nShift

Report

The new RETAIL REALITY

Trust, proof, and the delivery experience in the AI era

CONTENTS

INTRO

Every year brings a fresh set of retail technology trends. 2026 is different for one simple reason: the most important force showing up everywhere is a *customer who has stopped being patient.*

What's changing isn't just the speed of retail; it's the shape of customer demand. Customers want control, visibility, and fewer compromises at every step of the journey. Delivery choices that fit real life. Updates that feel proactive, not apologetic. A returns journey that doesn't punish them for buying online. When those expectations aren't met, the impact lands on your brand.

Behind that experience sits a carrier landscape that is getting more dynamic, with more out-of-home networks, more handovers, and more delivery choices that need to work consistently across partners.

At nShift, we operate in the moments where that impact is created: between checkout and doorstep, between service promise and operational reality, between retailer ambition and the limits of today's logistics landscape. It's a vantage point that makes patterns hard to ignore.

This report starts with the new retail reality, the shifts in behavior and demand that are redefining what "good" looks like. Then it goes deeper into what matters next: the capabilities required to deliver at scale, the constraints shaping 2026, and the priorities that turn better delivery into competitive advantage.

SECTION ONE

2026 RETAIL TRENDS:

The evolution of retail and customer demand

In 2026, the definition of convenience is shifting from "easy to browse" to "delegated and automated". For two decades, online retail relied on customers actively searching, filtering, and clicking. Now, more of the journey is being mediated by assistants, marketplaces, and hybrid fulfilment models.

The following market shifts describe how customer demand is changing and why delivery, tracking, and returns are becoming part of how commerce is won or lost.

Zero-click shopping: AI agents and agentic payments

Shopping is starting to be delegated. And when a machine is the first reader, the offer has to be comparable. Total cost, delivery promise, and returns terms need to be clear enough to be checked and executed automatically, not just explained.

Where we are now

AI shopping agents are moving from **novelty to infrastructure**. The shift is already visible in discovery behavior. In Capgemini's 2025 consumer research[1], 58% of consumers said they have replaced traditional search engines with generative AI tools for recommendations, which means discovery is increasingly happening inside assistants.

Trust remains a constraint on full automation. Forrester's 2025 UK research[2] points to a gap between expectation and readiness. 35% of UK online adults expect brands to market directly to AI agents in the future, while 24% currently trust AI agents to make routine purchases on their behalf.

An early adopter segment is already active. Retailer-commissioned research indicates that 28% of UK adults are comfortable allowing an AI assistant to auto-buy approved items.

Where we're heading

McKinsey's 2024 view of agentic commerce[3] describes three emerging paths:

- In one, an agent navigates to a brand website in place of a shopper.
- In another, agents transact directly with other agents.
- In a third, agents act through brokerage models that connect agents and brand sites.

The common outcome is that **purchasing becomes more automated**, while **the information required to make a purchase becomes more structured.**

For retailers, this shift tends to show up in three interconnected ways:

1 Customer experiences are reimagined around "delegated" interactions.

2 Marketing becomes less about persuading a human and more about being selected by a machine.

3 Payments and fraud controls evolve to support non-human purchasers acting on behalf of customers.

The payments layer is already moving. PayPal has been building agentic commerce services designed to make inventory and fulfilment easier for AI agents to interpret and act on[4]. Major payment networks are also defining protocols for agent-driven payments, including Visa's Trusted Agent Protocol[5], Mastercard's Agent Pay Acceptance Framework[6], and Google's Agent Payments Protocol[7].

Some forecasts position this as a material channel shift over time. PayPal's stated "north star" is that up to 25% of ecommerce spend could be agent-driven by 2030[8]. Whether or not that exact figure holds, the direction is clear: payment and identity rails are being adapted for delegated purchasing.

Up to 25% of ecommerce spend could be agent-driven by 2030.

Why it matters

The competitive battleground shifts towards **operational legibility**. If your systems cannot reliably express what an agent needs to decide, including delivery options, delivery dates, and returns terms, you become easier to exclude from consideration without a human ever seeing your brand page.

Retail media networks and the expansion into post-purchase

Retail media has moved from a side project to a core business model. Retailers are monetizing two assets that brands compete for: first-party purchase data and the digital surfaces where buying decisions happen.

The next growth wave pushes beyond search and category pages into **post-purchase territory**, including order confirmation, tracking, and returns, where attention is high and trust is fragile. This shift matters because it creates a **hard trade-off**: grow media revenue, without weakening delivery promises and post-purchase clarity.

Where we are now

Retail media has graduated from “extra revenue” to **a serious line item in European advertising budgets**. It is also growing faster than the wider ad market. IAB Europe’s outlook puts the market at roughly €31bn by 2028[9]. The UK offers a clear signal of the trajectory. IAB UK forecasts[10] retail media spend to surpass £1bn in 2025 excluding Amazon, and break £7bn by 2028, including Amazon.

UK retail media spend could pass £7bn by 2028.

Advertisers are leaning in for two reasons confirmed in IAB Europe's research: retailers hold strong first-party shopping data, and retail media reaches people at the moment they are deciding what to buy.

Major players are already executing on the standard playbook. Carrefour is expanding through partnerships spanning in-store and digital inventory[11]. Tesco continues to build out its Media and Insight Platform. Zalando positions ZMS as its dedicated unit. This is not limited to the largest markets: Nordic leaders like ICA in Sweden and Kesko in Finland are building similar propositions around first-party data and owned channels.

