The Social Commerce Report 2026

ECDB

What This Report Covers

Social commerce is already proven revenue in Asia and arriving in the West. Five chapters size the channel, separate the platforms that own the checkout, lay out the social-first funnel, and work a brand example end to end.

Sources: ECDB

Social Commerce Is Not a Forecast

Commerce that happens natively on social and video platforms is often treated as emerging. In Asia it is already proven revenue: two of the ten largest online retailers on earth are Chinese social commerce platforms.

GLOBAL TOP 10	COMBINED GMV	DOUYIN + TIKTOK	EUROPE · EARLY
2 of 10	**~$876 bn**	**$656 bn**	**$0.2 bn**
Largest online retailers worldwide are social platforms, both Chinese.	Combined GMV of the two in 2025.	Douyin and TikTok GMV in 2025.	TikTok Shop GMV in Germany, still early in Europe.

SO WHAT

This is not a channel to watch; in Asia the social-native model already moves close to a trillion dollars a year. But in Europe it is only beginning, **and that gap is the opening for early movers.**

Notes: Social commerce follows the market standard: commerce native to social platforms. All figures are ECDB modeled estimates.

Sources: ECDB

Social Commerce Is Already at the Top

The ten largest online retailers worldwide, by GMV. Mint marks the social commerce platforms native to social feeds; everything else is a marketplace, shown for context.

1	**Amazon**	Marketplace
2	**Pinduoduo**	Marketplace
3	**Douyin / TikTok**	**Social commerce**
4	**Taobao**	Marketplace
5	**Tmall**	Marketplace
6	**JD**	Marketplace
7	**Kuaishou**	**Social commerce**
8	**Walmart**	Retailer
9	**Shopee**	Marketplace
10	**Temu**	Marketplace

SO WHAT

Douyin, the sister app of TikTok, is the **third-largest online retailer in the world** , and with Kuaishou two of the top ten are social commerce, both Chinese. This channel is not emerging in Asia; it is already at the top.

Notes: Ranked by global GMV. Marketplaces are shown for context but not counted as social commerce.

Sources: ECDB

Two Directions of Social Commerce

Social commerce is converging from two sides. Social platforms are adding shopping, and retailers are adding social features. Neither side is purely one thing, which is why the space keeps growing.

Social platforms that sell

Commerce is built into the feed. The platform owns discovery, content and checkout.

- **Douyin & TikTok Shop**, livestream and short-video selling
- **Kuaishou**, short-video commerce at scale
- **Bilibili**, community video, commerce emerging

Retailers that add social

- **Vinted · $12bn**, marketplace with social features: follow, like, comment.
- **Depop · $1.1bn** , almost all social, an Instagram-like feed, but keeps search and a normal checkout.
- **WEBUY · <$0.1bn** , group buying: a leader shares a deal, orders pool, payment settles in-app.

