

Industry study, 2026

Scaling ecommerce profitably

How winning organizations think differently

Does your leadership team expect you to
double online sales in the next 3-5 years?

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Our leadership team wants to double Amazon revenue by 2030. **We are terrified.**

Senior ecommerce leader, global CPG brand, 2026

Understanding the divide between leadership expectations and execution reality

Research areas

- 1

Leadership targets
- 2

Organisational enablement
- 3

Capabilities and tools
- 4

Success criteria

Who we spoke to

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Roles

Global and regional ecommerce, sales and retail media leads.
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Brands

Multinational CPG, consumer health, pet nutrition, spirits, small domestic appliances.
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Format

45-minute recorded interviews, anonymized.

Ecommerce leaders rate their organisational readiness as halfway effective

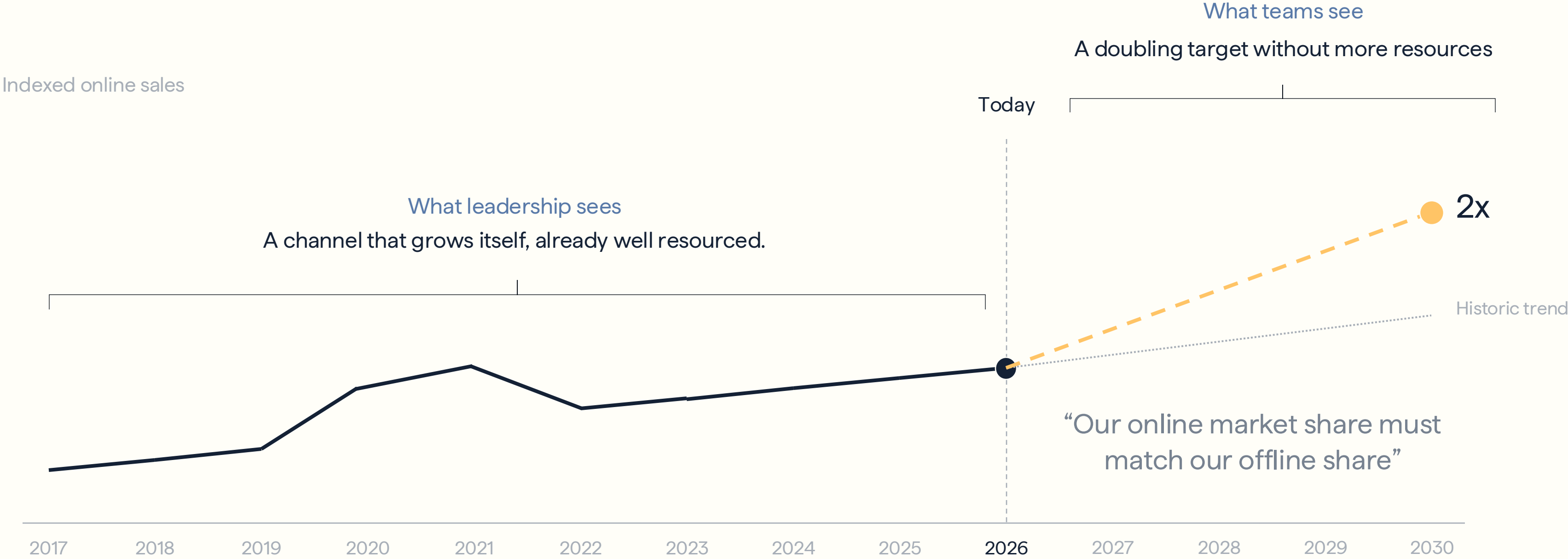
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Self-rated readiness for commerce today



Finding 1: Leadership treats online growth as organic, and resources it accordingly

Illustrative



Finding 2: Ecommerce readiness still requires continuous education to sustain online channel prioritization

Time educating leadership	Organisational friction (1 to 10)	Ecommerce Readiness (1 to 10)
10%	2	8
15%	1	5 to 6
20%	7	5
20 to 30%	5	6 to 7
40 to 60%	5	2 to 3
Over half	7 to 8	5 to 6
“Most of my time”	8	6

≈ 0.8 (High)

correlation between education time and organisational friction

≈ 0.3 (Low)

correlation between education time and ecommerce readiness

Finding 3: with no channel-specific value proposition, budget becomes the substitute

Bought growth

- Media and promotion
- Trade money that only hands over margin
- Deep-discount deals amplified with retail media
- With new entrants in the market, it funds price wars

Built growth

- Channel-built selection with its own economics
- Investment that buys category access
- Data as the new trade currency
- It compounds, and it survives the next negotiation

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It is not about getting more money. It is about how far your money goes.

