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Centre for Marketing Innovation | Amsterdam University of Applied Sciences

The Future of E-commerce in the Era of AI: From Cross-Border Growth to AI-Driven Discovery



Jesse Weltevreden

Professor Digital Commerce

Amsterdam University of Applied Sciences

Three questions for today

01 **Where does European e-commerce stand?**
Growth, country differences, opportunities and challenges

02 **How is AI changing online shopping?**
Discovery, visibility, and agentic AI

03 **How to expand internationally with AI?**
Market opportunities, customers, and operations

Where does European e-commerce stand?

The European E-commerce Report 2026

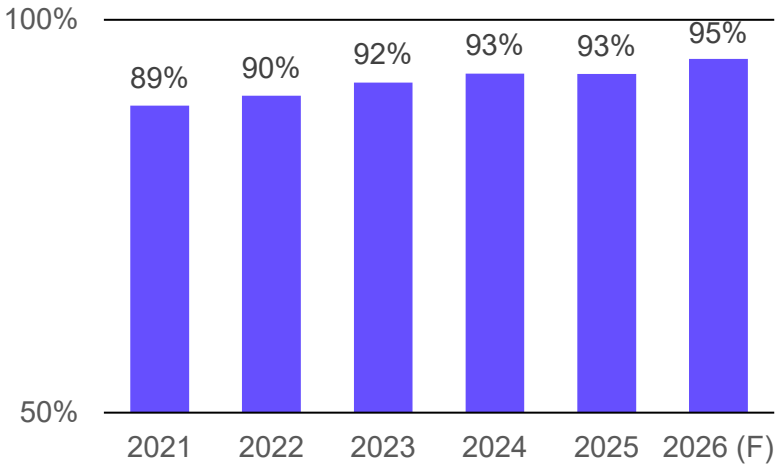


Countries included:

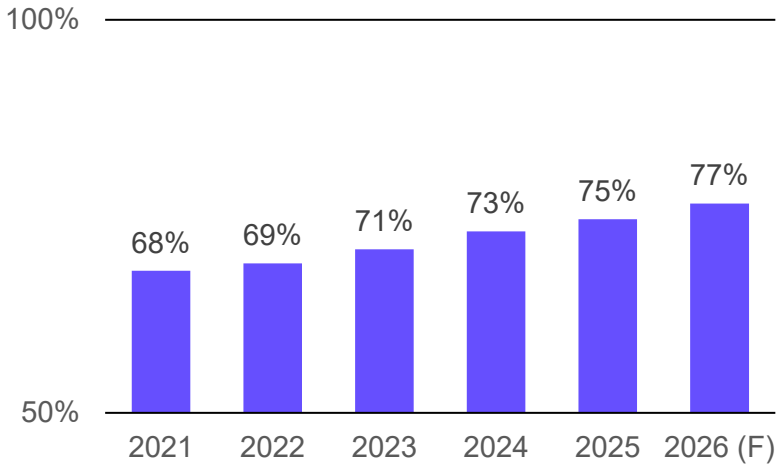
Albania
Austria
Belgium
Bosnia & Herzegovina
Bulgaria
Croatia
Cyprus
Czech Republic
Denmark
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Luxembourg
Malta
Moldova
Montenegro
Netherlands
North Macedonia
Norway
Poland
Portugal
Romania
Serbia
Slovak Republic
Slovenia
Spain
Sweden
Switzerland
United Kingdom
Ukraine

