



Marketplace seller trends report 2026

How sellers are balancing marketplace growth, profitability, and performance



The inside track from brands and retailers

For this second annual sellers’ report, we surveyed **550 marketplace ecommerce decision-makers** in France, Germany, the Netherlands, the UK and the USA to explore how marketplace sales strategies have evolved over the last 12 months.

Compared to 2025, **this year’s data tells a story of performance and profitability**. With marketplace selling now mainstream, this report shows how operating at scale has become today’s defining challenge, and why **efficiency is now as important as expansion**.

Focusing exclusively on marketplace commerce, we offer insights into sellers’ operational challenges, how success is measured, their aspirational initiatives – and where AI fits in tomorrow’s operating model.

Research was conducted by Sapio Research in June and July 2026 via online survey.

Country of residence



Selling method

1P sellers	36%
3P sellers	25%
Both / Hybrid model	39%

Revenue

Revenue (EUR / USD)	% of respondents
€0M to under €50M \$11M to under \$55M	34%
€50M to under €500M \$55M to under \$550M	52%
Over €500M Over \$550M	14%

*USD conversions are approximate, based on an exchange rate of €1=\$1.10. Respondents reported their revenue in EUR.

Role

Role	% of respondents
Manager / Senior Manager / Head of Dept	31%
Director / VP / SVP	29%
C-level executive / Owner / Founder	40%

Brands vs Retailers



- A brand selling its own products
- A retailer / reseller of third-party products only
- A retailer / reseller of its own brand and third-party products

The state of marketplace selling in 2026

Key trend shifts from 2025 to 2026

	2025	2026	Trend
 Sellers active on 7+ marketplaces	34%	39%	▲
 Sellers who expanded into 2–3 new marketplaces this year	Not measured	49%	NEW
 Top priority: Implement AI	Not measured	#1 (26%)	NEW
 Top priority: Boost profitability	#3 (27%)	#2 (25%)	▲
 Top priority: Expand to more marketplaces	#4 (27%)	#8 (19%)	▼
 Success metric: Profit margin per marketplace	#2 (31%)	#1 (33%)	▲
 Success metric: Net sales	#1 (33%)	#3 (29%)	▼
 Time spent on manual operations (avg)	36%	32%	▼
 Sellers active on TikTok Shop	Top 5 in UK & US only	55% across all markets	▲

The 2026 data points to a new phase in the growth story. **Marketplace selling has matured**, and with that maturity comes a shift in what sellers are optimizing for.

The standout shift from 2025 to 2026:

Profit margin per marketplace has overtaken net sales as the **#1 success metric**. That shift in mindset runs through almost every finding in this report, from the changing shape of expansion to the growing role of AI and automation.



This year's
5 key findings,
at a glance



Sellers are scaling smarter, not just wider

39%

of sellers are now active
on 7+ marketplaces

▲ +5pp from 2025

Implementing AI and boosting
profitability now ranking above adding
more channels.

Manual work still dominates

3 in 5

organizations manage
their business mostly
manually or with only
partial automation.



37% cite higher operational costs as the biggest
impact, while 34% say manual processes slow
marketplace expansion.

Profitability has overtaken
sales volume as #1 metric

#1 Profit
margin

per marketplace
is now sellers' top
success measure

External pressure
Fees + Shipping

Internal pressure
Inefficiencies

=

Margin pressure

TikTok Shop crossed into the mainstream

55%

of sellers are now active on
 TikTok Shop

- Mar 2025
- Jun 2026

France and Germany launched with both
markets seeing significant adoption.
The Netherlands launched and is already
following the same trend.

AI has moved from interest to
implementation

82%

organizations
are actively
integrating AI or
adopting tools

However, adoption remains largely supportive
rather than transformational.



Customer
service



Reporting

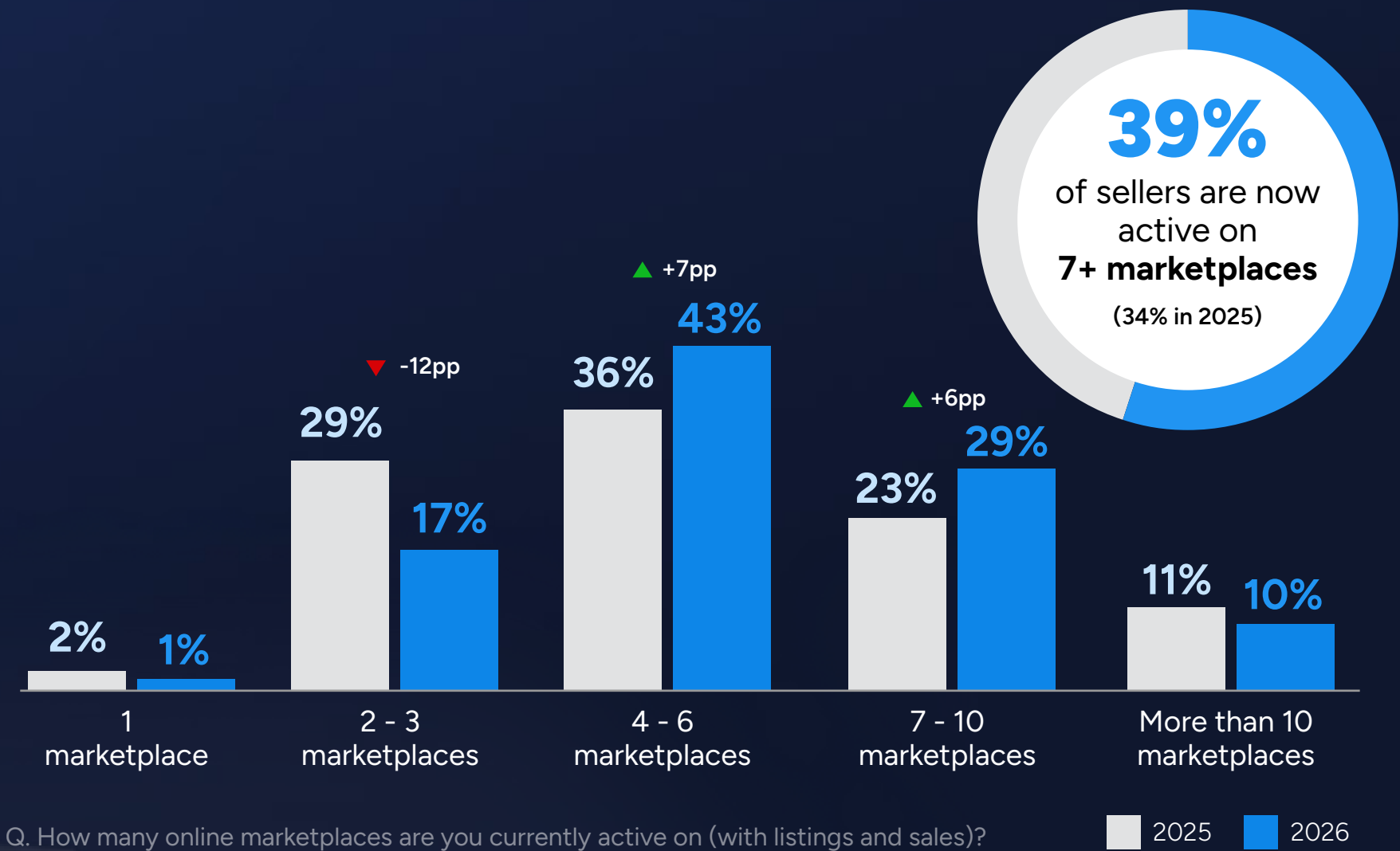


Analysis

How many marketplaces are sellers active on?

