

Light Version

European B2C E-commerce Report 2016

Facts, Figures, Infographic & Trends of 2015 and the 2016 Forecast
of the European B2C E-commerce Market of Goods and Services



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European B2C E-commerce Report 2016

Colophon

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Ecommerce Europe Association Data at a Glance 2015



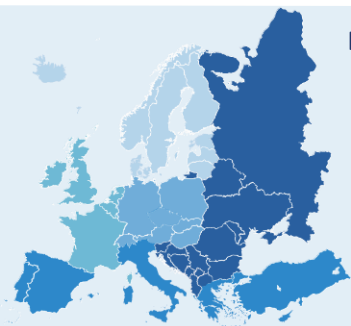
685mn people are over the age of 15



516mn people use the Internet (75%)



296mn people are e-shoppers (43%)



B2C E-commerce Turnover per Region

West	€252.9bn +12.9%
Central	€89.5bn +14.2%
South	€50.9bn +17.1%
North	€37.6bn +10.9%
East	€24.5bn +9.1%

GOMSEC

Global
Online
Measurement
Standard B2C
E-Commerce

Main Policy Areas

1. Internet Security & Privacy
2. Consumer Rights
3. e-Payments
4. Tax Issues
5. Competition
6. e-Logistics



B2C E-commerce Turnover Europe and EU28

Europe	€455.3bn +13.3%
EU28	€407.4bn +13.4%



2,500,000+

Estimated number of jobs created directly or indirectly via e-commerce



750,000+

Estimated number of online businesses



4.2bn+

Estimated number of parcels sent annually



35+ Company Members



35+ Business Partners



e-commercesummit.com



18+ Leading E-commerce Associations



Ecommerce Europe Trustmark



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European B2C E-commerce Report 2016

Preface

Ecommerce Europe

Stimulating cross-border e-commerce is Ecommerce Europe's mission, and therefore we are happy to know that the digital sector is booming. Online retail continues to grow significantly. The European e-commerce turnover managed to increase **13.3%** to **€455.3** billion in 2015. Compared to the **1.0%** growth of general retail in Europe, we can safely state that online trading is here to stay.

However, the full potential of the European e-commerce market has not been reached yet. We want to work together with all European stakeholders to rapidly remove remaining barriers in the cross-border online sales market, and we do so by providing policy and market solutions which are evidence-based.

The recently founded Ecommerce Foundation is supported by more than 20 national associations and forms a solid research center that provides a strong evidence basis for our activities. For instance, Ecommerce Europe has commissioned the Ecommerce Foundation to develop reports, which aid us with reliable e-commerce facts, figures and trends. This European B2C E-commerce Report offers deep insight into European e-commerce markets and contains valuable information for both EU legislators and companies that want to start cross-border trading in Europe.

All of our members and partners receive the Ecommerce Foundation's research reports for free. If you would like to receive additional information, purchase reports or become involved with Ecommerce Europe, please visit us at www.ecommerce-europe.eu or send us an e-mail at info@ecommerce-europe.eu.

Secretary-General of Ecommerce Europe

Marlene ten Ham



President of Ecommerce Europe

François Momboisse



Director of Ecommerce Foundation

Jorij Abraham



Researcher E-commerce

Roald Willemsen



Ecommerce Foundation

At the Ecommerce Foundation, we believe that sharing knowledge is essential for the continuous growth of the e-commerce industry. For this reason we have recently developed two initiatives with the aim of helping e-commerce companies improve. The EcommerceWiki is an international platform on which we strive to gather as much relevant e-commerce content as possible, with the help of many experts worldwide. In addition, we have set up the Ecommerce Benchmark, a useful tool for companies to compare their e-commerce performance with their direct competitors in a safe and anonymous way.

Through this report we want to share our knowledge on European B2C e-commerce. We have gathered these facts, figures and insights through thorough desk research and with the help of various association partners in the specific countries. This results in an elaborate report which will definitely offer valuable information to parties that trade cross-border in Europe or have intentions to do so.

Naturally, we could not have realized these reports without the help of others. Therefore we want to use this opportunity to express our gratitude to Asendia, Ingenico and Webhelp, who have enabled us to make our reports widely available, and to GfK for their close cooperation and involvement.

For any additional information about the Ecommerce Foundation and its products, please contact us through our website www.ecommercefoundation.org or send us an email at info@ecommercefoundation.org.

Our Report Partners

This report is created with help from the following partners

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The Ecommerce Foundation is a non-profit organization founded by Ecommerce Europe. It conducts research and studies in the field of e-commerce and provides for benchmarking and reports on e-commerce facts and figures. It also serves as Ecommerce Europe's research institute. In this role, the Ecommerce Foundation was commissioned by Ecommerce Europe to develop the European B2C E-commerce Report and more than forty national e-commerce reports.

Commissioned by:



Ecommerce Europe is the association representing 25,000+ companies selling goods and/or services online to consumers in Europe. Founded by leading national e-commerce associations, Ecommerce Europe is the voice of the e-commerce sector in Europe. Its mission is to stimulate cross-border e-commerce through lobbying for better or desired policy, by offering a European platform bringing the European e-commerce sector and other stakeholders together, and by providing in-depth research data about European markets.

In cooperation with:



GfK is the trusted source of relevant market and consumer information that enables its clients to make smarter decisions. More than 13,000 market research experts combine their passion with GfK's 80 years of data science experience. By using innovative technologies and data sciences, GfK turns big data into smart data, enabling its clients to improve their competitive edge and enrich consumers' experiences and choices.

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Asendia is one of the world's top three international mail, shipping and distribution organizations, delivering your packages, parcels and documents to more than 200 destinations across the globe.

Formed as a partnership between La Poste and Swiss Post in 2012, the Asendia business employs more than 1,000 people worldwide, has offices in 15 countries and a global network of delivery partners to get your package where it needs to be, when it needs to get there.

Our Report Partners

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Manhattan Associates, Inc. makes commerce-ready supply chains that bring all points of commerce together so you're ready to sell and ready to execute. Across the store, through your network or from your fulfilment centre, we design, build and deliver market-leading solutions that support both top-line growth and bottom-line profitability. By converging front-end sales with back-end supply chain execution, our software, platform technology and unmatched experience help our customers get commerce ready—and ready to reap the rewards of the omni-channel marketplace.



Ingenico is the most knowledgeable global Payment Service Provider in the world, processing international e-commerce payments for more than 600 of the world's most recognized e-commerce brands in the digital goods and services, travel, retail and video gaming industries, among many others. Ingenico's business intelligence tools, Managed Fraud Services and more than 400 payments experts help our clients elevate their payment strategies to become a strategic asset to their companies.



Webhelp is a global business process outsourcer (BPO), specializing in customer experience and payment management in addition to sales and marketing services across voice, social and digital channels. From 21 countries with a 30,000-strong team, our focus is on engineering performance improvements and delivering a real and lasting transformation in our clients' operating models to generate financial advantage. We partner with some of the world's most progressive brands.

A Brief Introduction to Europe

An Overview of Europe and the European Union



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European policy for cross-border e-commerce

E-commerce top priority in Brussels

E-commerce top priority for European policymakers

Digital changes the way consumers shop and the way consumers wish to receive their purchases. Nearly all growth in retail comes from e-commerce. The e-commerce sector is booming. However the full potential of the European e-commerce market has not yet been reached. Today, 57% of European Internet users shop online, but only 16% of SMEs sell online – and less than half of those sell online across borders (7.5%).

The European Commission of President Jean-Claude Juncker has the objective of creating a Digital Single Market, where the free movement of goods, persons, services and capital is ensured, and where citizens and businesses can seamlessly and fairly access online goods and services: whatever their nationality, and wherever they live. In particular, the European Commission has committed in its Digital Single Market Strategy to:

- rapidly conclude negotiations on common EU data protection rules;
- simplify consumer rules for online purchases;
- make it easier for innovators to start their own company;
- boost digital skills and learning.

The Commission launched its first legislative proposals for modern digital contract rules for the distance sales of goods and the supply of digital content in December 2015. The Commission is expected to publish new proposals on geo-blocking, parcel delivery and VAT by the end of this year and many more initiatives will be presented in the coming years.

Ecommerce Europe's key policy areas

Ecommerce Europe has defined key policy areas in which the association works together with the European Commission and other stakeholders to come to policy and market solutions for unlocking the potential of cross-border e-commerce in Europe. Ecommerce Europe believes that many obstacles for cross-border online trade still remain within the following key policy areas:

- Internet Security & Data Protection
 - *Harmonizing data protection, privacy rules with room for innovation*
- Consumer Policies
 - *Harmonizing and simplifying rules, same rules for online/offline sales*
- e-Logistics
 - *More efficient cross-border parcel delivery*
- e-Payments
 - *More focus on mobile and stimulating innovation*
- Taxation and VAT
 - *Harmonizing VAT, simplifying rules and reducing VAT-related costs*
- Competition
 - *Stimulating innovation and the entry of new players into the market*

Shaping better e-commerce policy in Europe

Since almost 80% of national legislations come from Brussels, Ecommerce Europe is at the front line to help and support the European Institutions in shaping the balanced EU legislation that has a direct impact on e-commerce businesses in the Member States. Founded by leading national e-commerce associations, Ecommerce Europe is the voice of the e-commerce sector in Europe.

Breaking down barriers to cross-border e-commerce

A brief introduction to Europe

Cross-border E-commerce Barometer 2016

According to the results of the Ecommerce Europe's Cross-border E-commerce Barometer 2016, online shops selling abroad in Europe still experience concrete barriers to cross-border e-commerce. In particular, these concern differing legal frameworks in EU, complicated taxation systems (VAT) and logistics- and parcel delivery-related issues.

Breaking down barriers

Ecommerce Europe's mission is to stimulate cross-border e-commerce through lobbying for better or desired policy, by offering a European platform bringing the European e-commerce sector and other stakeholders together. In addition, it does so by providing in-depth research data about European markets and by putting the e-commerce sector's demands on the agenda of those designing the necessary standards and regulations. Moreover, Ecommerce Europe provides more than 10,000 certified online companies across Europe with a European Trustmark label, with the aim of increasing consumers' trust in cross-border purchases.

Policy actions needed

Ecommerce Europe wants to work together with all European stakeholders to rapidly remove remaining barriers in cross-border e-commerce. For policymakers this entails supporting market initiatives, abolishing superfluous regulations and only considering new regulatory structures if absolutely necessary. Also, any new legislative initiative should always be evidence-based, especially in the context of the ongoing discussions on the role of

online platforms and geo-blocking. Fundamental business freedoms – especially the freedom to provide goods and services throughout the European Union – should also apply in the digital world.

Reliable facts & figures

The recently founded Ecommerce Foundation is supported by more than 20 national e-commerce associations and forms a solid research center that provides a strong evidence basis for our activities. The Ecommerce Foundation's reports aid us with reliable e-commerce facts, figures and trends. This European B2C E-commerce Report offers deep insight into European e-commerce markets and contains valuable information for both EU legislators and companies that want to start cross-border trading in Europe.

How to get involved

All of our members and partners receive the Ecommerce Europe research reports for free. If you would like to receive additional information, purchase reports or become involved with Ecommerce Europe, please visit us at www.ecommerce-europe.eu or send us an e-mail at info@ecommerce-europe.eu.



Marlene ten Ham
Secretary General of Ecommerce Europe

European Cross-Border E-commerce Figures

A Brief Introduction to Europe

CROSS-BORDER B2C PURCHASES IN THE EU

Percentage of cross-border B2C purchases in EU28 + Iceland and Norway, 2013 - 2015

Country	2013	2014	2015
EU28	12%	15%	16%
Austria	39%	40%	44%
Belgium	28%	34%	35%
Bulgaria	6%	7%	7%
Croatia	7%	8%	10%
Cyprus	21%	24%	20%
Czechia	7%	7%	9%
Denmark	32%	36%	35%
Estonia	13%	22%	26%
Finland	32%	36%	38%
France	18%	21%	21%
Germany	11%	12%	13%
Greece	9%	10%	10%
Hungary	6%	8%	11%
Iceland	24%	31%	Unknown
Ireland	24%	28%	30%

Source: Eurostat, 2016

Country	2013	2014	2015
EU28	12%	15%	16%
Italy	7%	9%	11%
Latvia	15%	16%	19%
Lithuania	10%	11%	11%
Luxembourg	64%	65%	68%
Malta	39%	39%	44%
Netherlands	15%	21%	21%
Norway	27%	33%	32%
Poland	3%	4%	4%
Portugal	11%	12%	16%
Romania	1%	1%	2%
Slovakia	17%	20%	20%
Slovenia	15%	17%	17%
Spain	12%	15%	18%
Sweden	23%	22%	25%
United Kingdom	14%	18%	20%

Cross-border B2C E-commerce

According to the latest figures of Eurostat (December 2015), the growing share of cross-border online purchases is an important indicator to judge how smoothly the **Single European Market (SEM)** for e-commerce functions.

Overall growth

In 2015, **16%** of all individuals in the EU28 purchased goods and/or services through the Internet from sellers **outside their country of residence**, but within the EU28. This is an increase of **33%** compared to 2013. Popular reasons for shopping abroad were a **more competitive price** and a **wider offer of goods and services available**.

Ecommerce Europe Trustmark

Boosting consumer trust across Europe



The full potential of the European e-commerce market has not yet been reached. Today, 57% of European Internet users shop online, but only 16% of SMEs sell online – and less than half of those sell online across borders (7.5%). Also, only 16% of consumers shop online from another EU country. Ecommerce Europe believes that a pan-European Trustmark scheme is a powerful tool to stimulate trust in online cross-border transactions.

A non-profit industry-led initiative

The Ecommerce Europe Trustmark is non-profit and based upon self-regulation, and has been developed in close cooperation with national consumer organizations. Over 10,000 certified online shops in 11 countries can join the Ecommerce Europe Trustmark for free. The objective of the Ecommerce Europe Trustmark is to stimulate cross-border online sales through better protection for consumers and merchants, by establishing one European set of rules and by ensuring clear communication on these rules. The Ecommerce Europe Trustmark is the only pan-European trustmark with its own consumer-friendly complaints-handling system that is free for members of participating national associations.

Transparency before, during and after the sale

The Ecommerce Europe Trustmark has a clear and recognizable label. By clicking on it, the consumer will be led to the Code of Conduct, a clear explanation of his or her rights, and the commitments of the merchant. The Code of Conduct includes the commitment of the merchant to be clear and transparent on the offer and prices before the consumer enters the order process, and the commitment of the merchant to offer the client transparent, easily acceptable and safe payment methods.

More harmonization on a European level

The Ecommerce Europe Trustmark is connected to a membership of participating National Associations. This means that all online shops in Europe which are certified by a National Association can already carry the Ecommerce Europe Trustmark for free next to their national trustmark. The final goal is to reach a higher level of consumer protection and more harmonization on a European level, and Ecommerce Europe achieves this – together with its National Associations and their members – by constantly upgrading the set of criteria and level of consumer protection with which merchants have to comply.

More information

To find out more about the Ecommerce Europe Trustmark and the Code of Conduct, please visit: <http://www.ecommercetrustmark.eu/>

Impact of E-commerce on the Economy

A Brief Introduction to Europe

Gross Domestic Product

Europe's total Gross Domestic Product (GDP) is estimated to have reached around **€17.6 trillion** in 2015, and that of the EU28 amounted to nearly **€14.6 trillion**. Ecommerce Europe estimates the share of the European Internet economy in the GDP at **2.59%**, a percentage that is set to nearly double by 2020.

The number of jobs created directly and indirectly by the B2C e-commerce sector is estimated at nearly 2.5 million in Europe, a figure that will grow with the on-going increase and penetration of the Internet in the European society, and the projected growth of (B2C) e-commerce.

750,000 websites

According to data received from national e-commerce associations, Ecommerce Europe estimates the number of B2C websites to have grown to around **750,000** at the end of 2015, growing at a pace of 1% to 15% per year.

This number is set to grow even more given the growth anticipated in the upcoming markets in the South and the East, where B2C e-commerce is rapidly closing the gap with the more mature markets in Western and Central Europe.

4.2 billion parcels sent

Postal and private operators have reaped the fruits of the impressive growth over the past years of (B2C) e-commerce. Ecommerce Europe estimates the annual number of B2C parcels sent to customers domestically and cross-border to other (European) countries at **4.2 billion**, a number that will certainly continue to grow as a result of the forecast increase for B2C e-commerce in Europe.

The share of e-commerce in the European GDP was **2.59%** in 2015



2.5 million+

Estimated number of jobs created by B2C e-commerce sector



750,000

Estimated number of active B2C websites



4.2 billion+

Estimated number of parcels sent in Europe

Overview of the European Countries

A Brief Introduction to Europe

EU countries

The continent of Europe consists of 47 countries, of which 28 countries are members of the European Union. This table provides an overview of the EU members, in alphabetic order. It includes relevant information, such as the currency of each country as well as their respective VAT rates. More elaborate information on VAT can be found in the country reports.

Establishment

The European Union is an economic and political partnership between 28 European countries and was created in the aftermath of the Second World War. Initially, it was established to foster economic cooperation, the idea being that countries that trade with one another become economically interdependent and will therefore be more likely to avoid conflict.

Organizations

Today, the EU is the most important collaborative partnership in Europe. The participating countries established a number of organizations for this Union, to which they have transferred a part of their powers. These organizations include the European Parliament, the European Commission, the European Council and the Court of Justice of the European Union.

The cooperation between these members states is characterized by far-reaching economic integration. In 1986, the tariffs between member states were abolished, creating one internal market. In addition, 12 member states decided to introduce one common currency (the euro) in 1998, and later on, this Eurozone was expanded to 19 countries.

Country (EU28)	Capital	VAT	Currency	Population	EU28
Austria	Vienna	20%	Euro (EUR)	8.6mn	EU28
Belgium	Brussels	21%	Euro (EUR)	11.3mn	EU28
Bulgaria	Sofia	20%	Lev (BGN)	7.2mn	EU28
Croatia	Zagreb	25%	Kuna (HRK)	4.2mn	EU28
Cyprus	Nicosia	19%	Euro (EUR)	0.8mn	EU28
Czechia	Prague	21%	Koruna (CZK)	10.5mn	EU28
Denmark	Copenhagen	25%	Krone (DKK)	5.7mn	EU28
Estonia	Tallinn	20%	Euro (EUR)	1.3mn	EU28
Finland	Helsinki	24%	Euro (EUR)	5.5mn	EU28
France	Paris	20%	Euro (EUR)	66.4mn	EU28
Germany	Berlin	19%	Euro (EUR)	81.2mn	EU28
Greece	Athens	23%	Euro (EUR)	10.9mn	EU28
Hungary	Budapest	27%	Forint (HUF)	9.9mn	EU28
Ireland	Dublin	23%	Euro (EUR)	4.6mn	EU28
Italy	Rome	22%	Euro (EUR)	60.8mn	EU28
Latvia	Riga	21%	Euro (EUR)	2.0mn	EU28
Lithuania	Vilnius	21%	Euro (EUR)	2.9mn	EU28
Luxembourg	Luxembourg	17%	Euro (EUR)	0.6mn	EU28
Malta	Valletta	18%	Euro (EUR)	0.4mn	EU28
Netherlands	Amsterdam	21%	Euro (EUR)	16.9mn	EU28
Poland	Warsaw	22%	Zloty (PLN)	38.0mn	EU28
Portugal	Lisbon	23%	Euro (EUR)	10.4mn	EU28
Romania	Bucharest	20%	New Leu (RON)	19.9mn	EU28
Slovakia	Bratislava	20%	Euro (EUR)	5.4mn	EU28
Slovenia	Ljubljana	22%	Euro (EUR)	2.1mn	EU28
Spain	Madrid	21%	Euro (EUR)	46.4mn	EU28
Sweden	Stockholm	25%	Krone (SEK)	9.7mn	EU28
United Kingdom	London	20%	Pound (GBP)	64.9mn	EU28

Source: Worldbank, IMF, PwC and Ecommerce Foundation, 2016

Overview of the European Countries

A Brief Introduction to Europe

Non-EU countries

In total, there are 19 countries that are not (yet) a member of the European Union. Eleven of these countries do not have the intention to become a member at the moment. The remaining eight are in the process of obtaining a membership. Bosnia & Herzegovina and Kosovo are so-called potential candidates, while Albania, FYR Macedonia, Montenegro, Serbia and Turkey are full candidates. These eight countries are all depicted as Candidates in the table, which provides relevant information for the 19 non-EU countries.

Country (Non-EU28)	Capital	VAT	Currency	Population	EU28
Albania	Tirana	20%	Lek (ALL)	2.9mn	Candidate
FYR Macedonia	Skopje	18%	Denar (MKD)	2.1mn	Candidate
Montenegro	Podgorica	19%	Euro (EUR)	0.6mn	Candidate
Serbia	Belgrade	20%	Dinar (RSD)	7.1mn	Candidate
Turkey	Ankara	18%	Lira (TRY)	77.7mn	Candidate
Bosnia & Herzegovina	Sarajevo	17%	Mark (BAM)	3.8mn	Candidate
Kosovo	Pristina	18%	Euro (EUR)	1.8mn	Candidate
Iceland	Reykjavik	24%	Krona (ISK)	0.3mn	NON-EU28
Andorra	Andorra La Vella	4.5%	Euro (EUR)	86,000	NON-EU28
Belarus	Minsk	20%	Ruble (BYR)	9.5mn	NON-EU28
Liechtenstein	Vaduz	8%	Sw.Franc (CHF)	37,000	NON-EU28
Moldova	Chişinău	20%	Leu (MDL)	3.6mn	NON-EU28
Monaco	Monaco	20%	Euro (EUR)	31,000	NON-EU28
Norway	Oslo	25%	Krone (NOK)	5.2mn	NON-EU28
Russia	Moscow	18%	Ruble (RUB)	146.3mn	NON-EU28
San Marino	San Marino	0%	Euro (EUR)	33,000	NON-EU28
Switzerland	Bern	8%	Sw. Franc (CHF)	8.2mn	NON-EU28
Ukraine	Kiev	20%	Hryvnia (UAH)	44.4mn	NON-EU28
Vatican City	Vatican City	20%	Euro (EUR)	690	NON-EU28

Source: Worldbank, IMF, PwC and Ecommerce Foundation, 2016

B2C E-commerce in Europe

European B2C E-commerce Market of Goods & Services



Commissioned by:



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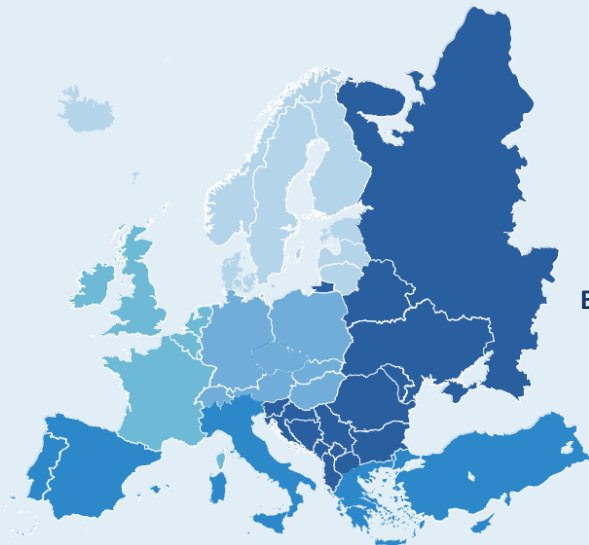
685mn people are over the age of 15



516mn people use the Internet (75%)



296mn people are e-shoppers (43%)



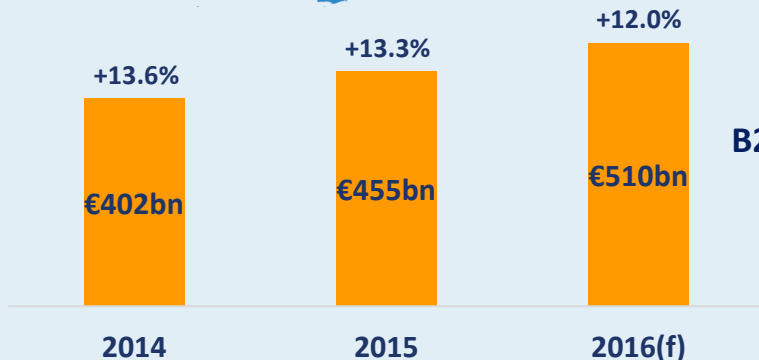
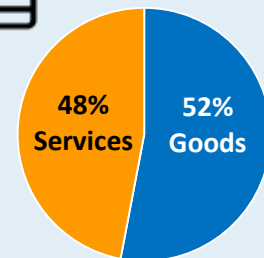
Estimated share of online goods in total retail of goods



Total GDP of €17,591bn



Share of e-commerce in GDP 2.59%



European B2C turnover

Executed by: Ecommerce FOUNDATION

In cooperation with: GfK

Powered by:

ASENDIA
BY LA POSTE & SWISS POST

ingenico GROUP

Manhattan Associates
supply chain commerce delivered

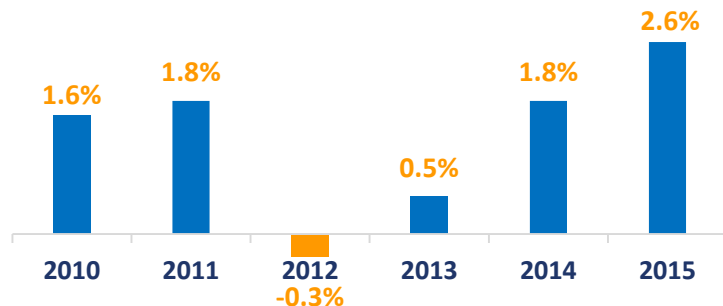
webhelp

GDP Real Growth Rate of EU28

The real growth rate of the **European Union's Gross Domestic Product (GDP)** was **2.6%** in 2015. This represented a significant improvement compared to the preceding year, as the GDP was **1.8%** in 2014.

GROWTH RATE OF THE EUROPEAN GDP

Percentage Change, 2010 - 2015



Sources: Eurostat, Ecommerce Foundation, IMF and Worldbank, 2016

eGDP

In terms of the **share of e-commerce in GDP**, the UK is clearly above the rest, with a share of **6.1%**.

It is interesting to see that the Northern European countries score quite well in terms of eGDP. **Denmark (4.4%)**, **Finland (3.5%)**, **Norway (2.3%)** and **Sweden (2.2%)** are all in the top 10.

TOP 10 COUNTRIES IN TERMS OF eGDP

GDP at market prices, GDP per capita at market prices and share of e-commerce in GDP, 2015

	GDP at market prices	GDP per capita at market prices	Share of e-commerce in GDP
<i>Europe</i>	€17,591bn	€26,948	2.6%
<i>EU28</i>	€14,633bn	€26,911	2.8%
<i>Top 10</i>	€7,414bn	€41,070	3.1%
United Kingdom	€2,568bn	€39,400	6.1%
Denmark	€266bn	€46,800	4.4%
Finland	€207bn	€37,800	3.5%
France	€2,184bn	€32,900	3.0%
Ireland	€215bn	€46,200	2.8%
Czechia	€164bn	€15,600	2.6%
Netherlands	€678bn	€40,000	2.4%
Norway	€351bn	€67,600	2.3%
Austria	€337bn	€39,100	2.2%
Sweden	€444bn	€45,300	2.2%

Sources: Eurostat, Ecommerce Foundation, IMF and Worldbank, 2016

Internet Penetration

B2C E-commerce in Europe

Internet penetration

The average **Internet penetration** in Europe increased to **75.3%** in 2015. For the countries in the **European Union**, this rate is slightly higher, as **81.5%** of their residents was connected to the Internet last year.

In the top 10 of European countries in terms of Internet penetration, it is interesting to see that all **Scandinavian countries** are represented.

Eastern and Southern Europe

While this top 10 mainly consists of countries from **Western, Central** and **Northern Europe**, the top 5 of the lowest Internet penetration solely comprises countries from the **Eastern** and **Southern European regions**.

TOP 10 COUNTRIES IN TERMS OF INTERNET PENETRATION

Internet access and online population, 2015

Countries	Internet access*	Online population
Europe	75.3%	515.8mn
EU28	81.5%	350.2mn
Top 10	94.7%	153.9mn
Iceland	98.0%	0.3mn
Luxembourg	98.0%	0.5mn
Netherlands	98.0%	13.6mn
Denmark	97.0%	4.6mn
Norway	97.0%	4.1mn
Finland	93.0%	4.3mn
United Kingdom	93.0%	49.8mn
Switzerland	92.0%	6.4mn
Sweden	92.0%	7.4mn
Germany	89.0%	62.9mn

Sources: Eurostat, Ecommerce Foundation and Worldbank, 2016

*share of total population excluding people aged 0-14

TOP 5 LOWEST INTERNET PENETRATION

Internet access and online population, 2015

Countries	Internet access*	Online population
Top 5	60.4%	103.0mn
Turkey	54.0%	31.3mn
Ukraine	58.0%	21.9mn
Bulgaria	60.0%	3.7mn
Romania	62.0%	10.5mn
Italy	68.0%	35.7mn

E-commerce is better together with stores

Online and mobile have changed the face of retail forever and e-commerce is stage front and center when it comes to driving increased revenues. However, this digital channel is ever stronger when coupled with the physical store.

Shopping today is channel agnostic. Consumers may start to shop for an item online, browsing different brands, finding the right style, the right price but they may well finish their purchase in-store deciding they want to touch and feel it just to be sure or because they want immediate gratification. And vice versa, they might spot something in-store and then go online to complete the transaction.

Retailers need to couple bricks and mortar with digital to have a chance of satisfying shoppers. The experience needs to be seamless and connected. Consumers need to be able to see where their purchases are and when they can get their hands on it. Inventory availability in-store and online is crucial.

This means further connecting your business by bringing your supply chain into your point of sale and by allowing your customer to see into that supply chain. Arming store associates or indeed your commerce front end with real-time inventory availability from across your network (warehouse, suppliers, stores and goods in-transit) you will be able to delight your customers with the information they need to make an informed purchase.

By opening up your supply chain and including stores to fulfil your online orders, you will find yourself able to respond effectively to those consumers who prefer click 'n collect or indeed could offer same day delivery to their homes. Stores create an opportunity to enhance the customer experience and delight shoppers into coming back time and time again.

“Seamless engagement, regardless of channel. Let the customer start their purchase online but finish in the store, or vice versa”



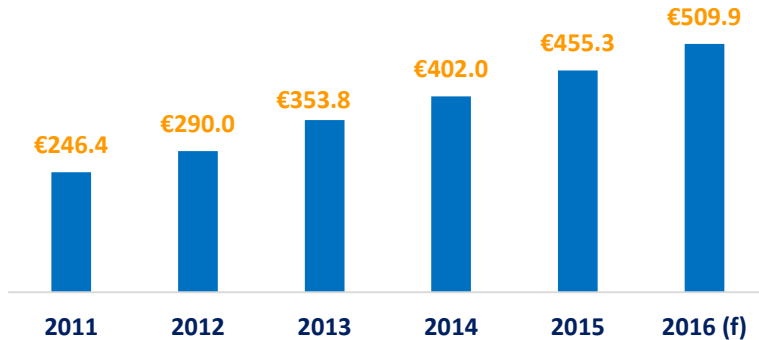
Pieter Van den Broecke
Managing Director
Benelux and Germany
at Manhattan Associates

Growth in European B2C E-commerce Sales

B2C E-commerce in Europe

EUROPEAN B2C E-COMMERCE SALES

Total online sales of goods and services in Europe, in billions of euros, 2011 - 2016 (f)



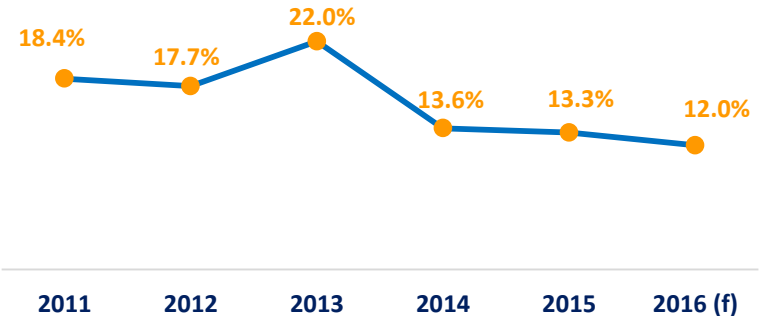
Sources: Ecommerce Foundation, National Associations and other sources, 2016

Growth

The **European B2C e-commerce sales** have been growing steadily since 2011. Still, the growth rate has decreased the last few years, from **18.4%** in 2011 to **13.3%** in 2015. This trend is expected to continue in 2016, as a growth rate of **12.0%** is forecast, resulting in a European B2C e-commerce turnover of **€509.9bn**.

