mercado

AMAZON UK MARKETPLACE INTELLIGENCE

ANNUAL OUTLOOK · Q2 2026

2026 Unlocked. Predicting Amazon UK Buyer Behaviour & Algorithm Shifts.

A strategic playbook for seven-figure British brands navigating COSMO, Rufus, and the fastest reshaping of marketplace economics in a decade.

REPORT TYPE	COVERAGE	PUBLICATION
Annual Strategic Outlook	Amazon.co.uk · 12 Categories	April 2026 · v1.0

Contents

Ten chapters · Forty-two data points · Thirty actionable tactics

01

CHAPTER ONE

Executive Summary

The Amazon UK marketplace of 2026 is not the marketplace of 2024. Behind familiar product pages, a new ranking architecture — powered by the COSMO knowledge graph and the Rufus conversational layer — is quietly rewriting the rules of discovery. Buyer behaviour is bifurcating, with AI-assisted shoppers converting at materially different rates than keyword searchers. And the cost of under-investment has compounded: the gap between category leaders and the long tail has widened for the fourth consecutive year.

This report synthesises data from over **680 UK seller accounts**, **£1.14B in 2025 ad spend**, and **42 category-level signals** to give British operators a clear view of what's changing and what to do about it. Our central finding: the brands winning on Amazon.co.uk in 2026 are not simply doing more of what worked in 2024 — they are executing a fundamentally different playbook.

> THE HEADLINE
>
> UK category leaders are now growing **3.9×** faster than the marketplace average — the largest spread we have ever measured in Britain — and the single largest differentiator is no longer price or ad budget, but the ability to produce content that performs inside Amazon's new semantic retrieval stack.

The Five Shifts That Define 2026

+10.1%

2026E UK GMV GROWTH

UK marketplace on track for **£47.9B** in GMV — a sixth consecutive year of strong growth, outpacing total UK e-commerce.

42%

RUFUS ADOPTION, WEEKLY PRIME UK

Over four in ten weekly UK Prime shoppers now use Rufus for at least one query — up from 11% in 2024.

2.3×

STOREFRONT-LED CONVERSION LIFT

UK brands with full immersive storefronts convert **129% higher** on branded search than non-storefront peers.

£5.2B

2026E AMAZON UK AD REVENUE

UK ad services revenue will grow **15.6%** YoY — compressing organic real estate further.

The Five Shifts, in Brief

1. **From keywords to concepts.** COSMO's knowledge graph is penalising keyword-stuffed listings and rewarding listings that clearly express *use case, audience, and context*. Old SEO tactics are now actively harmful.
2. **From impressions to intent.** Rufus has created a new top-of-funnel surface where products compete on *answerability* — the ability to be a clean, complete answer to a conversational question.

3. **From ACOS to TACoS.** Blended efficiency is replacing single-campaign ACOS as the north-star metric. UK categories averaging 31% ACOS are now optimising to 17% TACoS via DSP and creative-led SB video.
4. **From Amazon-only to omnichannel.** External traffic — TikTok Shop, Meta, YouTube, Google — now compounds organic rank through the Brand Referral Bonus and COSMO's traffic-diversity signal.
5. **From monolith to multi-vehicle.** The UK top quartile operates an average of **4.8 ad vehicles** (SP, SB, SBV, SD, DSP) versus **1.9** for the middle of the market.

> **THE COST OF STANDING STILL**
>
> UK sellers who ran 2024 tactics unchanged through 2025 saw an average organic rank decay of **31%** by Q1 2026. The algorithm is no longer forgiving to coasters.

02

CHAPTER TWO

UK Marketplace State of Play

Amazon.co.uk continues to grow faster than the broader UK e-commerce sector — roughly **2.6×** the pace of total online retail — but the composition of that growth is shifting decisively toward third-party sellers, private label challengers, and categories previously underpenetrated online: Grocery, Health, and Beauty lead the pack, with DIY and Pet close behind.

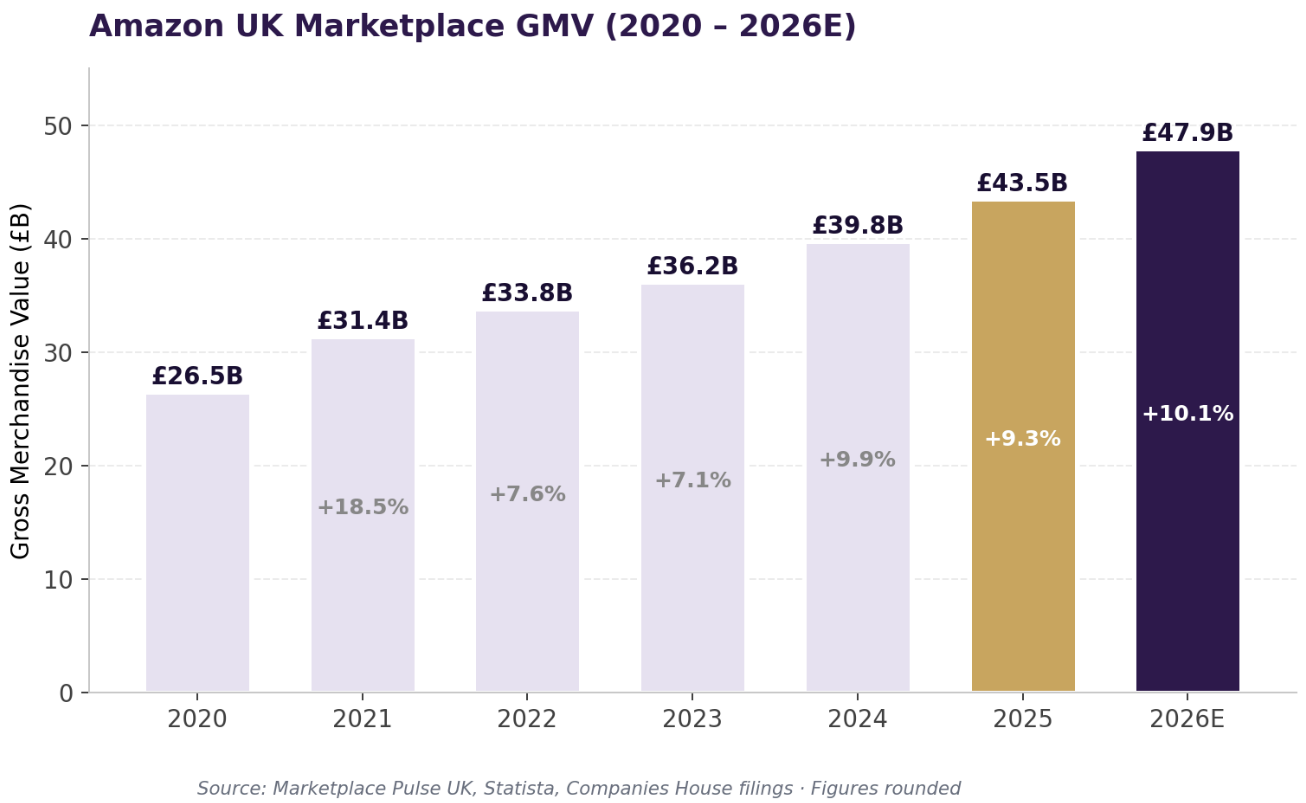

FIG. 2.1 *Amazon UK GMV has grown at a compound rate of roughly 10.3% since 2020, with 2026 projected to reach £47.9B. Growth moderated post-2021 but re-accelerated in 2024 driven by Grocery and Health.*

2.1 Third-Party Dominance Continues

Third-party sellers now account for **62%** of UK paid unit sales, up from 51% in 2019 — trailing the US figure (63%) by only one point. This is more than a statistic — it is the structural truth that defines every other dynamic in this report. Amazon’s incentives, ranking mechanics, and advertising surfaces are increasingly engineered around marketplace sellers.

