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European Ecommerce Report 2017



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A word from Ecommerce Europe

Online retail continues to grow significantly. Whereas retail in general is still facing difficult times, the European ecommerce turnover still managed to increase by 15% to €530 billion in 2016. We can safely state that online trading is here to stay.

Naturally, as Ecommerce Europe, we are very pleased with these figures, as stimulating European ecommerce is one of our main objectives. We strive to create a level playing field for online trading in EU countries and our work is more likely to be successful when we gather the right facts & figures. This European B2C Ecommerce Report provides us with the right ecommerce facts, figures and trends. As a result, these reports offer great insights into European ecommerce markets and contain valuable information for companies that want to start cross-border trading in Europe.

Therefore, we would like to thank the Ecommerce Foundation for their hard work in creating this report. Because of their meticulous research, we now have a strong basis for our activities. If you like to become involved with Ecommerce Europe or one of our national associations, please contact us through our website www.ecommerce-europe.eu or send us an email at info@ecommerce-europe.eu.



François Mombosse
President



Marlene ten Ham
Secretary General



Ecommerce Europe, the European Ecommerce Association

About Ecommerce Europe

Through its 20 national associations, Ecommerce Europe represents over 25,000 online shops across Europe. Its mission: boost the ecommerce industry by helping decision makers shape policies fit for future sustainable growth. To do so, Ecommerce Europe takes initiatives to come up with innovative market solutions, provides a platform for expert discussion and facilitates connections between online retailers and relevant stakeholders. It also highlights the importance of ecommerce to the economy through the provision of in-depth research on the European and global markets. Additionally, Ecommerce Europe stimulates the industry by developing initiatives like its European Trustmark label.

Who can be involved?

Ecommerce Europe welcomes national ecommerce associations and companies selling goods and/or services online as (company) members. Besides this, it invites preferred suppliers to the European ecommerce industry and other organizations and NGO's related to the ecommerce industry to become partners. Members and partners of Ecommerce Europe benefit from a wide variety of things: they are informed about and can influence European regulation, share and exchange knowledge with other stakeholders, network with peers and boost the visibility of their own organizations at the events that Ecommerce Europe organizes.

Ecommerce Europe Working Committees

Ecommerce Europe focuses on six key policy areas covered by its Working Committees:

- e-Regulations (consumer & contractual policies, internet security & data protection, ePrivacy, taxation, competition);
- e-Payments (online payments, e-identification);
- e-Logistics (cross-border parcel delivery).

The Working Committee meetings are an excellent opportunity for industry representatives from all over Europe to come together to share information and best practices and to discuss obstacles they face in their daily ecommerce operations. Ecommerce Europe shares the outcomes of its Working Committee Meetings with European policy makers through its Position Papers and its Ecommerce Europe Manifesto.

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Thank you

Thank you for downloading this report. This report describes both the commercial opportunities, as well as its challenges for the main ecommerce markets in Europe. Europe is (slowly and with hiccups) moving towards a more uniform market. While cross-border ecommerce is increasing, there are still many barriers to overcome. We hope this report will help you overcome any challenges in selling online in the European market.

The Ecommerce Foundation is an independent non-profit organization, initiated by worldwide national ecommerce associations, as well as online and omnichannel selling companies. Our **mission** is to **foster global digital trade**, as peace is the natural effect of trade. By facilitating digital commerce we hope to make the world a slightly better place.

We especially would like to **thank** our Report Partners; namely **EuroCommerce, Asendia Management, Ingenico, Manhattan Associates, SAP Hybris, and GfK**. Without their support, this report would not have been created. Moreover, a great amount of gratitude is extended to Ecommerce Europe, the European ecommerce association for their unending support.

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Jorij Abraham
MD Ecommerce Foundation



Ecommerce is changing our sector fundamentally, creating new business opportunities and models, new jobs, and new forms of interaction with consumers, with many consumers buying online and more retailers selling online. Growth in ecommerce in Europe is in double figures, and set to go on growing fast. Europe needs to shape its policies to allow consumers and traders to make the most of the potential of a market of 500 million Europeans. As the principal organisation representing retail and wholesale in Europe, we decided to support the European Ecommerce Report 2017. The report is unique in the scope and depth of its analysis of this growing market and sound methodology and research on which the Ecommerce Foundation based its work.

Christian Verschueren
Director-General



A Thank You to our Report Partners



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.



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.



Ingenico ePayments is the online and mobile commerce division of Ingenico Group. We are the trusted partner of over 65,000 small and large merchants who rely on us to make payments easy and secure for their customers. With advanced data analytics, fraud management solutions and cross-border commerce expertise, we help merchants optimize their business and grow into new markets around the world.



Manhattan Associates is a technology leader in supply chain and omni-channel commerce. We unite information across the enterprise, converging front-end sales with back-end supply chain execution. Our software, platform technology and unmatched experience help drive both top-line growth and bottom-line profitability for our customers. Manhattan Associates designs, builds and delivers leading edge cloud and on-premises solutions so that across the store, through your network or from your fulfilment centre, you are ready to reap the rewards of the omni-channel marketplace.



SAP Hybris solutions provide omnichannel customer engagement and commerce software that allows organizations to build up a contextual understanding of their customers in real time, deliver a more impactful, relevant customer experience, and sell more goods, services and digital content across every touch point, channel and device. SAP Hybris software for customer engagement and commerce provides organizations with the foundation, framework and business tools to create a holistic customer view across channels, simplify customer engagement and solve complex business problems.

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Introduction to Europe

A Brief Introduction to Europe

In classical Greek mythology, Europa is the name of either a Phoenician princess or of a queen of Crete. The name contains the elements "wide, broad" [and "eye, face hence their composite Europe would mean "wide-gazing" or "broad of aspect"].

Europe covers about 10,180,000 square kilometers (3,930,000 sq mi), or 2% of the Earth's surface (6.8% of land area). Politically, Europe is divided into 47 sovereign states of which the Russian Federation is the largest and most populous. Europe has a total population of approximately 840 million (about 11% of world population) as of 2017.

Greece is the birthplace of Western civilization. The fall of the Western Roman Empire marked the end of ancient history and the beginning of the Middle Ages. Renaissance humanism, exploration, art, and science led to the modern era. From the Age of Discovery, Europe played a predominant role in global affairs. The Industrial Revolution, which began in Great Britain at the end of the 18th century, gave rise to radical economic, cultural, and social change in Western Europe. Both world wars took place for the most part in Europe, contributing to a decline in Western European dominance in world affairs by the mid-20th century as the Soviet Union and the United States took prominence. During the Cold War, Europe was divided along the Iron Curtain between NATO in the west and the Warsaw Pact in the east, until the revolutions of 1989 and fall of the Berlin Wall.

The political map of Europe is substantially derived from the re-organization of Europe, following the Napoleonic Wars in 1815. The prevalent form of government in Europe is parliamentary democracy, in most cases in the form of Republic; in 1815, the prevalent form of government was still the Monarchy. Europe's remaining eleven monarchies are constitutional.

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. In 1986, the tariffs between member states were abolished. Additionally, 12 member states decided to introduce one common currency (the euro) in 1998, and later on this Eurozone was expanded to 19 countries. While the European Union continuously strives to create a uniform (digital) market, it proves a difficult process. Living proof is the decision in 2016 of the United Kingdom to leave the EU.



Introduction to Europe. Source: Wikipedia; The World Bank; IMF; Ecommerce Foundation, 2015 and 2016

Boosting cross-border ecommerce in Europe

Advocacy and lobbying

Home to the European institutions, Brussels is at the very heart of the European decision-making process. Since almost 80% of national legislations comes from Brussels, Ecommerce Europe helps shape European legislation which directly impacts ecommerce businesses in the Member States. Together with European policymakers, Ecommerce Europe works on a daily basis to create a European policy which removes the biggest obstacles for online merchants to expand their business cross-border.

Strategy

Ecommerce Europe's strategy is based on advocacy, lobbying and communication. Together with its 20 national associations, Ecommerce Europe gathers issues and evidence of obstacles hampering the development of the sector and translates these into lobbying priorities. Through collaboration with other relevant stakeholders, and using its members' expertise, Ecommerce Europe develops positions and proposes workable solutions to the European legislators in order to foster the growth of the European ecommerce industry.

Obstacles to cross-border ecommerce

In 2016, Ecommerce Europe launched a European-wide "Cross-border Ecommerce Barometer" amongst its membership base that represents more than 25,000 online shops. The results of the survey show that online merchants with cross-border ambitions are often held back by barriers such as legal uncertainty due to unclear or very different rules, taxation and payment systems that differ greatly, or high prices of delivery due to a lack of transparency.

in the market. Other difficult barriers to overcome when selling abroad are related to (online) payments, competition issues, language, client relationships and marketing. Ecommerce Europe provides concrete recommendations on how to overcome these barriers to growth of ecommerce.

Solutions proposed by Ecommerce Europe

Ecommerce Europe works together with all European stakeholders to rapidly remove the remaining barriers in cross-border ecommerce. We identify problems as well as measure progress in the ecommerce market following from policy initiatives taken at EU level. This way, we are always well informed and ready to give evidence-based advice to policy makers. We recommend policy makers to support market initiatives, to abolish superfluous regulation and to only consider new regulatory structures if absolutely necessary. Also, we take up an active role in stimulating growth in areas where we think this is needed. An example of this is our pan-European Trustmark that can generate consumer trust in the cross-border market.

Marlene ten Ham

Secretary General of Ecommerce Europe

"As more than 80 % of national legislation is determined in Brussels, Ecommerce Europe's Brussels team is at the heart of the European decision-making process. Through advocacy and lobbying, among other things, we strive to unlock the potential of cross-border ecommerce"



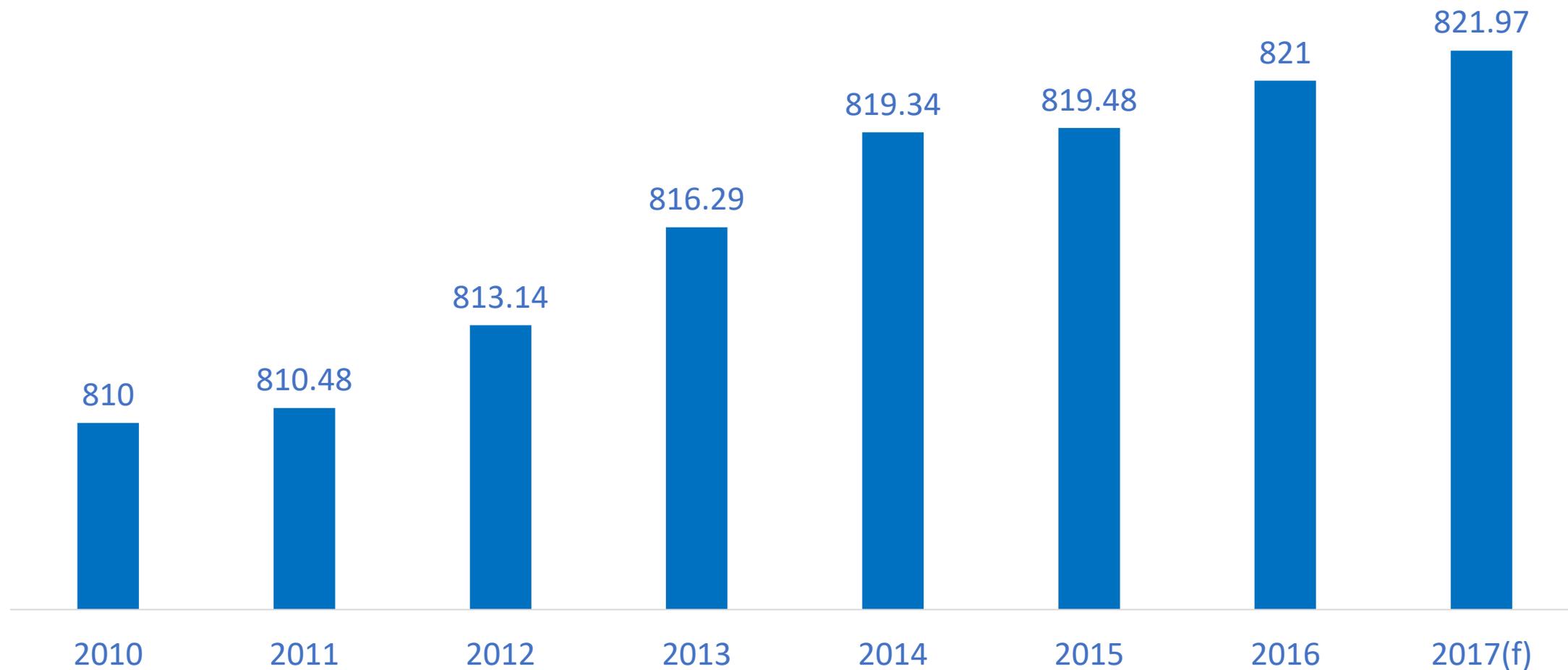
The ongoing strength of electronic commerce and industry innovation will fuel further growth in electronic payment volumes in Europe. However, SEPA and new EU regulations such as PSD2 are set to exert a considerable influence on the European payments market over the next few years. As such, compliance will be an important issue for merchants who want to take full advantage of the opportunities that the European market represents.

David Shell
VP of Global Marketing

ingenico
ePayments

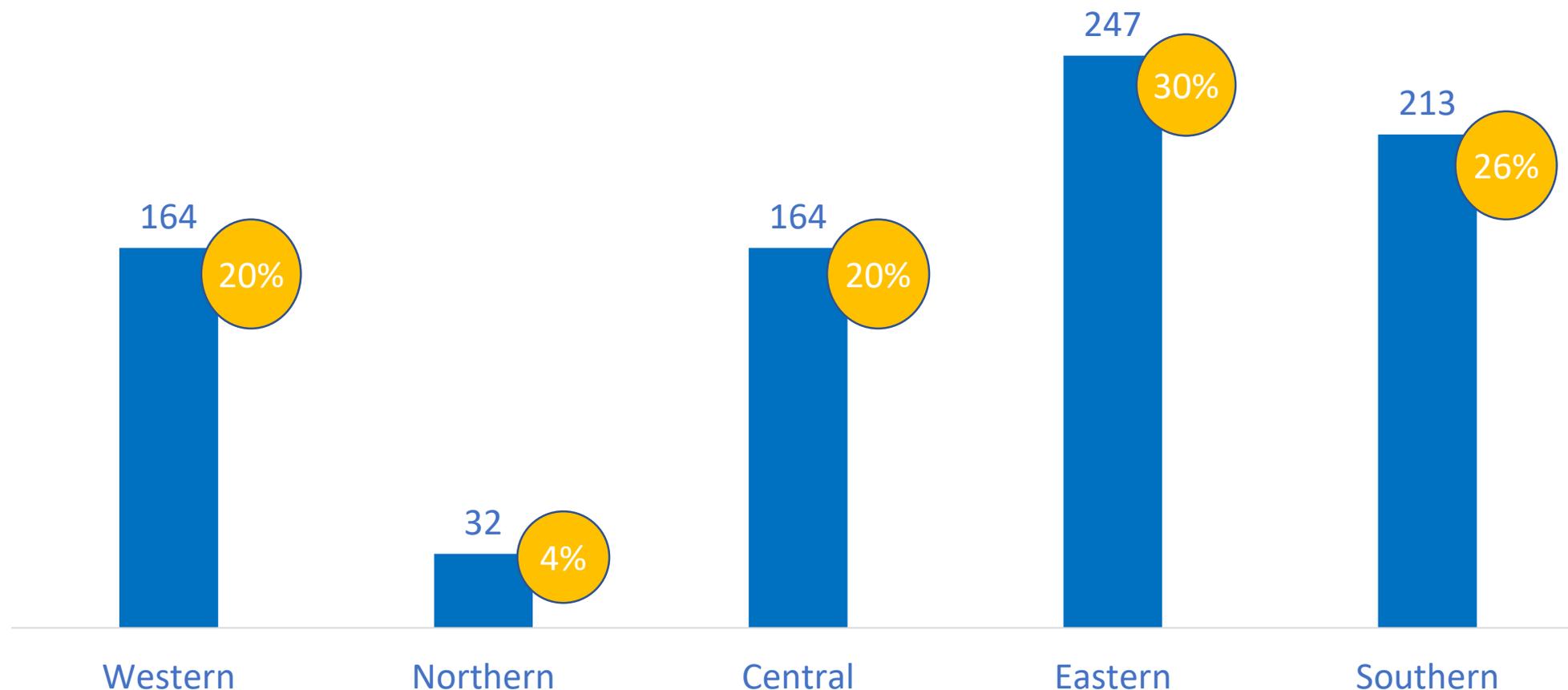


Europe's population continues to increase (millions)



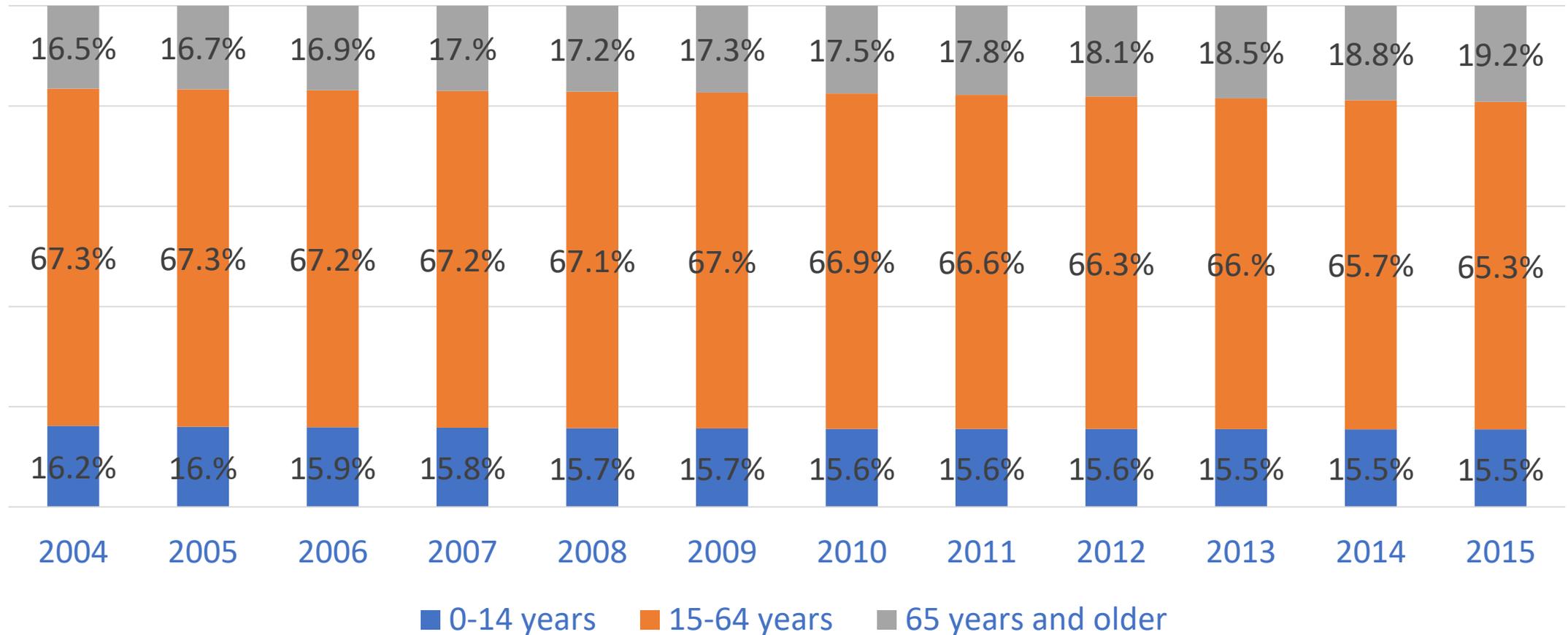
Europe's population in Millions. Source: The World Bank, 2017 (excl. AN, AM, AZ, GE, KZ, LI, MC, ME, SM, and VA)

The Eastern region has the largest population (includes Russia)



