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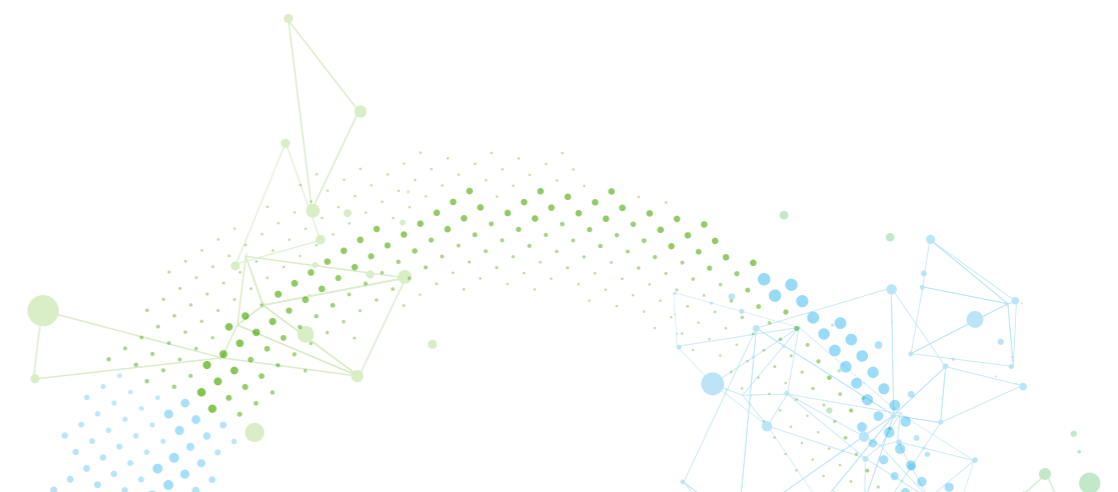
## The future of commerce:

Agentic shopping  
in Asia Pacific



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# The future of commerce: Agentic shopping in Asia Pacific

AI is rewiring commerce as we know it, changing how retailers operate, how brands compete and how shopping is experienced. It has the potential to recalibrate every layer of the retail chain from the storefront to digital marketplaces, operations and fulfilment. At the heart of this shift is the rise of AI agents: autonomous systems that can search, reason, execute tasks, and increasingly take action on behalf of customers, workers and businesses. As they evolve, AI agents are reshaping the fundamentals of shopping – not only for customers but also the employees who serve them.

Shifts of this scale are rare, and leaders are navigating genuine uncertainty about how fast the change will unfold and where value will be created. Yet momentum is building rapidly and nowhere more so than in Asia Pacific. With some of the world's most advanced and dynamic digital retail ecosystems, Asia Pacific is where agentic commerce has the potential to evolve fastest and where its future direction will likely be defined.

Let's explore the current state of agentic commerce in Asia Pacific, what themes and trends are emerging, and how retailers and brands can position themselves to succeed.

## Definitions



**AI agents:** Agents are digital workers that can automate tasks, orchestrate workflows, tools and processes autonomously or collaboratively with human workers.



**Agentic commerce:** Agentic commerce refers to a retail environment where AI systems make decisions and take actions across the value chain, supporting and automating how customers shop and how retail businesses operate.



**Shopping agents:** AI shopping agents or 'shopping bots' are intelligent assistants that can search for products, compare prices, read reviews and complete purchases online on behalf of customers.

# Why Asia Pacific is primed for agentic commerce

With over 4.3 billion shoppers, 18 megacities and the fastest-growing middle class on earth, Asia Pacific is renowned as global retail's growth powerhouse and innovation laboratory. The region is expected to drive two thirds of the world's new retail sales over the next five years.<sup>1</sup>

From 10-minute deliveries in India, to avatar-hosted livestreams in China, Asia Pacific has pioneered many of the models that are redefining global retail. Super-apps are central to how consumers live and shop. Social and livestream commerce have become mass-market, culturally embedded retail formats operating at significant commercial scale. While quick commerce has set a new global standard for speed, convenience and last-mile execution.

In many markets across the region, seamless digital to physical commerce is already the baseline. Leading regional retailers and consumer brands operate across highly integrated commerce systems that connect platforms, channels and physical stores, meeting customers wherever they are and connecting discovery, engagement and purchase into a continuous flow. In this environment, the ability to connect, sequence and operate across dense platform ecosystems and personalise at scale has become a core competitive capability.