The boundary of what counts as a retail media surface is expanding. Some retailers and marketplaces are starting to treat post-purchase moments as commercial inventory, because customers actively pay attention there. Just Eat Takeaway's partnership with Rokt[12] explicitly treats the order confirmation moment as an ad surface.

Where we're heading

The next phase is **orchestration** rather than simply adding ad placements. While IAB Europe's research shows that on-site placements dominate budgets today, the emphasis is shifting toward connecting on-site, off-site, and in-store touchpoints into a single plan. ICA's Head of Retail Media describes the future as orchestration, moving away from isolated placements toward joined-up planning across digital and physical retail.

This expansion increasingly reaches into post-purchase, because confirmation and tracking are **high-attention touchpoints**. The challenge is that these moments also carry the highest trust burden. As retail media spreads across more surfaces, measurement becomes a gating factor. IAB Europe identifies inconsistent measurement as a major blocker for buyers. The winners in this next phase will be the ones that can offer standardized, comparable metrics across channels, including post-purchase inventory.

Why it matters

This is fundamentally **a margin story**. Western European retailers operate on very thin operating margins. McKinsey's State of Grocery Retail Europe 2025 reports that average EBIT for European grocers has dropped to 2.8%[13]. That means a retailer keeps about €2.80 of operating profit for every €100 in sales. In that context, high-margin media revenue becomes a serious profit pool, and a funding mechanism for the business.

But the **financial imperative collides with customer experience**. Checkout, confirmation, tracking, and returns exist to answer a single anxious question: "What is happening with my order?" Baymard's research highlights how central order tracking is to self-service[14]. If these pages become cluttered with ads or confusing offers, the cost is not limited to conversion. It also increases support contacts and reduces the likelihood of repeat purchase. Retailers need media revenue, and they cannot afford to weaken the post-purchase trust that drives retention.

Phygital and omnichannel: E-commerce and in-store blur

Omnichannel has become **the default retail operating model**. Shoppers move fluidly between mobile journeys, stores, pickup points, and lockers. They expect inventory, delivery options, and returns to stay consistent across every touchpoint. This shift raises the bar on coordination. Stores increasingly act as fulfilment nodes. Inventory accuracy matters more. Promise-making at checkout, tracking, and returns must reflect what can be executed.

Omnichannel exposes weak links quickly: a failed pickup handover or unclear return status is enough to erode trust and drive avoidable support contacts.

35% of European shoppers regularly use lockers or parcel shops.

Where we are now

Customer behavior already spans channels. People browse online, collect in-store, and return out-of-home. The experience is judged in the moments that confirm or break confidence, including whether options remain available, whether delivery promises are clear, and whether returns and refunds stay visible.

Hybrid fulfilment is mainstream, and **out-of-home delivery is a growing preference**. Across Europe, 35% of shoppers regularly have items delivered to out-of-home locations such as parcel shops or lockers, compared with 25% globally. In the UK, DHL's 2025 research shows that nearly 20% of shoppers now prefer lockers or parcel shops[15]. In the Nordics, the expectation is even higher. PostNord reports that 77% of consumers say the ability to choose a pickup location is the most important factor when deciding where to shop[16].

But out-of-home only feels seamless when carriers can interoperate across lockers, parcel shops, and pickup points, with consistent handover events and proof that flows through tracking and returns.

Returns are shifting out-of-home even faster than deliveries. DHL's data shows that 79% of shoppers in Europe prefer to return unwanted items via a parcel locker or shop. This matters because returns sit at the intersection of customer experience and cost-to-serve. When return routes are unclear or hard to track, "where is my refund" contacts rise and margin leakage follows.

Where we're heading

In 2026, omnichannel maturity becomes **an operational default**. Stores, carriers, lockers, and pickup points must behave like one connected system.

Stores are taking on **fulfilment responsibilities at greater scale**. As retailers expand click-and-collect, ship-from-store, and in-store returns, stores need process, space, and tooling to pick, pack, and hand over parcels reliably. Deloitte describes this as Unified Commerce[17], where physical locations are used as distribution nodes to enable faster service.

Pickup and drop-off networks will keep gaining importance. Ecommerce Europe[18] notes that locker and pickup point delivery has become a major differentiator. PostNord's data reinforces that delivery options influence customer choice, and that pickup-location preference is a strong driver in Nordic markets[19].

Promise accuracy becomes the primary experience metric. When shoppers mix channels, the experience is only as strong as the data underneath it. Checkout must show what is actually possible. Tracking needs to match reality. Returns and refunds need to stay transparent across handovers. Deloitte points out that consumers increasingly expect similar service levels across channels and sellers.

Why it matters

Phygital performance is measured by consistency. Offering many options helps only when the options work together and remain reliable across channels. When stores play a role in fulfilment, retailers benefit from a joined-up operating model that reduces duplicated processes, stranded stock, and conflicting promises.