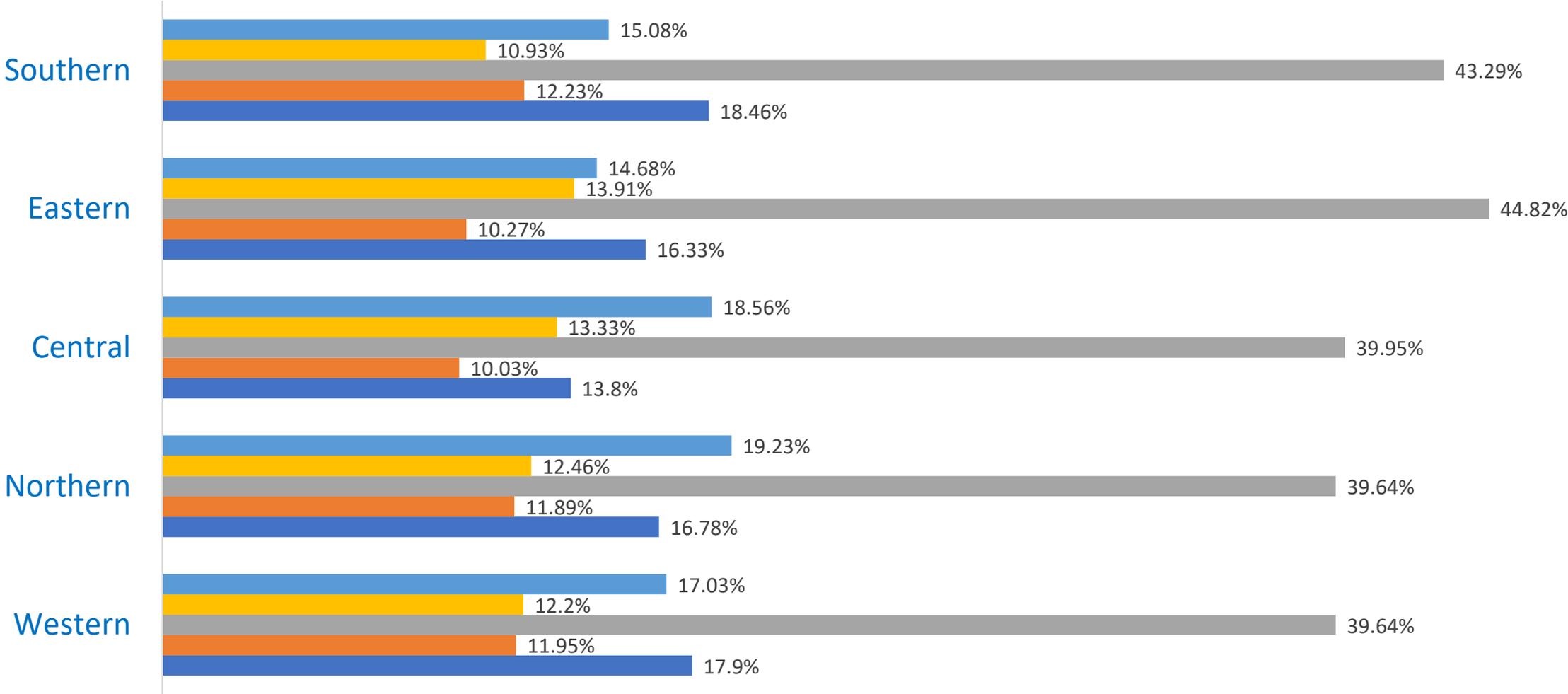
Europe's population in Millions, per Region. Source: The World Bank, 2017

The 65+ age group is slowly growing in Europe



Age structure of Europe, 2004-2015. Source: Statista, 2016

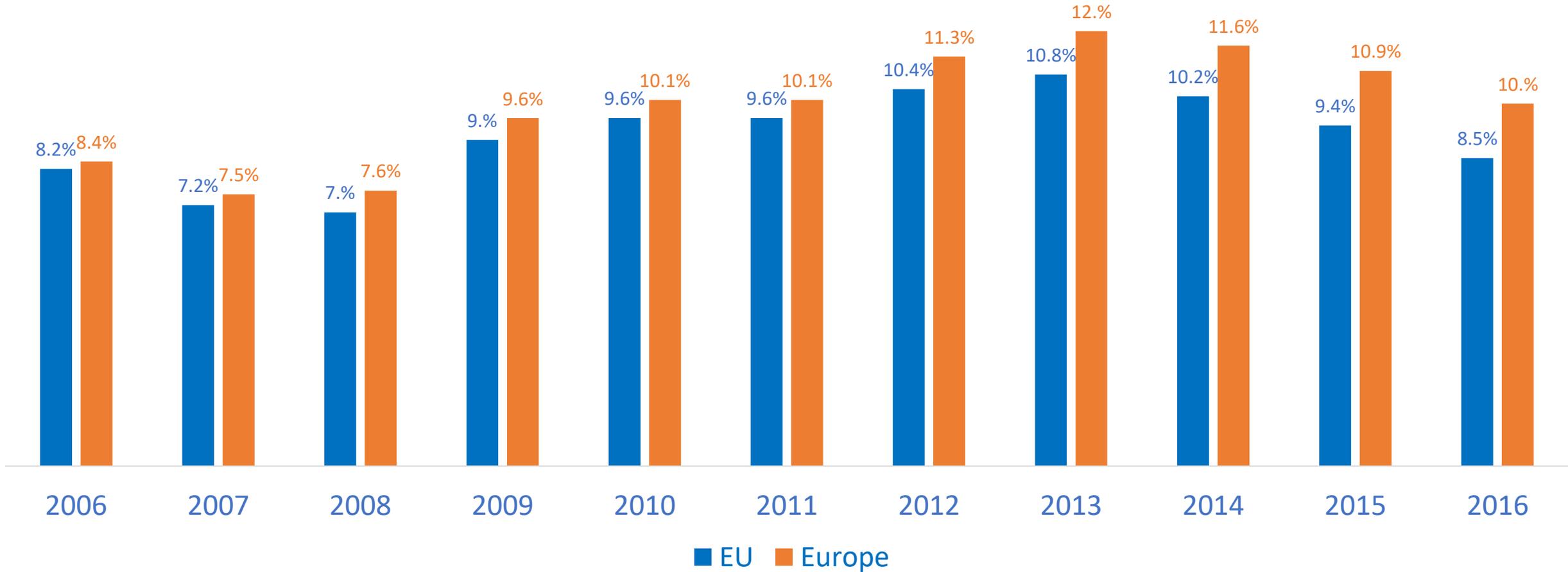
Northern and Central Europe have the oldest population



■ 65+ ■ 55-64 ■ 25-54 ■ 15-24 ■ 0-14

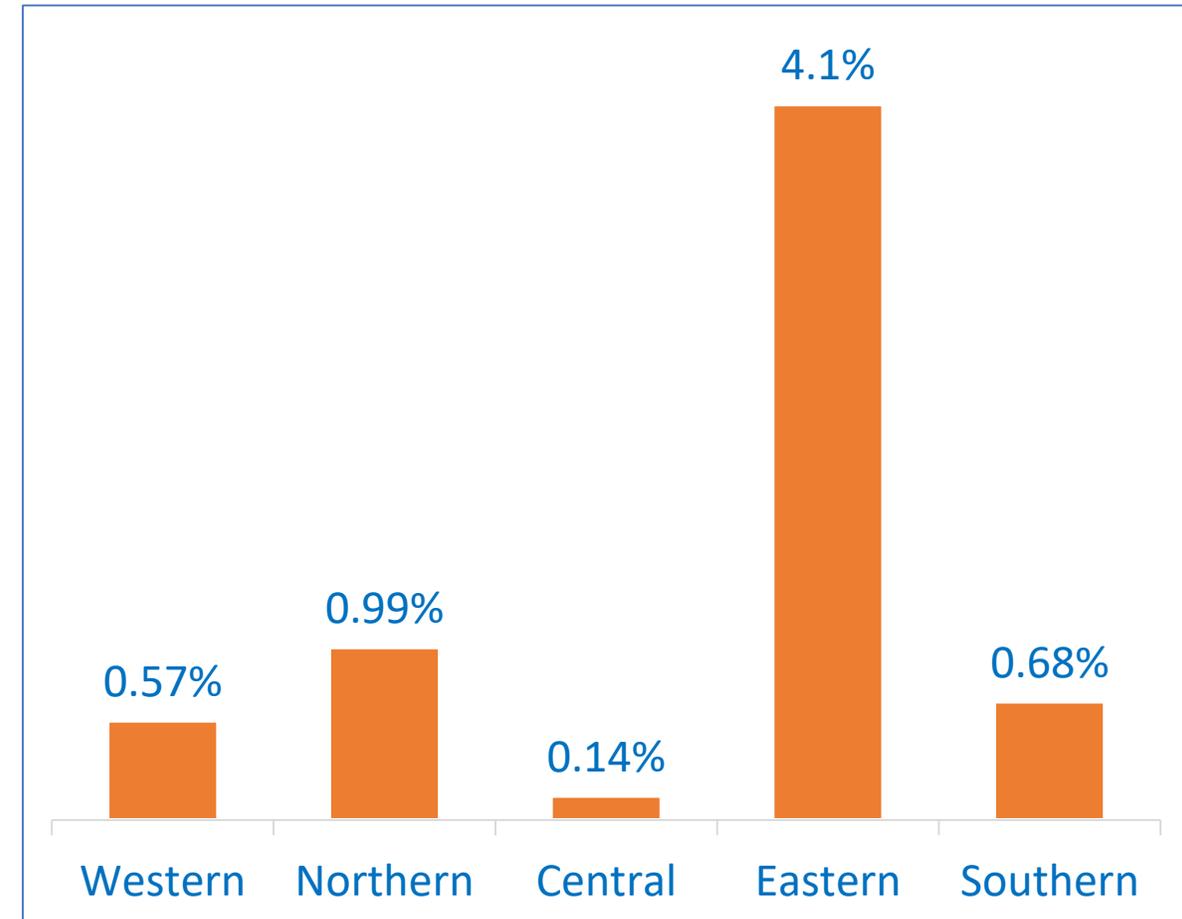
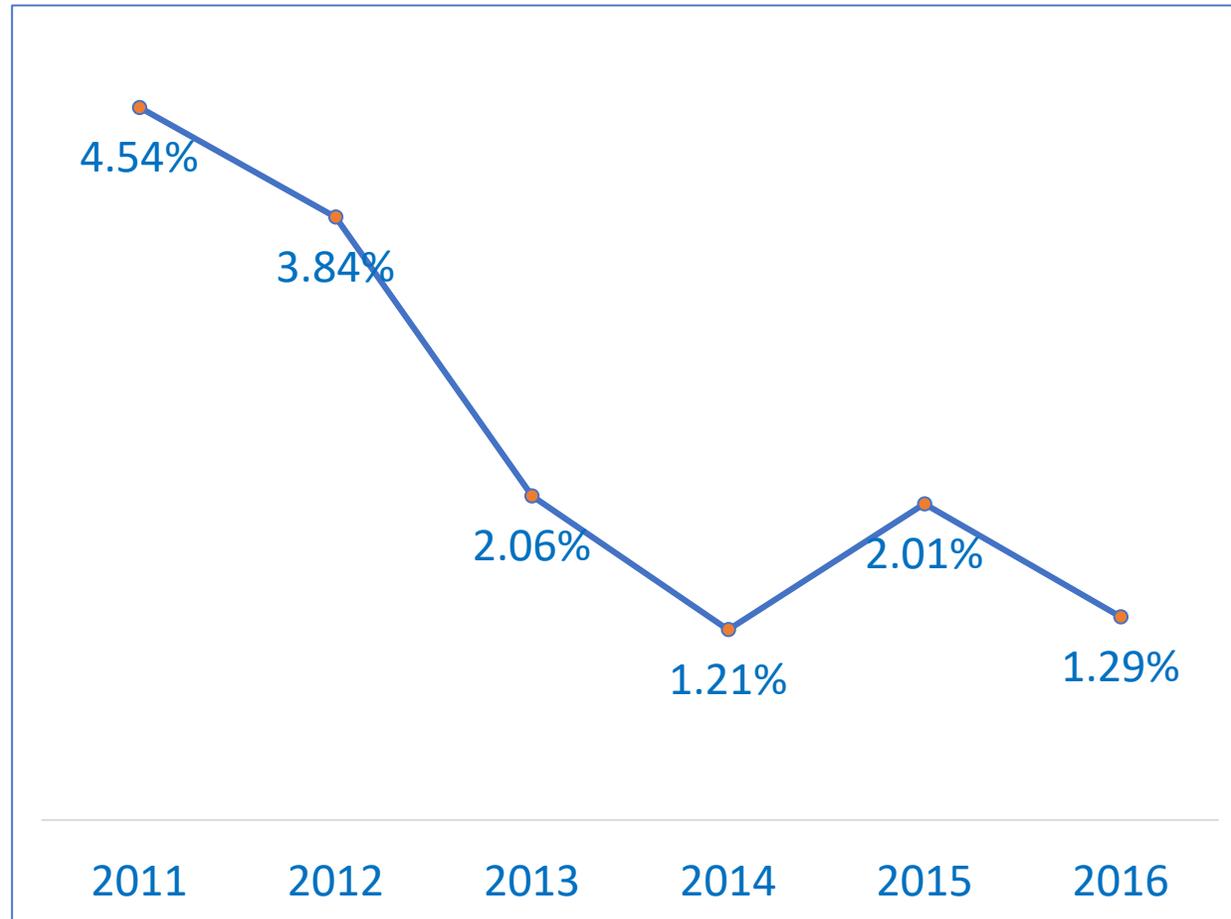
Age structure by region. Source: CIA World Factbook, 2017

Unemployment is decreasing due to the economic boom



Unemployment in Europe. Source: Statista, 2016

Inflation has decreased sharply over the last few years



Inflation rate in Europe, 2011-2016. Inflation per region, 2016; Source: The World Bank, 2017

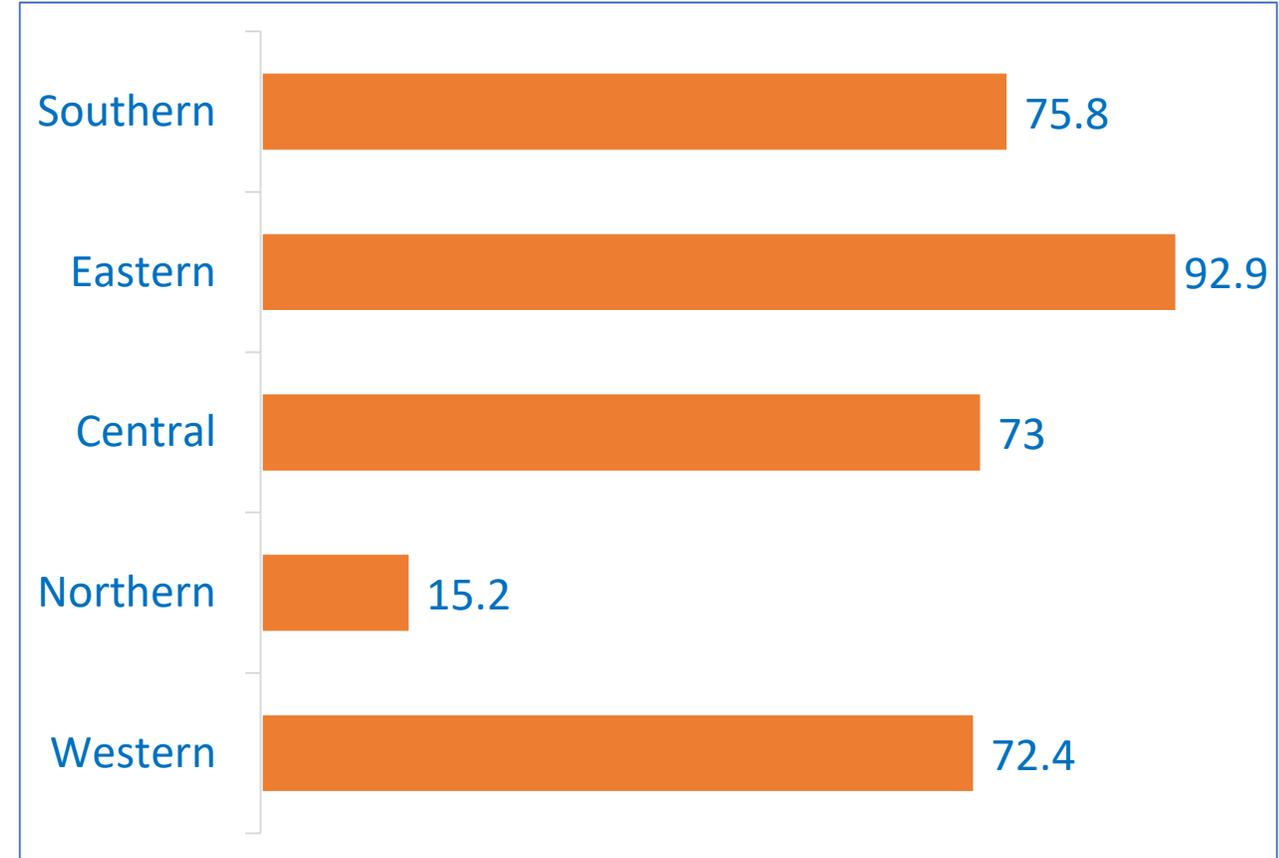
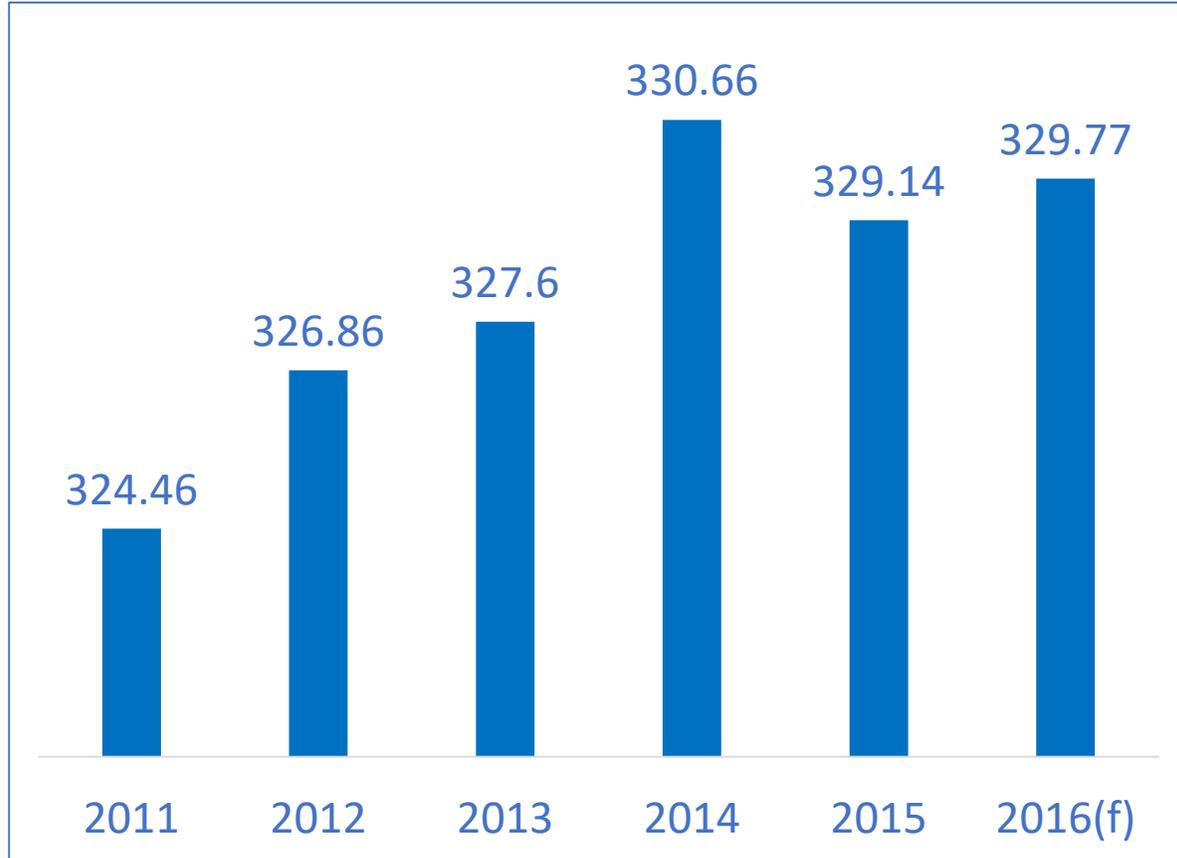
Throughout Europe, shoppers expect a consistent quality of retail experience, whether shopping with the same retailer in a physical store, via their website or through their smartphone. A personalised and connected experience across all channels, as well as friendly and well-informed personnel, raise the bar for retailers. Gaining a holistic view of shoppers, orders and inventory is the essential backbone of connected commerce. The challenge is now for retailers to bring together technology, processes and people to meet consumers' shopping expectations, today and tomorrow.