Internet usage and online shopping in Europe

Percentage of the population aged 16-74 accessing the internet

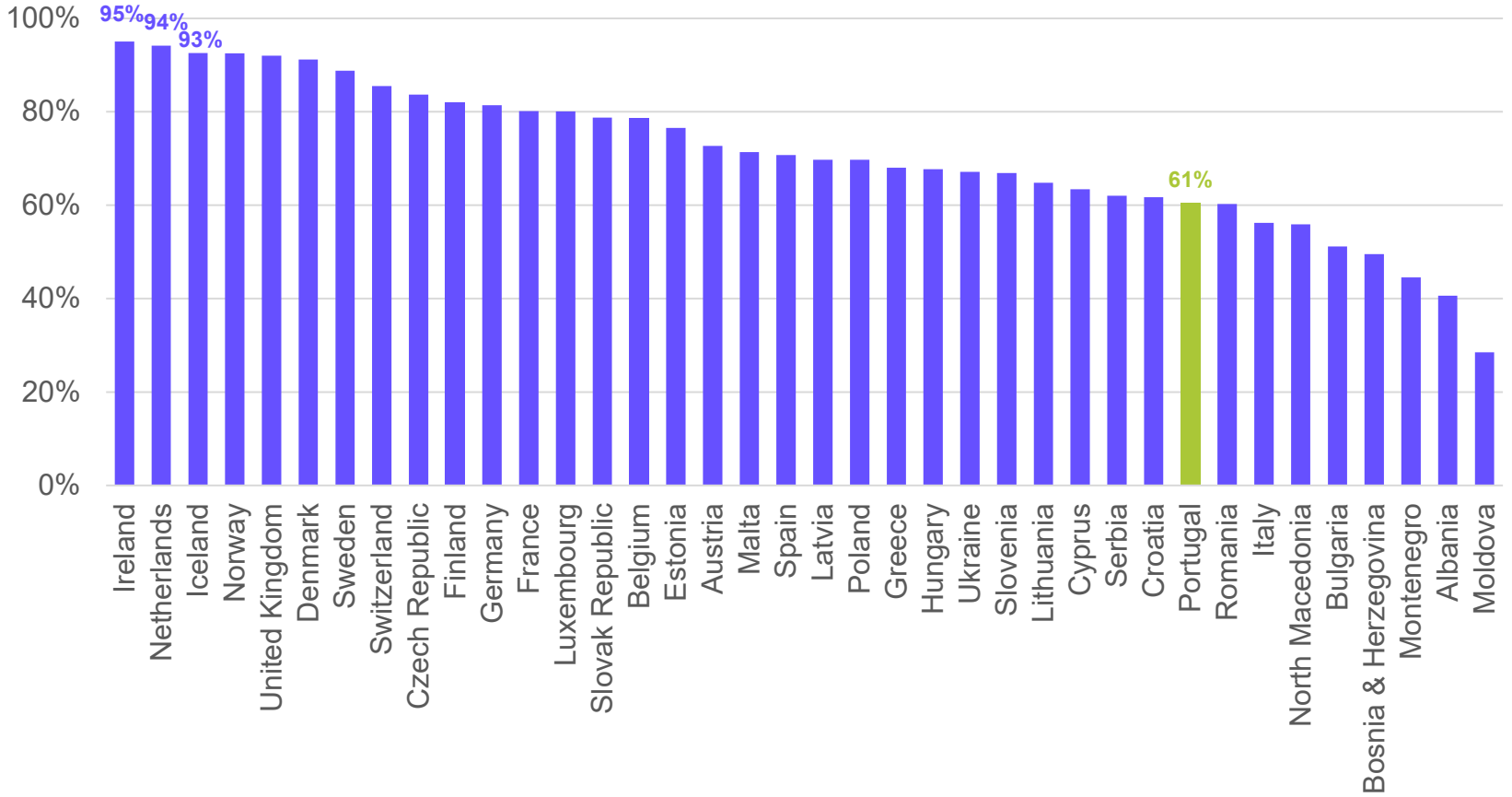


Percentage of the population aged 16-74 who bought goods and services online



Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

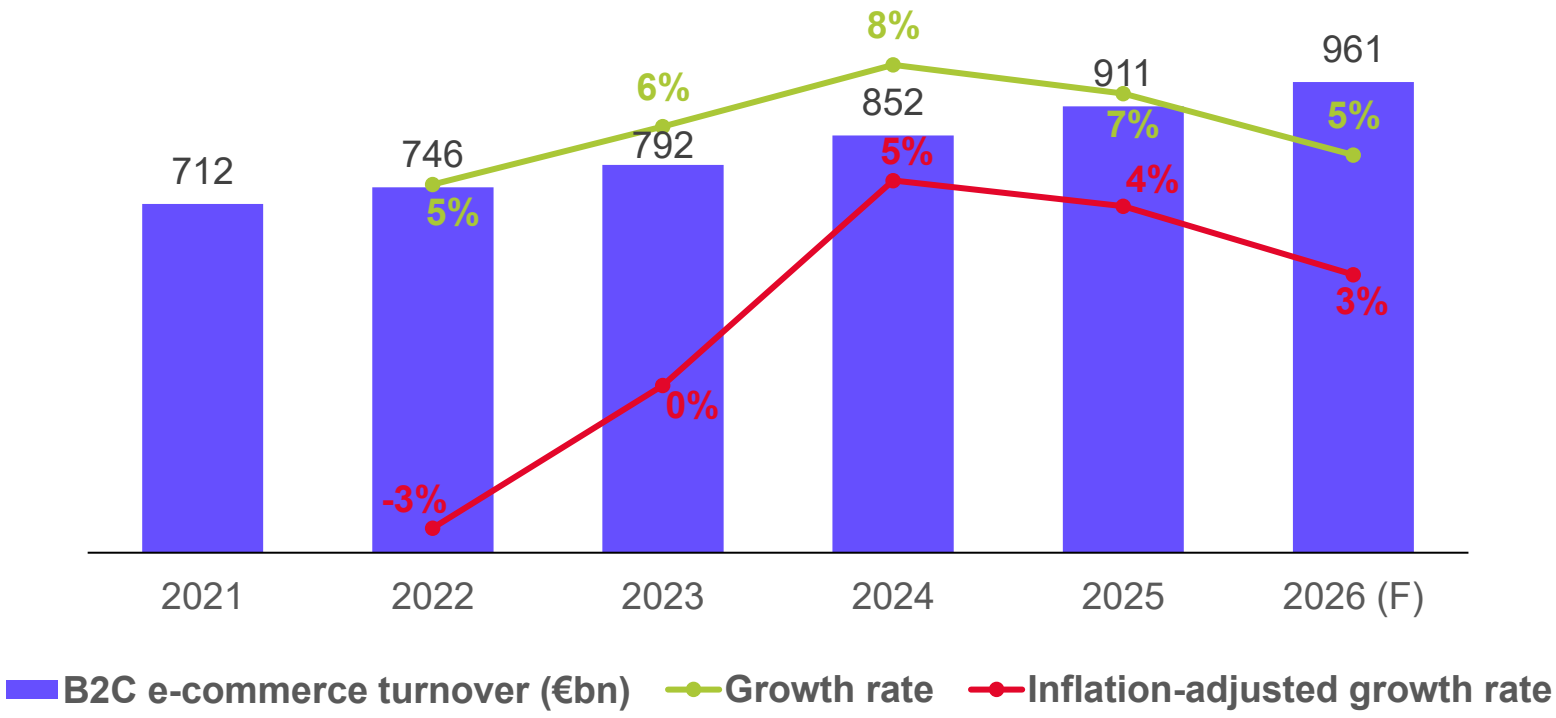
E-shoppers by country (in %), 2025*



* Percentage of the population aged 16-74 who bought goods and services online

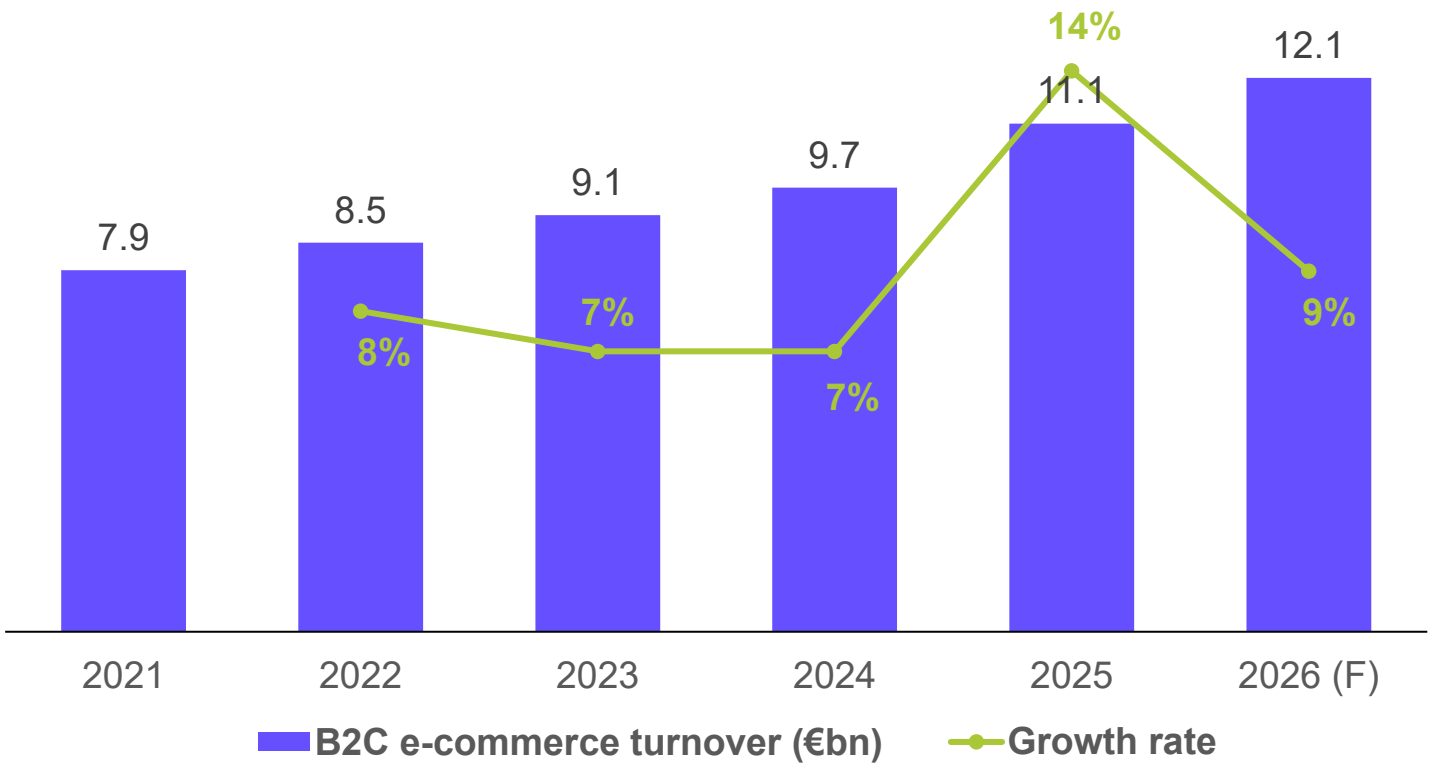
Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

B2C e-commerce turnover: Europe



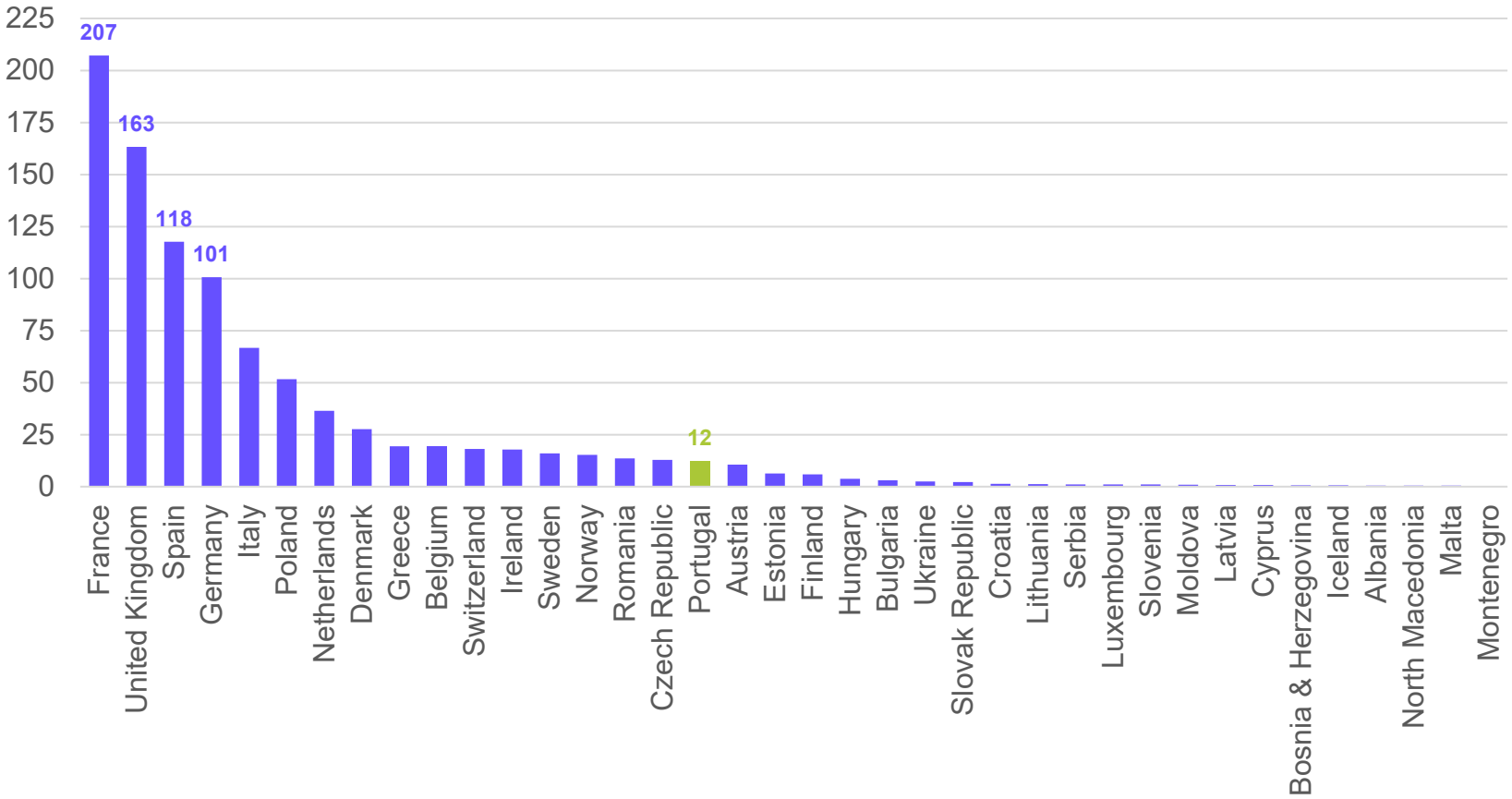
Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

