

An Original Research Report

The State of Agentic Commerce Adoption

Analysis from a 2026 survey of over 600 enterprise eCommerce leaders about agentic commerce attitudes, adoption, and impact.

Executive Summary

The market has made its decision. The only question is whether your infrastructure is ready.

95.5% of enterprise organizations surveyed report having deployed at least one AI-powered commerce capability, confirming that adoption is no longer theoretical or exploratory. This operational reality is matched by material financial commitment: **nearly half of enterprise decision makers (47.3%) expect to invest \$1M or more in agentic commerce initiatives within the next 12 months, with 21.1% planning investments exceeding \$5M.**

These investment levels signal that agentic commerce is being treated as a core transformation initiative, not a discretionary innovation experiment.

Return expectations reinforce this strategic posture. 45.0% expect ROI within 12 months, and 73.2% expect ROI within 24 months, signaling strong internal accountability for near-term performance.

Looking ahead, enterprise leaders expect agentic commerce to reshape transaction flows rapidly.

90.7% expect AI agents to influence at least 20% of online orders by 2027, and 36.5% expect AI to influence more than half of all transactions. Independent research from McKinsey projects up to \$1 trillion in US retail revenue from agentic commerce by 2030, while Morgan Stanley estimates \$190–385 billion in US ecommerce spending driven by AI agents in the same timeframe.

Only 12% cite leadership buy-in as a barrier, infrastructure is the bottleneck

67.2% rate 'order-network capabilities' as very or extremely important

56.5% plan to deploy AI shopping agents within 6 months

Crucially, the primary obstacles to scaling agentic commerce are infrastructural rather than cultural. Leadership buy-in is cited as a barrier by only 12.0% of respondents. The market is aligned on direction and value. Execution capability is now the differentiator.

Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026; McKinsey & Company. "The Agentic Commerce Opportunity." October 2025; Morgan Stanley Research. "Agentic Commerce Impact Could Reach \$385 Billion by 2030." 2025.

Findings That Matter

What 600 enterprise decision makers told us about agentic commerce:

95.5%

have deployed at least one AI capability.

AI is operational in enterprise ecommerce, not theoretical

47.3%

expect to invest \$1M+ in the next 12 months

Investment levels are material.

67.2%

rate order-network capabilities as very important.

The order network is the new imperative.

73.2%

expect positive ROI within 24 months.

ROI expectations are aggressive.

90.7%

expect AI to influence 20%+ of orders by 2027.

AI agent influence will be massive.

56.5%

plan AI shopping agents within 6 months.

Near-term urgency is real.

12%

cited leadership buy-in as an obstacle.

Infrastructure is the barrier, not mindset.

76.8%

identify as fast followers or measured adopters.

The market favors pragmatic adopters.

60.3%

of companies focusing on OpenAI/ChatGPT

Commercial LLMs dominate enterprise strategy.

44.8%

operate both B2B and B2C.

Hybrid commerce models lead adoption.

Table of Contents

CHAPTER I

Current State of Agentic Commerce 5

CHAPTER II

Investment and Strategic Posture 11

CHAPTER III

The Infrastructure Challenge 14

CHAPTER IV

The 2027 Horizon 16

CHAPTER V

Segment Deep Dives 17

Methodology and Demographics 23

Sources & Citations 24

About Logicbroker 25

CHAPTER I – THE CURRENT STATE OF AGENTIC COMMERCE

The Adoption Reality of AI in Enterprise eCommerce

Agentic commerce is not coming. It is here. Across the 600 enterprise ecommerce decision makers surveyed, 95.5% report having deployed at least one agentic commerce capability. Only 4.5% of respondents have no AI-driven commerce capabilities in place.

This level of adoption reflects a market that has moved decisively past experimentation. Customer-facing capabilities lead the deployment curve, with AI-powered product discovery (50.0%) and AI chatbots (48.5%) at the top. But operational capabilities, including pricing optimization (43.5%) and automated inventory management (42.5%), show that enterprises are already investing in back-office intelligence, not just front-end enhancements.

Independent research reinforces this trajectory. Adobe Analytics reports that AI-sourced traffic to US ecommerce sites surged 4,700% year-over-year in July 2025, while ChatGPT now processes an estimated 53 million shopping-related queries daily across its 800+ million weekly active users.

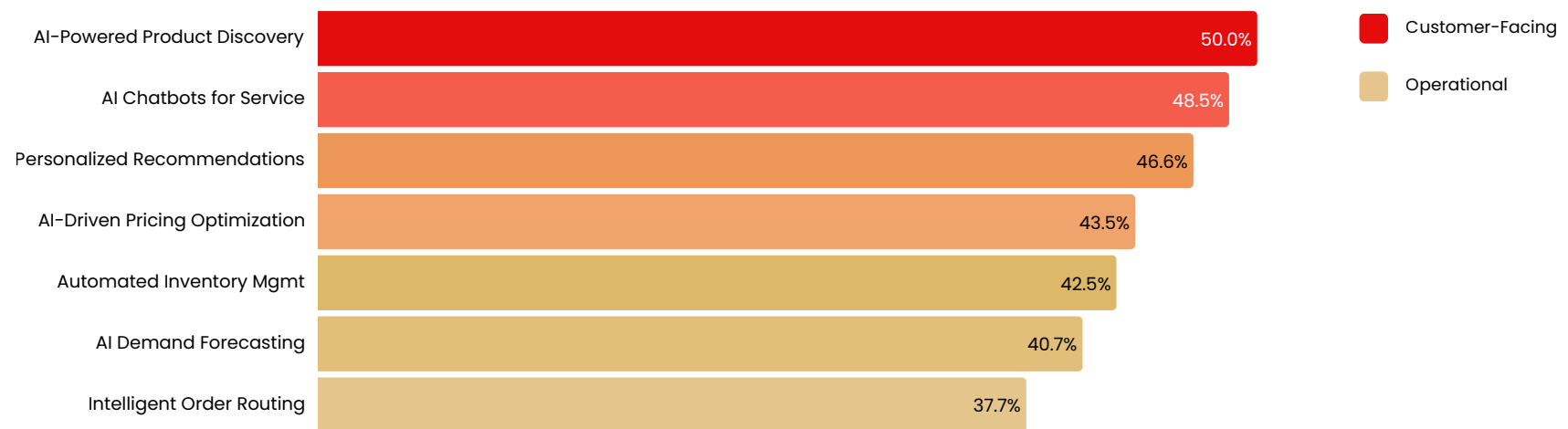
The question is no longer whether to adopt agentic commerce. It's how fast you can scale it.