SO WHAT

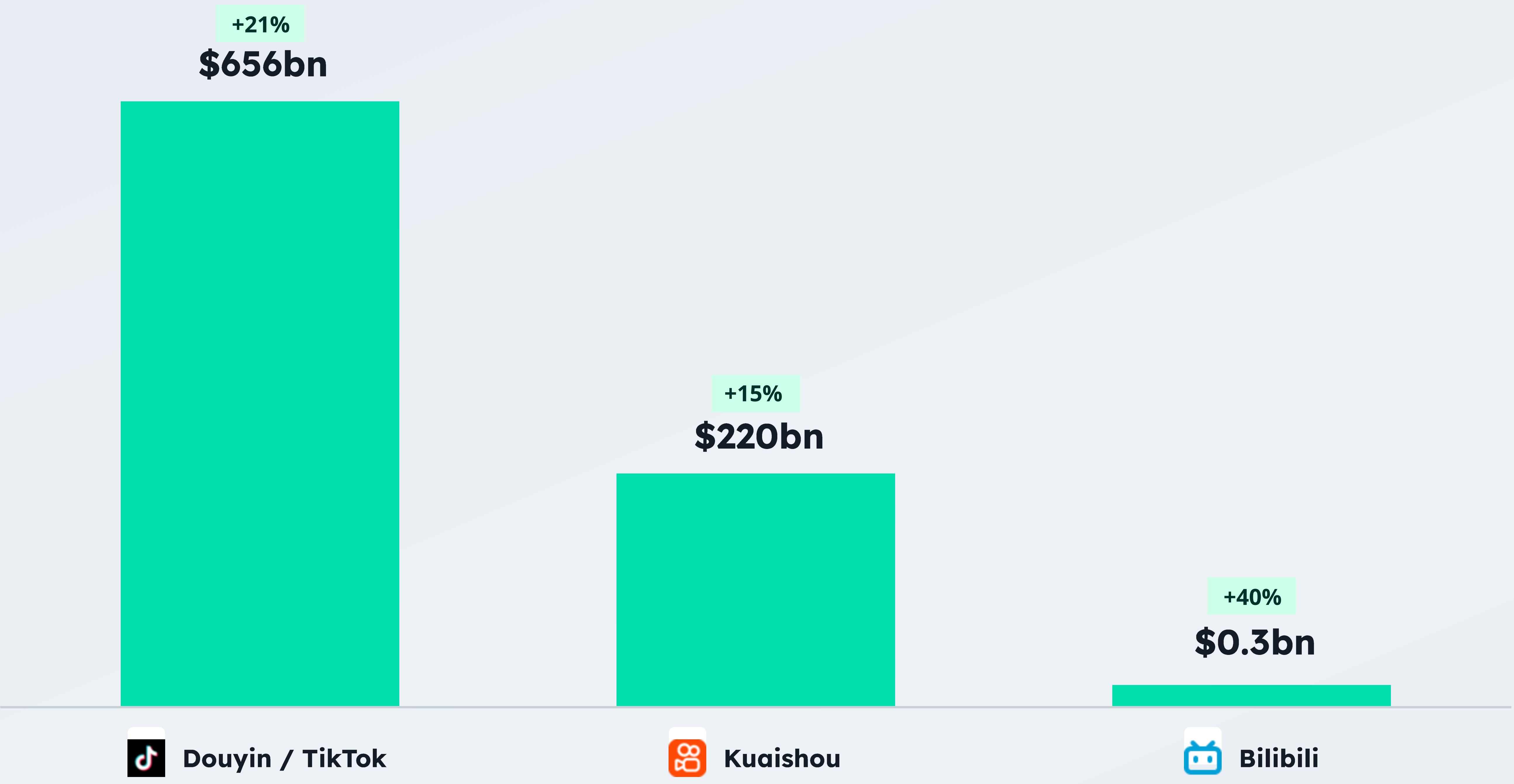
Social commerce is a spectrum, not a single model. Sell where a social platform owns the checkout, and add social mechanics to your own store. Even the most social retailers still run their own search and checkout.

Notes: GMV is ECDB modeled 2025. Vinted, Depop and WEBUY are not counted in the social-native totals; they show the other direction of social commerce.

Sources: ECDB

The Scale of the Social Natives

Social-native platforms, where commerce is built into the feed, 2025 GMV (US$) and growth



An Asian Model, at Massive Scale

Douyin and Kuaishou together moved about **$876 bn in 2025** , more than any single Western retailer except Amazon. Bilibili shows the next wave forming behind them.