Marketplace ecommerce has expanded significantly over the last twelve months. The proportion of sellers active on 4-6 marketplaces has increased by 7 percentage points since 2025, while the proportion active on 7-10 has risen by 6 percentage points. **Nearly four in ten sellers (39%) are now active on 7 or more marketplaces.**

And sellers are continuing to expand. When asked separately **how many new marketplaces** their organization had expanded into over the past 12 months, **49% said they had added two or three.**



Seller profiles

Brands make up the largest share of sellers surveyed, with 58% selling their own products. A further 19% are retailers or resellers selling third-party products only, while 23% sell a combination of their own and third-party products.

58%

Brand selling its own products

19%

Retailer / reseller of third-party products only

23%

Retailer / reseller of own and third-party products

Amazon first and social climbing fast

Amazon continues to dominate as the marketplace of choice, followed by domestic players. But social commerce is having an increasing impact on the international landscape.

	 US	 UK	 Germany	 France	 Netherlands
#1	amazon	amazon	amazon	amazon	amazon
#2	Walmart	ebay	ebay	ebay	bol.
#3	ebay	TEMU	OTTO	cdiscOUNT	DECATHLON
#4	TARGET	next	zalando	FNAC DARTY	zalando

Amazon figures reflect activity across all Amazon marketplaces, not exclusively the domestic one. Local marketplaces may still lead in domestic seller adoption within each market.

Q. Which of the following marketplaces do you currently sell on? Select all that apply.

55%
of sellers are now
active on  TikTok Shop



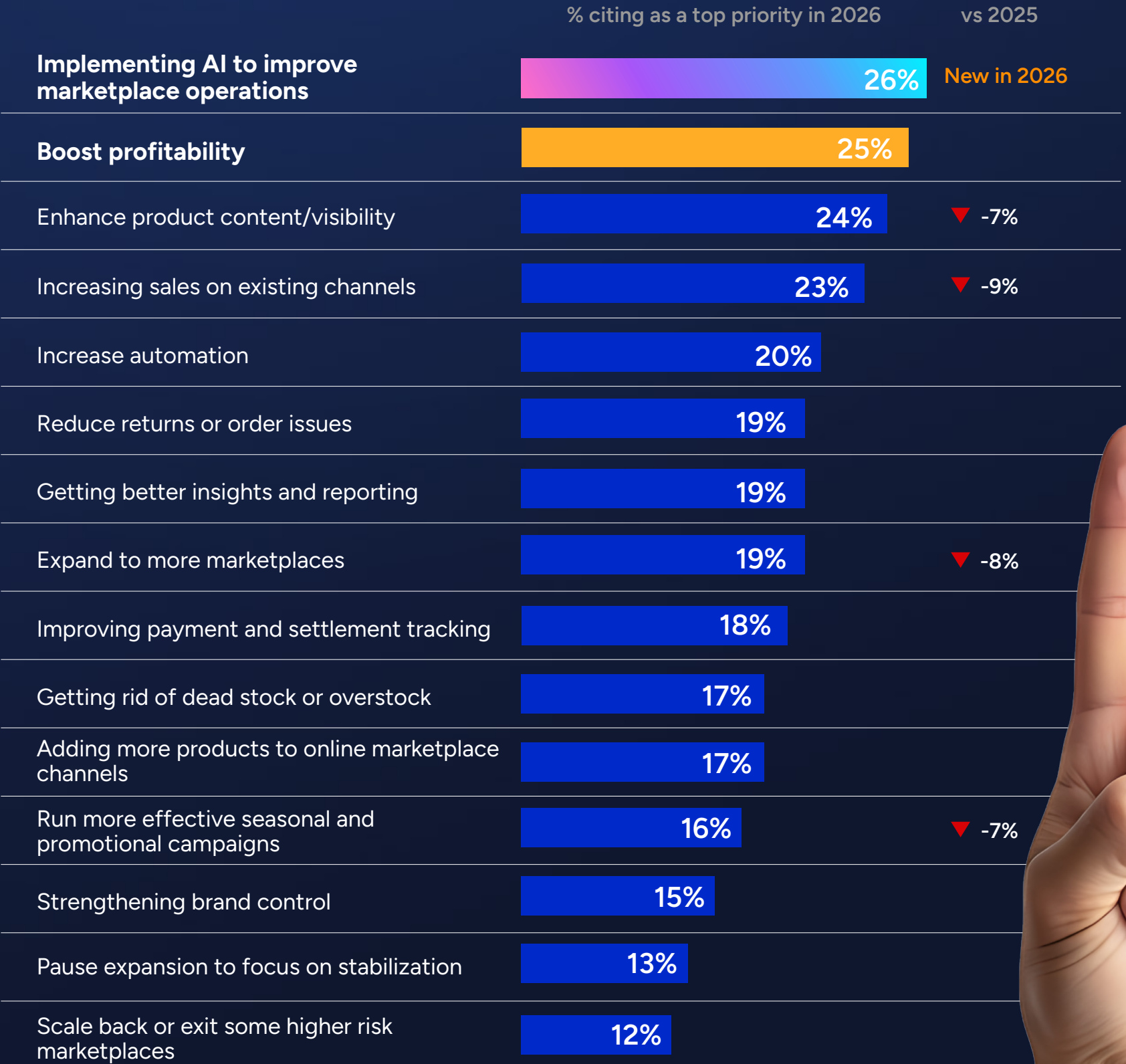
Either domestically or internationally - a sign that **social commerce has moved well beyond test-and-learn into a serious sales channel**, particularly in categories where visual demonstration, fit, and inspiration drive purchase decisions.

Compared with last year, TikTok Shop was the standout mover: it nearly doubled its seller base in the UK and climbed three places in the US marketplace rankings, making it the fastest-rising channel across both markets.

Adoption has moved fast. The UK, live since 2021, is the most mature market, while France and Germany have gained meaningful traction since launching in March 2025.

With the Netherlands only launching in June 2026, the 55% figure is primarily a US, UK, France, and Germany story, and one worth watching as Dutch sellers gain access for the first time.

Q. What are your top 3 priorities when it comes to ensuring success in your marketplace selling in the next 12 months?
(Select up to three)



AI and profitability have overtaken expansion as sellers' #1 priorities

Sellers' top priorities for the next 12 months reflect a market in transition. Implementing AI and boosting profitability lead the list, alongside improving product visibility and increasing sales on existing channels.