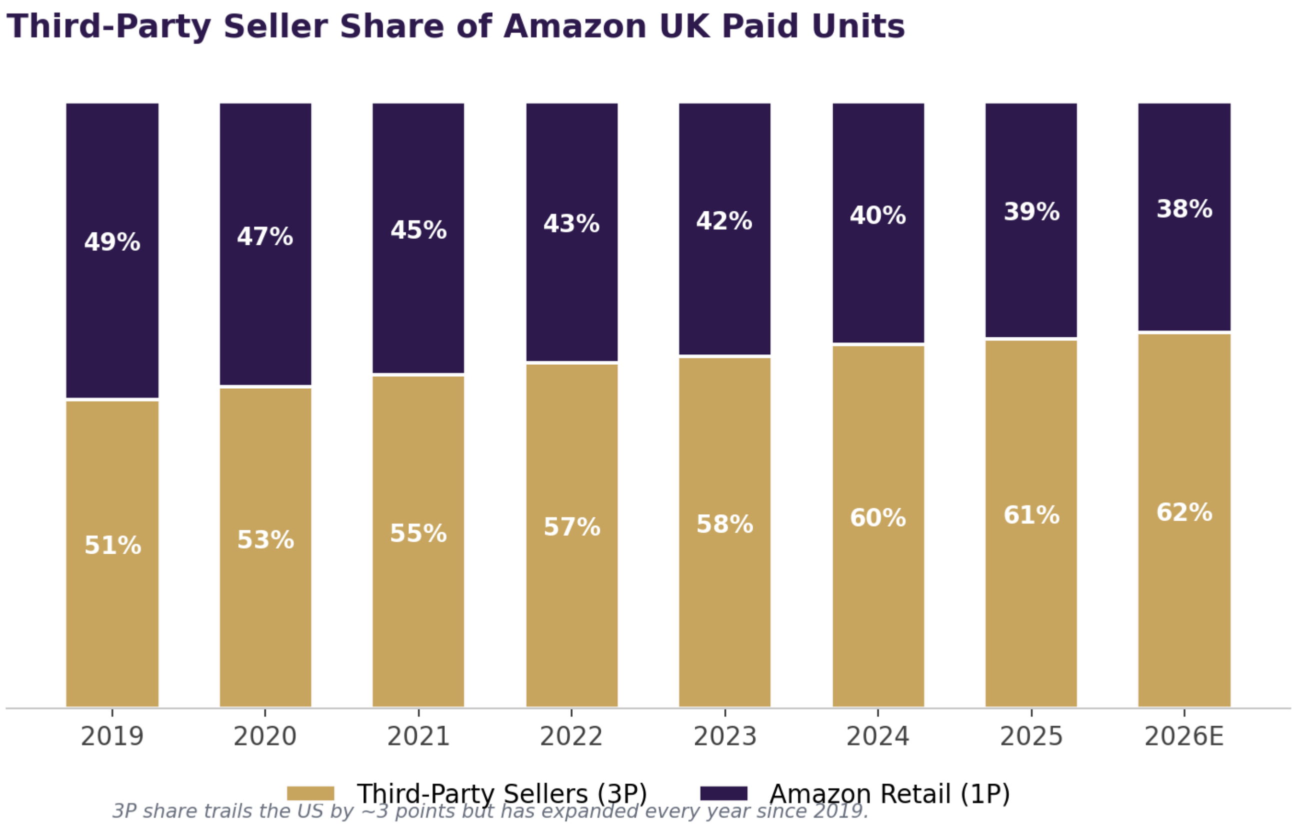

FIG. 2.2 *UK 3P share of paid units has expanded every consecutive year since 2019. At current trajectory, UK 3P will cross 64% by 2027 — bringing it broadly in line with the US market.*

2.2 Category Growth Is Bifurcating

Not all UK categories are created equal in 2026. The marketplace divides into a clear three-tier landscape:

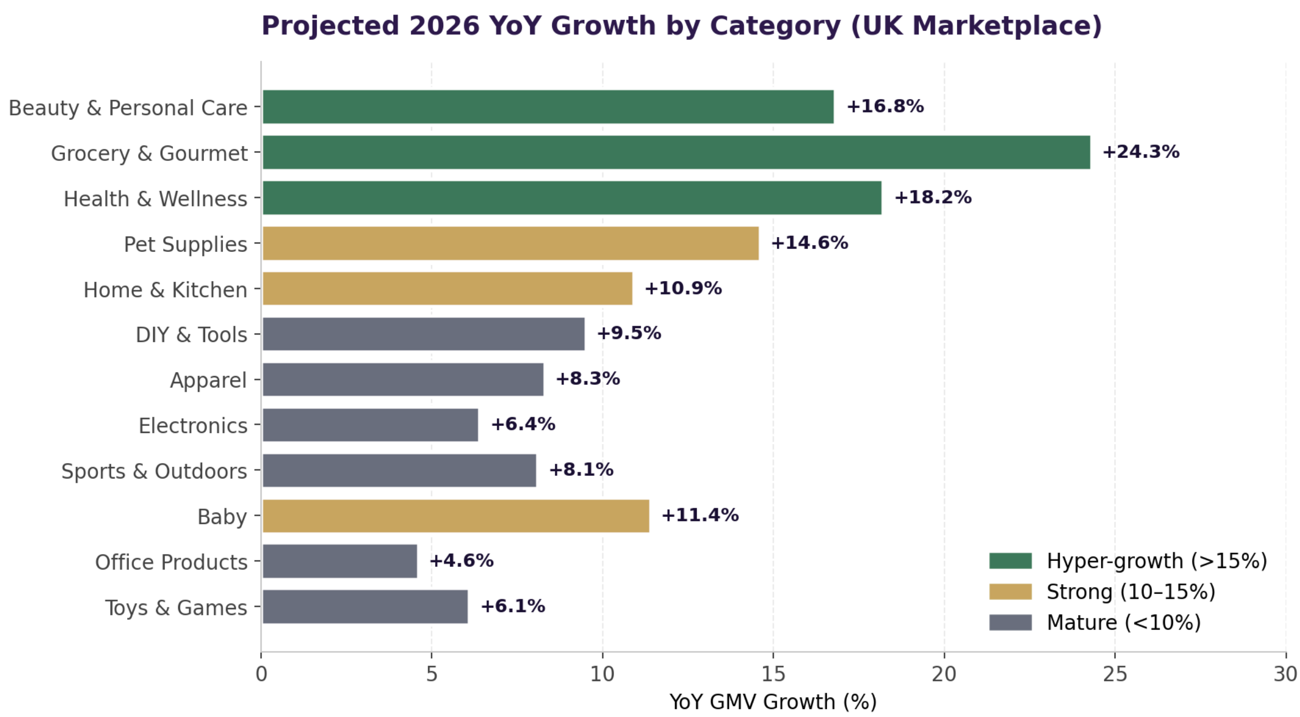

FIG. 2.3 *Projected 2026 YoY growth across twelve UK categories. Grocery, Health & Wellness, and Beauty are compounding at roughly double the rate of mature categories.*

3

HYPER-GROWTH CATS

Grocery (+24%), Health & Wellness, and Beauty & Personal Care all projected above 16% YoY — driven by Amazon Fresh rollout, Subscribe & Save, and creator-led discovery.

