

The State of eCommerce:

# Replatforming and Migration Trends for 2025



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# Introduction

In today's AI-driven digital marketplace, the eCommerce platform that powered a business's past growth could now be its biggest liability. As competition intensifies, visionary companies recognize that taking advantage of AI-powered solutions is no longer optional. Most enterprises, however, are running on rigid, inflexible systems that are already struggling to integrate these innovations effectively. Businesses have reached a critical decision point, and the choice they make next will determine their competitive outcome.

This new frontier of AI commerce is not a distant concept; it is actively reshaping brand loyalty and customer dynamics. It is an ecosystem where **agentic commerce** — AI that automates decision-making — is the new standard. This emerging model points to a future where AI agents anticipate customer needs and can autonomously act on behalf of a shopper. This is precisely what legacy platforms struggle to support.

Businesses are now at a fork in the road. One path is to remain on a monolithic platform, blocked from the tools that are defining the next era of commerce. The other is to adopt a **composable architecture**, a modular foundation built for agility. This approach provides the flexibility to plug in AI capabilities and agentic systems as they evolve, ensuring businesses can innovate rapidly without a complete replatforming effort every time technology advances.

This report provides in-depth insights into the replatforming strategies of leading enterprises across the manufacturing, healthcare, telecommunications, retail, consumer packaged goods and wholesale sectors. It highlights today's most pressing eCommerce challenges and reveals the tangible benefits of transitioning to a future-ready platform, including improved scalability, increased revenue and enhanced customer experiences.

The window of opportunity is narrow. Just as mobile and social platforms reshaped eCommerce before, AI is reshaping it now. When commercetools introduced the first headless commerce platform in 2010, and then pioneered composable architecture a few years later, the company anticipated the need for flexibility in a rapidly shifting digital landscape. That same foresight applies today. The companies that migrate to a composable foundation now will be the ones prepared to capture tomorrow's growth and lead the next era of commerce.



# Executive summary

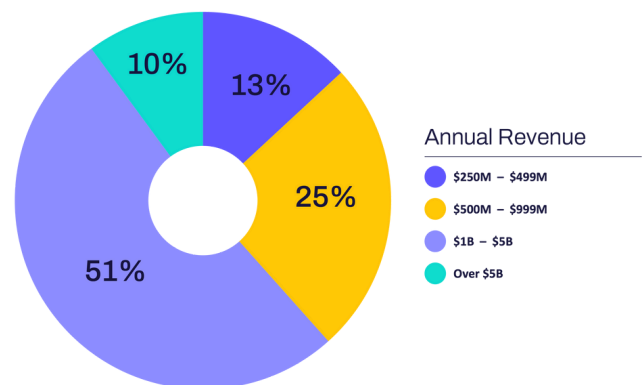
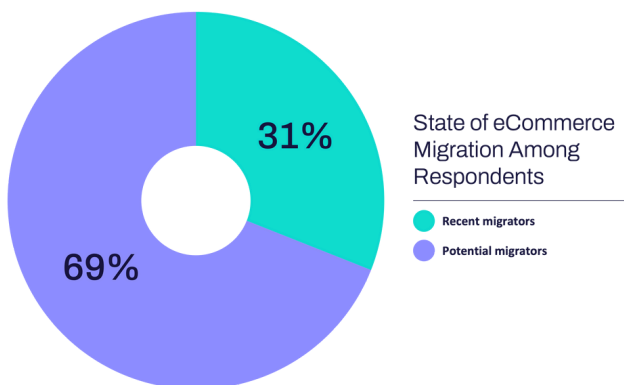
As agentic AI reshapes the future of digital business, enterprises face a critical challenge: Legacy platforms are not built for the speed and complexity of AI-driven experiences. Organizations face a narrow window to build AI-ready infrastructure. 88% of potential migrators need to switch within 12 months, yet many are held back by concerns that recent migrators have proven to be unfounded.

The research reveals a striking pattern: Organizations that have already migrated are nearly 7x more likely to be 'very satisfied' than those still evaluating options. Yet 57% of potential migrators cite data security concerns as a barrier — despite 96% of recent migrators reporting that their data was secure during migration. This gap between perception and reality is costing organizations both time and competitive positioning.

The State of eCommerce report captures the pulse on replatforming and migration trends among B2B manufacturing, healthcare, telecommunications, retail, consumer packaged goods and wholesale enterprises based in the US and UK. The respondents represented in this report were business and technology leaders involved in eCommerce platform purchasing decisions at enterprises that generated at least \$250 million (USD) in total annual revenue, with at least 10% of that revenue coming directly from eCommerce sales.

Respondents were split between two segments:

1. **Recent migrators** who had switched to a new eCommerce platform within the past 12 months.
2. **Potential migrators** who were considering switching to a new eCommerce platform within the next 12 months.



## Key findings

- **97%** of eCommerce platform decision-makers agree that AI will be important in shaping the future of eCommerce.
- **93%** of respondents anticipate a future where AI agents will predict customer needs and suggest products before customers realize they want them.
- **87%** of eCommerce platform decision-makers have a favorable perception of composable commerce. Moreover, its prominence is likely to increase over time, as **94%** of respondents report that composable commerce will be more relevant for their company's business model in the near future.
- **88%** of potential migrators **need to switch within the next 12 months**.
- Organizations that recently switched are nearly **7x more likely** to be "very satisfied" compared to those considering a switch.
- **96%** of recent migrators say that data was secure during migration.
- **96%** of recent migrators said the new platform had a faster time to value than expected.
- The platforms recent migrators most commonly moved away from were: **Shopify (39%), SAP Commerce Cloud (35%), Salesforce Commerce Cloud (30%)** and an **in-house built platform (30%)**.