Pieter Van den Broecke
Managing Director
Benelux and Germany



Source: Consumer and retail survey, Manhattan Associates in 8 European countries, covering 10,000+ consumers and 2,250 retailers across Europe, December 2016

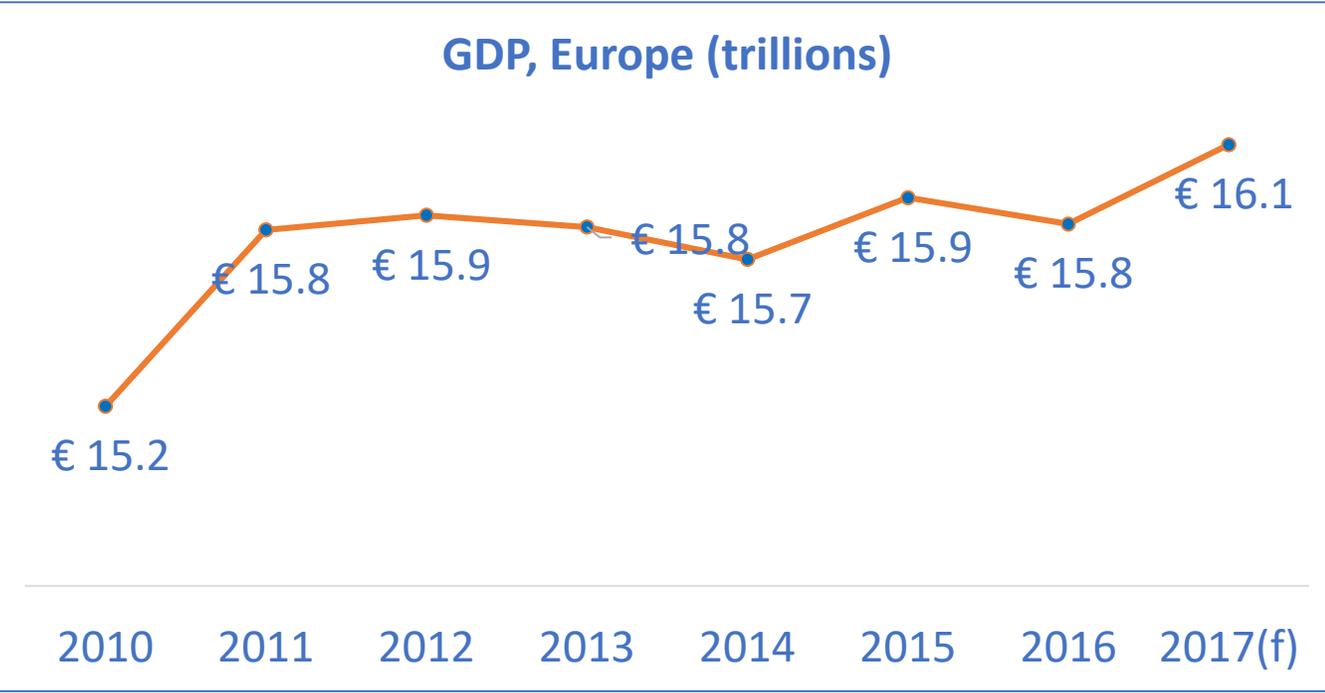
The number of households is increasing steadily



Number of Households in millions, 2011-2016(f). Number of Households per region 2016(f); Source: Eurostat, 2016

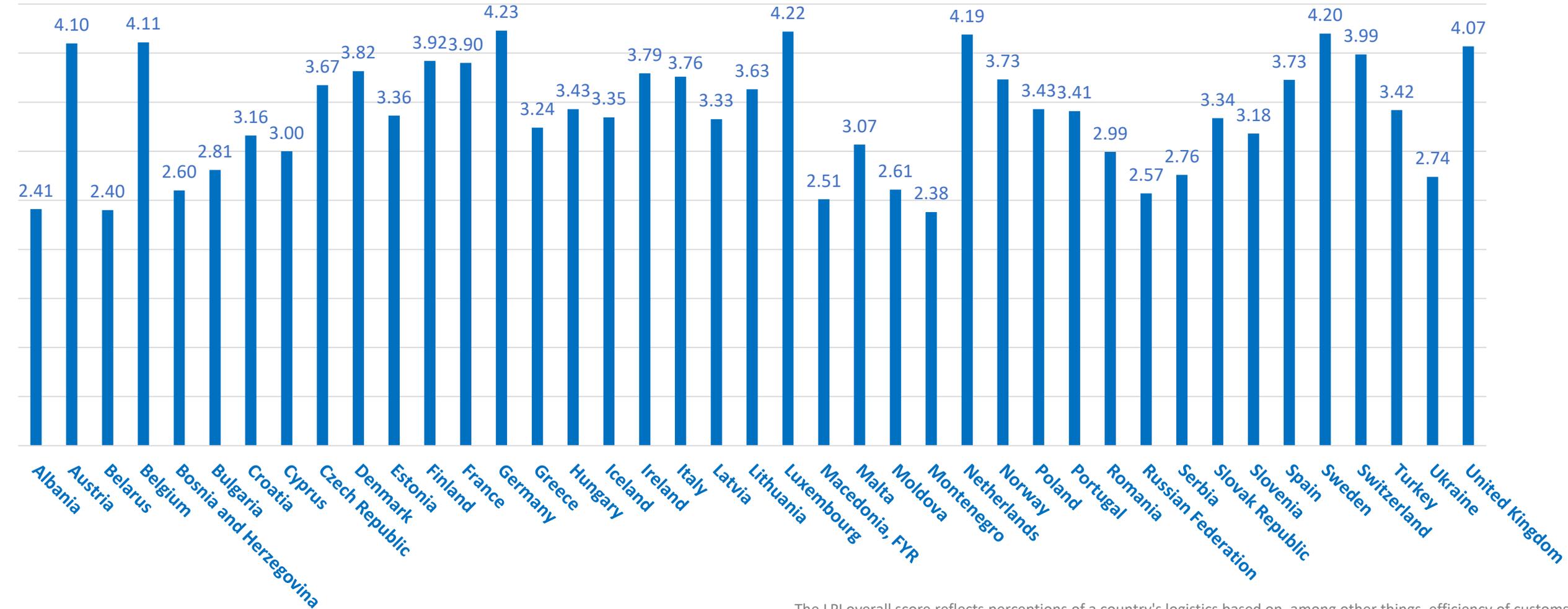
GDP of Europe is 16 trillion and increasing

Region	GDP per capita 2016	GDP per capita 2017(f)
Western	€36,115	€35,071
Northern	€40,439	€41,549
Central	€26,995	€27,536
Eastern	€4,214	€5,199
Southern	€14,732	€14,877



GDP in euros, Europe 2010-2017(f). GDP in euros, per capita, per Region, 2016 and 2017(f); Source: Quandl, 2017; Ecommerce Foundation, 2016 and 2017

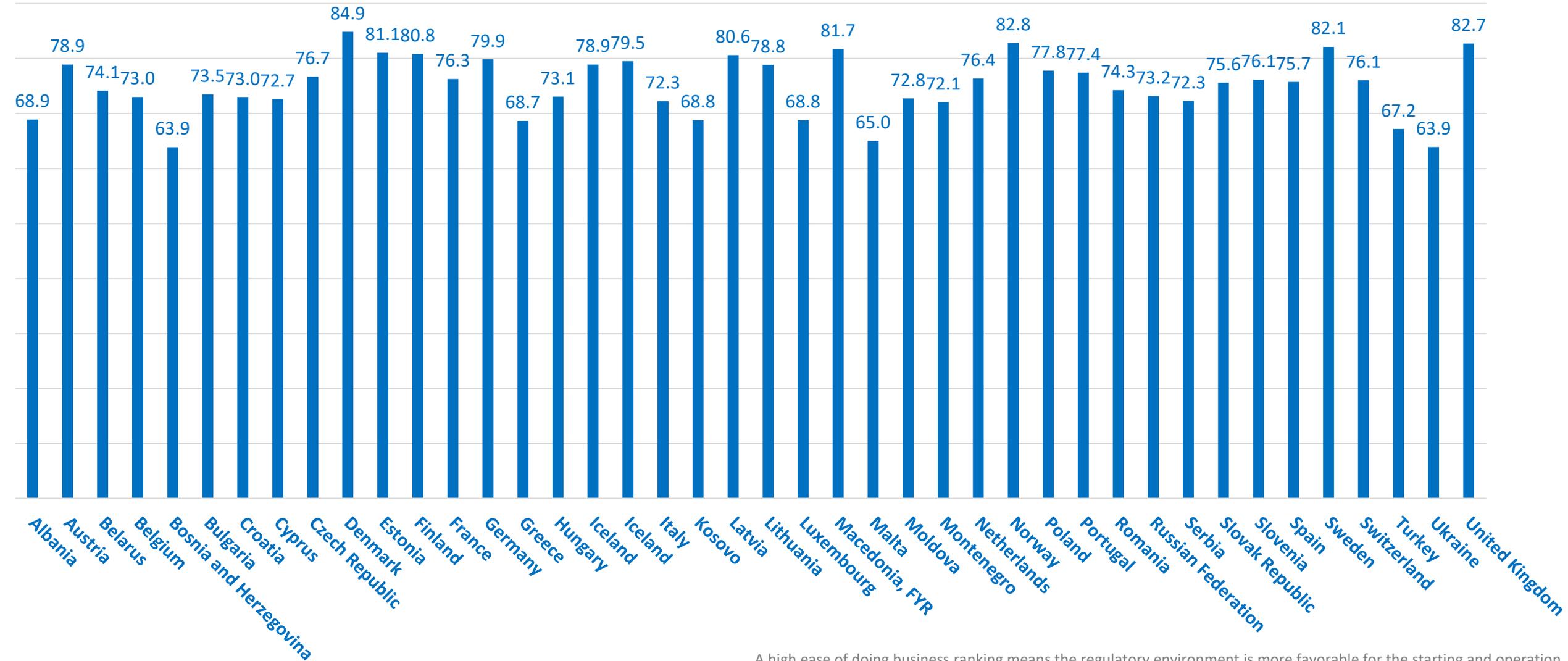
The Logistical Performance differs significantly per country



Logistical Performance Indicators of Europe, per country. Source: World Bank, 2017; United Nations, 2017

The LPI overall score reflects perceptions of a country's logistics based on, among other things, efficiency of customs clearance process, quality of trade- and transport-related infrastructure and ease quality of logistics services.

Europe is moving up on The Ease of Doing Business Index



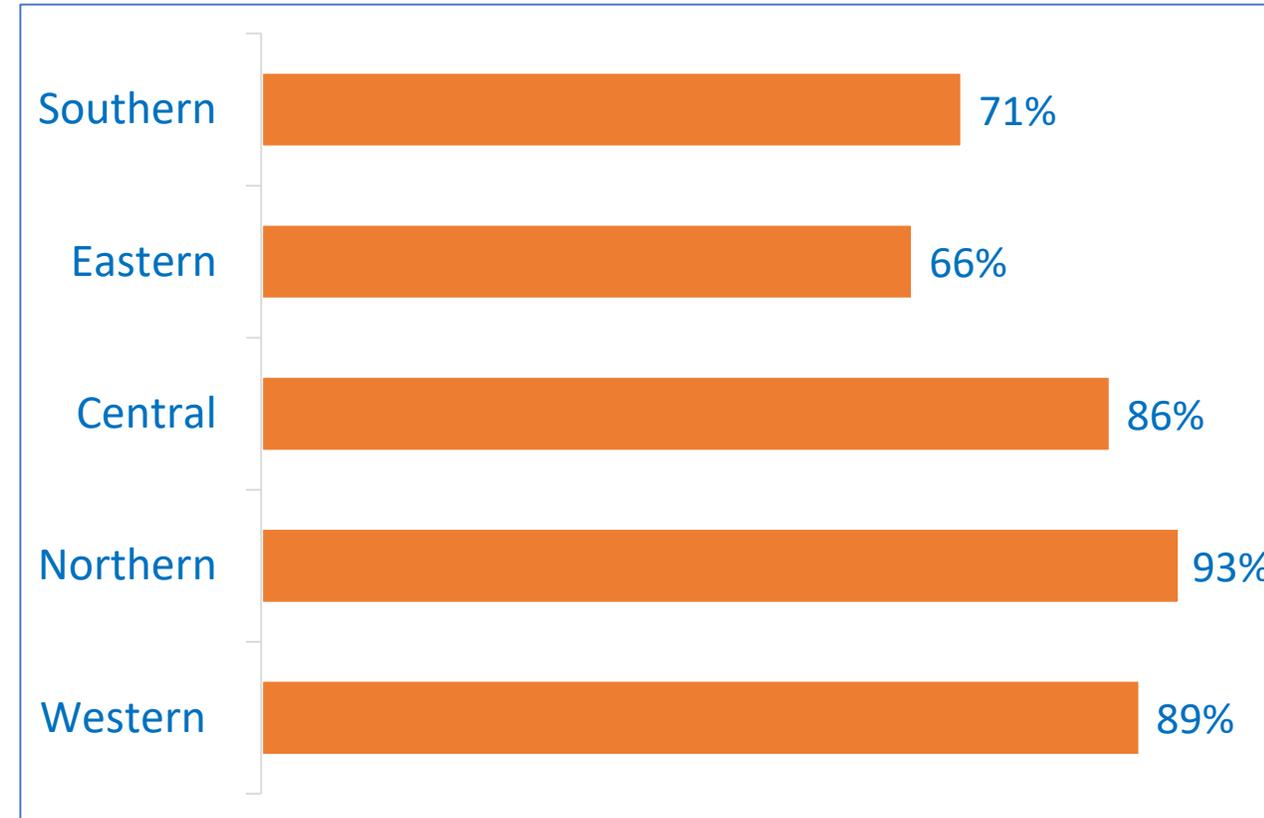
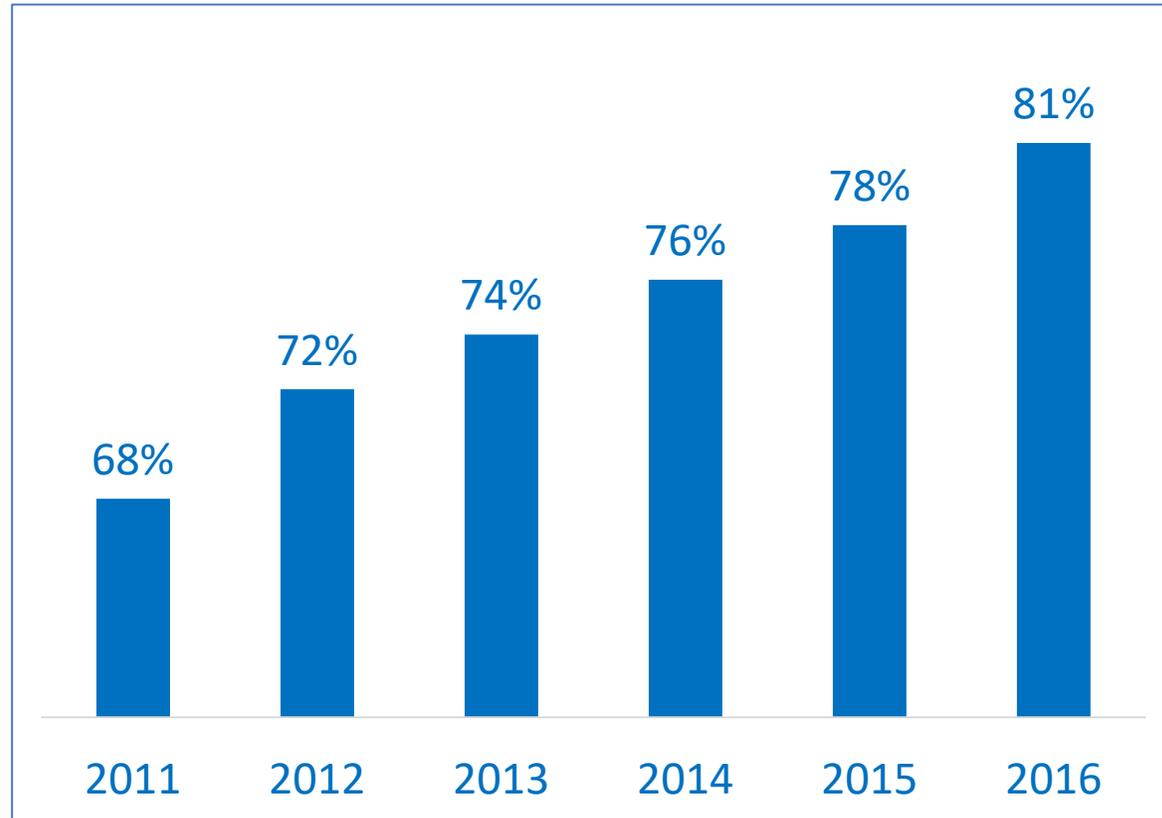
Ease of Doing Business Index, Europe, per country. Source: World Bank, 2017; United Nations, 2017

A high ease of doing business ranking means the regulatory environment is more favorable for the starting and operation of a local firm. The rankings are determined by sorting the aggregate distance to frontier scores on 10 equal topics.



European Ecommerce Facts & Figures

Internet penetration in Europe is steadily increasing



Internet Penetration in Europe, 2011-2016. Internet penetration per region 2016; Source: Eurostat, 2016

Norway has the highest penetration, Ukraine the lowest

TOP 12 COUNTRIES

Countries	Internet access*	Online population
Europe	77%	631.3mn
EU28	83%	434mn
Top 12	92%	187.44mn
Norway	100%	5.27mn
Iceland	99%	.328mn
Denmark	98%	5.57mn
Estonia	96%	1.25mn
Netherlands	95%	16.13mn
Sweden	93%	9.16mn
Finland	93%	5.13mn
United Kingdom	93%	60.6mn
Luxembourg	92%	.53mn
Switzerland	90%	7.54mn
Germany	89%	71.8mn
Ireland	89%	4.2mn

LOWEST 5 INTERNET ACCESS

Countries	Internet access*	Online population
Lowest 5	57%	81.65mn
Ukraine	49%	21.86mn
Turkey	57%	45.38mn
Bulgaria	60%	4.26mn
Greece	66%	7.2mn
Croatia	70%	2.95mn



Internet penetration as share of total population. Source: Worldbank, 2016; Eurostat, 2016

Tracking is as crucial to the shopper as the seller

What is your view on e-commerce in Europe?

European cross-border e-commerce is thriving, and is driving global growth. It was recently revealed that 6% of shoppers in Europe shop online every day. A few things are driving this: internet speeds are improving; smartphone use is increasingly, boosting mobile retail; and logistics networks across Europe are becoming more efficient and integrated.

How will delivery develop in Europe in the next two to three years?

European consumers are expecting more from their online buying experience. In the short term, postal companies that are B2C distribution specialists in their respective countries will be increasingly able to offer a globally integrated network to customers. Quality will improve, customer prices will come down and that should boost cross-border traffic across Europe. This promises to underpin further growth in the European market.

What are the main challenges with delivery at the moment in Europe?

The biggest challenge currently facing international e-retailers is the need to grow outside their borders and drive international expansion; to deal with the increasingly complex customs environment; and to meet customer expectations on tracking. Timely delivery is crucial but being able to track an order's progress and electronic notification of delivery is equally important. So tracking of goods is no longer 'a nice to have', it's a necessity.

It's for that reason that at Asendia we offer the Fully-tracked Goods Service, which combines the convenience and flexibility of national postal networks, with the peace of mind of full traceability.