KEY STAT

95.5%

have deployed at least one AI-powered commerce capability

CURRENTLY DEPLOYED AI-POWERED CAPABILITIES



Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026; Adobe Digital Insights. "Generative AI-Powered Shopping Rises with Traffic to U.S. Retail Sites." August 2025; Adobe Digital Insights. "AI Traffic Surges Across Industries, Retail Sees Biggest Gains." 2025 Holiday Season Report; Semrush. "We Studied the Impact of AI Search on SEO Traffic." June 2025; Digital Commerce 360. "McKinsey Forecasts Up to \$5 Trillion in Agentic Commerce Sales by 2030." October 2025.

Capability Maturity Spectrum

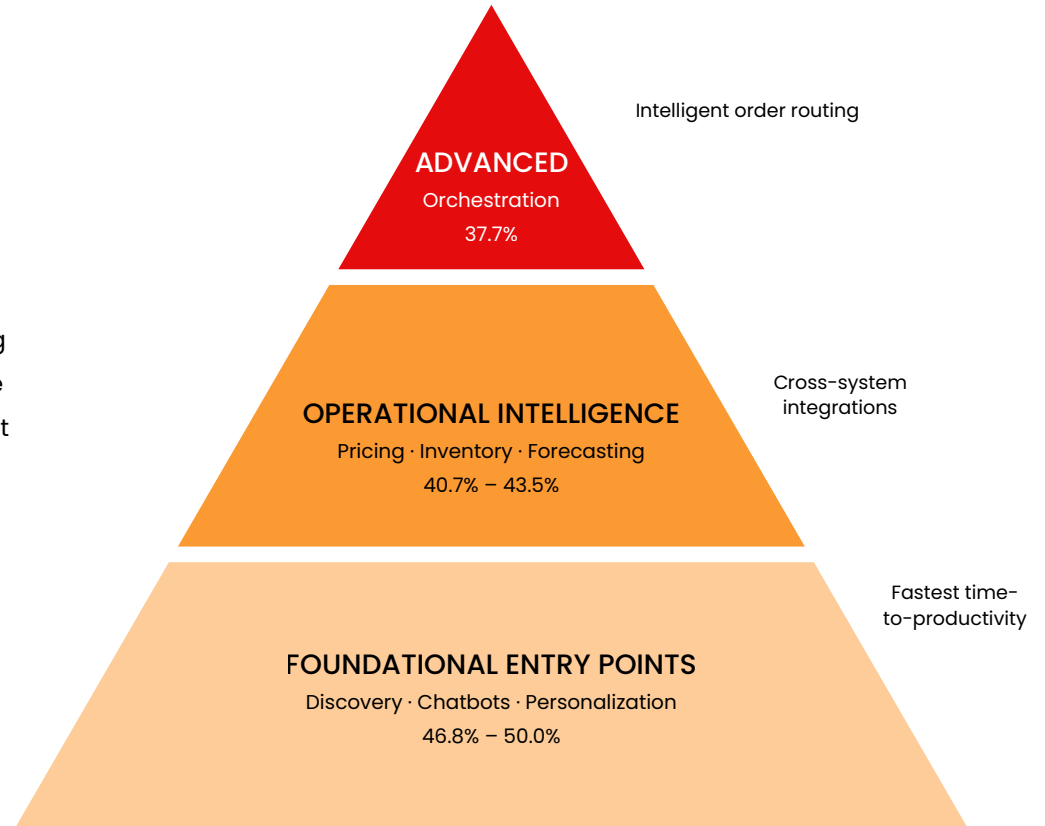
From foundational entry points to advanced orchestration

Current deployments reveal a clear maturity progression across the enterprise landscape. Customer-facing AI capabilities represent the most accessible entry points, with product discovery, chatbots, and personalized recommendations leading adoption. These capabilities deliver visible ROI quickly and require less back-end integration, making them natural starting positions.

The middle tier consists of operational intelligence capabilities: pricing optimization, inventory management, and demand forecasting. These require deeper data integration and cross-functional coordination, yet each exceeds 40% adoption, suggesting enterprises are willing to tackle complexity where value is demonstrable.

At the advanced end of the spectrum, intelligent order routing (37.7%) represents the frontier of agentic commerce maturity. This capability requires real-time orchestration across multiple systems, suppliers, and fulfillment nodes, and sits at the core of what makes commerce truly "agentic."

Despite greater integration complexity, operational capabilities show adoption rates within 13 points of customer-facing leaders. The gap is closing fast.



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Implementation Roadmaps

What organizations are prioritizing for the next 6 to 18 months

Near-term implementation plans reveal accelerating momentum across the enterprise landscape. More than half of organizations plan to deploy AI shopping agents (56.5%), predictive inventory analytics (53.0%), and automated order orchestration (51.5%) within six months.

These are not isolated pilots. When more than half the market is planning simultaneous deployment of multiple capabilities on a six-month timeline, it signals a coordinated wave of operational transformation. Organizations that delay risk falling behind not just early adopters, but the mainstream market.

Longer-horizon capabilities like AI-powered supplier management (32.8%) and autonomous reordering (30.0%) reflect the next phase of maturity, where AI moves from assisting human decisions to executing transactions independently.

PLANNED DEPLOYMENTS BY TIMELINE



WITHIN 6 MONTHS



WITHIN 12 MONTHS

Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026; McKinsey & Company. "The Agentic Commerce Opportunity." October 2025; Mordor Intelligence. "Agentic AI in Retail and eCommerce Market Size, Share & Growth Trends Report." July 2025.

When more than half the market plans simultaneous deployment of multiple capabilities in six months, this isn't experimentation. This is a deployment wave.

MARKET CONTEXT

AI-sourced traffic to US eCommerce sites surged 4,700% year-over-year in July 2025, and was expected to climb another 500% during the holiday season. The average LLM visitor is worth 4.4x more than a traditional organic search visitor based on conversion rates.

Sources: Adobe Analytics, 2025; Semrush AI Search Study, 2025

The LLM Platform Landscape

Where organizations are placing their bets

The enterprise market has consolidated around major commercial LLM platforms rather than building custom solutions. OpenAI/ChatGPT leads at 60.3%, followed closely by Google Gemini (55.3%) and Microsoft Copilot (54.7%). Only 14.8% of organizations are developing proprietary LLMs.