97%

of decision-makers agree that AI will be crucial in shaping the future of eCommerce.

# The State of eCommerce in 2025

eCommerce leaders face a paradox: Their platforms have never been more critical to revenue, yet most are fundamentally unprepared for the AI revolution that's already reshaping customer expectations. The stakes could not be higher. Among the enterprises surveyed, eCommerce is the leading channel for revenue generation, accounting for:

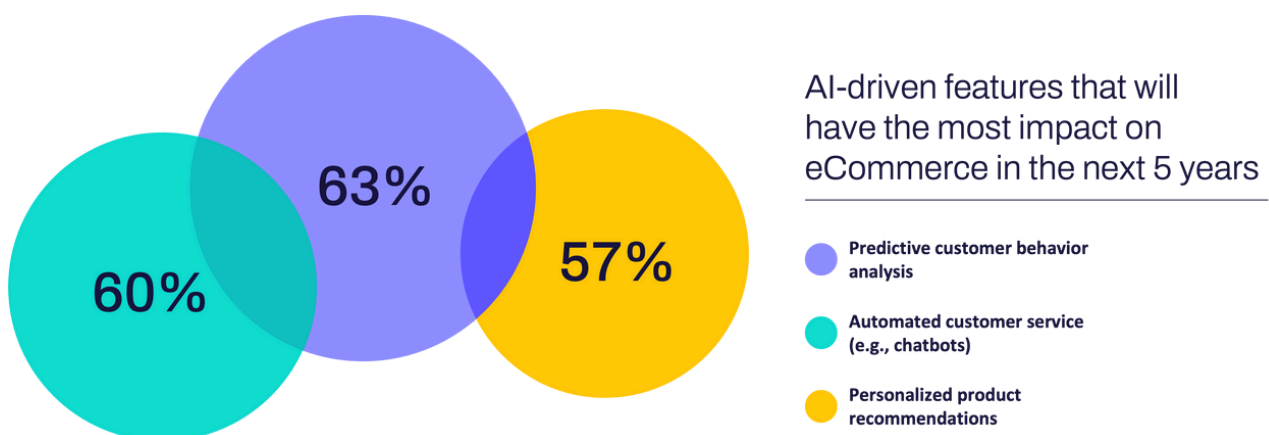
- 35% of annual revenue on average.
- Leaders expect that share to climb to 44% within the next three years.
- For a significant portion of the market, the future is already here, with 21% of enterprises generating at least half of their total revenue from eCommerce today.

These figures underscore a dangerous disconnect. As businesses become more reliant on their digital channels, the legacy technology underpinning them is becoming a significant barrier to the innovation needed to survive and grow. This reality forces leaders to turn to the next frontier of innovation with AI-driven customer experiences, leveraging AI to deliver the faster, smarter and more personalized interactions that will set them apart.

## How AI is reshaping eCommerce

Nearly all (97%) decision-makers agree that AI will be crucial in shaping the future of eCommerce. When asked what AI-driven features will have the most impact on eCommerce in the next five years, 63% of respondents indicated that predictive customer behavior analysis will be the most transformative feature. The second and third most commonly selected features are automated customer service tools, such as chatbots (60%) and personalized product recommendations (57%).

These top three capabilities all work toward the same goal of creating frictionless, relevant and efficient customer journeys that improve satisfaction while driving measurable business growth.



## AI-driven features that will have the most impact on eCommerce in the next five years

Predictive customer behavior analysis	63%
Automated customer service (e.g., chatbots)	60%
Personalized product recommendations	57%
Inventory and supply chain optimization	47%
Dynamic pricing strategies	35%
Agent-led buying	17%

While leaders are focused on these immediate AI applications, a more profound shift is on the horizon. The data reveals a fascinating disconnect between the perceived short-term impact of agent-led buying and its recognized long-term inevitability.

## Beyond the hype: Building the foundation for agentic commerce

While only 17% of leaders expect agent-led buying to dominate in the next five years, the overwhelming majority (93%) recognize that AI agents will fundamentally change how customers shop. This isn't a contradiction. It reflects the reality that agentic commerce will arrive in phases, not as a single disruptive moment.

## Anticipated impact of AI agents on eCommerce

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Net: Agree
AI agents will predict customer needs and suggest products before customers realize they want them	0%	1%	6%	60%	33%	93%
Customers will delegate routine purchases to AI agents that learn their preferences and buying patterns	1%	3%	9%	57%	29%	86%
Customer brand loyalty will be a less significant factor in purchases as AI agents shop on customers' behalf	3%	20%	27%	35%	15%	49%

The early stages will focus on AI-assisted experiences: Predictive recommendations, conversational search and intelligent product discovery that augment human decision-making. Only later will autonomous agents fully handle end-to-end transactions on behalf of customers.



For enterprise leaders, this means the window to build the right foundation is **now**.

Organizations that treat AI as a future-state problem rather than a current infrastructure challenge will find themselves scrambling to retrofit systems that weren't designed for AI integration. To avoid this fate, leaders must understand the core capabilities that define an AI-ready commerce foundation.