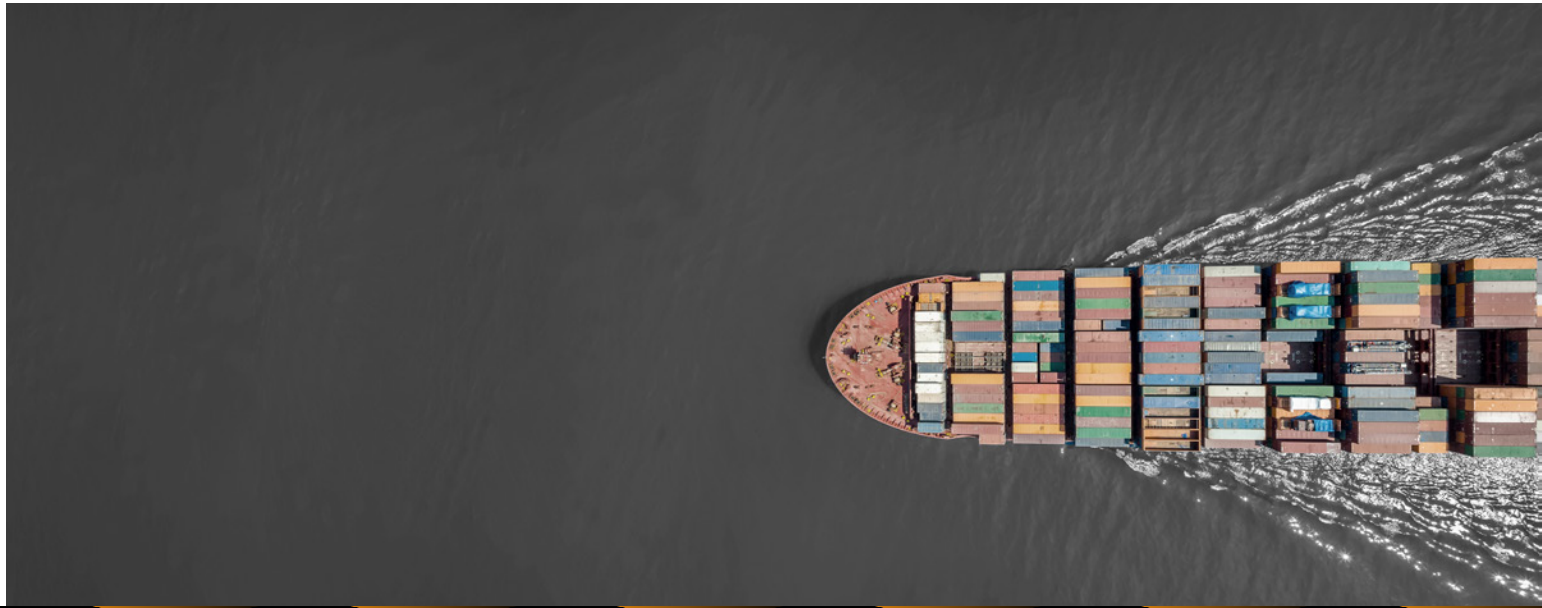
Choice increasingly extends beyond home delivery. In Nordic markets, the ability to choose a pickup location directly influences where customers shop. Returns are also where margins leak. As channel-mixing becomes normal, it becomes more important to guide returns into routes that balance cost, speed, and traceability.

Promise accuracy is the trust lever. Customers expect pickup readiness to be true, delivery dates to be credible, and return handovers to remain visible. Baymard's research[20] finds that tracking open orders is the most important self-service feature. When visibility fails, confidence drops quickly.

Shopping without borders: Cross-border convenience and choice

Cross-border ecommerce in Europe has become a mainstream source of **incremental demand**. Customers buy abroad for price and assortment, then judge the experience through a narrower lens: total cost clarity, familiar payment protections, delivery options that match local norms, and returns they can trust.

This shift matters because **execution defines outcomes**. Clear promises and visible returns turn international interest into repeat purchases. Poor promise clarity and weak visibility drive abandonment and support load. Regulatory tightening around customs and data increases the operational cost of getting cross-border wrong.



Where we are now

Cross-border shopping is firmly established in European ecommerce behavior. Cross-Border Commerce Europe estimates the European market at €358.7bn in 2024 and 2025, and notes that around 70% of turnover is generated by online marketplaces[21]. This shapes the economics of cross-border demand. Many customer journeys start on marketplaces, and brands compete in a global comparison set by default.

In the Nordics, cross-border purchasing is frequent. PostNord reports that 73% of Nordic consumers have bought online from abroad in 2024, with 48% doing so monthly[22]. In the UK, Signifyd frames cross-border sales, up 4% year over year, as a growth lever tied to localized payments and efficient logistics[23].

Customer motivation is stable. Better choice and better prices are consistent drivers. The variable that moves conversion is **risk tolerance**. DHL's 2025 consumer research[24] positions free delivery as a primary driver, and highlights trust as the limiting factor. When delivery promises are vague, returns processes are unclear, or fees appear late, shoppers hesitate and abandon.

73% of Nordic consumers bought online from abroad last year.

Where we're heading

Cross-border growth continues through 2026, and the **operational bar rises** in parallel. Retailers that convert cross-border demand treat localization as a core experience requirement, not a translation task.

Checkout clarity **becomes a conversion gate**. Shoppers convert when the offer feels local, including prices in local currency, familiar payment protection, clear customs charges, and delivery providers they recognize. DHL's research[25] reinforces that clarity on total cost and returns is a deciding factor, since uncertainty around returns reduces conversion quickly.

Regulatory compliance becomes more data dependent. Customs reform and stricter scrutiny of low-value parcels are pushing retailers toward more accurate product data and declarations. The practical implication is that inaccurate product codes and vague declarations create higher friction and can block shipments.

Convenience increasingly routes through **pickup and drop-off networks**. As marketplaces drive more cross-border volume, customers expect delivery and returns to fit their routines. Lockers and parcel shops reduce missed deliveries and simplify the return leg. Clear proof of handover strengthens confidence when the journey spans multiple parties and borders.