B2C e-commerce turnover: Portugal



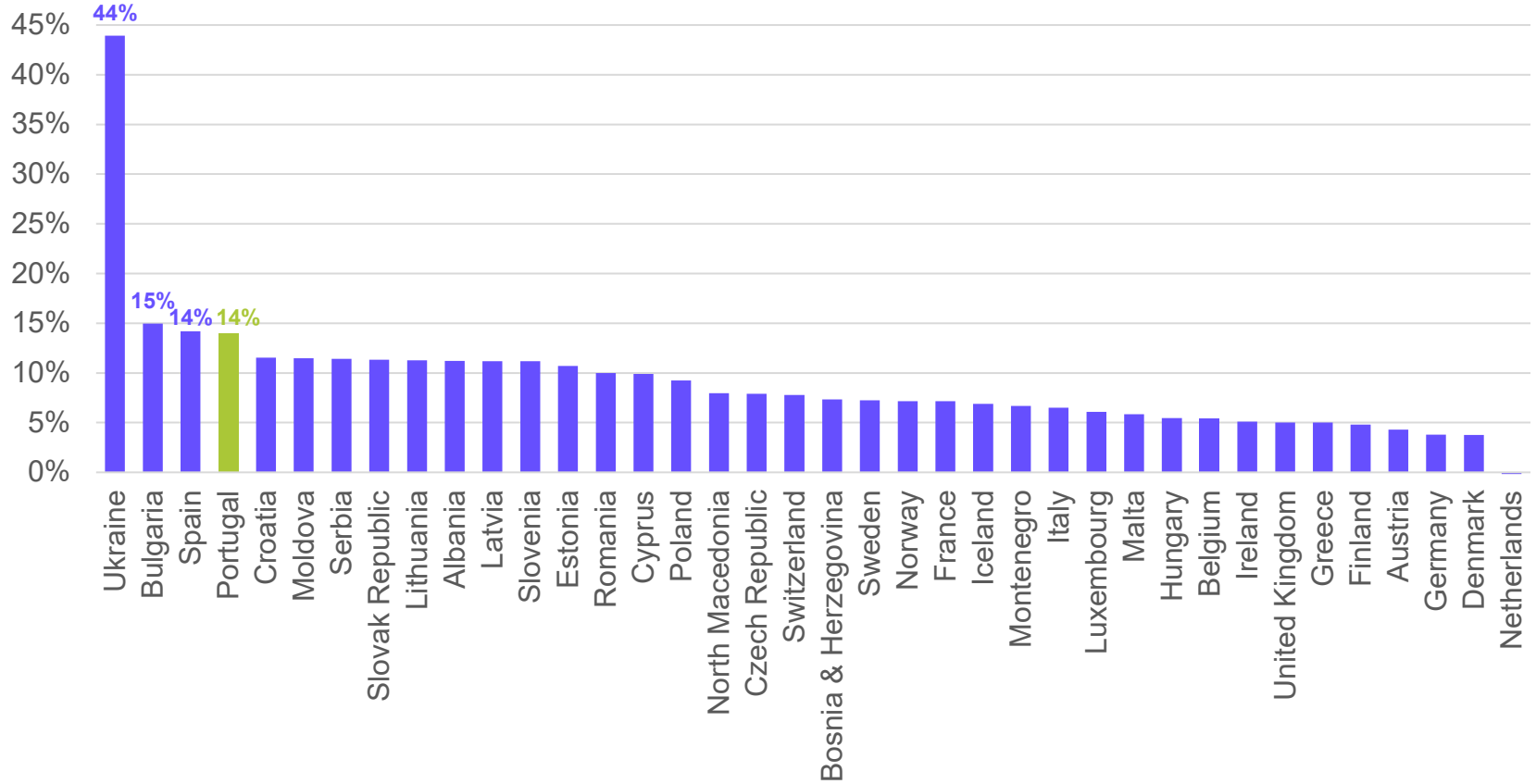
Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

B2C e-commerce turnover in Europe by country (€bn), 2025



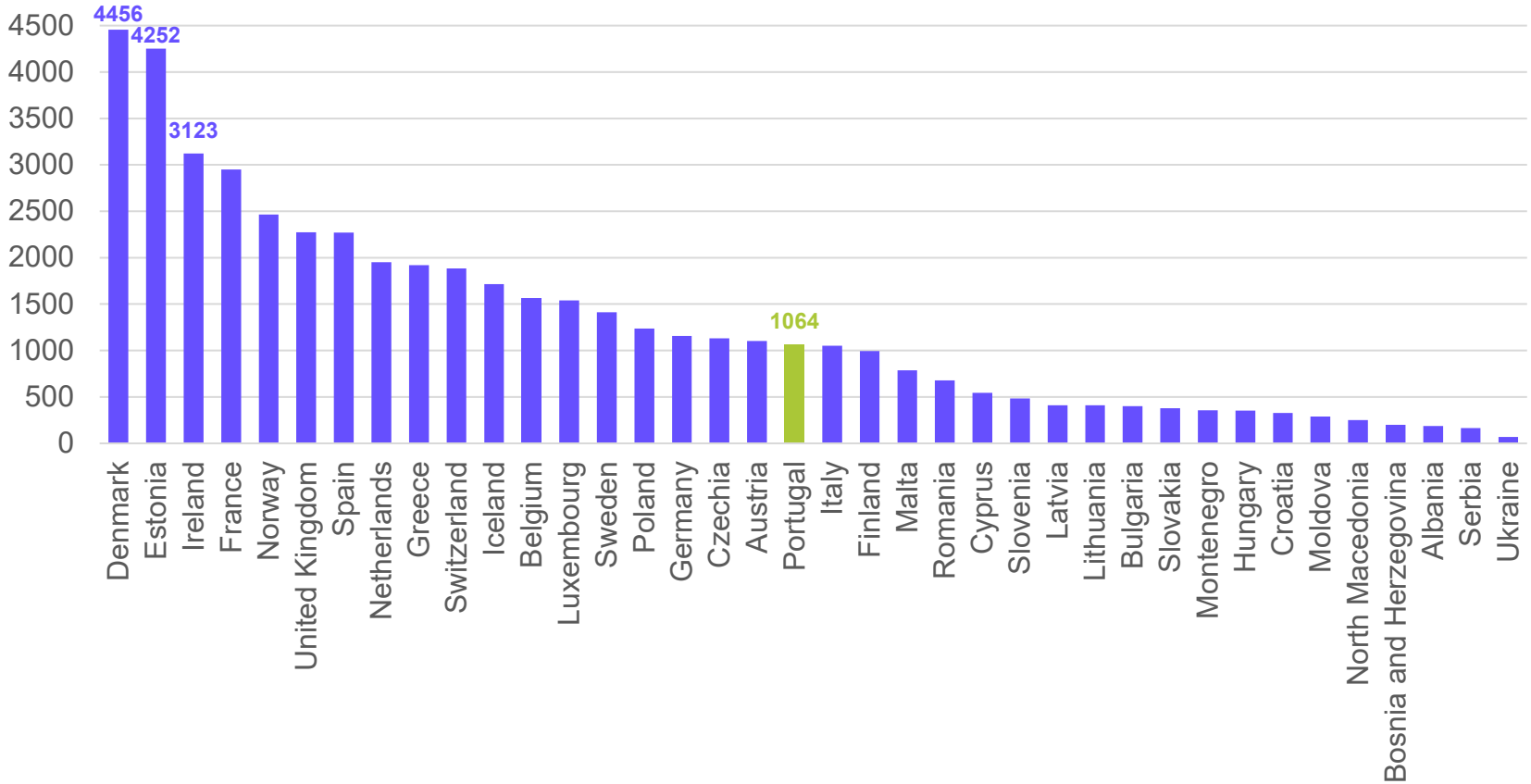
Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

B2C e-commerce turnover growth in Europe by country (in %), 2025



Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

B2C e-commerce per capita by country (in €), 2025



Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

Opportunities for e-commerce in Europe

- **AI adoption across the e-commerce value chain:** customer service, content creation, marketing, recommendations, personalisation, pricing, analytics and operations
- **Emergence of agentic AI:** new ways to support and potentially automate parts of the consumer shopping journey
- **Growing payment choice and convenience:** mobile payments, digital wallets, instant payments and Buy Now Pay Later options
- **Expansion of flexible delivery options:** parcel lockers, pickup points and other out-of-home delivery solutions
- **Circular business models** such as repair, resale, refurbishment and rental
- **Supply-chain diversification and regional sourcing** in response to geopolitical and trade uncertainty

Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

Challenges for e-commerce in Europe

- **Complex and overlapping regulation** continues to create administrative and compliance burdens, particularly for SMEs
- **Differences in implementation and enforcement across the Single Market** make cross-border compliance more difficult
- **Uneven competition with non-EU sellers and platforms**, particularly around customs, VAT, product safety and environmental requirements
- **AI creates new strategic challenges:** trust, visibility in AI-driven interfaces, control over customer relationships and the future role of webshops
- **SMEs face resource and capability constraints** in adopting AI, digital technologies and sustainability measures
- **Geopolitical tensions, protectionism and tariff uncertainty** complicate supply chains and international trade

Source: Weltevreden, J.W.J. (2026). European E-commerce Report 2026. Amsterdam/Brussels: Amsterdam University of Applied Sciences & Ecommerce Europe.