Whether organizations are preparing for near-term AI applications or positioning for fully autonomous agents, the platform requirements remain consistent. Three foundational capabilities separate systems that can evolve with AI innovation from those that will require another costly migration cycle.

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# What AI-ready commerce actually requires

To capitalize on AI opportunities — from conversational assistants to autonomous agents — enterprises need three foundational capabilities:

## Unified commerce data access

AI systems can only be as intelligent as the data they have access to. Legacy platforms often trap commerce data in silos — product catalogs, inventory, customer history and order data live in disconnected systems. AI agents need real-time access to a comprehensive commerce context to deliver relevant, personalized experiences.

## Composability and standards-based interoperability

As AI capabilities evolve rapidly, enterprises need platforms that can integrate with emerging AI ecosystems and protocols without vendor lock-in. The ability to adopt new AI models, agents and services as they mature — while maintaining security and governance — requires an architecture built for composability and standards-based integration.

## Persistent, contextual customer experiences

Generic chatbots and session-based AI interactions aren't enough. The future belongs to branded AI companions that maintain context across channels, remember customer preferences, and deliver continuity whether a shopper moves from mobile to web to messaging platforms. This requires AI that are easily integrated into commerce operations, not bolted on as an afterthought.

Organizations evaluating new commerce platforms should assess whether their architecture enables these capabilities — or whether they'll be back in migration mode within two years as agentic commerce matures.

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# Drivers for innovation: Why future-readiness is an infrastructure decision

Even if fully autonomous agentic commerce is still in its early stages, enterprises cannot afford to wait to prepare. The ability to integrate AI is an immediate infrastructure challenge, and the choice of platform architecture creates a fundamental divide between those who can innovate and those who will be left behind.

This creates a fork in the road: A closed ecosystem or an open one. With monolithic, all-in-one platforms, businesses are locked into their vendor's development roadmap. They must wait for the vendor to prioritize, build and release AI features, giving up control over their own timeline. For merchants on these platforms, industry innovations remain press releases rather than actionable tools.

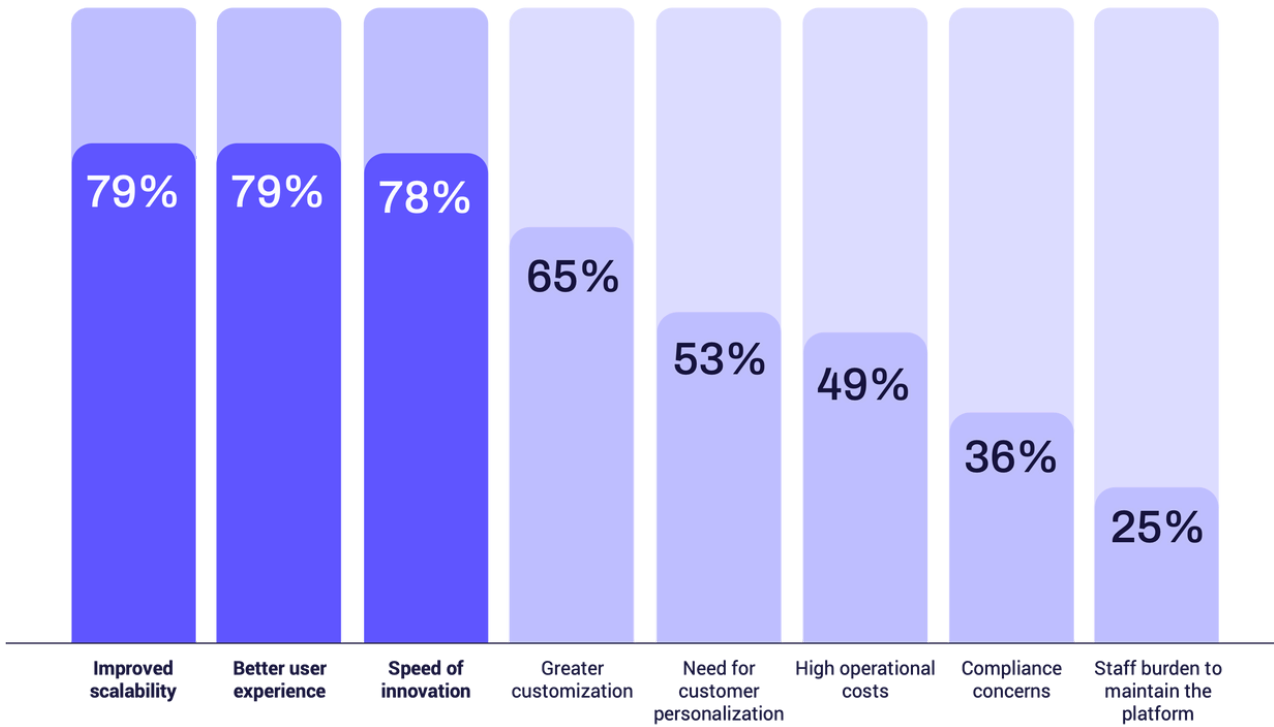
An open, composable architecture offers a profoundly different path. Built on modularity, it allows businesses to select and integrate best-of-breed components as they emerge, rather than relying on a single vendor. This approach provides the flexibility to plug in new AI tools, APIs and agentic systems without having to replatform the entire commerce stack. It allows an enterprise to innovate at its own pace, not its vendor's.