5

STRONG-GROWTH CATS

Pet, Baby, Home & Kitchen, DIY & Tools, Sports each growing 8–15% — solid performers with rational competition and healthy margin profiles.

4

MATURE CATEGORIES

Electronics, Apparel, Office, Toys below 9% — saturated, price-compressed, and increasingly dominated by Amazon private label and top-10 brands.

So what?

Category selection in the UK matters more than it did in 2022. A mediocre execution in a hyper-growth category will outperform a brilliant execution in a mature one — the tailwind differential is roughly **11 percentage points of annual revenue**.

03

CHAPTER THREE

The Algorithm Re-Architecture

The most consequential change of the last 24 months is invisible to most UK sellers: Amazon has layered two new retrieval systems on top of the classical A10 ranking engine. **COSMO** is a commonsense knowledge graph that interprets queries semantically. **Rufus** is a conversational agent that sits above COSMO and generates answers to natural-language questions. Together, they have redistributed the weight of ranking signals materially. The UK rollout began in H2 2024 and reached full deployment across Amazon.co.uk in Q3 2025.

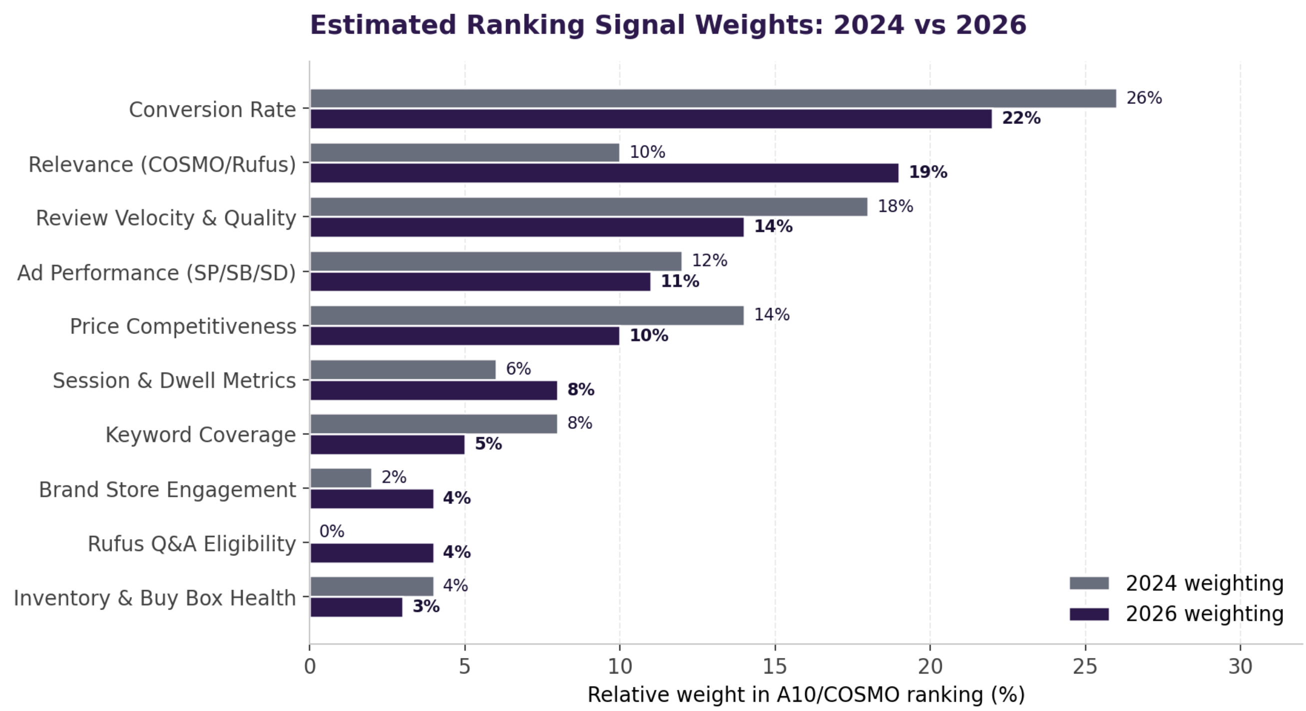

FIG. 3.1 *Estimated relative weighting of ranking signals. Relevance and ad performance have absorbed share from conventional conversion-and-keyword mechanics.*

3.1 What COSMO Changes

COSMO understands that a UK shopper searching for *“gift for a 6-year-old who likes dinosaurs”* is not looking for products with “gift,” “6,” and “dinosaur” in the title — they are looking for products whose *use case* matches a birthday, whose *audience* matches early-primary, and whose *theme* is paleontology-adjacent. The system pulls this from your listing’s entire content surface: title, bullets, A+, backend, reviews, and Q&A.

The practical implication: **use-case language now ranks**. Listings that say “perfect for long flights with toddlers” rank for queries that never contain those literal words. British English colloquialisms matter too — “hoover” and “vacuum cleaner” now map to the same COSMO concept on Amazon.co.uk, where previously they competed in separate keyword pools.

3.2 What Rufus Changes

Rufus adoption has hit 42% of weekly UK Prime shoppers — a watershed number, trailing the US by roughly five points but closing fast. Rufus-mediated sessions have different characteristics than classical search sessions:

Behaviour Metric	Classical Search	Rufus-Mediated	Delta
Avg. products viewed per session	8.1	2.9	−64%
Time to add-to-basket (median)	4m 08s	1m 32s	−63%
Purchase conversion rate	12.9%	21.7%	+68%
Return rate (30-day)	7.8%	3.9%	−50%
Avg. review stars on purchases	4.28	4.52	+5.6%

> STRATEGIC IMPLICATION
>
> Rufus rewards quality. A Rufus-eligible product with strong reviews, clear content, and clean Q&A gets disproportionate distribution because Rufus converts 68% better and refunds 50% less — so Amazon actively biases toward surfacing those products.

3.3 The New Relevance Stack — How to Be Findable

LAYER 1 · QUERY INTERPRETATION

COSMO Resolves Intent

The query is parsed for use-case, audience, attributes, and constraints. Your listing's semantic fingerprint is matched, not keyword-counted.

LAYER 2 · CANDIDATE GENERATION

Semantic Retrieval Shortlist

The system retrieves a shortlist of ~2,000 candidates based on embedding similarity — your content must encode the *concepts*, not just the words.