Digitally fluent customers and commercial ecosystems put Asia Pacific businesses in a strong position to lead the development of agentic commerce. Already today, 74% of consumers are using AI to discover, compare and learn about products and prices, but almost half are reluctant to complete transactions without stronger security assurances.<sup>2</sup> While innovators and first movers are demonstrating what agent-enabled retail could look like, more needs to be done across the foundations of technology and business model, as well as governance, security and trust. A large portion of the industry now faces pressure to adapt quickly as consumer behaviours shift, platforms evolve and AI begins to reshape the retail value chain.

Intelligent agents depend on real-time data, deeply interconnected platforms, high-velocity operations and digital processes – foundations businesses across Asia Pacific have spent the past decade building. As AI moves from optimising commerce to actively participating in it, Asia Pacific is among the first regions where these capabilities are being embedded at scale. However, retail will always be a profoundly human experience. As AI is embedded into shopping, the winners will be those that can harness the technology to amplify, not replace, human connection and experience.



# Agentic AI is out of the lab: The agentic trends already reshaping retail in Asia Pacific

AI isn't hitting the consumer sector in one big bang – its impact is shaped as much by customer readiness and investment appetite as the maturity of the technology itself. Deloitte's State of AI research shows Asia Pacific consumer businesses are already moving well past pilots. More than half have live AI implementations across IT, cybersecurity, marketing, sales and customer support; and a third are already leveraging AI to transform their business models.<sup>3</sup>

Around 29% are adopting agentic AI today, this is expected to surge to 76% within two years. As agentic AI begins to rewire commerce, its impacts will be felt across markets, business models and operations. While different retail categories and consumer segments will be impacted in different ways, this chapter focuses on four themes that are shaping what comes next for consumer businesses.

## 1 Hyper-personal: autonomous intelligence driving engagement

Retail and consumer brands have quickly embraced AI to support marketing, sales and service from content generation to AI assistants. Now, agentic AI is redefining how customer engagement is shaped in real time by drawing on richer data, new interactions and continuous analysis to respond more precisely to individual customer needs. Rather than relying on static segments or predefined journeys, engagement can increasingly adapt as customers move across channels and moments.

As digital journeys and AI agents play a larger role in mediating brand-to-consumer relationships, the nature of loyalty may also begin to shift. With agents handling more of the transaction, brands will face a growing challenge: maintaining emotional connection and relevance. Customers still value experiences that feel considered and personal, and when used thoughtfully, hyper-personalised engagement can strengthen affinity. Lazada, for example, has embedded AI across the "4Ds" (discovery, dependability, deals and decision-making) to enhance e-commerce engagement.<sup>4</sup> While for store staff, richer customer insight delivered through connected devices opens new opportunities for truly personalised service.

Looking ahead, agentic technologies will raise expectations for customised engagement at every touchpoint – extending today's digital personalisation into the physical store and increasingly personalised omni-channel experiences.

Signals from digital touch points, voice interactions and in-store sensors, deepen customer understanding and allow recommendations, offers and fulfilment choices to evolve dynamically. When combined with automation and product-level intelligence, this enables personalisation that feels more relevant and timely – whether through smarter discovery, targeted retail media or tailored checkout and fulfilment experiences. At scale, agents help connect these signals across systems, turning insights into action as interactions unfold. Think dynamic meal pairings tailored to dietary needs or curated outfits ready in-store or for rapid delivery.

## 2 The agentic store: intelligence enters physical retail

As digital platforms, fast delivery and AI continue to redefine commerce, physical stores are competing to remain meaningful shopping destinations. In markets such as China, Singapore and India, some stores are already evolving beyond transactional spaces into environments where intelligence is embedded directly into the shopping experience. Electronic shelf-labels, intelligent shelving, digital store operations, and agent-driven workflows are no longer experimental efficiencies – they are the foundations of a new physical shopping experience. The agentic store goes beyond convenience: it is experiential, seamlessly omnichannel, and increasingly shaped by AI systems designed to enhance both operational performance and customer engagement.

Inside the store, AI is posed to transform both what customers experience and how frontline teams work. Customers encounter more responsive environments – from dynamic pricing and personalised retail media to easier navigation and more relevant recommendations. At the same time, store teams are supported by connected devices that surface real-time customer and operational insights and guide daily tasks, helping them focus less on routine execution and more on customer interaction.