EUROPEAN B2C E-COMMERCE GROWTH RATE

Percentage change in B2C e-commerce turnover, 2011 - 2016 (f)



Source: Ecommerce Foundation, 2016

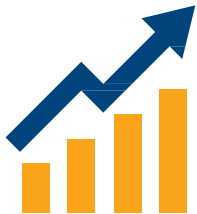
Top 10 Countries B2C E-commerce Sales

B2C E-commerce in Europe

Top 10 countries

In the category of **B2C e-commerce sales**, the **UK** is the clear leader in Europe. In 2015, the British in total spent **€157.1bn** online, which is more than **France** (€64.9bn), **Germany** (€59.7bn) and **Russia** (€20.5bn) combined .

In the **Overview and Forecast** chapter, a complete overview of all European countries with regard to **B2C e-commerce sales and growth rates** is included.



13.3%

Average growth of online
B2C sales e-commerce in
Europe in 2015

TOP 10 COUNTRIES IN TERMS OF B2C E-COMMERCE SALES

Online sales of goods and services, 2011 - 2016 (f)

Countries	2011	2012	2013	2014	2015	2016 (f)
<i>Europe</i>	<i>€246.4bn</i>	<i>€290.0bn</i>	<i>€353.8bn</i>	<i>€402.0bn</i>	<i>€455.3bn</i>	<i>€509.9bn</i>
<i>EU28</i>	<i>€224.7bn</i>	<i>€263.0bn</i>	<i>€319.7bn</i>	<i>€359.1bn</i>	<i>€407.4bn</i>	<i>€455.5bn</i>
<i>Top 10</i>	<i>€209.4bn</i>	<i>€245.7bn</i>	<i>€301.3bn</i>	<i>€340.9bn</i>	<i>€383.0bn</i>	<i>€425.6bn</i>
United Kingdom					€157.1bn	
France	€37.7bn	€45.0bn			€64.9bn	
Germany					€59.7bn	
Russia			€14.7bn		€20.5bn	
Spain					€18.2bn	
Italy					€16.6bn	€19.1bn
Netherlands	€10.9bn				€16.1bn	
Denmark					€11.7bn	
Sweden				€8.6bn	€9.7bn	
Switzerland		€5.5bn			€8.5bn	

Source: Ecommerce Foundation, National Associations and other sources, 2016

Share of Top 10 Countries in B2C E-commerce Sales

B2C E-commerce in Europe

E-commerce powers

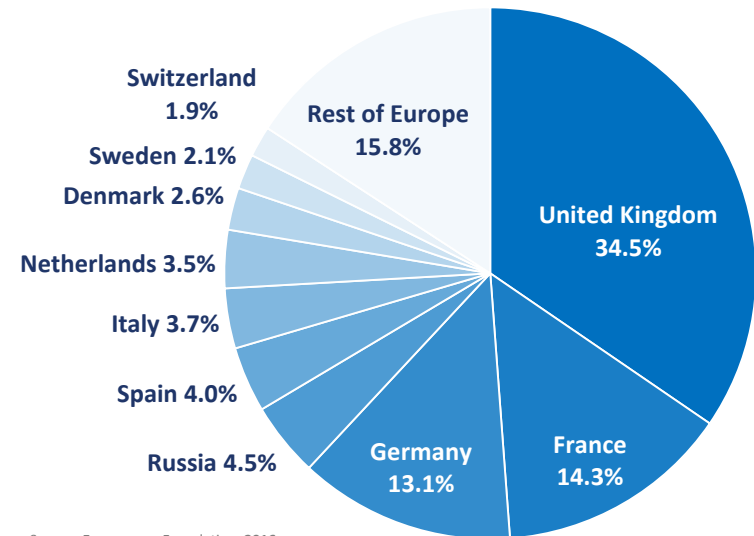
The graph of the **European B2C e-commerce market** immediately shows the importance of the **UK**. After all, its market has a share of more than **one third** of the entire European e-commerce market. In addition, the share of the UK is more than twice as much as all the other countries outside the top 10 combined.

The share of the top 10 countries in the total European B2C e-commerce (**€383.0bn**) markets is almost **85%**. However, within the top 10 the difference between the United Kingdom, France and Germany and the rest is also significant. Together, the **UK**, **France** and **Germany** account for **61.9%**, while the other seven countries combine for **22.3%**.

The differences between the seven smaller markets in the top 10 are almost negligible. The share of number four **Russia** (**4.5%**) is only **2.6%** larger than that of number ten **Switzerland** (**1.9%**).

TOP 10 COUNTRIES SHARE OF EUROPEAN B2C E-COMMERCE MARKET

Share of European B2C e-commerce market, 2015



Source: Ecommerce Foundation, 2016

“The checkout process can and should be an opportunity to build a positive relationship with customers”

1. What is the importance of having a good payment service provider?

“Accepting payments online can be complicated, especially for merchants who sell into multiple countries. A good, full-service PSP reduces the complexity of accepting local and cross-border payments for online merchants and lets them focus on their core business.”

2. What are the latest payment developments?

“Mobile continues to be a big consideration for many merchants, who see traffic from mobile devices growing but have difficulty converting this into sales because the checkout experience is not optimized. What we see is that merchants increasingly use data analytics tools to better understand payment trends and to improve performance.”

3. What should one take into account in terms of online payments when going cross-border?

“Companies should understand that consumer preferences and behavior are different in each market. To successfully sell cross-border, it is important to create a checkout experience that is localized for each market. A full-service, collecting PSP helps to manage that complexity for merchants.”

4. In what area should online payments in your country improve in the short and the long term?

“The checkout experience should adapt and be optimized for any device used, whether it is a desktop, a tablet, a smartphone, a smart watch, a connected car, or any other connected device.”



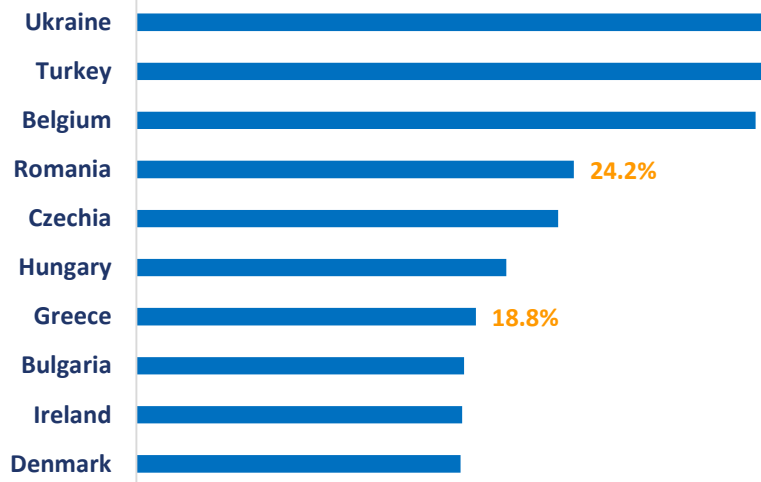
Elie Casamidjana
Global Lead, Offering
& Go-to-Market
at Ingenico ePayments

B2C E-commerce Growth Rate per Country

B2C E-commerce in Europe

TOP 10 COUNTRIES IN TERMS OF B2C E-COMMERCE GROWTH RATE

B2C e-commerce growth rate, 2015



Source: Ecommerce Foundation, 2016

Online Expenditure per E-shopper

B2C E-commerce in Europe

TOP 10 COUNTRIES E-SHOPPERS

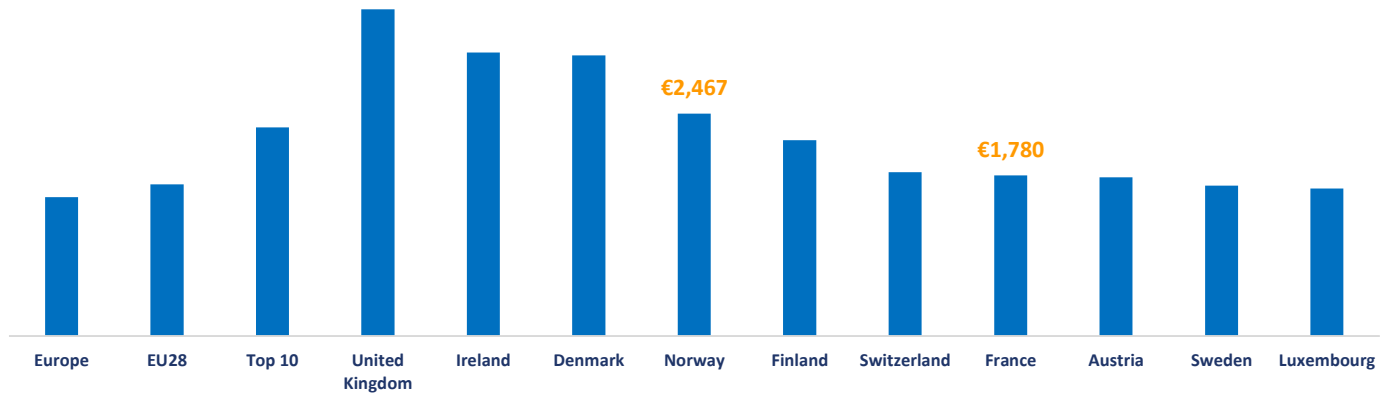
Number of e-shoppers in Europe, 2015

Countries	E-Shoppers
Top 10	237.3mn
Germany	
United Kingdom	
France	
Russia	
Italy	
Spain	
Netherlands	12.9mn
Poland	
Turkey	
Belgium	6.9mn

Source: Eurostat, Ecommerce Foundation and National Associations, 2016

TOP 10 COUNTRIES IN TERMS OF AVERAGE SPENDING PER E-SHOPPER

Spending per online shopper, 2015



Source: Ecommerce Foundation, National Associations and other sources, 2016

1. What are the greatest cross-border challenges within Europe?

Cross-border e-commerce is driving global growth and is expected to grow 27% each year, reaching more than €1 trillion by 2020, according to estimates. The European Union (EU) is home to about 510 million people and thanks to borderless trade, the growth of e-commerce in the EU and countries such as Norway and Switzerland, and reliable financial and logistical infrastructure, it represents a fantastic opportunity for international e-retailers.

To ensure smooth cross-border entry, international e-merchants should follow the same principles that they apply in their domestic markets with regard to their product offering and customer service. In fact, they should invest even more in customer service to ensure complete transparency in the delivery process and to compete with existing local suppliers.

Payment methods must be adapted to the local market, retail prices should be listed in the local currency, checkout prices should include all taxes and duties, and if any additional customer service is required, it should be provided by native speakers.

To ensure success, e-merchants must offer flexible distribution solutions, free returns and clear information regarding the location of dispatch and delivery times.

2. What logistical developments in Europe are supporting the e-commerce opportunities?

International e-retailers have to create their own network and establish dedicated teams to manage the relationship between their own logistics and the systems used by local suppliers. Challenges include different quality standards, labelling and tracking systems, increased complexity and costs, and conflicting promises to European customers.

“Cross-border is e-commerce is expected to grow 27% each year, to more than €1 trillion by 2020”



Renaud Marlière
Chief Sales & Marketing
Officer at Asendia

“The key to delivery is to offer choice to all customers”

In January 2016, European postal operators signed the global e-Commerce INTERCONNECT initiative, creating a new model that will revolutionize e-commerce in Europe. Public Postal Operators now have a clear ambition: to create the leading B2C network for e-packet delivery in Europe, based on a wide choice of distribution options (from home delivery to pick-up drop-off services), an improved quality of service that is monitored by a common tracking system in Europe, and a competitive pricing model.

In the short term, postal companies that are B2C distribution specialists in their respective countries will be able to offer a globally integrated network. Quality will go up, customer prices will come down and it will boost cross-border traffic across Europe.

At Asendia, we have already integrated these distribution solutions into our offer and have cut delivery prices by 40% for 1kg parcels to a number of European countries.

3. Do you have any tips for e-merchants in terms of delivery and returns?

Offer a range of distribution options to customers. Some European e-shoppers will expect delivery in two days and are willing to pay €10 to €20 more for this service. Others are happy to wait five to six days for delivery. For some buyers, convenience is more important and they want home delivery or delivery to a nearby post office; the key is to offer all customers choice.

Placing an order from a merchant based in another country should never generate questions and doubts; the best approach is to propose clear, easy and free returns to gain the trust of your customers.



Renaud Marlière
Chief Sales & Marketing
Officer at Asendia

Popular E-commerce Categories

B2C E-commerce in Europe

OVERVIEW OF POPULAR PRODUCT AND SERVICE GROUPS IN EUROPE

Online sales and growth rates of popular product groups (estimated)

Goods	2014	2015	Growth
Clothing			
Shoes and Personal Lifestyle			
Media & Entertainment			
Information Technology			
Home & Garden			
Telecom			10.4%
Others			
Health & Beauty			
Household Electronics		€14.3bn	
Food/Nearfood		€12.2bn	
Consumer Electronics			
Toys	€8.3bn		
Sports & Recreation			

Source: Ecommerce Foundation, 2016

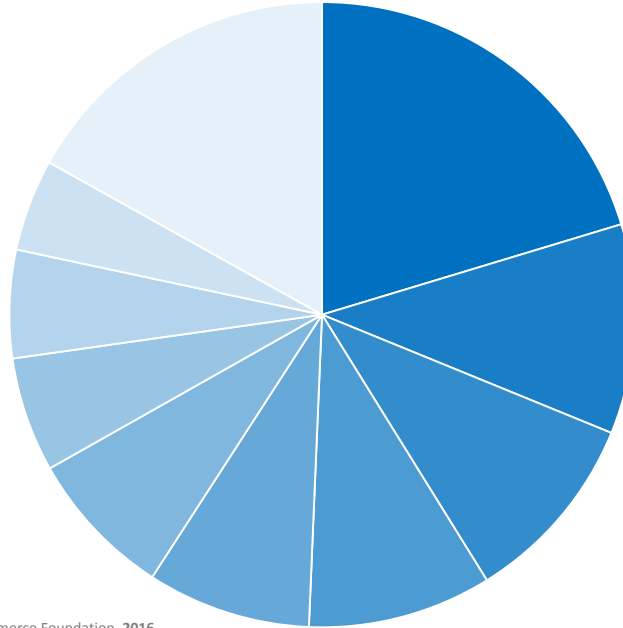
Services	2013	2014	Growth
Flight Tickets and Accommodations			
Package Travel	€40.3bn		
Insurance		€24.8bn	
Event Tickets			
Other Services			

Market Share of Product Categories

B2C E-commerce in Europe

MARKET SHARE OF PRODUCT CATEGORIES EUROPE

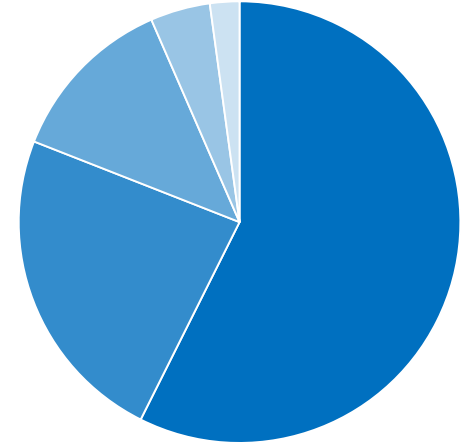
Market share of the most popular product categories in Europe in 2015



Source: Ecommerce Foundation, 2016

MARKET SHARE OF SERVICE CATEGORIES EUROPE

Market share of the most popular product categories in Europe in 2015



Source: Ecommerce Foundation, 2016

Online B2C Sales per Service/Product Group

B2C E-commerce in Europe

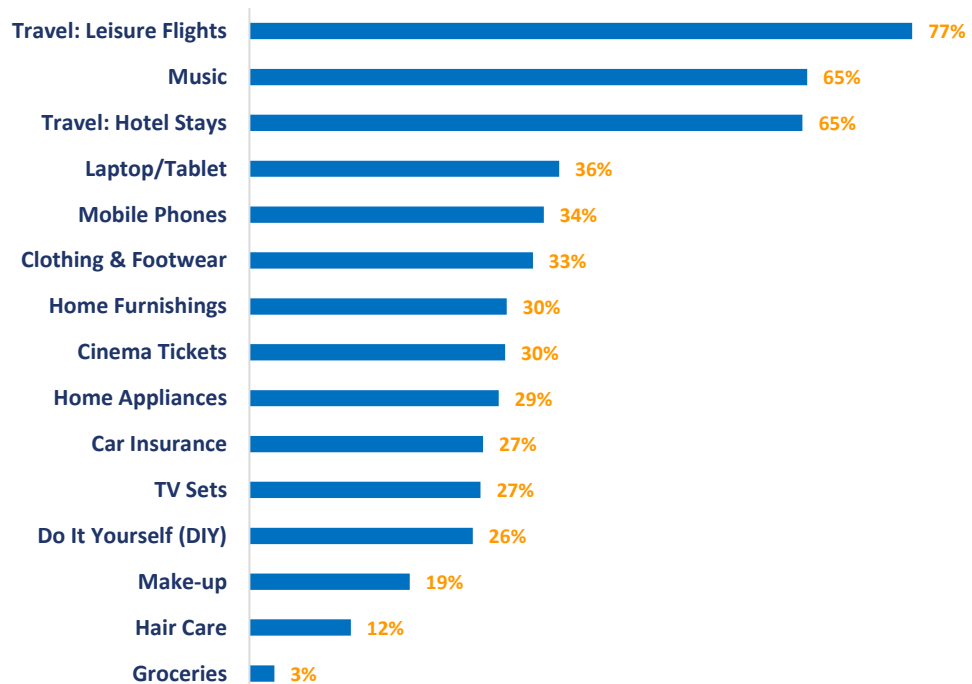
Online sales per service/product group

This table shows the percentage of online B2C sales in the total product and services group as defined on Google Barometer. For example, of all the European B2C sales in the **Cinema Tickets** category, **30%** were made online.

The table shows that **travel-related services** are frequently sold online. People do not have to physically go to a travel agency anymore for their flights or hotel accommodation. As a result, most sales in these categories are made **through the Internet**. On the other hand, **Groceries** are often still bought at a supermarket or grocery store.

ONLINE B2C SALES PER SERVICE/PRODUCT GROUP

The percentage of online B2C sales in each service/product group, 2014-2015



Sources: Ecommerce Foundation and Google Barometer, 2016

An omni-channel approach is insuperable

Whether their business is online, in physical stores or both, all retailers face similar challenges. They have to deliver a seamless customer experience at every touchpoint, maximize sales across every channel and device, and live up to their promises regarding product availability and delivery. In order to create a strong retail brand to which consumers will return, they must turn shopping into retail therapy – effortless, relaxing and ultimately enjoyable.

Customer experiences should not happen by accident, but must be engineered. This means that one should really understand his customer's journey and its moments of truth, and base his next best actions on smart and predictive data analytics. An omni-channel approach to service and sales is powering the retailers' ability to win hearts, minds and revenue share.



Gert-Jan Morsink
Member Executive Board Webhelp Group

Sales of Technical Consumer Goods

B2C E-commerce in Europe

INTERNET SALES TECHNICAL CONSUMER GOODS

Online sales of different categories within Technical Consumer Goods, January-December 2015

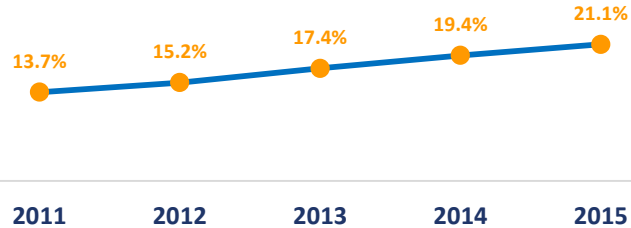
Technical consumer goods categories

Within technical consumer goods, **Information Technology** and **Telecom** items, such as computers and smartphones, have the biggest share in online sales in 2015. According to a study conducted by GfK in the countries mentioned below, **nearly one half** of the technical consumer goods turnover comes from these categories.

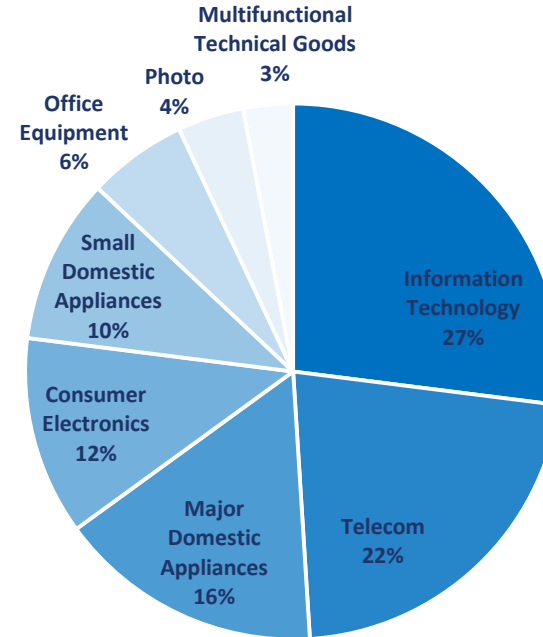
In total, **Internet sales** within technical consumer goods continued its upward trend last year. The share of online sales in total retail sales grew from **19.4%** in 2014 to **21.1%** in 2015.

GROWTH INTERNET SALES TECHNICAL CONSUMER GOODS

Growth of internet sales Technical Consumer Goods 2011 - 2015



Source: GfK, 2016



Source: GfK Point of Sales Tracking (excl. accessoires)

* Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Russia, Slovakia, Spain, Switzerland, UK and Ukraine (2015)

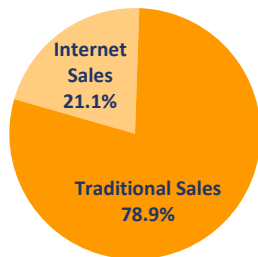


Online and Offline Sales of Technical Consumer Goods

B2C E-commerce in Europe

TECHNICAL CONSUMER GOODS B2C CHANNELS

Jan 15- Dec 15



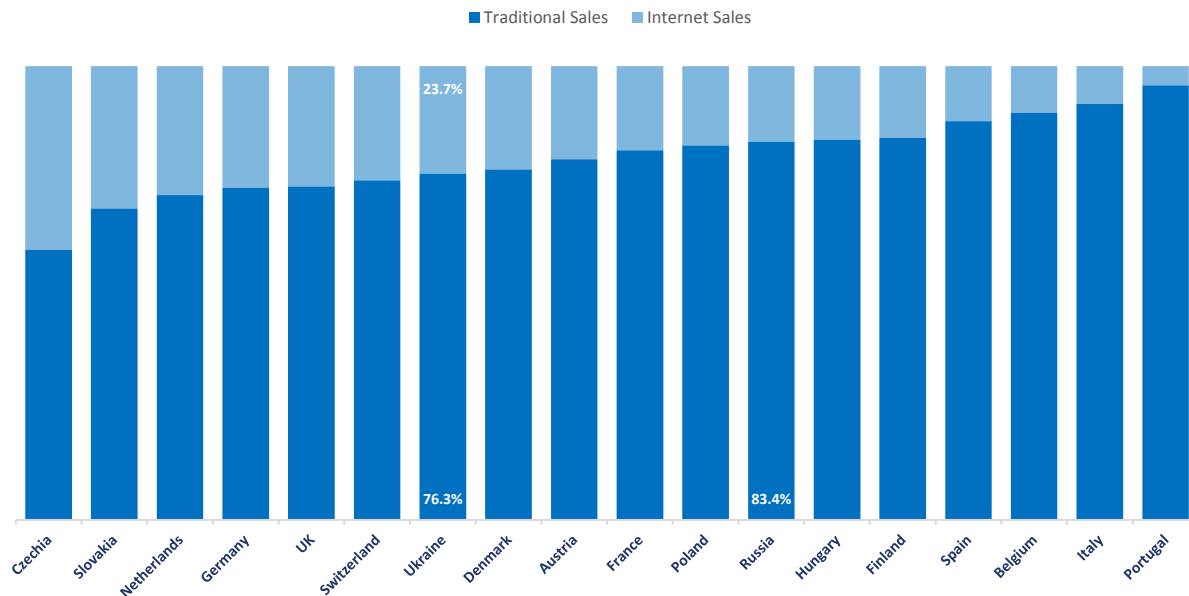
Technical consumer goods sales

With regard to purchases of Technical Consumer Goods, people often choose to make them in physical stores. Around **one fifth of sales** in this category was made through the Internet last year. This rate is expected to increase in the near future, as technical consumer goods are becoming increasingly popular among e-shoppers.

Of the countries mentioned in this study*, the share of online sales within this category was highest in the **Czechia**. More than **40%** of the turnover of technical consumer goods was made through the Internet.

EUROPEAN CONSUMER CHANNELS

Sales Value %, Jan 15 – Dec 15



Source: GfK Point of Sales Tracking (excl. accessoires)

* Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Russia, Slovakia, Spain, Switzerland, UK and Ukraine



Future of Retail – increasing shopper expectations

Success in today's retail world means meeting shoppers' expectations. As shoppers – particularly the younger ones – increasingly switch between purchase channels, retailers need to meet them where they are: everywhere.

Taking a look at the UK and Germany, we see that more than 65% of shoppers aged 21 or younger prefer to have both a physical and an online experience. Consumers expect shopping to be convenient, and expectations are still rising: 40% are looking for even easier shopping across on- and offline channels, 41% expect improved customer service, 45% want improved delivery service, and 46% ask for easier return and refund.



Markus Tuschl
Global Director Digital Retail at GfK

Future or Retail – is the sky the limit for online sales?

As retailers succeed in meeting shoppers omnichannel expectations, the share of online sales has increased. For Technical Consumer Goods across 18 European Countries, we observed an online share of 21.1% for the full year of 2015 in B2C markets, nearly two percentage points up from the year before.

Is there a limit?

Online sales largely differ by category. Drilling deeper, we can see that categories like Leisure GPS, Drones, Wearable Devices but also Vacuum Cleaner Robots reach an online sales value share that is clearly above 50% in some countries.

The question “Will online sales grow forever?” can be answered from a number of different angles. What is evident, however, is that an online proposition including mobile has to be part of a future-proof retail concept. To meet shoppers’ new expectations, online offers clear advantages in terms of choice, ease of search, shopping cross-category and even buying cross-border.



Markus Tuschl
Global Director Digital Retail at GfK

2015 Global Retail E-commerce Index

B2C E-commerce in Europe

Global Retail E-commerce Index

The **Global Retail E-commerce Index** is published annually by global management consulting firm A.T. Kearney and contains the top countries in terms of e-commerce performance. It ranks countries in four areas: **online market size**, **consumer behavior**, **growth potential** and **infrastructure**.

For the purpose of this report, we have only included European countries here, and the **United Kingdom** is the clear leader in Europe. On a global scale, the UK ranks third, behind the **US** and **China**.

Belgian and Danish e-commerce on the rise

One of the most interesting aspect of this index is **the rise of Belgium**. The Western European country climbed **15 positions** on the global list and was awarded one of the highest scores in terms of growth potential.

Denmark also significantly improved its position as it rose by **13 positions** to the **15th place** on the global list. Among other things, the Nordic nation was the only country in the list to achieve **a perfect score for consumer behavior**.

GLOBAL RETAIL E-COMMERCE INDEX

Total global online market attractiveness, 2015

Rank	Change in global rank	Country	Online market size (40%)	Consumer behavior (20%)	Growth potential (20%)	Infrastructure (20%)	Online market attractiveness score (100%)
1	+1	United Kingdom	87.9	98.6	11.3	86.4	74.4
2	+1	Germany	63.9	92.6	29.5	83.1	66.6
3	+1	France	51.9	89.5	21.0	82.1	59.3
4	+5	Russia	29.6	66.4	51.8	66.2	48.7
5	+15	Belgium	8.3	82.0	48.3	81.1	45.6
6	+6	Netherlands	8.9	98.8	8.1	84.6	41.8
7	+13	Denmark	8.1	100.0	15.1	75.5	41.4
8	0	Sweden	8.8	97.2	11.8	77.7	40.9
9	not ranked	Spain	13.2	73.1	20.2	80.1	39.9
10	+6	Norway	8.2	99.4	5.6	76.3	39.5
11	-7	Italy	12.3	71.6	27.8	70.7	38.9
12	+6	Switzerland	7.1	89.6	7.4	82.5	38.8
13	-4	Finland	6.4	98.3	3.8	77.3	38.4
14	not ranked	Austria	5.9	85.3	19.0	74.8	38.1
15	-3	Ireland	4.9	74.4	27.6	74.1	37.2

Source: A.T. Kearney, 2015

Url: <https://www.atkearney.com/consumer-products-retail/e-commerce-index>

Top Ranking Internet Retailers in Europe

B2C E-commerce in Europe

ONLINE TURNOVER INTERNET RETAILERS IN EUROPE

Total online turnover in Europe, 2014

Name Company	Country of origin	Online turnover in Europe (2014)
Amazon	USA	€24,230mn
Otto	Germany	€6,452mn
Apple	Luxembourg	€3,750mn
Tesco	UK	€3,533mn
Home Retail Group	UK	€2,328mn
Cdiscount	France	€2,235mn
Zalando	Germany	€2,214mn
E.Leclerc	France	€1,900mn
Shop direct	UK	€1,876mn
Next Plc	UK	€1,863mn
Carrefour	France	€1,800mn
Vente Prive	France	€1,700mn
Asda	UK	€1,700mn
Metro Group	Germany	€1,500mn
John Lewis	UK	€1,460mn

Source: Retail-index.com, 2016

Amazon remains biggest e-commerce company

The American e-commerce giant **Amazon** was the **best-selling e-commerce company** in Europe in 2014. With a total annual turnover of **€24.2bn**, Amazon was clearly ahead of German e-commerce company **Otto** at **€6.5bn** and American electronics company **Apple** (with its European headquarters in Luxembourg) at **€3.8bn**.

amazon.com

OTTO



Western Europe

An Overview of B2C E-commerce Markets of Goods & Services in Western Europe



Commissioned by:



Executed by:



Western Europe

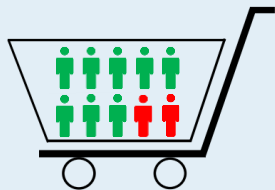
Key B2C E-commerce Data of Goods and Services at a Glance 2015



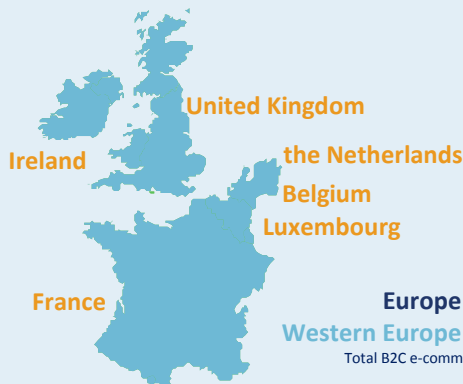
135mn people are over the age of 15



122mn people use the Internet (90%)



101mn people are e-shoppers (75%)



Ranking Western Europe in turnover (EUR million)

1		United Kingdom	€157,149
2		France	€64,900
3		The Netherlands	€16,070
4		Belgium	€8,241
5		Ireland	€5,900
6		Luxembourg	€687

National e-commerce associations:

Belgium



Luxembourg

France



The Netherlands

Ireland



Forecast 2016

€280bn

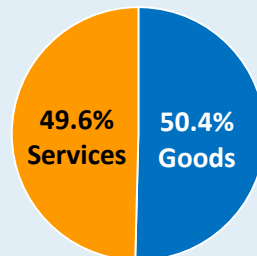
Turnover E-commerce Goods & Services

Total GDP of

€6,106bn



Share of e-commerce in GDP 4.14%



Estimated share of online goods in total retail of goods

Executed by:

In cooperation with:

Powered by:

ASENDIA
BY LA POSTE & SWISS POST

ingenico
GROUP

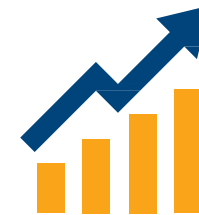
Manhattan
Associates
supply chain commerce solutions

webhelp

B2C E-commerce Turnover and Growth

Western Europe

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the full European B2C E-commerce Report
for a complete overview of European e-commerce](#)



12.9%

Growth of Western
Europe's B2C
e-commerce in 2015

WESTERN EUROPEAN B2C E-COMMERCE TURNOVER, 2011 - 2016

Countries	2011	2012	Growth	2013	Growth	2014	Growth	2015	Growth	2016 (f)	Growth
Belgium		€4,700mn						€8,241mn			
France								€64,900mn		€71,390mn	10.0%
Ireland			25.0%					€5,900mn			
Luxembourg							15.4%	€600mn			
The Netherlands				€12,877mn				€16,070mn			
UK								€157,149mn			
Total								€252,860mn	12.9%		

Source: Ecommerce Foundation, Belgische Markt Monitor, FEVAD, Statista, Thuiswinkel Markt Monitor, IMRG & Capgemini, 2016