Rather than rapidly expanding their marketplace presence, brands, resellers, and retailers are **increasingly focused on making existing operations more efficient, profitable, and sustainable.**



The automation gap

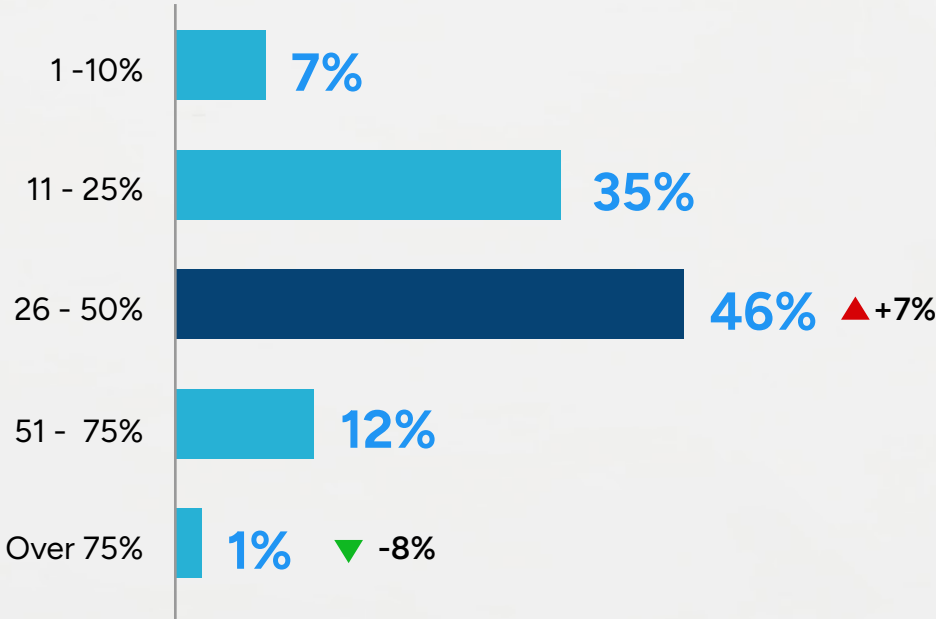
Where sellers want to be vs. where they are

The amount of time organizations spend on manual marketplace operations **has decreased marginally**, from an average of 36% in 2025 to 32% in 2026.

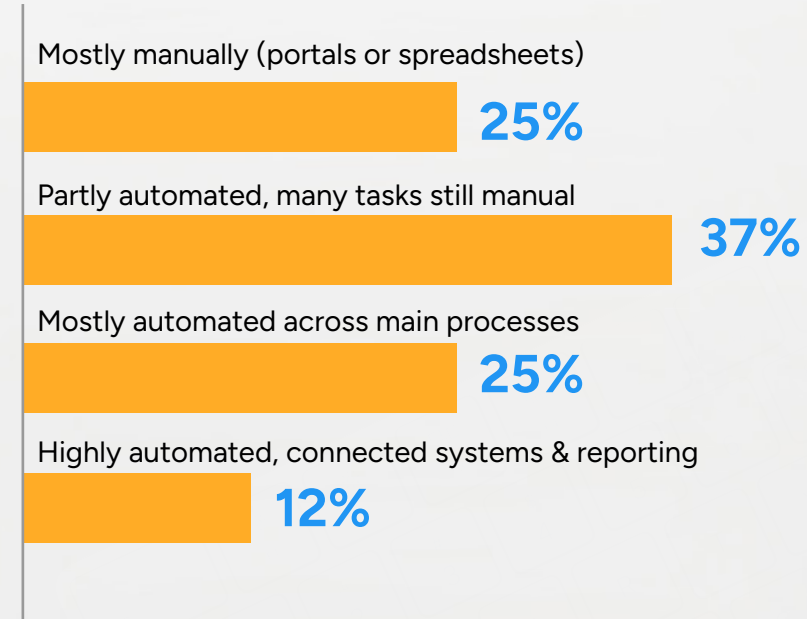
But the overall burden remains high - **nearly half of organizations spend 26–50%** of their working week on manual tasks, and the problem compounds with scale: Among those managing 10+ marketplaces, nearly a quarter spend over half their time on manual operations.



Q: Approximately, what percentage of your team's weekly marketplace operations relies on manual work (without automation)? Select one.



Q. Which statement best describes how your organization currently manages marketplace operations, across listings, inventory, pricing, and orders?