Increasingly, agents support store operations by monitoring performance, managing stock, streamlining replenishment and resolving issues proactively as they arise.

Singapore's FairPrice supermarkets demonstrate that agentic retail is already driving measurable results, from larger basket sizes to higher operational efficiency.<sup>5</sup> Smart Carts help customers navigate the store, surface recommendations and deliver real-time promotions. An 'endless aisle' expands in-store access to an extended online assortment. For employees, visual AI and the connected 'Grocer Genie' automate routine tasks and direct teams toward higher-value activities; while integrated digital systems give managers continuous performance insight and data-driven store optimisation.

The store of the future is no longer defined by its physical footprint. As these capabilities converge, rather than standing alone it becomes a connected part of a wider retail system – one that connects digital engagement, in-store experience, and the full retail supply chain into a unified, responsive whole.



### 3 Agentic operations: rewiring the retail engine

While AI is changing how consumers shop, its most immediate impact is being felt inside the retail engine itself. Behind the scenes, intelligent agents are beginning to take on responsibility not just for individual tasks but coordinating decisions and actions from forecasting, inventory, pricing, fulfilment and customer services. This marks a shift from supporting work to actively shaping how it flows across the enterprise (Figure 1).

Many leading Asia Pacific omnichannel retailers already run some of the world's most complex commerce engines and vast fulfilment networks that demand machine-assisted coordination. During peak events, such as Single's Day 2025, some of the largest e-commerce platforms process over a billion transactions in a day. Agentic operations represent the next step, moving from optimisation within functions to coordination across them. JD.com, for example, is leveraging AI across its business, including across smart logistics and manufacturing to bring products closer to its

customers. It has integrated over 14,000 AI agents across its operations, including specialised digital workers such as a Demand Agent, Operations Agent, Customs Agent and Courier Assistant to enhance and automate key steps from manufacturing through delivery. These agents now handle over 18% of all work tasks across its retail, logistics, healthcare and industrial sourcing functions.<sup>6</sup>

For retail and consumer brand leaders, agentic operations represent more than a near-term productivity lever, it signals a deeper reset of how work gets done. As agents take on greater responsibility for execution, competitive advantage shifts toward the strength of data foundations, the maturity of process automation, the ability of systems to work together. Over time, success will depend less on optimising individual processes and more on designing organisations where human intent sets direction and agents coordinate and act at scale.

Figure 1: Agentic AI's applications across the retail and FMCG value chain

Research and development	Manufacturing	Sales and marketing	Supply chain management	Retailer and distribution	Enabling areas
Autonomous product innovation	Autonomous quality control	Multi-channel campaign orchestrator	Demand forecasting agent	Shelf stocking assistant	Autonomous finance analyst
Smart experimentation	Predictive maintenance agent	Dynamic pricing agent	Inventory balancer	Planogram compliance checker	HR talent scout
Patent landscape navigator	Production scheduling optimiser	Sentiment-driven brand manager	Logistics route optimiser	Retail forecast collaboration agent	Compliance and risk monitoring agent
Consumer sentiment synthesiser	Energy efficiency advisor	Autonomous content creator	Supplier risk monitor	Autonomous retail order management	Cybersecurity sentinel
Sustainability optimiser	Waste reduction agent	Retailer-specific offer optimiser	Autonomous procurement agent	Autonomous sales beat planning	ESG reporting agent
AI-driven competitive analysis	AI-driven process optimisation	Autonomous customer segmentation	Disruption detection and mitigation agent	Geo-targeted promotion agent	Legal contract review agent

Source: Deloitte, The business imperative for agentic AI, 2025

### 4 Shopping agents: the new agentic customer

Shopping agents or 'shopping bots' are emerging as one of the most visible expressions of agentic commerce, with early signs that they could reshape how customers discover products and how value flows through retail ecosystems. Consumers are already using AI to search, compare and evaluate options, and in some cases to complete purchases on their behalf. As these capabilities mature, shopping agents are beginning to move beyond simple transactions toward ongoing delegation – managing replenishment, subscriptions, budget optimisation and even brand choices over time.