Why it matters

Cross-border growth adds demand, and it also amplifies promise risk. Customers make fewer allowances when buying abroad. They want certainty on total cost, delivery timeline, and return location. Confidence drives conversion and repeat purchase. Uncertainty drives hesitation, abandonment, and higher contact rates.

Cross-border also compresses margin through additional cost and complexity, including carrier handovers, customs administration, and higher return risk. Treating cross-border as an operating discipline protects margin. That discipline starts early with clear promises at checkout, then continues through consistent tracking and visible returns and refunds across markets. It also multiplies carrier handovers, which raises the cost of inconsistency in status events, exception reasons, and proof of pickup and return drop-off.

The most sensitive points in the cross-border journey are **checkout, tracking, and returns**. Tracking messages that lack explanation and returns that lack visibility trigger distrust and reduce the likelihood of a second purchase. Retailers who win in cross-border design for confidence, using coherent tracking and step-by-step return and refund visibility so customers always know what is happening.

Two foundations behind the new retail reality

The new retail reality shows up in the four shifts we've discussed so far, from agent-assisted shopping to omnichannel fulfilment and cross-border growth.

Together, **they raise the bar in two places**: retailers need offers that can be evaluated with confidence, and they need post-purchase experiences that keep trust intact when reality changes. Both foundations depend on the same thing: carrier networks that can express structured terms and event truth consistently, even when the journey spans multiple partners.

Agent legibility

As AI-mediated shopping grows, offers will increasingly be compared and executed automatically.

Delivery and returns terms need to be interpretable by systems as well as humans. The requirement is structured, consistent information that captures what a decision-maker needs, including delivery options, cutoff times, delivery windows, fees, location constraints, and returns eligibility and timeframes.

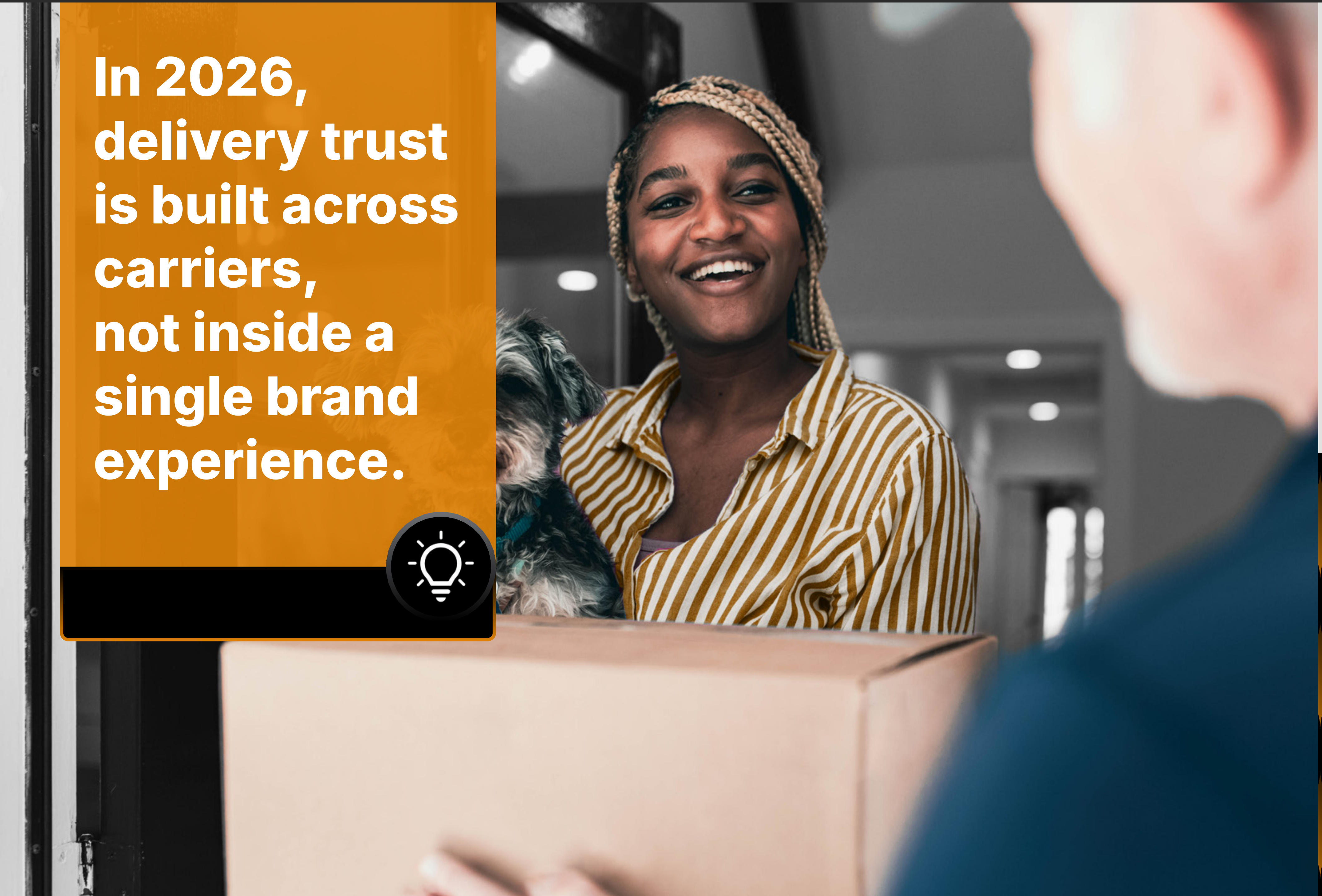
Consistency across channels matters because automated decisioning optimizes for certainty. When terms are incomplete or vary by touchpoint, decisioning tends to favor options that are easier to interpret.