SO WHAT

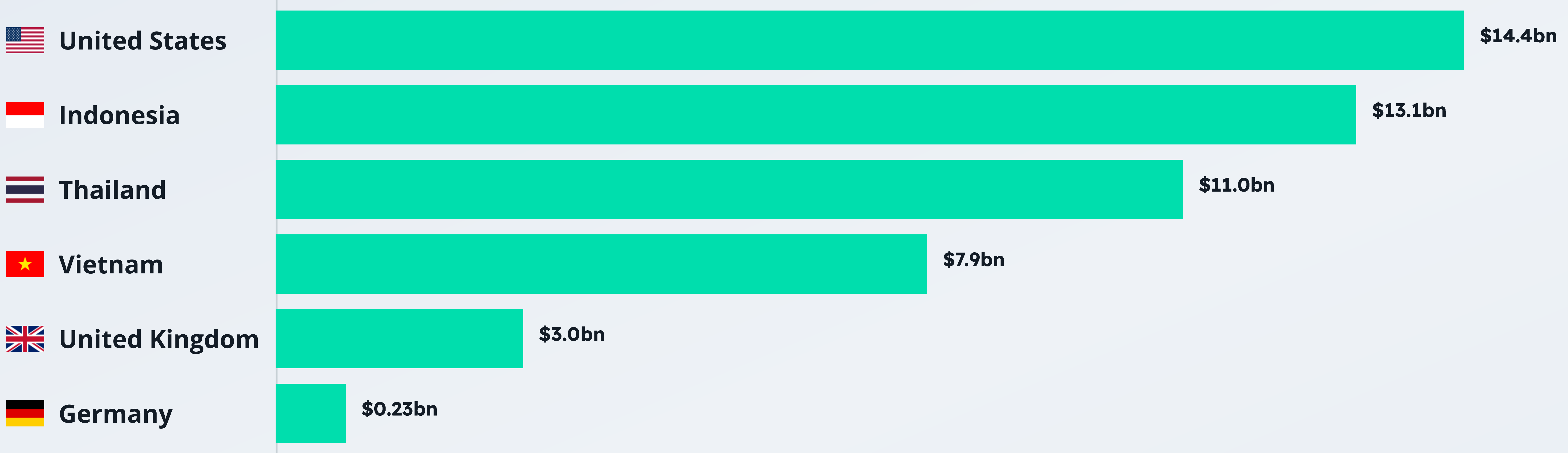
The proven model is Chinese and already at massive scale. Douyin, the same platform as TikTok, grows fastest at +21%, and it is the model **TikTok Shop is now exporting West.**

Notes: GMV is the value of goods sold through the platform. Growth is 2024 to 2025.

Sources: ECDB

The West Is Next

TikTok Shop is Douyin's model exported. Outside China, which is 90% of Douyin and TikTok GMV, it is already large in the US and Southeast Asia, scaling in the UK, and barely started in Germany.



SO WHAT

The Western frontier is real but uneven. The US and Southeast Asia are already multibillion, the UK is scaling, and Germany is barely started at $230 m. **That gap is exactly where the runway is longest for a brand that moves early.**

Notes: TikTok Shop GMV is the non-China share of the Douyin and TikTok retailer. China alone is US$ 592 billion.

Sources: ECDB

Who Owns the Checkout

Social platforms differ on one thing that decides everything: whether the sale happens inside the app, or whether the platform only drives discovery and hands the buyer off.

Platform	Owns checkout	Core strength	Best for
TikTok Shop	Yes, in-app	Short video + live, impulse discovery	Creator-led launches, viral products
Instagram	Partly, often handoff	Brand and creator content, shopping tags	Brand building, considered buys
Pinterest	No, refers out	High-intent planning and search	Top-of-funnel demand
Douyin, Kuaishou	Yes, full stack	Entertainment + live selling at scale	The proven model the West copies