Download the report here (light version)



https://ecommerce-europe.eu/wp-content/uploads/2026/09/CMI2026_LIGHT.pdf

How is AI changing online shopping?

AI is everywhere!

75,000+
AI tools & companies
tracked by RankmyAI

19B
monthy visits
across these tools

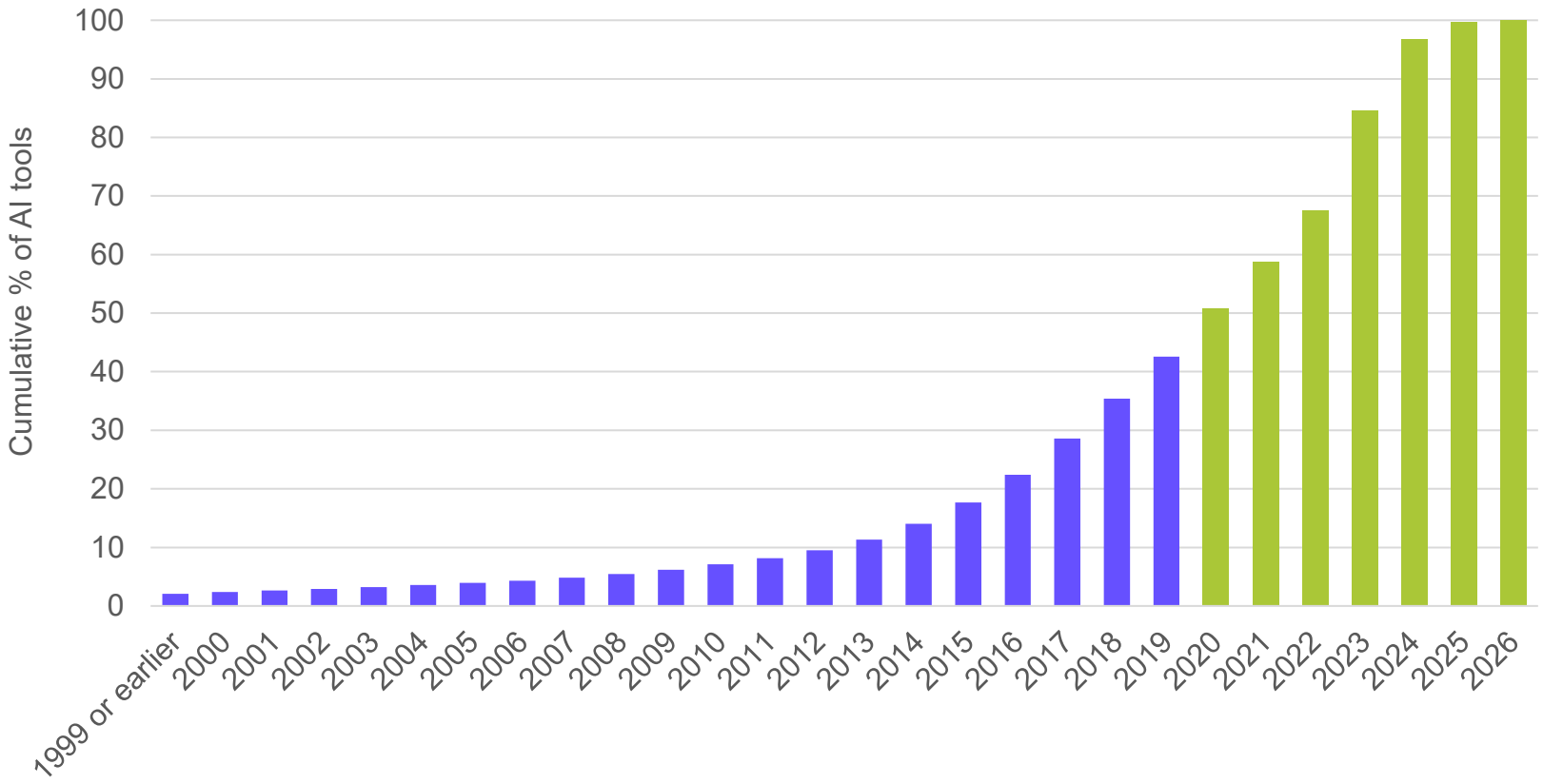
Rapid growth
since 2020
thousand of new tools launched every month



What we track
- Leading AI tools & companies
- Signals of traction (traffic, investment, reviews)
- Core e-commerce use cases
- Based on continuous data collection

What exists at scale in the market
- Large and fast-growing long tail
- Many niche and domain-specific tools
- High volume of similar tools
- Internal and non-visible AI systems
- Continuous inflow of new tools

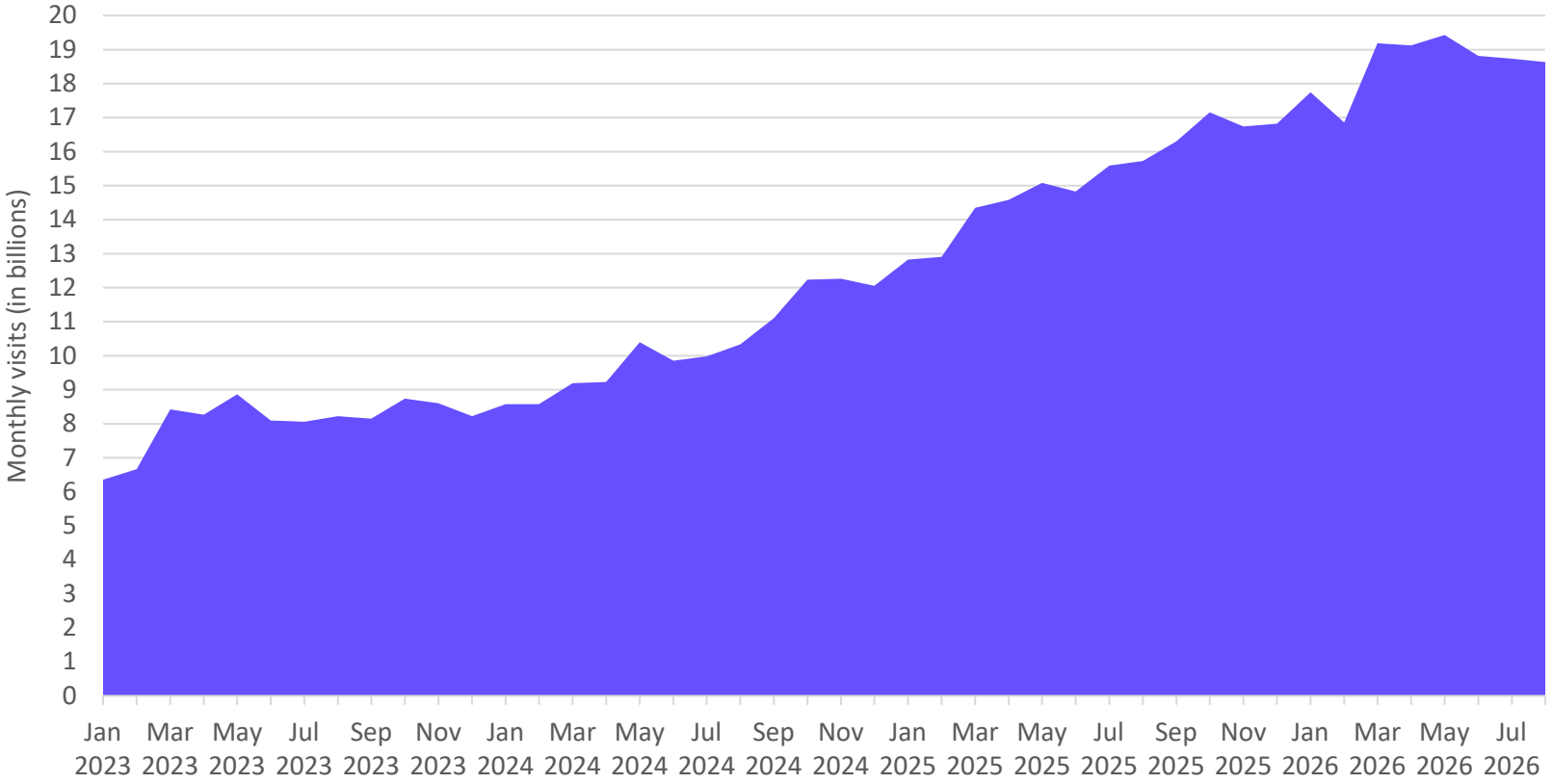
Most AI tools and companies were founded after 2019



* Based on a sample of 45,190 AI tools and companies from RankmyAI's database.