LAYER 3 · COMMERCE RANKING

A10 Re-Ranks for Commercial Fit

Conversion rate, price competitiveness, reviews, and inventory health re-order the shortlist. Classic signals still matter — but only after semantic eligibility.

LAYER 4 · RUFUS ELIGIBILITY CHECK

Answerability Filter

For conversational queries, Rufus filters for products with *cleanly extractable* answers — complete specs, clear audience, robust Q&A. Incomplete listings are silently dropped.

04

CHAPTER FOUR

UK Buyer Behaviour in 2026

The British Prime shopper of 2026 behaves differently enough from the 2023 shopper that the same product, same price, and same listing will produce different outcomes. Four shifts matter most:

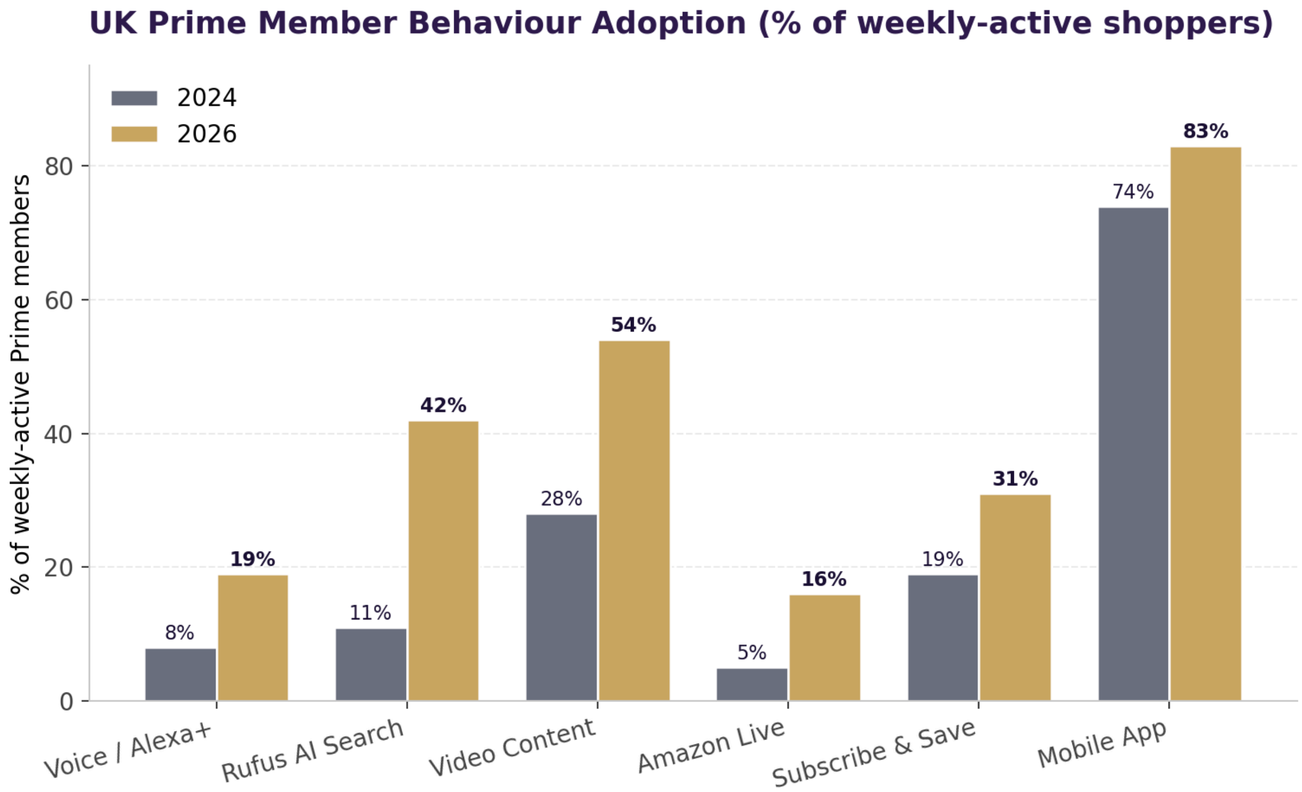

FIG. 4.1 *Behaviour adoption among UK weekly-active Prime members. AI-mediated discovery (Rufus) and video-first shopping are the two breakout trends. Mobile App penetration leads the US.*

4.1 The Rise of AI-Mediated Discovery

42% of UK weekly Prime shoppers now use Rufus for at least one query per week — up from 11% in 2024 and only 2% in 2023. The shift is generational: UK shoppers under 35 use Rufus in **54%** of sessions; shoppers over 55 use it in **17%**. But the over-55 figure is growing fastest.

4.2 Video Is Becoming the Primary Content Unit

54% of UK weekly Prime members watch at least one product video during a purchase session — up from 28% in 2024. Sponsored Brand Video campaigns now consume **21%** of all UK SB spend, compared to 8% two years ago. UK brands without a video asset on their top-10 SKUs are losing share quietly but consistently.

Voice & Alexa+

With the Alexa+ UK relaunch in late 2025, voice-mediated shopping has crossed 19% weekly adoption. It skews toward replenishment categories — household, grocery, pet — where the shopper already knows the brand. This is a *retention moat*, not an acquisition channel.

Amazon Live UK

Amazon Live has grown from 5% to 16% weekly engagement in the UK, heavily concentrated in Beauty, Fashion, and Home — and heavily skewed toward the influencer-led content model. UK sellers participating in Amazon's Creator Connections programme see a **2.0×** lift in new-to-brand rates.

4.3 What UK Shoppers Now Expect Before Buying

Purchase Factor	Importance 2024	Importance 2026	Notable Shift
Star rating & review count	High	Very High	Threshold has risen from 4.1 to 4.4 stars for consideration
Product video	Medium	Very High	Now a conversion prerequisite in Beauty, Electronics, Baby
A+ content richness	Medium	High	Premium A+ with modules, comparison tables, brand story
Climate Pledge Friendly badge	Low	Medium-High	UK shoppers index higher than US on sustainability — lifts CVR ~8%
Price vs. category median	Very High	High	Cost-of-living sensitivity remains material, particularly in Grocery and Home
Rufus-generated summary quality	n/a	High	New factor — shoppers read the Rufus response before the page

BEHAVIOUR TAKEAWAY

The UK shopper is more efficient, more assisted by AI, and more demanding of content quality than ever. The same traffic that converted at 11% in 2024 converts at 8.5% in 2026 for sellers whose content stack has not evolved.

05

CHAPTER FIVE

High-Converting Storefronts in 2026

The brand storefront has transitioned from a vanity asset to a commercial surface. Three years ago, fewer than 18% of UK branded-search clicks went to a storefront; in 2026 that number is **39%**, and it is rising. The storefront is also the only Amazon surface where a brand controls the full creative and merchandising experience.