Belgium



Population 15+

9.3mn



Internet users

8.0mn (86%)

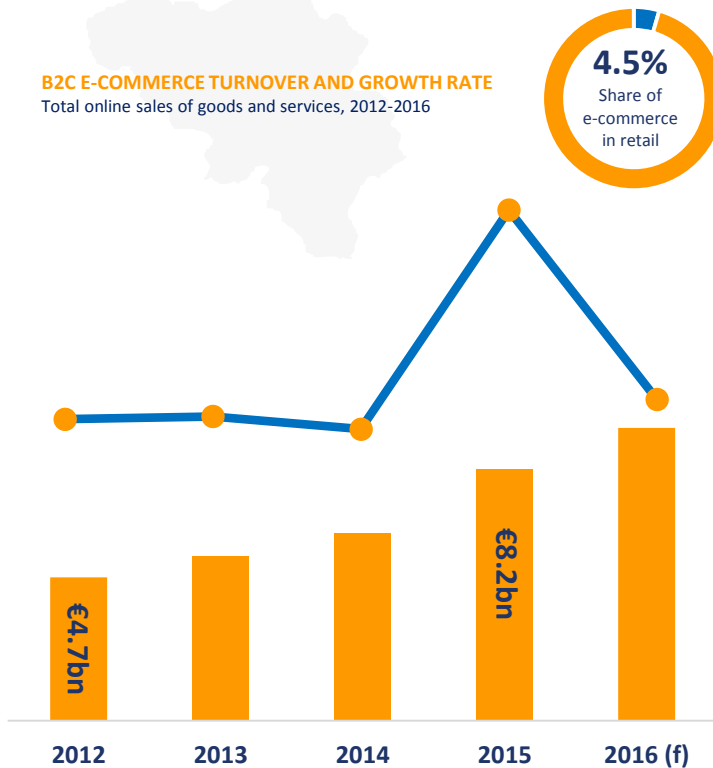


Number of e-shoppers

6.9mn (74%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

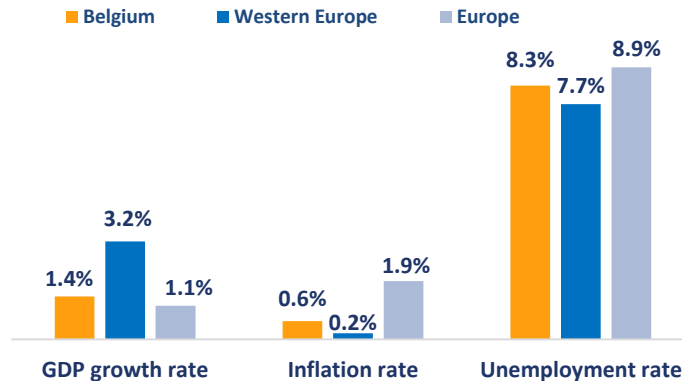


Source: Belgian Market Monitor and Ecommerce Foundation, 2016

E-commerce Markets

Western Europe

BELGIUM VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



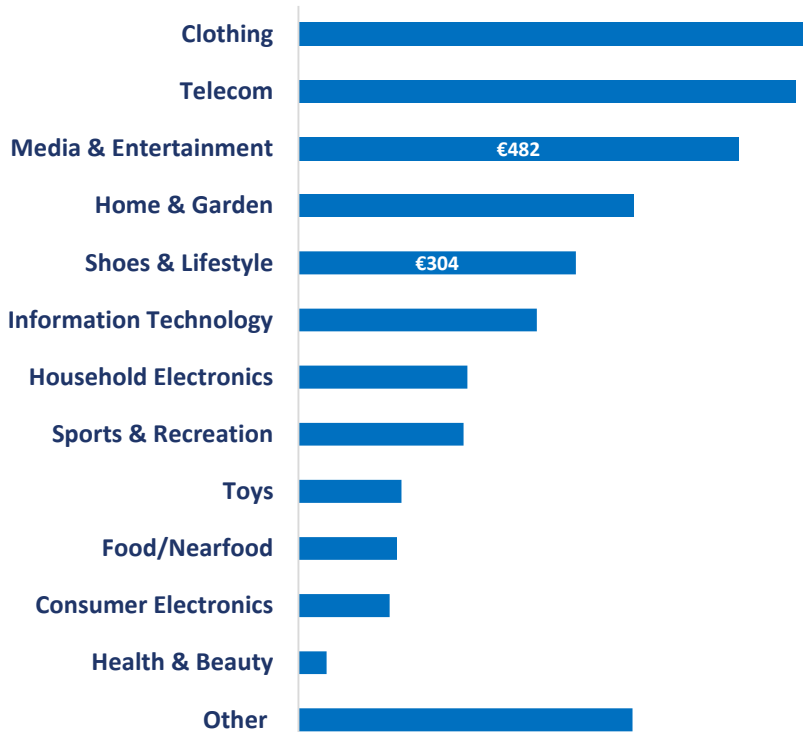
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation, Eurostat, Belgische Markt Monitor and GfK, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

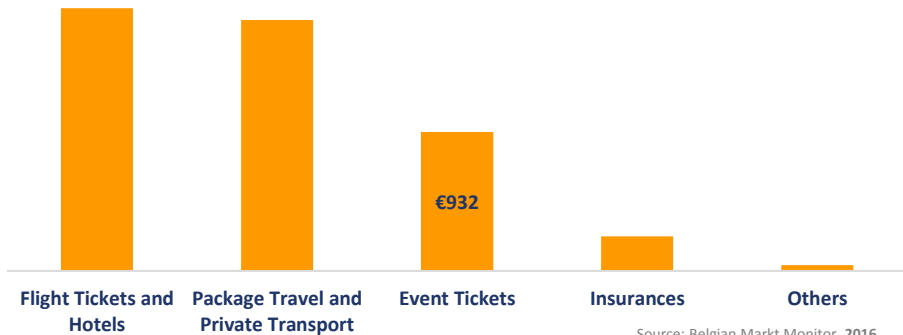
Online sales of popular product groups, in millions of euros, 2015



Source: Belgian Markt Monitor, 2016

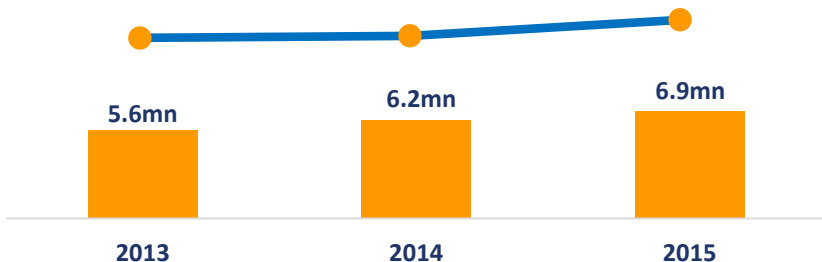
OVERVIEW OF POPULAR SERVICE GROUPS

Online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Belgian Markt Monitor and Ecommerce Foundation, 2016



Population 15+
54.0mn



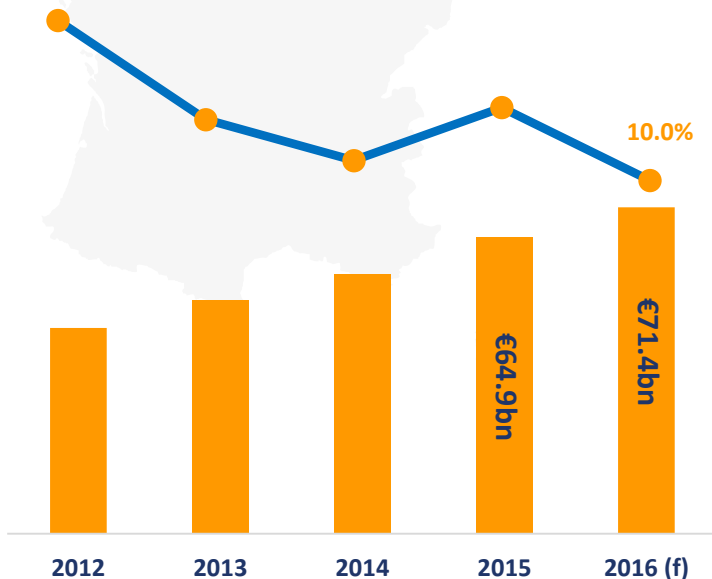
Internet users
47.0mn (87%)



Number of e-shoppers
36.0mn (67%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

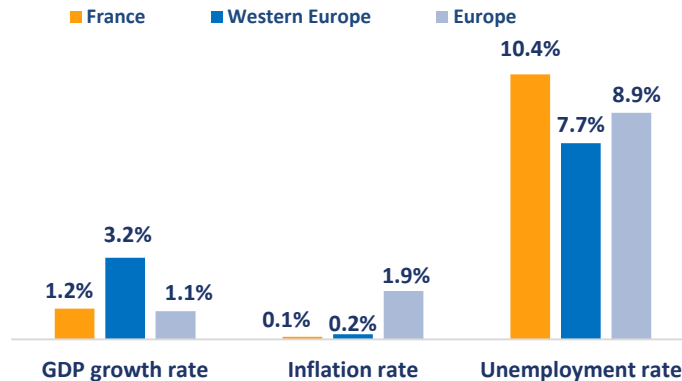


Source: FEVAD and Ecommerce Foundation, 2016

E-commerce Markets

Western Europe

FRANCE VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING

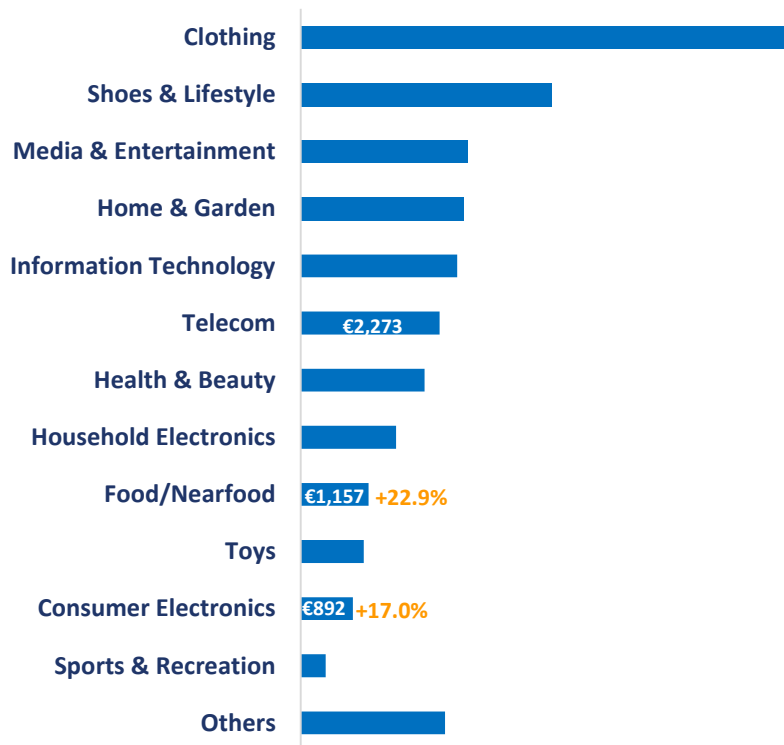


Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: FEVAD, Médiamétrie, Ecommerce Foundation and Eurostat, 2016

OVERVIEW OF POPULAR PRODUCT GROUPS

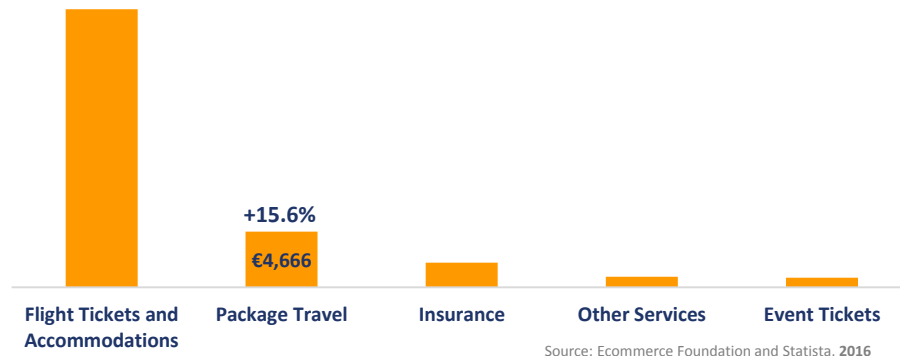
Estimated online sales of popular product groups, in millions of euros, 2015



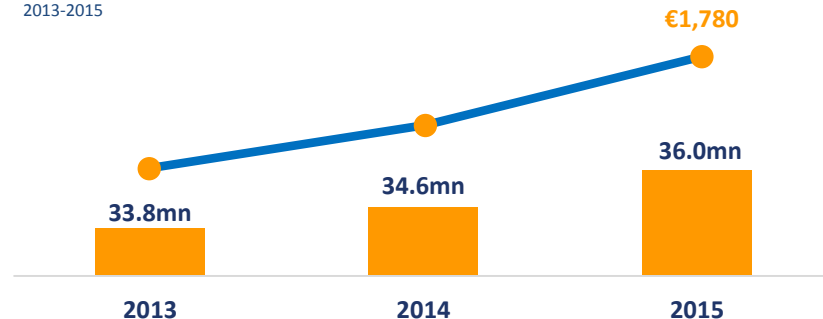
Source: Ecommerce Foundation and Statista, 2016

OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER 2013-2015





Population 15+
3.6mn



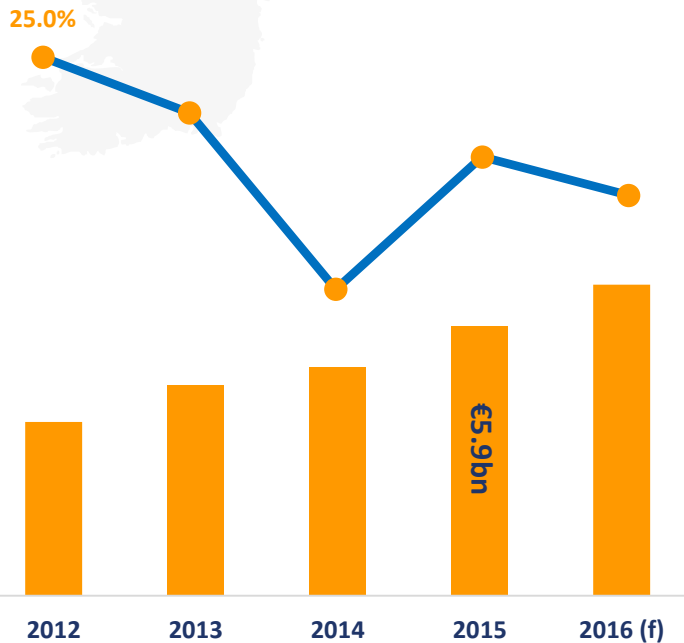
Internet users
3.0mn (82%)



Number of e-shoppers
1.9mn (52%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

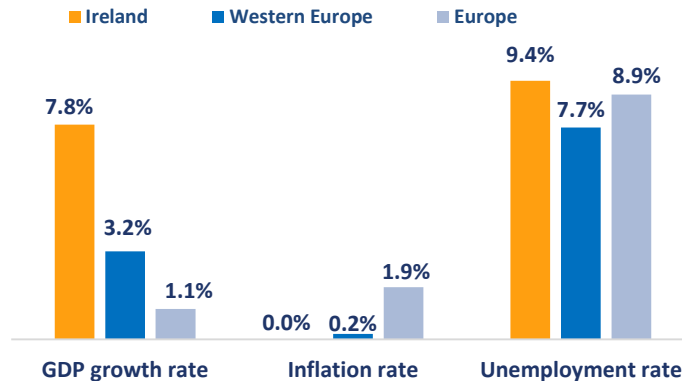


Source: Ecommerce Foundation, Retail Excellence and Statista, 2016

E-commerce Markets

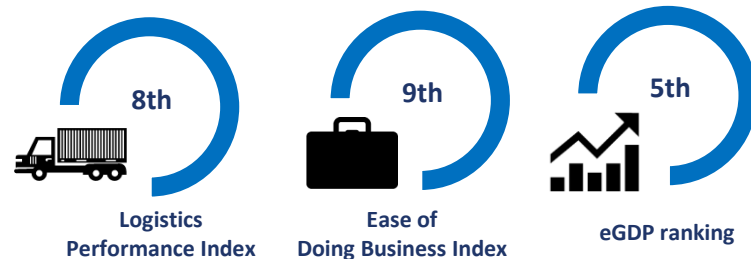
Western Europe

IRELAND VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING

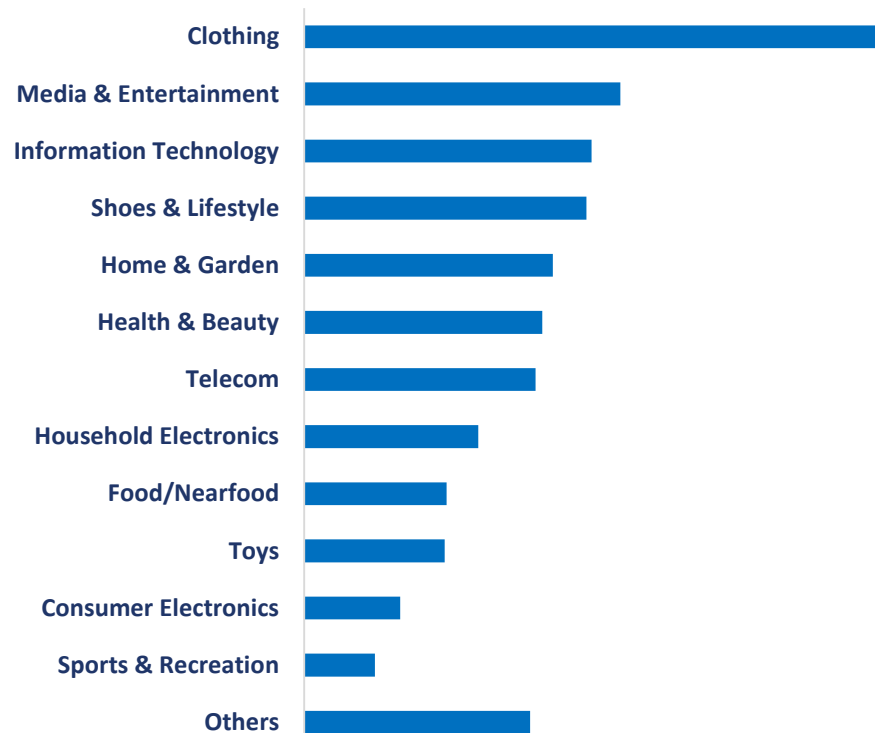


Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation and Eurostat, 2016

OVERVIEW OF POPULAR PRODUCT GROUPS

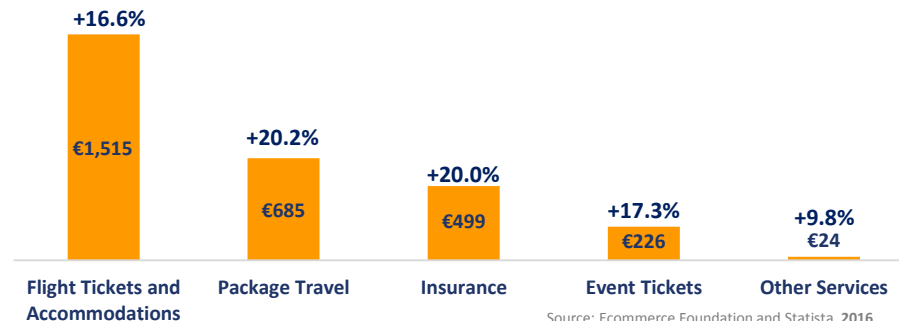
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

OVERVIEW OF POPULAR SERVICE GROUPS

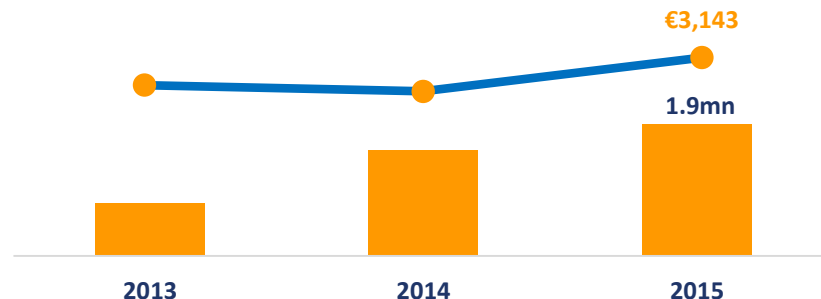
Estimated online sales of popular service groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation, Retail Excellence and Eurostat, 2016



Luxembourg



Population 15+
468k



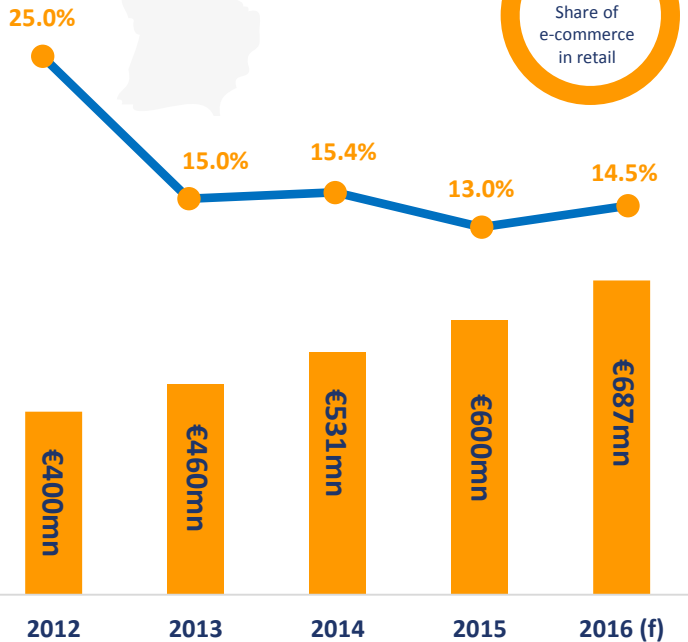
Internet users
458k (98%)



Number of e-shoppers
367k (78%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016



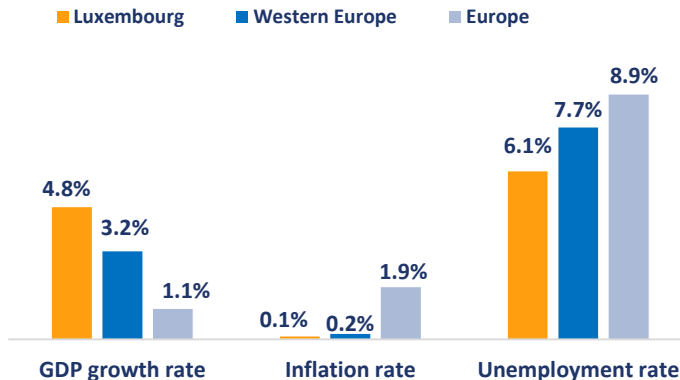
Source: Ecommerce Foundation, 2016



E-commerce Markets

Western Europe

LUXEMBOURG VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation and Eurostat, 2016





The Netherlands



Population 15+

13.9mn



Internet users

13.6mn (98%)

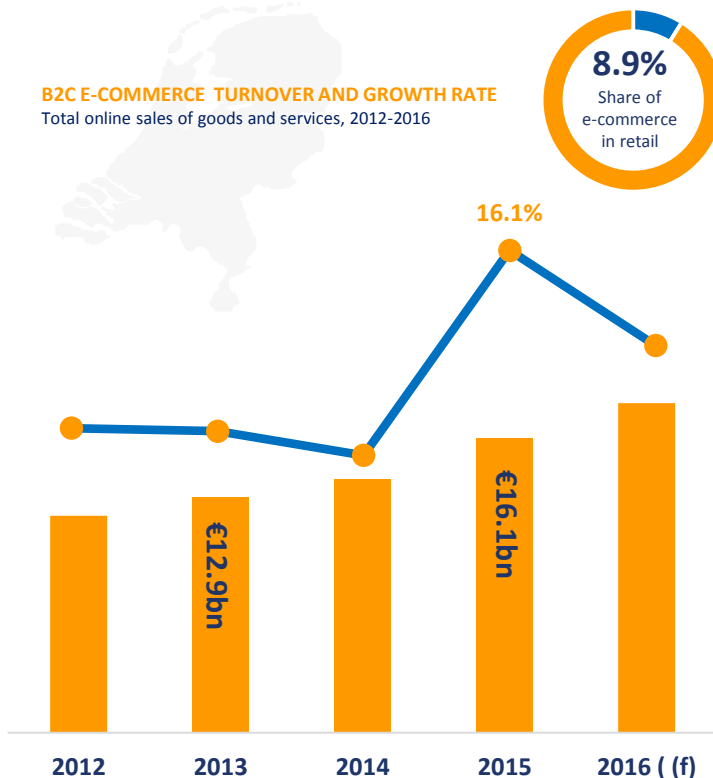


Number of e-shoppers

12.9mn (93%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016



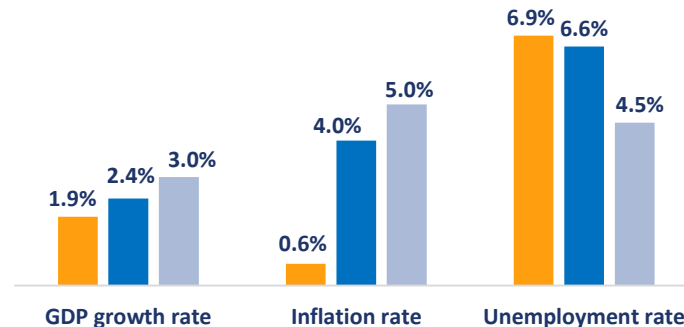
Source: Thuiswinkel Markt Monitor, GfK and Ecommerce Foundation, 2016

E-commerce Markets

Western Europe

NETHERLANDS VS REGIONAL AND EUROPEAN AVERAGES

■ Netherlands ■ Western Europe ■ Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

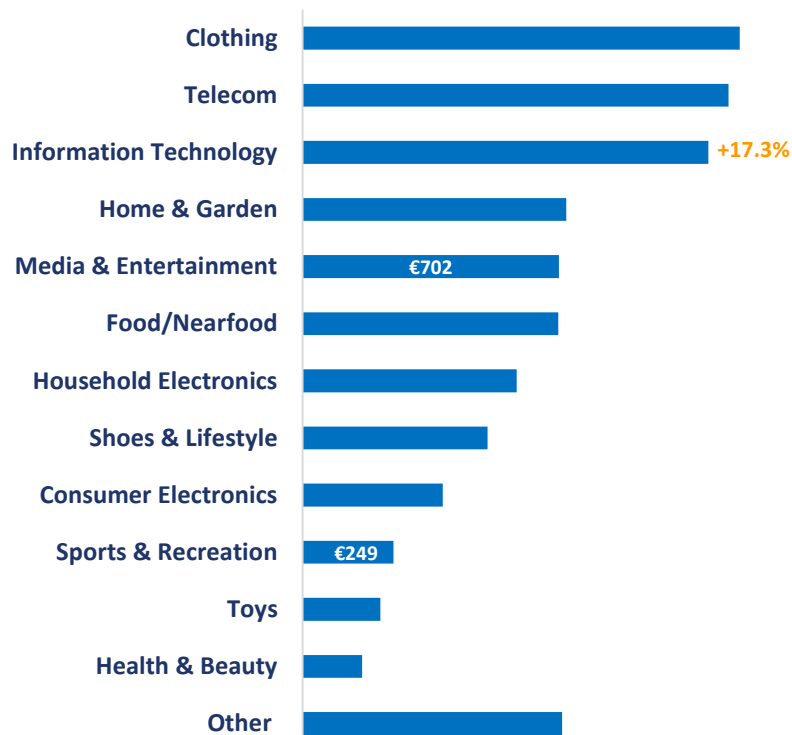
Source: Thuiswinkel Markt Monitor, Statistics Netherlands and Ecommerce Foundation, 2016



The Netherlands

OVERVIEW OF POPULAR PRODUCT GROUPS

Online sales of popular product groups, in millions of euros, 2015



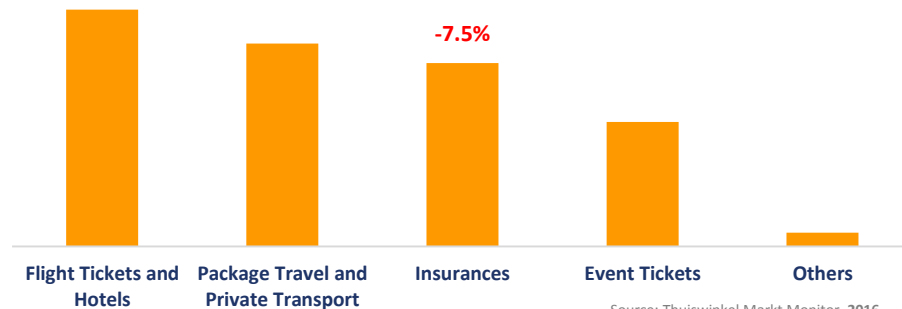
Source: Thuiswinkel Markt Monitor, 2016

E-commerce Markets

Western Europe

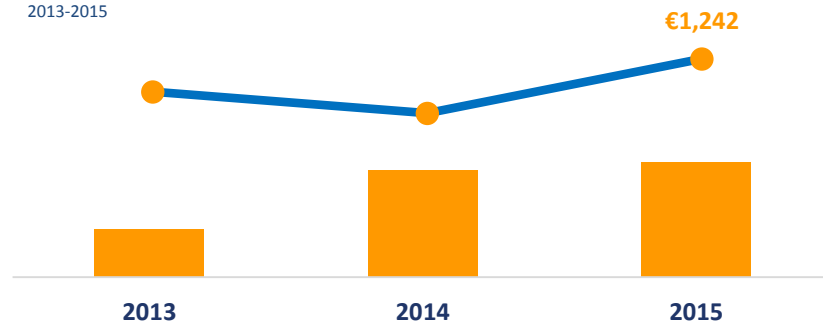
OVERVIEW OF POPULAR SERVICE GROUPS

Online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015





United Kingdom



Population 15+
53.6mn



Internet users
49.8mn (93%)

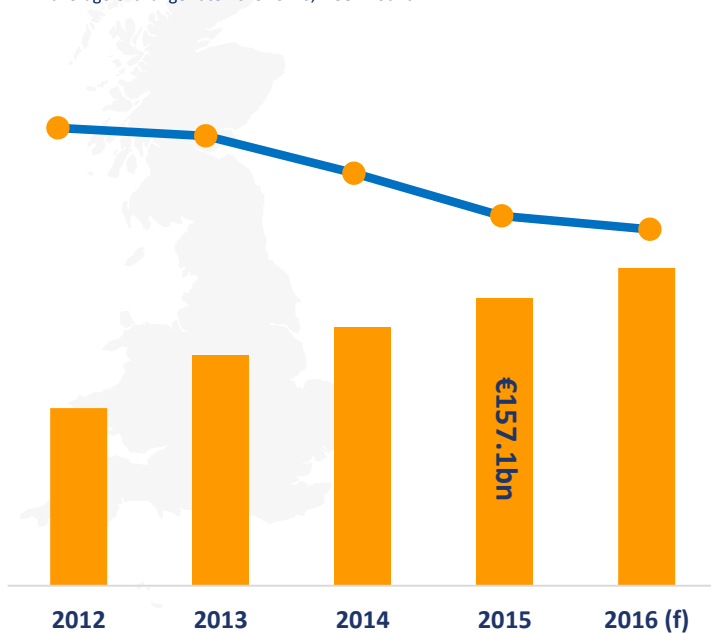


Number of e-shoppers
43.4mn (81%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=0,72584 Pound



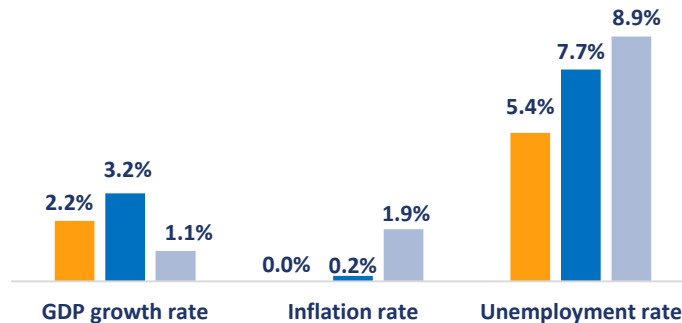
Source: IMRG, Capgemini and Ecommerce Foundation, 2016

E-commerce Markets

Western Europe

UNITED KINGDOM VS REGIONAL AND EUROPEAN AVERAGES

United Kingdom Western Europe Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