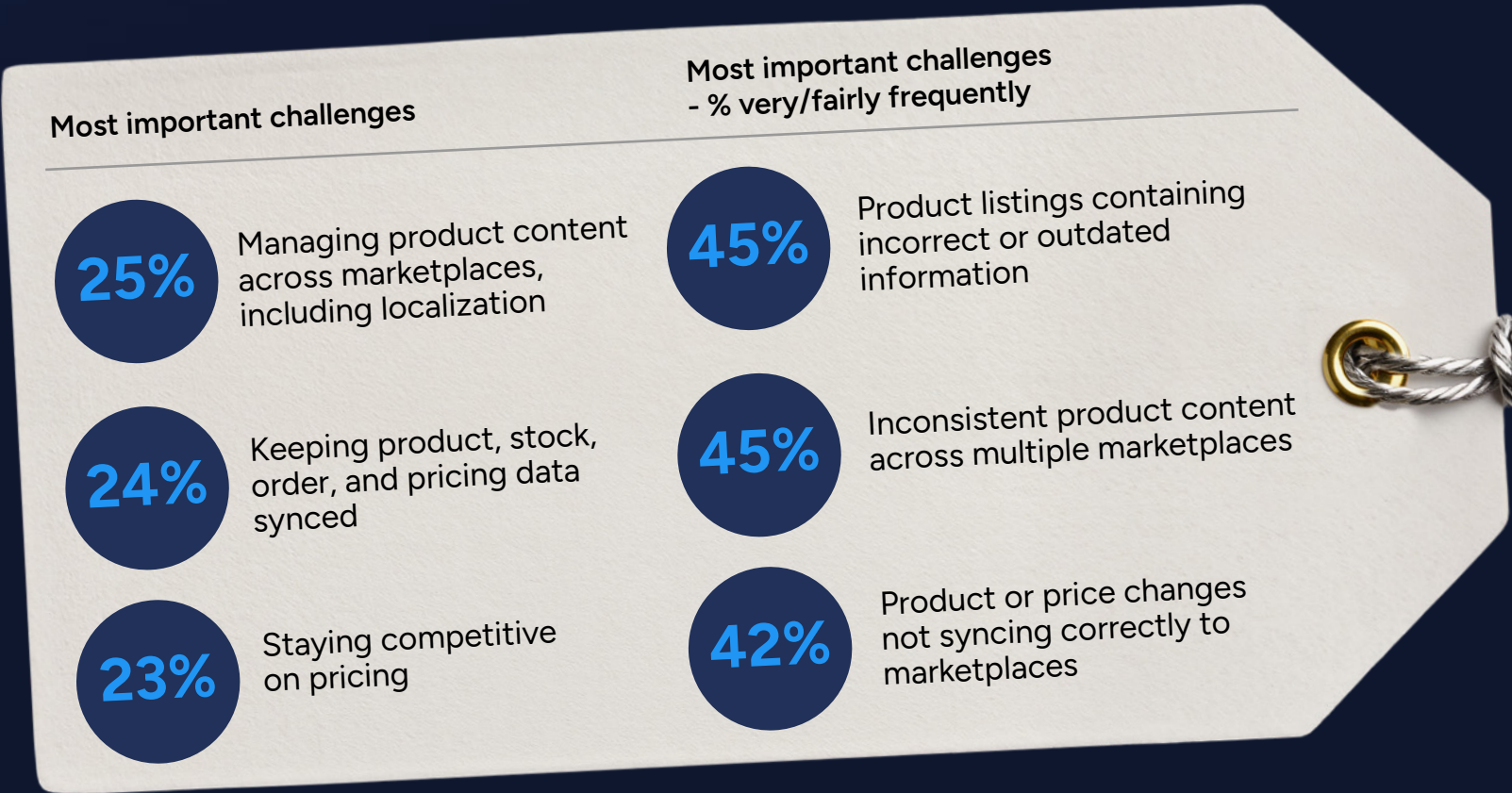
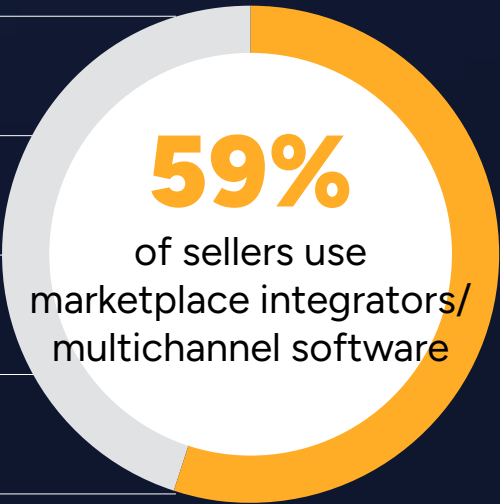
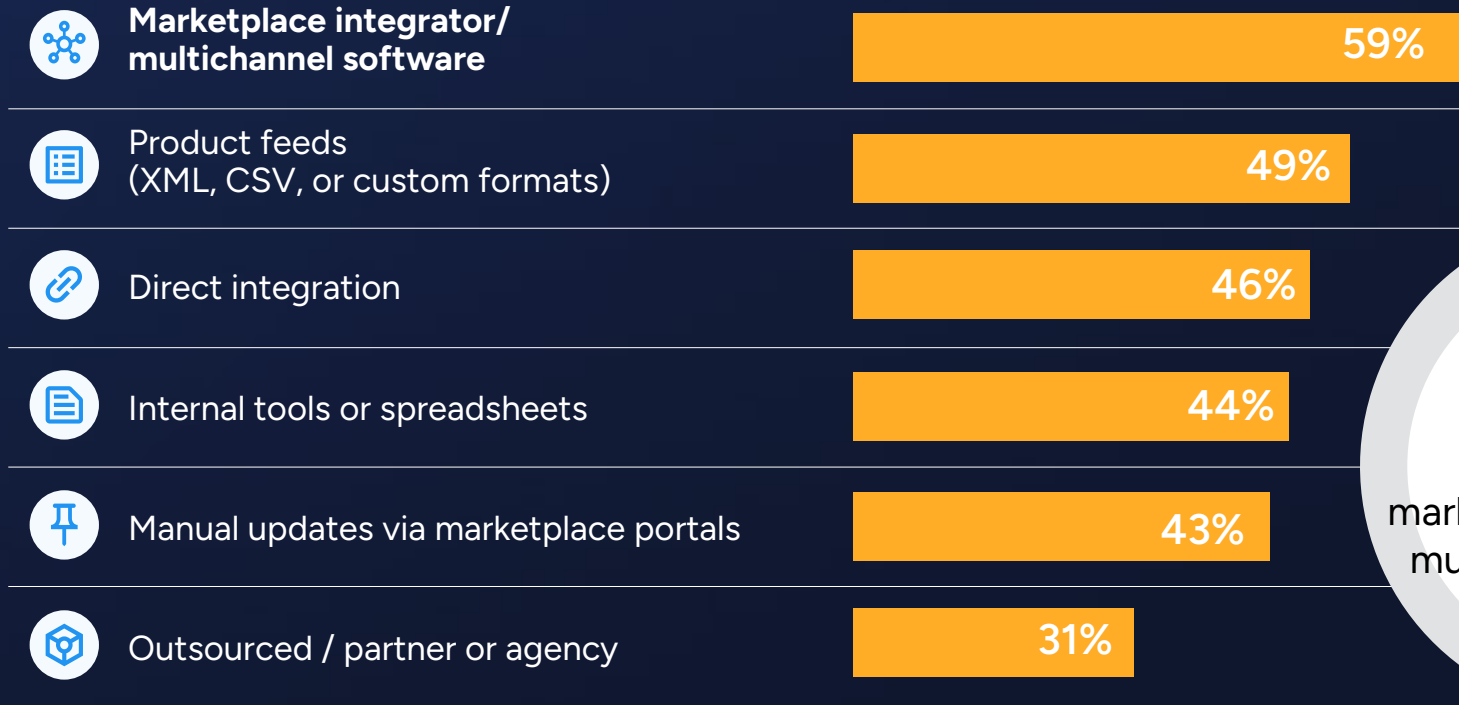


Product content & pricing remain a key pressure

Marketplace integrators are the most common way sellers manage product content and pricing, used by 59%, but they rarely work alone. Internal tools and spreadsheets (44%), direct integrations (46%), and manual portal updates (43%) are all still in play alongside them, reflecting the patchwork nature of most sellers’ setups.

That patchwork has consequences. The 3 most common operational challenges sellers face are all product and pricing data problems - and they’re happening very or fairly frequently.

Q: How do you currently manage product content and pricing updates? Select all that apply.



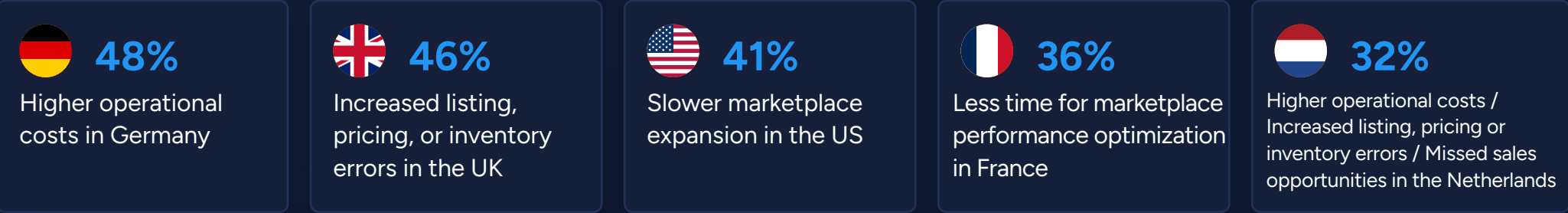
The true impact of manual work

Higher costs, missed sales, slower launches

The downstream impact goes well beyond data accuracy. **Higher operational costs (37%)**, **slower marketplace expansion (34%)**, and **increased listing, pricing or inventory errors (33%)** are the most cited business consequences, but sellers also report **less time for performance optimization (32%)**, **missed sales opportunities (30%)**, and **slower product launches (29%)**.

The top impact varies by market. US sellers rate slower marketplace expansion as the biggest consequence of manual operations, while French sellers cite less time for performance optimization as the most significant effect.

Top impact by market:



Q: What are the biggest business impacts of manual marketplace processes on your organization? (Select up to three).

What's squeezing marketplace margins?

Protecting margin in the face of competition on price has been sellers' **biggest challenge** when it comes to marketplace profitability in the last year, reflecting the proliferation of marketplace selling. But the margin pressures don't all come from the same place, and that distinction matters for how sellers and retailers respond to them.

External pressures leave sellers with limited levers: channel selection, fee negotiation, and pricing strategy.

Internal pressures are within reach to fix: manual processes, delayed listings, inventory issues, and high return rates all eat into margin.