Service truth

Higher expectations raise the cost of uncertainty. Automation can resolve routine questions when it has reliable status, clear exception reasons, and seamless escalation for complex cases.

The winning pattern is truth-first communication: what is happening, what happens next, and what the customer can do.

Proof points support confidence, including confirmation, tracking milestones, pickup readiness, return drop-off proof, and refund status. When progress stays visible, support contacts fall and repeat purchase becomes more likely.



In 2026, delivery trust is built across carriers, not inside a single brand experience.

The next section looks at what makes this repeatable: a consistent view of the promise, the execution, and what the customer sees after purchase.

SECTION TWO

CAPABILITIES:

The truth layer

Retailers are being judged on **promise accuracy and follow-through**. Customers want the option they chose at checkout to stay credible, the tracking story to stay clear, and the returns journey to stay visible through to refund.

A **truth layer** makes that consistency possible. It connects three views of the same journey: what was offered and chosen, what is happening across carriers and channels, and what the customer sees in tracking, returns, and refunds.

Three capabilities make this repeatable at scale: automation with controls, service that scales with evidence, and measurement that closes the loop.

Automation that earns trust

To meet the expectation of reliable promises and fewer surprises across checkout, delivery, and returns, you need **automation that is governed, explainable, and anchored in operational truth**.

AI is moving from content and chat into operations, where it can trigger real actions. That includes refunds, reships, reroutes, claims decisions, and proactive messaging. Speed and scale are real advantages here, and they come with **a clear operational price**: small data gaps and small process flaws can repeat fast when automation runs end to end.

This is why the practical shift in 2026 is **pragmatic automation**. Teams are moving from experimentation to control, auditability, and clean operational data. BCG notes[26] that leading retailers are redirecting spend from AI pilots into the building blocks, including high-quality data and scalable infrastructure that turns experiments into repeatable operations.

What must be true:

Human validation is designed, not improvised.

Retailers are formalizing when automated output is allowed to stand and when it requires review, especially for refunds, claims, delivery disputes, and policy interpretation. McKinsey highlights[27] that AI high performers are more likely to have defined processes for human validation of model outputs.

Regulatory readiness becomes operational work.

EU AI Act obligations phase in[29], and the direction of travel is toward stronger documentation and transparency expectations. Retailers increasingly ask vendors and internal teams for governance proof, because it reduces deployment risk.

Governance enables speed.

Teams scale automation through approved data sources, policy guardrails, review flows, and clear accountability. Deloitte frames governance as a strategic differentiator because accountability structures support confident adoption at pace[28].

Event truth is standardized.

Automation depends on consistent post-purchase facts across carriers and markets. GS1 explains that standards like EPCIS[30] are designed to share structured event information that systems can interpret. This supports safer automation and more reliable service journeys.

The next constraint: fraud meets automation

As automation expands, disputes become easier to generate and harder to resolve manually. In the UK, Cifas reports that 19% of consumers have falsely claimed a failed delivery to get a refund[31]. The ECB reports payment fraud value across the EEA rose to €4.2bn in 2024[32]. This pushes retailers toward stronger identity checks and cleaner evidence trails because **weak operational data becomes expensive** under AI-accelerated fraud.

19% of consumers have falsely claimed a failed delivery to get a refund.

Where this is heading

Customer service journeys are increasingly expected to begin and end in conversational, third-party assistants. As service entry shifts outward, the value of consistent post-purchase truth rises. Assistants can only resolve delivery and returns issues when "what happened" is consistent across carriers and markets.

Why it matters for delivery experience

If AI becomes the first line of contact, **customer service becomes a cost-to-serve lever**. Capgemini reports that 31% of organizations are already seeing faster response times from GenAI and 58% expect to[33]. That upside depends on answers grounded in operational facts. When automation produces confident decisions without reliable evidence, the failure repeats at scale and shows up as higher contact volume, incorrect refunds, and damaged loyalty.

This is where **automation either earns trust or creates avoidable cost**. The moments are specific: the delivery options shown at checkout, the carrier events used to tell the tracking story, the return drop-off confirmation used to trigger refunds, and the exception signals used to decide the next action. When these signals are consistent, automation can resolve routine cases and route exceptions with evidence. When they are inconsistent, automation produces escalations and disputes that are expensive to unwind.

nShift works at the point where promises become actions. That view makes it clear why automation needs governance, auditability, and event-level evidence before it can safely trigger refunds, reroutes, and exception flows at scale.

Service that scales without losing the human moment

To meet the expectation of fast, clear answers in delivery and returns moments, you need **service automation** that stays grounded in operational facts and escalates complex cases with context.

Most post-purchase contacts are **requests for certainty**. Customers want the most recent confirmed update, what happens next, and what they can do. This is why conversational AI is moving from simple FAQs into bounded work such as checking an order, interpreting a delay, initiating a return, and confirming refund status.
In delivery, customers increasingly expect to make changes mid-journey, such as redirecting to a pickup point, changing a delivery window, or confirming safe drop preferences. For that to work, carriers need authenticated, real-time change flows, and retailers need those changes to propagate into the same tracking story customers see.