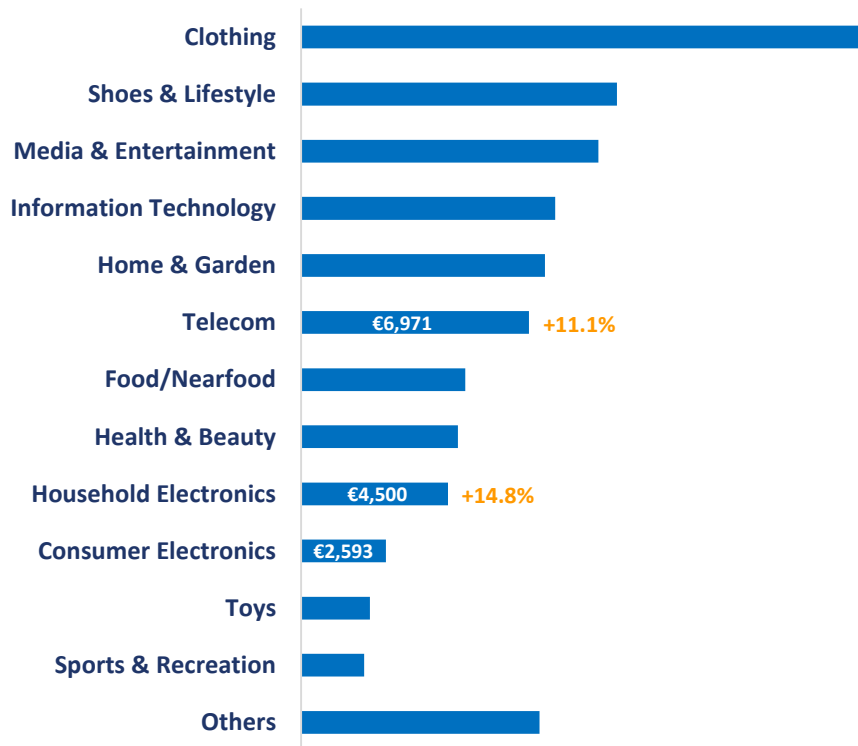
Source: Ecommerce Foundation and Eurostat, 2016



United Kingdom

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



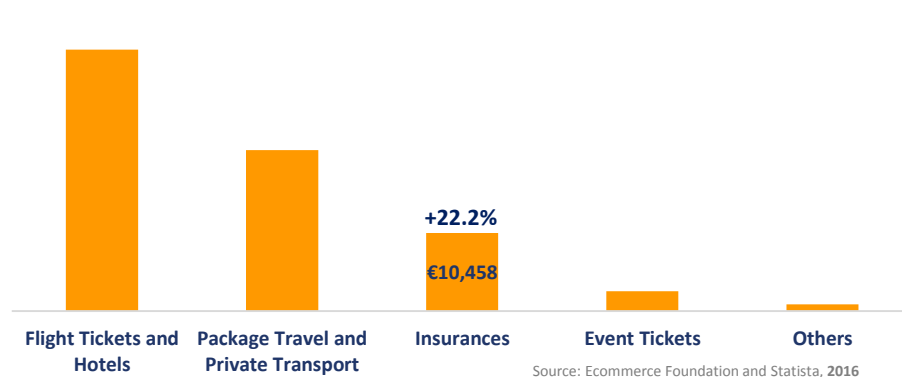
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Western Europe

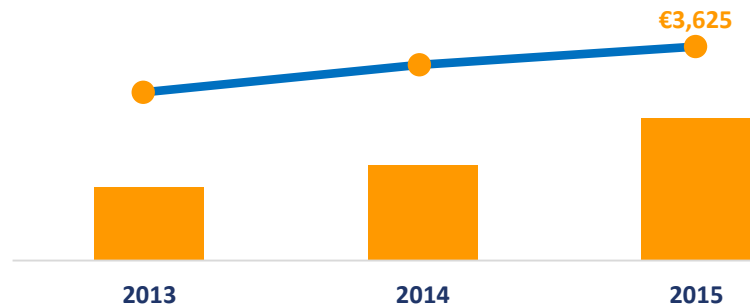
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation, Eurostat, IMRG and Capgemini, 2016



Central Europe

An Overview of B2C E-commerce Markets of Goods & Services in Central Europe



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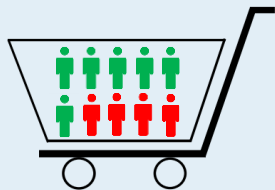
Key B2C E-commerce Data of Goods and Services at a Glance 2015



141mn people are
over the age of 15



117mn people use
the Internet (**83%**)



85mn people are
e-shoppers (**60%**)



Europe €455.3bn +13.3%
Central Europe €89.5 bn +14.2%
Total B2C E-commerce 2015 of goods & services



Forecast 2016

€101bn
Turnover E-commerce
Goods & Services



Total GDP of
€4,792bn



Share of E-commerce
in GDP **1.87%**



Estimated share of **online**
goods in **total retail of**
goods

Ranking Central Europe in turnover (EUR million)

1		Germany	€59,700
2		Switzerland	€8,530
3		Poland	€7,603
4		Austria	€7,500
5		Czechia	€4,293
6		Hungary	€1,120
7		Slovakia	€460
8		Slovenia	€250



National e-commerce associations:



Czechia



Poland



Germany



Switzerland



Hungary



Executed by: Ecommerce
FOUNDATION

In cooperation with: GfK

Powered by:



B2C E-commerce Turnover and Growth

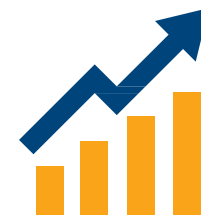
Central Europe

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for a complete overview of European e-commerce](#)

CENTRAL EUROPEAN B2C E-COMMERCE TURNOVER, 2011 - 2016

Countries	2011	2012	Growth	2013	Growth	2014	Growth	2015	Growth	2016 (f)	Growth
Austria						€6,560mn	10.4%	€7,500mn	14.3%		
Czechia								€4,293mn	23.3%		
Germany		€37,000mn						€59,700mn	13.3%		
Hungary				€750mn				€1,120mn	20.4%		
Poland	€3,347mn							€7,603mn	17.8%		
Slovakia					21.5%			€460mn	14.4%		
Slovenia								€250mn	15.7%		
Switzerland								€8,530mn	12.3%	€9,843mn	15.4%
Total								€89,456mn	14.2%		

Source: Ecommerce Foundation, APEK, Heureka.cz, BEVH, Gemius, Ecommerce Polska, Observatory Netcomm Suisse and Statista, 2016



14.2%

Growth of Central
Europe's B2C
e-commerce in 2015



Austria

E-commerce Markets

Central Europe



Population 15+

7.4mn



Internet users

6.3mn (85%)

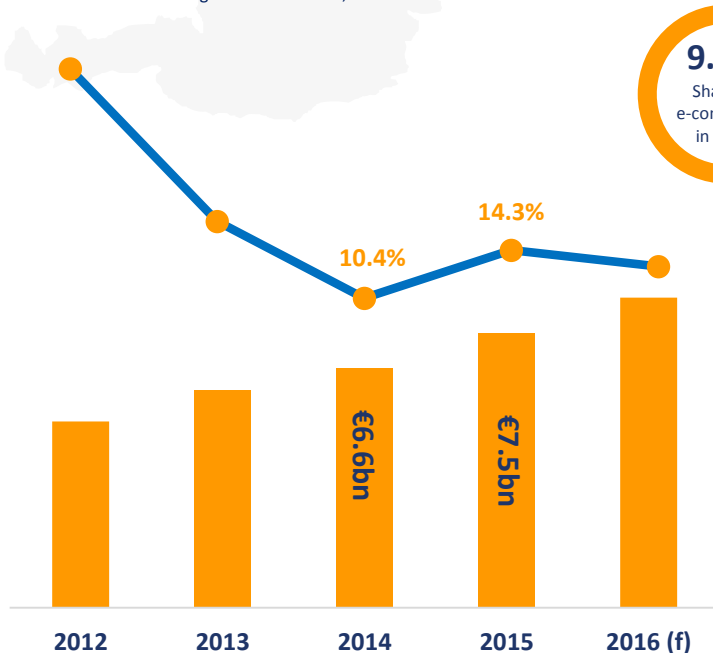


Number of e-shoppers

4.3mn (58%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

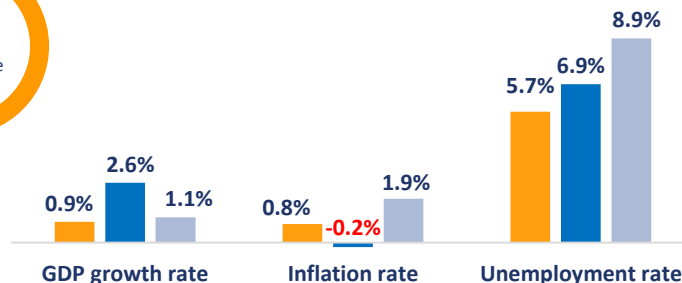
Total online sales of goods and services, 2012-2016



Source: Ecommerce Foundation and Statista, 2016

AUSTRIA VS REGIONAL AND EUROPEAN AVERAGES

■ Austria ■ Central Europe ■ Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



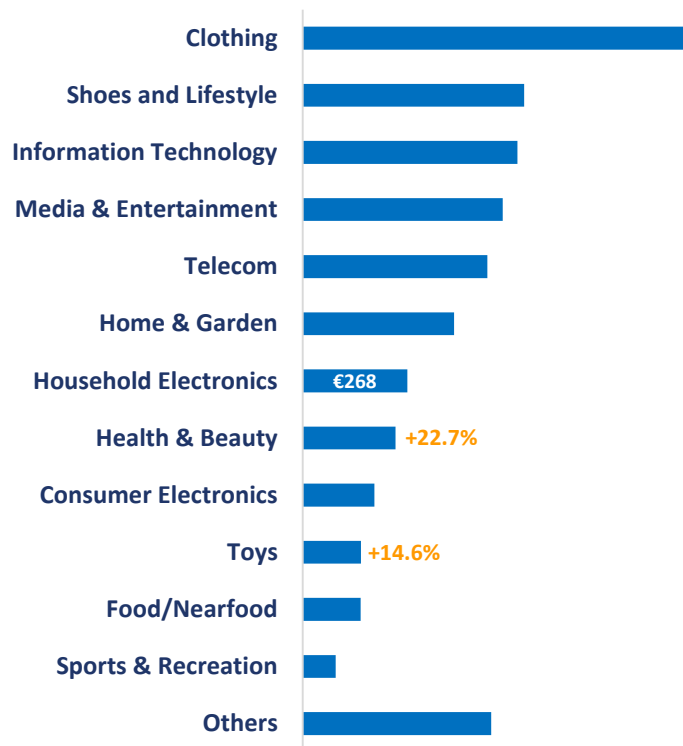
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation and Eurostat, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

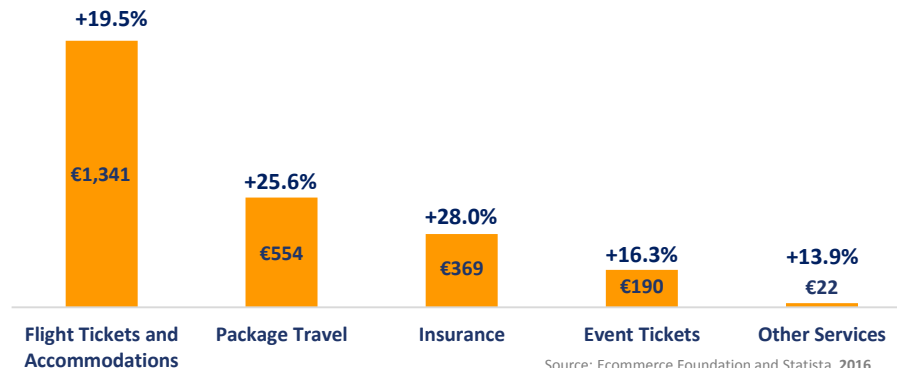
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

OVERVIEW OF POPULAR SERVICE GROUPS

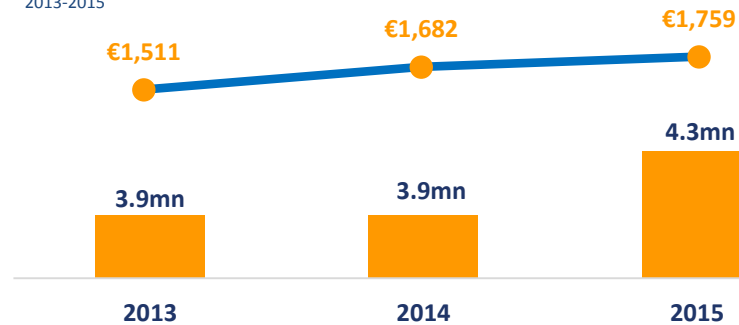
Estimated online sales of popular service groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation, Eurostat and Statista, 2016



Population 15+

9.0mn



Internet users

7.4mn (83%)



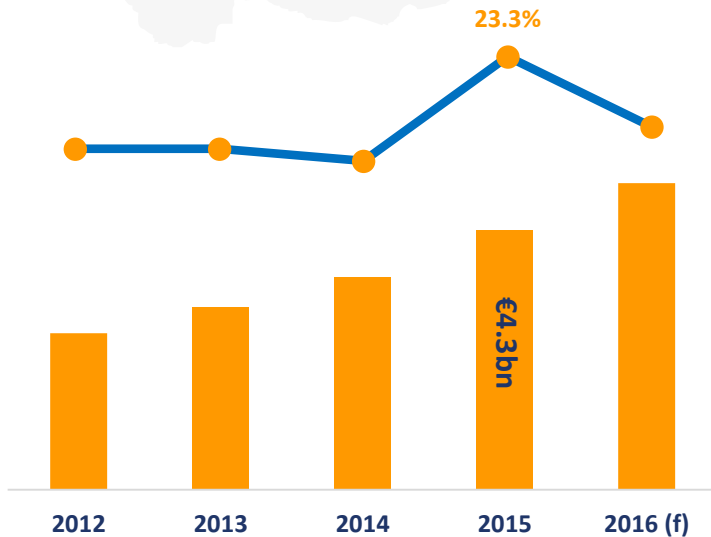
Number of e-shoppers

6.3mn (70%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=27,279 Koruna

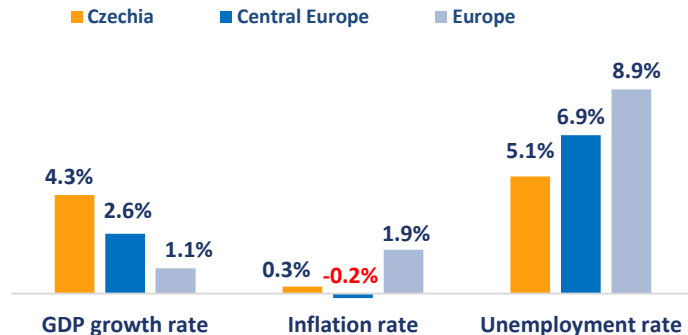


Source: APEK, Heureka.cz and Ecommerce Foundation, 2016

E-commerce Markets

Central Europe

CZECHIA VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING

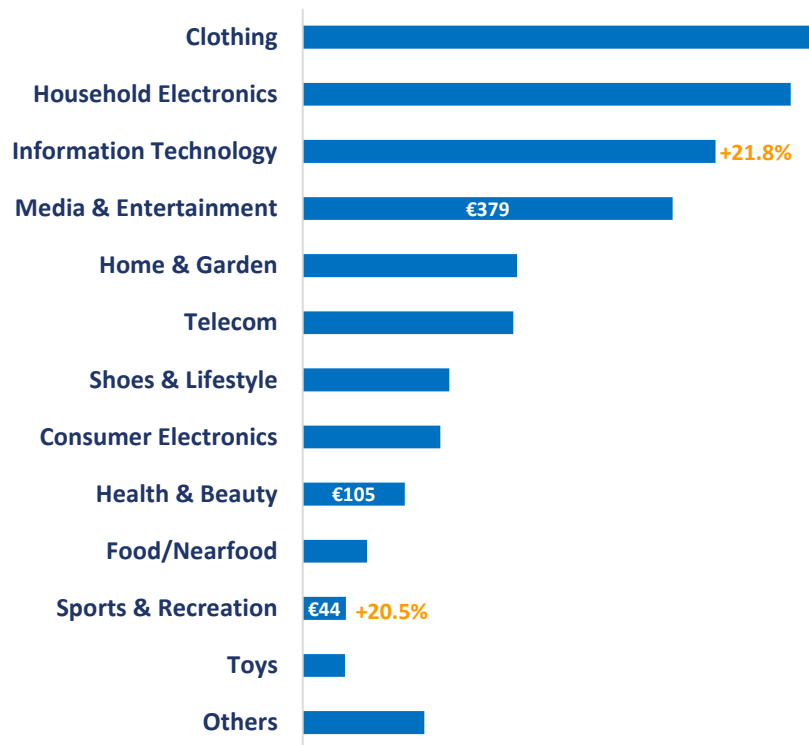


Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: APEK, Heureka.cz, Ecommerce Foundation and Eurostat, 2016

OVERVIEW OF POPULAR PRODUCT GROUPS

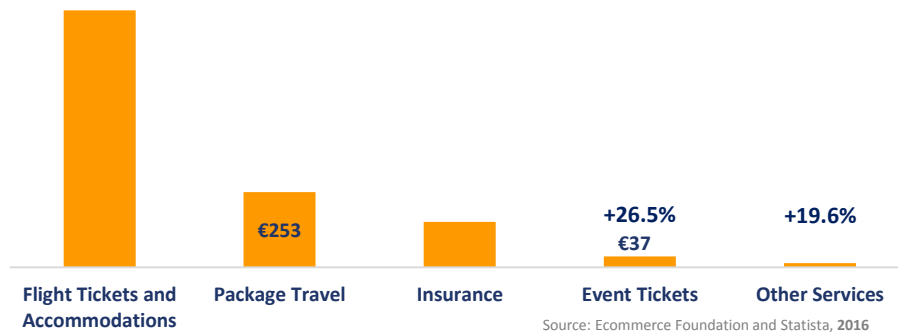
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

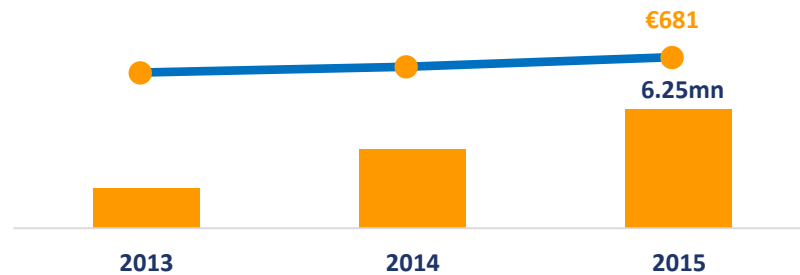
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: APEK, Heureka.cz and Ecommerce Foundation, 2016



Germany



Population 15+
70.7mn



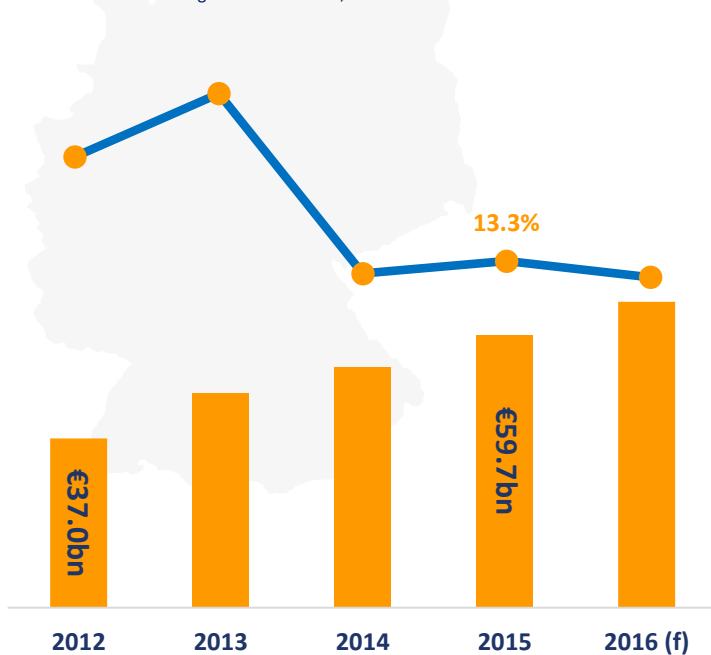
Internet users
63.0mn (89%)



Number of e-shoppers
51.6mn (73%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

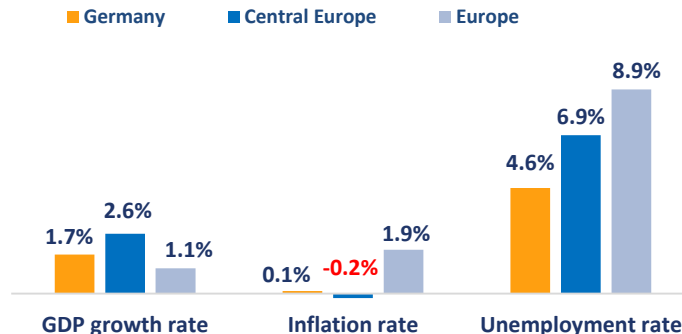


Source: BEVH and Ecommerce Foundation, 2016

E-commerce Markets

Central Europe

GERMANY VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

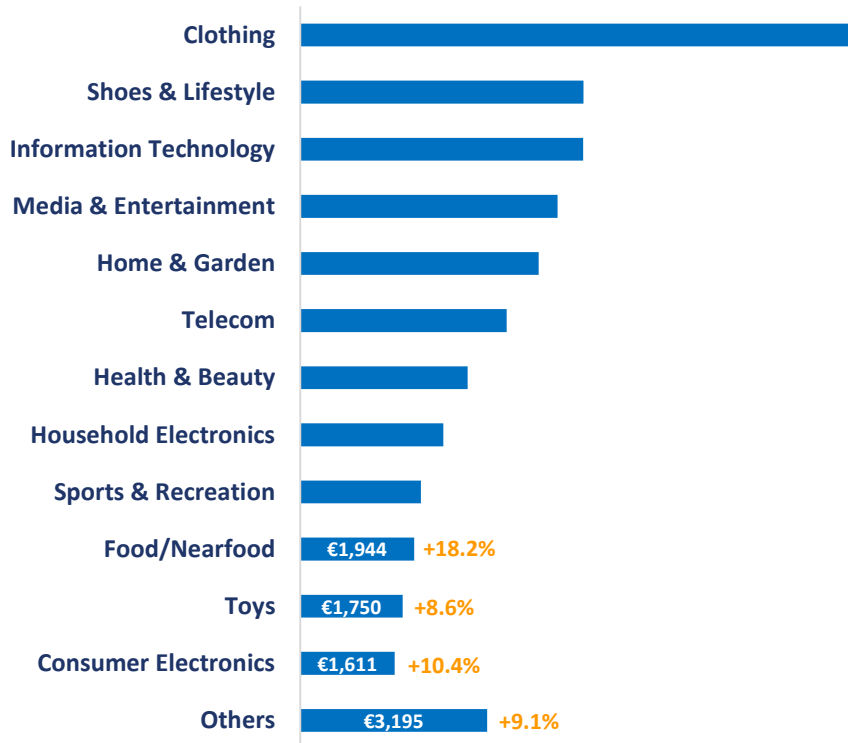
Source: Ecommerce Foundation and Eurostat, 2016



Germany

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



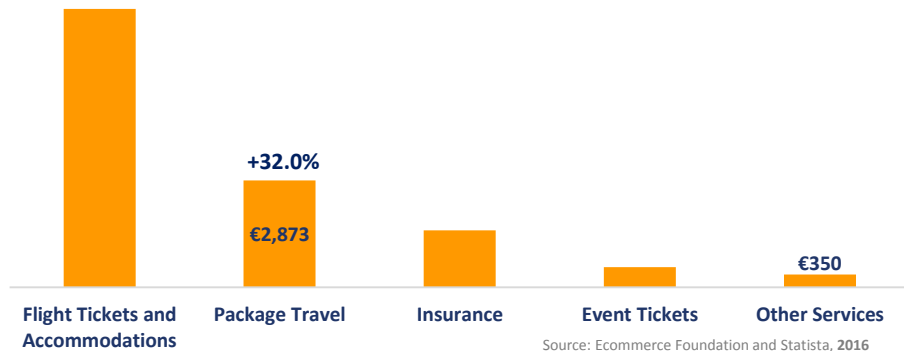
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Central Europe

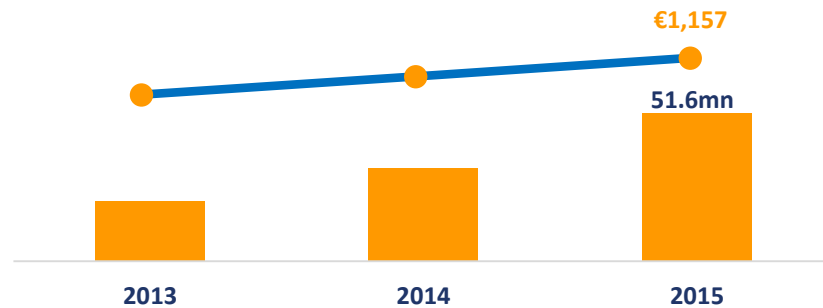
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation, BEVH and Eurostat, 2016



Hungary



Population 15+

8.4mn



Internet users

6.4mn (76%)



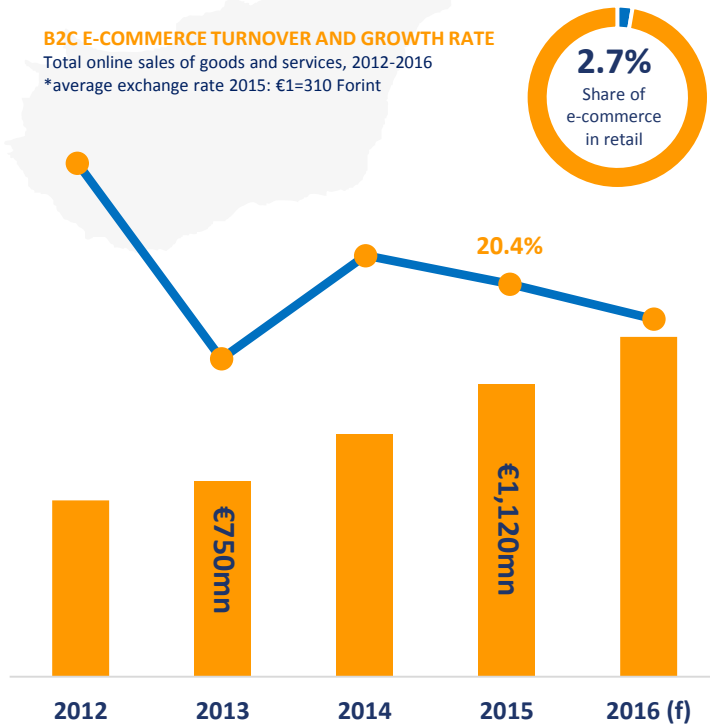
Number of e-shoppers

3.0mn (36%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=310 Forint

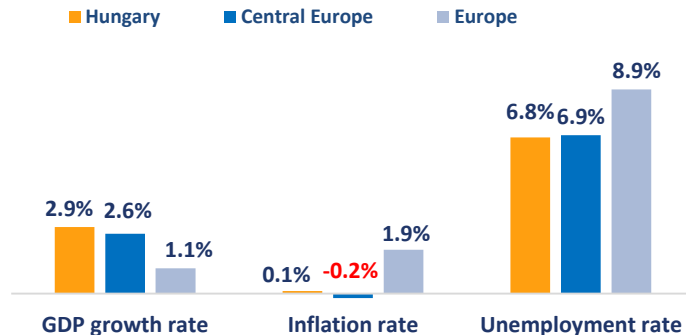


Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Central Europe

HUNGARY VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

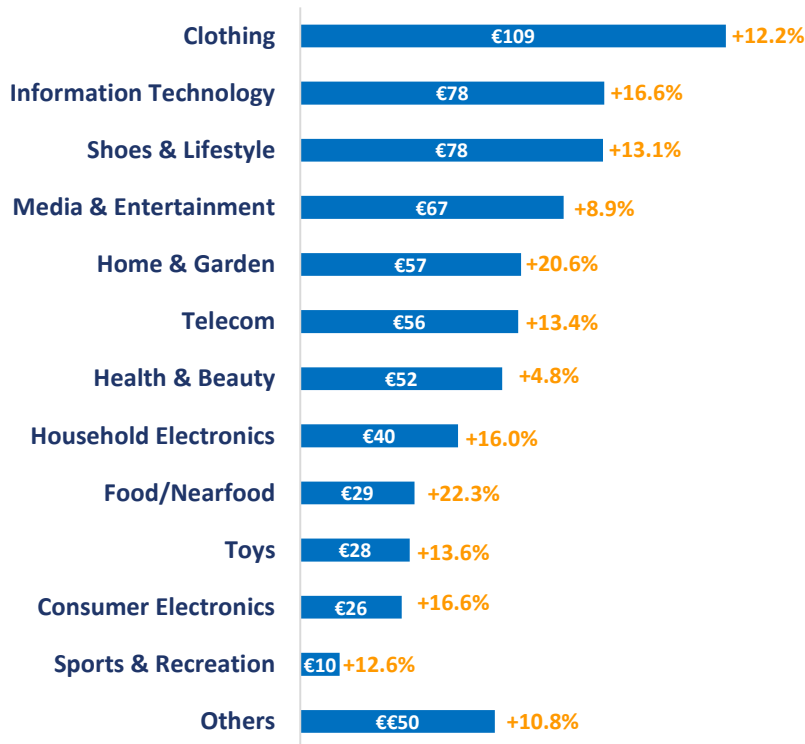
Source: Ecommerce Foundation and Eurostat, 2016



Hungary

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



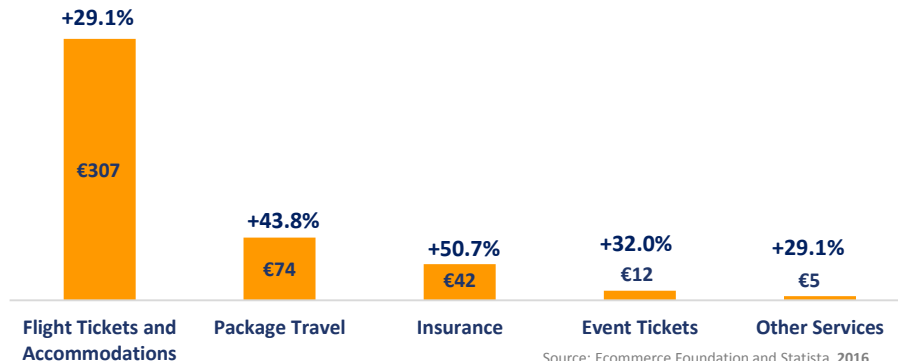
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Central Europe

OVERVIEW OF POPULAR SERVICE GROUPS

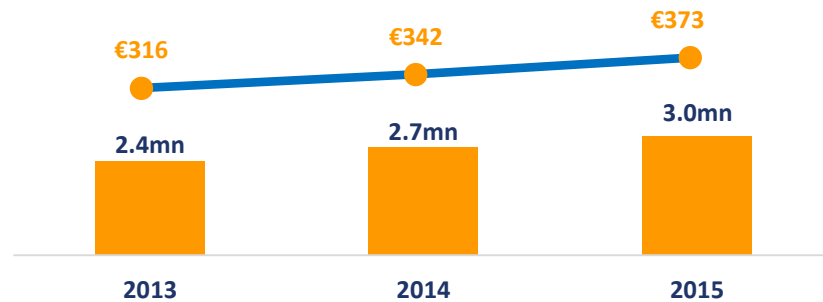
Estimated online sales of popular service groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation and Eurostat, 2016



Poland



Population 15+
32.4mn



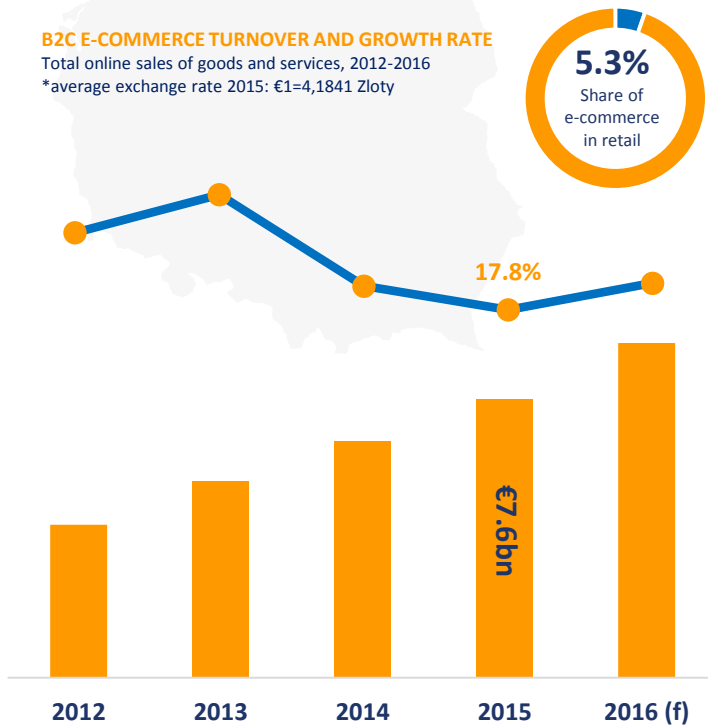
Internet users
22.7mn (70%)