Renaud Marlière
Chief Marketing & Sales Officer at Asendia

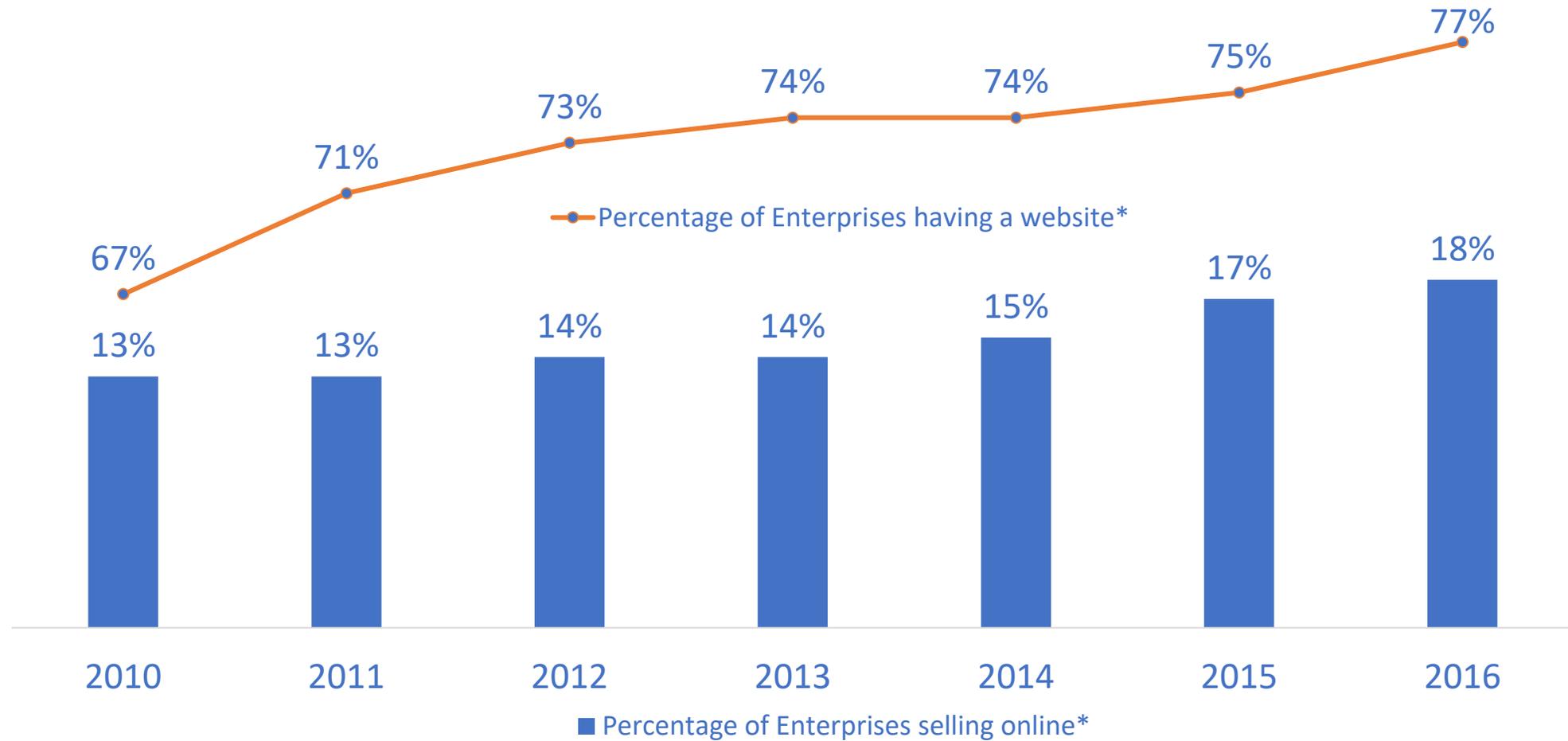


To prepare for the nearby future, focus on GenZ! The next generation of consumers are the i-Brains. They are the first generation that is fully merged with smart phones and social media. These digital natives will be leading edge consumers that drive (mobile) disruption. And they will come fast. In 2020 the i-Brains will represent 40% of all European consumers.

Marco Wolters
Global Industry Lead | Fashion, Home & Lifestyle



The number of companies selling online is increasing



Enterprises with websites and enterprises selling online, EU 28, 2010-2016 (% of all companies). Source: Eurostat, 2016

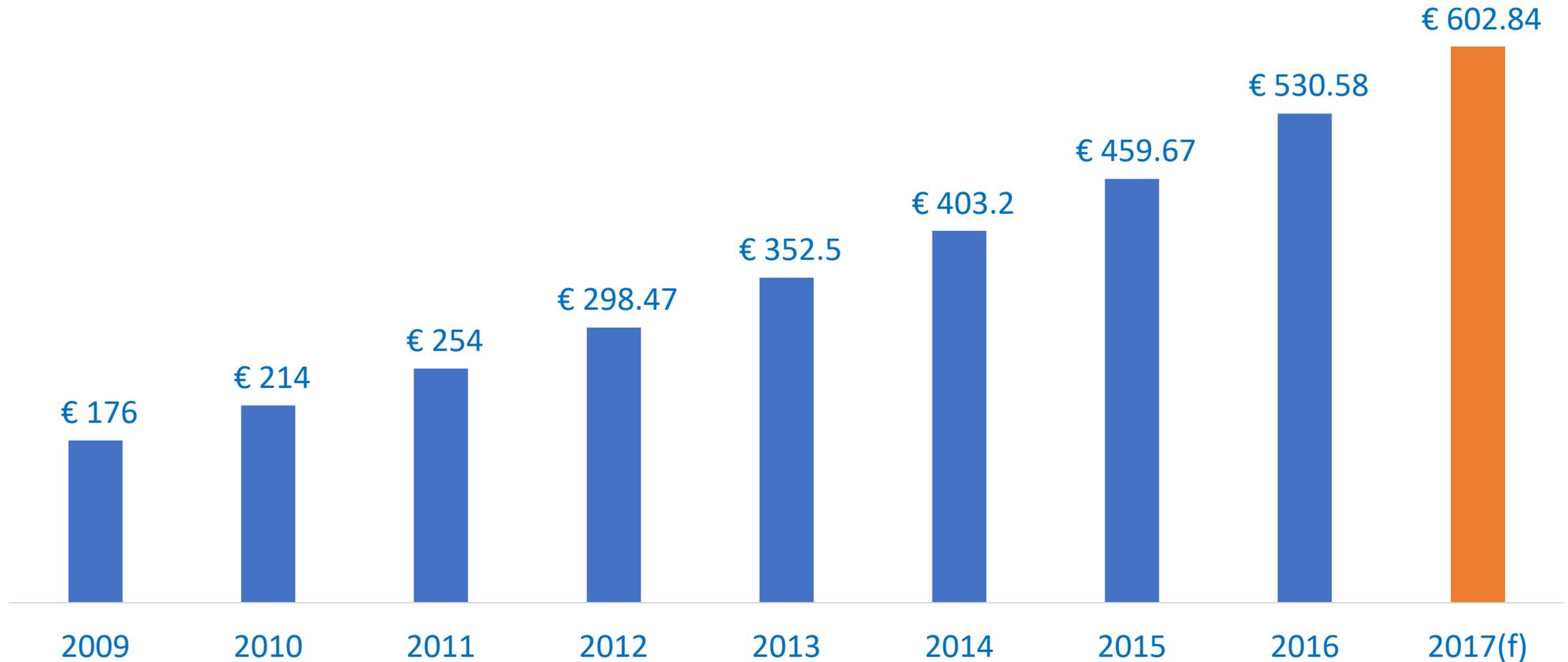
*Including only enterprises with 10+ FTE; excluding financial sector

Amazon is still the leader in online sales for Western Europe

Company Name	Core European Market	Online turnover in Europe (2015, € billions)	Change in Internet Sales: Western Europe 2012-2015*
Amazon	Germany	38.5	20.9%
Zalando	Germany	2.3	25.7%
John Lewis	UK	2.1	23.4%
Yoox Net-A-Porter Group	UK	1	23%
Cdiscount/Groupe Casino	France	2.4	21.9%
Next	UK	2.2	15.7%
Apple	UK	6.4	17.3%
Metro Group	Germany	1.6	17%
ASOS	UK	1	34.3%
Ocado	UK	1.4	15.3%
Dixons Carphone	UK	3.9	8.8%
Migros	Switzerland	1	67%
J Sainsbury	UK	1.7	10.4%
Royal Ahold	Netherlands	1.1	17.1%
Home Retail Group	UK	1	9.4%

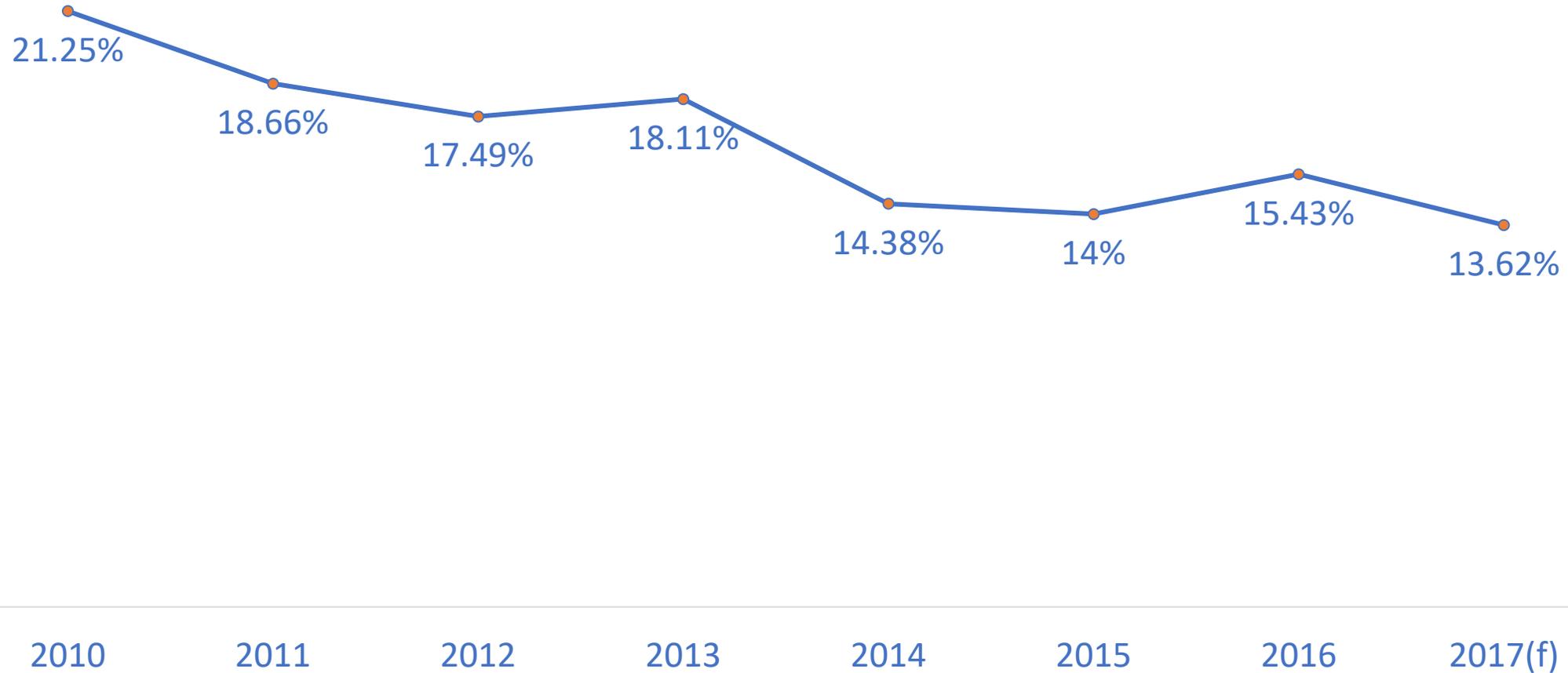
Internet Retailers Ranking for Western Europe, 2015 and 2016. Source: Fung Global Retail & Tech, 2017

B2C Ecommerce is expected to increase to €602 billion in 2017



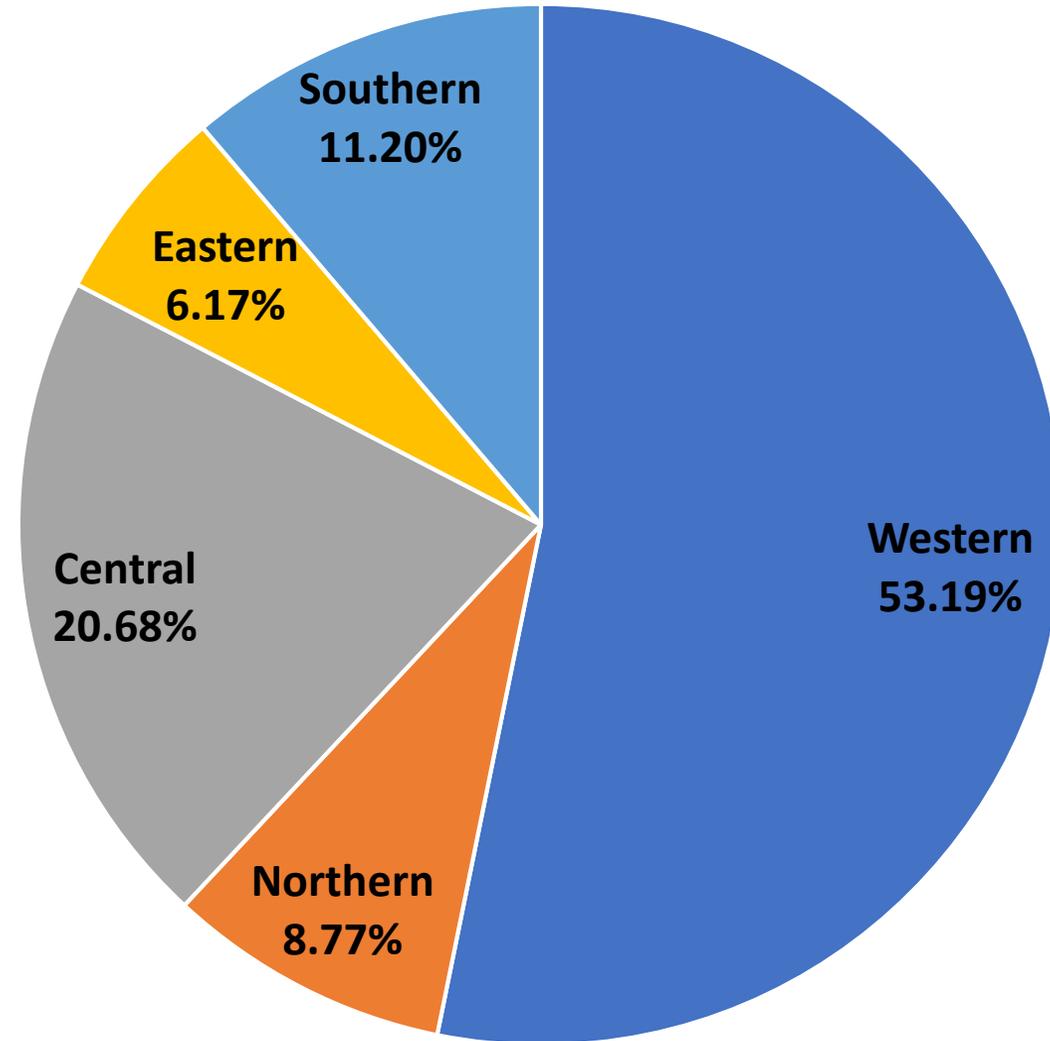
Ecommerce Sales, Europe 2009-2017. Source: Ecommerce Foundation, 2017

Ecommerce growth is declining, but remains strong



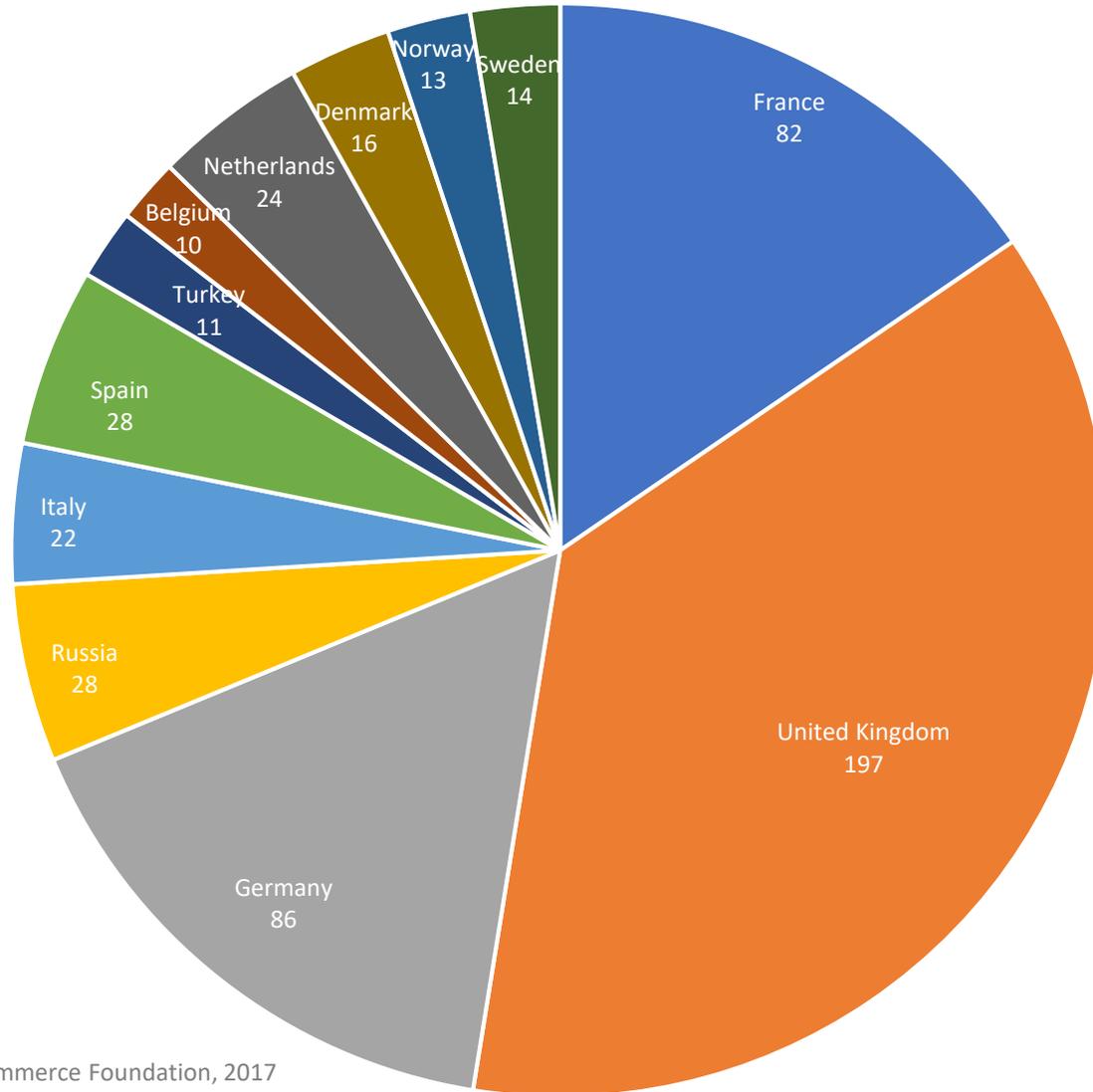
Growth of ecommerce Sales 2015-2016, Europe. Source: Ecommerce Foundation, 2017

Western Europe is the largest market for Ecommerce



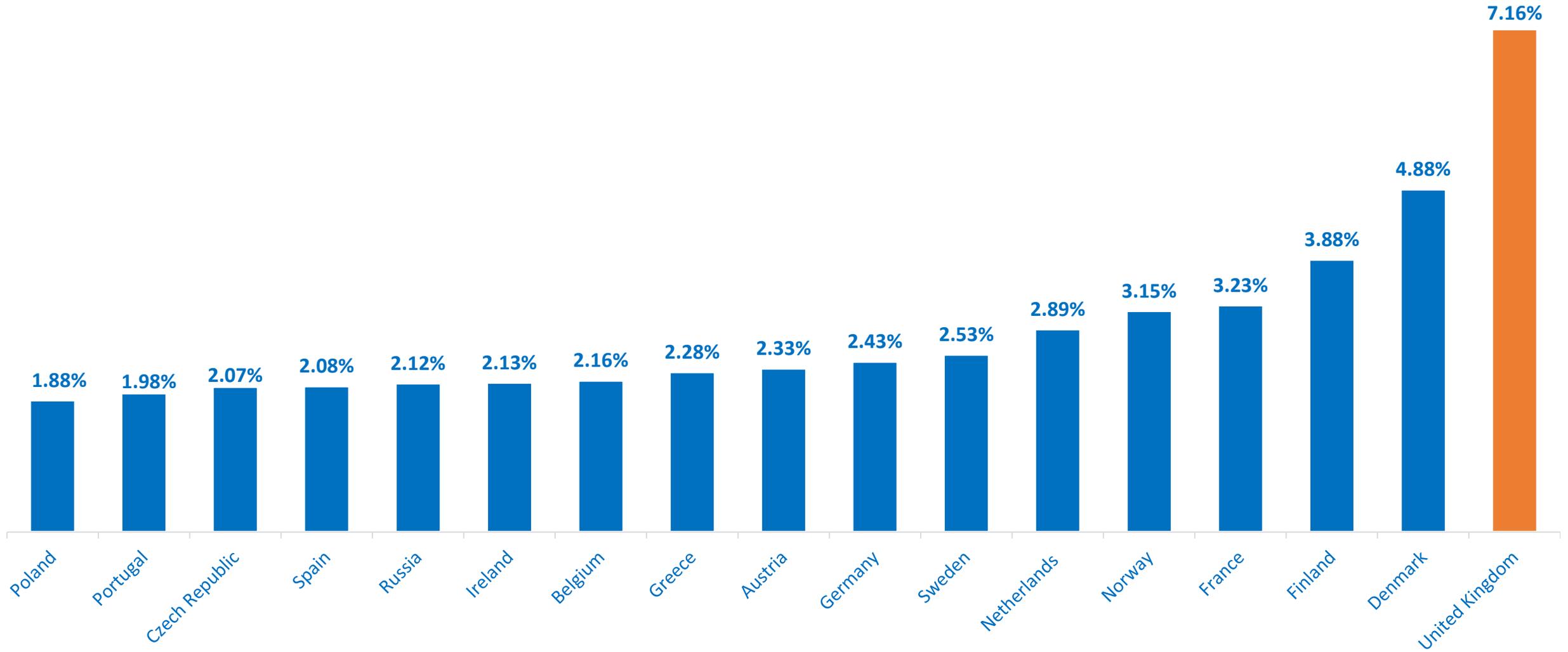
Percentage of total Ecommerce Sales per region, Europe, 2016. Source: Ecommerce Foundation, 2017