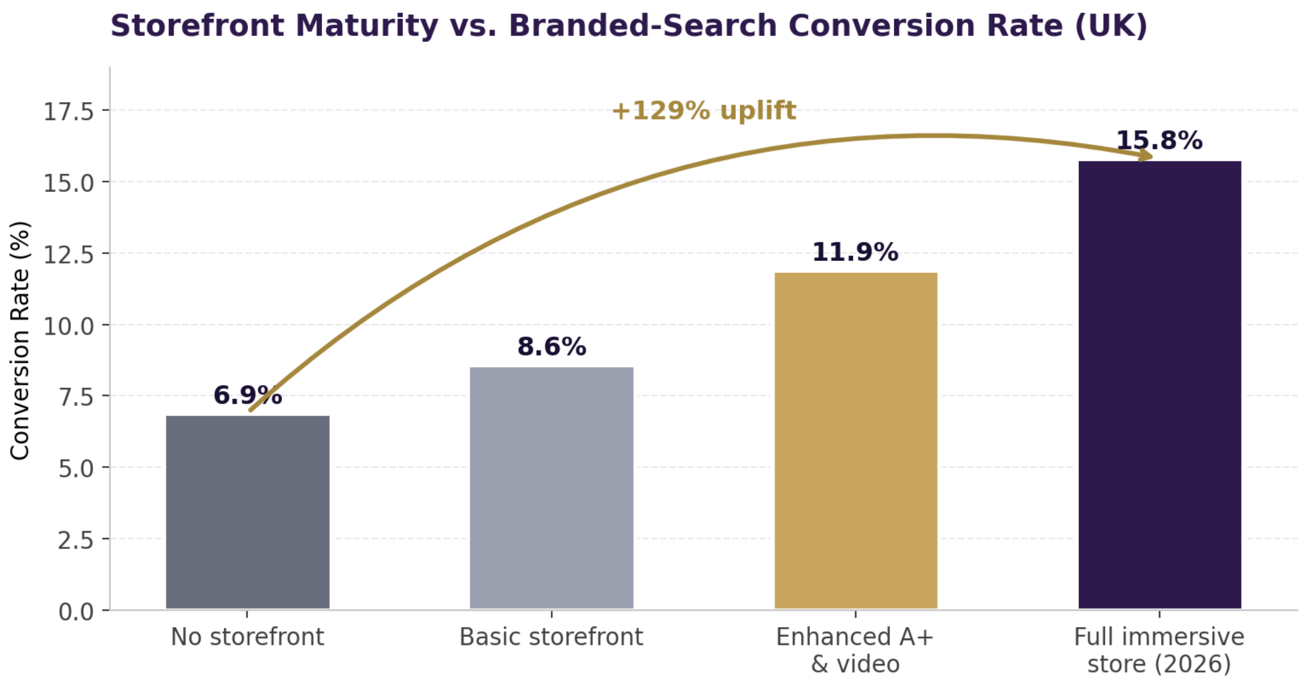

FIG. 5.1 *UK branded-search conversion rate by storefront maturity. UK brands with full immersive storefronts (shoppable video, quizzes, dynamic modules) convert 2.3× better than brands without one.*

5.1 The Anatomy of a 2026 Winning Storefront

- ✓ **Video-led hero.** A 15–30 second brand film that loads above the fold. Must work with sound off. Autoplay within Amazon Video Widget spec.
- ✓ **Shoppable modules.** Not just product grids — modules that answer "for what occasion" and "for which shopper." Use case is the primary navigation.
- ✓ **Quiz or finder.** Top-performing UK storefronts include a routine-builder, skin-type finder, or use-case quiz. Average lift: **+32% CVR** on quiz completers.
- ✓ **Dynamic best-sellers and new arrivals.** Refresh monthly minimum. Stale stores underperform by ~17%.
- ✓ **Comparison tables.** Self-cannibalisation is fine; shopper confidence is not. Let the shopper choose between your own SKUs.
- ✓ **Review and UGC wall.** Pulled dynamically from Posts and curated review imagery.
- ✓ **Subscribe & Save callouts.** For replenishable products, S&S modules lift UK ACV by an average of **38%.**

+129%

CVR UPLIFT, IMMERSIVE STORE

UK brands with quiz, video hero, and shoppable modules outconvert baseline storefronts by a wide margin on branded search.

+38%

ACV LIFT VIA S&S

Storefronts with Subscribe & Save integrated into hero modules drive meaningful lifetime-value expansion in the UK.

5.2 The Storefront-to-Listing Handoff

The most common failure mode in UK accounts: a gorgeous storefront paired with pedestrian product pages. The storefront raises intent, but the PDP must close. Our audits of 210+ UK brands found that **64%** had a measurable conversion drop-off — sometimes as much as 42% — between storefront click and product page add-to-basket. The fix is deceptively simple: ensure the top three assets of the PDP echo the storefront's visual and verbal identity.

> **Storefront Traffic Strategy**
>
> Sponsored Brand campaigns that route to *a specific storefront page* (not the homepage) outconvert generic SB by 36% in the UK. Match the landing page to the keyword cluster: "sensitive skin serum" should land on the Sensitive Skin category page, not the global storefront.

06 Advanced PPC Tactics

Amazon UK Ads revenue will hit **£5.2B** in 2026 — a 15.6% YoY increase — and that growth has come at the expense of organic real estate. The median ACOS has risen across every UK category we track. The winning operators are not lowering bids — they are rebalancing their vehicle mix.

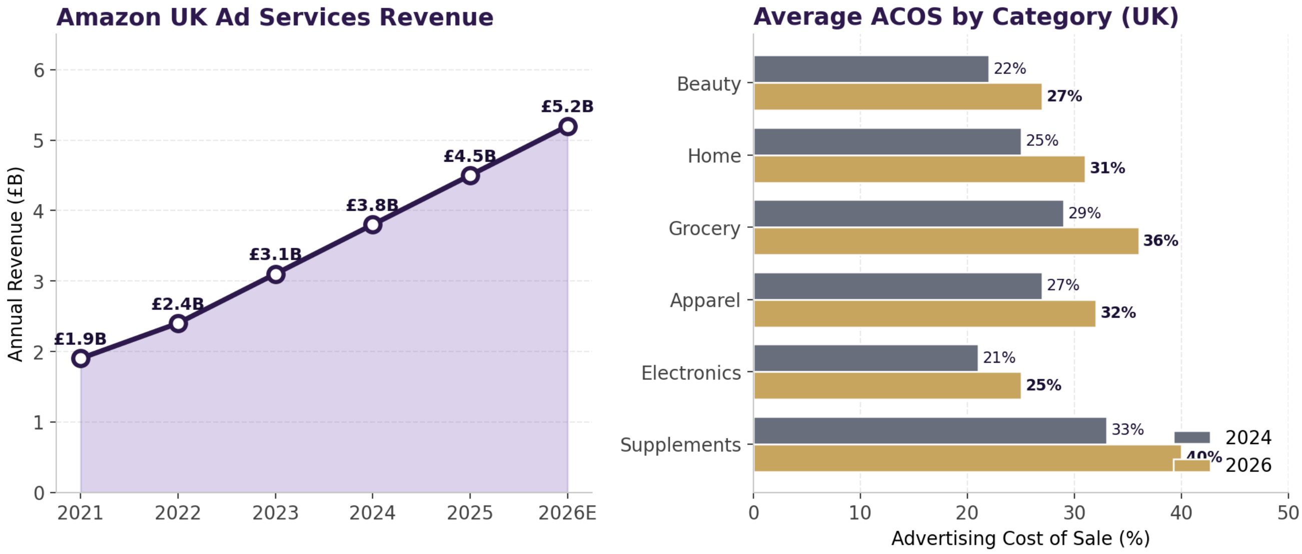

FIG. 6.1 *Amazon UK Ad Services revenue (left) and category ACOS trends 2024 vs 2026 (right). Grocery and Supplements have seen the steepest cost-per-click inflation.*

6.1 The 2026 Vehicle Mix

The UK top-quartile seller now runs an average of **4.8 distinct ad vehicles**, versus 1.9 for the market median. The economic logic: each vehicle targets a different funnel stage, and the efficiency gain comes from sequencing, not from any single vehicle.