Anonymised interview participant

Finding 4: AI is a multiplier in researched organisations. It is not yet an enabler.



Centralised AI initiatives

AI budgets sit at company or parent level. Not one ecommerce team we spoke to has its own.



Rented expertise

Teams lean on agencies, SaaS and partners for automation.



Framed as a cost saver

Leadership removes roles. Practitioners use AI to compress reporting.



AI cannot fix a capability gap where the capability is not there.

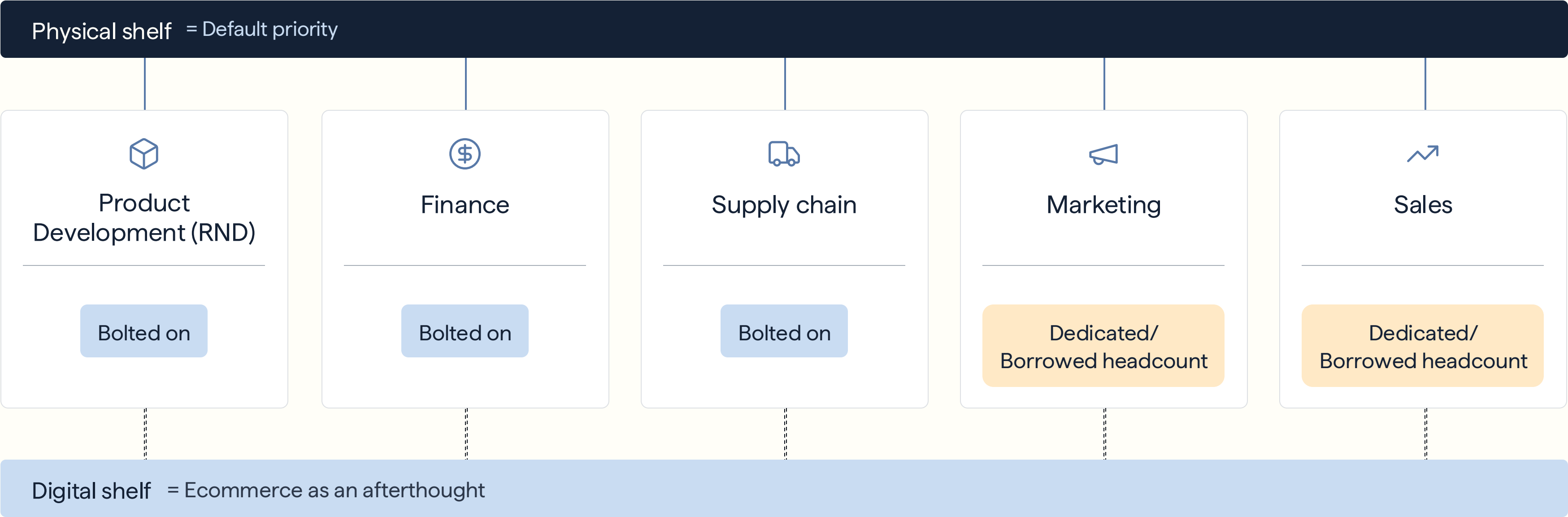
Anonymised interview participant



AI will be won or lost on data structure.

Anonymised interview participant

Finding 5: omnichannel is discussed everywhere but mainly executed in the marketing function



The result: process misalignment across functions, and lower operational excellence online.

Targets are defined as outputs by leadership teams.
But their inputs are never defined.