The U.K. still has largest ecommerce market



Ecommerce Sales per region in billions of euros, Europe, 2016. Source: Ecommerce Foundation, 2017

The U.K. has the highest E-GDP



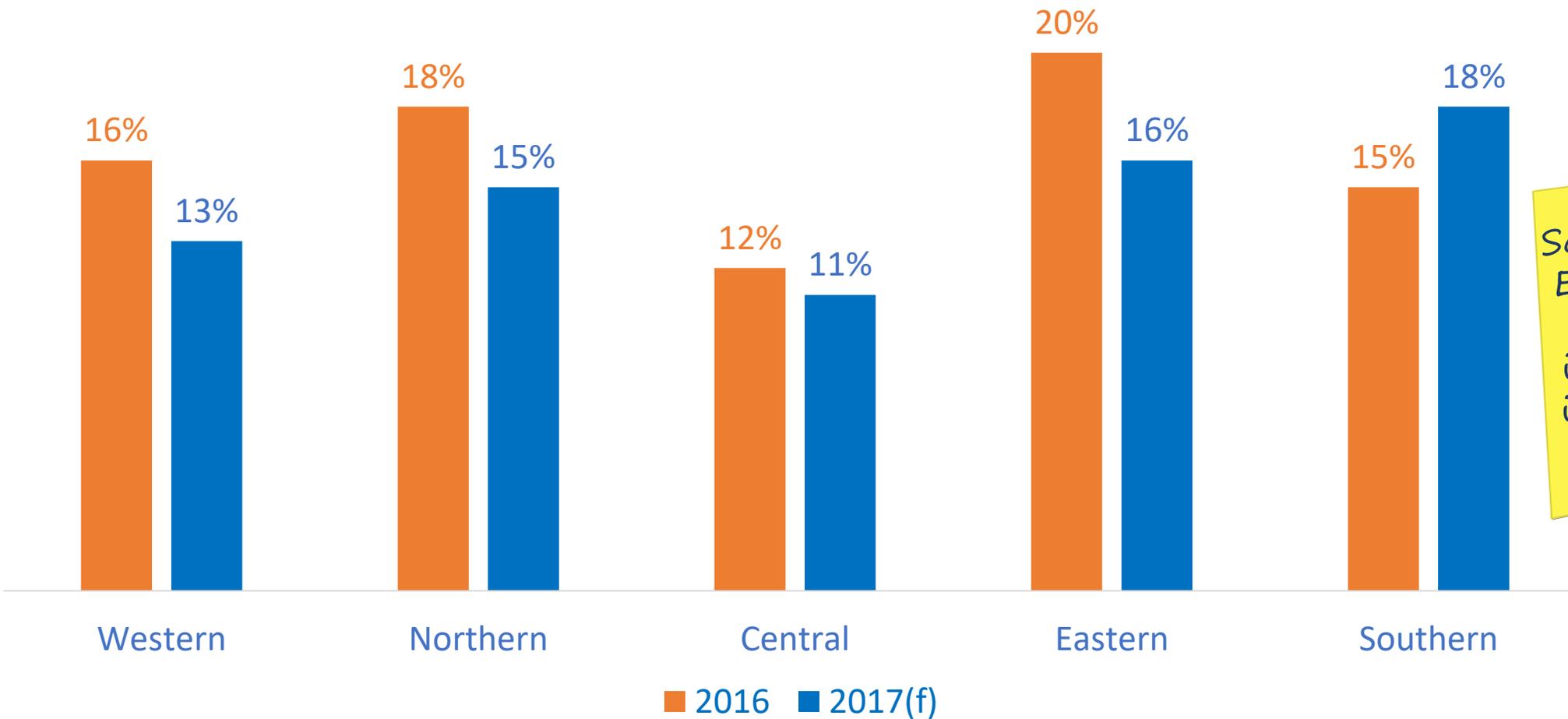
Ecommerce Sales as percentage of GDP, top 17, 2016. Source: Ecommerce Foundation, 2017

Ecommerce in Europe is very dynamic and we observe very distinct stages of this development by country, impacting on the overall retail environment. E.g. in some South Western European Countries the early growth phase of online shopping drives the markets. In other more mature online markets a second impulse can be observed, triggered by the results of the disruptive impact that ecommerce had during the last decade on the retail scene.

Markus Tuschl
Global Director Digital Retail



Southern European Ecommerce is on the rise

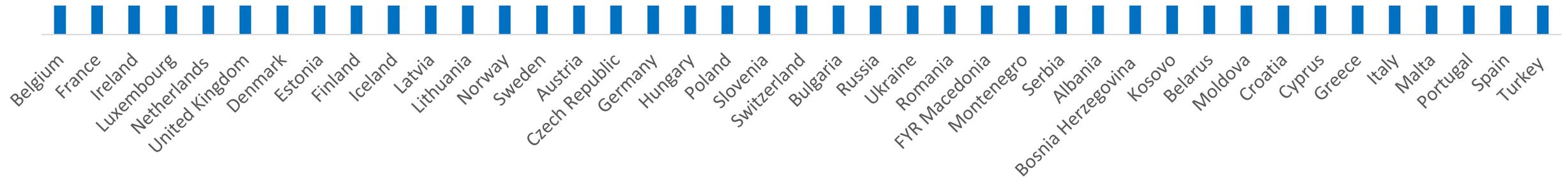


Southern European Ecommerce growth is expected to increase from 15% in 2016 to 18% in 2017(f)

Ecommerce Sales growth per region, 2016-2017(f). Source: Ecommerce Foundation, 2017

The ecommerce growth rate differs strongly per country

Full version available at
www.ecommercefoundation.org/reports



Ecommerce Sales growth rate per region, 2016. Source: Ecommerce Foundation, 2017

Ecommerce successfully rests on Innovation and Attitude

Technology is key. Whether AI-powered chatbots that drive conversion through personalized communications, contextual ecommerce in-the-moment, shorter delivery times or seamless processes, winning innovations are all focused on delivering great experiences.

The companies that do best tend to see ecommerce as a strategic rather than a tactical asset. Instead of outsourcing online operations they build in-house expertise so they can run cloud-based solutions on their own terms. Doing this well means investing in a flexible, modern platform – plus of course talented people who can make the most of it – rather than focusing on a single-fix solution.

Ultimately, it's about creating meaningful, personal interactions for consumers. Think about what sort of customer experience you expect in your own daily life. These are the benchmarks you should aim to beat. And to do this, you need to be able to manage the customer profile in real time, using contextual, in-the-moment commerce to reach them on multiple platforms throughout their journey.

For the people at the steering wheel, I've got one piece of advice: stay on your toes. There's no single right answer. Learning from and adjusting to your customers is a constant process. If you can do that, you'll do well.

Jamie Anderson
CMO, SAP Hybris



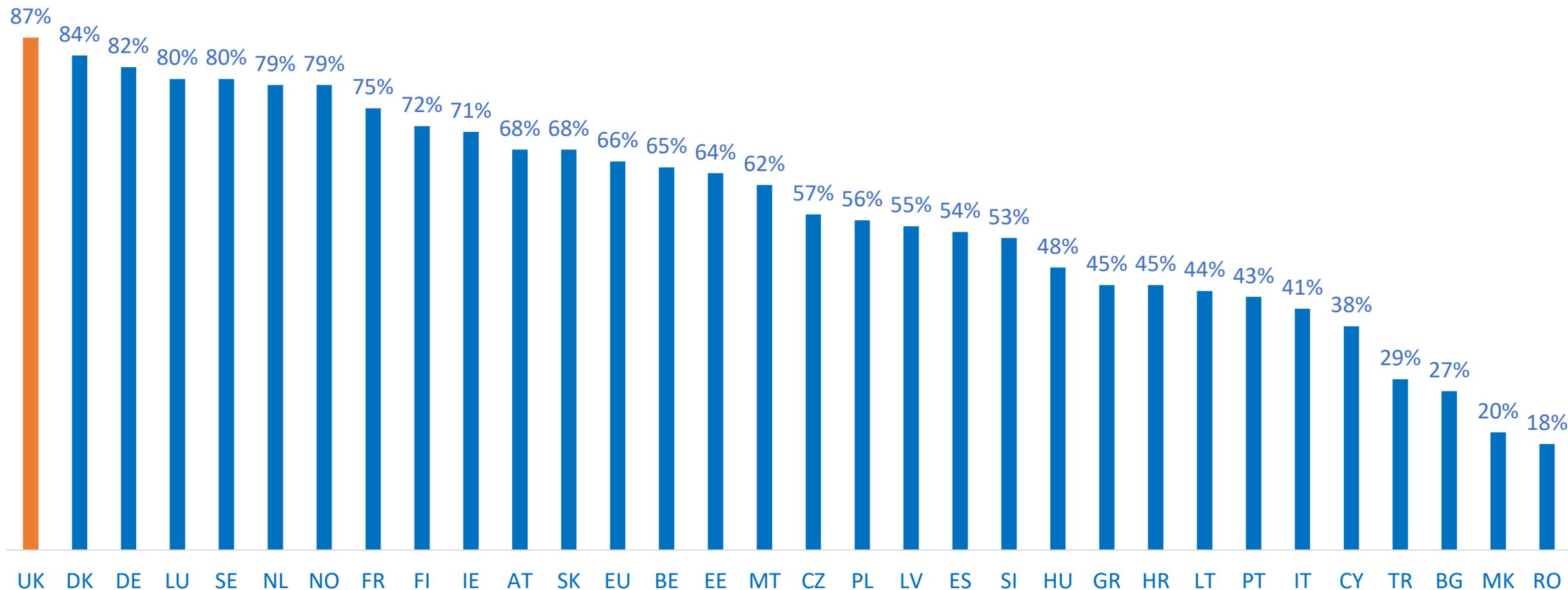
Internet use & online shopping differs strongly across the EU

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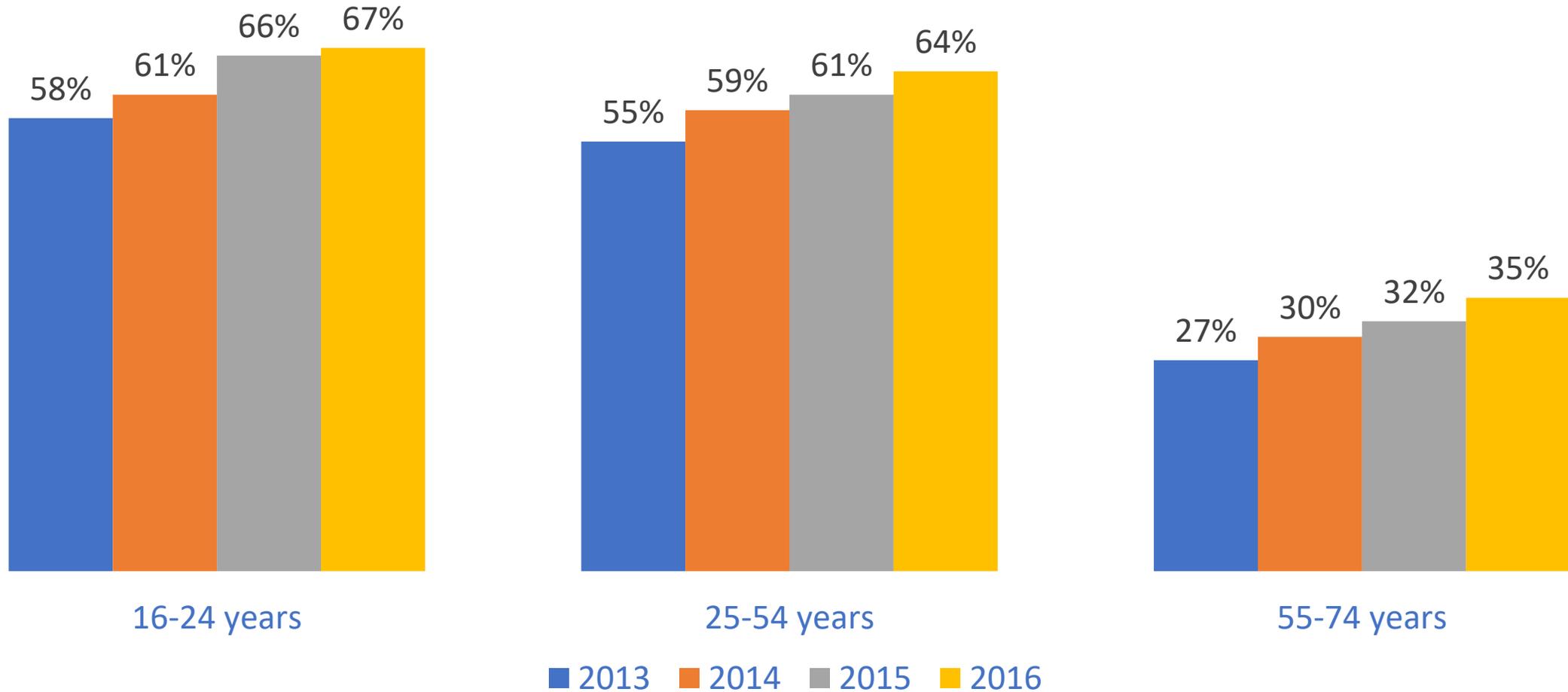
Internet Use and Online Shoppers. Source: Eurostat, 2016

Online shopping ranges from 87% (UK) to 18% (Romania)



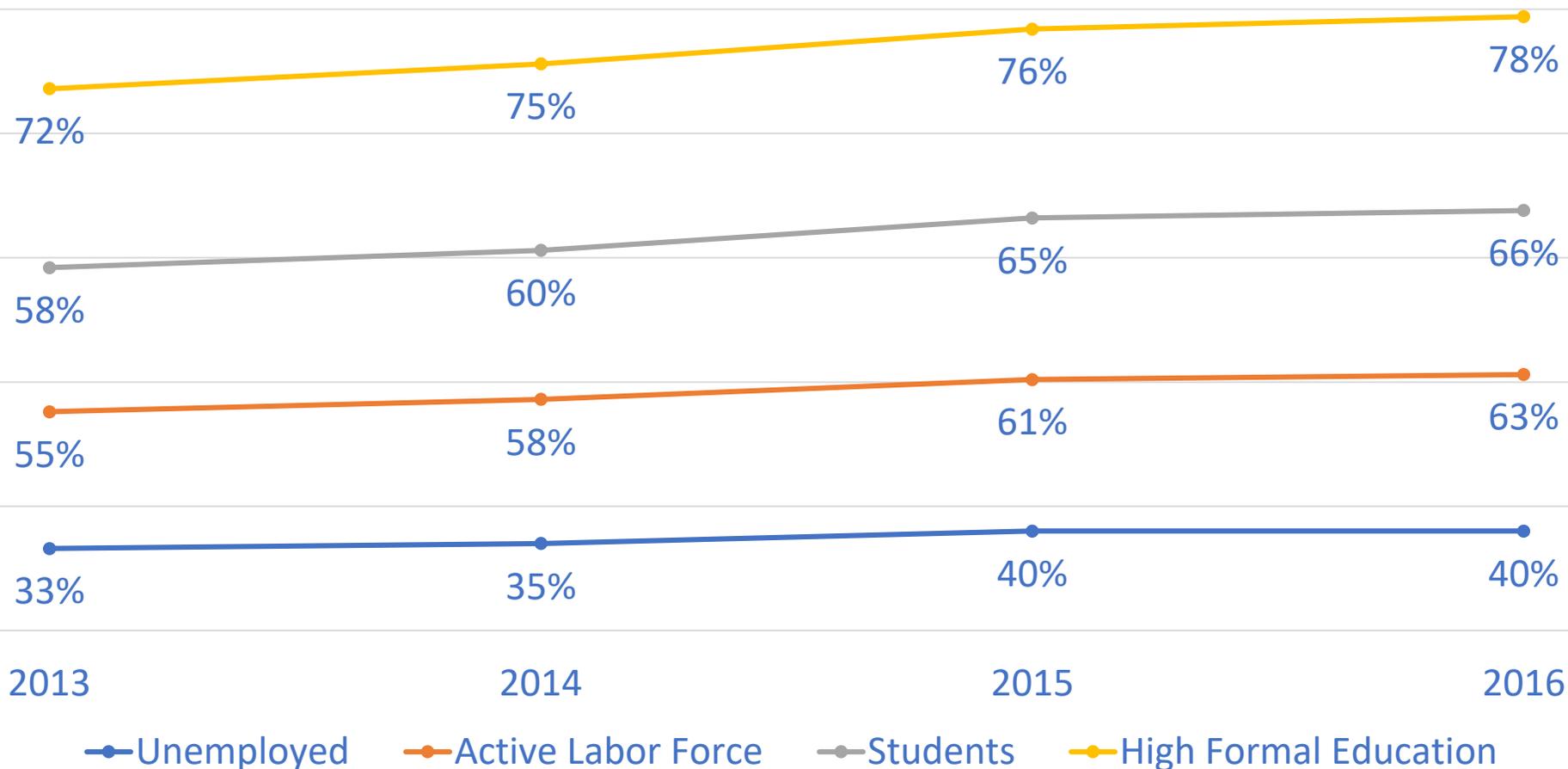
Online shoppers in the previous 12 months, 2016. Source: Eurostat, 2016

16-24 year-olds purchase most frequently online



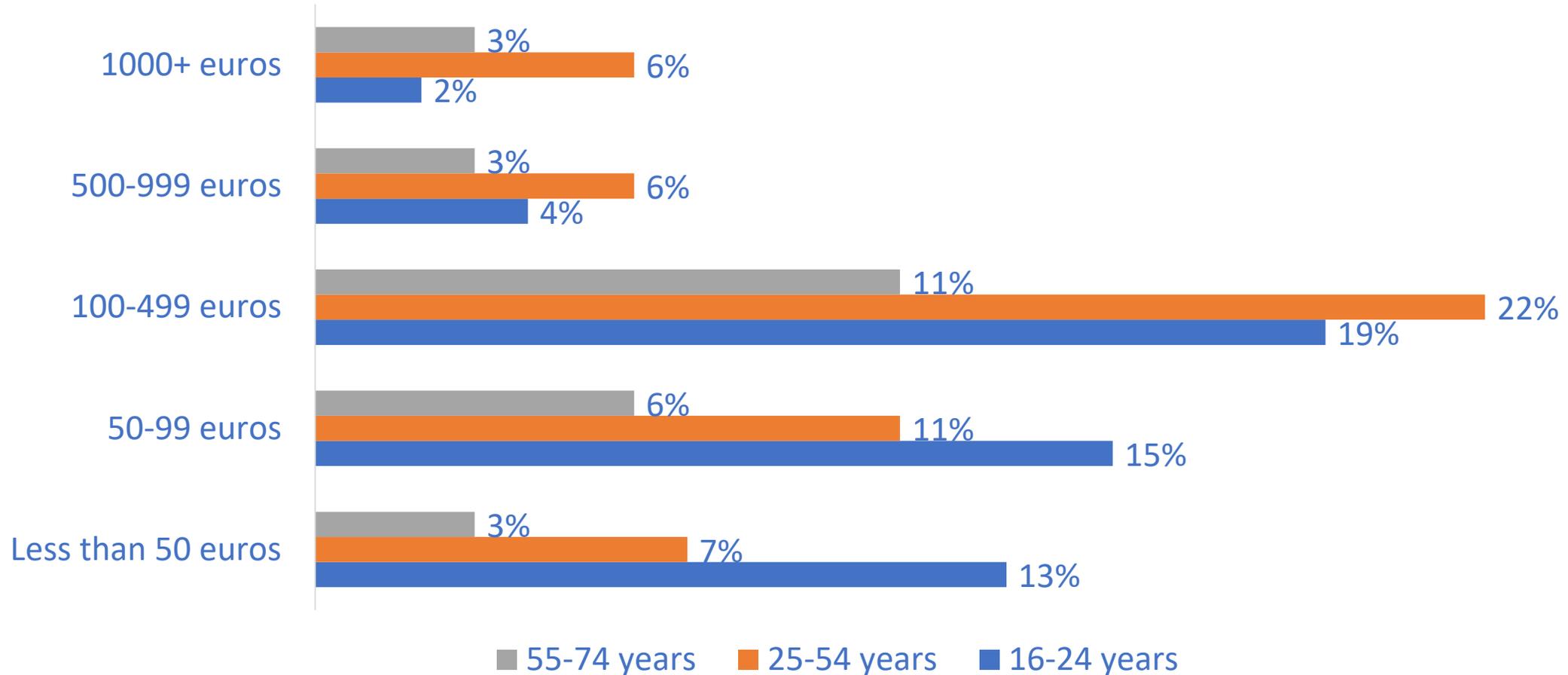
Purchased online in the last 12 months, EU-28, 2013-2016. Source: Eurostat, 2016