Together, these findings may explain why profit margin per marketplace has overtaken net sales as sellers' #1 success metric in 2026. **When margin is squeezed from both directions, volume alone stops being useful.**

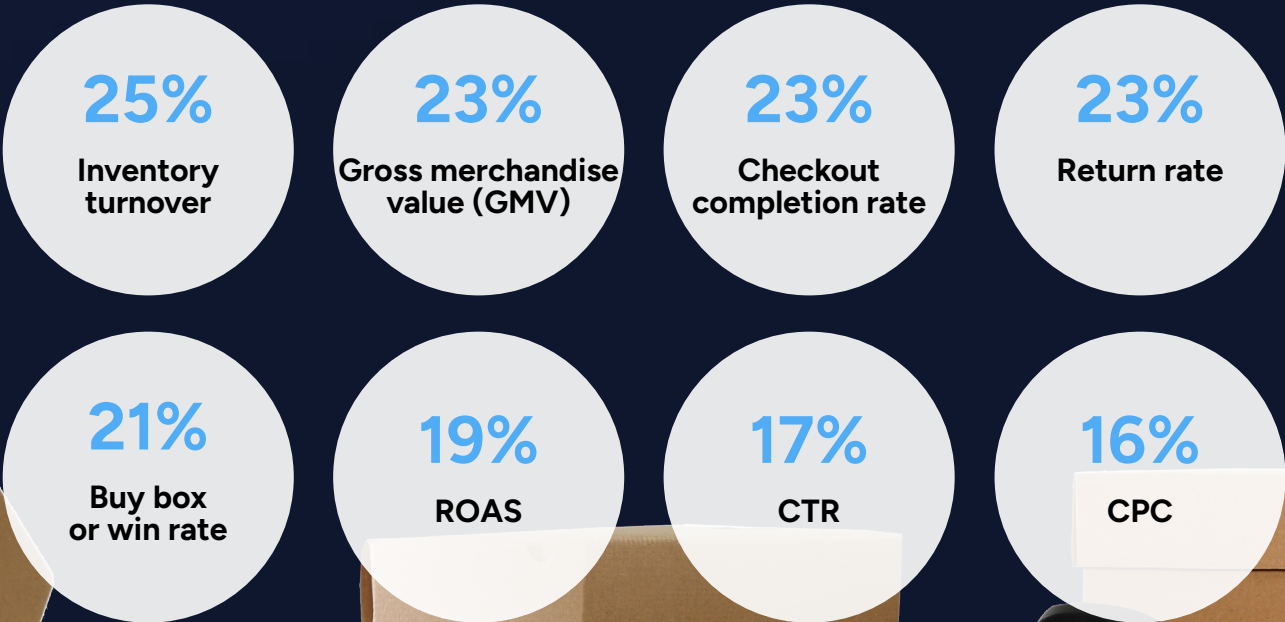


Metrics for marketplace success

Profit margin per marketplace, average order value, and net sales are the three most tracked metrics in 2026, but how sellers prioritize them depends heavily on who they are.

Brands lead with profit margin (33%) and net sales (30%). **Third-party retailers** flip the order: AOV tops their list at 36%. Retailers selling a mix of own-brand and third-party products prioritize profit margin most sharply of all, at 38%. Regardless of seller type, **margin is never far from the top.**

Q: What are the top metrics you track for marketplace success? Select up to three



	Brand	Retailer Third party products	Retailer Own brand/ third party products
1	Profit margin per marketplace 33%	Average Order Value 36%	Profit margin per marketplace 38%
2	Net Sales 30%	Profit margin / Checkout completion rate 28%	Net Sales 32%
3	Average Order Value 29%	Gross Merchandise Value 25%	Average Order Value / Inventory turnover 27%

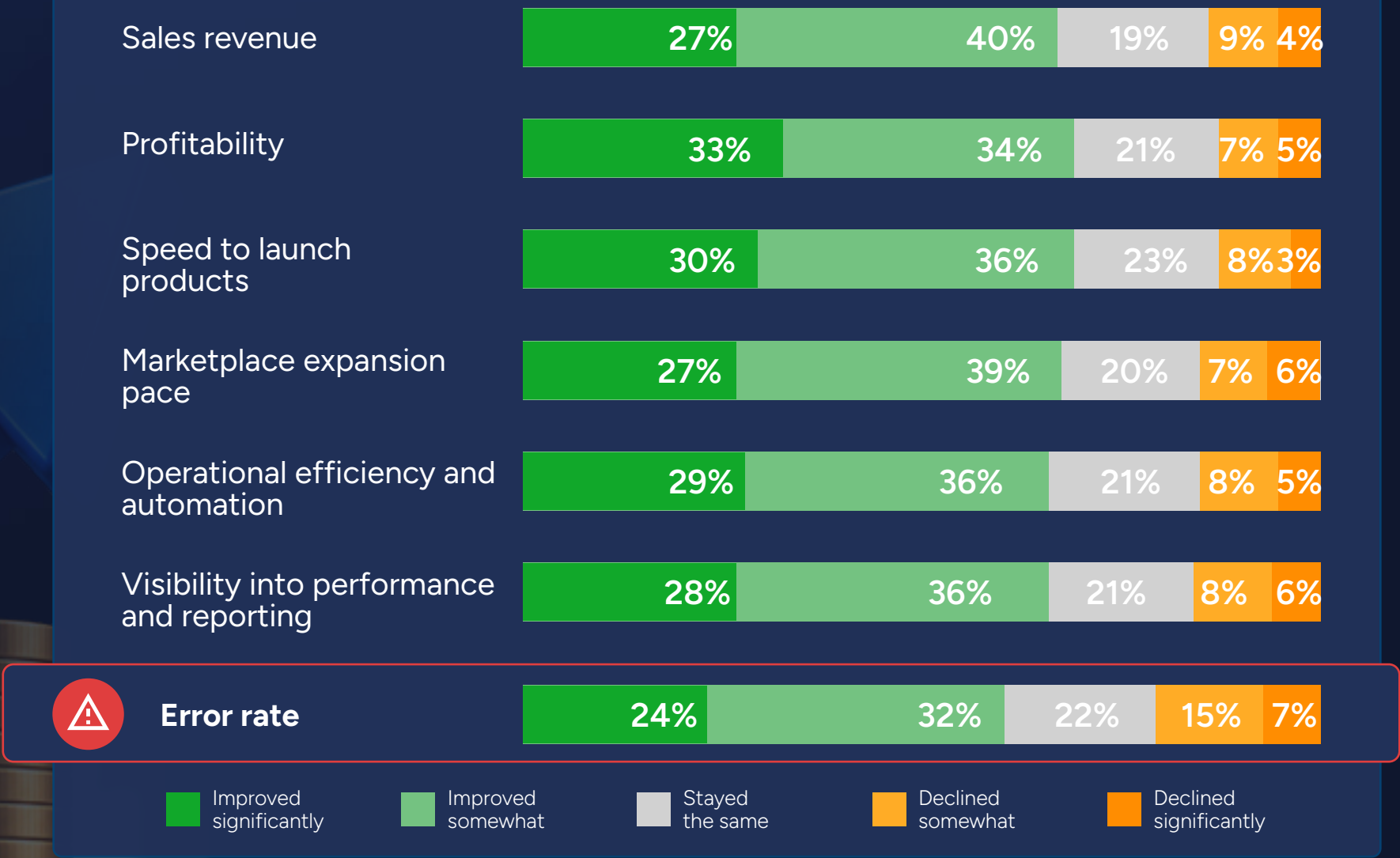
How performance changed over the past 12 months

Sellers report incremental gains, but operational challenges persist. Around two-thirds report at least some improvement across revenue, profitability, launch speed, marketplace expansion, operational efficiency, and performance visibility. However, **only 27 to 33% report significant improvement in these areas**, suggesting progress has been gradual rather than transformational.

Error rates show the least progress. Just 56% report an improvement, while 44% say error rates have stayed the same or worsened, reinforcing the continued challenge of maintaining operational accuracy at scale.

Performance improvements across key areas

Q: Compared with 12 months ago, how has your marketplace performance changed?