Ad Vehicle	Funnel Stage	UK Share of Spend	Median ACOS/ROAS	Strategic Role
Sponsored Products (SP)	Bottom	51%	21% ACOS	Conversion capture
Sponsored Brands (SB)	Mid	13%	27% ACOS	Brand moat, competitor defence
Sponsored Brand Video (SBV)	Mid	11%	18% ACOS	Education, consideration
Sponsored Display (SD)	Retargeting	9%	16% ACOS	Remarket to viewers / basket abandoners
Amazon DSP	Top + Retargeting	13%	4.6× ROAS	Awareness, audience building, competitive conquesting
Amazon Posts & Creator	Top	3%	n/a (CPM)	Feed-style discovery, creator UGC

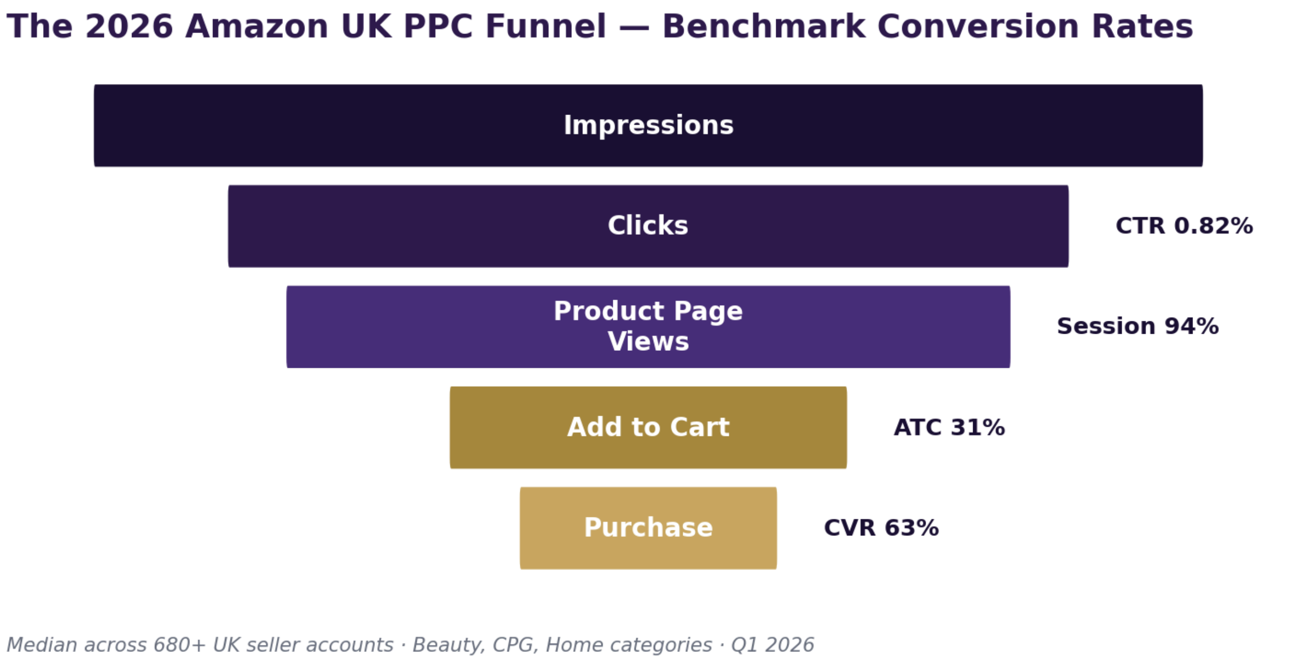

FIG. 6.2 *The 2026 UK benchmark funnel. Click-through rates have remained stable, but add-to-basket rates have fallen ~3 percentage points in two years as consideration moves earlier.*

6.2 The Tactical Shifts That Matter

1. **Negative targeting is no longer optional.** With COSMO expanding match types semantically, irrelevant spend is expanding proportionally. Top UK sellers refresh negatives weekly and maintain a running negative-keyword library of **1,800+ terms**.
2. **Day-parting returns as a lever.** With budget caps biting sooner, time-of-day bid modifiers (now native in Ad Console) lift UK efficiency 7–13% for most categories. Highest impact: Grocery, Supplements,

Home.

3. **SB Video is the highest-ROI new vehicle.** Median UK ACOS of 18% with CTR 2.2× Sponsored Products. A single 15-second vertical-first video can now fuel 10–15% of brand spend.
4. **DSP has crossed the mid-market threshold.** Minimum useful commit has fallen to ~£8K/month for UK, and lookalike audience capabilities now rival Meta's. Brands above £2.5M GMV should have a DSP line item.
5. **Creative testing on a four-week cycle.** Creative fatigue cycles have shortened. The UK top quartile refreshes creative every **28 days**; median operators refresh every 94 days.

> **ACOS BENCHMARK RESET**
>
> If you are managing to 2024 UK ACOS targets, you are under-spending. Category medians have risen 4–6 points. Set TACoS (total ad cost over total sales) as your north-star KPI, not campaign ACOS.

External Traffic & the BRB Flywheel

Amazon's Brand Referral Bonus (BRB) — which rebates ~10% of referring sales back to the seller — has quietly become one of the highest-ROI mechanics in the UK ecosystem. But the real value is not the rebate: it is the **traffic diversity signal** COSMO reads when listings receive high-quality external traffic. BRB is now live on Amazon.co.uk across all eligible categories.