Students & higher educated shop online more regularly



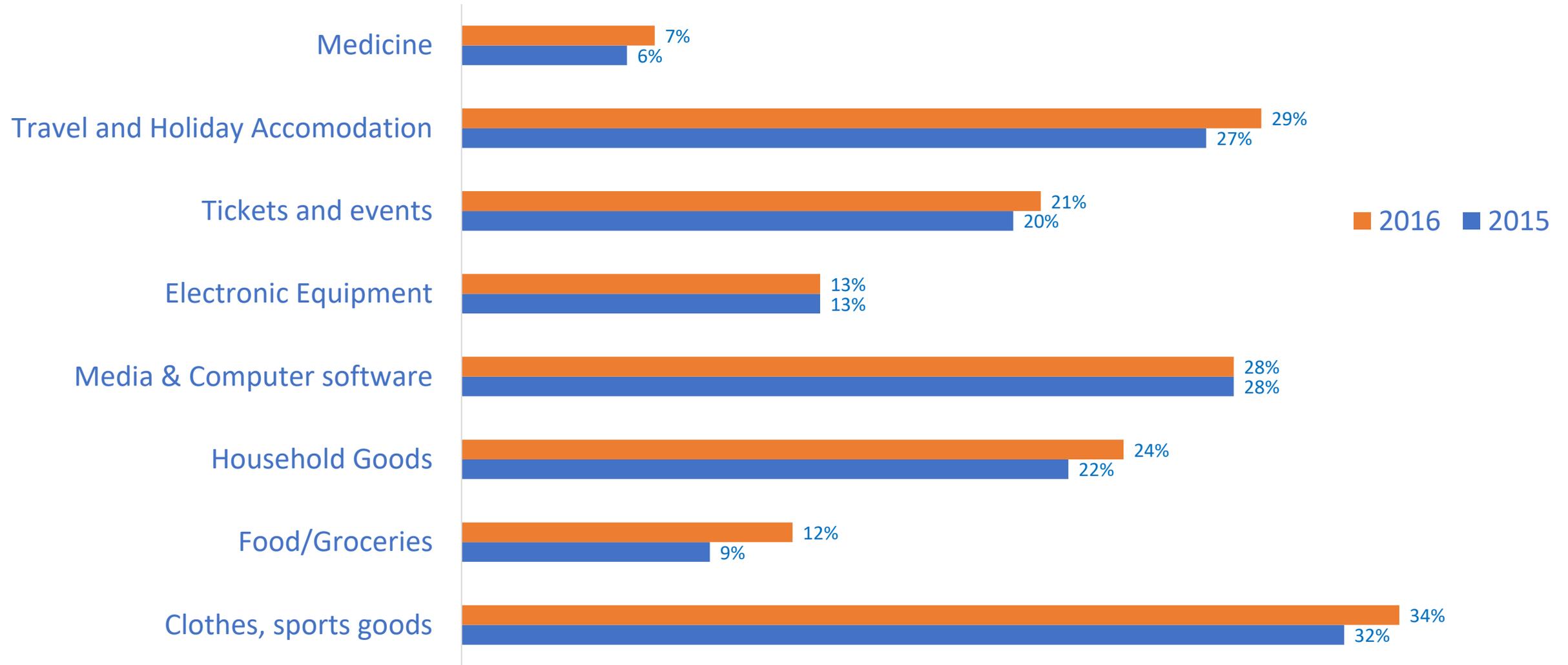
Online shoppers in the previous 12 months, EU-28, 2013-2016. Source: Eurostat, 2016

Most spent between € 100 – € 500 in the last 3 months



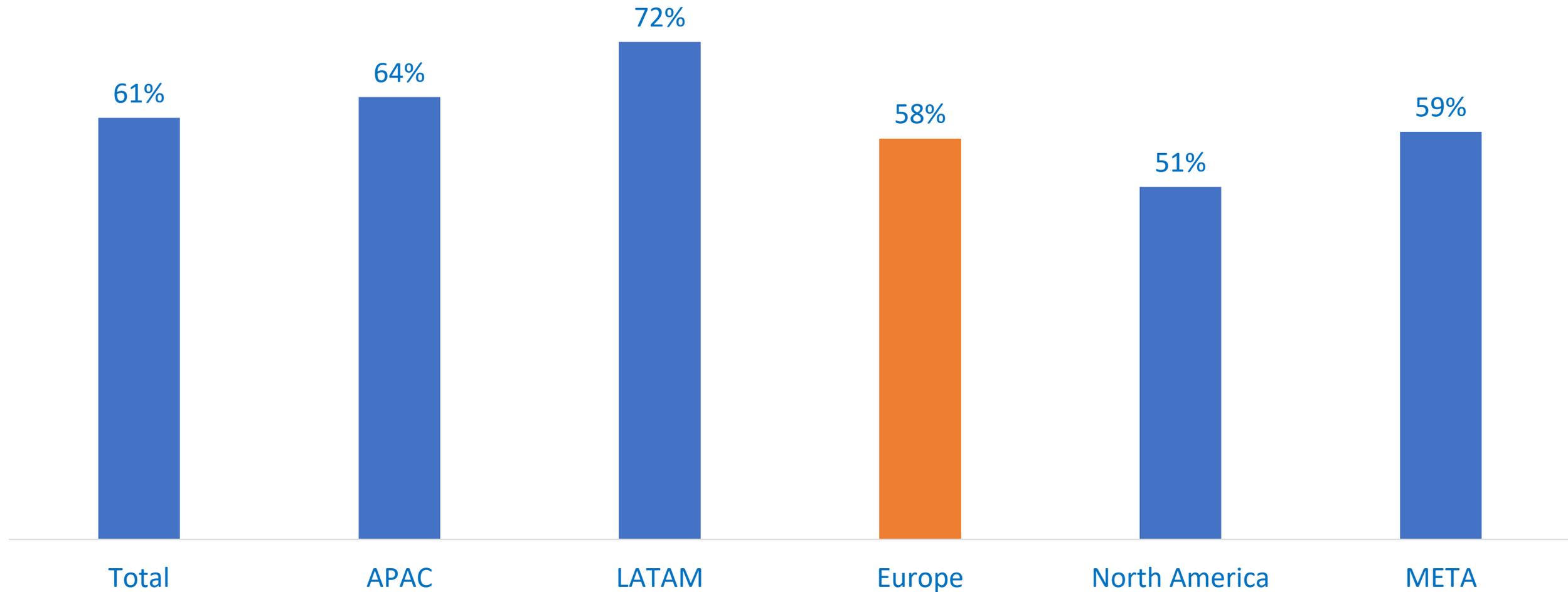
Money spent by online shoppers in the previous 3 months, EU-28, 2016. Source: Eurostat, 2016

Clothes & Sports and Travel are still most purchased online



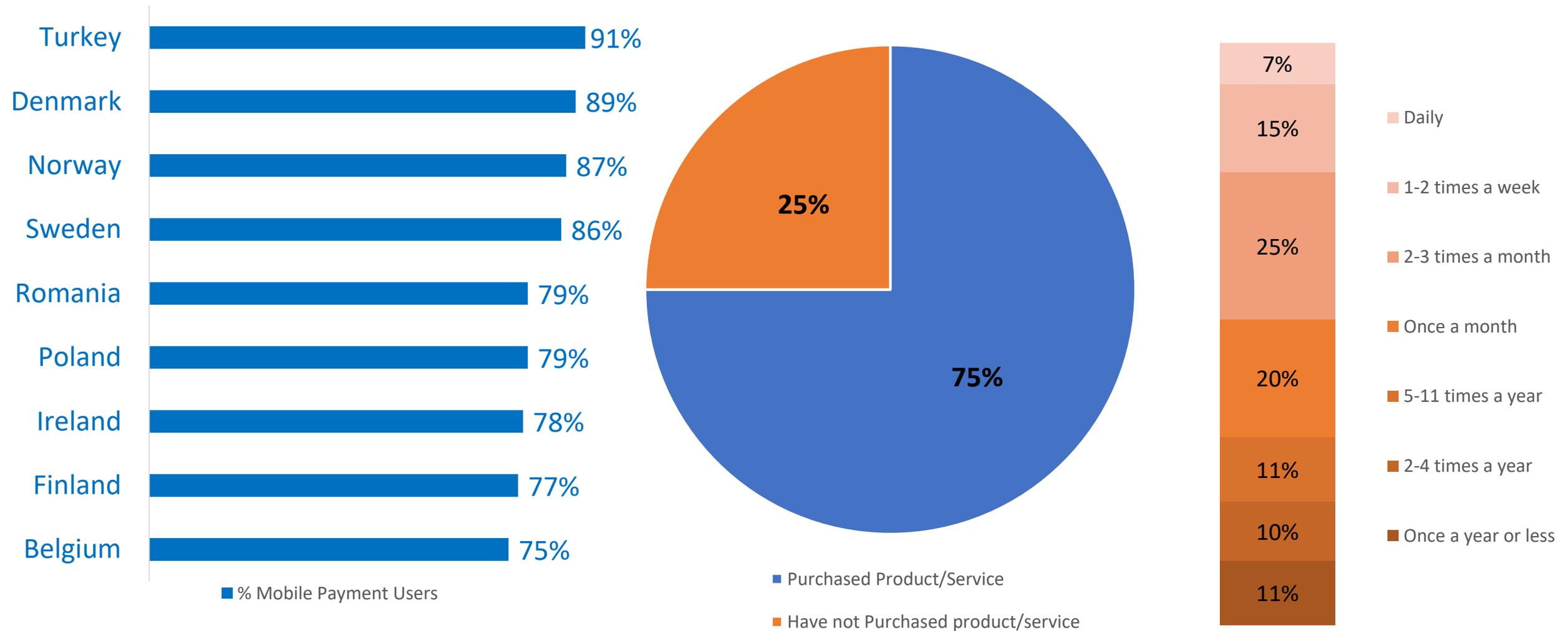
Online shoppers per product/service category, EU-28, 2016. Source: Eurostat, 2016

Compared to Latin America, Europeans are less concerned with price



Source: Gfk, Future Buy 2016, Q: Do you agree with the statement? (% of respondents that answered positively). Base= 20002.

Most Europeans have used their mobile device to purchase online



Mobile Device Usage, Europe: Percent Mobile Payment Users; Percent Europeans Have/Not Purchased online; Frequency of purchasing online with mobile device. Source: IAB, *A Global Perspective of Mobile Commerce*, September 2016

Europeans are average omnichannel shoppers

	Total	APAC	LATAM	Europe	North America	META
Consumer electronics	45.8	44.2	40.1	47.7	50.4	45
Mobile phones	35.2	33.4	32.3	36.6	39.8	35.8
Households washing and cleaning products	19.7	32.3	11.1	16.6	13.5	15.5
Beauty and personal care	34.7	47	26.2	32.4	27.2	28
Packaged food and beverages	21.9	39.2	11.9	16.3	13.3	14.4
Toys	50.3	52.9	43.3	52.5	50.4	43.6
Small home appliances	42.1	41.9	32.2	45	42.4	40.6
Clothing/fashion	53	58.1	43.7	54.1	48.3	46.8
Financial Services	38.6	41.5	38.1	36.3	35.3	40.8
Furniture & furnishings	41.4	42.5	42	41.6	47.3	33.5
Baby Care	34.5	40.8	27.4	33.1	31.2	34.1
Major home appliances	38	35.4	40.4	39.5	39.4	36.3
Replacement auto or truck tires	23.6	24.4	23.7	21.6	33.9	23.9

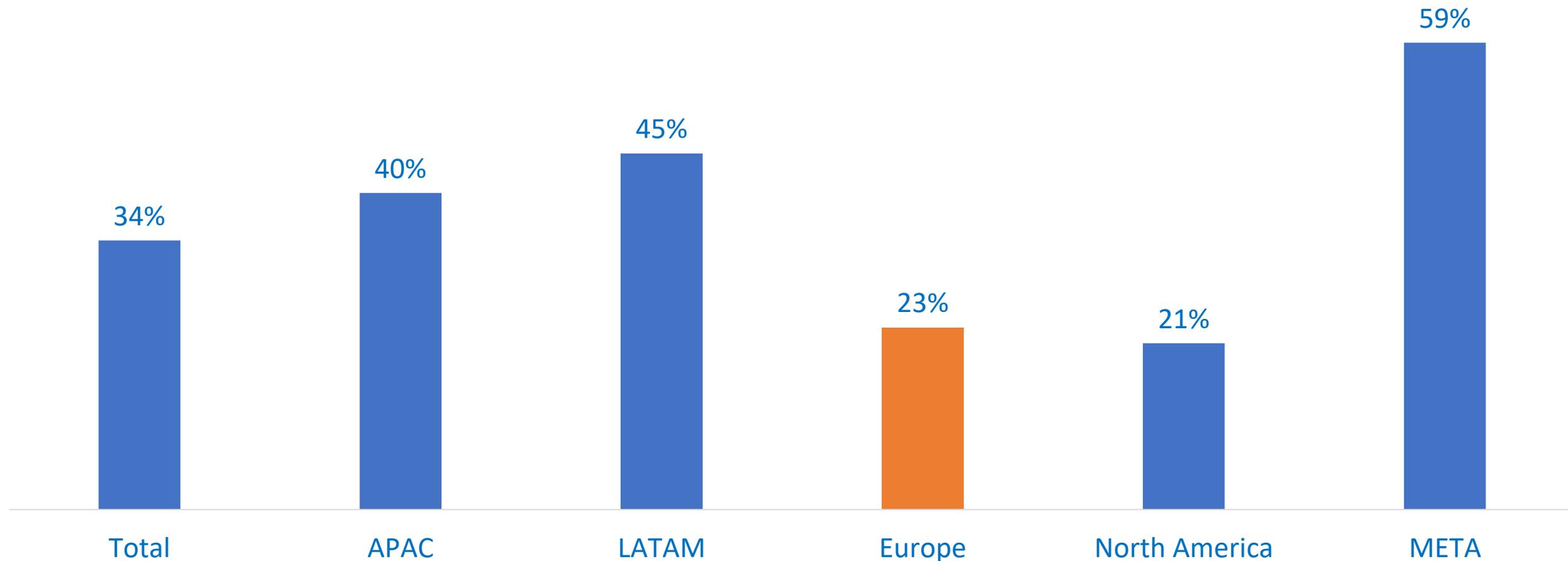
Source: GfK, Future Buy 2016, Q: Have you shopped for each of the product categories both online as well as in store? Base= Category Buyers; Total Sample N=20,002; n=1,000 per country

Europeans love buying phones and financial services online

	Total	APAC	LATAM	Europe	North America	META
Consumer electronics	23.8	23.7	27.4	25.4	22.8	15.2
Mobile phones	26.7	28.3	27.3	30.1	21	14.5
Households washing and cleaning products	4.5	9.9	2.6	2.5	3.1	2.4
Beauty and personal care	6	11.7	5.6	3.6	3.3	3.8
Packaged food and beverages	2.6	4.4	2.7	1.9	1.6	1.7
Toys	12.5	15.8	13.6	11.8	11.5	7.1
Small home appliances	20.8	24.3	25.2	20.1	17.5	13.2
Clothing/fashion	9.8	14.2	8.7	8.8	7.6	4.3
Financial Services	25.5	24.9	18	28.6	25.4	23.7
Furniture & furnishings	10.7	13.3	15.7	9.6	9.1	5.6
Baby Care	10.4	20.3	7.1	5.6	12.9	5.6
Major home appliances	17.8	17.6	20.2	21.1	13.3	6
Replacement auto or truck tires	10.8	8.3	10.6	12.6	11.6	8.3

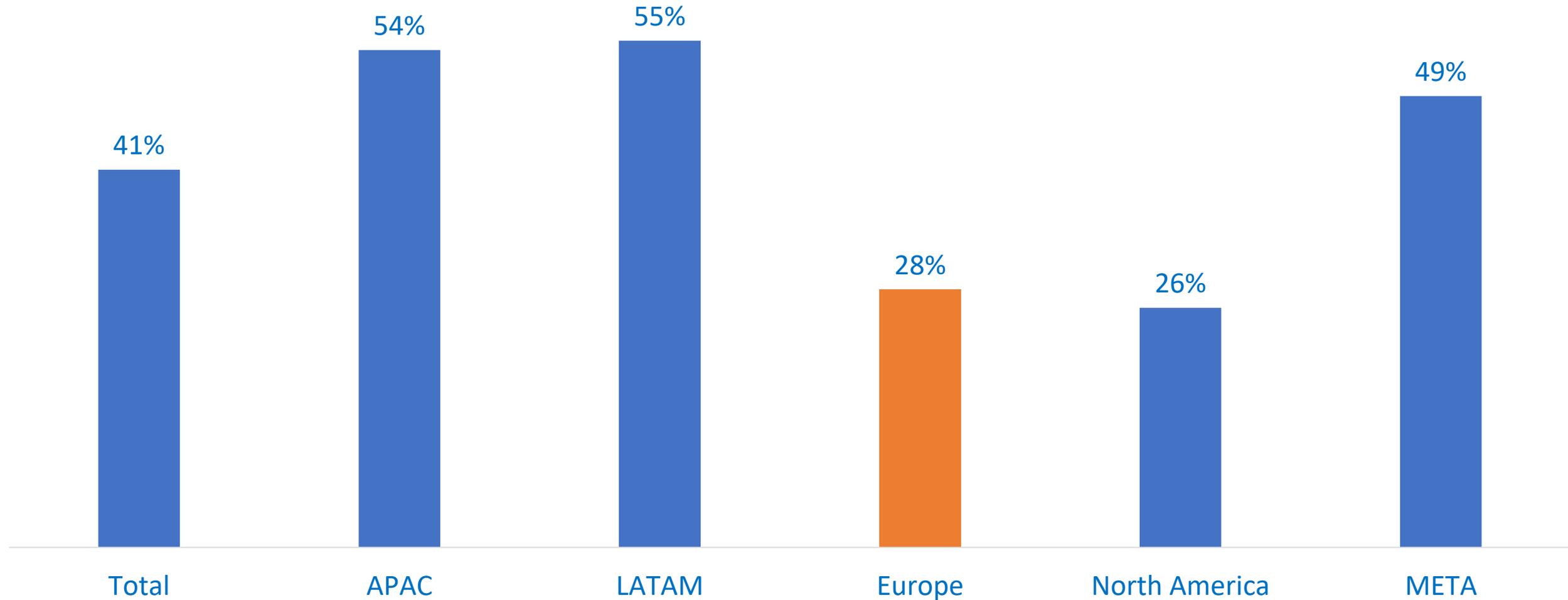
Source: GfK, Future Buy 2016, Q: Have you shopped for the product categories exclusively online? Base= Category Buyers; Total Sample N=20,002; n=1,000 per country

