

■ RETAIL INTELLIGENCE BRIEFING

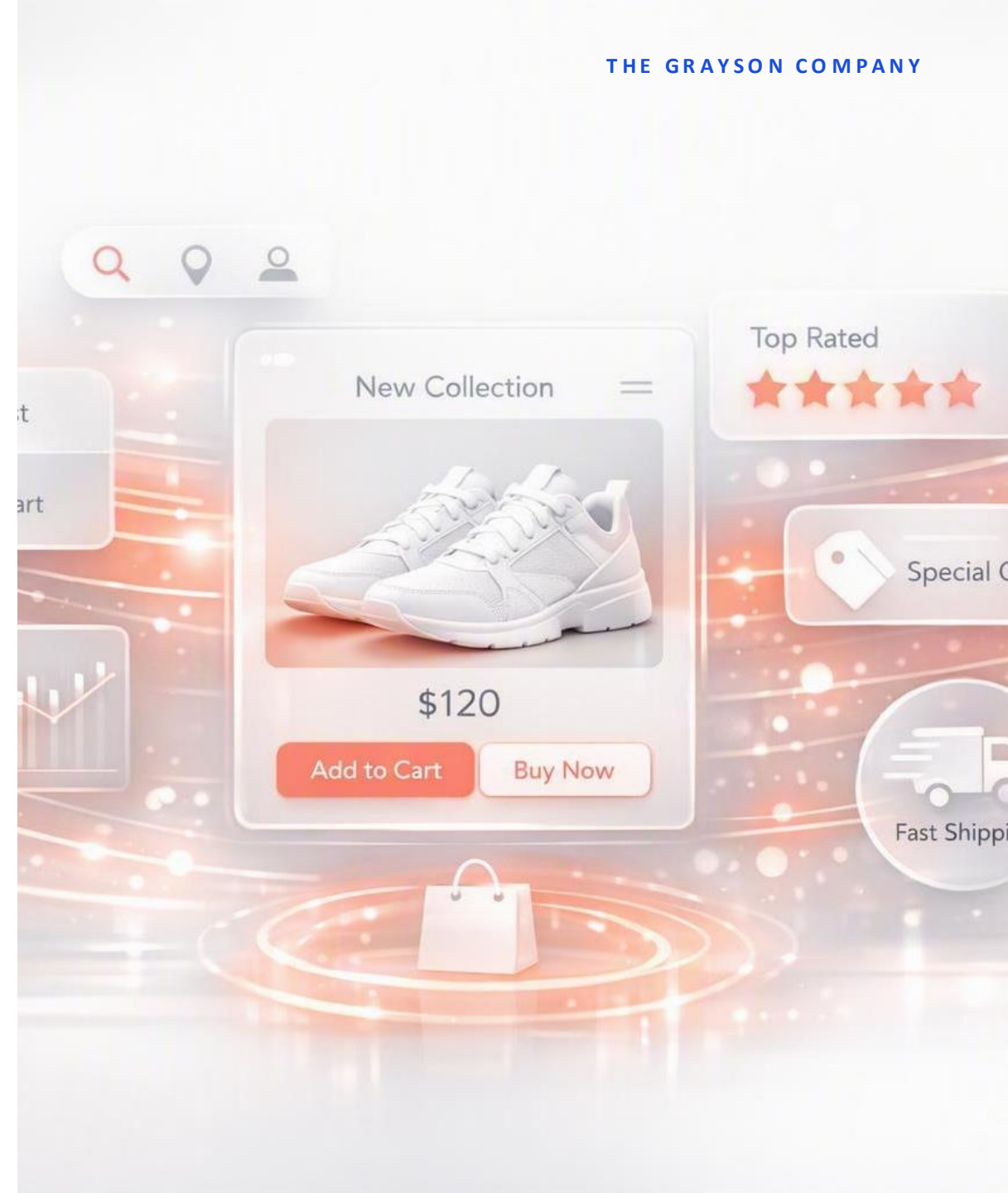
# AI Leaders in Retail

How the world's most innovative brands are transforming commerce

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*The New Retail Intelligence Race*

Executive Briefing • June 2026



# The New Retail Intelligence Race

Artificial intelligence has moved from experimental novelty to competitive necessity. While most retailers run basic chatbots, a select group of leaders has gone far further — **embedding predictive analytics, generative AI, autonomous agents, and computer vision across the entire business.**

*These companies aren't just improving customer interactions — they are redesigning merchandising, logistics, product development, and operational decision-making around intelligent systems.*



**\$14B →  
\$138B**

Global retail AI market, 2025–2035, growing 23%+ a year



**89%**

of retail & CPG firms now use or test AI — yet only ~7% have fully scaled it



**10–15%**

revenue uplift typical for leaders using AI-driven personalization

## WHO'S LEADING

# Three Fronts of the Retail AI Race

*Leadership is emerging across three distinct categories — each mastering a different layer of the AI-powered value chain.*



## E-Commerce Giants

**Building End-to-End AI Ecosystems**

Amazon · Walmart · Shopify

**KEY STRENGTH** Autonomous commerce at global scale



## Beauty & Fashion

**Masters of Hyper-Personalization**

Sephora · Stitch Fix · Nike · Zara

**KEY STRENGTH** Personalization & demand forecasting



## Big-Box & Specialty

**Optimizing Operations at Scale**

Best Buy · Home Depot · Lowe's ·  
IKEA

**KEY STRENGTH** Workflow & supply-chain automation

# 01

SECTION ONE

## E-Commerce Giants

*Building end-to-end AI ecosystems that span discovery, fulfillment, and the merchant economy.*

THE GRAYSON COMPANY



## E-COMMERCE GIANTS

# Amazon

## *Defining the frontier of retail AI innovation*

Amazon's Rufus AI shopping assistant helps customers discover products faster, driving significant incremental sales. Behind the scenes, predictive logistics models anticipate demand before purchases are made — enabling faster fulfillment and leaner inventory. In 2026 the company added “Buy for Me” and Auto Buy, pushing further into autonomous shopping.

