

# AI Sparks

Cutting through the AI hype with one clear insight each week

## The First Trillion Dollars in Agentic Commerce

One of the most interesting Agentic AI opportunities may not be in retail, search, or even software. It may be hiding in plain sight within online delivery platforms.

Today, consumers open an app and browse. Tomorrow, they may simply tell an AI agent, “Order dinner for my family under \$60” or “Make sure we never run out of dog food.” The agent handles the discovery, comparison, ordering, and fulfillment. The consumer shifts from making decisions to approving them. The future of commerce may not be defined by AI assistance. It may be defined by AI delegation.

For delivery platforms, this creates a much larger opportunity than faster ordering. These businesses already possess three critical ingredients for agentic commerce success. They have intent, transaction capability, and fulfillment infrastructure. Very few industries have all three. As AI agents become more capable, delivery platforms have the potential to evolve from marketplaces into Personal Consumption Operating Systems that help consumers manage recurring needs across food, groceries, household essentials, and health products.

The marketing implications are equally profound. For the last two decades, marketers have focused on influencing human decisions. In an agentic world, marketers will increasingly need to influence AI decisions. Creative, branding, and user experience will remain important, but structured data, inventory visibility, delivery reliability, customer satisfaction signals, and pricing intelligence may become equally important inputs into how agents recommend products and services.

The biggest winners may not be the platforms with the largest selection. They may be the platforms whose AI agents earn the greatest trust.



**Your spark for the week:** The first trillion dollars of Agentic Commerce may not come from helping consumers discover. It may come from eliminating friction from purchases they were already planning to make. In that world, the most valuable companies won't own attention. They will own trusted decision-making.

NetElixir is an AI-First digital marketing agency helping leading eCommerce brands unlock profitable growth through data, experimentation, and innovation.