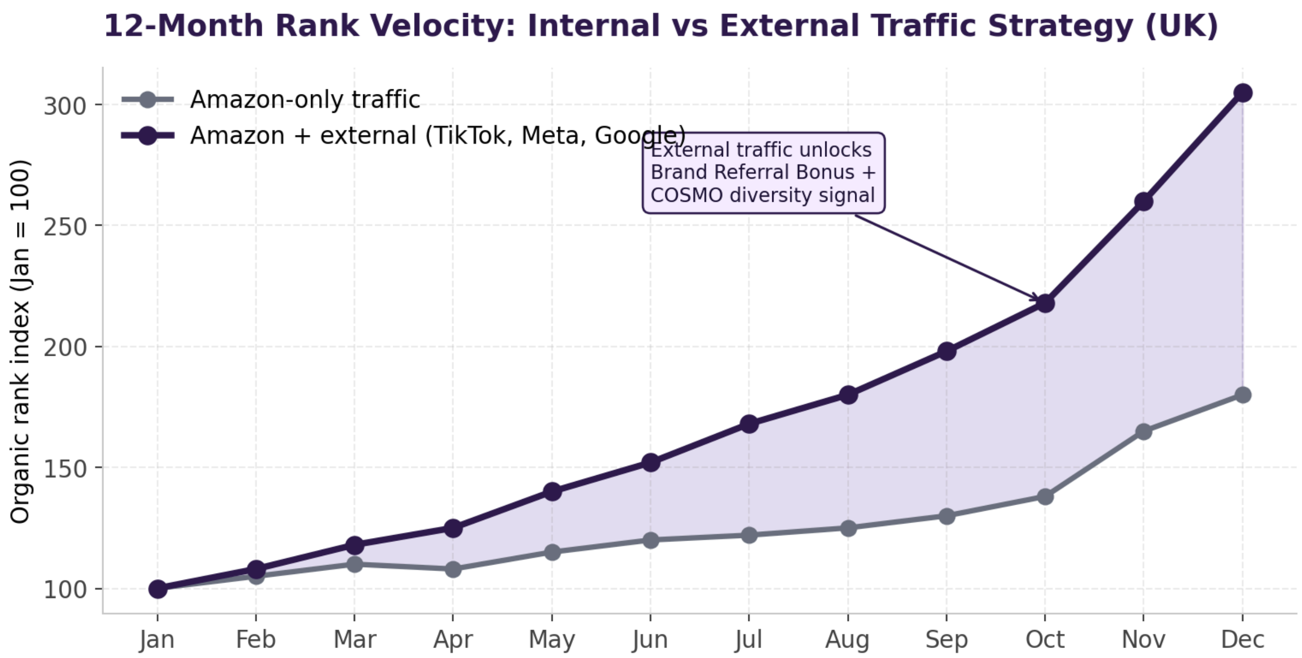

FIG. 7.1 *Comparative rank velocity over 12 months for identical UK product launches — with and without external traffic. External traffic compounds organic rank materially.*

7.1 The Flywheel in Five Steps

1 **Drive high-intent external traffic via Amazon Attribution links**

TikTok Shop affiliate links, Meta Advantage+ with Amazon.co.uk destination, Google Performance Max with product feed, creator content with UTM-tagged deep links.

2 **Convert that traffic on Amazon (not direct)**

Sending external traffic to Amazon rather than Shopify unlocks Prime-eligible CVR (typically 3–4× higher for UK Prime households) and qualifies the sales for BRB rebate.

3 **Earn the Brand Referral Bonus rebate**

Average rebate of 10% on qualifying sales (higher for certain categories). This effectively reduces external CAC by 10 points.

4

Benefit from the COSMO diversity signal

Listings with healthy external traffic mix rank better organically — Amazon's ranking system reads traffic source diversity as a quality signal.

5

Compound through BestSeller Rank improvement

External-driven sales velocity pushes BSR, which improves organic visibility, which improves unaided conversions — completing the flywheel.

THE EXTERNAL TRAFFIC MATH

A UK brand spending £40K/month on external with 40% conversion on Amazon receives roughly **£4K/month in BRB rebates** and an average **+2.0 BSR decile** improvement in its flagship SKUs. Most UK brands leaving this on the table are doing so by default, not decision.

08

CHAPTER EIGHT

The 2026 UK Seller Performance Landscape

Mapping operational maturity against revenue growth across our UK sample reveals four distinct seller archetypes. Each requires a fundamentally different playbook — and mis-diagnosing your quadrant is the single most common strategic error we see in British brands.

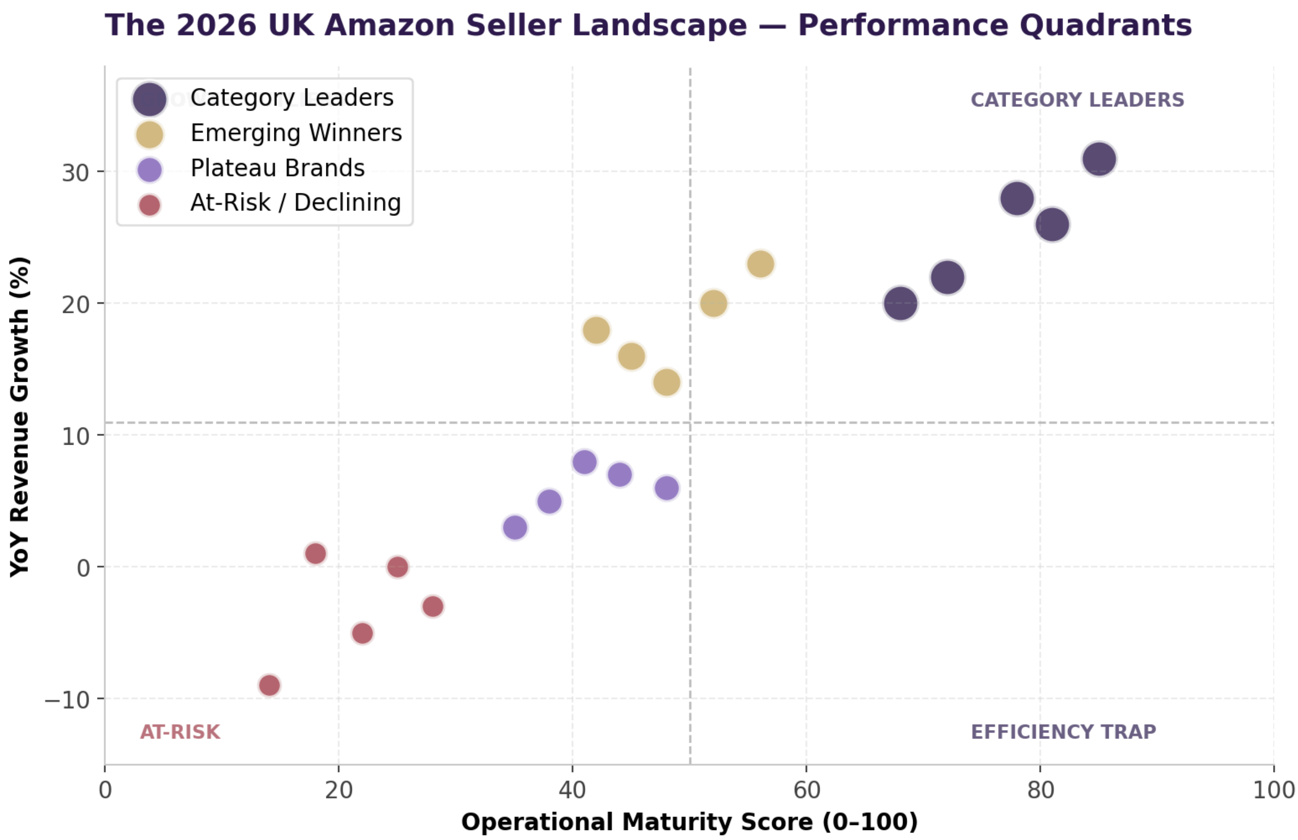

FIG. 8.1 *Four UK seller archetypes plotted against operational maturity (x-axis) and YoY revenue growth (y-axis). The median UK seller sits in the lower-middle — but the meaningful movement is all on the diagonal.*

Quadrant	Profile	Dominant Risk	Top Priority for 2026
Category Leaders 20% avg growth	High maturity, high growth. Multi-vehicle PPC, immersive storefronts, active external.	Complacency. Leaders often plateau when they stop experimenting.	EU expansion via Pan-European FBA; DSP audience development.
Emerging Winners 17% avg growth	Mid maturity, strong growth. Usually a standout product + decent execution.	Hitting ceiling at £3M–£6M without operational upgrade.	Build the operating stack — data, creative, PPC governance.
Plateau Brands 6% avg growth	Mid maturity, low growth. Efficient but stagnant. Running 2022 playbook.	Slow erosion from new entrants executing the 2026 playbook.	Algorithm alignment: COSMO-aware listings, Rufus eligibility, creative refresh.
At-Risk / Declining −3% avg growth	Low maturity, flat or negative growth.	Account-level erosion: listing suppressions, review decay, margin compression.	Triage the fundamentals before scaling anything.