Europeans prefer not to be informed of promotions/deals via mobile



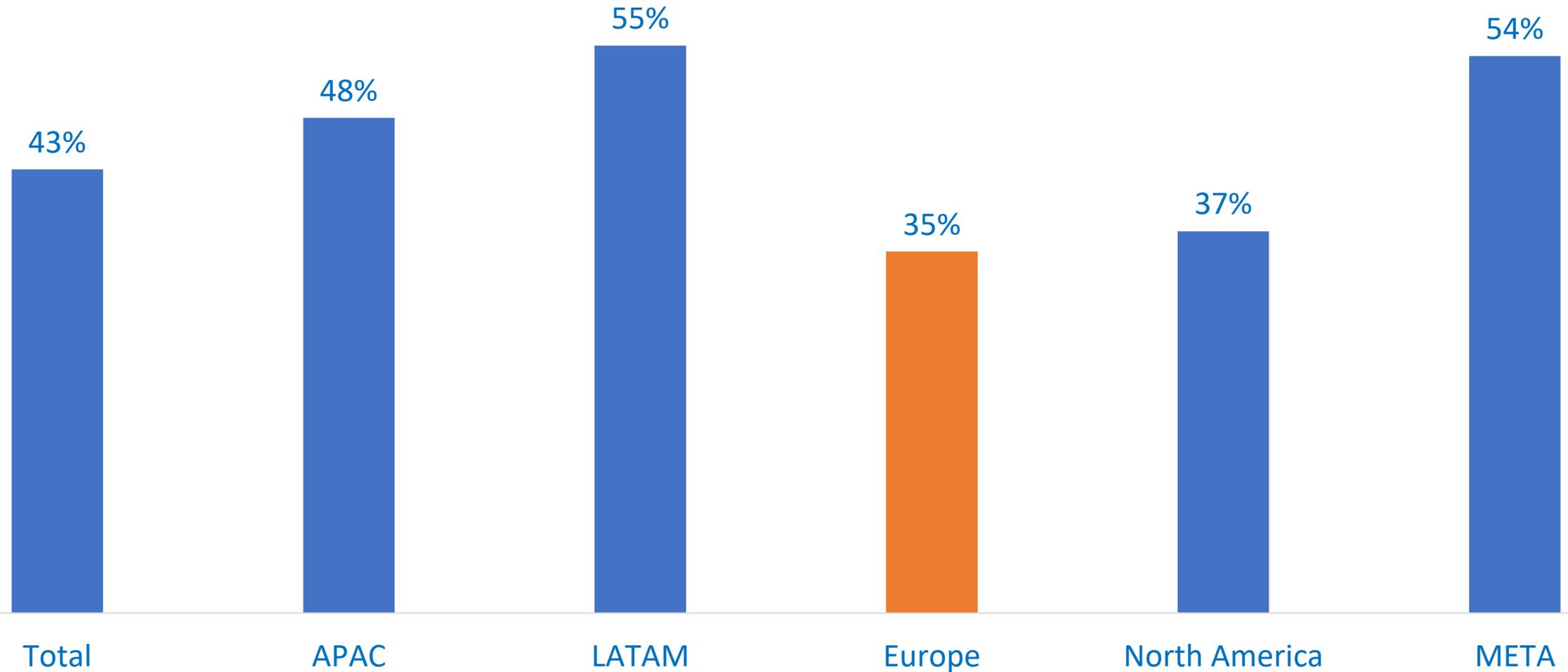
Source: GfK, Future Buy 2016, Q: Do you agree with the statement? (% of respondents that answered positively); Base= 20002

Europeans and North Americans shop the least via mobile



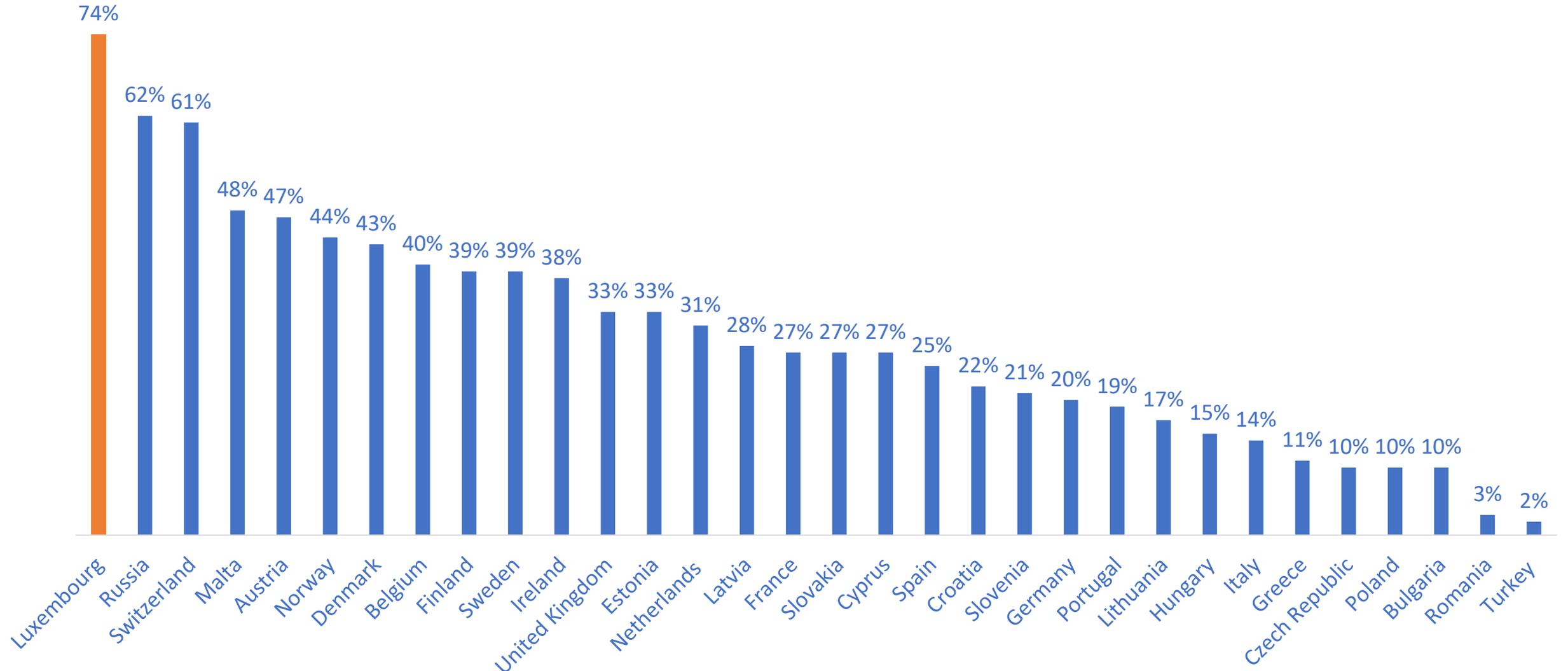
Source: GfK, Future Buy 2016, Q: Do you agree with the statement? (% of respondents that answered positively); Base= 20002

Europeans still prefer physical stores



Source: GfK, Future Buy 2016, Q: Do you agree with the statement? "I can see a future where retail stores are not a big factor in how I shop", (% of respondents that answered positively); Base= 20002

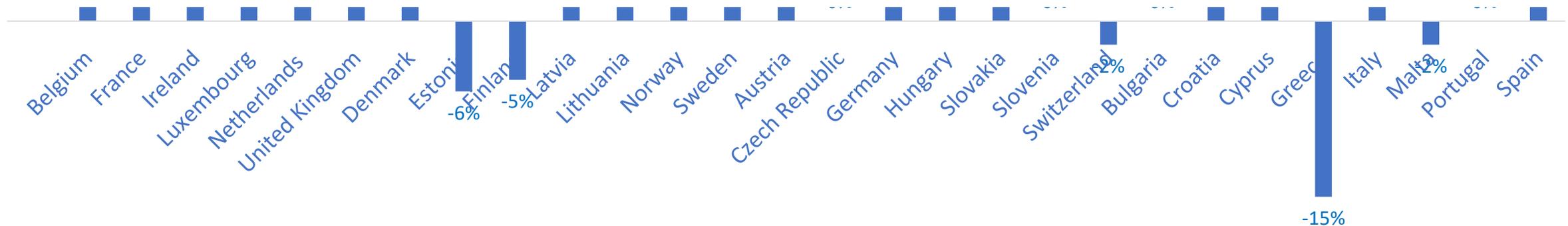
Luxembourg has the highest amount of cross-border purchases



Percentage of cross border purchases, Europe , 2016. Source: Eurostat, 2016

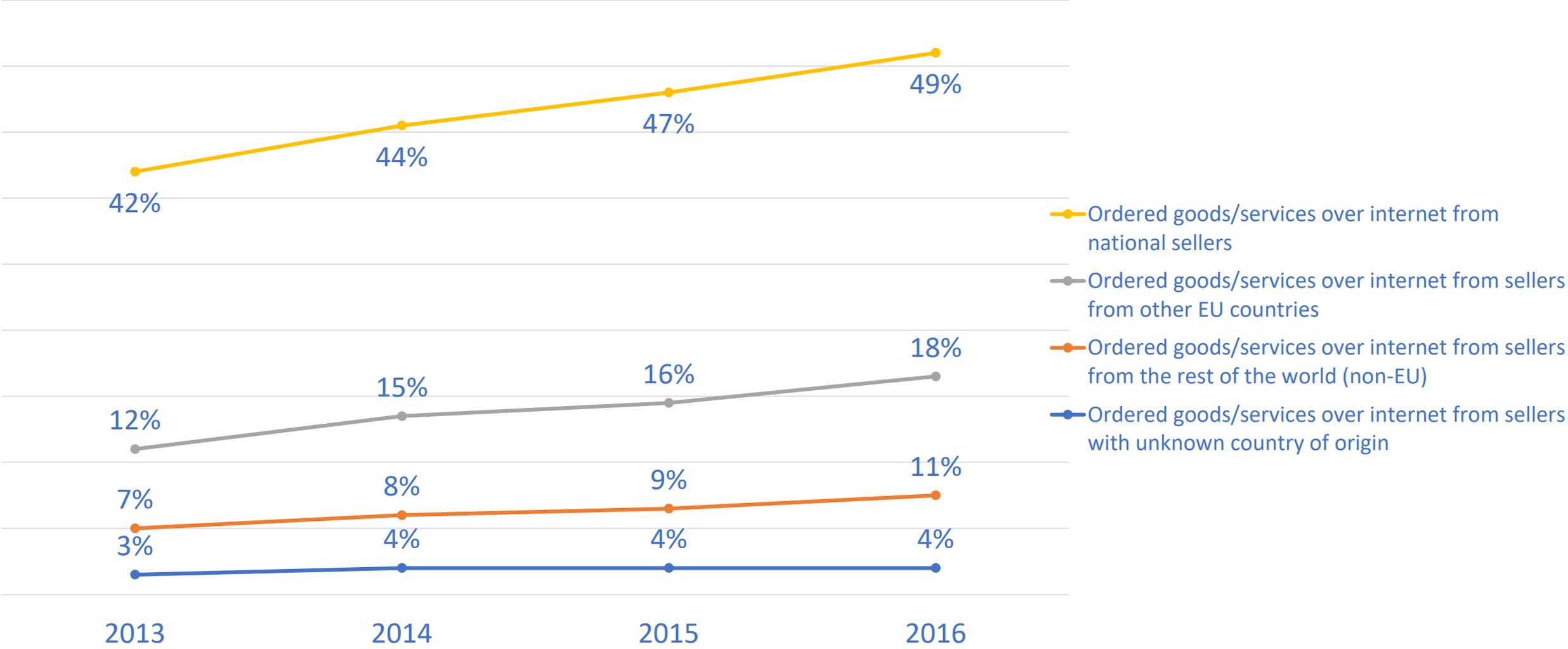
Lithuania has the highest cross-border online purchase growth

Full version available at
www.ecommercefoundation.org/reports



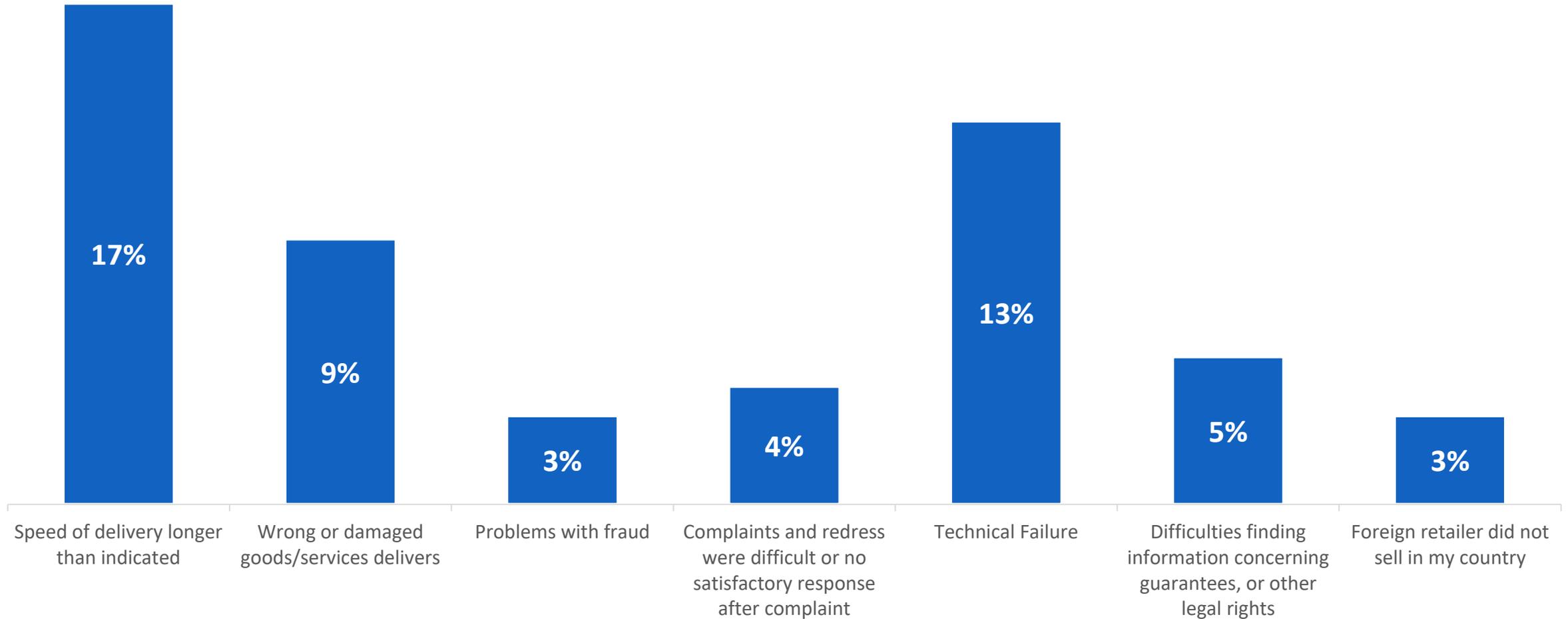
Cross-border online purchase growth in the previous 12 month, Europe, 2015-2016. Source: Eurostat, 2016

33% of all online shoppers bought abroad in 2016



Online shoppers buying cross border in the previous 12 months, Europe. Source: Eurostat, 2016

Cross-border online shopping still has its challenges



Problems with cross-border shopping, Europe. Source: Eurostat, 2016

Western Europe

Ecommerce in Belgium



Quick introduction:

- Population: 11.3 million
- Currency: Euro
- VAT: 21%
- GDP per capita: €37,104



Ecommerce facts & figures:

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Ecommerce Environment:

- 1 in 4 Belgians order products online on a monthly basis

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:



Ecommerce Recommendations:



Carine Moitier
CEO of BeCommerce

• Belgium is an open multi-language community, with Dutch, French and German regions, and Brussels as an International European hub; this is why Belgian people are top cross-border EU eShoppers.

Ecommerce in France



Quick introduction:

- Population: 64.6 million
- Currency: Euro
- VAT: 20%
- GDP per capita: €34,516



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- 28% of the ecommerce sales is now via mobile and tablet.
- 80% of 25-54 year-olds purchased online in the last 12 months

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at www.ecommercefoundation.org/reports



Marc Lolivier
Director General FEVAD

National Ecommerce Association:



Ecommerce Recommendations:

- 94% of all French web shops offer a mobile site. It is a must have.
- French love click & collect

Ecommerce in Ireland



Quick introduction:

- Population: 4.7 million
- Currency: Euro
- VAT: 23%
- GDP per capita: €59,876



Ecommerce facts & figures:

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- Full version available at
www.ecommercefoundation.org/reports



Ecommerce Environment:

- 84% of the Irish will shop online by 2021
- 16-24 year-olds purchase online most frequently

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:



Ecommerce Recommendations:

- The Irish consumer shows no preference for buying from Irish sites over International sites; 60-70% of online sales are to sites outside of Ireland.
- Mobile use on ecommerce sites has grown by over 75% in 2016.



Gerard Keohane
 StudioForty9

Ecommerce in Luxembourg



Quick introduction:

- Population: 576 thousand
- Currency: Euro
- VAT: 17%
- GDP per capita: €97,042

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports



Ecommerce facts & figures:

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Full version available at
www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:



Ecommerce Recommendations:

- A 3-language website is a must have (F, D, UK)
- Customers often use pick-up stations for delivery
- Summer holidays are from 15 July to 15 Sept.



Pierre Friob
CEO of eCom.lu

Ecommerce Environment:

- Over ¾ of Luxembourg consumers buy goods online
- 85% of 25-54 year-olds purchased online in 2016



Ecommerce in The Netherlands

Quick introduction:

- Population: 17 million
- Currency: Euro
- VAT: 21%
- GDP per capita: €41,062



Ecommerce facts & figures:

- Full version available at www.ecommercefoundation.org/reports



Ecommerce Environment:

- Google has a 99.9% search share
- 9 out of 10 Dutch use social media
- iDEAL is *the* payment method (58%).

Ecommerce Sales 2013 – 2017 (Euros. billions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)



Wijnand Jongen
CEO of Thuiswinkel.org

National Ecommerce Association:



Ecommerce Recommendations:

- iDEAL is a ‘must-offer’ payment method.
- Dutch expect next-day or same-day delivery.
- “Sinterklaas” is a Dutch holiday for which online shopping has become very popular

Full version available at
www.ecommercefoundation.org/reports

Ecommerce in The United Kingdom



Quick introduction:

- Population: 65.1 million
- Currency: Pound
- VAT: 20%
- GDP per capita: €37,309

Ecommerce Sales 2013 – 2017 (Euros. billions)

Full version available at

www.ecommercefoundation.org/reports



Ecommerce facts & figures:

- Full version available at www.ecommercefoundation.org/reports



Ecommerce Environment:

- 80% of individuals use social media regularly

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:

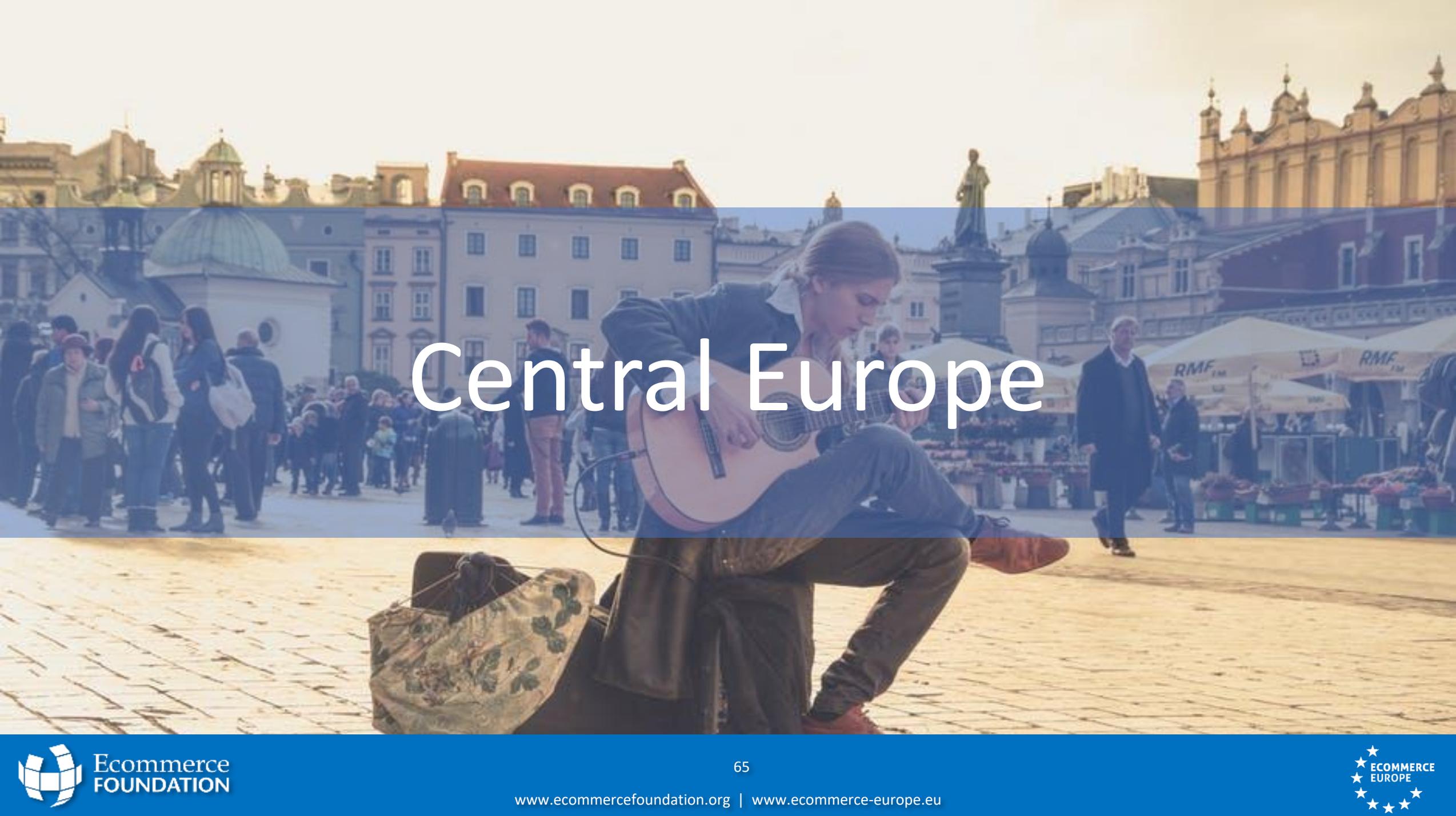


Ecommerce Recommendations:



James Roper
Chairman of IMRG

- Black Friday has become huge in the U.K.
- Over two-thirds of retail site visits are through mobile devices (smartphones and tablets)

A young woman with blonde hair, wearing a dark jacket and brown pants, is sitting on a cobblestone square in a European city. She is playing an acoustic guitar and has a bag on the ground next to her. The background shows a busy square with many people walking, historic buildings with domes and statues, and market stalls with umbrellas. The scene is captured in the warm light of late afternoon or early morning.