Percentages may not total 100% due to rounding.

If time wasn't a constraint, where would sellers focus?

We asked sellers which initiatives they would focus on if more time was available. **Using AI to drive marketplace growth and performance came out on top by a clear margin**, signalling where sellers believe the biggest untapped opportunity lies.

These aspirations also point to where the market is heading. When asked which shifts they are actively preparing for over the next 2–3 years, the answers are almost entirely **AI and social commerce**, the same themes sitting at the top of the “more time” list.

Profitable operations sit at the heart of today's marketplace strategy, as brands and retailers prepare for an AI-driven future.

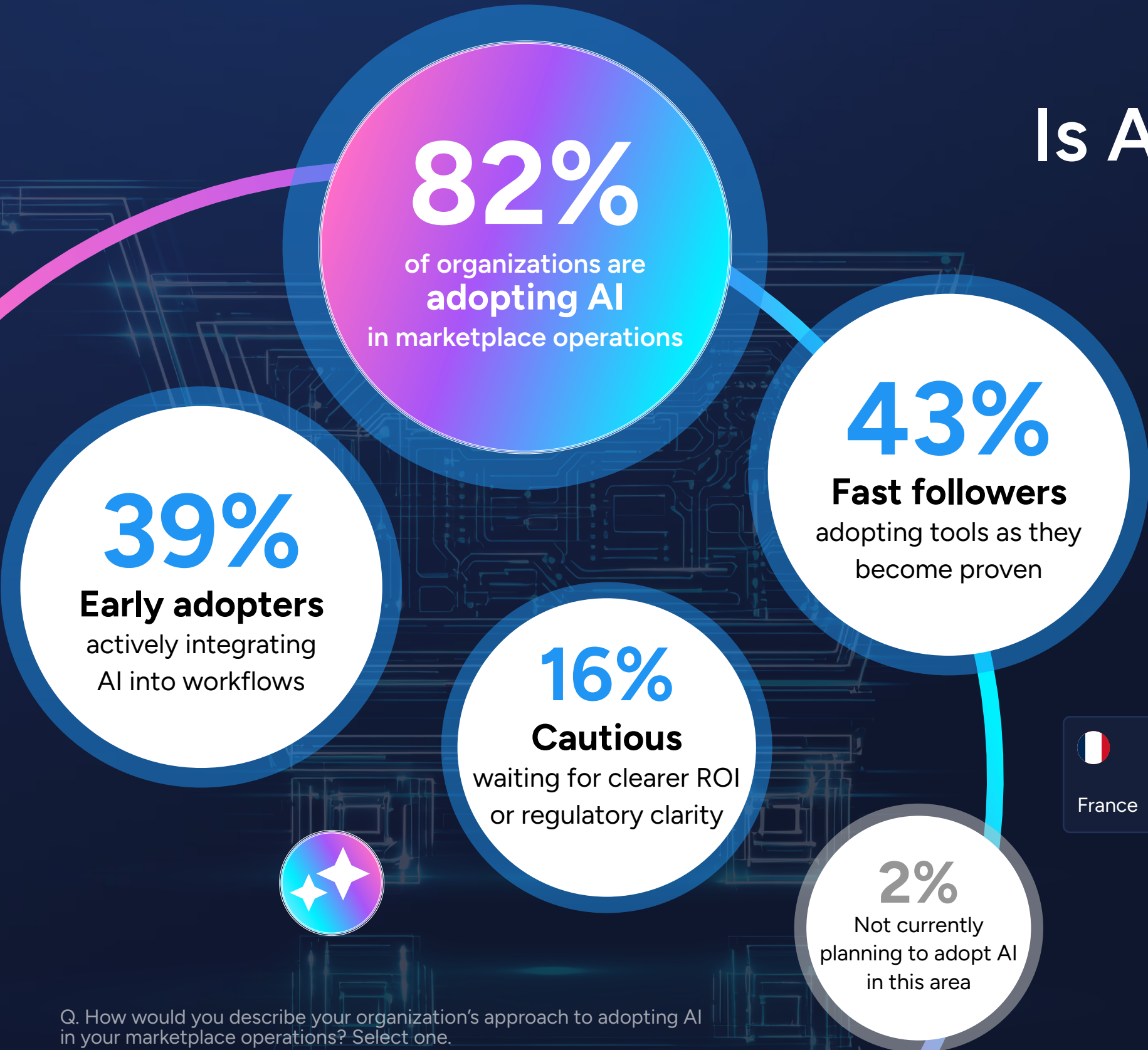
Q. If you had more time available, which of the following initiatives would you want to focus on most?



What sellers are preparing for over the next 2-3 years



Respondents could select multiple answers



Q. How would you describe your organization's approach to adopting AI in your marketplace operations? Select one.

Is AI transforming operations or just supporting them?

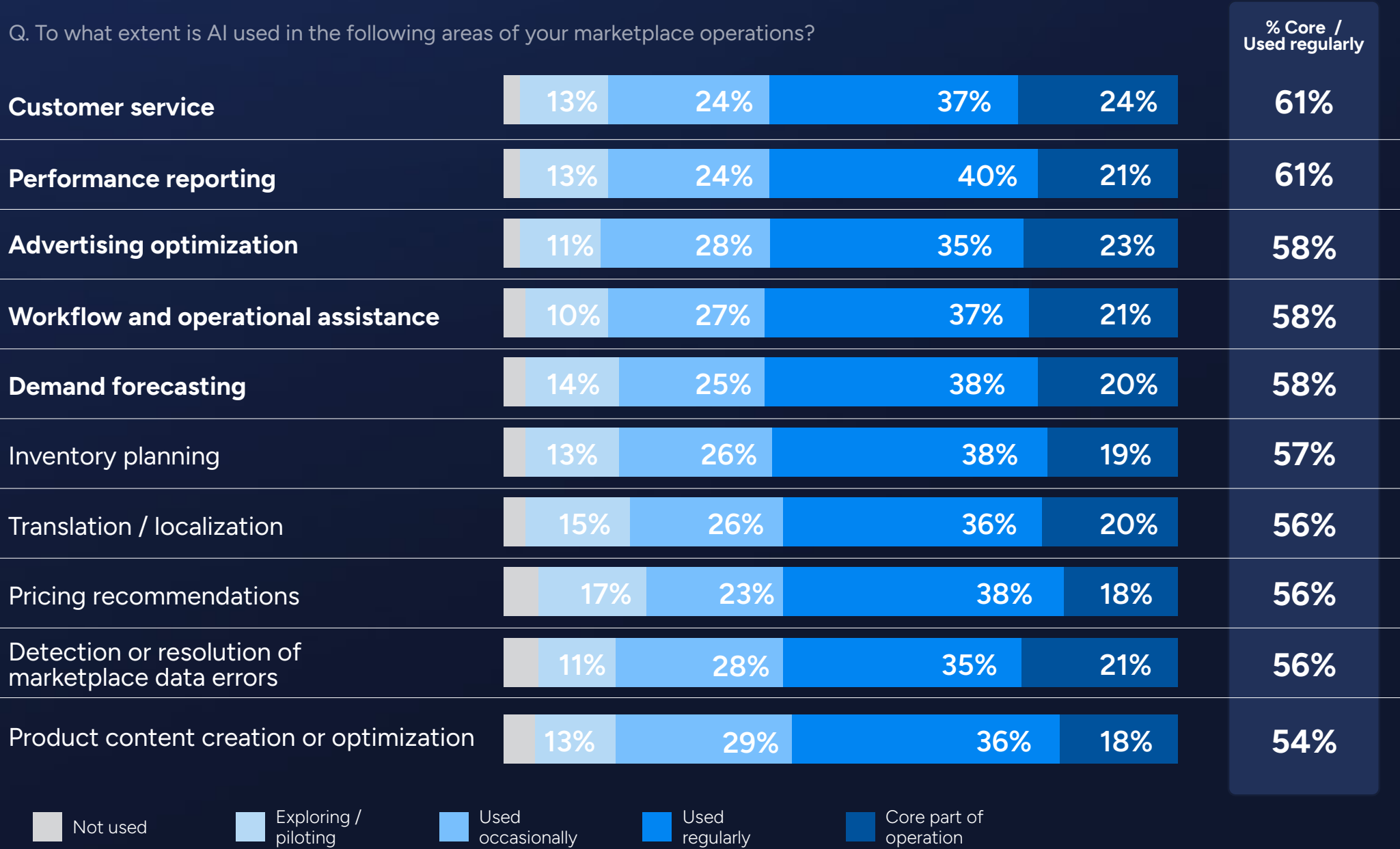
AI adoption is **shifting from experimentation to execution**. With **39% already integrating AI into workflows** and another **43% ready to adopt proven tools**, the market is moving beyond the question of whether to embrace AI. The focus is increasingly on **how quickly and how deeply to integrate it into marketplace operations**.