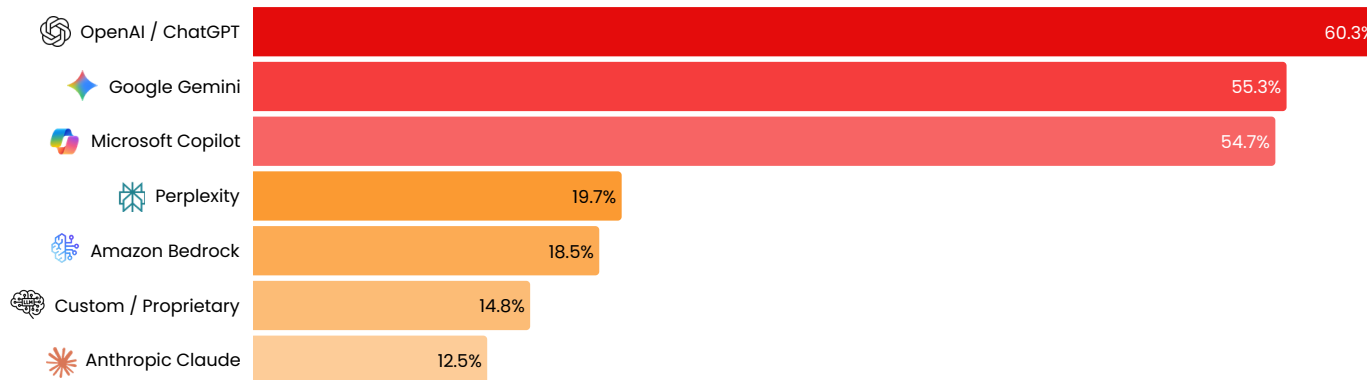
The percentages total well over 100%, confirming that multi-platform strategies are the norm. Enterprise organizations are not choosing a single AI partner; they are integrating across multiple platforms simultaneously. This approach reflects both the rapid evolution of LLM capabilities and the diversity of use cases across commerce operations.

This multi-platform reality has a direct implication for commerce infrastructure: any technology partner must support interoperability with all major LLM platforms. Proprietary lock-in to a single AI provider creates unacceptable risk in a market moving this quickly.

ChatGPT alone now serves 800 to 900 million weekly active users, processing approximately 2.5 billion prompts daily. An estimated 2.1% of those prompts involve purchasable product queries, translating to roughly 53 million shopping queries every day.

Only 14.8% are relying on custom LLMs. The rest leverage commercial platforms, validating open-network strategies that connect to any AI platform.

LLM PLATFORMS USED OR PLANNED FOR INTEGRATION



Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026; Digital Commerce 360. November 2025.

The Order Network Imperative

Why platform connectivity matters more than ever

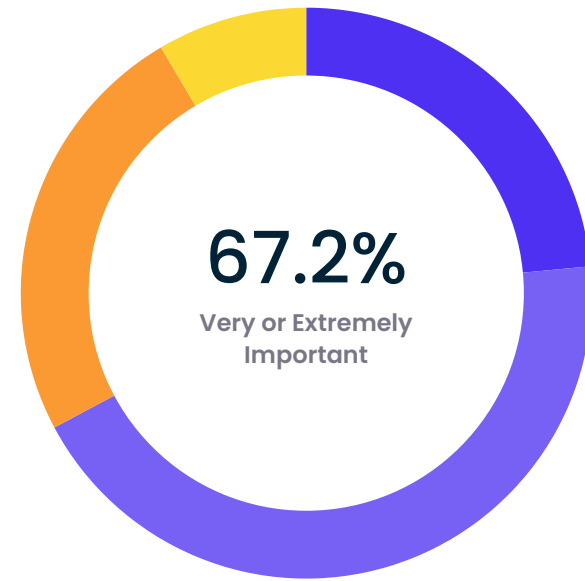
67.2% of enterprise decision makers rate order-network capabilities connecting AI agents, suppliers, and fulfillment partners as very or extremely important. Only 8.5% rated this as slightly or not important.

This finding validates a fundamental shift in how organizations think about commerce infrastructure. The market no longer views commerce platforms as transaction processors. It views them as intelligent networks that must coordinate real-time data flows across multiple parties: AI agents discovering products, suppliers providing inventory, logistics partners executing fulfillment, and systems reconciling financial outcomes.

Single-point solutions that optimize one node of the commerce chain are insufficient for the agentic era. When an AI agent commits to fulfilling a customer's request, it needs assurance that inventory exists, the price is current, the supplier can ship, and the delivery timeline is accurate. That requires an orchestration layer that connects every participant in real time.

As AI agents begin to transact on behalf of customers, they will demand partners who can offer fast, accurate, and reliable fulfillment infrastructure.

IMPORTANCE OF ORDER-NETWORK CAPABILITIES



- Extremely Important (23.5%)
- Very Important (43.7%)
- Moderately Important (24.3%)
- Slightly / Not Important (8.5%)

Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

CHAPTER II – INVESTMENT AND STRATEGIC POSTURE

Investment Levels

Nearly half of the enterprise market (47.3%) expects to invest \$1M or more in agentic commerce within the next 12 months.

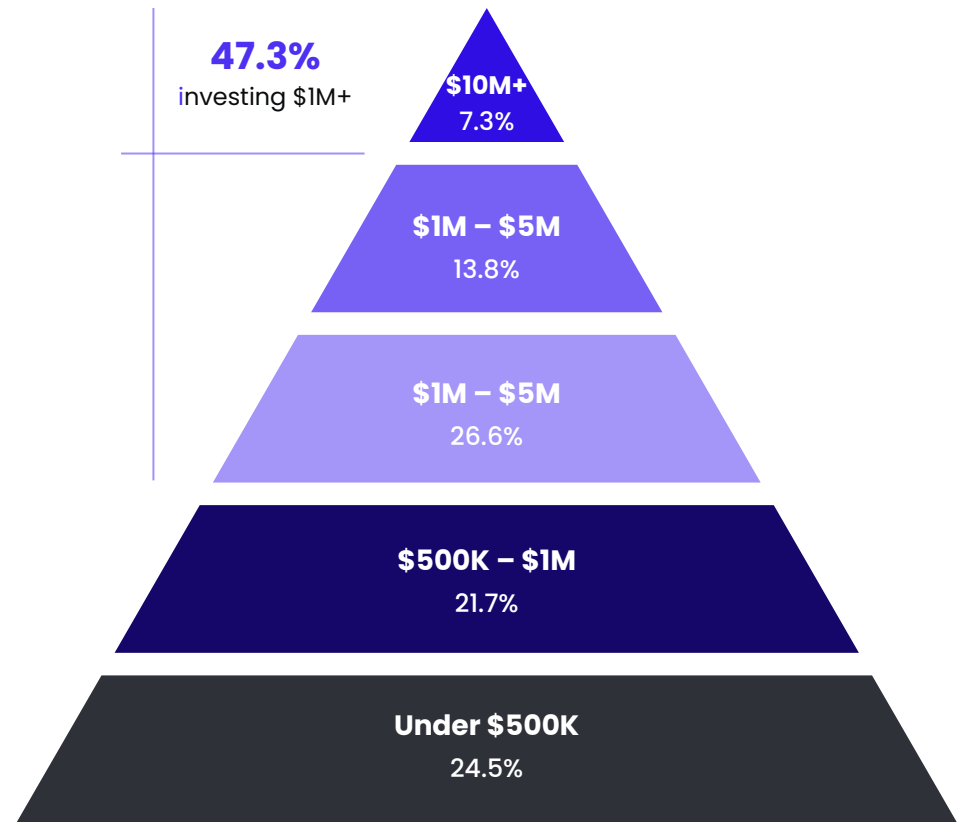
This is not experimental budget. This is strategic transformation spend allocated with the expectation of measurable returns.