SO WHAT

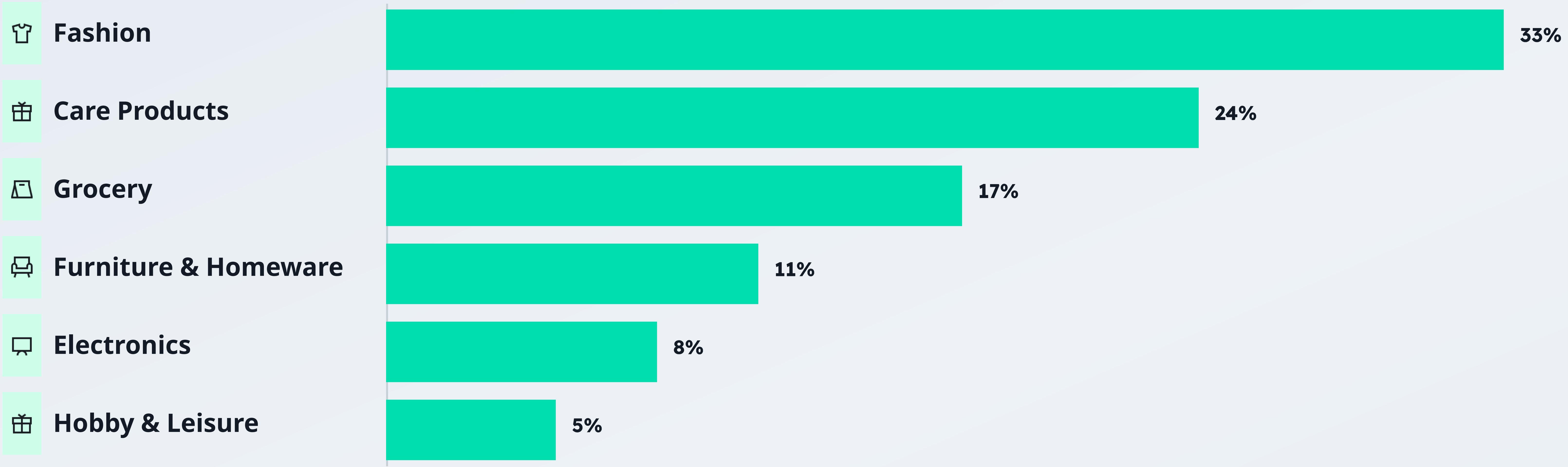
The dividing line is the checkout. Platforms that own it capture measurable GMV and rank among the largest retailers. Instagram and Pinterest mostly create demand that converts elsewhere, **measure them on assisted demand, not last click.**

Notes: Checkout ownership reflects each platform's native commerce model. GMV is only measurable where the platform owns the transaction.

Sources: ECDB

What Sells on Social

The category mix of Douyin and TikTok, the largest social commerce platform. A few categories dominate: fashion, beauty and food, the ones built for creators, demos and impulse.



SO WHAT

Social commerce is not for every category. Fashion at a third, beauty at 18% of all GMV, and food carry most of what sells. For apparel, beauty and food brands the path is clear; for big-ticket categories, **social is discovery, not checkout.**

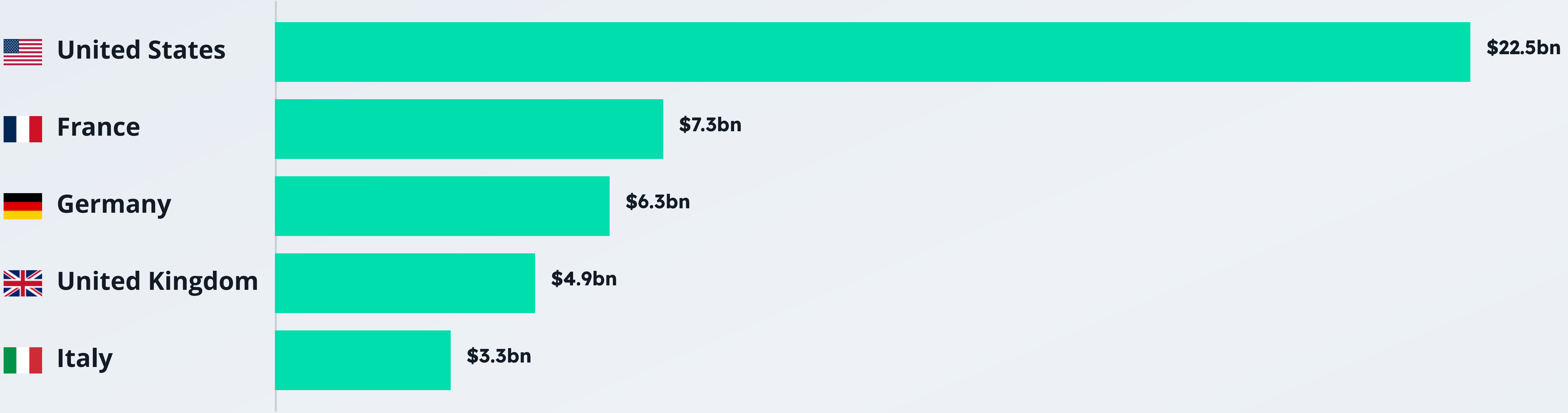
Notes: Category shares of the Douyin and TikTok retailer. Care Products is mostly personal care and beauty at 18% of total GMV.

