

WHITE PAPER 2026

The Invisible Shelf: How FMCG Brands Disappear in the Era of AI-Driven Shopping

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Report: DigitalFMCG Insights

1. The New Touchpoint: Conversation Over Search

For two decades, FMCG brands have optimized their visibility across search engines and virtual shelves. In 2026, a new intermediary has emerged between the consumer and the product: **an AI agent** that autonomously searches, compares, and completes the purchase on behalf of the user.

- **Scale and Velocity.** Traffic from AI assistants (GenAI browsers and chatbots) to US retail sites surged by approximately 4,700% year-over-year in July 2025 (Adobe, via BCG). During the peak of Black Friday 2025, this growth reached +805% YoY.
- **From Browsing to Buying.** According to an Adobe study (March 2026), 39% of consumers have already used AI assistants during online shopping, with 85% reporting that these tools enhanced their shopping experience. The quality of traffic has also evolved: while AI-driven traffic converted at a lower rate than traditional traffic a year ago, by March 2026, its conversion rate surpassed traditional channels.

Up to **25%** of global e-commerce is projected to involve AI agents by 2030, while 55% of digital consumers will begin their product searches on LLM platforms.

2. Why FMCG Brands Are at Risk

Agentic commerce (a-commerce) isn't simply another channel—it's a complete restructuring of the decision-making layer. Since consumers bypass banners, sponsored listings, and physical packaging altogether, the purchasing choice is handed over to an algorithm evaluating structured product data.

- **The Threat of Disintermediation.** BCG identifies three core risks for brands and retailers: a weakened direct line to the customer, eroding loyalty, and a growing reliance on intermediary platforms. An "agent-driven" consumer is about 10% more engaged and further down the funnel, but the AI agent intercepts the relationship before the brand can establish it.
- **A Brand "Unreadable by Machines" is an Invisible Brand.** According to VML's "The Future 100: 2026" report, the center of gravity in marketing is shifting from influencing humans to influencing systems and algorithms. Product taxonomy, attributes, and API integrations are becoming the very foundation of visibility; brands whose data is not machine-readable simply do not make it into AI recommendations.
- **The Data Quality Premium.** McKinsey estimates that AI-generated recommendations convert up to 4.4x better than traditional search results. However, this premium goes exclusively

to brands whose data the agent can understand and trust.

3. The Existing Market Landscape

The infrastructure layer reached maturity in 2025. The arrival of open transactional protocols changed the landscape: ACP (OpenAI + Stripe, driving ChatGPT commerce), UCP (Google + Shopify, powering AI Mode and Gemini), and MCP (Anthropic, providing the crucial data access layer for real-time product, pricing, and stock availability). Agentic shopping is no longer a futuristic concept—it is a functioning, scalable market.

Forecast	Value / Horizon	Source
AI Share of E-commerce (2030)	15-25%	Bain & Company
Retail Revenue Orchestrated by AI Agents (2030)	\$3–5T annually	McKinsey
US Agent-Driven E-commerce Spending (2030)	\$190B–\$385B	Morgan Stanley

4. Inside the Black Box: Who Controls the AI Agent’s Memory?

Analysts (Kantar, cited by MetaRouter) point to a quiet evolution in the Retail Media model: a transition from selling ad inventory to licensing data access. AI agents bypass traditional CPM and CPC metrics entirely; instead, they parse product data, compare pricing, and weigh loyalty rewards. Consequently, billing models are shifting toward "cost-per-agent-conversion" and optimization for algorithmic decision-making.

- ➔ **A New Attribution Challenge.** Already 55% of US advertisers report inconsistent targeting and attribution across Retail Media Networks—a problem that escalates as AI agents bypass traditional tracking.
- ➔ **Zero-click Commerce.** Consumers may never click, search, or visit a website. Brand visibility is entirely determined by whether the AI agent knows, understands, and trusts the brand's data.

5. Strategic Playbook: How to Stay Visible

To effectively build relationships with Gen Z, organizations must abandon a siloed approach to data. We recommend:

- ➔ **AEO/GEO as the New SEO.** Structure your product data with rich attributes, unambiguous taxonomy, nutritional facts, ingredients, use cases, and

reviews in a format that an AI agent can seamlessly read. Your product catalog is now a core marketing channel.

- **First-Party Data as the "Ticket of Admission" to Preferences.** The agent optimizes for the individual user. A brand that understands consumer preferences (zero-party data) and maintains its own direct relationship can become a predefined preference in the brief passed to the agent (e.g., "buy my favorite brand X").
- **Loyalty That Survives the Intermediary Layer.** Loyalty programs built on emotional value and tangible benefits—rather than just price—ensure that the consumer explicitly instructs the AI agent to choose a specific brand, instead of letting the algorithm default to the cheapest alternative.

About DigitalFMCG

We are a strategic partner for companies looking to turn digitalization challenges into a sustainable competitive advantage. We combine deep FMCG sector expertise with advanced data analytics.

Is your product data ready for the age of AI agents? Let's find out.

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