At the highest tier, 7.3% are planning investments exceeding \$10M, and another 13.8% are budgeting between \$5M and \$10M. Combined, over one in five enterprises (21.1%) is committing \$5M+ to agentic commerce in the next year alone.

Only 7.7% plan to spend under \$100K, and just 6.5% have not yet determined their budget, a remarkably small fraction of undecided organizations for a market this nascent.

These investment levels seen from the respondents are consistent with broader market projections. McKinsey estimates the US retail market could see up to \$1 trillion in orchestrated revenue from agentic commerce by 2030, while Mordor Intelligence values the global agentic AI in retail market at \$46.74 billion in 2025, growing to \$218.37 billion by 2031.

SPEND ON AGENTIC COMMERCE OVER THE NEXT 12 MONTHS



Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026; McKinsey & Company. "The Agentic Commerce Opportunity." October 2025; Mordor Intelligence. "Agentic AI in Retail and eCommerce Market Size, Share & Growth Trends Report." July 2025.

Investment Drivers

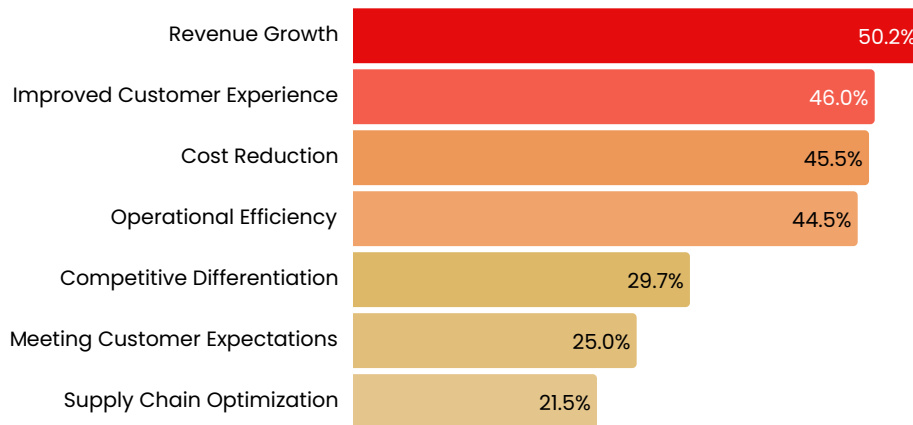
What's motivating enterprise spend

Revenue growth leads the motivation stack at 50.2%, followed closely by improved customer experience (46.0%), cost reduction (45.5%), and operational efficiency (44.5%). Competitive differentiation (29.7%) ranks notably lower, suggesting organizations view agentic commerce primarily as a performance lever rather than a positioning exercise.

This is a market driven by outcomes, not optics. When the top four drivers all relate to measurable business results, it signals mature budget allocation: these are investments being made with specific KPI targets attached, not exploratory R&D spend.

Supply chain optimization (21.5%) rounds out the driver set, pointing to a smaller but significant cohort focused on operational resilience and fulfillment capabilities. This aligns with the strong adoption of inventory management and demand forecasting capabilities identified in Part I.

MOTIVATIONS DRIVING INVESTMENT IN AGENTIC COMMERCE



Outcome-driven goals outweigh competitive positioning, confirming that agentic commerce is viewed as a performance lever, not a branding signal.

MARKET CONTEXT

Morgan Stanley estimates \$190 to \$385 billion in US ecommerce spending will be driven by AI agents by 2030, representing 10 to 20% of total ecommerce market share. 23% of Americans have already made AI-driven purchases in the past month.

Source: Morgan Stanley Insights, "Agentic Commerce Impact Could Reach \$385 Billion by 2030," 2025

Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026; Morgan Stanley Research. "Agentic Commerce Impact Could Reach \$385 Billion by 2030." 2025.

Strategic Posture & ROI Expectations

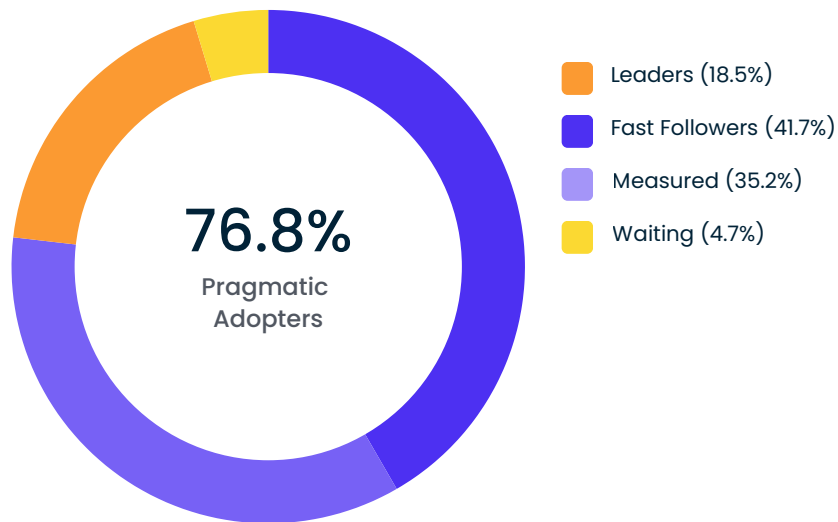
How the market positions itself and when it expects returns

Strategic Self-Identification

76.8% of enterprise organizations identify as 'pragmatic adopters': either fast followers (41.7%) who move quickly once value is proven, or measured/test-and-learn adopters (35.2%) who validate through structured pilots before scaling.

Only 18.5% position themselves as industry leaders pioneering new territory. This distribution has a direct implication for go-to-market strategies: the majority of the market wants proven solutions with reduced execution risk. They want case studies, not concepts. Benchmarks, not buzzwords.