## Business and technology leaders increasingly recognize this distinction:

- 87% of eCommerce decision-makers already have a favorable perception of composable commerce.
- 94% report it will be even more relevant to their business model in the near future.
- This growing awareness is directly reflected in what leaders prioritize when evaluating a new platform. The ability to control the “speed of innovation” is a top-three consideration for switching, cited by 78% of leaders, alongside improved scalability and a better user experience (both at 79%).

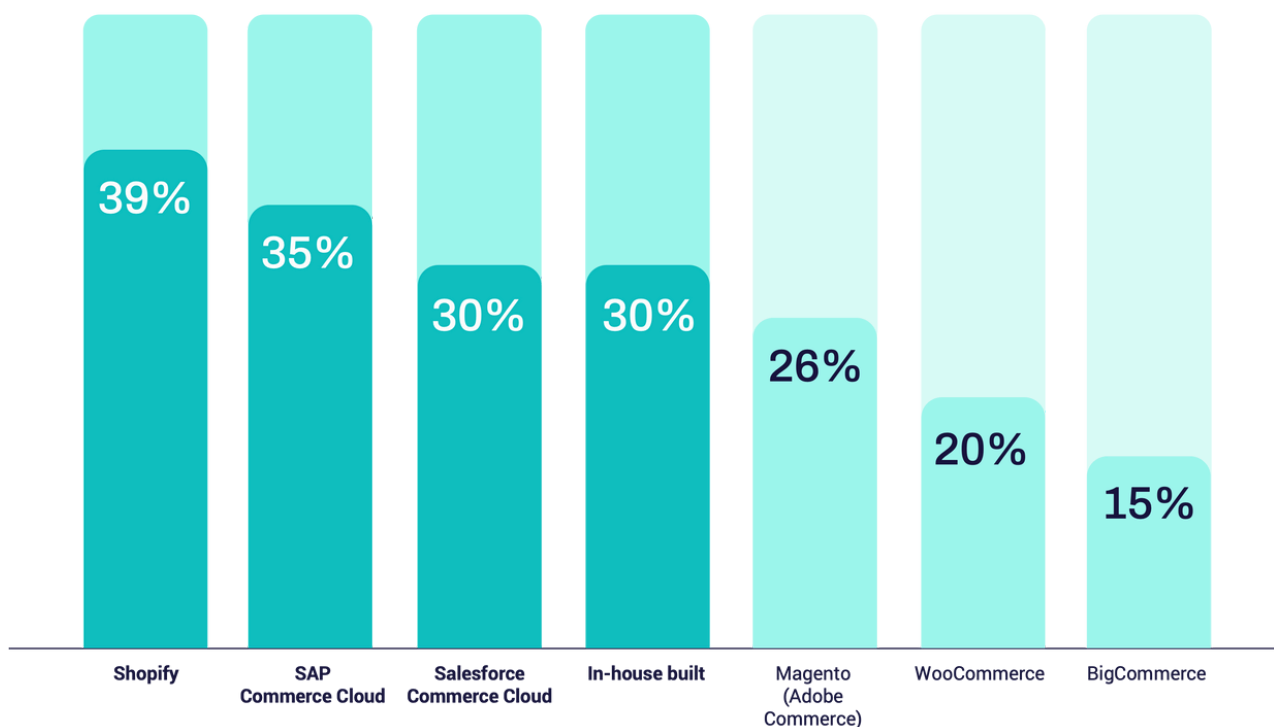
A composable foundation is the key to unlocking all three, giving enterprises the control and flexibility needed to compete in the age of AI.

## Considerations for switching eCommerce platforms



With those considerations in mind, recent migrators moved away from certain platforms to achieve their eCommerce goals. The platforms recent migrators most commonly moved away from were: Shopify (39%), SAP Commerce Cloud (35%), Salesforce Commerce Cloud (30%) and an in-house built platform (30%).

## Most common eCommerce platforms switched away from

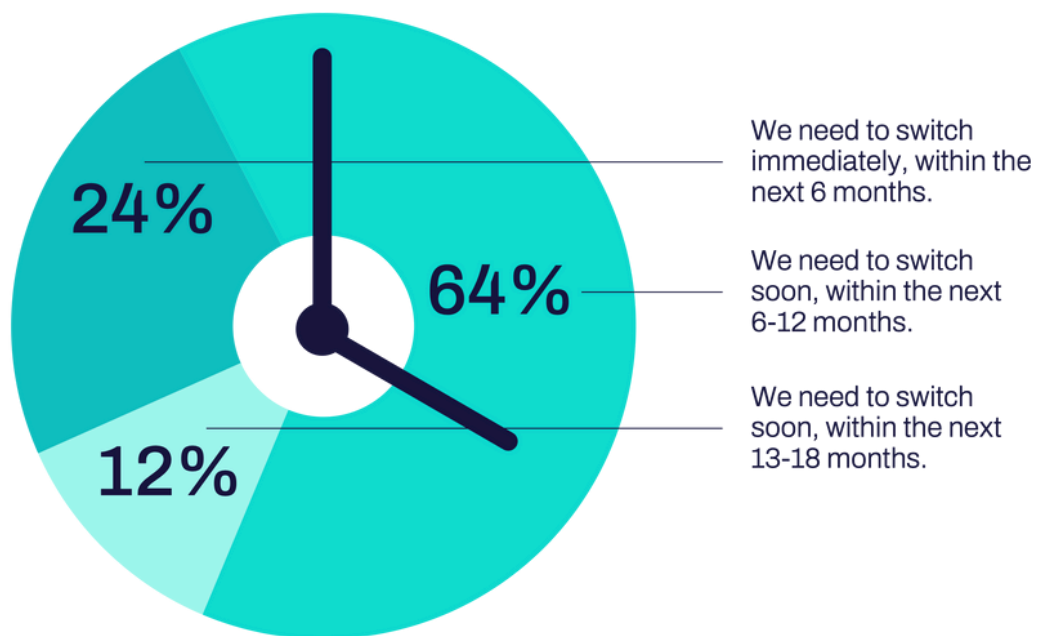


These priorities are not just theoretical; they are the primary factors compelling businesses to re-evaluate their current systems, leading many to move away from monolithic and in-house built platforms. With the case for migration so compelling, the question becomes: What holds potential migrators back?