RankmyAI

Global traffic to AI tools has almost tripled to 18.6B monthly visits

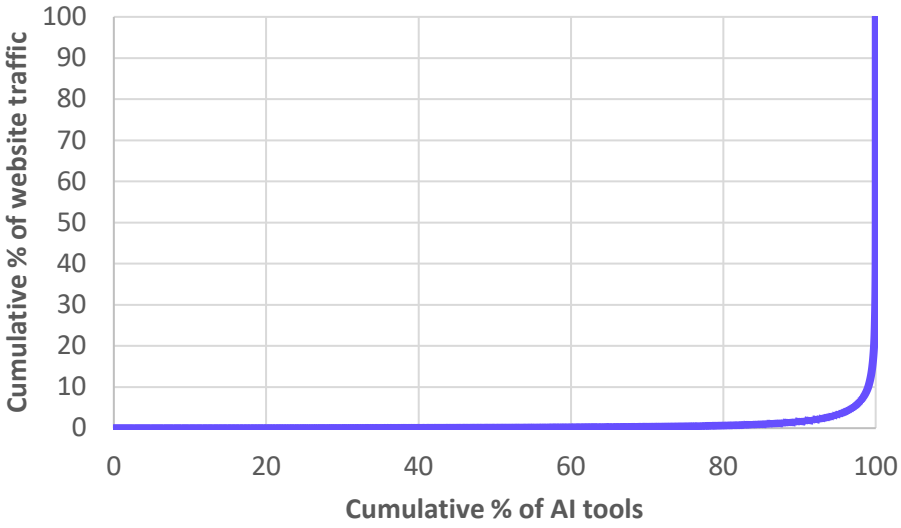


Based on a sample of 45,190 AI tools and companies from RankmyAI's database and data from SimilarWeb

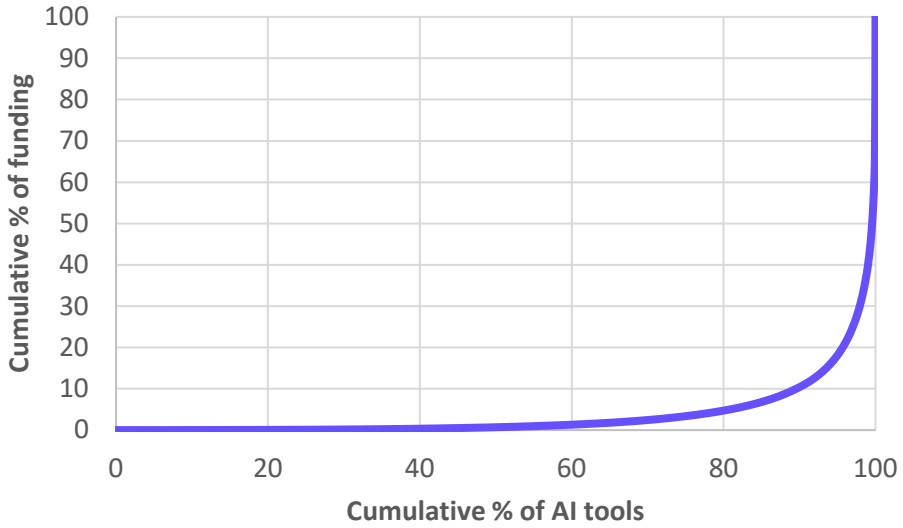
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Market traction is highly concentrated

Top 4 = 52% of total traffic



Top 68 = 50% of total funding



Only includes tools with measurable traffic (N = 41,576), data from March 2026

Only includes tools with known external funding (N = 15,227) , data from March 2026

RankmyAI

Why is traction so concentrated (especially in GenAI)?

1 Low barriers to entry (application layer)

- Easy to build and launch new tools
- Rapid increase in the number of tools

"We're in a phase where anyone who can build a website and connect an API can launch an AI tool."

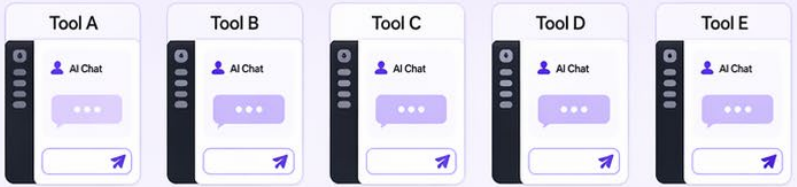




2 Limited differentiation (application layer)

- Many tools are built on the same AI models
- Similar functionalities across tools

Different names. Same functionalities.



3 Concentration at the foundation layer

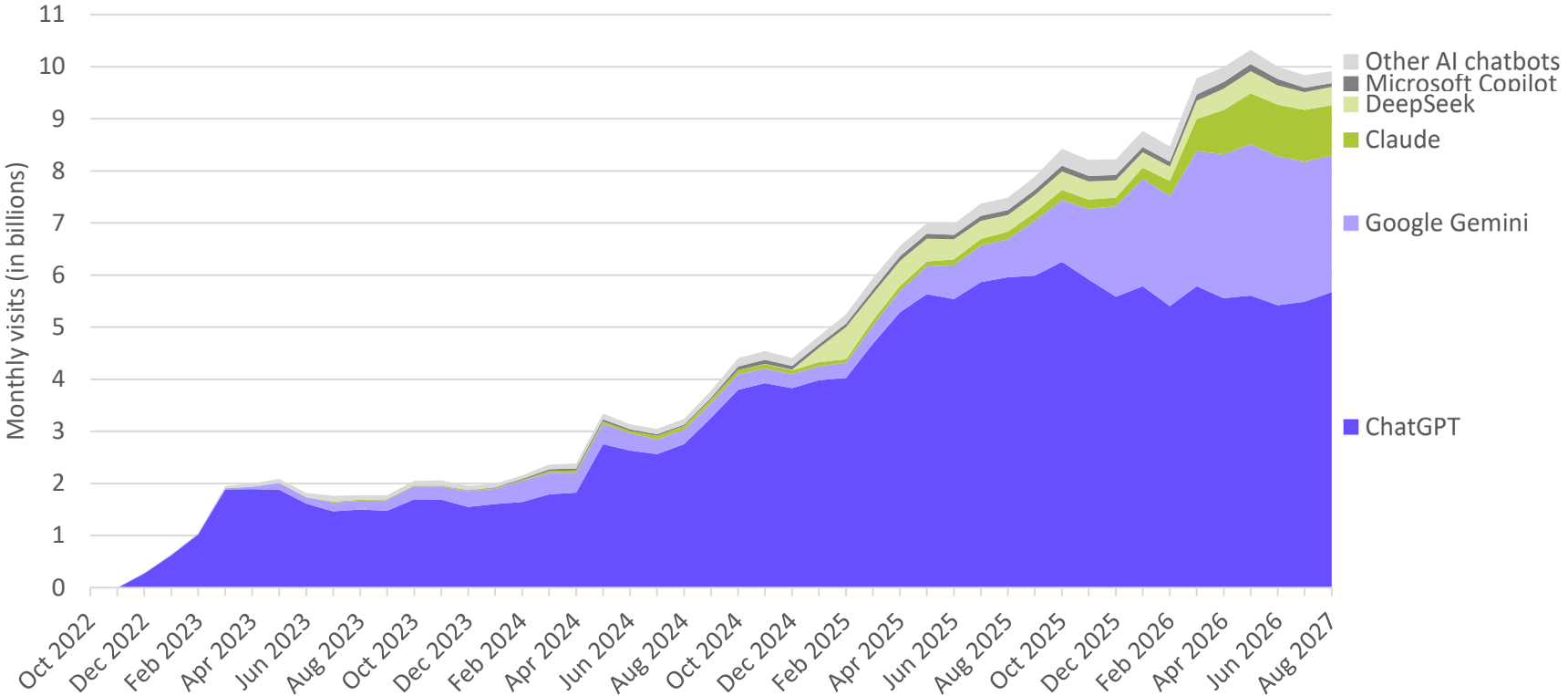
- Dependence on a few model providers
- Most investment flows to these companies

A few companies own the foundation. Everyone else builds on top.



