

Marketplace Seller Trends

Report 2026



The second edition is officially out, with fresh research from 550 marketplace ecommerce decision-makers across France, Germany, the Netherlands, the UK, and the US.

Key brand shifts from 2025 to 2026	2025	2026
Sellers active on 7+ marketplaces	94%	Not measured
Sellers active on 3-5 marketplaces	Not measured	Not measured
Top priority: Expand to more marketplaces	84 (27%)	84 (27%)
Top priority: Boost profitability	82 (25%)	81 (25%)
Top priority: Improve product range	80%	80%
Sellers active on TikTok Shop	Top 8 in UK & US only	

Marketplace seller trends report 2026

How sellers are balancing marketplace growth, profitability, and performance

2nd edition just launched

Profit margin +12%

AI and profitability have overtaken expansion as seller's #1 priority

Selected top priorities for 12 months reflect a market in implementing AI and boosting profitability, alongside improving product range and increasing sales on existing marketplaces.

Rather than rapidly expand marketplaces, sellers are increasingly focused on existing operations, making them more profitable, and more

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Thank you



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