## Why some organizations lag behind

Among potential migrators, 88% report that they need to switch platforms within the next year. Nearly one in four (24%) need to switch immediately, within the next six months.

### Urgency and timing of switching eCommerce platforms



Potential migrators feel the competitive pressure to move to a modern eCommerce platform that enables greater innovation, scalability and long-term growth. They recognize that clinging to legacy systems could limit their ability to keep pace with evolving customer expectations and fast-moving competitors.

Despite the urgency, many struggle to overcome buying hurdles within their organization. More than half (57%) of potential migrators cite data security and integrity concerns as a reason preventing them from switching to a new eCommerce platform.

Yet, among companies that did migrate within the past year, 96% report that their data was secure during migration. When asked how they mitigate migration challenges and risks, recent migrators described various strategies for enhancing security protocols via process updates, monitoring tools and staff training. Some also turn to outside experts:

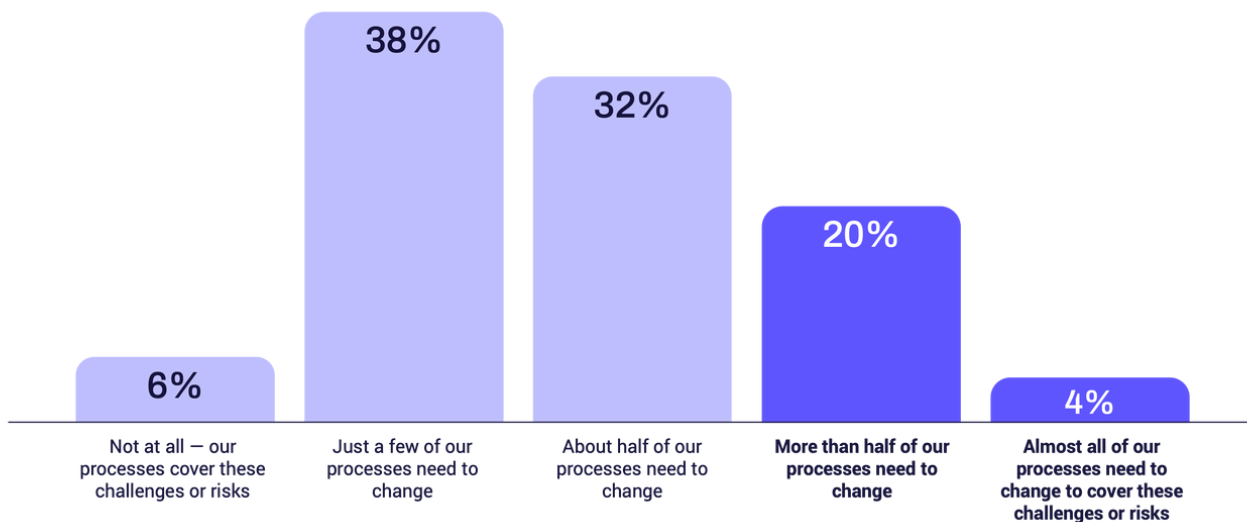
“For data security, partner with a top-notch cybersecurity firm for audits and encryption. To address expertise gaps, hire external consultants and train internal teams.”

- CFO, Healthcare

Organizations may vary in their risk mitigation strategies. But almost all (94%) of them acknowledge that their processes must change to address migration challenges and risks. This recognition underscores the reality that migration is not a purely technical shift. It also requires operational adaptation, new workflows and cross-team coordination.

For some enterprises, the scale of this change is more vast. Nearly a quarter (24%) of respondents anticipate needing to modify more than half of their existing processes, signaling a fundamental rethinking of how their business supports scalability, innovation and customer experience in a new platform environment.

### Scale of process changes to address migration challenges or risks



While these operational and security concerns are valid, the experiences of those who have recently completed a migration prove that the rewards far outweigh the risks.

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# Recent migrators are unlocking more value from their eCommerce platform

Even with the process changes required, the benefits of migrating seem to outweigh the challenges. Recent migrators are nearly **7x more likely** to be “very satisfied” with their eCommerce platform than those considering a switch. Recent migrators even express regret over not switching their platform sooner.

“I have always known it to be a game changer for the commercial market, but what I wish I knew earlier was actually implementing it sooner.”

- **IT Director**, B2B Manufacturing

“I wish our company started sooner to drive more revenue and growth earlier than waiting.”

- **Director of Marketing**, Retail Food & Beverage

“Scalability is embedded in eCommerce platform migration. Knowing this sooner would have accelerated growth.”