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Strong growth and concentration in AI chatbot usage*



* Based on a sample of the 15 leading AI chatbots by web traffic in the world from RankmyAI's database and data from SimilarWeb

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AI is the new entry point to product and brand discovery

AI is taking over the search results

- Google AI Overviews → 1B+ users, expanding to 100+ countries
- 80% of users rely on AI summaries in at least 40% of searches

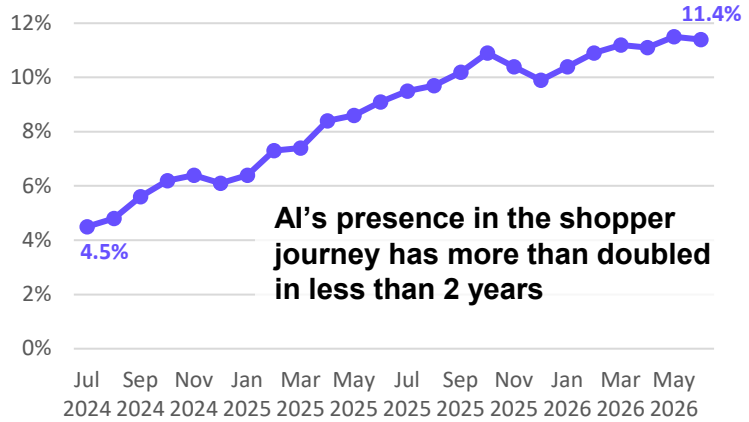
Discovery is shifting to AI chat interfaces

- 44% of users prefer AI tools over search engines (31%)
- 40-55% of consumers use AI to discover, compare, and evaluate products before buying

Traffic is shifting away from traditional search

- 20% to 50% of traditional search traffic at risk
- 15-25% reduction in organic traffic already observed

Share of shopper journeys where AI is visited before a transactional website
US; Desktop; Jul 2024 - Jun 2026



Sources:
https://www.bain.com/insights/goodbye-clicks-hello-ai-zero-click-search-redefines-marketing/
https://www.mckinsey.com/insights/marketing-and-sales/new-front-door-to-the-internet-winning-in-the-age-of-ai-search
https://www.similarweb.com/corp/2025-state-of-ecommerce/
https://www.similarweb.com/corp/the-state-of-ecommerce-2026/

AI shapes what your customers see (and where they buy)

AI filters what your customers see

- AI shows one answer or a short list instead of pages of results
- Users increasingly rely on these outputs to decide

Your website is no longer the main source

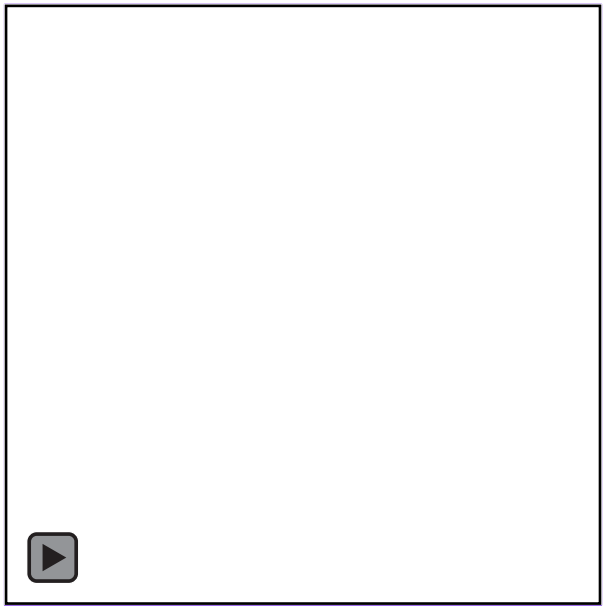
- Brand websites account for only 5–10% of sources in AI answers
- AI combines information from many external sources

Your visibility is not guaranteed

- Even some leading brands are absent in AI-generated answers
- Strong SEO performance ≠ visibility in AI

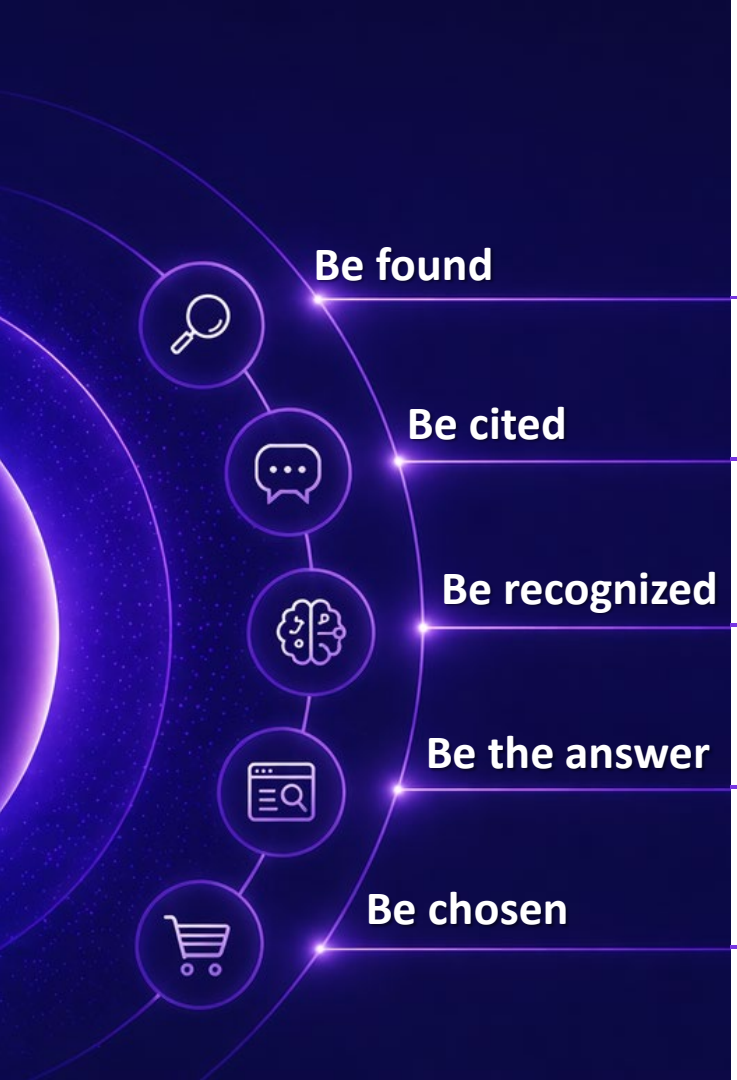
Your competitors can already sell directly through AI

- Platforms like Etsy and Booking integrate with leading AI chatbots
- This gives these companies a competitive advantage



Sources:
https://www.bain.com/insights/goodbye-clicks-hello-ai-zero-click-search-redefines-marketing/
https://www.mckinsey.com/insights/marketing-and-sales/new-front-door-to-the-internet-winning-in-the-age-of-ai-search
https://help.etsy.com/hc/en-us/articles/34208252828695-Purchasing-Etsy-Items-Through-ChatGPT-Gemini-Google-AI-Mode-and-Copilot?segment=shopping

From SEO to AI-driven visibility



Search Engine Optimisation (SEO)

- Build backlinks from relevant sites
- Optimize product pages & category pages
- Rank for product keywords
- Fix technical issues

Generative Engine Optimisation (GEO)

- Structure pages for AI summarization
- Add schema (reviews, pricing, FAQs)
- Write content AI can quote
- Target “best X for Y” queries

AI Optimisation (AIO)

- Get included in AI training data sources
- Keep information factual and consistent
- Use structured, rich content
- Be featured on trusted platforms

Answer Engine Optimisation (AEO)

- Create FAQ and how-to content
- Answer questions clearly and directly
- Optimize for AI Overviews
- Apply zero-click content strategies

Search Experience Optimisation (SXO)

- Align content with buying intent
- Build fast, mobile-friendly pages
- Add clear calls to action

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What comes next? AI moves from answers to actions

Agentic AI takes the human out of the loop

NOW: HUMAN IN CONTROL

1. You ask
You search or ask AI

2. AI assists
AI finds, compares and recommends options

3. You decide
You review and choose

4. You act
You complete the purchase or next step

AI informs. You decide.

NEXT: AI AGENTS TAKE ACTION

1. You set intent
You share your goal, preferences, budget and constraints

2. AI plans & searches
Agent searches across multiple sources and gathers the relevant options

3. AI decides & executes
Agent compares, negotiates, selects and completes the task

4. You get the outcome
You receive confirmation, updates and the results

AI acts. You get the outcome.

THE SHIFT IN IMPACT

- From searching to **delegating**
- From browsing to **task completion**
- From discovery to **transaction**
- From you doing to **AI doing**

What to do in an agentic world?