For retailers and brands, this signals a meaningful shift in how shopping journeys are initiated and completed. Industry forecasts suggest a growing share of activity may be influenced or handled by agents in coming years, as much as 25% of global e-commerce sales by 2030.<sup>7</sup> Deloitte's research found that nine in ten retail executives expect AI to be increasingly used instead of search engines in 2026, while half expect today's multi-step shopping journey to collapse by 2027.<sup>8</sup> While two-thirds of retail leader's surveyed by Deloitte do not expect customers to fully embrace agents purchasing on their behalf before 2028 – search, comparison and AI-powered recommendations are more imminent.<sup>9</sup> The familiar path from discovery to purchase may increasingly be compressed or bypassed altogether and increasingly shift discovery, decision-making and checkout from retailer-owned channels to AI intermediaries. Eighty-one percent of retail executives Deloitte interviewed believe this shift will weaken brand loyalty.<sup>10</sup>

While agentic shopping is still in its infancy in Asia Pacific, the direction of travel is clear. Alongside the growing use of general AI tools such as ChatGPT for product discovery and comparison, leading regional platforms are already beginning to embed agents into everyday commerce environments. In China for example, Alibaba is integrating Qwen AI across its ecosystem, enabling users to discover products and place orders through a single conversational interface.<sup>11</sup> While Google's announcement of its Universal Commerce Protocol at NRF 2026 underscored how quickly agent-led commerce is moving from experimentation into the core infrastructure of global retail.<sup>12</sup>

In a region defined by platform ecosystems, super-apps and embedded commerce, these early deployments provide a first view of how shopping bots could redefine customer relationships, platform power and competitive advantage. Even as agents take on more of the purchasing journey, behind each transaction is still a person – and meeting their needs and wants will remain at the heart of the consumer industry. As agents become a gateway to the consumer, Asia Pacific retailers and brand teams should act now to ensure their products and services are discoverable and compelling to both machines and people.



## Competing in the age of agentic commerce

For Asia Pacific retailers and consumer brands, this moment presents both a powerful opportunity to lead, as well as significant disruption and risk. Agentic commerce has the potential to unlock new levels of productivity and personalisation, while also enabling Asia Pacific businesses to extend their influence globally and export not only their products, but also their operating models, services and standards to the rest of the world.

Yet the threat of a “winner-takes-all” scenario is real, where dominant platforms could control critical data and customer relationships. Emerging agentic commerce models could undermine progress and marginalise local businesses if shopping bots favour large, established players.

Currently, how the future unfolds – which models will prevail, how fast behaviours change, and how value is ultimately distributed – remains unclear. What emerges clearly is that competitive advantage will lie with the businesses that invest now in their data, operating models, skills and partnerships. The choices leaders make will determine who remains visible in agent-mediated markets, who captures value, and how resilient and inclusive retail ecosystems across Asia Pacific become.



## Six imperatives for Asia Pacific retail and brands leaders

### Get the foundations right: data, interoperability and trust

1

The possibilities of agentic AI seem limitless – until businesses encounter the limitations of their data. AI agents rely on structured, accurate, real-time data to effectively reason, coordinate and act. As agents get to work, organisations must shift from traditional data and analytics governance to continuous, policy-driven data management to ensure safe and compliant autonomous action. Building agent-ready foundations is critical to scale intelligence, connect with emerging ecosystems and, most importantly, earn the trust required to compete in agent-mediated markets. This means unifying product, customer, inventory and operational data, while embedding governance, security and transparency from the outset.

### Design around behaviour, not just channels

2

Consumers already navigate fluid paths across social platforms, marketplaces, super-apps and stores. AI agents will increasingly operate in these fragmented environments, so retailers must build engagement models that reflect how people (and agents) discover, evaluate and buy across platforms. Success will depend on how well businesses can integrate human experiences, physical retail and intelligent systems into one seamless, intuitive ecosystem.<sup>13</sup>

### Reinvent core operations for autonomy and speed

3

To keep pace with agentic commerce, core retail functions must evolve to enable retailers to sense demand, monitor supply and act in real time across increasingly complex networks. The effectiveness of agents – and their ability to manage tasks end-to-end across an organisation – depends on the foundations they can access, from high-quality data and system connectivity to embedded process automation. Agentic AI accelerates this shift, enabling forecasting, inventory, pricing and fulfilment to operate as interconnected, adaptive capabilities rather than isolated functions. Success will depend on shifting from efficiency-driven operations to co-ordination across the enterprise – where humans set intent and guardrails and agents execute at speed across the value chain.