**KEY STRENGTH** Predictive, end-to-end AI across the customer journey



RUFUS AI ASSISTANT BY THE NUMBERS

**~\$12B**

incremental annualized sales attributed to Rufus in 2025

**300M+**

users; Rufus shoppers convert ~60% higher than non-users

**+210%**

year-over-year growth in assistant interactions

## E-COMMERCE GIANTS

# Walmart

## *Conversational commerce at mass-market scale*

Walmart's AI assistant Sparky — built with OpenAI and Google Gemini technologies — can assemble complete shopping carts from a customer need or an event description. Advanced AI search replaces traditional keyword shopping with conversational discovery, meeting shoppers wherever they are.

**KEY STRENGTH** Cart-building AI that reaches a mass audience



SPARKY ASSISTANT BY THE  
NUMBERS

**~50%**

of Walmart app users had tried Sparky within months of launch

**Jun 2025**

rolled out across all shopping categories

**3 surfaces**

available in the Walmart app, ChatGPT, and Google Gemini

## E-COMMERCE GIANTS

# Shopify

*Pioneering the future of agentic commerce*

As the leading commerce-enablement platform, Shopify equips millions of merchants with AI tools that automate store optimization, improve product-data quality, and streamline checkout. Its infrastructure increasingly enables seamless transactions initiated by external AI agents — the foundation of agentic commerce.

**KEY STRENGTH** Autonomous commerce infrastructure at global scale



## AI-DRIVEN COMMERCE MOMENTUM

**8×**

year-over-year growth in AI-driven traffic to Shopify stores

**~13×**

growth in orders originating from AI-powered search

**~2×**

new buyers order via AI channels at twice the rate of others

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## SECTION TWO

# Beauty & Fashion Innovators

*Masters of hyper-personalization, blending computer vision, machine learning, and generative AI.*



## BEAUTY &amp; FASHION

# Sephora

*One of retail's most recognized AI success stories*

Through innovations such as Color iQ and BeautyGPT, Sephora fuses computer vision, machine learning, and generative AI to deliver deeply personalized beauty guidance. Customers receive precise skin-tone matching, customized routines, and tailored product suggestions — now extended into conversational shopping inside ChatGPT.

**KEY STRENGTH** Computer-vision personalization that members trust



PERSONALIZATION BY THE  
NUMBERS

**74M**

active Beauty Insider members tied to a single identity

**~30%**

reduction in returns from AR shade-matching

**+3× CTR**

and +11% add-to-cart lift from AI personalization

# Personalized Style & AI-Native Design

*Two complementary plays: tailoring the individual experience, and rebuilding product creation itself around AI.*



## Stitch Fix

*Human + machine, by design*

Few companies are as AI-native as Stitch Fix. Machine-learning models analyze preferences, purchase behavior, and feedback to generate personalized style picks — which human stylists then refine. A conversational Style Assistant now lives in the app.

- ▶ *15+ years of proprietary style data*



## Nike & Zara

*AI-accelerated product development*

Both brands use generative AI to speed collection design, surface emerging trends, and optimize inventory planning. Predictive systems align production with real-time demand — cutting waste while improving availability. Nike's engine can generate 1,000+ designs in minutes.

- ▶ *Generative design at production speed*

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## SECTION THREE

# Big-Box & Specialty Retailers

*Optimizing operations at scale — from intelligent service to autonomous supply chains.*

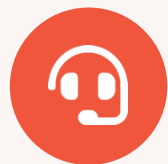
THE GRAYSON COMPANY



## BIG-BOX &amp; SPECIALTY

# AI Behind the Operations

*Leaders here apply AI less to the storefront and more to the machinery of retail — service, pricing, and logistics.*



## Best Buy

Intelligent diagnostic tools help customers troubleshoot devices, while AI workflows speed issue resolution. A Google Cloud-built assistant consolidated 93 contact-center apps into a single agentic experience.

► **Service & support automation**



## Home Depot & Lowe's

Lowe's MyLow advisor (built with OpenAI) guides complex projects across 1,700+ stores. Home Depot pairs visual AI with dynamic localized pricing to optimize recommendations and inventory.

► **Project guidance & smart pricing**



## IKEA

IKEA focuses AI on supply-chain transformation — partnering with autonomous-trucking innovator Waabi while automating planning, forecasting, and fulfillment across its network.

► **Autonomous logistics & forecasting**

**KEY STRENGTH** AI-powered workflow automation and supply-chain optimization

## WHAT COMES NEXT

# Five Trends Defining Retail AI



1

## From Search to Conversation

Keyword search gives way to AI that understands context, intent, and goals.



2

## Hyper-Personalization at Scale

Beyond demographics to individualized, real-time behavioral recommendations.



3

## Predictive Operations

Forecasting demand and optimizing inventory before challenges occur.



4

## Agentic Commerce

Autonomous agents act for shoppers and merchants, reshaping discovery.



5

## Computer Vision Integration

Visual AI powers recommendations, style matching, and store operations.

## ■ THE BOTTOM LINE

AI is no longer  
a side project —  
it's embedded across  
the value chain.

### ■ Intelligence everywhere

From customer engagement and product design to logistics and inventory.

### ■ Leaders pull ahead

Amazon, Walmart, Sephora, Shopify, Nike and peers integrate AI end to end.

### ■ Data becomes advantage

Predictive insight, automation efficiency, and personalization build lasting loyalty.

*Data into insight · automation into efficiency · personalization into lasting loyalty.*