Ensure your products can be selected by AI agents

- Provide structured, machine-readable product data
- Make price, availability and key product attributes easy to compare

Ensure AI agents can act on your offering

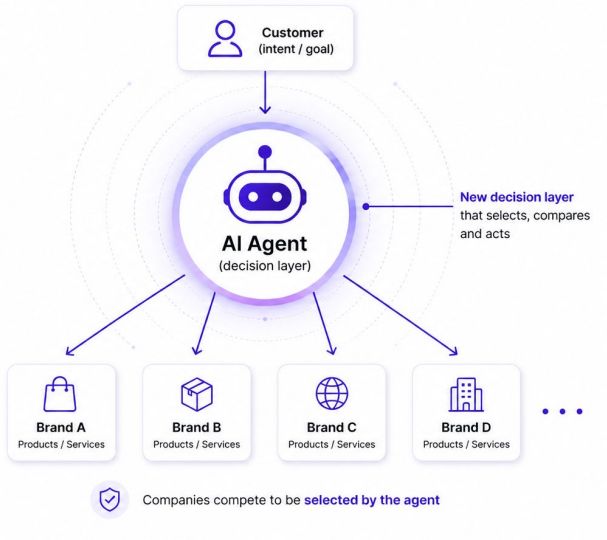
- Enable integrations so agents can access and complete transactions
- Build agent-ready sites that support both AI agents and human users

Be selected by agents without competing on price alone

- Price, speed, availability and fit become decisive
- Unique brands, exclusive assortments, and value-added services are key

Start testing and learning now

- Experiment with agent-driven discovery and transactions
- Early movers gain experience and competitive advantage



Don’t get carried away by the AI hype

AI is changing how we shop.
But how far and how fast will it go?

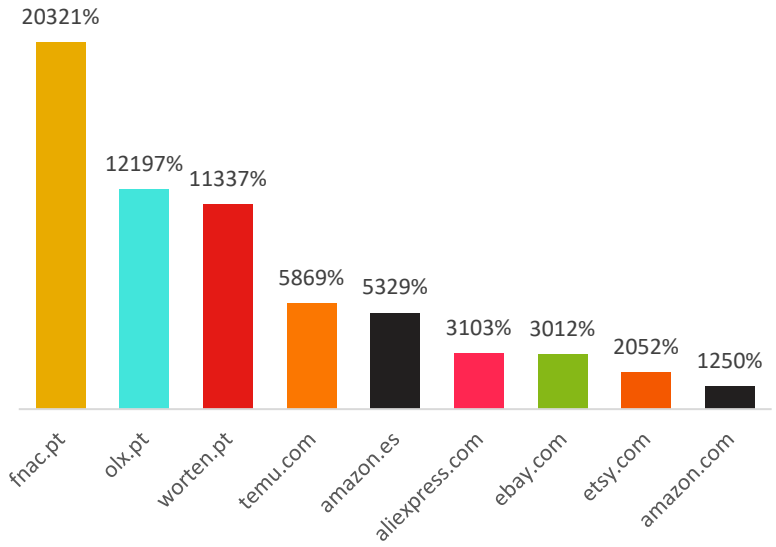
Agentic shopping is being pushed hard.
Whether consumers will adopt it at scale remains an open question.

Stay informed. Question whose interests are behind the story.
Experiment and learn.

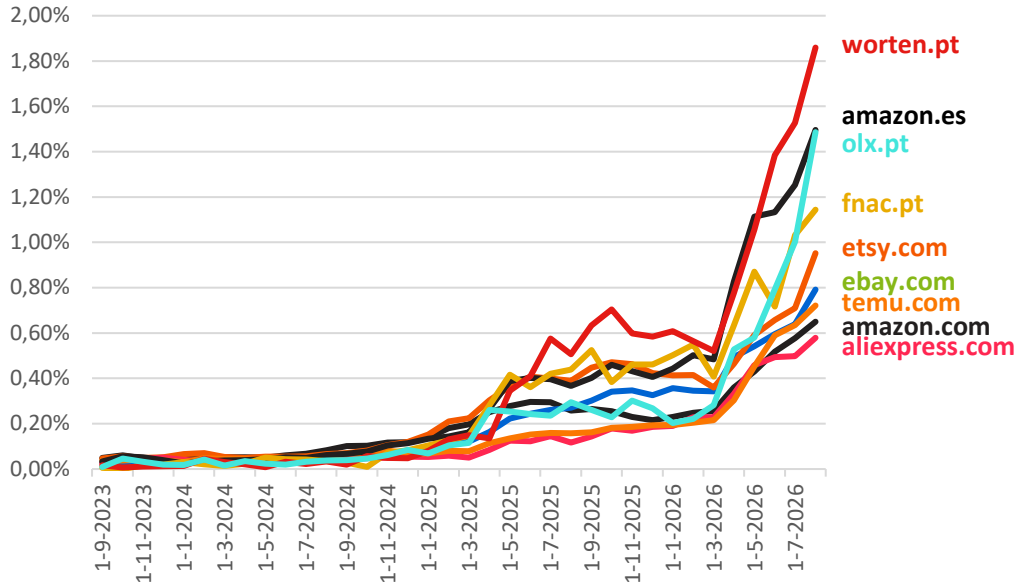


Marketplaces compared on GenAI referral traffic

Growth in GenAI referral traffic
September 2023 versus August 2026



GenAI referral traffic share per online shop, per month



79% of the GenAI referral traffic in August 2026 is from ChatGPT!

Source: SimilarWeb

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How to expand internationally with AI?

Where AI can create business value



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Where AI can support international expansion

International market intelligence & entry

Market opportunities, channels & partners

International marketing & sales

Customer acquisition, localisation & sales

International operations & compliance

Inventory, logistics, administration & compliance

International customer service & risks

Customer support, returns, payments & fraud prevention

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International market intelligence & entry

Market opportunities, channels & partners

Area	Examples of what AI can do	Examples of tools
Export market selection	Market opportunity scoring, Market growth forecasting	exporta.ai, Tradelmex, Tendata, TradeInt, atominc
Customer demand & product-market fit	Search trend analysis, Demand forecasting, Product preference analysis	felton, Soulution, NEXTATLAS, Revuze, MARKETLOGIC
Competitor analysis	Competitor discovery, Price monitoring, Product and positioning comparisons	Minderest, JungleScout, valona intelligence, Nolyn, QUID
Buyer & distributor identification	International buyer discovery, Buyer profiling, Lead scoring, Distributor matching	trademo., INFIGROW AI, Kuration, Reevol

International marketing & sales

Acquiring customers and growing international sales

Area	Examples of what AI can do	Examples of tools
Webshop & product content localization	Website, app and product description translation, Multilingual content generation, Localised content	WEGLOT, lokalise, SMARTLING, XTM Transifex, Phrase
Marketplace listing optimisation	Localised listings, Product category matching, Marketplace search optimisation	channable, LENGOW, Epinium, Helium 10
International SEO & GEO	Local keyword research, Multilingual SEO, AI search visibility optimisation	SEMRUSH, ahrefs, LocalFalcon, Surfer
International marketing & advertising	Localised ad creation, Country-specific audience targeting, Cross-market campaign optimisation	Leadzai, SMARTLY, AdCreative.ai an Appier group company, Celtra

International operations & compliance

Making cross-border operations more efficient

Area	Examples of what AI can do	Examples of tools
International inventory management	Demand forecasting, Inventory allocation, Stockout prediction	Prediko, flowlity, optiply., fabrikatör
Cross-border logistics & delivery optimisation	Route optimisation, Delivery time prediction, Shipment disruption detection	FREIGHTOS, portcast, Trimble, project44
Export administration & documentation	Trade document generation, Document processing, Customs declaration preparation	Digicust, SKAY, feld, conex (Your customs partner)
International trade compliance	Sanctions screening, Export restriction checks, Product compliance assessment	trademo., Altana, traide, DUTIFI
International financial risk management	Currency risk management, Buyer credit risk assessment, Cross-border cash flow forecasting	H edgio, bound, WorldFirst, AMBRIVA

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International customer service & risks

Supporting international customers and reducing risks

Area	Examples of what AI can do	Examples of tools
Multilingual customer service	Multilingual customer interactions, Automated enquiry handling, Intelligent escalation	eDesk, gorgias, trengo, Aidanta
Cross-border returns management	Return claim assessment, Return reason analysis, Return fraud detection	reveni, Claimlane, loop, PANGO
International fraud prevention	Transaction fraud detection, Suspicious account activity, Fraud risk assessment	Signifyd, SEON, ClearSale (A part of Experian), FRAUDLABS PRO
Cross-border payment optimisation	Payment routing optimisation, Failed payment recovery, Payment performance analysis	SLICKER, flycode, Praxis, Orchestr, Paysecure, FastSpring

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USE AI BEFORE BUYING AI BEFORE BUILDING AI

USE AI

General-purpose AI assistants

- Export market research
- Competitor analysis
- Product translation
- Export planning

BUY AI

Specialised AI SaaS solutions

- Marketplace listing optimisation
- Inventory forecasting
- Fraud detection
- Customs automation

BUILD AI

Custom AI development

Build AI only when existing solutions:

- Cannot meet your specific requirements.
- Are less cost-effective than custom development.

