digital FMCG by iPresso

WHITE PAPER 2026

Scroll-Paced Shopping: Social and Live Commerce as the New Frontier for FMCG Consumers

July 2026

Report: DigitalFMCG Insights

1. A New Turning Point

Product discovery and impulse buying have shifted from retail shelves and search engines to social media platforms. This is no longer a trend confined solely to international markets. On June 15, 2026, TikTok Shop officially launched in Poland, alongside Austria, Belgium, and the Netherlands, marking the next phase of the platform's European expansion.

- **Reach**. According to TikTok, 200 million people in Europe use the platform every month to discover trends, products, and creators. The model combines entertainment, product discovery, livestreaming, and checkout within a single app—unlike traditional, search-driven e-commerce.
- **Dynamics**. Since its EU launch, over 100,000 European businesses have joined the platform, and daily Gross Merchandise Value (GMV) across existing markets posted triple-digit growth rates between August 2025 and February 2026.

> According to eMarketer, the social commerce market is set to expand from its current €25.8 billion to **€44.8 billion** by 2028, with a growth rate projected to significantly outpace that of traditional e-commerce.

2. What Makes This Channel Different

Social and live commerce aren't just another marketplace. This is commerce built on impulse and social proof, where sales are driven by content and creators, rather than a product detail page (PDP).

- **Live Conversion**. Livestream shopping converts at rates as high as ~30%, versus the 2-3% typically seen in legacy e-commerce (GetStream). On TikTok Shop, live sessions already generate around 16% of total revenue.
- **The Creator as the New Sales Rep.** For top-performing shops on TikTok, 84-95% of revenue is generated by independent creators via a commission-based affiliate model. Top-selling products are promoted concurrently by dozens of creators, where the repetition of authentic voices builds trust and shapes the consumer's purchase decision.
- **Impulse over Intent**. Revenue from shoppable video can see a more than tenfold increase within just 6 months (market analysis by Effinity/Armatis). The consumer doesn't arrive with an intent to buy—they come for entertainment and end up checking out.

3. The Catch: You're Renting Audience Attention from a Third Party Again

For FMCG brands, this represents both an opportunity and a recurrence of the challenge highlighted in our Retail Media report. Social platforms and creators are becoming the new walled garden: they control reach, the algorithm, and, most importantly, customer data.

- **The transaction remains on-platform.** Checkout is completed entirely in-app. The brand secures a sale but often misses out on the relationship and the data—the customer profile stays with the platform and the creator.
- **Dependency on Algorithms and Creators.** Reach is dictated by the algorithm and the creator's ongoing promotion of the product. It represents the same asymmetry that strips brands of their autonomy in retail networks, just operating within a different ecosystem.
- **Quick commerce adds further pressure on packaging formats.** In parallel, the rise of q-commerce and dark stores (~10-minute delivery) is forcing smaller product sizes tailored for immediate consumption—yet another channel where brands are left with zero consumer visibility without their own first-party data.

Channel	The Upside for Brands	What Brands Fail to Capture
Shoppable video / TikTok Shop	Reach, Impulse, Revenue	First-party consumer data
Live shopping	Ultra-high conversion rates, trust	Sustained engagement after the broadcast
Creator Affiliation	Authenticity, scale of voices	Narrative control and brand loyalty

4. From Scroll to Relationship

The answer isn't to ignore the channel—doing so cedes product discovery to competitors—but rather to view social and live commerce as the top of the funnel for capturing first-party relationships.

- **Value exchange at the moment of impulse.** Offering a promo code, limited-edition product, or exclusive drop access in exchange for registration migrates the consumer off the platform and directly into the brand's own ecosystem and CRM.
- **The Creator as a Bridge, Not the Endpoint.** Partnering with creators has become the new trade marketing. However, the objective shouldn't just be converting the sale, but capturing the relationship instead—leveraging tactics like dedicated landing pages,

interactive quizzes, or owned brand communities.

- **Blended Attribution.** We evaluate channel value not merely through in-app sales, but by its performance in driving lead generation and long-term customer lifetime value (CLV) across owned channels.

5. Strategic Takeaways

Be present where discovery begins. Social and live platforms are now the top of the FMCG funnel, particularly for younger consumers. Absence means ceding the discovery moment to the competition.

Architect every activation around data capture. Creator partnerships and livestream sessions should always include a built-in mechanism to transition the audience off the platform and into your own ecosystem to secure zero-party data.

Build consumer pull, not just impulse sales. Authentic, recurring creator voices generate demand that flows back to the brand even off-platform.

Tailor your portfolio for q-commerce. Smaller packaging sizes and immediate consumption represent a distinct battleground; pair these formats with data capture strategies to avoid becoming just an anonymous supplier for dark stores.