Capgemini's research[34] points to **a shift toward hybrid teams**, where AI agents take on end-to-end workflows and humans focus on higher-value interactions and oversight. In practice, this means "good service" depends less on tone and more on stability. Confirm what is known, make uncertainty visible, resolve the case when the record supports it, and escalate when judgement is required.

What must be true:

Evidence-led communication:

Responses carry the latest confirmed status, a timestamp, and the next step, especially in delays, missing parcels, and refunds.

Defined human validation:

Retailers formalize when automation is allowed to close a case and when it requires review. McKinsey notes[35] that AI high performers are more likely to have defined processes for human validation of model outputs.

A "hallucination firewall":

When the operational record is incomplete or ambiguous, automation pauses, states what is known, and routes the case into a controlled resolution path.

Machine-readable "what happened":

Service automation needs structured event truth. GS1 explains that standards like EPCIS[36] are designed to share event information, including the what, where, when, and why of an object's journey.

Where this is heading

Service entry is shifting outside owned channels. Gartner predicts that by 2028, 70% of customer service journeys will begin and end in conversational, third-party assistants built into mobile devices[37]. This raises the operational bar because retailers cannot rely on channel design to contain the experience. The underlying data must be ready to support resolution wherever the conversation starts.

By 2028, 70% of customer service journeys may begin and end in assistants.

As agentic capability improves, **the winning pattern becomes constrained autonomy**. Service leaders define which case types are safe for end-to-end automation and which should always route through human judgement. In delivery and returns, customers increasingly ask "based on what?" when given a status, eligibility decision, or refund timeline. That expectation rewards systems that can map answers to observable events and stated policies.

Why it matters for delivery experience

Service automation changes the economics of support and the failure mode. When it works, it resolves routine contacts quickly and keeps humans focused on exceptions. When it fails, one stale status, one broken rule, or one unsupported claim can trigger repeat contacts and goodwill spend at scale.

Transparency expectations are tightening for AI interactions and automated decisions (we're discussing this further on, as a key constraint). This pushes teams toward service designs that can be explained to customers and staff, with clear disclosure, escalation paths, and evidence trails.

nShift supports post-purchase journeys where customers look for certainty, including tracking and returns. That view is why we focus on service automation that can reference confirmed events, handle routine questions cleanly, and escalate with full context when judgement is required.

Measurement, truth, and feedback loops

To meet the expectation of promises that hold up and updates that feel proactive, you need **measurement** that reflects customer reality and feeds improvements back into the delivery and returns experience.

Personalization increasingly changes what a shopper is told they can do, what options appear, what looks available, and what gets promised after checkout. That raises the stakes for delivery experience because tailored promises are judged as personal commitments. Clean underlying data and clear permission become the foundations. When either one is weak, the **downstream impact** shows up in contacts, disputes, and lost repeat purchase.

Where we are now

Across Europe, targeting is already operational. Eurostat reports that among EU enterprises paying for online advertising in 2024, nearly 42% use behavioral targeting and 44% use geo-targeting[38]. At the same time, consumers are tightening data access: 54% of EU internet users refused to allow their personal data to be used for advertising in 2023. This tension makes third-party signals less reliable and raises the value of first-party, experience-grounded measurement.

42% of EU enterprises paying for online advertising use behavioral targeting; 44% use geo-targeting.

What must be true:

Promise-to-outcome linkage:

Connect what was offered at checkout to what happened in the carrier network and what the customer saw in tracking, returns, and refunds.

Permission as an operating discipline:

Ensure commercial personalization appears only where it is permitted, while essential customer information remains accessible regardless.

Operational reality checks:

Treat post-purchase outcomes as part of optimization, including promise drift, exception patterns, and avoidable contact triggers.

Information-first post-purchase surfaces:

Keep tracking and returns touchpoints anchored in verified order information; govern optional commercial modules separately to protect trust.

Where we're heading

Regulation is drawing **clearer boundaries around targeting**. The European Commission explains that the Digital Services Act introduces a complete ban on targeted advertisements to children, alongside wider transparency obligations. Privacy interpretation is also becoming more operationally specific, with EDPB guidelines framing social targeting as a practice that can create meaningful risk to individual rights in higher-risk cases.

The performance edge shifts toward **feedback loops built from operational outcomes**. That means connecting what was promised at checkout, what happened in the carrier network, and what the customer experienced, then feeding that learning back into promise logic, notification rules, and exception handling.

Why it matters for delivery experience

Measurement shapes what teams optimize. When optimization focuses on conversion alone, it can push friction into delivery and returns. When it includes post-purchase outcomes, it becomes an operational reality check that protects trust and retention. The practical goal is **compounding improvement**: fewer surprises over time because teams learn from promise drift, exception patterns, and contact triggers, then adjust what they promise and how they communicate it.

nShift spans what is promised, what is executed, and what the customer sees after purchase. That continuity is why feedback loops matter. When teams link promise to outcome, they can improve promise accuracy, reduce avoidable contacts, and make returns and refunds more predictable over time.

SECTION THREE

CONSTRAINTS:

What's shaping the playing field

Customer expectations move quickly. Constraints move slower, and they shape what is actually possible. In 2026, **two constraints** define the playing field for delivery and returns leaders.

Regulatory

AI guardrails and consumer rights are tightening, which raises the bar on disclosure, traceability, and defensible outcomes.