Number of e-shoppers
12.0mn (37%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016
*average exchange rate 2015: €1=4,1841 Zloty

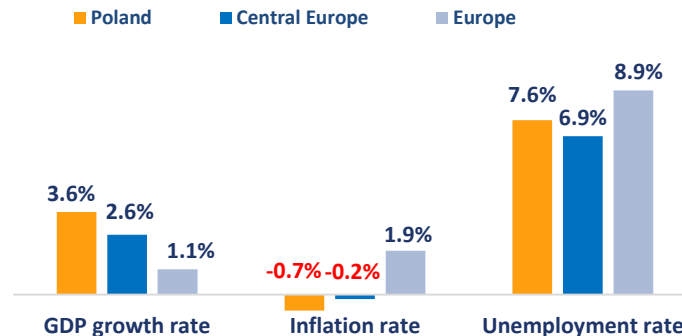


Source: Ecommerce Polska, Gemius and Ecommerce Foundation, 2016

E-commerce Markets

Central Europe

POLAND VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



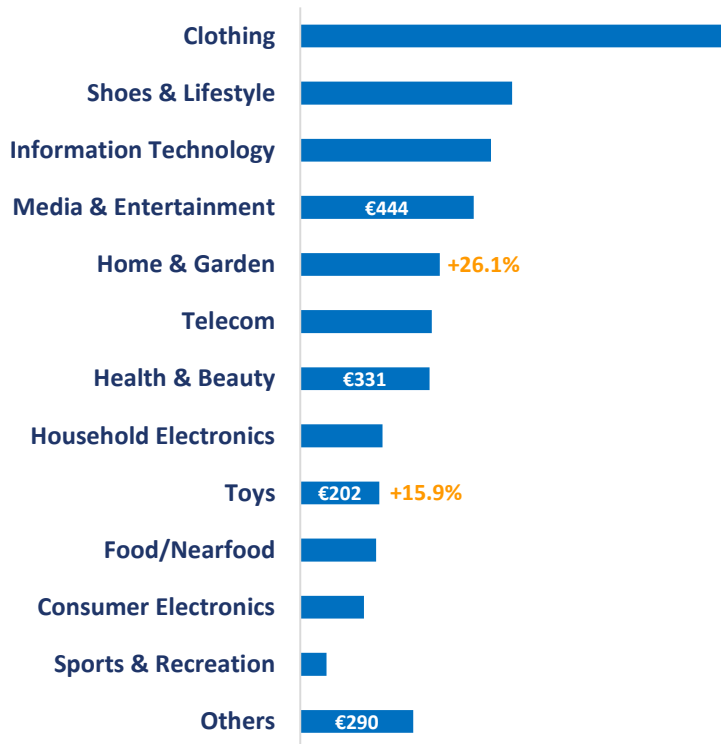
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation and Eurostat, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

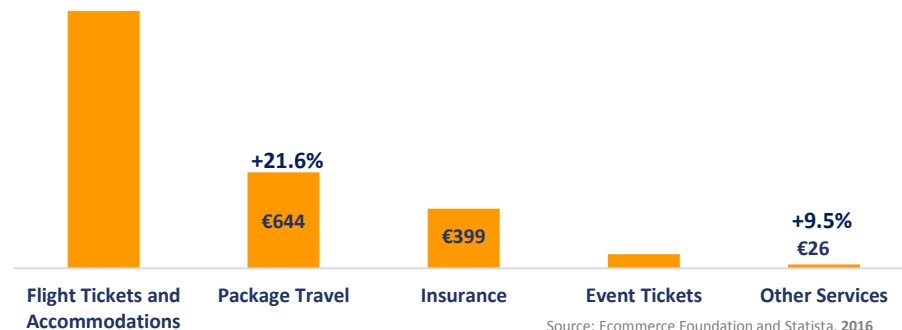
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

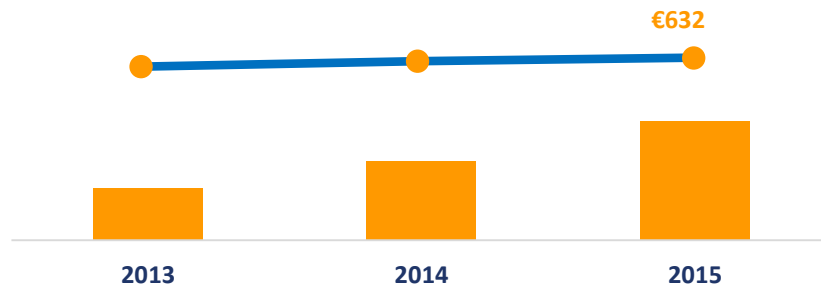
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015





Population 15+

7.0mn



Internet users

6.4mn (92%)



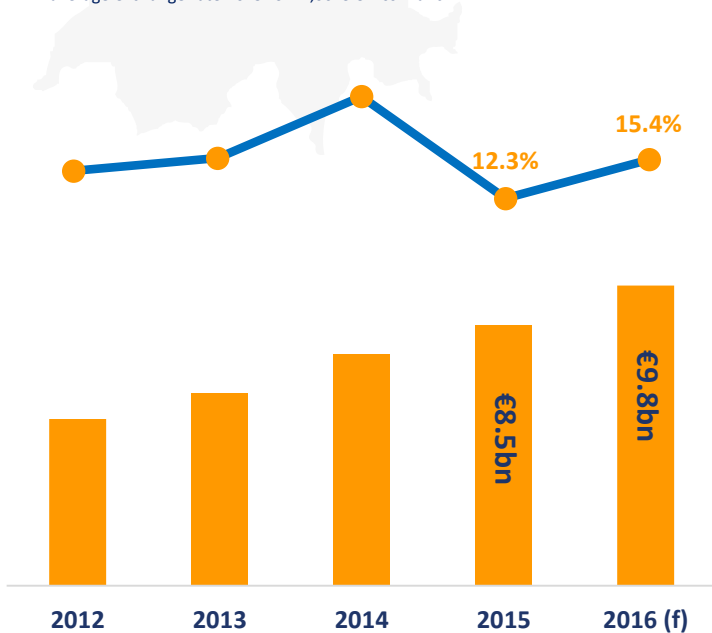
Number of e-shoppers

4.7mn (67%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=1,0679 Swiss Franc

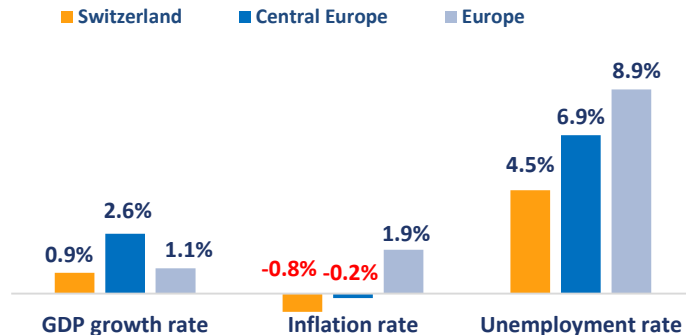


Source: Observatory Netcomm Suisse and Ecommerce Foundation, 2016

E-commerce Markets

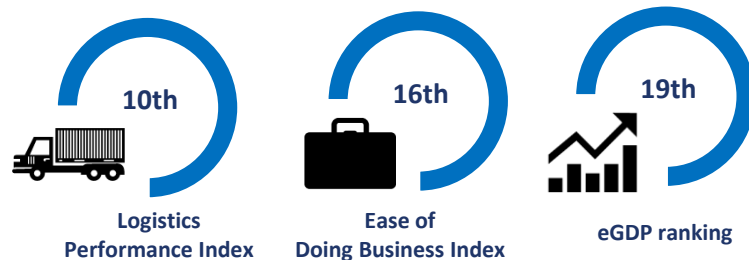
Central Europe

SWITZERLAND VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



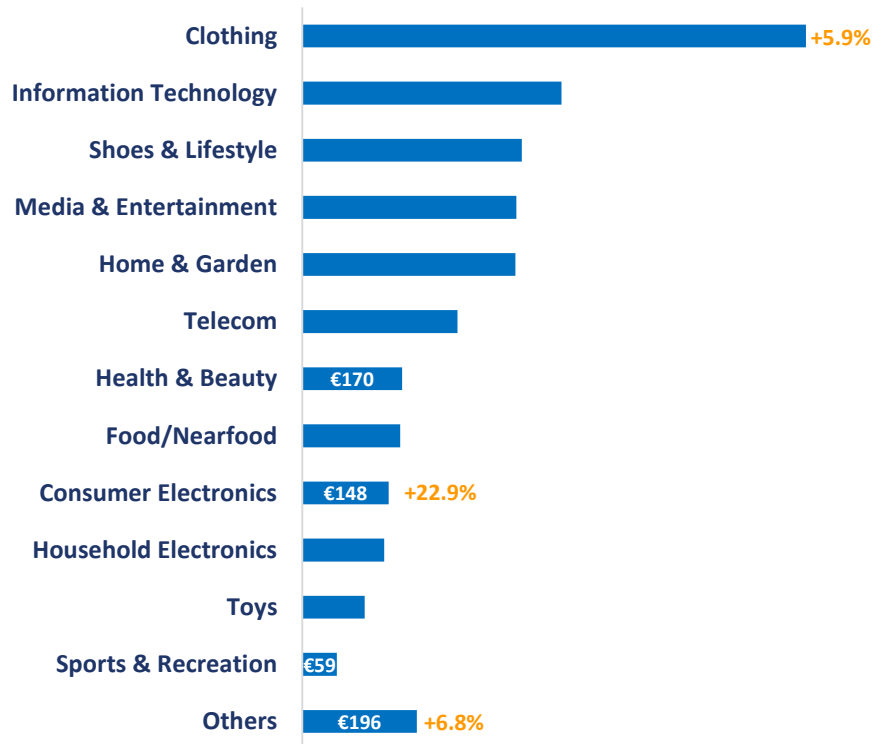
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Observatory Netcomm Suisse, Ecommerce Foundation and Eurostat, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

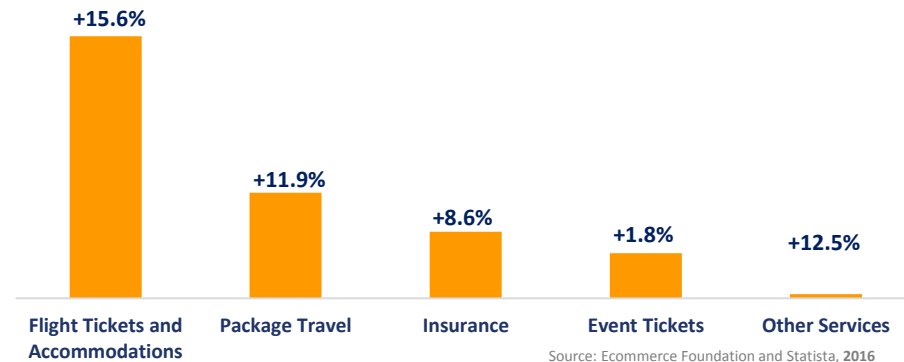
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

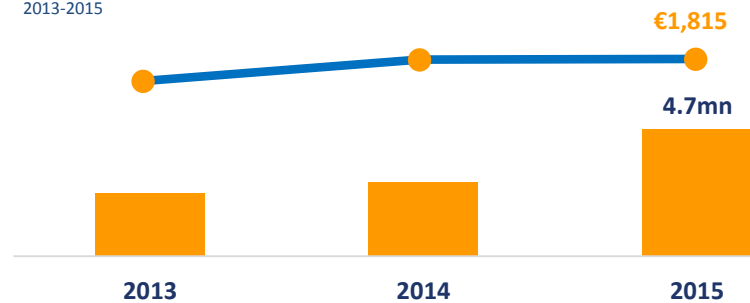
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation and Eurostat, 2016



Southern Europe

An Overview of B2C E-commerce Markets of Goods & Services in Southern Europe



Commissioned by:



Executed by:



Southern Europe

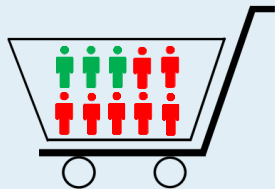
Key B2C E-commerce Data of Goods and Services at a Glance 2015



172mn people are
over the age of 15



114mn people use
the Internet (66%)



51mn people are
e-shoppers (30%)



Average spending
per e-shopper

Forecast 2016

€60bn

Turnover E-commerce
Goods & Services



Total GDP of

€3,795bn



Share of E-commerce
in GDP 1.34%

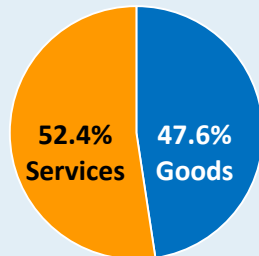


Estimated share of online
goods in total retail of
goods

Europe €455.3bn +13.3%
Southern Europe €50.9bn +18.2%
Total B2C E-commerce 2015 of goods & services

Ranking Southern Europe
in turnover (EUR million)

1		Spain	€18,150
2		Italy	€16,611
3		Turkey	€8,469
4		Greece	€3,800
5		Portugal	€3,334
6		Croatia	€315
7		Cyprus	€200
8		Malta	€30



National e-commerce associations:



Greece



Portugal



Italy



Spain



Executed by: Ecommerce
FOUNDATION

In cooperation with: GfK

Powered by:



B2C E-commerce Turnover and Growth

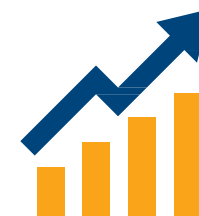
Southern Europe

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the full European B2C E-commerce Report
for a complete overview of European e-commerce](#)

SOUTHERN EUROPEAN B2C E-COMMERCE TURNOVER, 2011 - 2016

Countries	2011	2012	Growth	2013	Growth	2014	Growth	2015	Growth	2016 (f)	Growth
Croatia						€280mn	16.7%	€315mn	12.5%		
Cyprus							21.4%	€200mn	17.6%		
Greece								€3,800mn	18.8%	€4,200mn	10.5%
Italy								€16,611mn	15.6%		
Malta					25.0%			€30mn	9.1%		
Portugal		€2,369mn						€3,334mn	15.9%		
Spain				€14,610mn				€18,150mn	11.6%		
Turkey	€2,557mn							€8,469mn	34.9%		
Total								€47,251mn	17.1%		

Source: Ecommerce Foundation, GRECA, Netcomm, ACEPI, ONTSI and ETID, 2016



17.1%

Growth of Southern
Europe's B2C
e-commerce in 2015



Greece



Population 15+

9.3mn



Internet users

6.3mn (68%)

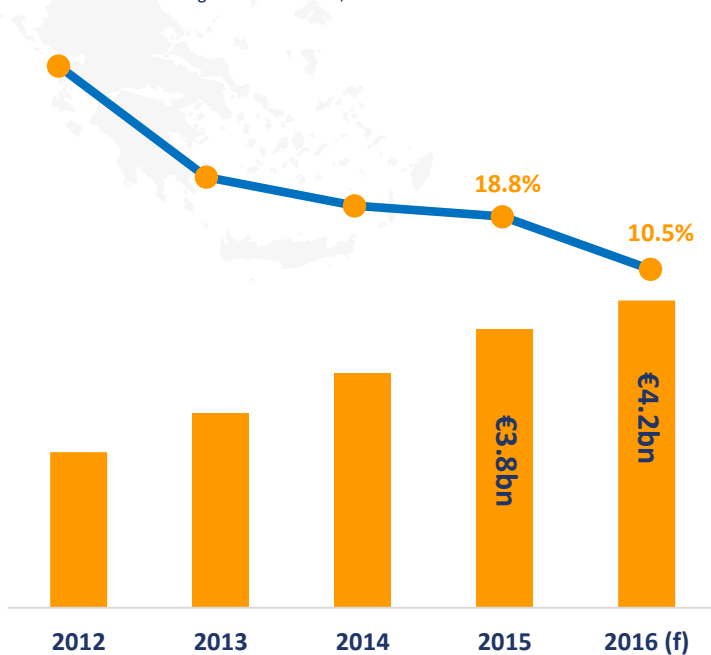


Number of e-shoppers

3.0mn (32%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016



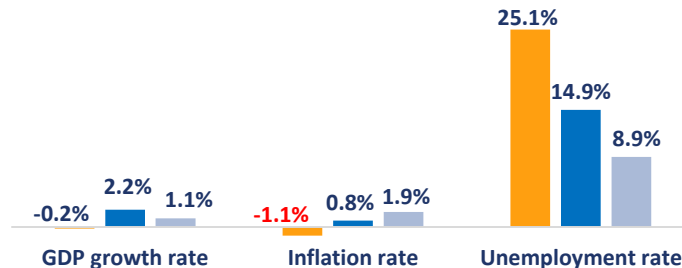
Source: GRECA and Ecommerce Foundation, 2016

E-commerce Markets

Southern Europe

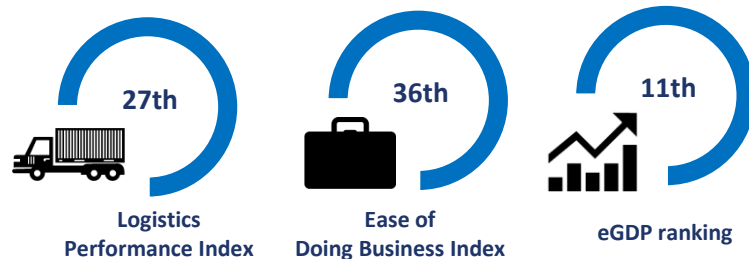
GREECE VS REGIONAL AND EUROPEAN AVERAGES

■ Greece ■ Southern Europe ■ Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation and Eurostat, 2016







Population 15+
52.5mn



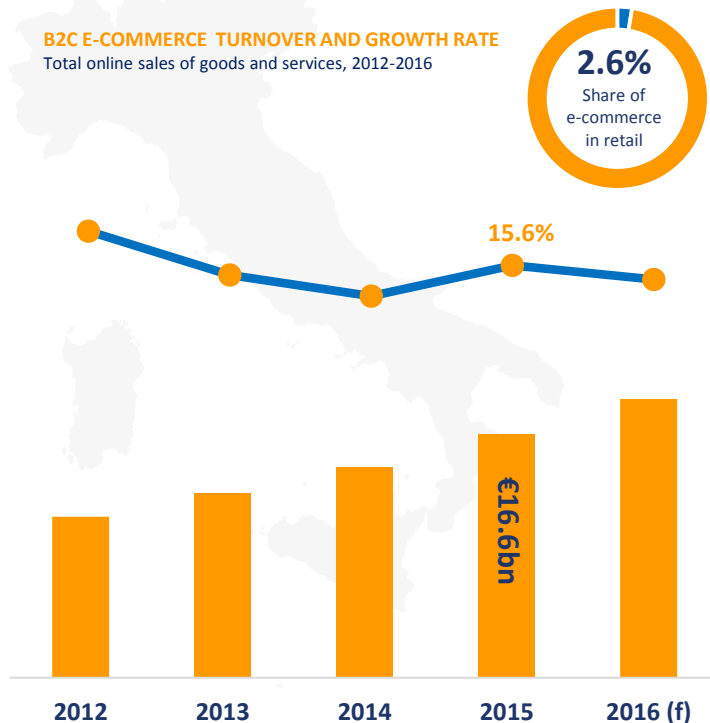
Internet users
35.7mn (68%)



Number of e-shoppers
17.7mn (34%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

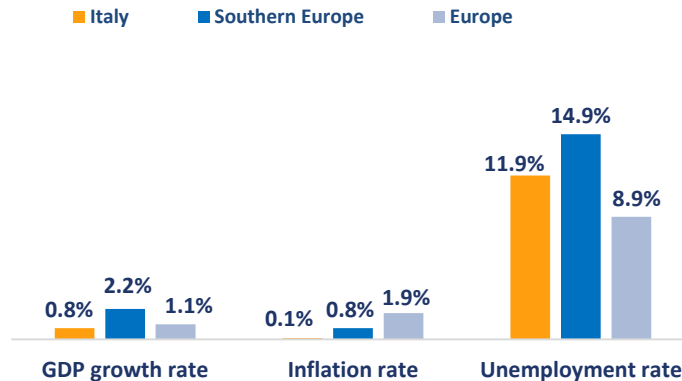


Source: Netcomm and Ecommerce Foundation, 2016

E-commerce Markets

Southern Europe

ITALY VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



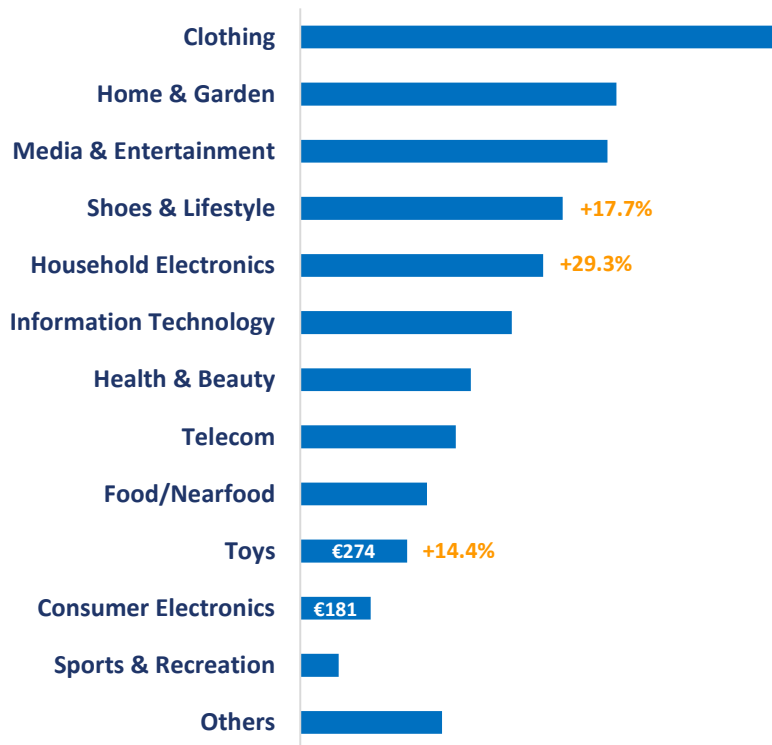
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Netcomm, Ecommerce Foundation and Eurostat, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

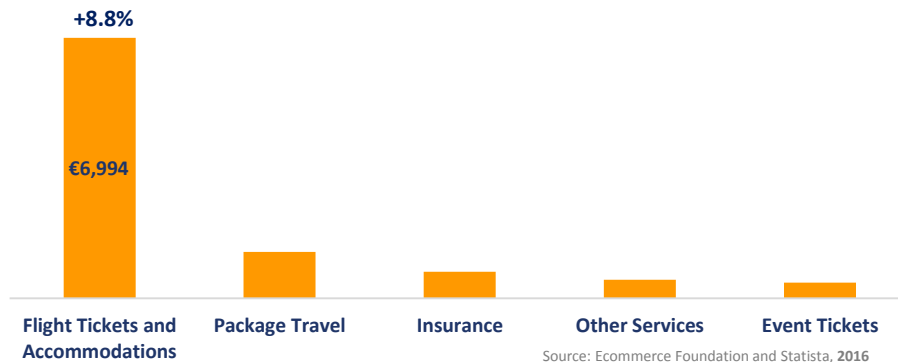
Estimated online sales of popular product groups, in millions of euros, 2015



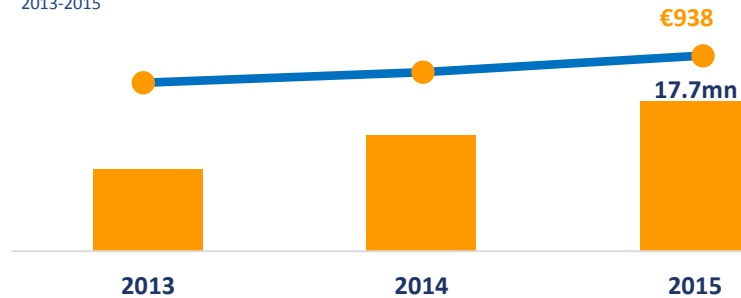
Source: Ecommerce Foundation and Statista, 2016

OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER 2013-2015



Source: Netcomm and Ecommerce Foundation, 2016



Portugal



Population 15+

8.7mn



Internet users

6.1mn (70%)

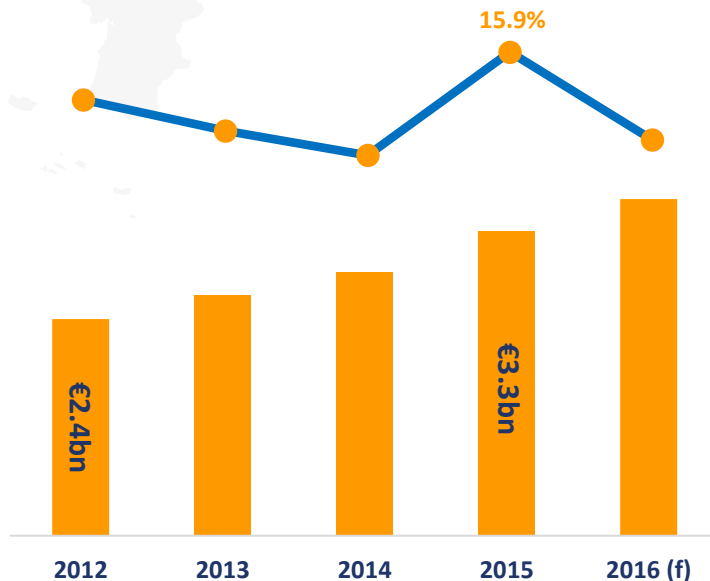


Number of e-shoppers

3.1mn (35%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

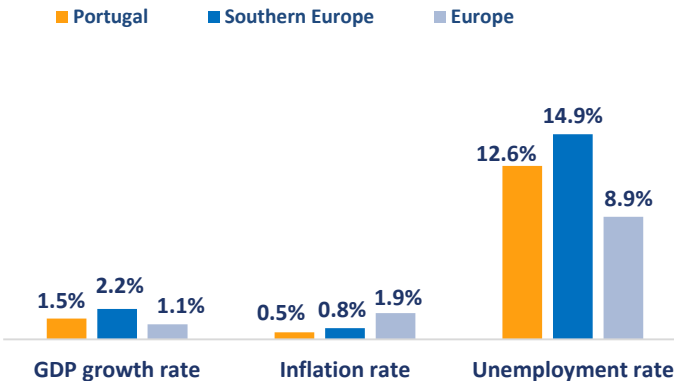


Source: ACEPI and Ecommerce Foundation, 2016

E-commerce Markets

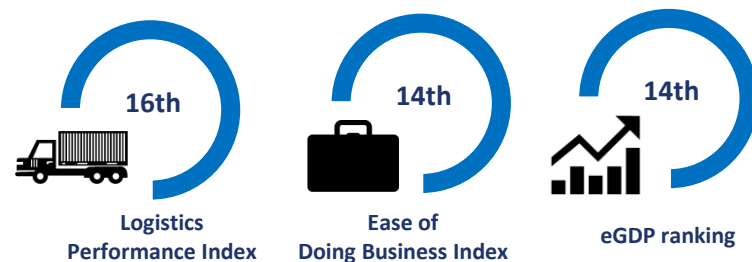
Southern Europe

PORTUGAL VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

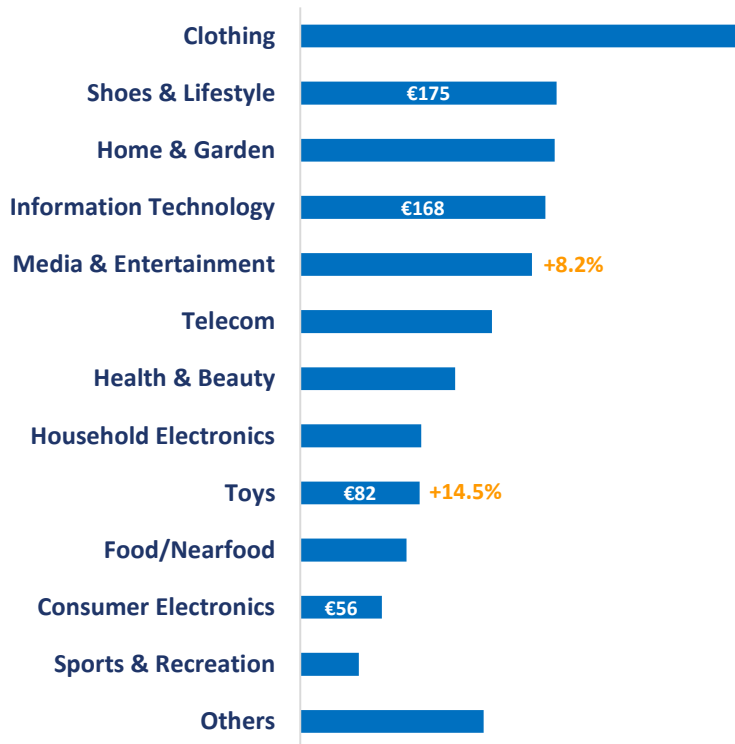
Source: ACEPI, Ecommerce Foundation and Eurostat, 2016



Portugal

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



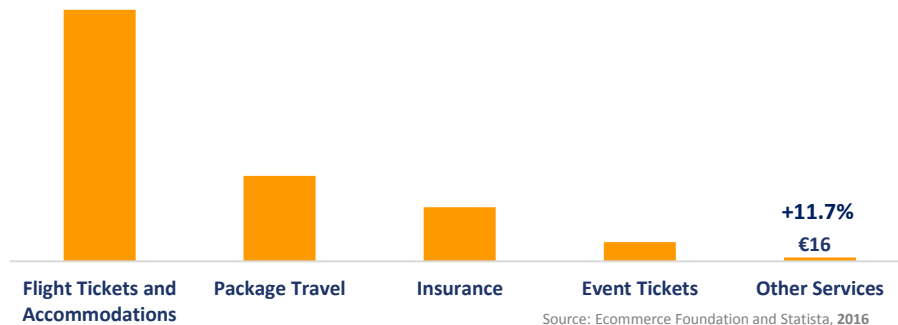
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Southern Europe

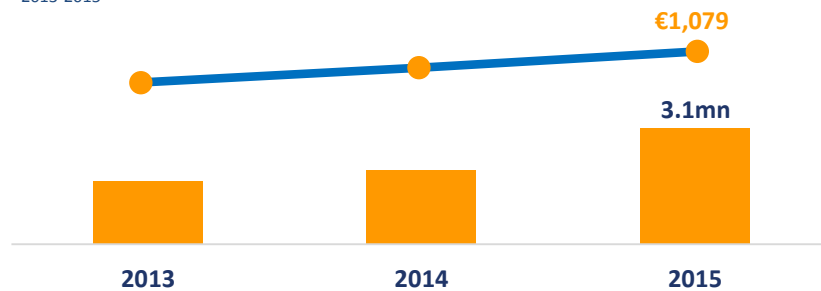
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015





Spain



Population 15+
39.3mn



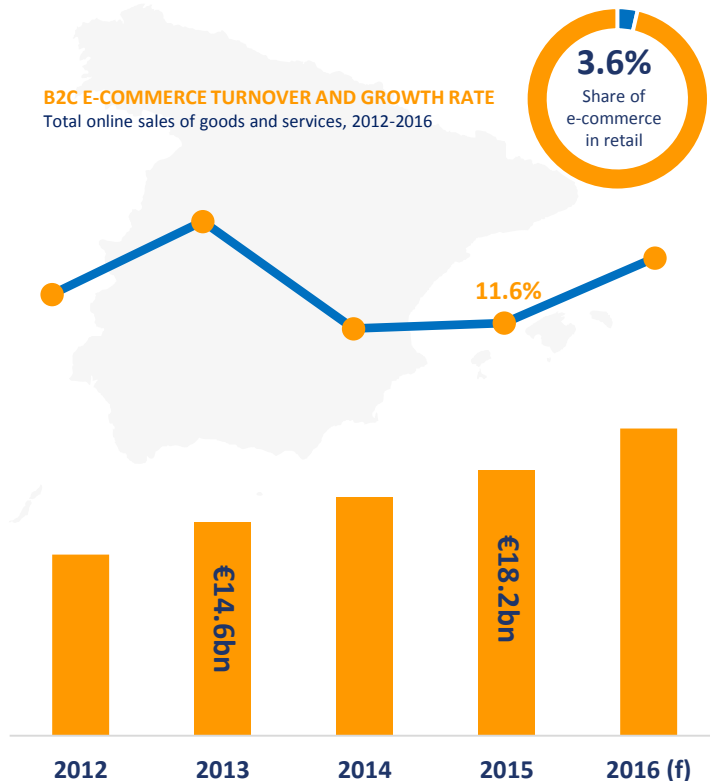
Internet users
31.4mn (80%)