- **Director IT Cybersecurity**, B2B Manufacturing

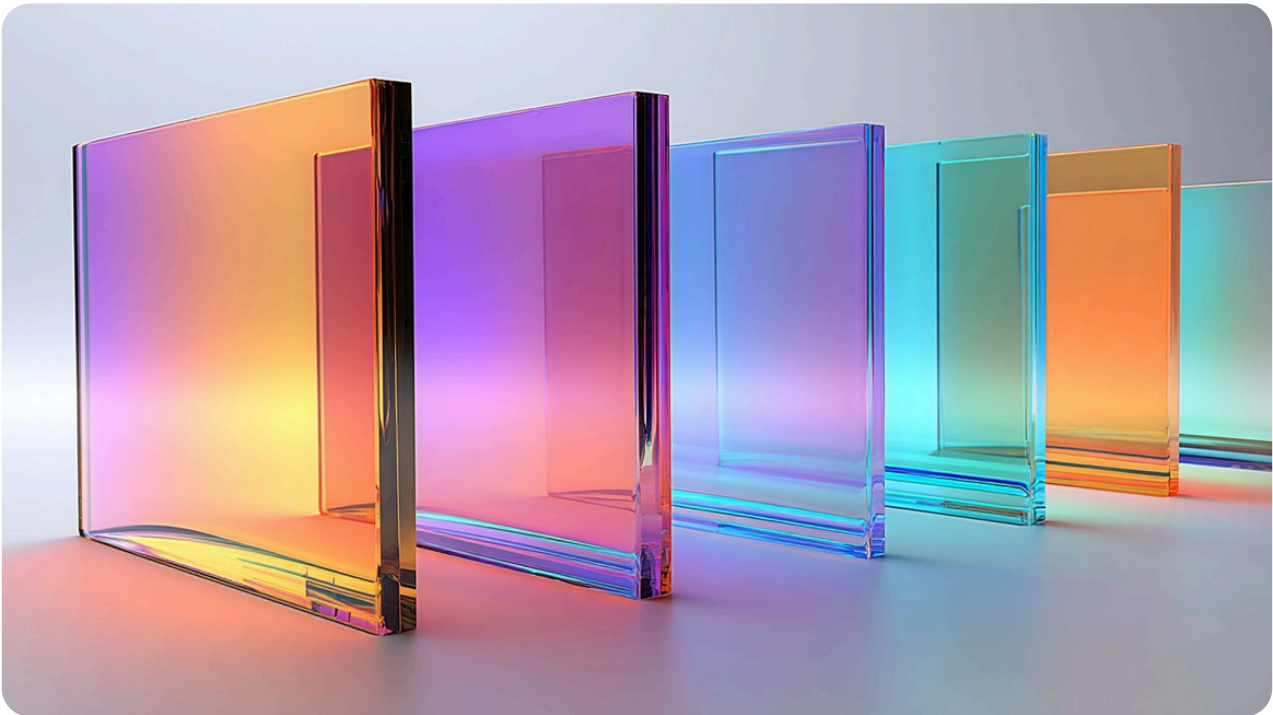
Recent migrators experienced a wide range of measurable benefits after switching to a new eCommerce platform, reinforcing the payoff of making the leap. Nearly all of them reported that the transition exceeded expectations:

- 96% said the new platform delivered faster time to value than anticipated.
- 96% found the new platform easier to use for their organization.

### The gains extended directly to performance and growth:

- 67% accelerated website speed.
- 65% improved scalability.
- 63% increased revenue, while 57% enhanced their customer experience post-migration.

Together, these results highlight that while migration requires substantial effort and planning, the tangible business impact is both broad and compelling. However, this does not happen by accident. A successful migration hinges on strategic planning and buy-in from the highest levels of the organization.

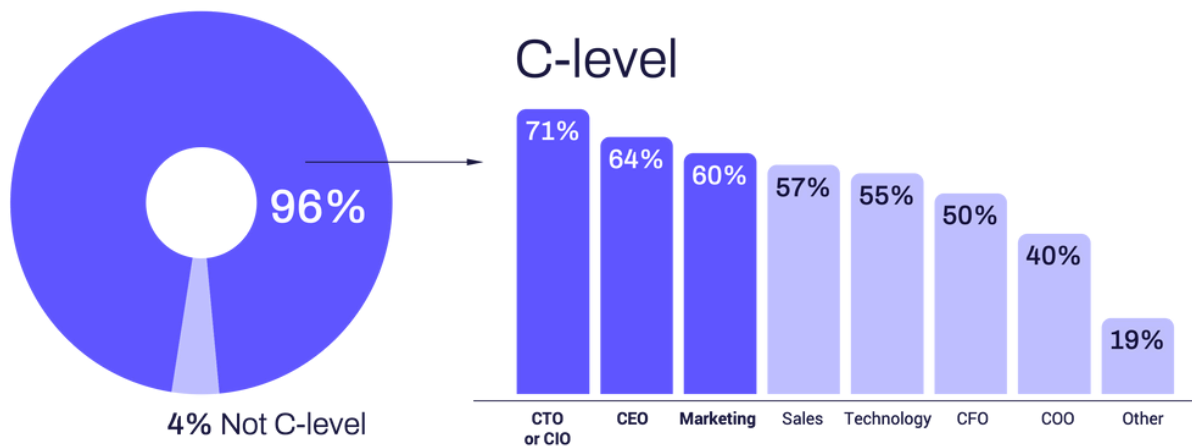


# Top-down alignment is the key to migration success

The first step in ensuring a successful eCommerce migration is to align leaders across departments early in the decision-making process. Nearly all (96%) companies report having a C-level executive as a key stakeholder in their eCommerce platform decisions.