ENTERPRISE AGENTIC COMMERCE ADOPTION ATTITUDES

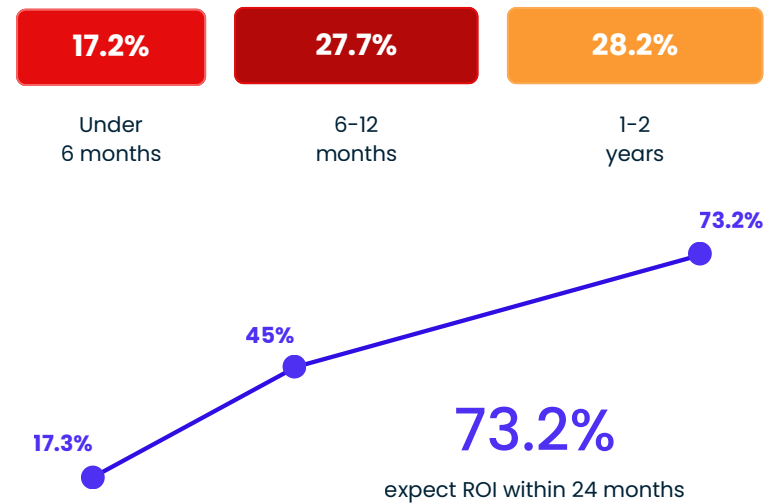


ROI Timeline Expectations

45.0% expect ROI within 12 months. 73.2% expect it within 24 months. Only 4.7% are uncertain about their return timeline, and a mere 0.7% say ROI is not a consideration.

These aggressive timelines reflect mature internal business cases. Organizations investing at these levels with these return expectations have clear performance targets, executive sponsorship, and measurement frameworks already in place.

EXPECTATIONS FOR AGENTIC COMMERCE ROI REALIZATION



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Success Metrics

How organizations will measure agentic commerce performance

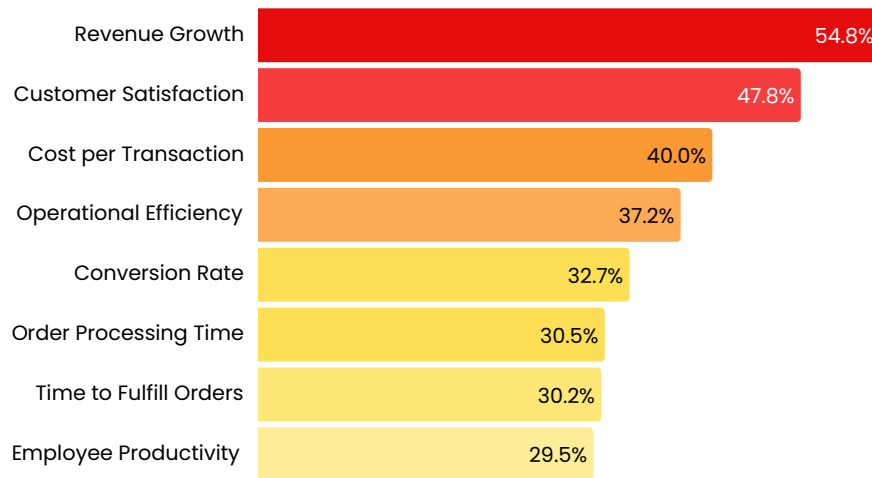
Revenue growth (54.8%) leads the success measurement hierarchy, followed by customer satisfaction scores (47.8%) and cost per transaction (40.0%). This blend of top-line, customer-centric, and efficiency metrics suggests organizations are building balanced scorecards rather than optimizing for a single outcome.

Operational efficiency gains (37.2%) and conversion rate improvement (32.7%) round out the top five, reinforcing that the market views agentic commerce as both a revenue driver and an operational lever. The inclusion of order processing time reduction (30.5%) and time to fulfill orders (30.2%) signals growing attention to the fulfillment side of the commerce equation.

Higher-investment organizations show greater emphasis on revenue and operational metrics, reflecting increased accountability that comes with larger budget commitments.

Revenue growth and customer satisfaction dominate the scorecard, but fulfillment metrics are gaining prominence as organizations recognize the operational demands of agentic commerce.

HOW THE IMPACT OF AGENTIC COMMERCE INVESTMENT IS BEING MEASURED



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

CHAPTER III - THE INFRASTRUCTURE CHALLENGE

Barriers to Scaling Agentic Commerce

The barriers to agentic commerce adoption are overwhelmingly technical and infrastructural, not organizational or cultural. Security and privacy concerns lead at 42.5%, followed by data quality issues (40.2%) and integration complexity (36.3%). Leadership buy-in registers at just 12.0%, the lowest barrier on the list.

This finding rewrites the typical enterprise transformation narrative. In most digital initiatives, leadership alignment and organizational change management rank as top barriers. In agentic commerce, the C-suite is already convinced. The challenge is execution: connecting systems, cleaning data, ensuring security, and building integration bridges between AI platforms and commerce infrastructure.

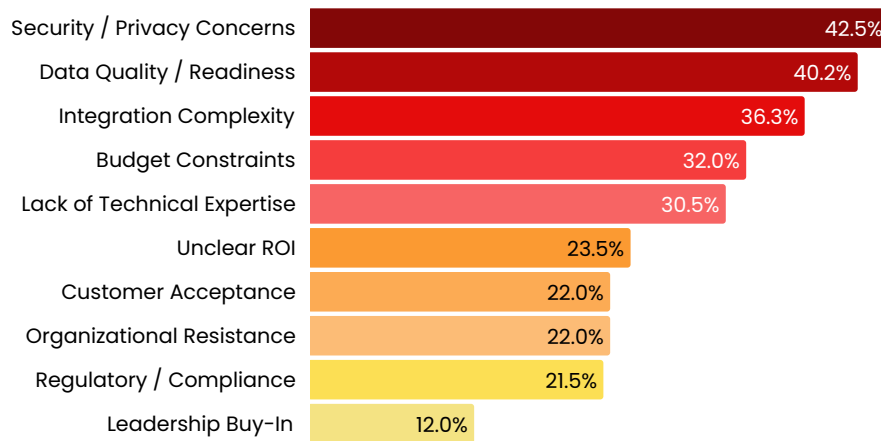
This has direct implications for technology partner selection. The market does not need more evangelism about agentic commerce potential. It needs platforms that reduce integration complexity, improve data readiness, and solve the security challenges that come with AI-powered transaction flows.

Only 12%

cite leadership buy-in as barrier

The C-suite is already convinced. The challenge is connecting the systems, cleaning the data, and building the integration bridges.