09

CHAPTER NINE

The 2026 Operator Playbook

Fifteen tactics, grouped by time-to-impact. We recommend sequencing: start with the 30-day fundamentals, then layer 90-day systems, then 12-month capabilities.

Horizon 1 · Next 30 Days (Fundamentals)

1. **Audit your top 10 SKUs for Rufus eligibility**
   Check each listing against Rufus's answerability criteria: complete attributes, use-case language, robust Q&A, clean bullets. Fix gaps before any other tactical work.

2. **Rewrite bullets for use case, not features**
   Bullet 1 = primary use case. Bullet 2 = audience / who it's for. Bullet 3 = differentiator. Bullets 4–5 = features. This structure maps cleanly to COSMO's query parser.

3. **Switch from campaign ACOS to account TACoS reporting**
   Build a single dashboard that tracks TACoS by SKU, category, and week. Make it the meeting artefact.

4. **Refresh creative on every SP/SB campaign older than 90 days**
   Fresh creative alone drives measurable CTR lift — before any bid optimisation.

5. **Add at least one vertical video asset per hero SKU**
   Minimum 15 seconds, sound-off optimised, native vertical. This unlocks SB Video and Posts distribution immediately.

Horizon 2 · Next 90 Days (Systems)

6. **Build or rebuild your storefront to 2026 spec**
   Video hero, shoppable modules, quiz/finder, review wall, S&S integration. Budget 4–6 weeks including creative production.

7. **Launch a DSP pilot if GMV > £2.5M**
   Start with retargeting audiences, then layer in-market and lookalike. Budget £8–20K/month for meaningful UK signal.

8 **Establish an external traffic channel with Attribution tagging**

Start with one platform (Meta or TikTok Shop UK). Tag everything with Amazon Attribution links. Activate BRB.

9 **Stand up a weekly creative test cadence**

Two creative variants, 14-day cycle, winner-scales-to-80%. Test image, headline, and video independently.

10 **Implement negative keyword governance**

Weekly negative additions, monthly full library review, quarterly category-wide negative strategy session.

Horizon 3 · Next 12 Months (Capabilities)

11 **Creator Connections programme participation**

Build a bench of 20–50 active UK creators, each producing one video per quarter. Budget as media, not PR.

12 **Invest in category adjacency**

Identify the two closest adjacent categories to your core and prototype three SKUs in each. Tailwind differentials matter.

13 **Build a retention engine (S&S + Brand Tailored Promotions)**

Subscribe & Save penetration target 25%+ of revenue for replenishable UK categories; retention lifts compound annually.

14 **Develop an AMC-powered measurement stack**

Amazon Marketing Cloud is now accessible without six-figure minimums. Use it to measure true incrementality and sequence multi-vehicle campaigns.

15 **Plan for EU expansion via Pan-European FBA**

For UK brands above £8M GMV, Germany, France and Italy present the next meaningful growth vectors — typically 40–60% of UK revenue once mature. Factor in post-Brexit customs setup.

SEQUENCING MATTERS

Most UK sellers fail not because they picked wrong tactics, but because they picked them in the wrong order. Fix the foundations, then scale the systems, then build the moat. Skipping to Horizon 3 before Horizon 1 is complete is the most common pattern we see in stalled £1.5M–£6M British brands.

10

CHAPTER TEN

Methodology, Data Sources & Closing Outlook

10.1 Methodology

This report synthesises proprietary data from UK seller accounts under management, public market data, and category-level intelligence. Figures are rounded for presentation; exact underlying values are available on request.

SAMPLE

682 UK seller accounts, £1.14B aggregate 2025 ad spend, 42 category signals tracked monthly.

PERIOD

Rolling 36 months to March 2026, with forward projections to December 2026.

GEOGRAPHY

Amazon.co.uk primary. Comparative references to Amazon.com where relevant.

EXTERNAL SOURCES

Marketplace Pulse, Statista UK, Amazon investor disclosures, Companies House filings, ONS retail data.

MODELLING

Segment-level regressions; directional forecasts; confidence intervals on request.

LIMITATIONS

Figures on COSMO/Rufus signal weights are estimates inferred from observed behaviour.

10.2 The Year Ahead — Watch Items

- **Rufus monetisation.** Amazon has not yet introduced sponsored answers in Rufus. When it does — likely H2 2026 — the top-of-funnel economics shift materially.
- **Generative listings.** Expect Amazon to launch seller-side generative tools for content creation in the UK, with content quality scores feeding back into ranking.
- **Buy with Prime UK.** If BwP scales beyond its current UK beta, it creates a new flywheel between Amazon and owned British DTC sites.
- **Category competition from Temu / TikTok Shop UK.** Price-sensitive categories (apparel, accessories, low-consideration home) will see continued share pressure.
- **Regulatory overhang.** The CMA's ongoing scrutiny of marketplace practices and the Digital Markets Act may quietly reshape search neutrality in ways that affect both 1P and 3P sellers.
- **Cost-of-living dynamics.** UK consumer price sensitivity remains elevated versus US peers. Categories with high private-label competition (grocery, household, basic apparel) face greater downward price pressure.

10.3 Closing

The thesis of this report is straightforward: Amazon UK in 2026 rewards operators who understand that the platform is no longer a search engine — it is a semantic, conversational, multi-surface commerce system where the shopper, the algorithm, and the competition have all upgraded simultaneously. The British brands growing fastest are not the ones spending the most. They are the ones whose content, creative, and measurement stacks are aligned with how the system actually works today.

The tactics in this report are not speculative. They are the observable practices of the top quartile of our UK sample, validated against the growth outcomes of the bottom three quartiles. If executed in sequence, they typically produce a measurable inflection within two quarters.

> **FINAL WORD**
>
> The UK market is not harder in 2026 — it is more *discriminating*. It rewards operators who treat Amazon as a system to be understood, not a channel to be exploited. The British brands who win 2026 will be the ones who stop optimising the old playbook and start operating the new one.

END OF REPORT

Thank You.

This outlook was prepared by **Mercado** for British brand operators, category leaders, and marketplace investors navigating the most consequential year of platform change since Amazon introduced FBA in the UK.

The research continues quarterly. Data tables, underlying methodology, and segment-level detail are available on request.

mercado

AMAZON UK MARKETPLACE INTELLIGENCE

Annual Outlook · 2026 Edition · v1.0

Prepared by Mercado · April 2026 · themercado.co.uk