Number of e-shoppers
16.6mn (42%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

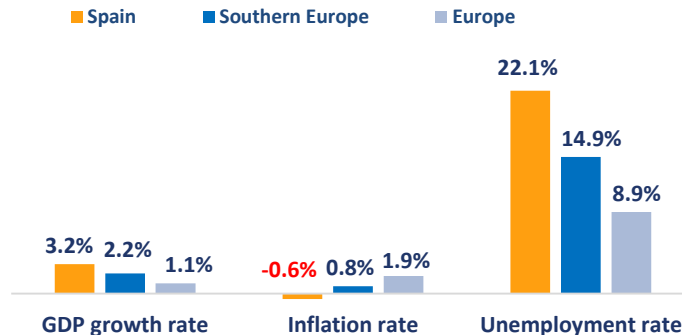


Source: ONTSI, Ecommerce Foundation and Statista, 2016

E-commerce Markets

Southern Europe

SPAIN VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

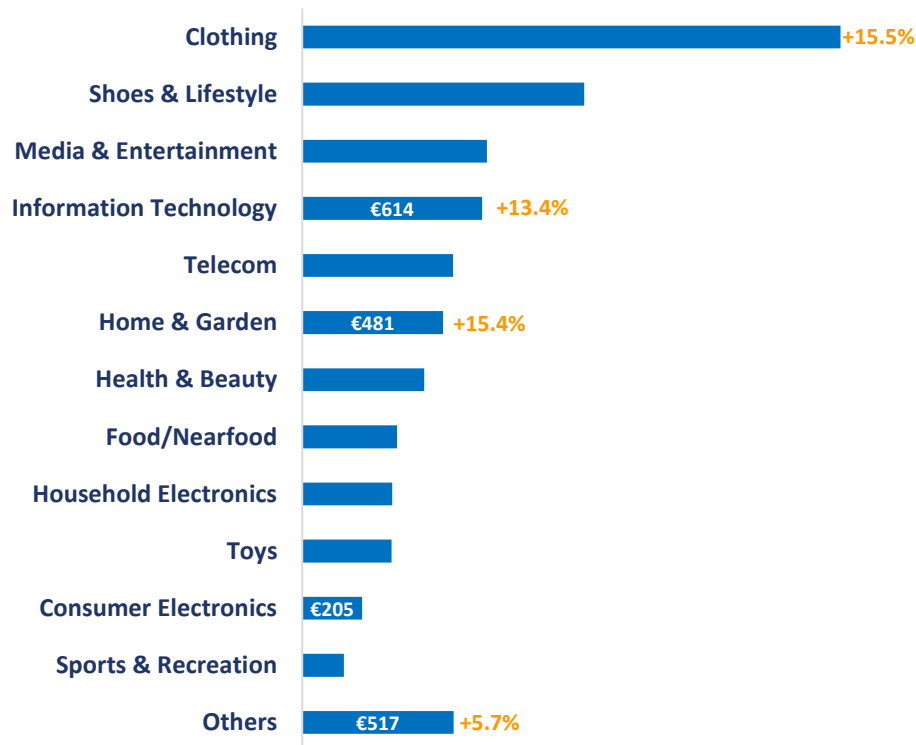
Source: Ecommerce Foundation and Eurostat, 2016



Spain

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



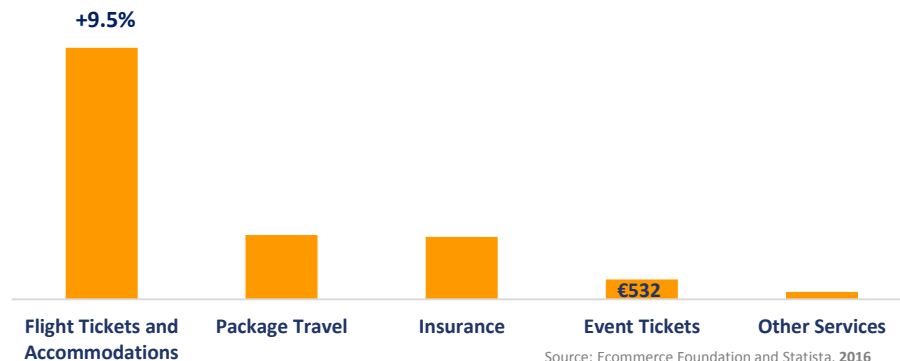
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Southern Europe

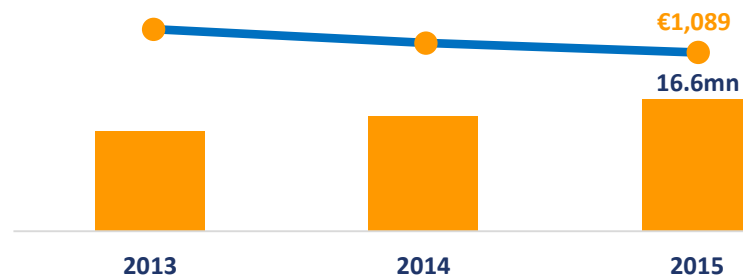
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: ONTSI, Ecommerce Foundation and Eurostat, 2016



Population 15+

57.9mn



Internet users

31.3mn (54%)



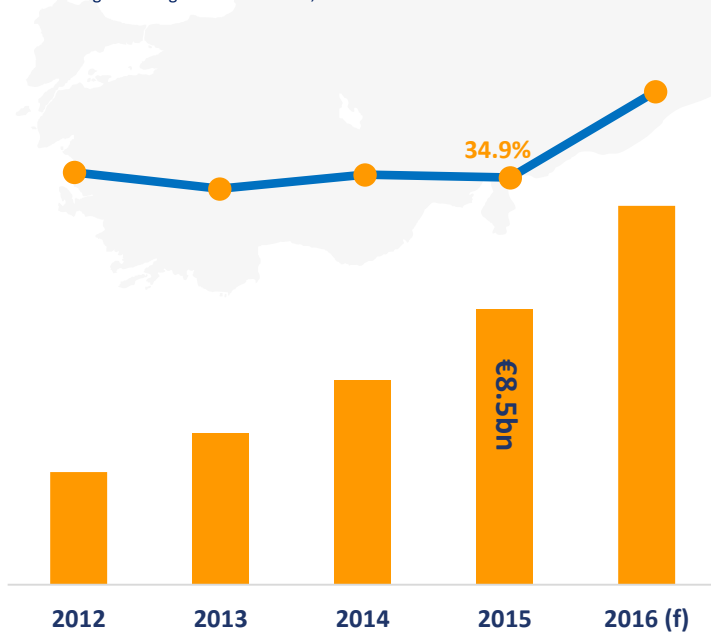
Number of e-shoppers

9.1mn (16%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=3,0255 Lira



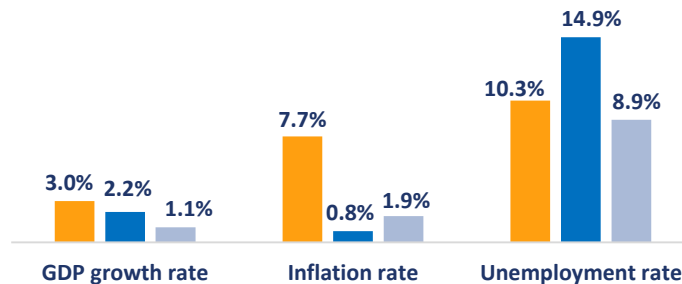
Source: ETID and Ecommerce Foundation, 2016

TURKEY VS REGIONAL AND EUROPEAN AVERAGES

■ Turkey

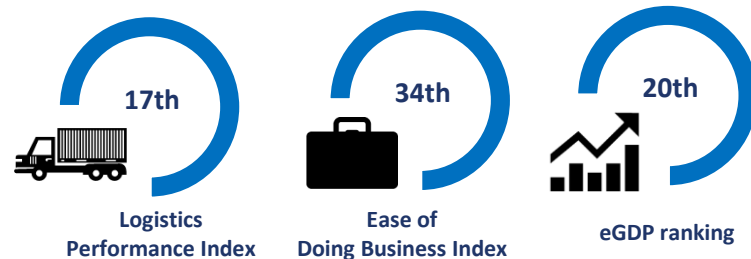
■ Southern Europe

■ Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



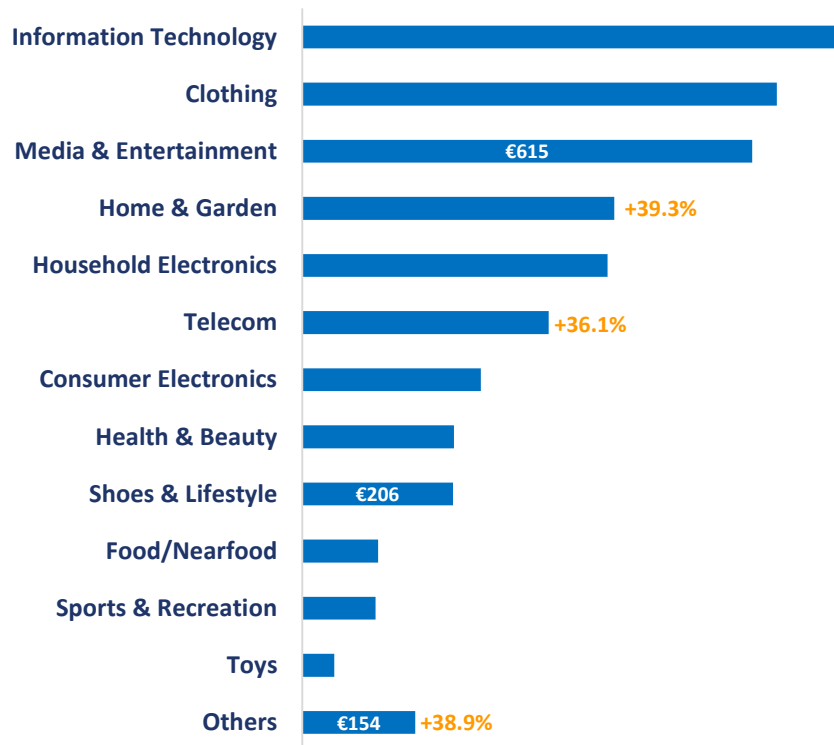
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016



Turkey

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



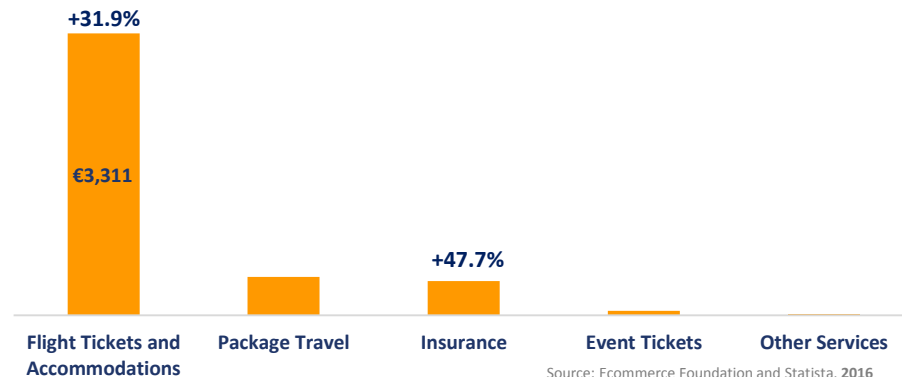
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Southern Europe

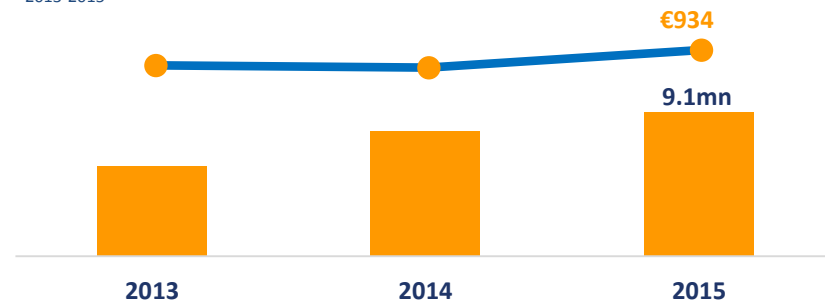
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: ETID, Ecommerce Foundation and Eurostat, 2016



Northern Europe

An Overview of B2C E-commerce Markets of Goods & Services in Northern Europe



Commissioned by:



Executed by:



Northern Europe

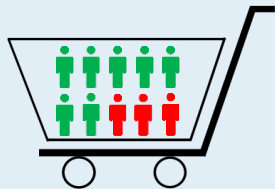
Key B2C E-commerce Data of Goods and Services at a Glance 2015



27mn people are
over the age of 15



25mn people use
the Internet (91%)



18mn people are
e-shoppers (67%)



Forecast 2016

€42bn

Turnover E-commerce
Goods & Services

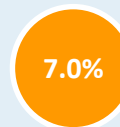


Total GDP of

€1,366bn



Share of E-commerce
in GDP **2.75%**



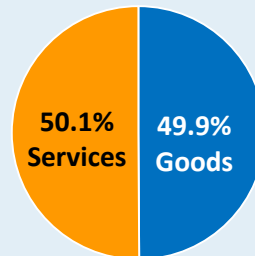
Estimated share of **online**
goods in **total retail** of
goods

Europe €455.3bn +13.3%
Northern Europe €37.6bn +10.9%
Total B2C E-commerce 2015 of goods & services

Ranking Northern Europe
in turnover (EUR million)

1		Denmark*	€11,651
2		Sweden	€9,674
3		Norway	€7,897
4		Finland	€7,221
5		Lithuania	€460
6		Iceland	€270
7		Latvia	€220
8		Estonia	€170

*Domestic and foreign consumption



National e-commerce associations:



Executed by:

In cooperation with:

Powered by:



B2C E-commerce Turnover and Growth

Northern Europe

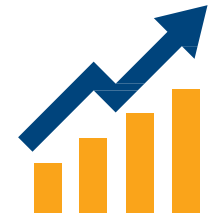
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the full European B2C E-commerce Report
for a complete overview of European e-commerce**

NORTHERN EUROPEAN E-COMMERCE TURNOVER, 2011 - 2016

Countries	2011	2012	Growth	2013	Growth	2014	Growth	2015	Growth	2016 (f)	Growth
Denmark*								€11,651mn	17.9%		
Estonia	€75mn							€170mn	13.3%		
Finland	€5,439mn							€7,221mn	9.6%		
Iceland		€200mn						€270mn	8.0%		
Latvia				€180mn				€220mn	10.0%		
Lithuania			20.0%	€360mn				€460mn	12.2%		
Norway						€7,761mn		€7,897mn	1.7%		
Sweden								€9,674mn	12.0%		
Total								€37,563mn	10.9%		

Source: Ecommerce Foundation, FDIH, TNS Gallup, Virke eHandel, DIBS and Statista, 2016

* Domestic and foreign consumption



10.9%

Growth of Northern Europe's B2C e-commerce in 2015

Population 15+

4.7mn



4.6mn (97%)



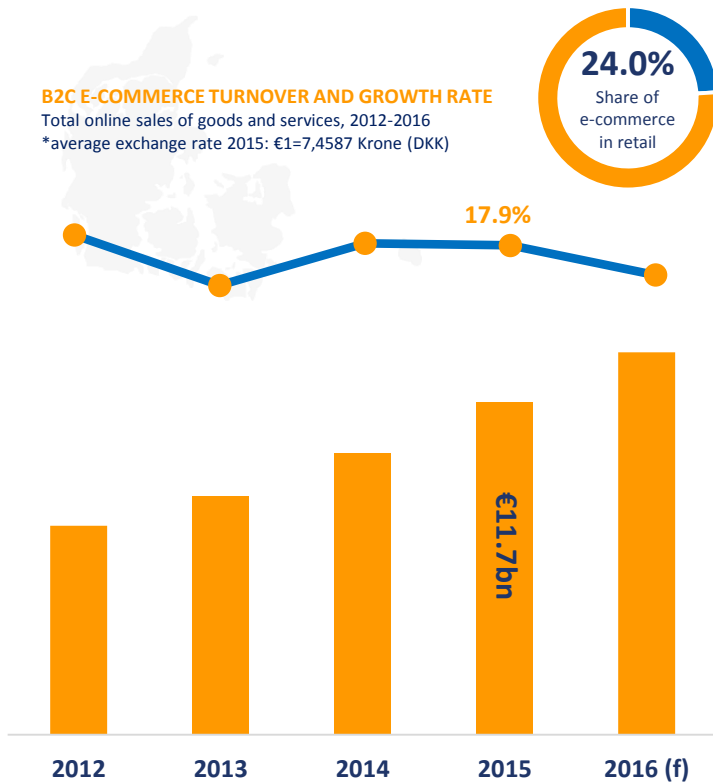
3.7mn (80%)

Source: Ecommerce Foundation and Eurostat, 2016

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=7,4587 Krone (DKK)



Source: FDIH and Ecommerce Foundation, 2016

E-commerce Markets

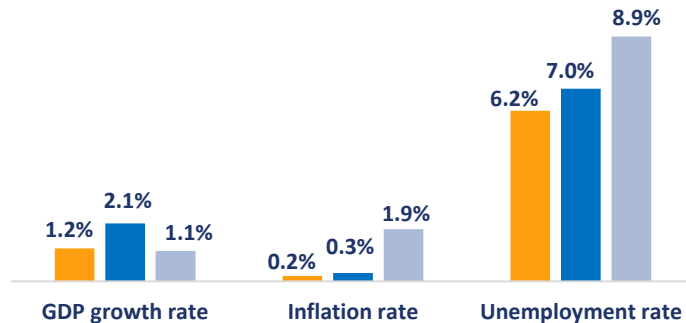
Northern Europe

DENMARK VS REGIONAL AND EUROPEAN AVERAGES

■ Denmark

■ Northern Europe

■ Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING

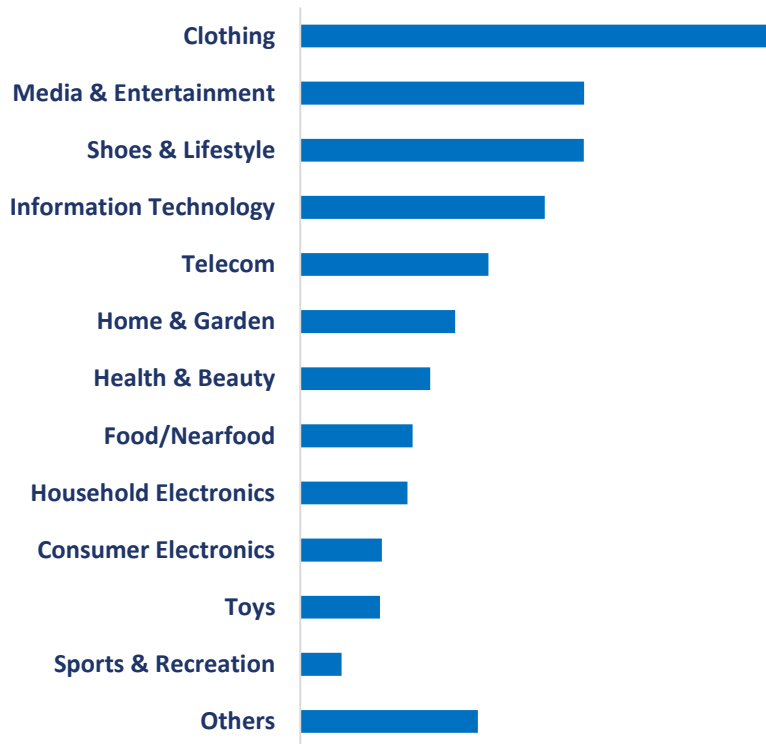


Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

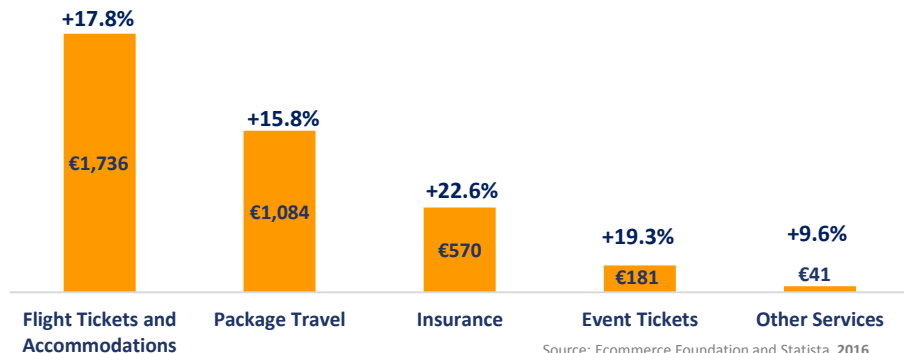
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

OVERVIEW OF POPULAR SERVICE GROUPS

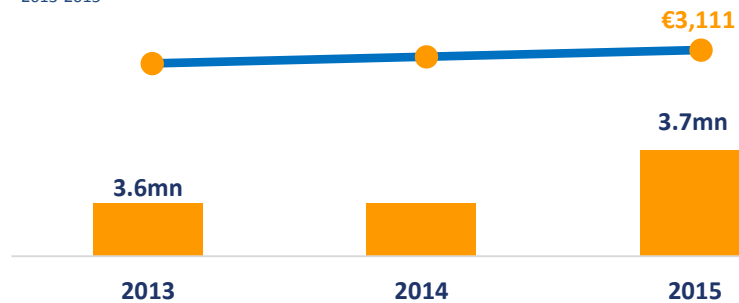
Estimated online sales of popular service groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: FDH, Ecommerce Foundation and Eurostat, 2016



Population 15+
4.6mn



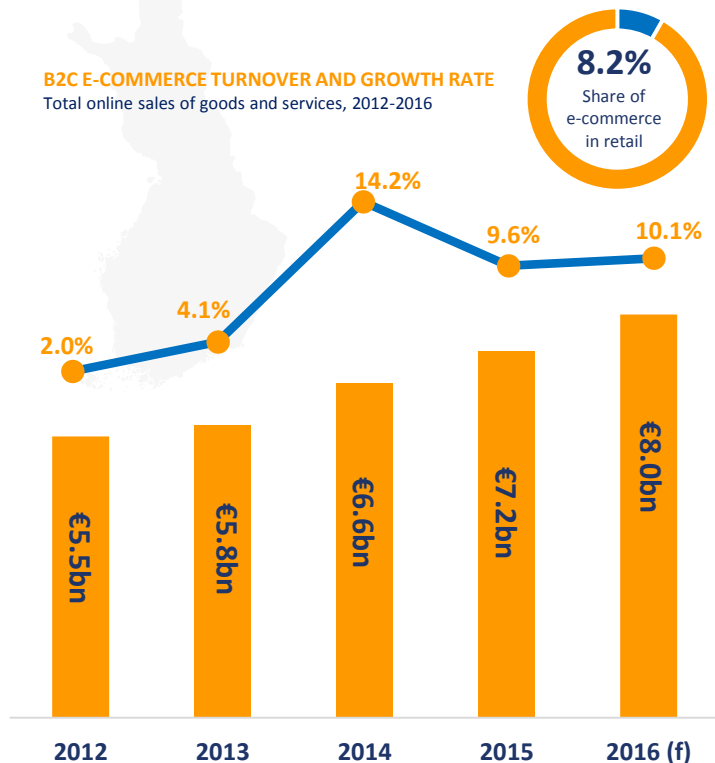
Internet users
4.3mn (93%)



Number of e-shoppers
3.3mn (78%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016



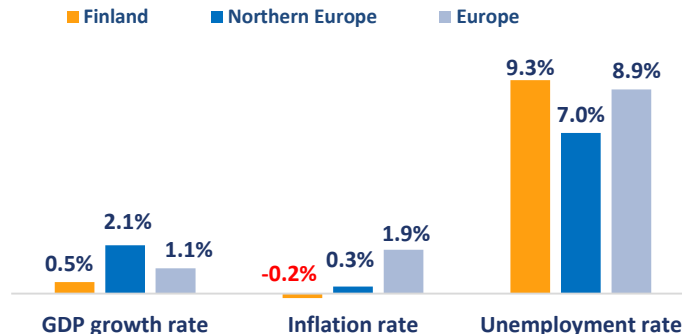
Source: TNS Gallup and Ecommerce Foundation, 2016

Source: Ecommerce Foundation, Eurostat and TNS Gallup, 2016

E-commerce Markets

Northern Europe

FINLAND VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

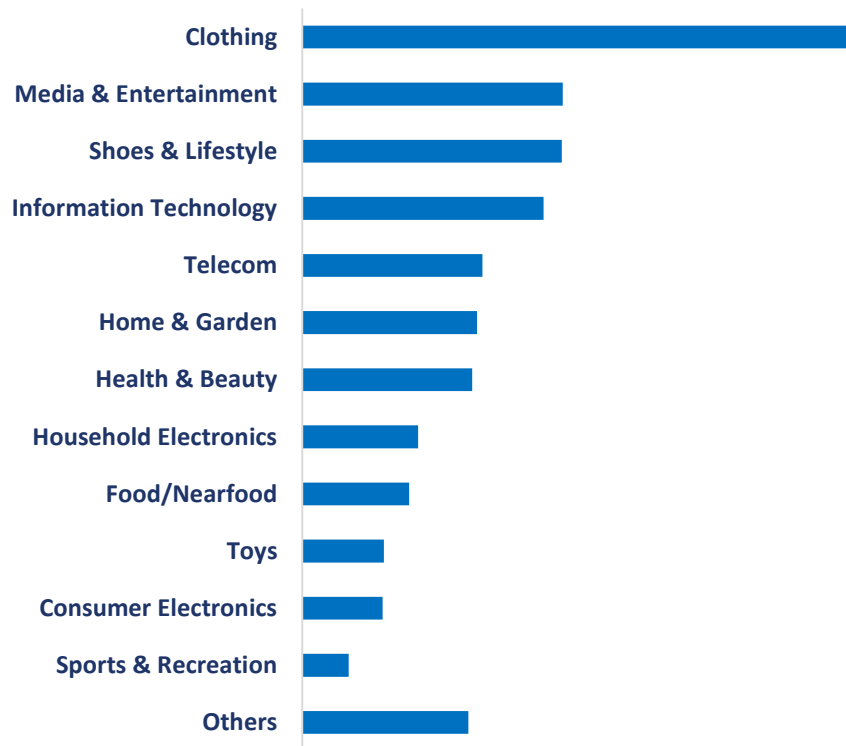
EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

OVERVIEW OF POPULAR PRODUCT GROUPS

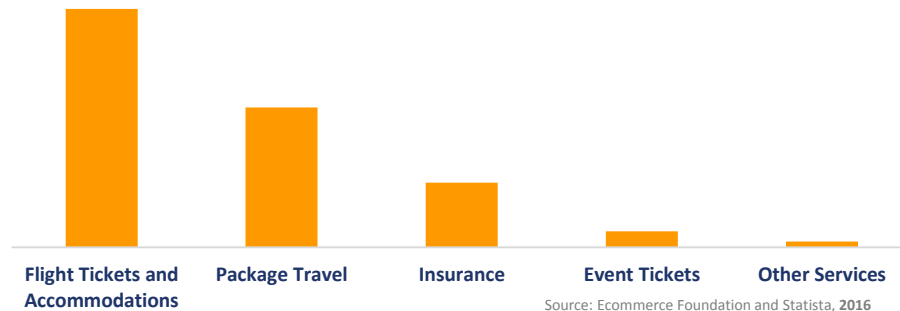
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

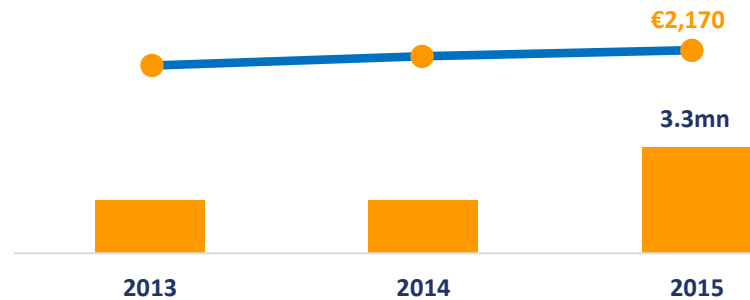
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: TNS Gallup and Ecommerce Foundation, 2016



Norway



Population 15+

4.2mn



Internet users

4.1mn (97%)



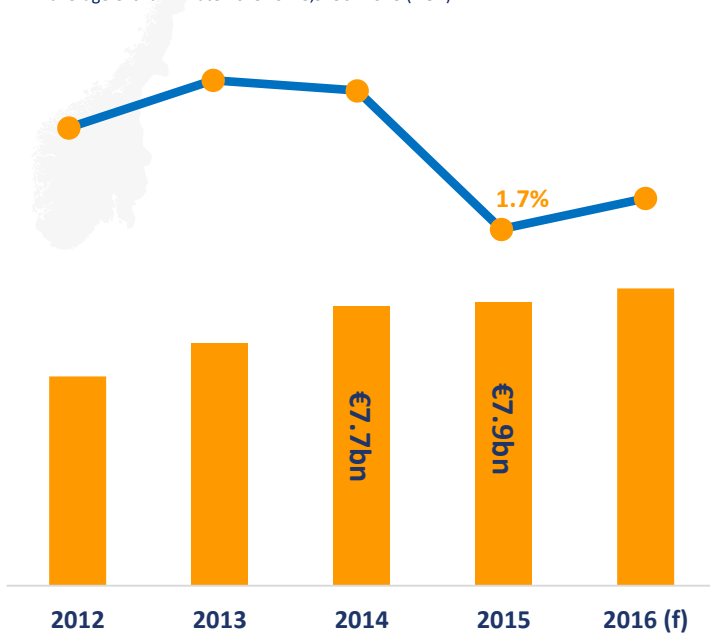
Number of e-shoppers

3.2mn (76%)

B2C E-COMMERCE - TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=8,9496 Krone (NOK)



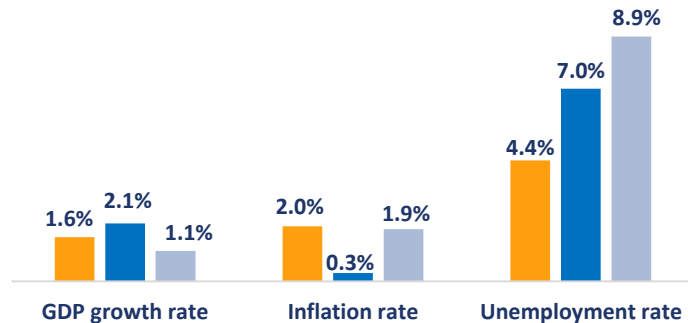
Source: Virke eHandel and Ecommerce Foundation, 2016

E-commerce Markets

Northern Europe

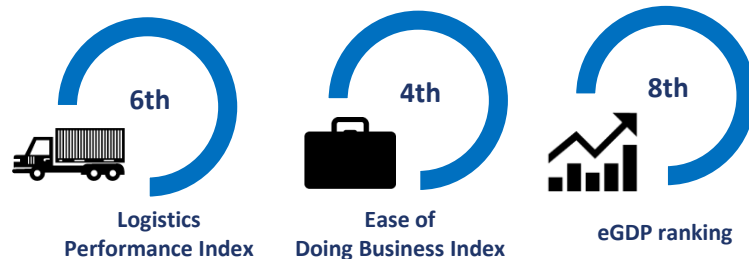
NORWAY VS REGIONAL AND EUROPEAN AVERAGES

■ Norway ■ Northern Europe ■ Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