Central Europe

Ecommerce in Austria

Full country report available:
EcommerceFoundation.org/reports

Quick introduction:

- Population: 85.7 million
- Currency: Euro
- VAT: 20%
- GDP per capita: €41,431



Ecommerce facts & figures:

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Full version available at
www.ecommercefoundation.org/reports

Ecommerce Environment:

- Over 65% of the population has shopped online
- 81% of 16-24 year-olds bought online in the last 12 months

Ecommerce Sales 2013 – 2017 (Euros, billions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

Full version available at
www.ecommercefoundation.org/reports

National Ecommerce Association:



HANDELS
VERBAND

Ecommerce in Czech Republic



Quick introduction:

- Population: 10.5 million
- Currency: Czech Koruna
- VAT: 21%
- GDP per capita: €16,817



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- Most 25-54 year-olds spend between 100 and 500 euro on online purchases
- 3 out of 4 shoppers want same-day delivery

Ecommerce Sales 2013 – 2017 (Euros. billions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

Full version available at
www.ecommercefoundation.org/reports

National Ecommerce Association:



Ecommerce in Germany



Quick introduction:

- Population: 81 million
- Currency: Euro
- VAT: 19%
- GDP per capita: €39,709

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports



Ecommerce facts & figures:

- Full version available at www.ecommercefoundation.org/reports
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2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association: 

Ecommerce Recommendations:



Tim Arlt
CMO of Händlerbund

In Germany, free returns are expected amongst most customers; a seller is usually expected to accept returns as a gesture of goodwill

Ecommerce Environment:

- Customers are very sensitive to data protection
- Trust marks create customer confidence in a shop

Full country report available:
EcommerceFoundation.org/reports

Ecommerce in Hungary



Quick introduction:



- Population: 9.8 million
- Currency: Forint
- VAT: 27%
- GDP per capita: €10,930



Ecommerce facts & figures:

- Full version available at www.ecommercefoundation.org/reports



Ecommerce Environment:

- 37% of 16-24 year-olds bought online in the last 3 months
- Most Hungarians prefer cash-on-delivery

Ecommerce Sales 2013 – 2017 (Euros, billions)



National Ecommerce Association:



Ecommerce in Poland



Quick introduction:

- Population: 38.4 million
- Currency: Polish Zloty
- VAT: 23%
- GDP per capita: €11,423



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- 45% of 25-54 year-olds purchased online in the last 3 months

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)



Patrycja Sass-Staniszevska
Board President
E-Commerce Poland
Chamber of Digital Economy

National Ecommerce Association:



Ecommerce Recommendations:

- Over 60% of the population shop online, but still need traditional shops
- Digitalization is the most important trend across all industries

Ecommerce in Switzerland



Quick introduction:

- Population: 8.29 million
- Currency: Swiss Franc
- VAT: 8%
- GDP per capita: €72,478

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at

www.ecommercefoundation.org/reports

Ecommerce facts & figures:



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- Full version available at
- www.ecommercefoundation.org/reports
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Ecommerce Environment:

- 90% of the population is using the internet
- Swiss ecommerce brings in more revenue than physical shopping centers

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)



Carlo Terreni
General Director of Netcomm
Suisse Association

National Ecommerce Association:



Ecommerce Recommendations:

- Switzerland is a great platform for Headquarters of cross-border European merchants
- Cross-border online shoppers spend on average €2,750 per capita

Southern Europe

Ecommerce in Croatia



Quick introduction:

- Population: 4.2 million
- Currency: Croatian Kun
- VAT: 25%
- GDP per capita: €10,827



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- 47% of online buyers prefer paying with cash-on-delivery
- The biggest Croatian marketplace player is the classifieds site Njuškalo

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)



Marcel Majsan
 President of eCommerce Hrvatska

National Ecommerce Association:



Ecommerce Recommendations:

- Offer free shipping and fast delivery if you can
- Strong online appearance will increase your offline revenue

Ecommerce in Greece



Quick introduction:

- Population: 10.9 million
- Currency: Euro
- VAT: 24%
- GDP per capita: €16,446

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports



Ecommerce facts & figures:

- Full version available at
www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:



Ecommerce Recommendations:

- GRECA Trustmark is a must-have for every Greek eShop
- Cash-on-Delivery for orders less than €100 is still the most preferable method of payment (<60%)



Paris Koronaios
 General Manager of Greca

Ecommerce Environment:

- Debit/credit cards are rising as a preferable ePayment method (51%)
- 62% of online consumers use Facebook mobile app on daily basis



Ecommerce in Italy



Quick introduction:

- Population: 59.8 million
- Currency: Euro
- VAT: 22%
- GDP per capita €28,398



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- 20.9 million Italians shop online
- Travel, consumer electronics and apparel are the most relevant ecommerce categories

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:



Ecommerce Recommendations:

- Home delivery is the standard, but advanced logistics services such as pickup points and same day delivery are becoming popular
- Mobile is more and more relevant in online purchases



Roberto Liscia
 President of Consorzio Netcomm

Ecommerce in Malta



Quick introduction:

- Population: 419 Thousand
- Currency: Euro
- VAT: 18%
- GDP per capita: €22,939



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- 70% of internet users use the internet to research products/services before purchasing (in-store or online)
- 87% of internet users are active on social media

Ecommerce Sales 2013 – 2017 (Euros, millions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)



Edward Woods
 Chairman

Malta Communications Authority

National Ecommerce Association:



Ecommerce Recommendations:

- The first port of call for more than half of the Maltese digital buyers are Ecommerce marketplaces
- Paypal is the most popular electronic payment amongst Maltese digital buyers

Ecommerce in Portugal



Quick introduction:

- Population: 10.26 million
- Currency: Euro
- VAT: 23%
- GDP per capita: €18,318



Ecommerce facts & figures:

- Full version available at www.ecommercefoundation.org/reports



Ecommerce Environment:

- Most used payment methods: Multibanco Reference, Bank transfer, and credit card
- Over 46% of 16-54 year-olds purchased online in the last 12 months

Ecommerce Sales 2013 – 2017 (Euros, billions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

Full version available at www.ecommercefoundation.org/reports

National Ecommerce Association:



Alexandre Nilo Fonseca
 President of ACEPI

Ecommerce Recommendations:

- Portugal is a startup nation with an international culture and a skilled and competitive digital expertise
- Portugal has one of the best mobile infrastructure 3G/4G and optical fiber (FTTH) in Europe

Ecommerce in Spain



Quick introduction:

- Population: 46 million
- Currency: Euro
- VAT: 21%
- GDP per capita €24,920



Ecommerce facts & figures:

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Ecommerce Environment:

- Credit/Debit cards are the most common payment method
- 81% of individuals uses smartphones on a daily basis

Ecommerce Sales 2013 – 2017 (Euros. billions)

Full version available at www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:



José Luis Zimmermann
CEO of Adigital

Ecommerce Recommendations:

- The availability of delivery options is more important than price
- Create a good mobile experience, as mobile commerce is 26% of total ecommerce

Full country report available at:
EcommerceFoundation.org/reports

Ecommerce in Turkey



Quick introduction:

- Population: 79.6 million
- Currency: Turkish Lira
- VAT: 18%
- GDP per capita €8,470



Ecommerce facts & figures:

- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- Ecommerce is forecasted to grow 40-50% in 2017
- Mobile ecommerce accounted for 30% of total sales



Ecommerce Sales 2013 – 2017 (Euros, billions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

Full version available at www.ecommercefoundation.org/reports



Hakan Orhun
President of ETID

National Ecommerce Association:



Ecommerce Recommendations:

• There are approximately 1000 web stores with traffic more than 15k/month

Northern Europe

Ecommerce in Denmark



Quick introduction:

- Population: 5.7 million
- Currency: Danish Krone
- VAT: 25%
- GDP per capita €48,745



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- The average online purchase is approximately 125 euro
- Most popular payment method are debit/credit cards (81%)

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at www.ecommercefoundation.org/reports



Niels Ralund
 CEO of FDIH

National Ecommerce Association:



Ecommerce Recommendations:

- Mobile First – Tablets and smartphones account for 15% of all ecommerce purchases in 2016
- Average return rate is 3.8%

Ecommerce in Finland



Quick introduction:

- Population: 5.5 million
- Currency: Euro
- VAT: 24%
- GDP per capita €39,696



Ecommerce facts & figures:

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- Full version available at
www.ecommercefoundation.org/reports



Ecommerce Environment:

- Online banking is the most common payment method (90%)
- The average online purchase in 2016 was 80 euros

Source: yyy, 2017

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Associations:



Juhani Pekkala

Managing Director of Kaupan Liitto

Ecommerce Recommendations:

- The return rates by Finnish online shoppers are quite moderate internationally compared.
- The use of mobile devices for purchase is on the rise

Ecommerce in Norway



Quick introduction:

- Population: 5.2 million
- Currency: Norwegian Kron
- VAT: 25%
- GDP per capita €67,304



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- Most eShoppers expect a delivery time of 3 business days (25%), or 6+ days (19%)
- Debit/Credit card is the most popular payment method (65%)

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at www.ecommercefoundation.org/reports



Gerhard Anthun
 General Manager of Virke eHandel

National Ecommerce Association: **VIRKE**
Ecommerce Recommendations: eHANDEL

If you want to enter the Norwegian market, consider being certified at Trygg e-Handel – an investment that ensures your online shop complies with Norwegian legislation while increasing conversion

Ecommerce in Sweden



Quick introduction:

- Population: 9.85 million
- Currency: Swedish Krone
- VAT: 25%
- GDP per capita €48,144



Ecommerce facts & figures:

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Ecommerce Environment:

- Click-and-Collect was the most popular delivery method in 2016
- On average, less than 6% of online purchases are returned

Ecommerce Sales 2013 – 2017 (Euros, billions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)



Simon Saneback
Found Partner, Wellstreet

Ecommerce Recommendations:

- More than half of Swedish consumers shop online from their mobile devices
- Credit card and invoice are the most popular payment methods
- Majority of Swedes are used to shopping online from abroad



Eastern Europe

Ecommerce in Bulgaria



Quick introduction:

- Population: 7 million
- Currency: Bulgarian Lev
- VAT: 20%
- GDP per capita €6,509

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Ecommerce facts & figures:



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- Full version available at
www.ecommercefoundation.org/reports
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Ecommerce Environment:



- More than 60% of online traffic is mobile
- Cash-on-delivery is preferred method of payment, online payments are growing

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)

National Ecommerce Association:



Janet Naidenova
 Board Chairperson
 Bulgarian Ecommerce

Ecommerce Recommendations:

- Quality content, quick, easy and mobile first
- Free same-day or next-day delivery preferred
- Personalized customer experience is biggest advantage

Ecommerce in Estonia



Quick introduction:

- Population: 1.3 million
- Currency: Euro
- VAT: 20%
- GDP per capita €16,456



Ecommerce facts & figures:

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- Full version available at
- www.ecommercefoundation.org/reports
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Ecommerce Environment:

- Bank link is the most widely used online payment method in Estonia (90%)
- 95% of eShoppers prefer parcel terminals to easily pickup their online purchases

Ecommerce Sales 2013 – 2017 (Euros, millions)



Signe Kõiv
 Chairman of the Board
 Estonian eCommerce Association

National Ecommerce Association:

Eesti e-kaubanduse liit

Ecommerce Recommendations:

- There are approximately 5,000 eShops in Estonia
- Retail via internet is forecasted to grow 40% in 2017
- We celebrate the eShopping day, "E-Monday" twice a year in May and November

Ecommerce in Romania



Quick introduction:

- Population: 19.3 million
- Currency: Romanian Leu
- VAT: 19%
- GDP per capita €8,825



Ecommerce facts & figures:

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- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- 18% of people shopped online using a mobile device
- On average, consumers made 8.4 purchases online in 2016

Ecommerce Sales 2013 – 2017 (Euros, billions)

2009 2010 2011 2012 2013 2014 2015 2016 2017(f)



Florinel Ioan Chis
 Director ARMO

National Ecommerce Association:



Ecommerce Recommendations:

- Black Friday in November is the main shopping event
- Cash on delivery is the preferred payment method (88%)

Full country report available:
EcommerceFoundation.org/reports

Ecommerce in Russia



Quick introduction:

- Population: 143 million
- Currency: Russian Ruble
- VAT: 18%
- GDP per capita €8,102



Ecommerce facts & figures:

- Full version available at www.ecommercefoundation.org/reports
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Ecommerce Environment:

- In 2016, 64% of Russian eShoppers made at least 1 unplanned purchase
- 1 in 3 consumers makes purchases via smartphone

Ecommerce Sales 2012 - 2017 (Europe, billions)

Full version available at www.ecommercefoundation.org/reports



National Ecommerce Association:



Full country report available:
EcommerceFoundation.org/reports

Ecommerce in Ukraine



Quick introduction:

- Population: 44.6 million
- Currency: Ukrainian Hryvnia
- VAT: 20%
- GDP per capita €1,791

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports



Ecommerce facts & figures:

- Full version available at
www.ecommercefoundation.org/reports



Ecommerce Environment:

- 9 in 10 internet users have shopped online at least once
- Cash-on-Delivery is the preferred payment method

National Ecommerce Association:



About the Report

Where to find our National Ecommerce Reports

The **National Ecommerce Reports** are published by the **Ecommerce Foundation**. They provide overviews of the mature and emerging markets in the field of ecommerce.

In total, the Ecommerce Foundation publishes multiple country reports and **two overview reports** per year, covering the most important ecommerce markets worldwide.

To have a **tailor-made ecommerce report** made, completely based on your wishes and requirements, please contact us via **info@ecommercefoundation.org**.

A light and full reports can be downloaded from:
<http://www.ecommercefoundation.org/reports>.

Overview reports

- European overview report June 26
- Global overview report September

Country reports

- The Netherlands April
- Belgium June
- United Kingdom June
- Ireland June
- Germany June
- France June
- Russia June
- Czech Republic June
- Hungary June
- Poland July
- Austria July
- Greece July
- Italy July
- Portugal July

Definitions related to the Internet & Ecommerce

- **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 ecommerce:** percentage of ecommerce 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.
- **ecommerce (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.
- **ecommerce 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 ecommerce (GOMSEC):** aims to provide guidelines to measure and monitor B2C ecommerce in order to enable all European countries to provide data with respect to the penetration of B2C ecommerce 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 & Ecommerce

- **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.

Global Online Measurement Standard for Ecommerce (GOMSEC)

GOMSEC aims to provide **guidelines for measuring and monitoring B2C ecommerce**. As a result, **all countries worldwide** are able to provide data with respect to the penetration of B2C ecommerce in a standardized way. All Ecommerce Foundation figures and estimates are based on GOMSEC, unless stated otherwise.

The GOMSEC reports on sales figures for the total B2C ecommerce 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 to 31 December of each report year**. Growth rates are calculated and measured by the B2C ecommerce sales in the national currency.

Definition of B2C ecommerce 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 ecommerce

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 ecommerce 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 ecommerce includes Value Added Tax (VAT) or other sales tax, delivery costs and apps, but excludes returns.

Global Online Measurement Standard for Ecommerce (GOMSEC)

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

Clothing

Underwear & Upperwear
 Children's wear
 Swimwear & Sportswear
 Nightwear & legwear

Shoes & Personal lifestyle

Shoes
 Jewelry, Bijoux, Watches & others
 fashion accessories (e.g. sunglasses)
 Bags, wallets, suitcases

Toys

Indoor and outdoor toys

Electronics

Consumer Electronics

Photo equipment
 Audio equipment
 TV/video equipment
 Car electronics
 (navigation, audio,
 etc.)

Information Technology (IT)

IT hardware (PCs, laptops,
 tablets, etc.)
 Computer Software
 Music instruments
 USB sticks, DVD/CD-
 recordable, ink cartridges,
 computer accessories

Household Electronics

MDA:
 air-conditioning,
 dishwashers, wash
 machines and other
 white goods
 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 Ecommerce (GOMSEC)

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 Ecommerce (GOMSEC)

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/ Scooter insurance	Annuity insurance	Disability 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	

Sources used in this report

The report could only be realized by consulting a great number of valuable sources. These were 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 and sometimes different figures and data were given by varying sources within the same country, for example due to different definitions. In our reports we have mentioned the different sources, definitions and outcomes of such reports, studies and interpretations.

The report is based on information that we consider reliable, but we cannot vouch for it being completely accurate or complete, nor should it be relied upon as such. Opinions expressed are our current opinions as of the date of this report.

Publications

- Statistics Netherlands
- CIA Worldfactbook
- Doingbusiness
- ecommerce Payment Monitor
- European Commission
- Eurostat
- Fung Global Retail & Tech
- IAB
- IMF
- Quandl
- Statcounter
- Statista
- Tradingeconomics
- Thuiswinkel.org Market Monitor
- Twinkle top 100
- United Nations
- Worldbank
- Wikipedia

Corporate sources

- GfK
- Thuiswinkel.org

About the Ecommerce Foundation



The Ecommerce Foundation is an independent non-profit organization, initiated by worldwide national ecommerce associations and online and omnichannel selling companies from industries such as retail, travel & finance.

Why an Ecommerce Foundation?

Our mission is to **foster global digital trade** as peace is the natural effect of trade. By facilitating digital commerce we hope to make the world a slightly better place.

How does the Foundation help?

We facilitate the development of **practical knowledge**, insights **and services** for which individual institutions, retail and ecommerce 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 projects which could not have been realized on an individual basis.

What does the Ecommerce Foundation do?

The Foundation is developing and offering **several services** such as the Ecommerce Benchmark, the EcommerceWiki and the National Ecommerce Reports. At the moment we are also researching if a Global Ecommerce Trustmark can be set-up to increase worldwide consumer trust and as a result global trade.

The Services of the Ecommerce Foundation



40+ National Ecommerce Reports supporting retailers going across borders



Every year a **C-level study delegation** travels to an inspiring location. Previous trips include Silicon Valley, Seattle, NY and China



The **Global Ecommerce Summit & awards** offer retailers insights into best practices from across the world



The **Ecommerce Benchmark** allows online retailers to compare & improve their ecommerce activities



The **EcommerceWiki** is the online handbook for ecommerce managers with templates, process descriptions, and more



EcommerceReports curates all ecommerce related research across the globe by adding an editorial board and peer review



Lectures & presentations are offered to help members look into the future of shopping



Custom research is done for a diverse set of topics both co-branded as well white labeled



Safe.Shop certifies local trust marks to issue the global ecommerce trust to promote and foster global digital trade.

About the Authors



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Jorij Abraham has been active in the international ecommerce community since 1997. He was an Ecommerce Manager at Bijenkorf, TUI and Sanoma Media and Director of Consulting at Unic.

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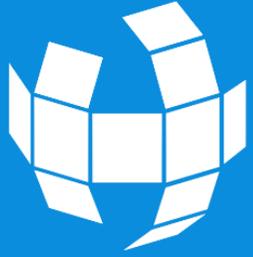
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