Sources: ECDB

The Cross-Border Wave

Temu is a cross-border marketplace, not social commerce, but it shapes the same feeds and price expectations. Shipping from China straight to Western consumers, its purchases abroad are already large.

TEMU GMV IN WESTERN MARKETS, 2025 · PURCHASES ABROAD



NOW WHAT

Temu ships from China straight to Western consumers, $22.5 bn in the US, $6.3 bn in Germany. These purchases abroad pull demand and price expectations away from domestic brands. **Watch it as a pricing and attention threat, not a social channel to join.**

Notes: Temu country GMV, classified as purchases abroad. Temu is a cross-border marketplace, not counted as social commerce.

Sources: ECDB

The Social-First Funnel

On social, discovery and purchase live in the same feed. The funnel is shorter and runs on two engines: borrowed reach from creators, and owned trust from your storefront.

Discover	›	Engage	›	Checkout	›	Repeat
Creator content, short video, pins		Live, comments, saves, community		In-app shop or a fast handoff		Follow, re-engage, community

ENGINE 1 · CREATOR-LED

Borrowed trust and fast reach

Creators put the product in front of an audience that already trusts them.

ENGINE 2 · BRAND-OWNED STOREFRONT

Owned trust, data and margin

Your in-app shop turns the reach into repeat customers you keep.

SO WHAT

The social funnel compresses discover-to-buy into a single feed. The brands that win run **both engines** : creators to acquire reach and proof, the owned storefront to convert and retain.

Sources: ECDB

Creators or Your Own Storefront

The two engines, compared on what matters. Mint marks the stronger side for each, the brands that win use both, for different jobs.

Dimension	Creator commerce	Brand-owned storefront
Trust	**Borrowed from the creator**	Built by the brand
Reach	**Fast, the creator's audience**	Slower, your own followers
Cost	Pay per post or commission	**Fixed setup, lower per sale**
Customer data	Mostly the platform's	**More of it is yours**
Control	Low, the creator's voice	**Full**
Best for	Launches, reach, social proof	Retention, margin, repeat

NOW WHAT

Not either/or. Use creators to acquire reach, proof and launches; use the owned storefront to convert, keep margin and own the data. **Measure each on its own job, not on the other's.**

Sources: ECDB

What the Rules Allow

The EU Digital Markets Act puts extra rules on the largest platforms, called gatekeepers. It limits what those platforms can do, which changes what a brand should plan for.

WHO IS COVERED: TikTok · Gatekeeper | Instagram · Gatekeeper | Pinterest · Not covered

The rule on the platform	What it means for your brand
No self-preferencing A platform cannot rank its own shop above yours.	Your products compete on merit, not buried under the platform's own store.
No data merging without consent Platforms cannot freely combine your data across apps.	Cross-app targeting weakens over time, so your own first-party data matters more.
Data access and portability Platforms must let you reach and export your data.	You can take your customer and performance data with you. Less lock-in.

SO WHAT

The rules are steadily prying open platform lock-in. **Build on the customer relationship and first-party data you own** , not on targeting the platform controls, which is exactly where the rules are heading.

Notes: EU Digital Markets Act, European Commission designations as of 2026. Context for strategy, not legal advice.

Sources: ECDB

A Social-First Brand, Step by Step

An illustrative consumer brand is building a social-first commerce funnel. The brand is a composite; the platform data is real and modeled by ECDB. We answer the same five questions any brand should.

01

Where is our audience buying socially?

02

Which platforms own checkout?

03

Does our category sell on social?

04

Creators or our own storefront?

05

What funnel fits the brand?