Sellers waiting for clearer ROI or regulatory clarity



Sellers in the UK show the most progressive approach to AI adoption, compared to their EU and US counterparts who indicate a preference for clearer ROI and/or regulatory clarity.

Where is AI actually being used in marketplace operations today?



Percentages may not total 100% due to rounding.
Segments ≤5% are not labelled for readability.

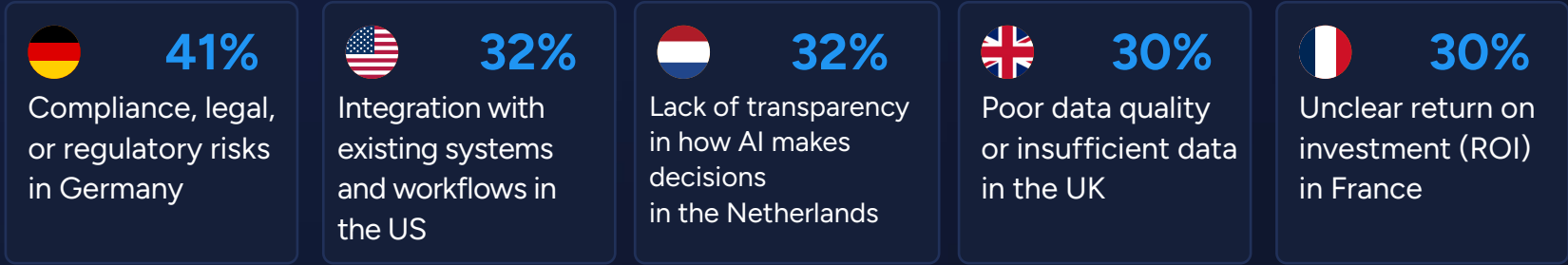
AI adoption is broad, but its role remains largely supportive rather than transformational. The areas where AI is most embedded - customer service, performance reporting, and advertising optimization - are all analytical or reactive functions. **AI is not yet ingrained in the operational core of marketplace management.**

Just seven percentage points separate the highest and lowest adoption rates (61% vs. 54%), suggesting sellers are deploying AI broadly rather than concentrating it in a handful of use cases.

Trust will determine the pace of AI adoption

The biggest barriers to deeper AI adoption are not about willingness - they're about confidence. Across all markets, sellers' concerns center on **risk, control, and reliability** rather than the technology itself.

What's striking is how evenly distributed these concerns are - no single barrier dominates. That suggests AI hesitancy isn't one problem to solve; it's several, and they vary by market.



Germany stands out - compliance and regulatory risk is the top concern at 41%, well above the overall figure of 31%, reflecting the broader regulatory environment shaping AI adoption across the market.

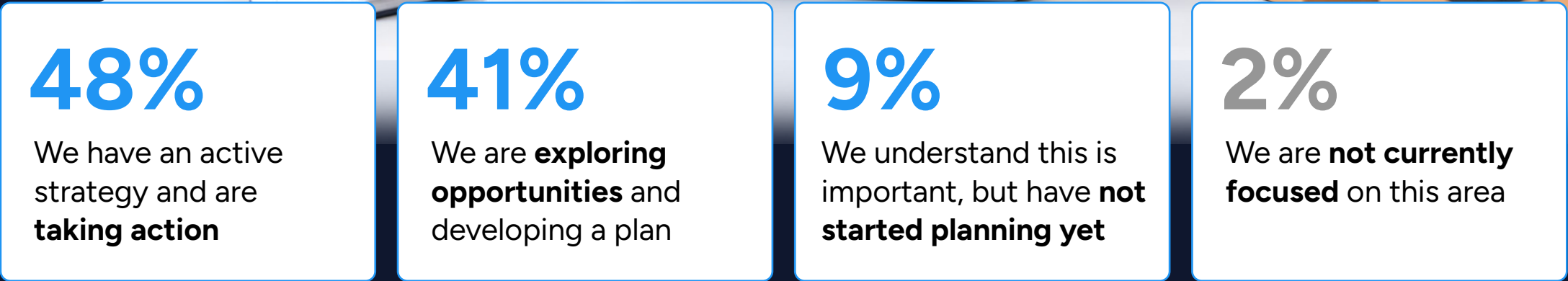


Q. Which of the following, if any, are your concerns about using AI in marketplace operations?

Are sellers ready for AI-driven commerce?

Almost all organizations (98%) recognize the importance of preparing product data and content for **AI-driven product discovery**.

However, awareness and action are very different things. Nearly half (48%) have an active strategy and are taking action, while 41% are exploring opportunities and developing a plan.



Q. As AI-powered shopping experiences become more common, which best describes how your organization is adapting product data and content for AI-driven product discovery?

Five markets, five marketplace realities



TOP PRIORITY

AI implementation 25%

Leading priority, closely followed by profitability

BIGGEST CHALLENGE

Manual work is holding back expansion

41% cite slower marketplace expansion as its biggest impact, highest of any market.

AI & KEY REGIONAL NOTE

- **32%** worry integration with current workflows is the main barrier to AI adoption.
- US sellers also spend 36% of their weekly time on manual operations, the highest globally.
- Walmart dominates alongside Amazon, creating a two-giant marketplace landscape unique to the US.



TOP PRIORITY

Profitability 37%

Highest of any market

BIGGEST CHALLENGE

Pricing pressure is the biggest challenge

30% struggle to stay competitive on pricing, while **46%** say manual work increases listing, pricing, or inventory errors.

AI & KEY REGIONAL NOTE

- **UK sellers are the most willing to commit to AI early**, with just 6% waiting for ROI/regulatory clarity before acting, the lowest of any market surveyed.
- Marketplace compliance challenges are the top barrier to expansion, cited by 29%.



TOP PRIORITY

AI implementation 34%

Highest focus on AI operations of any market

BIGGEST CHALLENGE

Manual work is driving up costs

48% cite higher operational costs as its biggest impact, while 25% struggle with marketplace policies and identifying growth channels.