Choose the most cost-effective AI approach that meets your business needs.

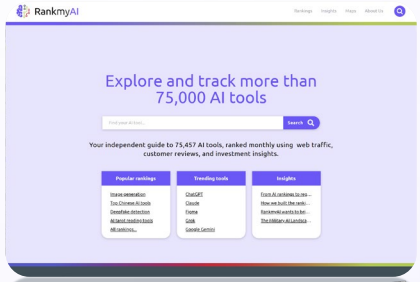
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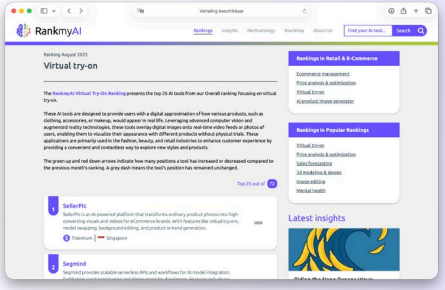
How RankmyAI brings clarity to the AI landscape

Discover the right tools
75,000+ AI tools across all use cases
Find and compare what fits your needs

See what actually matters
Rankings based on real usage signals
Cut through hype and misinformation

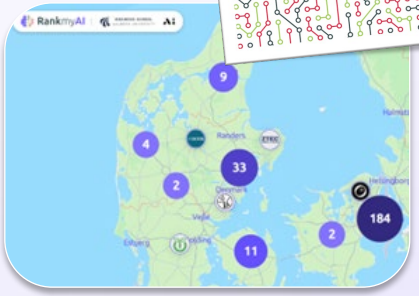
Understand the ecosystem
AI maps and reports by country and region
Identify where the real opportunities are

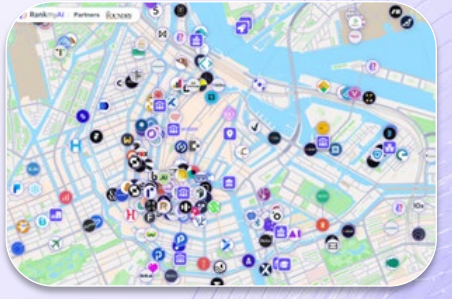












75,000+
AI tools tracked

Real usage data
Not opinions

Maps & reports
By country & region

Independent
Unbiased & transparent

Cutting through the AI hype!

Independent, data-driven rankings to discover and compare AI tools

Marketing & Content

- Ad generation
- Email marketing & automation
- Product image generation
- Keyword analysis
- Search engine optimization
- SEO copywriting
- Persona development

Sales & Customers

- Customer support
- Call & contact centre management
- Sales forecasting
- Price analysis & Optimization
- Virtual try-on

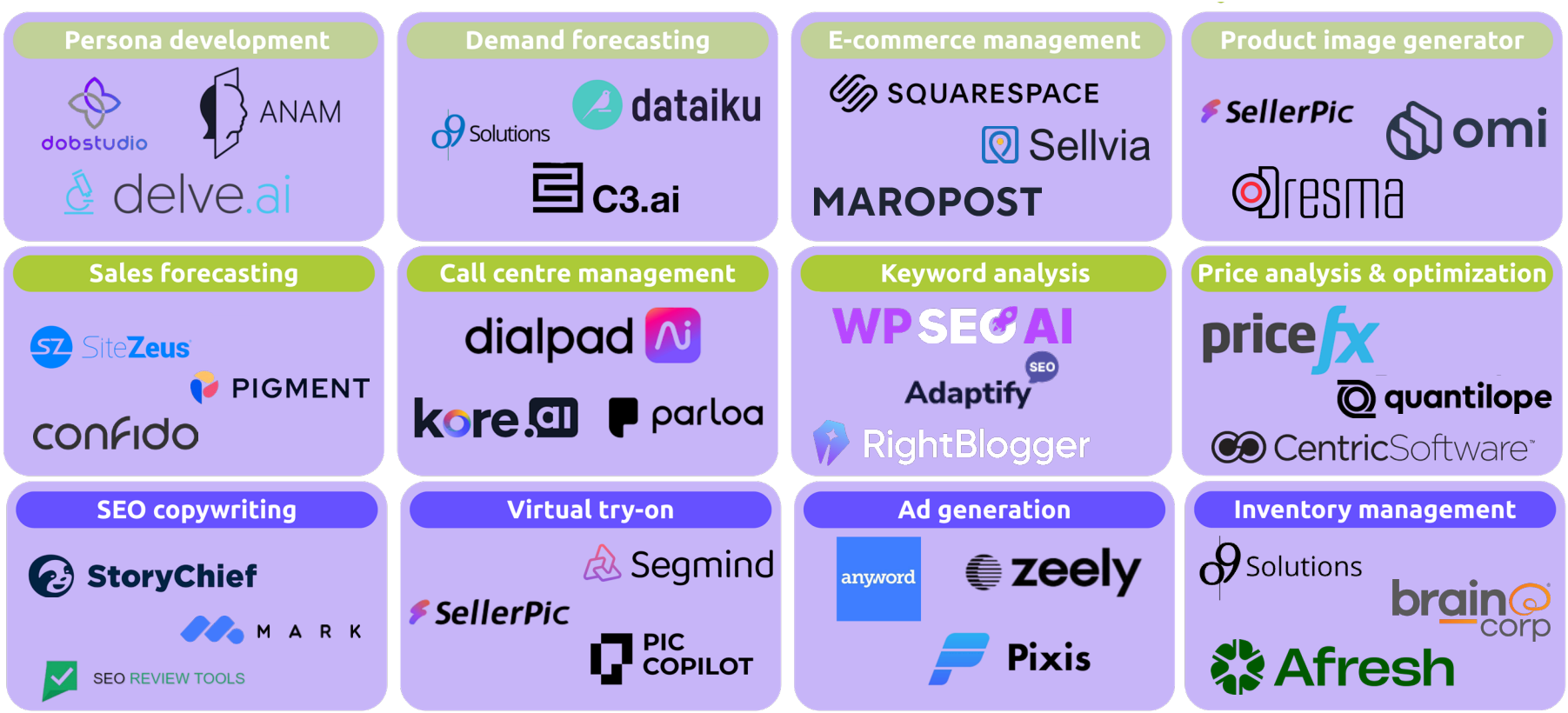
Operations

- Demand forecasting
- E-commerce management
- Inventory management
- Supply chain management
- Fraud detection & prevention
- Sustainability analysis & reporting

Examples of RankmyAI use-case rankings relevant to retail & e-commerce.

RankmyAI

Leading AI tools for retail & e-commerce



www.rankmyai.com/rankings

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Take aways

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- **European e-commerce continues to grow** despite economic and geopolitical uncertainty. Portugal is one of the fastest growing markets!

- AI is already **changing how people discover and compare products**. Businesses need to adapt now to remain visible.

- AI can support **every stage of international expansion**. From market selection to customer acquisition, logistics and compliance.

- **Use AI before buying AI** and buy before building. Choose the most cost-effective approach for your business needs.

- SMEs need support in **AI tool selection and skills development**. BSOs and TPOs can help SMEs choose the right AI tools and develop the skills to use them effectively.

Let’s connect and stay ahead of what’s next

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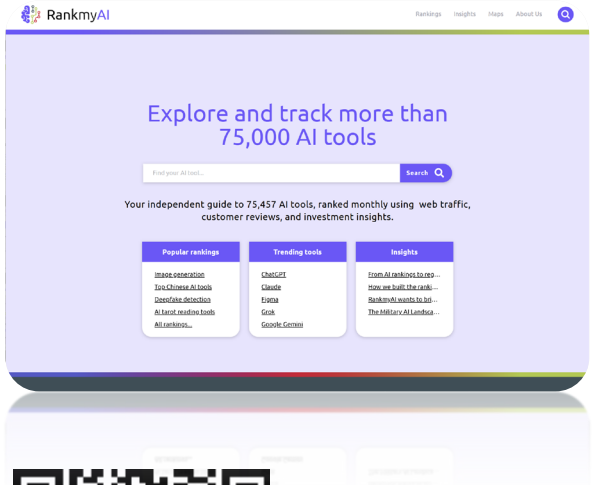
Prof. Jesse Weltevreden PhD

Founder & CEO – RankmyAI
Professor Digital Commerce
Amsterdam University of Applied Sciences

j.w.j.weltevreden@hva.nl

+31 (0)6-10153268

Connect with me on LinkedIn
www.linkedin.com/in/jesseweltevreden



See which AI tools are gaining traction now

www.rankmyai.com/rankings