THE INFRASTRUCTURE & TECHNOLOGY BARRIERS TO ADOPTING AGENTIC COMMERCE



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

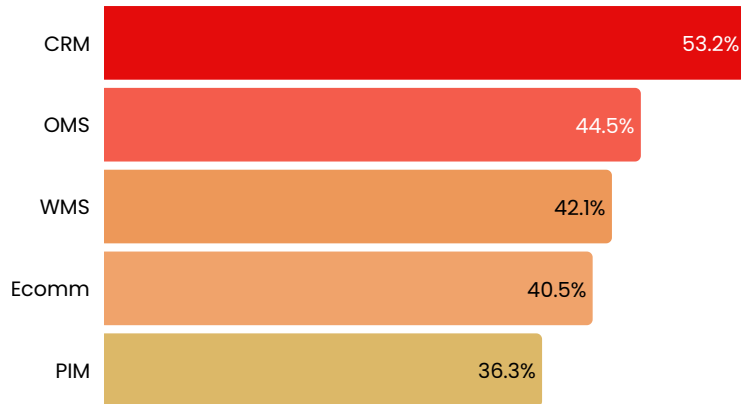
Integration Priorities & Adoption Accelerators

The systems that must connect and what would speed adoption

Systems Critical to Connect

CRM leads the integration priority list at 53.2%, reflecting the importance of maintaining customer relationships as AI agents become primary shopping interfaces. OMS (44.5%), WMS (41.2%), eCommerce platforms (40.5%), and PIM (36.3%) follow, collectively painting a picture of the system integration burden organizations face.

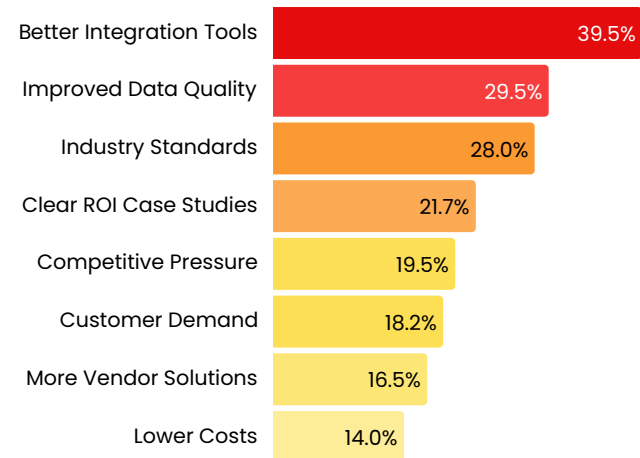
This integration priority stack explains why complexity ranks as the third-highest barrier. Connecting five or more core systems, each with different data models and update cadences, to a real-time AI orchestration layer is a significant technical undertaking. Organizations need integration partners that reduce this burden, not increase it.



What Would Accelerate Adoption

Better integration tools and platforms (39.5%) lead the accelerator list, followed by improved data quality (29.5%) and industry standards for AI commerce (28.0%). These top three accelerators directly mirror the top three barriers, confirming that the market has a clear-eyed view of its own challenges.

Notably, "lower costs" ranks last at 14.0%. Price is not the primary obstacle. Capability is. Organizations are willing to invest at significant levels when they believe the integration complexity and data readiness challenges can be solved.



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

PART IV - THE 2027 HORIZON

What Enterprise Leaders Expect within Two Years

90.7%

expect AI agents to influence at least 20% of online orders by 2027

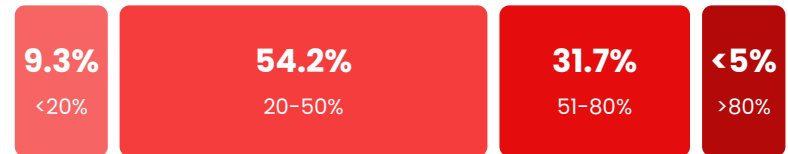
36.5% expect AI to influence more than half of all transactions

This is the report's most forward-looking finding, and arguably its most consequential. Within two years, the overwhelming majority of enterprise leaders expect AI agents to materially reshape how orders flow through their systems.

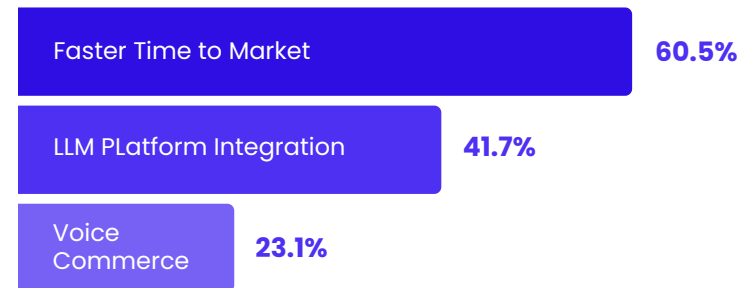
The distribution tells a nuanced story: 54.2% expect AI to influence between 20% and 50% of orders, a significant but manageable share. But 31.7% expect 51% to 80% influence, and 4.8% expect AI agents to influence more than 80% of their transaction volume. Only 9.3% expect AI influence to remain below 20%.

These projections align with third-party forecasts. Bain & Company projects agentic AI could account for 15 to 25% of US online retail by 2030, while McKinsey compares the impact to the web and mobile revolutions but expects even faster adoption curves.

EXPECTED AI INFLUENCE ON ORDERS BY 2027



TOP PLATFORM CAPABILITIES BEING PRIORITIZED



Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026; Bain & Company via Digital Commerce 360. "Agentic AI Could Account for 25% of U.S. Ecommerce Sales by 2030." December 2025; McKinsey & Company. "The Agentic Commerce Opportunity." October 2025.

Source: Logicbroker/Midsail Research "The State of Agentic Commerce Adoption", 2026;

PART V – SEGMENT DEEP DIVES

B2B, Retail, and Hybrid Organization Approaches to AI

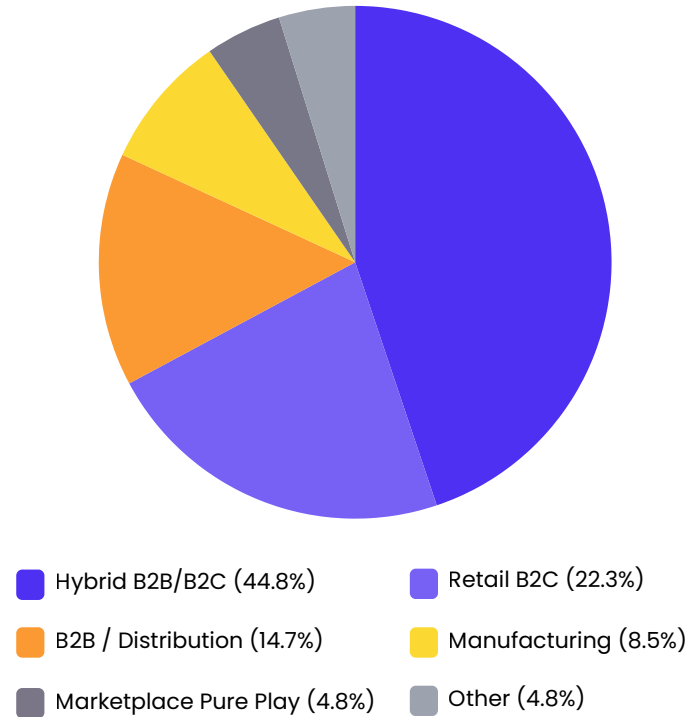
The Market Composition

The respondent breakdown challenges traditional market segmentation. Hybrid organizations operating both B2B and B2C dominate at 44.8%, nearly double the next largest segment. Pure retail represents 22.3%, while B2B commerce and distribution accounts for 14.7%.