THE KIND OF BRAND THIS COULD BE, ILLUSTRATIVE ONLY

Gymshark

e.l.f. Cosmetics

Daniel Wellington

Glossier

We are not analysing these specific brands; the example represents the kind of social-first brand they are.

Sources: ECDB

Finding the Audience and the Checkout

Steps 1 and 2: where the audience already buys socially, and which platforms actually close the sale.

STEP 1 · WHERE IS OUR AUDIENCE BUYING?

Already transacting on social at scale, and moving West.

TikTok Shop GMV by market, 2025

→ Start where the checkout is largest.

STEP 2 · WHICH PLATFORMS OWN CHECKOUT?

The jobs are different, sell where the sale closes.

TikTok Shop
Owns checkout, sell here

Instagram
Discovery, brand building

Pinterest
Discovery, high-intent demand

→ Sell where the checkout lives, get discovered where it does not.

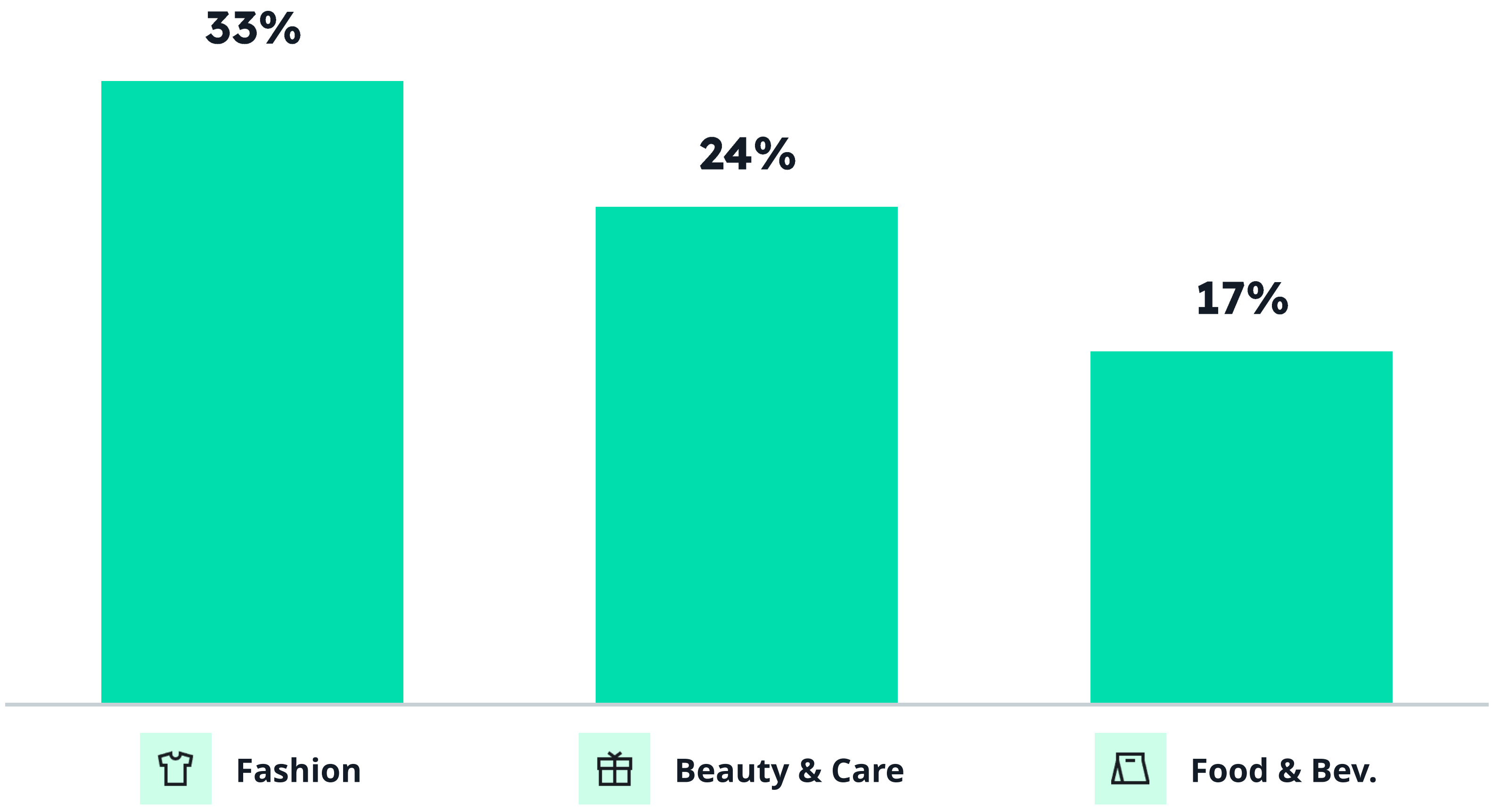
Sources: ECDB

Category Fit and the Two Engines

Steps 3 and 4: whether the category converts on social, and how to split creators and the owned storefront.

STEP 3 · DOES OUR CATEGORY SELL?

Fashion, beauty and food carry most GMV.



→ Our category, beauty and apparel, is exactly what converts. Lean in.

STEP 4 · CREATORS OR STOREFRONT?

Both, with different jobs.

Creators, to acquire
Reach, proof and launches on borrowed trust.

Own storefront, to keep
Margin, data and repeat customers you own.

The rules, to plan for
DMA data portability, build on first-party data.

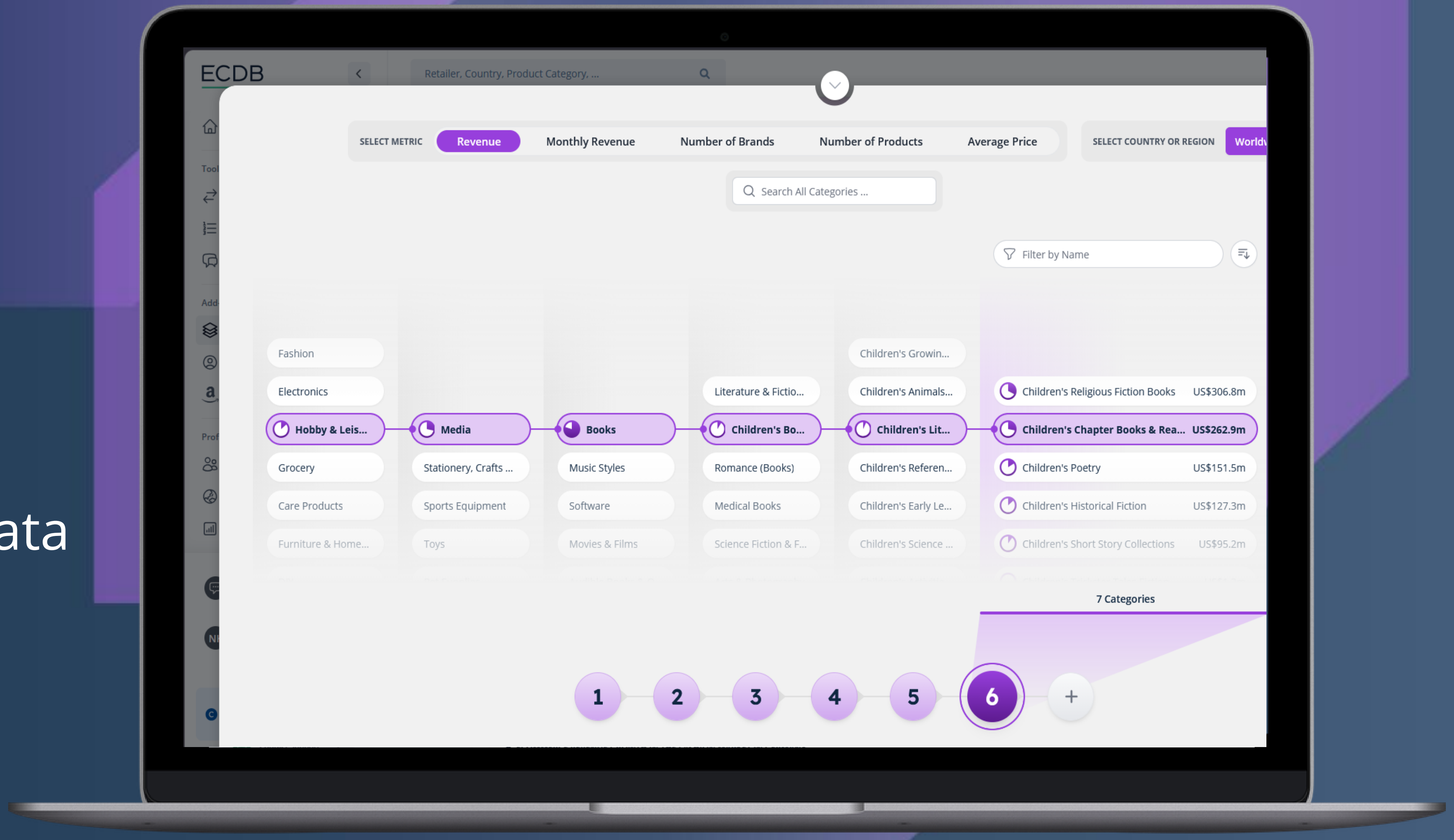
→ Creators to acquire, the storefront to retain, first-party data to build on.