### Differentiate through human connection and value

4

Success in the future of retail will depend on being discoverable, trusted and preferred by both consumers and their autonomous agents. Brands must work hard to remain an omnipresent, valuable part of consumers' lifestyles, ensuring products and services truly resonate with their values and needs. In markets, where social commerce, livestream and creator-led ecosystems are central to shopping behaviour, relevance is built through community, culture and participation. Technology plays a crucial role, but its true purpose is to enhance the human connection at the heart of every great retail experience.

### Reinvent physical stores as experience-driven destinations

5

Future stores will undoubtedly need to integrate the use of agents in omnichannel experiences, but they must also differentiate and provide something new. To outplay the convenience of emerging digital agent experiences or dark stores and fast delivery, stores need to entertain, delight and reward shoppers. In Asia Pacific's experiential and community-driven retail cultures, the retailers who lead will be those who reposition stores as intelligent, social and sensory-led environments in an increasingly automated retail landscape.

### Embrace the evolving agent ecosystem

6

Retailers are adapting to a rapidly shifting ecosystem, where hyperscalers, AI providers, and new technology providers are increasingly blurring industry boundaries both as partners and competitors. As enterprise platforms, retail systems, hardware vendors and emerging agentic tools converge, the partner landscape is becoming more fragmented. To innovate and remain resilient, retailers need to map technology dependencies, reassess partnerships, and enable rapid experimentation – all while maintaining robust governance and security. With no common standards or interoperability frameworks yet in place, a modular and flexible approach is essential to move at pace and to limit single vendor reliance or partner lock-in.


## Technology is essential, but only part of the equation


Many organisations still approach AI as another technology initiative, even as agentic AI begins to reshape how work, decisions and accountability are structured. Successful integration requires businesses to fundamentally rebuild their business, operating and talent models to enable seamless human-agent collaboration.


While some leaders are forging ahead, the reality for many retailers is a widening gap, as agentic AI advances faster than they can adapt. In this rapidly evolving environment, organisational readiness is a core differentiator – enabling businesses to build trust, embrace ambiguity and scale learning faster than the pace of technological change.<sup>14</sup>


For consumer-facing businesses, agentic commerce must be built with trust by design, reflecting consumer interests, privacy and security expectations and regulatory oversight. As agents begin to act for both customers and enterprises, organisations must intentionally test and govern their actions to understand their risks and outcomes. In the end, trust and security, not technical sophistication alone, will shape customer adoption and regulatory responses.


Currently only around 30% of Asia Pacific consumer businesses report 40% or more of their AI initiatives reach production, and implementation challenges are one of the top barriers.<sup>15</sup> Shifting from experimentation to enterprise-wide transformation requires both strategic vision and practical discipline. To succeed, organisations must achieve systematic transformation across seven critical dimensions:


- 


**Unified Data Foundation:** Creating integrated data ecosystems that break down silos between online and offline channels, enabling real-time insights across all touchpoints.
- 

**AI-First Mindset:** Shifting from reactive to predictive operations, where AI anticipates customer needs, inventory requirements, and market trends before they manifest.
- 

**Prepare for Agent Customers:** The shift to agentic commerce and operations requires a redesign of product and service experience and data – retailers and brands will need end-to-end journeys for the agents as well as humans.
- 

**Agile Experimentation:** Implementing rapid testing frameworks that allow retailers to pilot AI solutions, measure impact, and scale successful innovations quickly.
- 

**Talent and Upskilling:** Developing workforce capabilities to work alongside AI systems.
- 

**Trust and Governance:** Building transparent AI systems that comply with evolving regulations while maintaining customer trust through ethical data use.
- 

**Ecosystem Partnerships:** Creating collaborative networks that leverage AI capabilities across suppliers, logistics providers, and technology partners.

## The way forward

The transformative power of agentic AI to reshape business models and customer behaviour is only just beginning – and no one can predict yet what its full impact will be.

However, a fundamental reconfiguration of the commerce landscape is underway and Asia Pacific sits at its epicentre. In this moment of uncertainty and opportunity, the region's consumer businesses' gain advantage not from scale alone, but from their ability to move first, experiment at speed, and shape global models rather than inherit them.

The future of commerce will belong to leaders that address the opportunities and challenges of an agentic future head-on. Success will favour organisations that are quick to establish strong foundations across their data, technology, workforce and partner ecosystems – while keeping customers and trust at the centre of change and new business models.

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