Among the C-suite, CTOs or CIOs were most commonly identified as playing a crucial role in these decisions at 71%, surpassing CEOs (64%), Marketing (60%), CFOs (50%), COOs (40%), and other senior executives (19%).

Key stakeholders of eCommerce platforms



Technical leadership involvement in eCommerce platform decisions is critical. But engaging other leaders across departments early on can also put companies in a better position to anticipate challenges, set the right priorities, and avoid costly missteps and disruptions.

For example, other research has shown that excluding CFOs in the early phases of the buying process can lead to costly re-evaluations and impede procurement. A Vice President of Sales and Wholesale captures why early stakeholder alignment across leadership is critical:

“I wish I had known how crucial it is to involve all stakeholders early in the migration process to ensure clear communication and alignment, as well as the importance of selecting a scalable platform that can support future growth without causing disruptions.”

- **Vice President of Sales and Wholesale**, Wholesale Organization

Beyond leadership alignment, companies also need to allocate sufficient time and anticipate the complexity of the migration process. Change management is often underestimated. But migrating to a new platform is just as much a cultural shift as it is a technical one. A Vice President of Information Technology from a B2B manufacturing company shares this lesson learned from their recent migration experience:

“One thing I didn’t fully anticipate was how important change management is for the wider team. Getting people trained, adjusting workflows and communicating updates early makes a huge difference. If I had planned for that sooner, the transition would have been much smoother and less disruptive.”

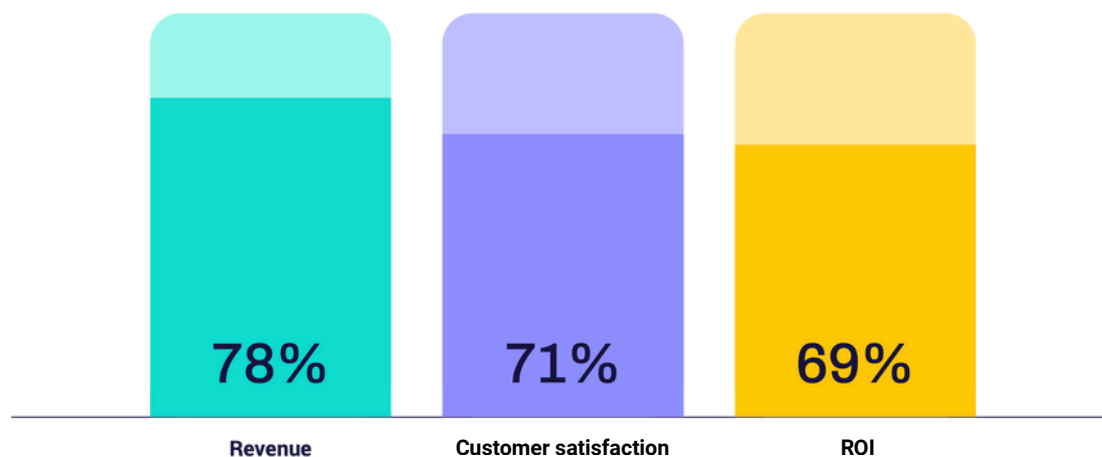
- Vice President of Information Technology, B2B Manufacturing

Beyond managing the human element of change, a successful project requires a clear, data-driven framework for what success looks like.

## Defining the metrics of success

Ultimately, success must be clearly defined and measured across departments, with established processes in place to track adoption and its impact. The top three metrics enterprises use are revenue growth (78%), customer satisfaction scores (71%) and ROI (69%).

### Metrics for evaluating eCommerce platforms



## Metrics for evaluating eCommerce platforms

Revenue growth	78%
Customer satisfaction scores	71%
Return on investment	69%
Customer retention rates	59%
Responsiveness	50%
Total cost of ownership (TCO)	49%
Speed	48%
Risk reduction	39%
Conversion rates	39%
Total time to value (TTV)	38%
Platform uptime	37%
Average order value	31%
Ability to compete	31%
Latency	23%

Just under half (49%) of respondents cited TCO as a core metric for evaluating their eCommerce platform, despite the fact that hidden costs and budget overruns were often cited as migration challenges and concerns.

“We’re tackling budget overruns by setting up a clear financial roadmap from day one, tracking every expense closely and keeping a buffer for unexpected costs.”

**- Vice President of Enterprise Architecture, Retail Fashion & Apparel**

While metrics like TCO and ROI are crucial for evaluating any platform, another important consideration in today’s market transcends traditional spreadsheets. It is about positioning the business for the next decade of innovation.

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# The platform decision is an AI decision

Every eCommerce platform decision made in 2025 is fundamentally a bet on AI readiness. The question isn't whether AI will reshape commerce — 97% of leaders already agree it will. The question is whether your platform architecture can evolve with AI innovation or whether you'll face another costly migration in two years.