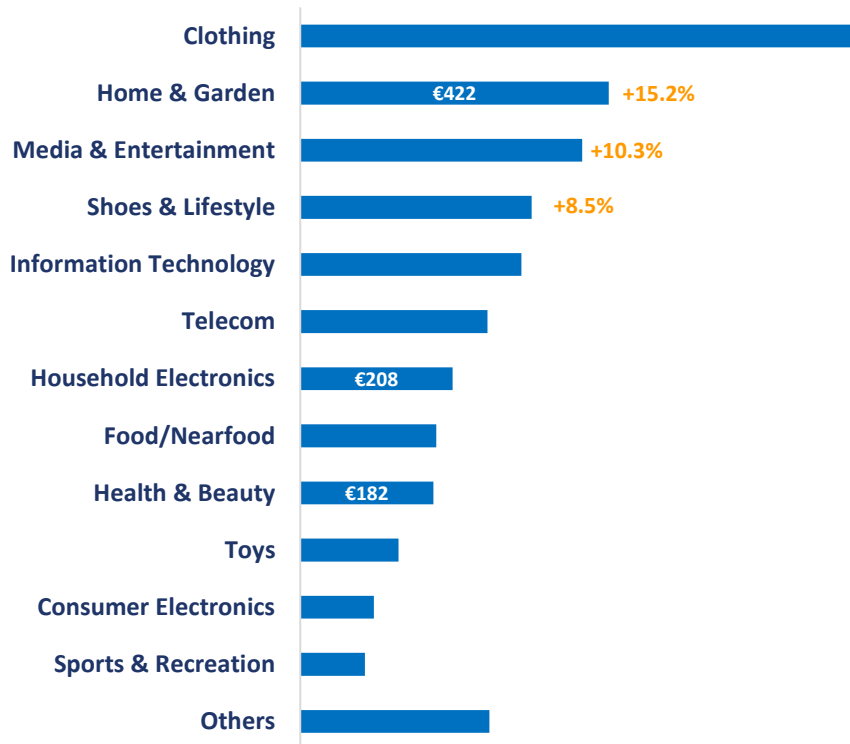
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation and Eurostat, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

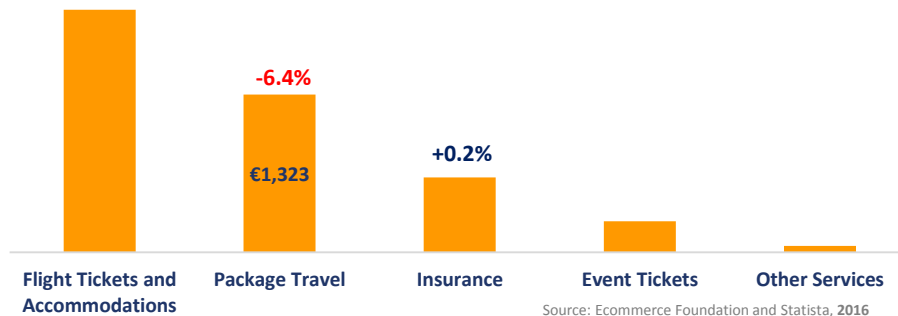
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

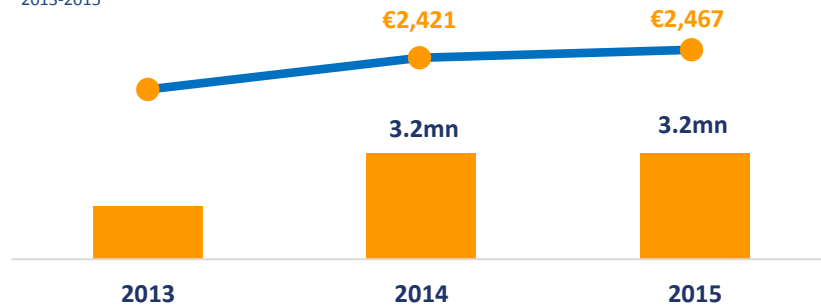
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Virke eHandel, Ecommerce Foundation and Eurostat, 2016



Sweden



Population 15+

8.1mn



Internet users

7.4mn (92%)



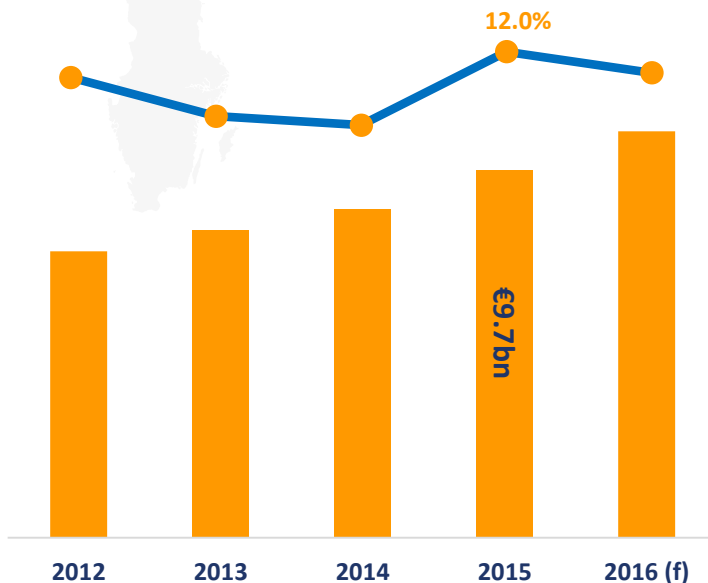
Number of e-shoppers

5.8mn (72%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=9,3535 Krone (SEK)

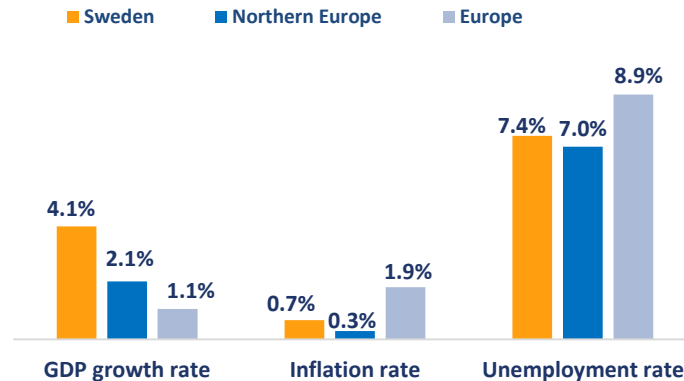


Source: DIBS and Ecommerce Foundation, 2016

E-commerce Markets

Northern Europe

SWEDEN VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



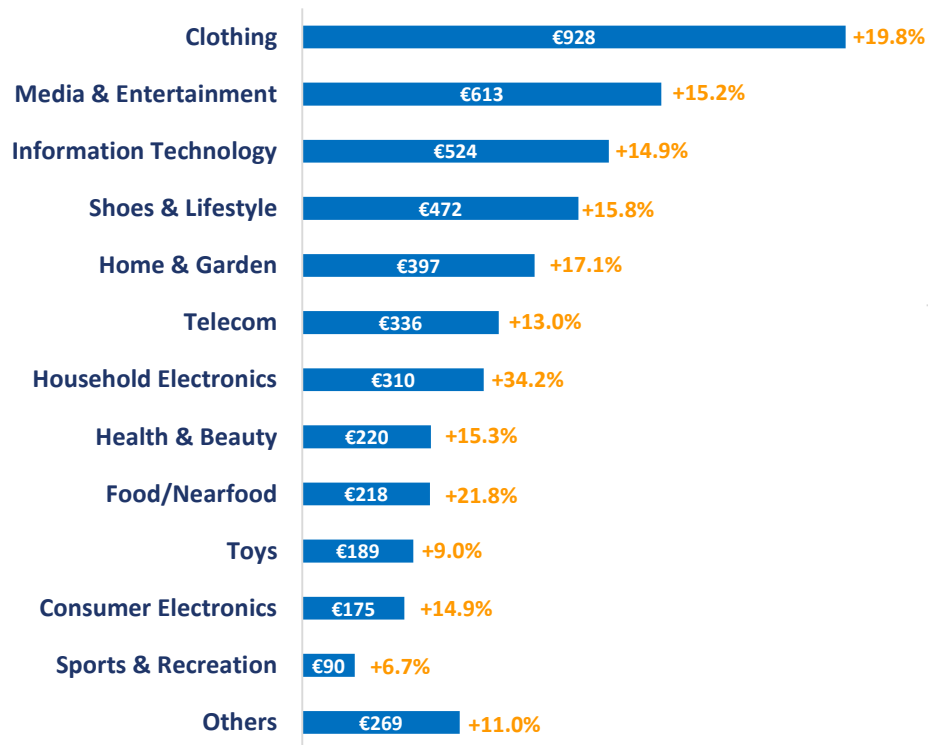
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ecommerce Foundation and Eurostat, 2016



OVERVIEW OF POPULAR PRODUCT GROUPS

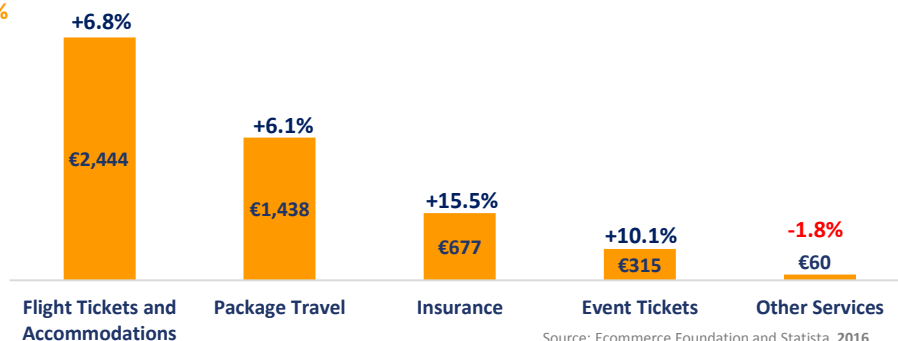
Estimated online sales of popular product groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

OVERVIEW OF POPULAR SERVICE GROUPS

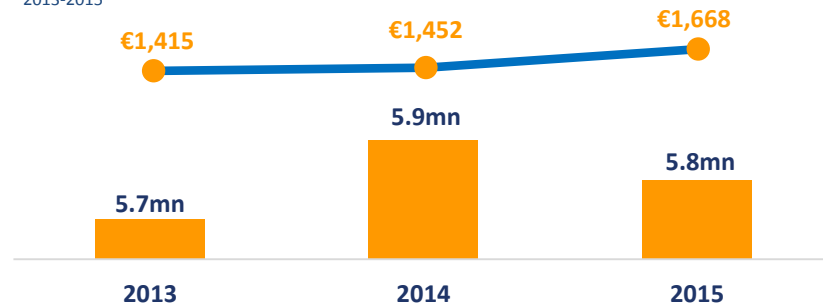
Estimated online sales of popular service groups, in millions of euros, 2015



Source: Ecommerce Foundation and Statista, 2016

NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: DIBS and Ecommerce Foundation, 2016



Eastern Europe

An Overview of B2C E-commerce Markets of Goods & Services in Eastern Europe



Commissioned by:



Executed by:

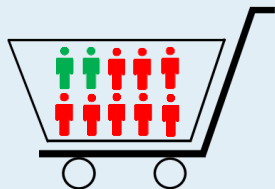




209mn people are over the age of 15



138mn people use the Internet (**66%**)



39mn people are e-shoppers (**19%**)



Europe €455.3bn +13.3%
Eastern Europe €24.5bn +9.1%
Total B2C E-commerce 2015 of goods & services



Forecast 2016

€26bn
Turnover E-commerce Goods & Services



Total GDP of
€1,533bn



Share of E-commerce in GDP **1.60%**

Ranking Eastern Europe in turnover (EUR million)

1		Russia	€20,536
2		Romania	€1,490
3		Ukraine*	€1,058
4		Bulgaria	€300
#		Other countries ¹	€1,101

¹ Other countries include: Albania, Belarus, Bosnia & Herzegovina, FYR Macedonia, Moldova, Kosovo, Montenegro and Serbia.

* Goods only



Estimated share of **online goods** in **total retail of goods**

Executed by: Ecommerce FOUNDATION

In cooperation with: GfK

Powered by:

ASENDIA
BY LA POSTE & SWISS POST

ingenico
GROUP

Manhattan
Associates

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B2C E-commerce Turnover and Growth

Eastern Europe

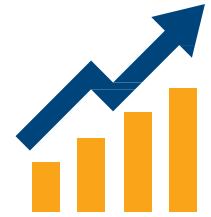
[Click here to order
the full European B2C E-commerce Report
for a complete overview of European e-commerce](#)

EASTERN EUROPEAN B2C ECOMMERCE TURNOVER, 2011 - 2016

Countries	2011	2012	Growth	2013	Growth	2014	Growth	2015	Growth	2016 (f)	Growth
Bulgaria	€120mn	€150mn	25.0%	€195mn	30.0%	€254mn	30.3%	€300mn	18.1%	€342mn	14.0%
Russia	€8,247mn	€10,937mn	32.6%	€14,697mn	34.4%	€19,259mn	31.0%	€20,536mn	6.6%	€21,621mn	5.3%
Ukraine*	€303mn	€446mn	47.1%	€660mn	48.0%	€784mn	18.7%	€1,058mn	35.0%	€1,429mn	35.0%
Romania	€600mn	€800mn	33.3%	€1,040mn	30.0%	€1,200mn	15.4%	€1,490mn	24.2%	€1,786mn	19.9%
Others	€495mn	€615mn	22.4%	€747mn	21.1%	€950mn	32.2%	€1,101mn	18.5%	€1,322mn	18.0%
Total	€9,766mn	€12,948mn	32.6%	€17,339mn	33.9%	€22,446mn	29.5%	€24,486mn	9.1%	€26,500mn	8.2%

Source: Ecommerce Foundation, AKIT, EWDN, UADM and Statista, 2016

*goods only



9.1%

**Growth of Eastern
Europe's B2C
e-commerce in 2015**



Bulgaria



Population 15+
6.2mn



Internet users
3.7mn (60%)



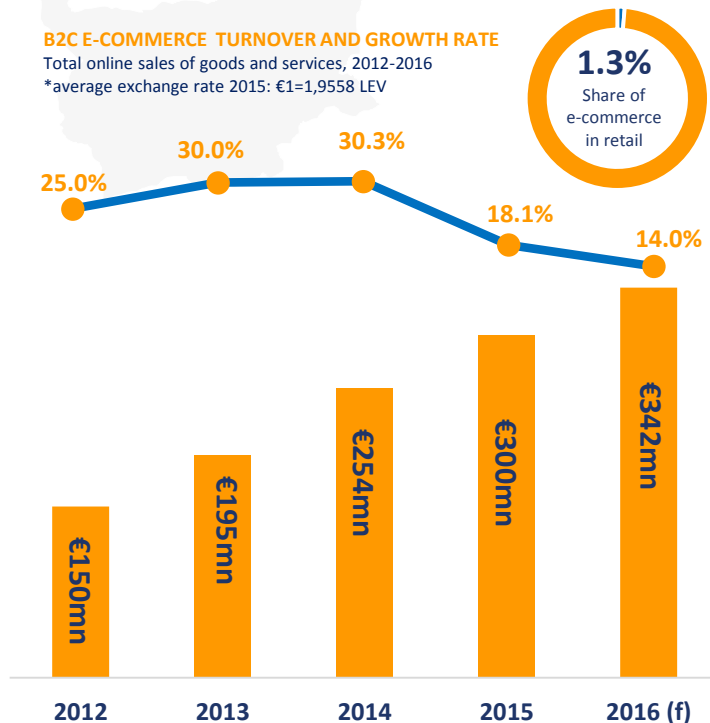
Number of e-shoppers
1.1mn (19%)

Source: Ecommerce Foundation and Eurostat, 2016

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=1,9558 LEV



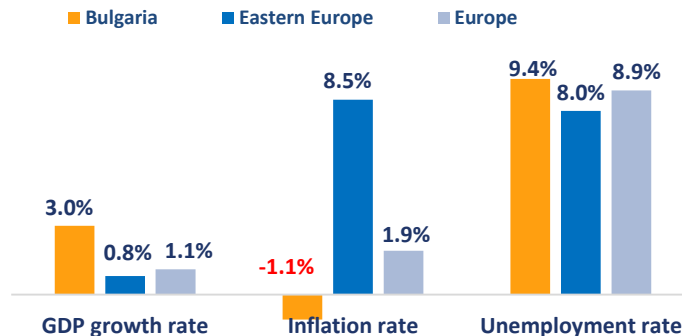
Source: Ecommerce Foundation and Statista, 2016



E-commerce Markets

Eastern Europe

BULGARIA VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



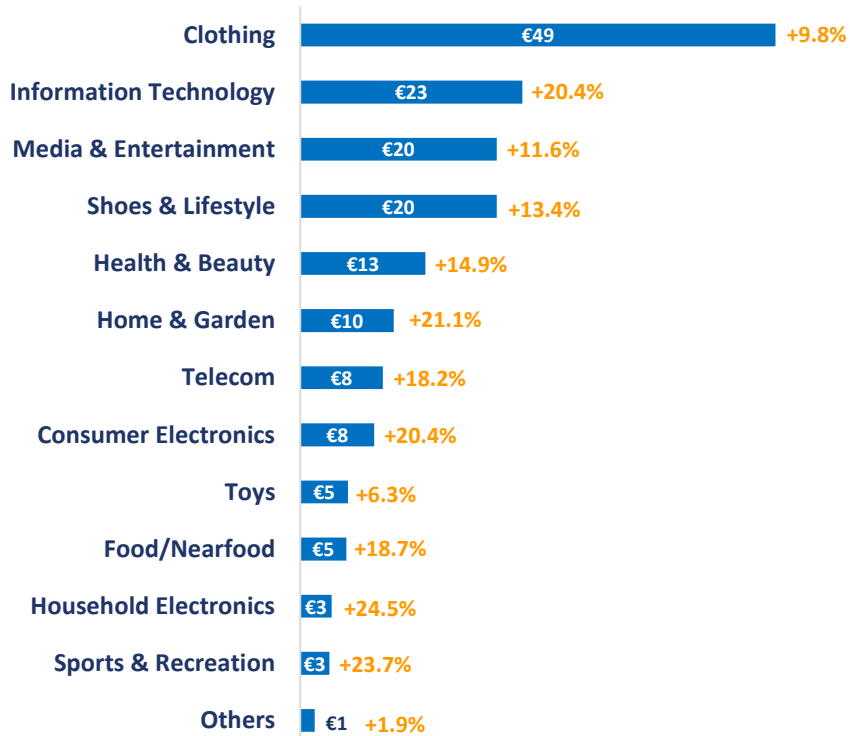
Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016



Bulgaria

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



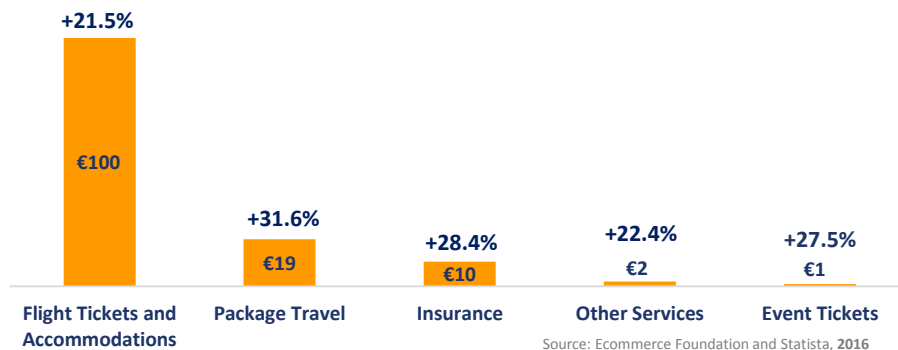
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

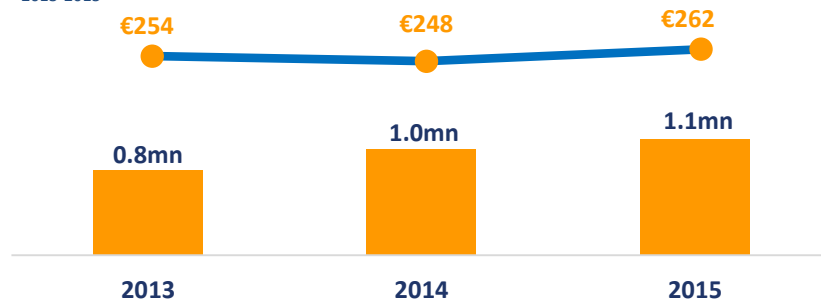
Eastern Europe

OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER 2013-2015



Source: Ecommerce Foundation and Eurostat, 2016



Russia



Population 15+
121.8mn



Internet users
85.8mn (70%)

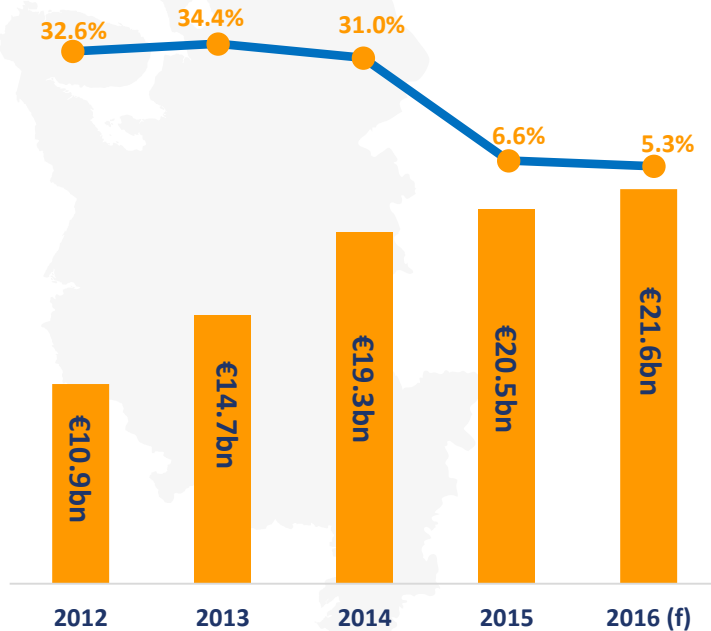


Number of e-shoppers
30.0mn (25%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016

*average exchange rate 2015: €1=68,0720 Ruble

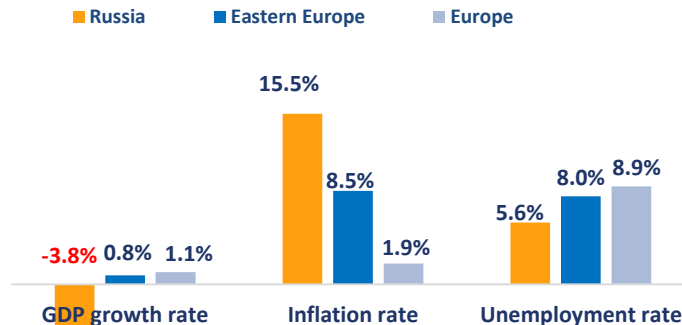


Source: AKIT, Ecommerce Foundation and Statista, 2016

E-commerce Markets

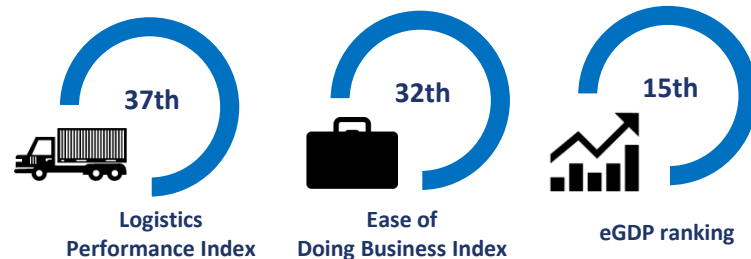
Eastern Europe

RUSSIA VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

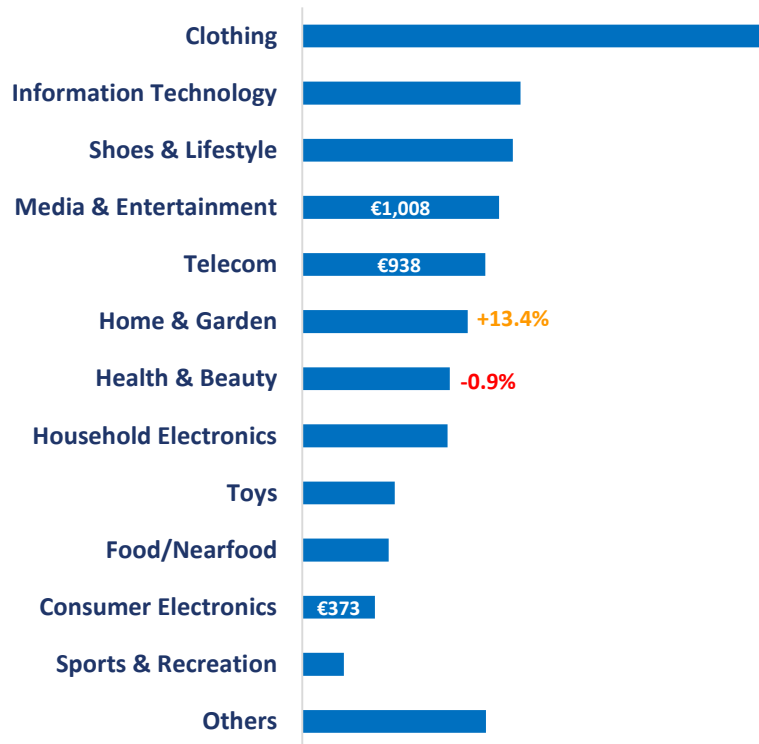
Source: Ecommerce Foundation, EWDN and Eurostat, 2016



Russia

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



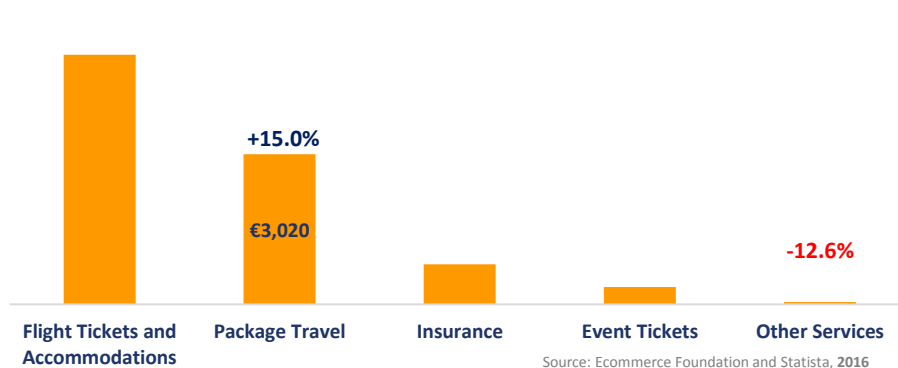
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Eastern Europe

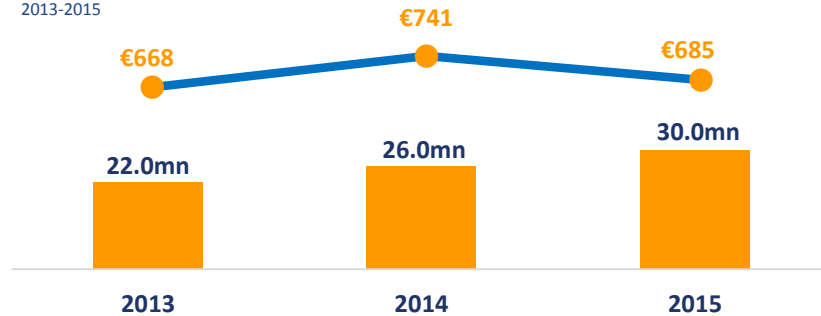
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation, AKIT and EWDN, 2016



Romania



Population 15+
17.0mn



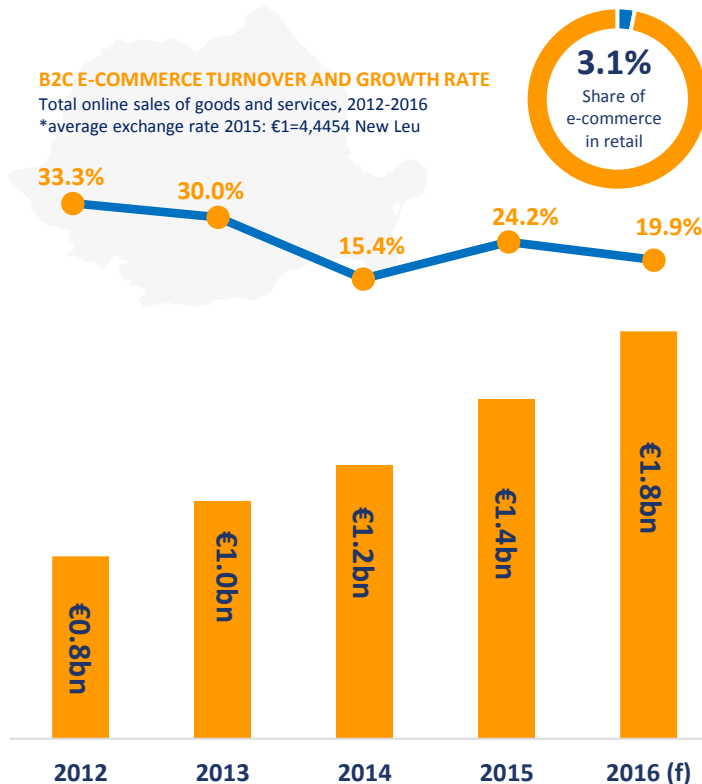
Internet users
10.5mn (62%)



Number of e-shoppers
1.9mn (11%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods and services, 2012-2016
*average exchange rate 2015: €1=4,4454 New Leu



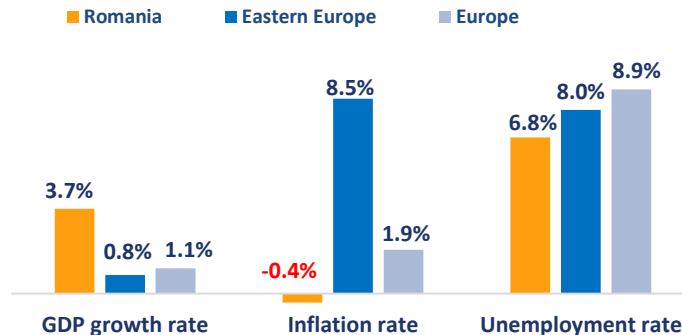
Source: Ecommerce Foundation and Statista, 2016



E-commerce Markets

Eastern Europe

ROMANIA VS REGIONAL AND EUROPEAN AVERAGES



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

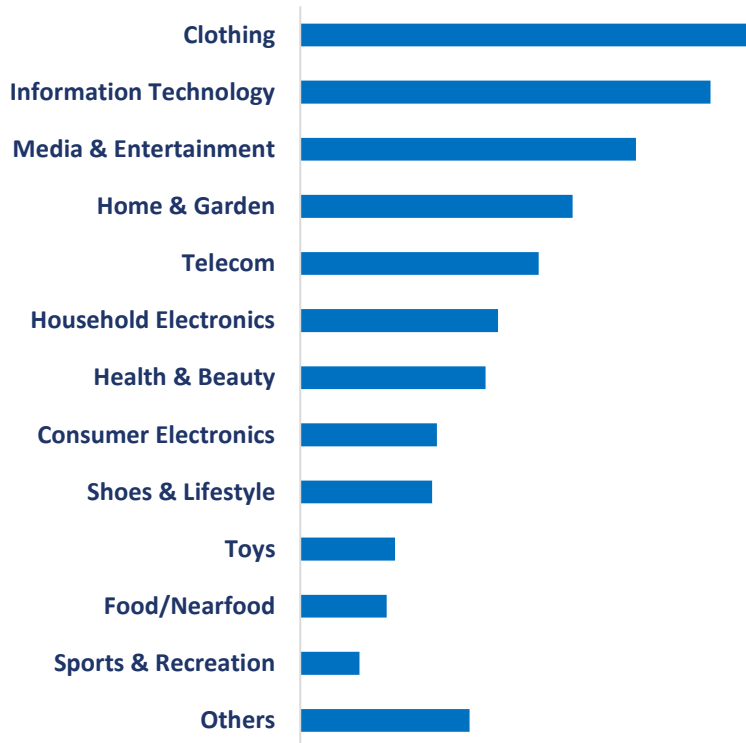
Source: Ecommerce Foundation and Eurostat, 2016



Romania

OVERVIEW OF POPULAR PRODUCT GROUPS

Estimated online sales of popular product groups, in millions of euros, 2015



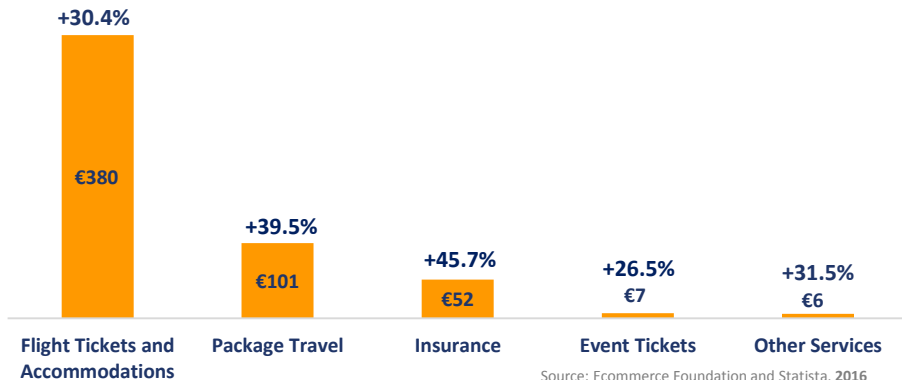
Source: Ecommerce Foundation and Statista, 2016