... aka tools, processes, people (+ budgets)

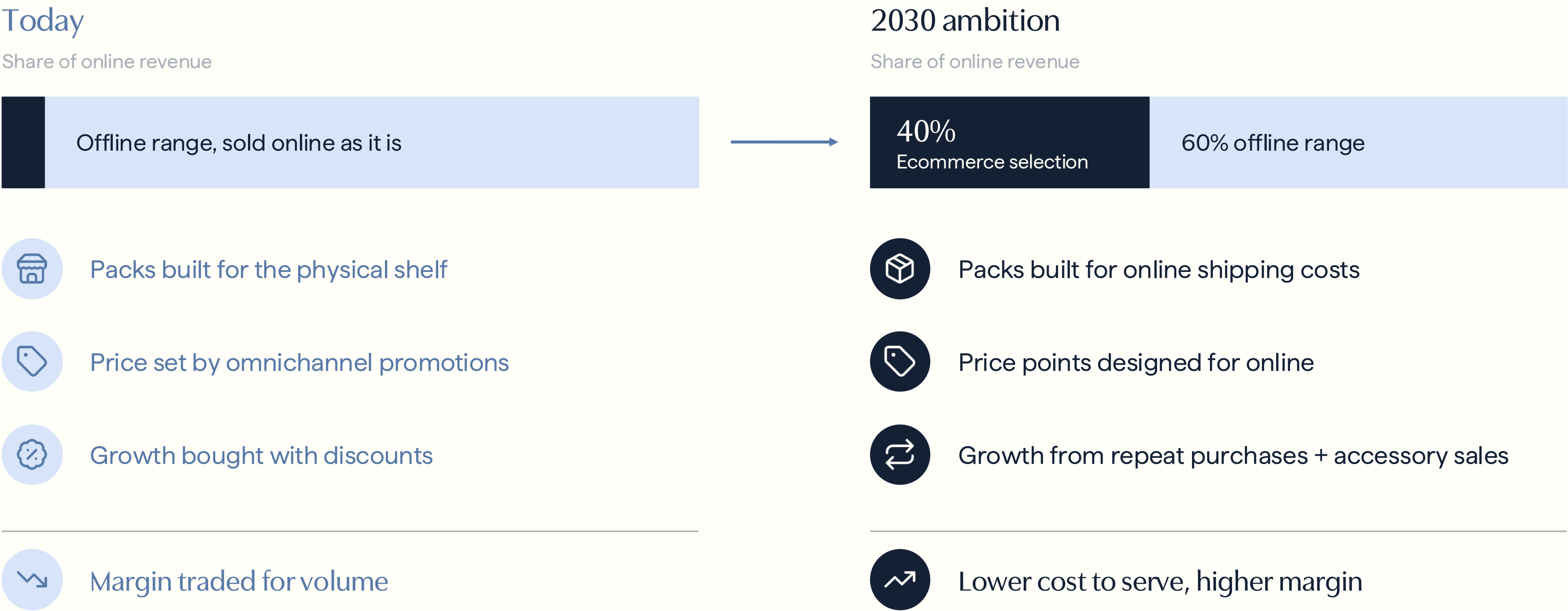
Ecommerce must become the default in every function, not a bolted-on initiative



Consulterce view, informed by the interviews.

Scaling growth in ecommerce requires a rethink of portfolio architecture

Illustrative



What another year of doing the same costs

 **50%+**

of available growth sits in ecommerce over the next few years.

 **Margin stability vs growth**

One business paused growth to install organisational sponsorship first and safeguard margins.

 **35% avg. education time**

of senior ecommerce time spent educating leadership instead of facing the customer.

 **Moving goalposts**

Growth one quarter, profitability the next. Ecommerce needs long-term, integrated planning.

Three moves that require no additional headcount

1 | Define your inputs

- Name one owner for the channel
- Agree the input measures that lead the growth number
- Conduct a bottoms-up finance approach (name the cost of growth)

2 | Sponsorship from the top

- A leader who has run digital commerce
- A strategy that considers the realities of trading online
- Reviews report progress, they don't reopen internal debates

3 | Mirror the customer

- Own the commercial position where the retailer runs its business
- Pan-European for a customer like Amazon
- Local activation and assortment within agreed guardrails

Online growth is built, **not organic**.

Requiring an integrated omnichannel approach across functions, leadership sponsorship, and an operating model built for the margin realities of ecommerce.