Sources: ECDB

From Broad Segment to Micro Niche in Seconds

- Get a clear view of size, growth and trajectory for any market
- Reveal hidden demand pockets and overlooked market segments
- Back any product launch discussion, retailer pitch or budget review with data

Discover More



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The Social-First Funnel, Decided

Sell where checkout lives, get discovered where it does not, lean into the categories that convert, run creators for reach and the storefront for retention, and **build on data you own.**

NOW WHAT

Sell on TikTok Shop where the category converts, discover on Instagram and Pinterest, run creators to acquire and the storefront to retain, **own the data.**

Step 5 · What Funnel Fits the Brand

The decision, on data, social commerce is a place to sell, not only to advertise

Sell on platforms that own checkout, where GMV is real and our category converts.

Discover on Instagram and Pinterest, measured on assisted demand.

Run creators to acquire reach and proof, the owned storefront to convert and retain.

Build on first-party data the rules now protect.

Notes: Brand is illustrative; platform, regional and category figures are real ECDB modeled data.

Sources: ECDB

The Social Commerce Playbook

Five things to carry out of this report

01	**Treat it as proven, in Asia**	Two of the ten largest online retailers are Chinese social commerce. Proven there, arriving here.
02	**Follow the checkout, and the West**	TikTok Shop is exporting the China model, already $14bn in the US, fractions of that in Europe.
03	**Sell where your category converts**	Fashion, beauty and food carry most social GMV. Match the channel to the category.
04	**Run two engines**	Creators for reach and proof, the owned storefront for margin, data and retention.
05	**Build for data portability**	The DMA unwinds platform lock-in; own your data. Watch Temu on price.

Sources: ECDB

The ECDB Platform Behind This Report

Every figure here comes from ECDB, modeled data on tens of thousands of retailers and markets. The full toolset, mapped to the work in this report:

CORE INTELLIGENCE

Profiles	Analyze & Compare	Rankings	Competition	AI Assistant

ADD-ON TOOLS

Category Explorer	Amazon Analytics	Lead Finder

Sources: ECDB

METHODOLOGY

How the Data Is Built

ECDB combines several independent sources, with **real transaction data at the core** , into one consistent and comparable view, modeled and cross-validated by analysts.

That is what makes the figures defensible across every platform, market and category.

Where the Numbers Come From

Transaction signals at the core, cross-validated and modeled into comparable intelligence

01

Real Transaction Core

Built on real transaction signals, the strongest evidence of what was actually bought.

02

Multiple Independent Sources

Several independent inputs combined, so no single blind spot drives the result.

03

Analyst Modeled

Analysts apply proprietary models and AI to turn raw inputs into structured intelligence.

04

Consistent & Comparable

Cross-validated, so figures hold up and compare cleanly across platforms.

Read the Full Methodology

See the full coverage, sources and how every figure is modeled.

Discover More

Sources: ECDB