Organizations that migrate to composable, API-first platforms today aren't just solving current pain points around scalability and user experience. They're building the foundation to:

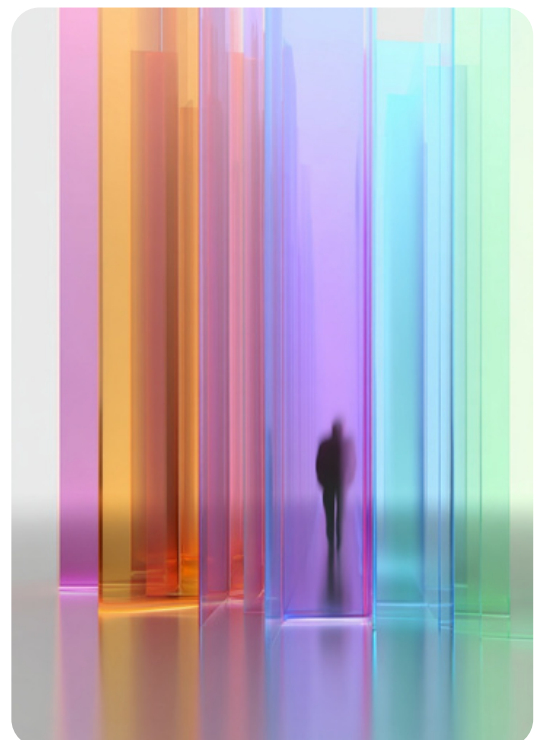
- Deploy conversational commerce experiences that maintain context across channels.
- Integrate autonomous shopping agents as consumer adoption grows.
- Adopt emerging AI protocols and standards without vendor lock-in.
- Experiment with multiple AI approaches to determine what drives the best results.

The migration window is narrow. Companies that move now will spend the next 3-5 years optimizing AI-driven experiences and capturing market share. Those who delay will spend that time scrambling to catch up while competitors pull ahead.

The infrastructure choices you make today will determine whether AI is your competitive advantage — or your Achilles heel.

Organizations need an eCommerce platform partner who can help them align on goals and measure success within a composable framework.

While the migration to a modular, API-first architecture is a significant undertaking, the investment unlocks the control and flexibility needed to compete in the age of AI. It's the definitive step an enterprise can take to break free from vendor lock-in, innovate at its own pace, and build the future-ready foundation required for the modern enterprise.



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# Glossary of terms

## **Agentic commerce**

Agentic commerce is an emerging model where autonomous AI agents act on behalf of shoppers or businesses to facilitate the buying journey, from product discovery and comparison to checkout and post-purchase support. Agentic commerce has the potential to fundamentally reshape customer expectations, reduce friction in purchasing and shift competitive advantage toward companies that build the infrastructure, trust and ecosystems needed to support AI-driven transactions.

## **Composable commerce**

Composable commerce is a modular approach to building and managing commerce platforms, enabling businesses to create tailored solutions that meet their specific needs. It involves selecting and integrating technologies from multiple vendors, rather than relying on a single vendor's one-size-fits-all solution.

## **Customer experience**

Customer experience (CX) refers to how customers perceive and feel about their interactions with a company, brand or product throughout their entire journey. This includes every touchpoint, from discovering and researching to buying, receiving, using and getting support post-purchase. It encompasses various aspects of the customer experience, including easy access to support, multiple payment and delivery options, personalized shopping, targeted marketing and transparent return policies.

## **Platform**

In terms of commerce technology, a platform is a comprehensive, integrated system that provides the necessary infrastructure, tools and services for businesses to create, manage and optimize their commerce experiences. It serves as the foundation upon which online stores, marketplaces and other commerce-related applications are built and operated, enabling businesses to sell products and services across various digital channels.

## **Personalization**

Personalization in retail today means tailoring products, services and interactions to fit each customer's unique preferences, behaviors and needs. It uses data and technology to make shopping more relevant and engaging, boosting satisfaction, loyalty and sales. Key tactics include recommending products based on individual tastes, past purchases and browsing habits, ensuring a seamless and personalized experience across all channels, and customizing a retailer's website or app to the customer's profile and previous interactions.

## Scalable/Scalability

Scalable refers to the ability of a system, platform or application to handle increasing amounts of workload, traffic or data without compromising performance, reliability or user experience. Scalability is a crucial characteristic for commerce technologies, as it ensures that the system can grow and adapt to the changing needs of the business, particularly as the volume of transactions, users and data increases.

## TCO

Total cost of ownership (TCO) represents the cumulative cost of an investment in technology, such as a commerce platform. It includes not only the initial purchase price or licensing fees but also the expenses associated with deploying, using and maintaining the software system throughout its entire lifecycle. The other half of the equation is the return on investment (ROI), which measures the gains or returns you achieve from that investment.

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# Methodology and About Cascade Insights

In collaboration with Cascade Insights, commercetools surveyed 150 business and technology leaders involved in eCommerce platform purchasing decisions at B2B manufacturing, healthcare, telecommunications, retail, consumer packaged goods and wholesale enterprises.

With more than 18 years of experience in the B2B technology sector, Cascade Insights empowers companies to seize opportunities with market research and marketing services. Our analysts and marketers work together to help our clients Act with Clarity™ in an industry defined by change and the pursuit of innovation. Learn more about Cascade Insights [here](#).



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# About commercetools

For global enterprises, commercetools provides the leading AI-first commerce platform that unifies commerce across any touchpoint, delivering unmatched revenue growth and performance. Our composable, cloud-native technology is the foundation for future innovation — from agentic commerce to conversational experiences — giving businesses the flexibility to design tailored, scalable commerce across any channel, at any scale.

By removing the constraints of legacy systems, commercetools enables companies to innovate freely, personalize at scale, and launch new channels quickly to meet the evolving demands of their customers.

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