This composition validates a critical market insight: most enterprise commerce organizations no longer fit neatly into B2B or B2C categories. The hybrid reality demands commerce infrastructure that can serve both models simultaneously, with unified data, shared inventory visibility, and flexible fulfillment orchestration.

Manufacturing with direct sales (8.5%) and marketplace operators (4.8%) represent smaller but strategically important segments, each with distinct agentic commerce requirements and opportunities.

BUSINESS MODEL OF SURVEY RESPONDENTS



REVENUE DISTRIBUTION OF RESPONDENTS



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Segment Characteristics

What each business model brings to the agentic commerce landscape



Hybrid B2B/B2C

44.8%

The dominant segment. Navigates dual complexity: consumer-facing discovery alongside B2B workflows with negotiated pricing, approval chains, and EDI. Demands platforms that orchestrate fundamentally different transaction types through unified infrastructure.

Key need: Unified orchestration across both B2B and B2C channels



Retail (B2C)

22.3%

Faces the most immediate AI disruption. When agents discover, compare, and purchase autonomously, traditional SEO and paid acquisition face structural decline. Must prioritize agent-accessible structured data and machine-readable product catalogs.

Key need: Structured data accessibility for AI agent discovery



B2B Commerce

14.7%

Distinct operational realities: longer sales cycles, complex approval workflows, negotiated pricing, and established EDI relationships. Priorities center on inventory orchestration, supplier management, and demand prediction over consumer-facing personalization.

Key need: Intelligent order routing and supplier orchestration



Manufacturing

8.5%

Expanding beyond wholesale into direct-to-consumer, creating multi-channel complexity. AI agents offer direct consumer discovery bypassing retail intermediaries. Must connect production systems (ERP, MES) to commerce infrastructure across the most fragmented data ecosystems.

Key need: Production-to-commerce connectivity

Hybrid B2B/B2C Organizations

The dominant segment navigating dual-channel complexity

At 44.8% of respondents, hybrid organizations are the single largest segment in enterprise commerce – nearly double pure retail. They simultaneously manage consumer-facing discovery and personalization alongside B2B workflows with negotiated pricing, complex approvals, and EDI relationships. This dual complexity makes them the most demanding adopters of agentic commerce and the most likely to derive outsized value.

The compounding integration challenge is distinct: hybrids must connect not just AI agents and suppliers, but two fundamentally different commerce paradigms through unified infrastructure. CRM priority (53.2% overall) likely skews higher here, spanning individual consumers and multi-contact business accounts. Order-network capabilities (67.2% rate as very or extremely important) map directly to the hybrid need for intelligent routing across B2B and B2C fulfillment paths.

Hybrid organizations don't need two AI strategies. They need one intelligent network that orchestrates across both B2B and B2C, unifying what has historically been managed as parallel operations.

DUAL-CHANNEL COMPLEXITY MAP

B2C CHANNEL DEMANDS

- AI product discovery & search
- Real-time personalization
- Agent-accessible structured data
- Consumer-grade CX expectations
- LLM shopping agent readiness

B2B CHANNEL DEMANDS

- Negotiated pricing & contracts
- Multi-stakeholder approvals
- EDI & legacy integration
- Complex fulfillment routing
- Supplier network management

SHARED INFRASTRUCTURE REQUIREMENTS

- Unified inventory visibility across all channels
- Single order orchestration layer for all transaction types
- Cross-channel analytics and demand forecasting
- Multi-format connectivity (API, EDI, MCP, web portal)

Source: Logicbroker/Midsail Research "The State of Agentic Commerce Adoption in Enterprises", 2026;

Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Retail (B2C) Organizations

The segment facing the most immediate AI disruption

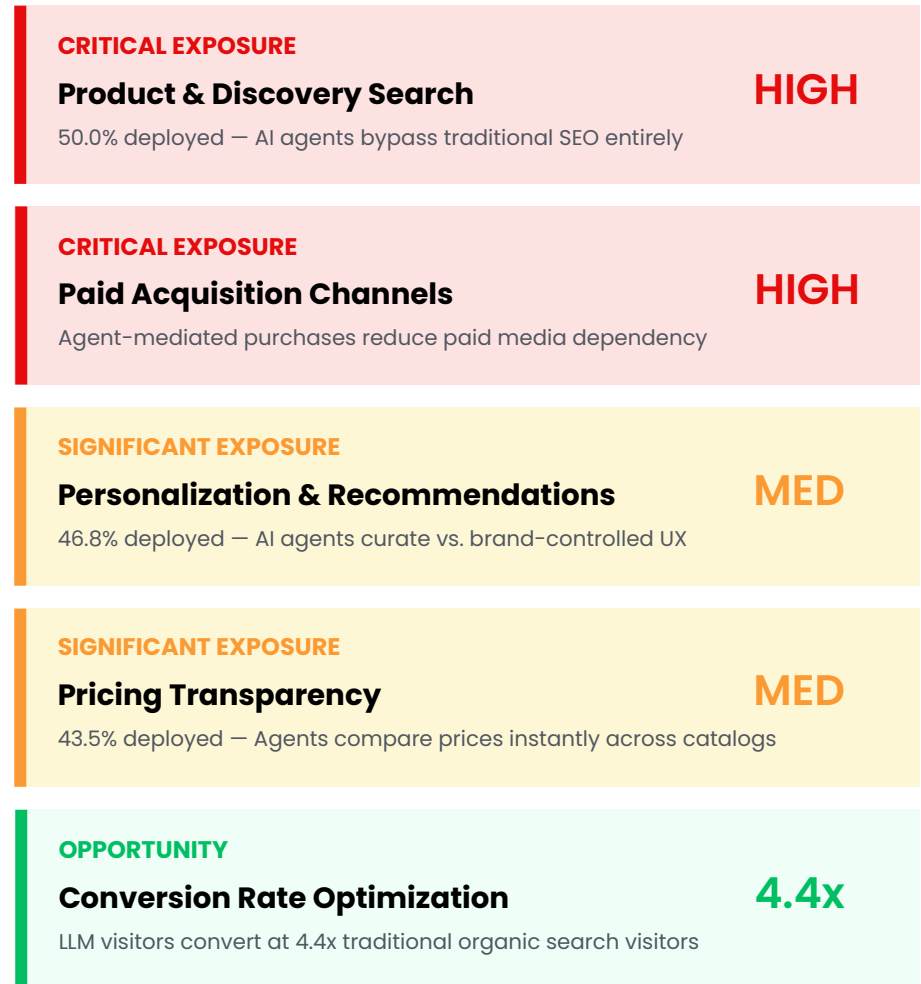
Pure retail organizations (22.3% of respondents) face the most immediate disruption from agentic commerce. When AI agents discover, compare, and purchase products autonomously, the acquisition funnel retail has optimized for two decades faces structural transformation. Traditional SEO and paid search strategies will see diminishing returns as agent-mediated transactions bypass conventional discovery paths entirely.