AI & KEY REGIONAL NOTE

- **Compliance and regulatory risk is the top AI concern at 41%**, well above the 31% average.
- Otto, Zalando and Kaufland are key local marketplace players.



TOP PRIORITY

Enhancing product content/visibility 30%

BIGGEST CHALLENGE

Content management limits optimization

27% struggle to manage product content across marketplaces, while 36% say manual work leaves less time for performance optimization.

AI & KEY REGIONAL NOTE

- **Unclear ROI is the top AI concern at 30%.**
- France also has the most domestic-only sellers, with 52% selling only within France.
- Inventory and warehouse sync is the top tool used at 30%, higher than any other market.



TOP PRIORITY

Boosting profitability and reducing returns 23%

no single priority dominates

BIGGEST CHALLENGE

Content management is the key challenge

27% struggle to manage content across marketplaces. Manual work has a broad impact, with costs, errors, and missed sales each cited by **32%**.

AI & KEY REGIONAL NOTE

- **32%** cite transparency in AI-decision making as the standout concern.
- Dutch sellers also spend nearly a third of their working week on manual operations.
- Bol remains central to the Dutch ecommerce landscape.

Europe's marketplace complexity is structural

European sellers operate across a more fragmented marketplace landscape than their US counterparts, with **different platforms playing important roles in individual markets.**

Country-specific requirements, localization and marketplace policies add further hurdles, **strengthening the case for automation and centralized marketplace management as sellers scale.**



The US marketplace advantage, and its limits



US sellers operate in a more concentrated marketplace landscape than their European counterparts. Amazon and Walmart dominate, giving sellers access to a large share of American shoppers through a relatively small number of major channels.

But that concentration comes with trade-offs. **Competition is intense, putting pressure on margins and operational efficiency,** while reliance on major platforms increases sellers' exposure to marketplace requirements and changes.

That pressure is reshaping seller priorities. US sellers are increasingly focused on AI and profitability, but manual operations continue to hold back growth. The opportunity is clear: **Greater automation could help teams improve performance on existing channels while creating more capacity to grow.**

Turning marketplace complexity into marketplace performance

Marketplace success is no longer defined by how many channels you sell on. It's defined by how well you operate them - efficiently, profitably, and at scale. The findings in this report make that clear.

Whether you're expanding internationally, tightening operational performance, or positioning for AI-driven commerce,

ChannelEngine gives you the platform, the partner ecosystem, and the confidence to do it at scale.

Conquer complexity with ChannelEngine

Questions worth sitting with:

- Can you **efficiently manage product content, pricing, and inventory** across every marketplace you sell on?
- Are **manual processes** limiting your team's ability to optimize performance and profitability?
- Do you have the **visibility and control** needed to grow with confidence?
- Is your business ready for **AI-driven marketplace operations** and product discovery?
- Can your current technology **support** the next stage of marketplace growth?

Marketplace Seller Trends 2026:

What's changing and how sellers are responding

Join Valerie Dichtl and Jorrit Steinz on October 13, 2026, to find out what's really shifted and what it means for your 2027 strategy.

Register now →



Marketplace seller trends report 2026

About ChannelEngine

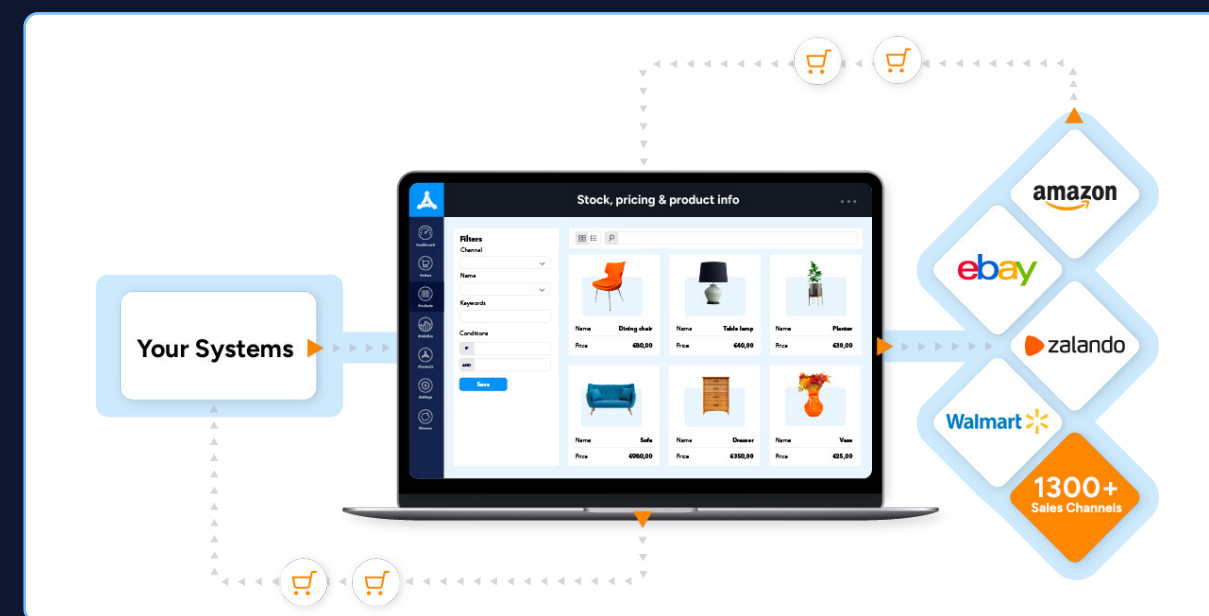
ChannelEngine connects brands and retailers to 1300+ marketplaces from a single platform, bringing product data, inventory, orders and pricing together through connected integrations and smart automation. Combined with a global partner ecosystem, it gives teams the infrastructure and control to scale marketplace operations without scaling complexity alongside them.

- Grow your marketplace footprint without growing headcount
- Automate manual processes with connected workflows and integrations
- Keep product, pricing, inventory, and orders synchronized across every channel
- Improve marketplace performance while protecting margins
- Stay in control as operations expand across markets and channels
- Sell through ChatGPT, Google Gemini, and the next generation of AI-powered channels without additional setup

ChannelEngine supports leading global brands including Unilever, Clarks, Philips and Samsung, with teams across Europe, North America, the Middle East and Asia.

About Sapio Research

Sapio Research is a full-service B2B and tech market research agency that helps businesses grow thanks to high quality, efficient, and honest research solutions. We are an enthusiastic and purpose-driven team of expert market researchers.



Also from ChannelEngine: The shopper's perspective

For sellers, the message is clear: Marketplace performance increasingly depends on demonstrating consistency and trust across every channel a shopper might encounter you on.

37% of consumers **start their online shopping journey on a marketplace**, well above search engines, brand websites, social media, and AI.

53% always or often **compare the same product across multiple platforms** before purchasing, visiting three on average.

58% of consumers have **used AI to research products**, but only 17% would complete a purchase directly through AI.

43% say **concerns about product quality damage trust**, while 31% point to product authenticity.



If you haven't read the [Marketplace Shopping Behavior Report 2026](#), it's worth a look alongside these findings.

This report covers how sellers are operating. Earlier this year, we looked at the same marketplace landscape from the other side - **how consumers actually shop, discover, and decide.**

Marketplace shopping journeys are becoming broader, more fragmented, and more considered. Marketplaces remain the leading starting point for product discovery. But **shoppers increasingly move between marketplaces, search engines, social platforms, and AI tools before committing.** They compare products and prices across several channels, look for clear and consistent information, and rely heavily on trust signals before purchasing.