Geopolitical

Trade friction, lane disruption, and customs change are now frequent enough to affect day-to-day promises.

These are the rules of the game you plan around, and the guardrails you design into systems so **the delivery experience holds up under scrutiny and volatility**.

Regulation, AI guardrails, consumer rights

Regulation defines what you are allowed to do while meeting rising expectations. In 2026, **automation is judged on whether it is defensible**: explainable to customers, supportable in disputes, and consistent across markets.

Transparency requirements are becoming concrete. The EU AI Act[39] is phasing in obligations, and the EU AI Act Service Desk[40] indicates that transparency requirements for AI interactions start applying from August 2026. Article 50 explicitly requires that people be informed when they are interacting with an AI system. In the UK, ICO guidance emphasizes that fairness and data protection requirements apply fully to AI systems[41].

That matters because delivery and returns sit in the highest-scrutiny zone. They touch money, personal data, refunds, and complaints. When automation is involved, "proof" stops being a nice-to-have and becomes part of your operating model.

EU AI Act transparency requirements for AI interactions start applying from August 2026.

Design constraints you cannot ignore:

Disclosure is part of the experience design.

If AI is used in customer-facing interactions, you need a clear disclosure pattern and a consistent way to communicate decisions, especially when outcomes affect eligibility, refunds, or claims.

Human oversight must be designed.

Controls are not a principle. They are an operating system: defined triggers, review steps, and clear accountability for decisions that carry financial impact or customer rights implications.

Traceability is non-negotiable.

When a customer disputes a delivery status, a return eligibility, or a refund timeline, the business needs an event trail that supports the answer. This is where “show your work” becomes a customer expectation in AI-mediated journeys.

Truth beats tone in high-stakes moments.

When customers are anxious about late parcels, missing orders, or slow refunds, reassurance without evidence increases risk. The service pattern that scales is a factual update, a timestamp, and a next step, with clean escalation when the record is incomplete.

What this means in practice

The winners are not the teams with the most automation. They are the teams whose automation can produce evidence, cite the latest confirmed status, and route exceptions cleanly when the record is incomplete. That is how you scale service without creating new risk.

More than 2,500 trade restrictions were imposed in the first 10 months of 2025.

Geopolitics, customs friction, route volatility

Geopolitical uncertainty is now an operating condition, not an occasional shock. When conditions shift, the right checkout promise and the right post-purchase message can change by market overnight. The challenge is making those changes fast, consistent, and trust-preserving.

Trade friction is rising. The World Bank notes that in the first ten months of **2025** alone, more than **2,500** trade restrictions were imposed worldwide[42]. The WTO reports that the cumulative "stockpile" of G20 import-related measures has steadily increased since 2009, covering nearly **17%** of world imports by late 2025[43].

Transport lanes remain vulnerable to disruption. UN Trade and Development reports that Red Sea disruptions and Cape rerouting extended voyage times, reduced effective capacity, and increased operating costs[44].

Customs is also becoming product work. The EU Council confirms that from **July 1, 2026**, goods entering the EU in small consignments under **€150** will be subject to a fixed **€3** customs duty, a change covering **93%** of all e-commerce flows into the EU[45]. That scale lands directly in checkout wording, duty clarity, tracking updates, and returns instructions.

Design constraints you cannot ignore:

Promises must be editable without rebuilds:

When conditions change, retailers need to adjust delivery options, ETAs, fees clarity, and customer messaging by market in a controlled way, without inconsistent updates across channels.

Volatility increases the value of a single operational story

Disruption creates more exceptions. If customers and support teams see conflicting statuses or vague explanations, contact volume rises and trust drops; when performance and capacity shift quickly, retailers rely more on consistent service signals across carriers, because rerouting volume only works when the operational story stays coherent.

Cost disclosure must stay clean under policy change

Customs and trade policy shifts increase the penalty for late surprises. "Total cost clarity" becomes a resilience capability, not just a checkout UX principle.

Decision rights must be explicit.

The World Economic Forum argues that geopolitical intelligence must sit inside business decisions, not beside them[46]. Operationally, that means clearer triggers, ownership, and cadence for promise changes across markets.

What this means in practice

In a volatile environment, **trust is protected by consistency**. The ability to change promises deliberately, keep the customer narrative coherent during exceptions, and make cost impacts legible early becomes the difference between disruption as a margin leak and disruption as a managed condition.

SECTION FOUR

BLUEPRINT:

Turning insights into action

Trends are useful when they change decisions. The fastest way to turn this report into action is to treat delivery and returns as a controlled system, then tighten the few points where trust leaks. This section gives you a readiness checklist, a capability map expressed as outcomes, a short set of signals to watch through 2026, and a practical next step.

Readiness checklist

Use this as a working checklist with your ecommerce, CX, and operations leads. If you cannot answer “yes” confidently, it is a priority.

Promise and options

- ☐ Delivery options shown at checkout reflect real constraints by basket, destination, and service coverage.
- ☐ Delivery and returns terms stay consistent across channels, including marketplaces and store journeys.
- ☐ Landed cost, fees, and duties are clear early enough to avoid late surprises, especially cross-border.
- ☐ You can update promise logic quickly by market when conditions change, with governance and traceability.

Post-purchase truth and proof

- ☐ Carrier performance and exception patterns are visible by lane and service, and can be used to adjust promises and routing decisions.
- ☐ Carrier events are normalized into a consistent status story customers can understand.
- ☐ Exceptions trigger clear next steps, including proactive messages and controlled recovery paths.
- ☐ Returns have proof points, including drop-off confirmation and a visible path to refund status.
- ☐ Support teams see the same operational truth customers see, with timestamps and evidence.