E-commerce Markets

Eastern Europe

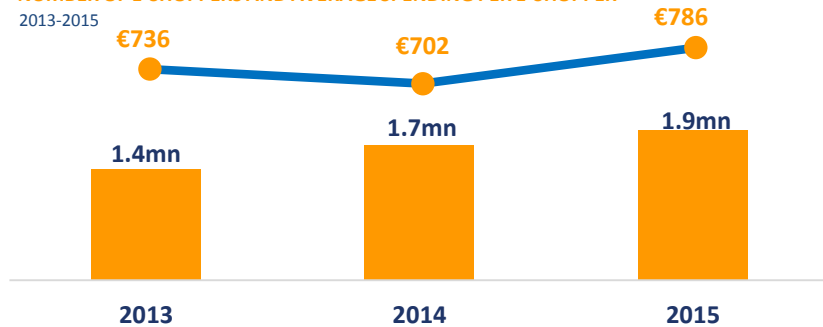
OVERVIEW OF POPULAR SERVICE GROUPS

Estimated online sales of popular service groups, in millions of euros, 2015



NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: Ecommerce Foundation and Eurostat, 2016



Ukraine



Population 15+

37.7mn



Internet users

21.9mn (58%)



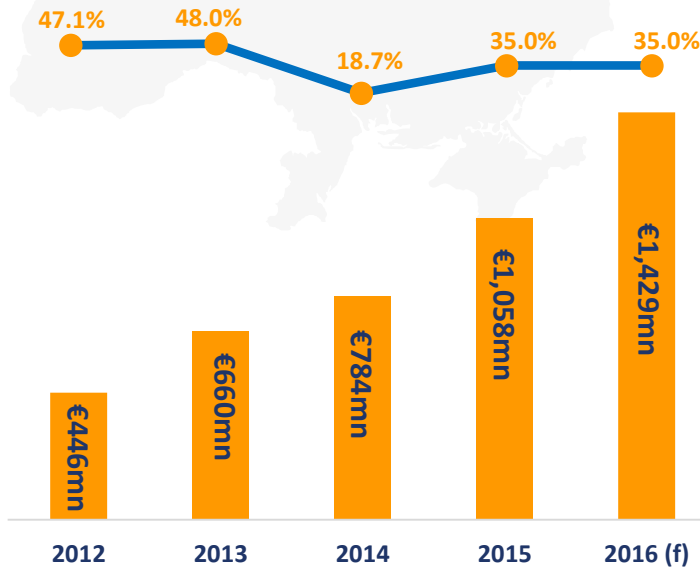
Number of e-shoppers

3.7mn (10%)

B2C E-COMMERCE TURNOVER AND GROWTH RATE

Total online sales of goods, 2012-2016

*average exchange rate 2015: €1=24,23 Hryvnia



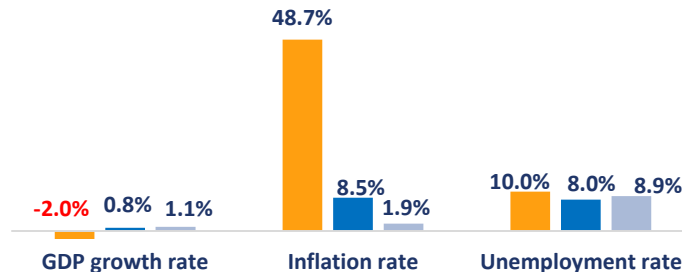
Source: UADM and Ecommerce Foundation, 2016

E-commerce Markets

Eastern Europe

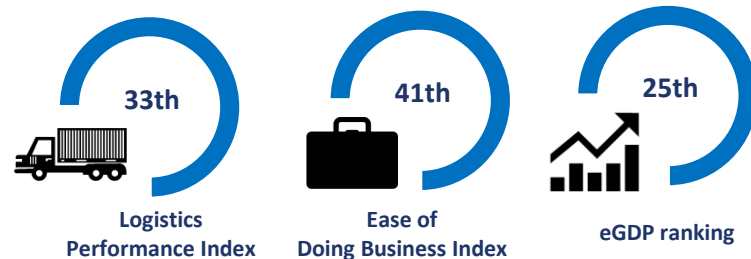
UKRAINE VS REGIONAL AND EUROPEAN AVERAGES

Ukraine Eastern Europe Europe



Source: Ecommerce Foundation, Eurostat, IMF, Tradingeconomics and Worldbank, 2016

EUROPEAN RANKING



Source: Worldbank, Doingbusiness and Ecommerce Foundation, 2016

Source: Ukrainian Internet Association, Research Holding Factum Group, Ecommerce Foundation and Eurostat, 2016



TOP 10 ONLINE RETAILERS

Average number of unique visitors per month, 2015

Rank	Top 10 online retailers	Monthly visitors
1	Rozetka	23,600,000
2	Allo	3,500,000
3	Modnakasta	2,800,000
4	Comfy	2,600,000
5	F.ua	2,400,000
6	Mobilluck	2,400,000
7	Leboutique	2,300,000
8	Citrus	2,200,000
9	Lamoda	2,100,000
10	Eldorado	1,800,000

Source: UADM, 2016

TOP 5 COMPARISON SITES

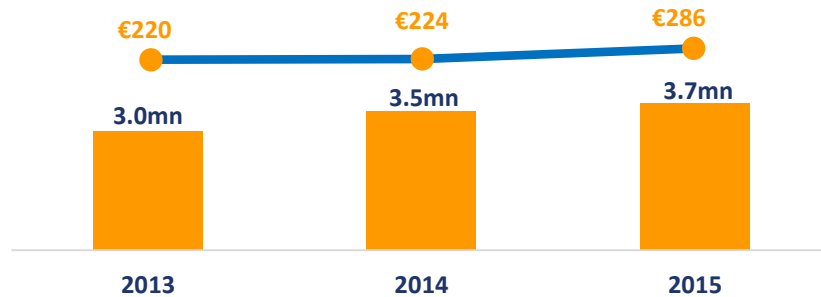
Average number of unique visitors per month, 2015

Rank	Top 5 comparison sites	Monthly visitors
1	Hotline	7,300,000
2	Price	3,700,000
3	Market.yandex	2,900,000
4	EK	1,600,000
5	M	1,400,000

Source: UADM, 2016

NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER

2013-2015



Source: UADM and Ecommerce Foundation, 2016



Overview and Forecast

General Overview Tables and Forecast of B2C European E-commerce Turnover of Goods & Services



Commissioned by:



Executed by:



Overview of Online B2C E-commerce Sales

Overview and Forecast

Countries	2011	2012	2013	2014	2015	2016 (f)
United Kingdom					€157.1bn	
France					€64.9bn	
Germany					€59.7bn	
Russia	€8.2bn				€20.5bn	
Spain					€18.2bn	
Italy					€16.6bn	
Netherlands					€16.1bn	€18.0bn
Denmark			€8.4bn	€9.9bn	€11.7bn	
Sweden				€8.6bn	€9.7bn	
Switzerland					€8.5bn	
Turkey		€3.5bn			€8.5bn	
Belgium		€4.7bn			€8.2bn	
Norway					€7.9bn	
Poland					€7.6bn	
Austria					€7.5bn	
Finland					€7.2bn	
Ireland					€5.9bn	
Greece					€3.8bn	
Czechia				€3.5bn	€4.3bn	
Portugal					€3.3bn	
Romania					€1.5bn	
Hungary					€1.1bn	
Ukraine					€1.1bn	€1.4bn
Baltic States					€0.9bn	
Bulgaria			€0.2bn		€0.3bn	

Sources: Ecommerce Foundation, National Associations and other sources, 2016



OVERVIEW ONLINE B2C

E-COMMERCE SALES GROWTH 2011 - 2016

Based upon online sales growth
of goods and services, 2015

Overview of Online B2C E-commerce Sales Growth

Overview and Forecast

Countries	2011	2012	2013	2014	2015	2016(f)
Ukraine					35.0%	
Turkey					34.9%	
Belgium					34.2%	
Romania			30.0%		24.2%	
Czechia					23.3%	
Hungary					20.4%	
Greece					18.8%	
Bulgaria	20.0%				18.1%	
Ireland				8.7%	18.0%	
Denmark					17.9%	
Poland					17.8%	
Netherlands		8.6%			16.1%	
Portugal					15.9%	
Italy					15.6%	
Austria					14.3%	
France			13.6%		14.3%	
Germany					13.3%	
Switzerland					12.3%	
Sweden	12.3%	10.2%			12.0%	
Baltic states		26.1%			11.8%	
Spain					11.6%	15.7%
United Kingdom					11.0%	
Finland				14.2%	9.6%	
Russia					6.6%	
Norway					1.7%	4.7%

Sources: Ecommerce Foundation, National Associations and other sources, 2016



OVERVIEW ONLINE B2C E-COMMERCE SALES GROWTH 2011 - 2016

Based upon online sales growth
of goods and services, 2015

Forecast

Overview and Forecast

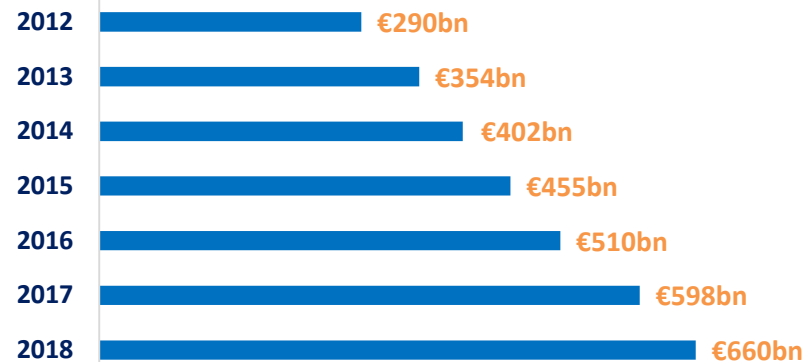
European e-commerce turnover has been growing steadily over the years, with an annual growth of around **12-13%**. It is expected that this growth will continue in the years to come, resulting in European e-commerce sales of **€510bn** in 2016, **€598bn** in 2017 and **€660bn** in 2018.

An interesting trend at the moment is that the **growth rate** of the **mature markets** is leveling off. However, the overall European growth rate is maintained due to the rapid increase of several **Southern and Eastern European e-commerce markets**, for instance.

As a result, the share of the three leaders in Europe – the UK, Germany and France – of **60%** will gradually decrease to around **55%** in 2018. Countries such as **Spain** and **Italy** are still well behind these three leaders, but they will very probably gain some ground and improve their share in the European B2C e-commerce market of goods and services.

Decisive factors for such a growth will be **growing confidence** in surfing the web, **higher disposable incomes** and a **further growth in fast, affordable mobile Internet** through smartphones and tablets.

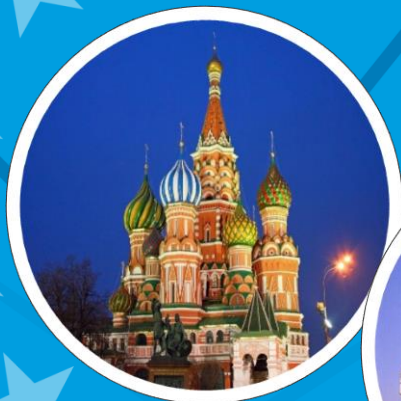
OVERVIEW AND FORECAST OF EUROPEAN B2C E-COMMERCE TURNOVER



Source: Ecommerce Foundation, 2016

About Ecommerce Europe and Ecommerce Foundation

Information about Ecommerce Europe and the Ecommerce Foundation



Commissioned by:



Executed by:



Information about Ecommerce Europe

About Ecommerce Europe and Ecommerce Foundation

Ecommerce Europe

Ecommerce Europe is the association representing 25,000+ companies that sell products and/or services online to consumers in Europe. Founded by leading national e-commerce associations across the continent, its mission is to advance the interests and influence of European e-commerce through advocacy, communication and networking.

Goals

Ecommerce Europe has been setup with the following objectives in mind;

- to enhance the success of the European B2C e-commerce industry;
- to provide for a strong and effective representation of B2C e-commerce industry in Brussels;
- to advance the interest of B2C e-commerce industry with relevant stakeholders and institutions;
- to create an environment in which e-commerce companies feel at home;
- to realize new brand recognition and membership engagement at all levels.

Ecommerce Europe Events

In order to achieve its goals, Ecommerce Europe, organizes several events throughout the year. A number of key examples are the Global E-commerce Summit, the Ecommerce Europe Pre-conferences & European E-commerce Awards and the Round Tables.

For more information about these events, please visit our website at www.ecommerce-europe.eu.

National Associations

Ecommerce Europe welcomes and invites national associations in EU member states and EFTA countries representing (part of) the e-commerce B2C industry in their domestic market to join the association. For more information on procedures and how to join Ecommerce Europe, please contact us at info@ecommerce-europe.eu.

Who can be involved?

- E-commerce associations, voting members of Ecommerce Europe: association membership;
- Companies selling goods and/or services online: EU online shop register / company membership;
- Preferred suppliers to the European e-commerce industry: business partnership;
- Organizations and NGOs related to the e-commerce industry: associative partnership;
- European institutions, consumer organizations and stakeholders: partners for dialogue.

Why get involved?

- Be a part of, get involved in or stay informed on public affairs initiatives that define your business;
- Take advantage of research publications and receive several B2C E-commerce Reports for free;
- Learn from position papers, webinars and white papers by leading e-commerce associations, companies and preferred business partners;
- Show that you are engaged by displaying the Ecommerce Europe member or business partner logo;
- Increase your network; meet and greet colleagues at Round Tables sessions in European capitals and at the yearly Global E-commerce Summit.

Ecommerce Foundation

The Ecommerce Foundation is an independent **non-profit organization**, co-founded by Ecommerce Europe and working in partnership with national e-commerce associations worldwide. In addition, the Ecommerce Foundation cooperates with online and omnichannel selling companies from industries such as retail, travel & finance. Its mission is to facilitate the development of **practical knowledge**, insights and learnings **for** which individual **institutions, associations and B2C selling companies** do not have the (financial) resources and/or capabilities.

By combining collective goals and efforts, the Ecommerce Foundation is able to **realize** e-commerce research, reports, benchmarks and studies that could **not** have been **possible** on an **individual basis**.



Ecommerce Foundation's Research Services

About Ecommerce Europe and Ecommerce Foundation



The **Ecommerce Benchmark** allows companies to compare & improve their e-commerce activities. Compare your performance with that of others in your industry at www.ecommercebenchmark.org



The **EcommerceWiki** is *the* online e-commerce guide for online retailers, corporate digital experts and students. Read all about e-commerce-related topic at www.ecommercewiki.org



Custom research is performed for a diverse set of companies, both co-branded and white-labeled. For more information, please go to www.ecommercefoundation.org



Our **E-commerce Reports** provide facts & figures on the most important e-commerce markets in the world. Download the light versions or order the full versions through www.ecommercewiki.org

Information about the Reports

About Ecommerce Europe and Ecommerce Foundation

About the reports

The **B2C E-commerce Reports** are published by the **Ecommerce Foundation**. They provide overviews of the mature and emerging markets and of the major European and global statistics in the field of e-commerce.

In total, the Ecommerce Foundation will publish 12 country reports, covering the most important e-commerce markets worldwide. These include the United States of America, the United Kingdom, China and Brazil. In addition, it will publish a European and global overall report. For publication dates and prices, please see the table on the right.

Personalized report

It is also possible to have a tailor-made e-commerce report made, completely based on your wishes and requirements. This can be ordered through info@ecommercefoundation.org.

Light reports

Ecommerce Europe also publishes light reports, which contain a summary of the full reports. These light reports can be downloaded for free through www.ecommercewiki.org

2016 prices and publication schedule

European overview report (€790)

- May 30

Global overview report (€790)

- September 29

Country reports (€95)

- | | |
|-------------------|--------------|
| • The Netherlands | April 7 |
| • Belgium | April 14 |
| • United Kingdom | April 21 |
| • United States | April 28 |
| • Germany | May 12 |
| • France | May 19 |
| • Australia | June 23 |
| • Russia | July 7 |
| • Japan | July 21 |
| • China | September 15 |
| • Brazil | October 13 |
| • India | October 27 |

*The reports are free of charge for all company members and business partners, as well as for the members of our Nationals Associations.

About Ecommerce Europe and Ecommerce Foundation

Media Partners

Ecommerce Europe media partners are (inter)national publishers and/or publications related to the European e-commerce industry.

As the Internet continues to become a part of almost every aspect of our lives, the growing internationalization of the online retail sector places increasing demands on e-tailers to make rapid preparations for cross-border activity. Actors in the online trade sector are constantly being confronted with new challenges concerning legal issues, pricing, shipping, payment and supply. Strong partnerships are vital in order to tap into the cross-border market, optimise trade flows and ultimately increase profitability.

Ecommerce Europe is looking for media partners who publish on e-commerce in the following sectors:

- Affiliate Marketing;
- Customer Service;
- E-commerce Systems;
- Email Marketing;
- Fulfilment;
- Hosting;
- Payment Solutions;
- Research & Consultancy;
- Search Engine Optimization;
- etc.

Company Members

Ecommerce Europe Company Members are B2C companies selling goods and/or services online to consumers in Europe. Company membership is open to all B2C online companies at €950 per year.

Benefits for **COMPANY MEMBERS** include:

- Free Ecommerce Europe Member logo for your website
- Free Yearly European B2C E-commerce Report (€790)
- Free 6 Country Reports on B2C E-commerce (€570)
- Free full Conference Package for 1 person tot the Global E-commerce Summit (€1,295)
- Free entrance for 1 person to the Ecommerce Europe Annual Conference (€195)
- Free entrance to Round Table meetings in European cities
- 50% discount on Global B2C E-commerce Report (€395)
- 50% discount on 6 Country Global B2C E-commerce Reports (€285)
- 50% discount on the premium Ecommerce Benchmark (€499)
- Receive weekly and monthly monitoring reports on the association's policy, lobbying and advocacy efforts.

If you are interested in becoming a media partner or Company Member, please contact us at info@ecommerce-europe.eu



Our Preferred Business Partners

About Ecommerce Europe and Ecommerce Foundation

Business Partners

Ecommerce Europe Business Partners are preferred suppliers of the European e-commerce industry. The costs are €8,500 per year upon balloting.

Benefits for BUSINESS PARTNERS include:

- Free Ecommerce Europe business partner logo for your website
- One free advertorial/banner in Ecommerce Europe newsletter (€2,250)
- Free European B2C E-commerce Report (€790)
- Free 6 Country Reports on European B2C E-commerce (€570)
- Free entrance for 2 persons to the Ecommerce Europe Annual Conference (€390)
- Free 2 Full Conference Packages to the Global E-commerce Summit (€2,590)
- Free entrance to Round Table meetings in European cities
- Pro-active involvement advocacy and lobbying team in Brussels
- 50% discount on Global B2C E-commerce Report (€395)
- 50% discount on 6 Global Country B2C E-commerce Reports (€285)

If you are interested in becoming a business partner, please contact us at info@ecommerce-europe.eu



Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Europe and Ecommerce Foundation

GOMSEC aims to provide **guidelines for measuring and monitoring B2C e-commerce**. As a result, **all countries worldwide** are able to provide data with respect to the penetration of B2C e-commerce in a standardized way. All Ecommerce Foundation figures and estimates are based on GOMSEC, unless stated otherwise. The data and research by GfK is also in accordance with GOMSEC.

The GOMSEC reports on sales figures for the total B2C e-commerce worldwide and for each country separate in the country profiles, **based on total sales of goods and services**.

These total sales of goods and services are based on the **areas/sectors/classification of areas and sectors, as stated on the next few pages**.

All data reported in **the national currency of the country involved** is converted into euros according to **the average (annual) rate of exchange** as provided by, preferably, **the European Central Bank (ECB)** or the **national bank** of the particular country. The reference period that is used for this was from **1 January 2015 to 31 December 2015**. Growth rates are calculated and measured by the B2C e-commerce sales in the national currency.

Definition of B2C e-commerce sales

“Any B2C contract regarding the sale of goods and/or services, fully or partly concluded by a technique for distance communication.”

Technique for distance communication: means that can be used for communication regarding the offer made by the trader and the conclusion of a contract, without the necessity of the consumer and trader being in the same place at the same time.

Contract: a contract whereby use is made, either solely or in part, of one or more techniques for distance communication within the framework of a system organized by the trader for the distance sale of goods and/or services, up to and including the moment that the contract is concluded;

Classification of B2C e-commerce

The following classification on the next few pages provides an overview of areas and sectors included in GOMSEC.

Online purchases of the following items are **excluded from GOMSEC**:

- Transactions between private individuals/consumers (C2C), such as auctions and marketplaces, and between businesses (B2B)
- Online gambling and gaming
- Cars and other motor vehicles
- Houses and real estate
- Utilities (e.g. water, heating and electricity)
- Mortgages, loans, credit cards and overdrafts
- Savings accounts, funds, stocks&shares and bonds

B2C e-commerce therefore **includes** all online transactions between businesses and consumers using desktop computers, laptops, tablets, smartphones, point-of-sales and smart-wearables, for instance through online shops, physical stores (“online instore”), email, QR codes, catalogs, etc. B2C e-commerce includes Value Added Tax (VAT) or other sales tax, delivery costs and apps, but excludes returns.

Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Europe and Ecommerce Foundation

Media & Entertainment
Music (physical, download & streaming)/Spotify based on new subscriptions
Video (DVD, Blu-ray, downloads)
Games hardware & games software
Books & e-books
Apps
New subscriptions newspapers and magazines (no single copy sales)

Fashion	
<i>Clothing</i>	<i>Shoes & Personal lifestyle</i>
Underwear & Upperwear	Shoes
Children's wear	Jewelry, Bijoux, Watches & others
Swimwear & Sportswear	fashion accessories (e.g. sunglasses)
Nightwear & legwear	Bags, wallets, suitcases

Toys
Indoor and outdoor toys

Electronics		
<i>Consumer Electronics</i>	<i>Information Technology (IT)</i>	<i>Household Electronics</i>
Photo equipment	IT hardware (PCs, laptops, tablets, etc.)	MDA: air-conditioning, dishwashers, wash machines and other white goods
Audio equipment	Computer Software	
TV/video equipment	Music instruments	
Car electronics (navigation, audio, etc.)	USB sticks, DVD/CD-recordable, ink cartridges, computer accessories	SDA: equipment for personal care, home comfort, kitchen appliances

Sports & Recreation
Sports hardware (e.g. soccer shoes, tennis rackets)
Bicycles & accessories
Articles for camping and recreation

Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Europe and Ecommerce Foundation

Home & Garden
Furniture and kitchens
Floor and window coverings (e.g. curtains and blinds)
Home textiles
Cookware (sets), kettles and oven equipment
Table and kitchen articles
Articles for cleaning, wash and store
Decoration
Lamps and fixtures
DIY-articles
Garden articles
Flowers and plants (in home)

Telecom
Smartphones, mobile phones & mobile devices
Telefax and answering machines
Headsets & Accessories (mobile) phones
Prepaid cards and tariffs of new phone subscriptions

Food/Nearfood/Health	
<i>Food/Nearfood</i>	<i>Health & Beauty</i>
Food & Beverages	Personal care & Hygiene
Fresh produce	Baby care
Packaged consumer goods	Perfume
Detergents/household cleaning	OTC
Animal feed	
Tobacco	

Other: Products
Cars components
Glasses and contact lenses
Stationery
Pictures and photo albums
Pet supplies
Erotica

Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Europe and Ecommerce Foundation

Insurance		
<i>New indemnity, Life and Health Insurances</i>		
Liability insurance	ANW-gap insurance	Health Insurance –
Car insurance	(insurance for receiving a	Base
Fire and theft insurance	payment in addition to a	Health insurance –
	survivor's allowance)	additional
Bike/caravan/motorbike/	Annuity insurance	Disability insurance –
Scooter insurance	Pension	entrepreneurs
Accident insurance	Life insurance	Disability insurance –
Boat insurance	Funeral insurance	private
Legal assistance insurance	Endowment insurance	Mortgage-related
Home insurance	based on savings	disability insurance
Travel insurance	Endowment insurance	Mixed insurance
(continuous/annual + short	based on investments	(=endowment
term)		insurance + life
Insurance package		insurance)

Travel	
<i>Package Travel</i>	<i>Flight Tickets & Accommodations</i>
Package travel	Flight Tickets
Private transport if booked through a tour operator	Hotel stays
	Apartment/bungalow/camping site
	-> all of the above not booked in combination with other travel-parts

Event Tickets
Tickets for concerts and festivals
Tickets for (movie) theaters
Tickets for zoos and amusement parks
Tickets for museums
Tickets for sports games

Other: Services
New subscriptions to dating service
Other services

Definitions related to the Internet, e-commerce and online retailing

About Ecommerce Europe and Ecommerce Foundation

- **Broadband access:** the availability of broadband is measured by the percentage of households that are connectable to an exchange that has been converted to support DSL technology, to a cable network upgraded for Internet traffic, or to other broadband technologies. It includes fixed and mobile connections (source: Eurostat)
- **Cross-border e-commerce:** percentage of e-commerce purchased at foreign sites
- **Ease of Doing Business Index:** The Ease of Doing Business Index is developed by the World Bank, and averages the country's percentile rankings on nine topics. It is made up of a variety of indicators, giving equal weight to each topic. The rankings for all economies are benchmarked to June 2010. The Index covers 185 countries.
- **E-commerce (or electronic commerce), a subset of e-business:** any B2C contract on the sale of products or services fully or partly concluded by a technique for distance communication.
- **E-commerce GDP:** total amount of goods and services online divided by the total Gross Domestic Product (GDP).
- **Economic Freedom Index:** the Index of Economic Freedom is an annual guide published by The Wall Street Journal and The Heritage Foundation, Washington's No. 1 think tank. For over a decade, the Wall Street Journal and The Heritage Foundation have tracked the march of economic freedom around the world with the influential Index of Economic Freedom. There are 5 categories, ranking from Free (with a score between 80 and 100) to Repressed (between 40 and 49.9).

- **E-households:** number of households that use the Internet for personal gain.
- **E-household expenditure:** expenditure per household that bought goods or services in the past year.
- **Global Online Measurement Standard for B2C E-commerce (GOMSEC):** aims to provide guidelines to measure and monitor B2C e-commerce in order to enable all European countries to provide data with respect to the penetration of B2C e-commerce in a standardized way.
- **E-Government Index:** The UN's E-Government Index provides a comparative assessment of the e-government development of UN Member States. One of the primary factors contributing to a high level of e-government development is concurrent past and present investment in telecommunication, human capital and provision of online services.
- **Gross Merchandise Volume:** the total sales facilitated by a third party, such as a market place.
- **E-services or electronic services:** "Deeds, efforts or performances whose delivery is mediated by information technology. Such e-service includes the service element of e-retailing, customer support, and service delivery." This definition reflects three main components: service providers, service receivers and the channels of service delivery (i.e. technology). (Jennifer Rowley, Professor Information and Communications, Manchester Metropolitan University, UK)
- **Inactive online population:** users that have access to the Internet but have not (yet) purchased goods or services online in the past year.

Definitions related to the Internet, e-commerce and online retailing

About Ecommerce Europe and Ecommerce Foundation

- **Market place:** online platform on which companies (and consumers) sell goods and/or services.
- **Logistics Performance Index (LPI):** The Logistics Performance Index (LPI) measures the “logistics friendliness” of 155 countries. It helps countries identify the challenges and opportunities they face in their trade logistics performance and what they can do to improve this. The Index is developed by the World Bank and is based on a worldwide survey of operators, such as global freight forwarders and express carriers.
- **Mobile commerce (or m-commerce):** the ability to conduct commerce using a mobile device e.g. a mobile phone, a PDA, a smartphone, a tablet or other (emerging) mobile equipment.
- **Mobile subscriptions:** mobile cellular telephone subscriptions are subscriptions to a public mobile telephone service using cellular technology, which provide access to the public switched telephone network. Post-paid and prepaid subscriptions are included (source: Eurostat).
- **Networked Readiness Index (NRI):** The NRI measures the tendency for countries to exploit the opportunities offered by information and communications technology (IT). The NRI comprises three components: the environment for IT offered by a given country or community, the readiness of the country's key stakeholders to use IT, and the usage of IT among these stakeholders.
- **Online buyer (or e-shopper, e-buyer):** an individual who regularly bought or ordered goods or services through the Internet.

- **Online expenditure:** spending per user who purchased goods or services online.
- **Online Retail (or e-retail, electronic retail or retailing or even e-tailing):** the selling of retail goods and services on the Internet. In the limited sense of the word, sectors such as online leisure travel, event tickets, downloading music or software are not included. Online-only retail shops are often referred to as pure players.
- **Penetration levels:** the percentage of a population using the Internet, mobile phones, smartphones or tablet devices.
- **Real economic growth rate:** a measure of economic growth from one period to another expressed as a percentage and adjusted for inflation. The real economic growth rate is a measure of the rate of change that a nation's gross domestic product (GDP) experiences from one year to another.
- **Retail sales:** the selling of mainly goods from businesses to individuals from a traditional or so-called bricks-and-mortar shop.
- **Statcounter research method:** Statcounter is a web analytics service and their tracking code is installed on more than three million sites globally. These sites cover various activities and geographic locations. Every month, Statcounter records billions of page views to these sites. For each page view, they analyze the browser/operating system/screen resolution used and they establish if the page view is from a mobile device. They calculate their Global Stats on the basis of more than fifteen billion page views per month, by people from all over the world onto more than three million member sites.

Methodology , Acknowledgements and Sources

About Ecommerce Foundation

This report could only be realized by consulting a great many sources, available in various countries and regions in Europe and around the globe. The wide variety of sources include public domain publications, blogs, websites, industry and financial specialist publications, regional and local news, annual reports and press releases. Sometimes the information sources are contradictory. Sometimes different figures and data were given by different sources within the same country, for example due to different definitions.

In our reports and country profiles we have mentioned different sources, definitions and the different outcomes of such reports, studies and interpretations. This report is meant solely for use by the recipient and is not for circulation. This report is based on information that we consider reliable, but we cannot vouch for it being accurate or complete, nor should it be relied upon as such. Opinions expressed are our current opinions as of the date of this report.

The sources consulted include:

(Inter)national Associations

- Becommerce.be (Belgium)
- APEK (Czechia)
- FDIH (Denmark)
- Finnish Commerce Federation (Finland)
- Verkketeollisuus (Finland)
- Fevad (France)
- Händlerbund (Germany)
- Greca (Greece)
- SZEK.org (Hungary)
- Retail Excellence (Ireland)
- Netcomm (Italy)
- eCOM.lu (Luxembourg)
- Netcomm (Italy)
- Retail Excellence (Ireland)
- Thuiswinkel.org (Netherlands)
- Virke eHandel (Norway)
- E-Commerce Polska (Poland)
- ACEPI (Portugal)
- AKIT (Russia)
- Adigital (Spain)
- Netcomm Suisse (Switzerland)
- ETID (Turkey)
- UADM (Ukraine)

Other sources

- A.T. Kearny
- Belgische Markt Monitor
- BEVH
- Capgemini
- DIBS
- Eurostat
- EWDN
- Gemius
- GfK
- Google Barometer
- Heureka.cz
- IMRG
- IMF
- Observatory Netcomm Suisse
- ONTSI
- Osservatori.net
- PwC
- Research Holding Factum Group
- Retail-index
- Statista
- Thuiswinkel Markt Monitor
- TNS Gallup
- Tradingeconomics
- Worldbank

About Ecommerce Europe and Ecommerce Foundation



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Roald Willemsen (1991) has worked for Ecommerce Europe and the Ecommerce Foundation since 2015, and graduated in Business Management from the University of Applied Sciences in Ede.

He is involved in the research of the global e-commerce market and is developer of the National E-commerce Reports.



Jorij Abraham, Director Research & Advice

Jorij Abraham (1972) has been part of the international e-commerce community since 1997. He was an E-commerce Manager at Bijenkorf, TUI and Sanoma Media and Director of Consulting at Unic.

Since 2013 he has been Director of Research & Advice at Ecommerce Europe. He is also director of the Ecommerce Foundation, a research institute offering practical e-commerce research and benchmark services.



Richard van Welie, Chief Editor

Richard van Welie (1979) has worked for Ecommerce Europe and the Ecommerce Foundation as a chief editor since March 2014. In his role, he is responsible for the National E-commerce Reports and the EcommerceWiki. In addition, he is involved in the Ecommerce Benchmark and other projects.

After graduating in Communication Sciences in 2004, he studied American Studies at Radboud University Nijmegen and graduated in 2008.

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European B2C E-commerce Report 2016



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