AI-powered product discovery leads current deployments at 50.0%, but retailers must now ensure catalogs are structured for machine-readable consumption, not just human browsing. The 4,700% surge in AI-sourced traffic (Adobe) confirms this shift is underway. Agent-mediated experiences are both a threat (loss of brand control) and an opportunity — LLM visitors convert at 4.4x traditional organic search, suggesting prepared retailers will capture disproportionate value.

Retailers who make their product data structured, accurate, and agent-accessible will capture disproportionate share of the 53 million daily AI shopping queries.

Sources: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption," 2026; Adobe Digital Insights. "Generative AI-Powered Shopping Rises with Traffic to U.S. Retail Sites." August 2025; Semrush. "We Studied the Impact of AI Search on SEO Traffic." June 2025.

AI DISRUPTION EXPOSURE FOR RETAIL



Source: Logicbroker/Midsail Research "The State of Agentic Commerce Adoption", 2026;

B2B Commerce & Distribution

Operational orchestration over consumer-facing flash

B2B commerce and distribution (14.7% of respondents) follows a fundamentally different agentic roadmap than retail. These organizations manage longer sales cycles, multi-stakeholder approvals, negotiated pricing, and deeply established EDI relationships. Their priorities center on operational intelligence rather than consumer-facing discovery.

Intelligent order routing (37.7% deployed) maps directly to the core B2B challenge of orchestrating complex orders across distributed supply networks. For B2B, agentic commerce means AI systems autonomously managing reorder points, optimizing supplier selection, and predicting demand — not helping consumers find products. AI-powered supplier management (32.8% planned) and autonomous reordering (30.0%) represent the next wave, addressing workflows that consume disproportionate time in B2B: PO management, supplier performance monitoring, and demand-driven replenishment.

For B2B, agentic commerce is less about shopping agents and more about operational intelligence — AI that manages suppliers, predicts demand, and routes orders autonomously.

B2B OPERATIONAL PRIORITIES BY URGENCY



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Manufacturing with Direct Sales

The emerging direct-to-everywhere opportunity

Manufacturers with direct sales (8.5% of respondents) are undergoing fundamental channel transformation – expanding beyond wholesale and distribution to sell directly to end customers. This creates a multi-channel reality demanding new orchestration capabilities that connect production systems to commerce infrastructure.

Agentic commerce offers a dual opportunity: AI-powered demand forecasting (40.7% deployed) becomes more valuable when manufacturers combine distribution sell-through data with direct-channel signals, while AI shopping agents can surface manufacturer storefronts directly to consumers, bypassing retail intermediaries. The integration challenge is acute – connecting ERP and MES systems to commerce platforms across the most fragmented data ecosystems of any segment.

Manufacturers who connect production systems to agentic commerce infrastructure gain the rarest competitive advantage: real-time visibility from factory floor to consumer doorstep.

MANUFACTURING AGENTIC READINESS SCORECARD



Methodology and Demographics

Research design and respondent profile

Research Methodology 👤

<p>CONDUCTED BY Midsail Research & On-Call CMO</p> <p>FIELD DATES November - December 2025</p> <p>RESPONDENT QUALIFICATION Enterprise ecommerce decision makers at organizations with \$11M to \$1B+ in annual ecommerce revenue</p>	<p>COMMISSIONED BY Logicbroker</p> <p>SAMPLE SIZE n = 600</p>
---	---

The survey was designed to capture a representative cross-section of enterprise ecommerce organizations across business models, revenue tiers, and functional roles. Questions covered current AI capability deployments, planned investments, implementation timelines, barrier assessments, LLM platform strategies, ROI expectations, and strategic self-identification.

Data was weighted to ensure proportional representation across revenue tiers and business models. All percentages reported reflect stratified results unless otherwise noted.

THE 12 RESEARCH DIMENSIONS EXPLORED



Source: Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026.

Sources & Citations

External research referenced in this report

CITE THIS REPORT

Logicbroker/Midsail Research. "The State of Agentic Commerce Adoption." 2026: 2026 Market Research Report.

Logicbroker, Inc. survey of 600+ enterprise ecommerce decision-makers at organizations with \$11M-\$1B+ in annual ecommerce revenue about agentic commerce attitudes, adoption, and impact.

Industry & Market Research

1. McKinsey & Company. "[The Agentic Commerce Opportunity: How AI Agents Are Ushering in a New Era for Consumers and Merchants.](#)" October 2025.
2. Morgan Stanley Research. "[Agentic Commerce Impact Could Reach \\$385 Billion by 2030.](#)" 2025.
3. Bain & Company via Digital Commerce 360. "[Agentic AI Could Account for 25% of U.S. Ecommerce Sales by 2030.](#)" December 2025.
4. Mordor Intelligence. "[Agentic AI in Retail and eCommerce Market Size, Share & Growth Trends Report.](#)" July 2025.

Traffic, Conversion & Consumer Behavior Data

5. Adobe Digital Insights. "[Generative AI-Powered Shopping Rises with Traffic to U.S. Retail Sites.](#)" August 2025.
6. Adobe Digital Insights. "[AI Traffic Surges Across Industries, Retail Sees Biggest Gains.](#)" 2025 Holiday Season Report.
7. Semrush. "[We Studied the Impact of AI Search on SEO Traffic. Here's What We Learned.](#)" June 2025.

Coverage & Analysis

8. Digital Commerce 360. "[McKinsey Forecasts Up to \\$5 Trillion in Agentic Commerce Sales by 2030.](#)" October 2025.
9. Digital Commerce 360. "[Morgan Stanley: AI 'Agentic Shoppers' Could Drive \\$385 Billion in Online Sales.](#)" December 2025.

About Logicbroker

The Agentic Commerce Orchestration Engine

Smarter connections, faster operations, better outcomes

Commerce is more complex than ever. AI agents are reshaping discovery. Supply chains span continents. Customers expect instant, accurate fulfillment across every channel.

Logicbroker is the Agentic Commerce Orchestration Engine that solves this complexity. We combine deep industry expertise, customer-driven innovation, an expansive partner ecosystem, and a native seller network into a single intelligent platform. The result: enterprise brands that move faster, connect smarter, and own every moment from product discovery to final delivery.



Learn more at logicbroker.com or contact us at info@logicbroker.com.