Automation that earns trust

- Case types are defined where automation can close the loop safely, and case types are defined that require review.
- Customer-facing automation uses evidence-led responses, including the latest confirmed status, a timestamp, and the next step.
- AI interactions follow disclosure requirements where relevant, including EU transparency obligations beginning to apply from August 2026 in relevant contexts.
- An audit trail exists for outcomes such as refunds, claims, and eligibility decisions.

Feedback loops

- The promise offered at checkout can be linked to operational execution and customer-visible outcomes.
- Promise drift, exception patterns, WISMO triggers, and refund timeline predictability are measured.
- Outcomes feed back into promise rules, notification logic, and exception playbooks.
- Consent and permission handling is treated as an operating discipline, especially on post-purchase surfaces.

Capability map

The outcomes below describe what delivery and returns leaders are being asked to deliver in 2026. They capture what "good" increasingly looks like across checkout, tracking, and returns, prioritizing the customer experience.

Use this list to align ecommerce, operations, and CX on what "good" looks like, then decide where to invest first.

1. Promise design and control

Outcome: checkout promises that hold up

Customers see delivery choices that remain credible once the order meets real fulfilment and carrier constraints. Cross-border orders feel local, including familiar options and clear returns terms. Delivery claims used in acquisition and retail media remain aligned with operational reality in each market.

2. Post-purchase truth and confidence

Outcome: one coherent post-purchase story

Tracking reads as a clear narrative with consistent statuses across carriers and clean explanations when something changes. Exceptions trigger next steps that customers can act on. Support teams and customers share the same truth, reducing rework and repeat contacts.

3. Returns and refunds visibility

Outcome: returns that feel visible and predictable
Returns initiation is simple, drop-off is provable, and refund progress stays visible. Cross-border returns avoid "black hole" moments through early return events and clear status updates. Returns routing supports margin while preserving confidence.

4. Safe automation and governance

Outcome: automation that scales safely
Automation is bounded by policy and evidence, with designed human validation for high-impact decisions. Service automation is portable across channels because the underlying event truth is consistent. Disputes and fraud are handled with stronger evidence trails and clearer decision logic.

5. Continuous improvement

Outcome: compounding improvement
The organization learns from promise drift, exceptions, contacts, and refund timelines, then adjusts promise rules, notification logic, and exception playbooks. Measurement acts as an operational reality check and keeps improvement compounding over time.

Signals to watch in 2026

These signals show when delivery experience is being stress-tested, and where trust is most likely to leak.

AI-mediated shopping and delegated purchasing expands

- **What it changes:** delivery and returns terms need to be machine-readable and consistent across channels.
- **What to do:** standardize terms, service names, cutoffs, windows, fees, and returns eligibility in structured form.

Retail media pushes deeper into post-purchase touchpoints

- **What it changes:** tracking and returns journeys become higher-attention surfaces.
- **What to do:** protect reassurance moments, keep service information dominant, and govern commercial modules separately.

Omnichannel and out-of-home delivery grows

- **What it changes:** handovers, inventory truth, and proof requirements become more complex.
- **What to do:** strengthen handover events, pickup readiness, and proof points across locations and networks.

EU AI transparency obligations begin to apply from August 2026 in relevant contexts

- **What it changes:** disclosure and explainability become a customer experience requirement.
- **What to do:** implement clear disclosure, defined escalation, and auditable decision trails for automated outcomes.

Cross-border policy and customs change lands directly in experience design

- **What it changes:** landed-cost clarity and duties become part of trust, not only compliance.
- **What to do:** update duty logic and messaging early in the journey and keep returns instructions country-specific.

Trade friction and route volatility continue to create promise volatility

- **What it changes:** ETAs and service availability change more frequently by lane and market.
- **What to do:** make promise logic editable by market without rebuilds and keep exception narratives consistent.

Map where trust leaks

The fastest way to improve delivery experience is to find where promises drift, where visibility breaks, and where returns lose proof. Start with one market and one category, then map checkout, tracking, and returns through to refund.

If you want to turn insights into action, nShift can help you map the breakpoints and turn them into an execution plan that fits your current carrier network, service levels, and markets. Get in touch to review how your delivery and post-purchase experience compares to the priorities in this report, and discuss practical next steps for modernizing carrier connectivity, checkout, and tracking without a full replatform.

Talk to us

About nShift

nShift helps retailers deliver experiences that stay credible after the Buy button. We connect checkout, carrier execution, tracking, and returns so the customer sees a consistent version of what was offered and what is happening, even when conditions change.

Checkout that stays credible in the real world

Show delivery and returns options that reflect real carrier and fulfilment constraints, including local options and real-time ETAs where available. This helps align what customers see on-site with what operations can execute.

Post-purchase visibility customers can trust

Turn carrier events into clear customer-facing updates and branded tracking journeys that reduce uncertainty and support loyalty. When status stays consistent, customer confidence holds.

A delivery data layer built for systems and scale

Expose booking, labels, events, and emissions through APIs so ecommerce, ERP, WMS, customer service tools, and AI assistants work from the same shipment truth. This is the foundation for agent legibility and operational truth across markets.

European and cross-border depth

Support multi-country delivery with strong European carrier coverage and the operational patterns that matter when customs friction and compliance requirements increase.

nShift

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