First of all, I would like to thank Ecommerce Operations for having prepared this report and all the sponsors for their support. Ecommerce Europe is the voice of the European digital commerce sector. Through its 19 national e-commerce associations, we represent more than 75,000 companies selling goods and services online to consumers in Europe. Our mission is to act at EU level to help legislators create a better framework for online merchants, so that their sales can grow further. With a European B2C ecommerce turnover forecasted to grow at around 13% and to hit 621 billion euros in 2019, we are, of course, very pleased to see that the e-commerce sector in Europe is still growing at a fast pace. This is indeed a great signal for our industry. However, despite the progress stemming from the good collaboration between EU policymakers and the industry to build a harmonized Digital Single Market, European businesses still face barriers to growth, especially beyond their national borders. One of the biggest challenges for online merchants remains the lack of level playing field both in the EU and globally, as players based outside Europe have the ability to put major pressure on the European market. In this regard, European businesses need all the support they can get from policymakers and regulators in order to be able to grow in an increasingly competitive global market. We believe that the e-commerce sector is at a turning point. If the European Union wants its companies to fully play their role in a globalized world, increasingly defined by the fierce competition from non-EU companies, it needs to create a harmonized market and a favorable environment where European e-commerce companies can flourish. The recent European elections represent the best occasion for EU policymakers to seize the opportunity of the new upcoming mandate in the European Institutions to build a strong political vision for the ecommerce sector. To unlock the growth potential of the e-commerce sector and build on the strong basis illustrated in this report, there are key policy objectives to be fulfilled in the coming years. Firstly, it is crucial to enforce current regulations before creating new rules. Secondly, it is also imperative to harmonize essential laws and standards so that European businesses can rely on single sets of rules when operating cross-border. Thirdly, it is essential that rules created at European level are also enforceable vis-à-vis non-EU companies operating in the EU. Finally, we need more investments in new technologies and in digital education, so that e-commerce businesses are empowered to shape Europe's digital future. Only this way, we can succeed in creating a harmonized and competitive Digital Single Market where ecommerce will continue its double-digit growth and where businesses will be able to compete on a global scale.
About Ecommerce Europe

Ecommerce Europe is the voice of the European digital commerce sector. Through its 19 national e-commerce associations, Ecommerce Europe represents more than 75,000 companies selling goods and services online to consumers in Europe. European merchants still face difficulties when selling online, specifically cross-border. That is why we act at European level to help legislators create a better framework for online merchants, so that their sales can grow further. We aspire to be the European platform for digital commerce, where the members of national e-commerce associations, direct company members and suppliers can:

• Network and share best practices, exchange information and knowledge on issues concerning their business;
• Work towards promotion, professionalization and self-regulation the digital commerce industry, thanks to projects like our European Trustmark;
• Create better fitted frameworks that can foster online sales at all levels, both domestically and cross-border.

Ecommerce Europe’s Public Affairs Activities

Ecommerce Europe represents the interests of online merchants vis-à-vis European legislators. Our advocacy activities focus on four main pillars:

• e-Regulations
• Digital Transactions and Innovation
• e-Logistics
• Trust (Ecommerce Trustmark)

These pillars are translated into four Working Committees that are managed by the Brussels Secretariat. Members of Ecommerce Europe can join the committee meetings to discuss and further develop the positions of the European e-commerce association on a wide range of topics. These meetings are also the occasion to get informed, share best practices and discuss obstacles merchants face in their daily e-commerce operations in several countries. Ecommerce Europe translates the outcome of the Working Committees into policy recommendations for legislators on how to make it easier for merchants to sell online, especially cross-border. At the same time, we translate what comes from the European Union into practical information that can be used by online merchants in their daily activities.

How to get involved

Ecommerce Europe welcomes national e-commerce associations and companies selling goods and/ or services online to consumers as members. Furthermore, we welcome preferred suppliers to the European e-commerce industry and other related organizations (i.e. NGOs, other associations, with a strong affiliation to e-commerce). Members and partners of Ecommerce Europe can benefit from a wide range of services. For instance, they get access to important information about changes impacting their businesses, they can benefit of practical tools (i.e. factsheets, Q&As) to help them comply with new rules, they can influence how EU legislation is drafted, they can share and exchange knowledge with other stakeholders, network with peers and boost their visibility at the events and workshops organized by Ecommerce Europe. If you would like to be involved with Ecommerce Europe or one of our national associations, please visit our website www.ecommerce-europe.eu or send us an e-mail at info@ecommerce-europe.eu.

WEBSITE:
www.ecommerce-europe.eu

FOLLOW US:
@Ecommerce_EU

www.linkedin.com/company/ecommerce-europe/

Address: Rue d’Arlon 69-71, 1040 Brussels (Belgium)
Tel: +32 (0) 2 502 31 34
Email: info@ecommerce-europe.eu
Ecommerce Associations & European Report Sources

Western Europe:
- Netherlands
- Ireland
- Belgium
- France
- Germany
- United Kingdom
- Luxembourg

Northern Europe:
- Denmark
- Finland
- Iceland
- Norway
- Sweden

Central Europe:
- Austria
- Czech Republic
- Hungary
- Poland
- Switzerland
Ecommerce Associations & European Report Sources

Eastern Europe:
- Bulgaria
- Russia
- Ukraine
- Romania

Southern Europe:
- Cyprus
- Greece
- Italy
- Malta
- Portugal
- Spain
As the principal organization representing retail and wholesale in Europe, EuroCommerce decided to support the European Ecommerce Report again in 2019. E-commerce is growing fast everywhere, and is becoming more and more important as part of business models and for consumers in their everyday lives. The fast-growing role of online sales is both driving and responding to changes in consumer purchasing behavior. Europe needs to be able to keep up with the massive progress being made in other regions of the world. To understand the developments in the different European markets is therefore crucial, and this report contributes to this knowledge.

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, while ensuring that consumers are comfortable to embrace the possibilities that e-commerce brings. Meanwhile, we will continue to press for a regulatory framework which creates the right conditions for growth in all channels of sales, and helps European retail to innovate and compete globally.
EuroCommerce: the European federation for retail & wholesale

About EuroCommerce

EuroCommerce is the principal European organisation representing the retail and wholesale sector. It embraces national associations in 31 countries and 5.4 million companies, both leading global players such as Carrefour, Ikea, Metro and Tesco, and many small businesses. Retail and wholesale provide a link between producers and 500 million European consumers over a billion times a day. It generates 1 in 7 jobs, providing a varied career for 29 million Europeans, many of them young people. It also supports millions of further jobs throughout the supply chain, from small local suppliers to international businesses. EuroCommerce is the recognised European social partner for the retail and wholesale sector.
Thank you for reading this report

Thank you for downloading this report. We hope it will help you take the next step in selling online in Europe.

Ecommerce Operations is an independent organization, initiated by worldwide national ecommerce associations as well as online and omnichannel selling companies from industries such as retail, travel & finance. 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 would also like to give a special thank you to all the National Ecommerce Associations of Europe for providing data for this report. It helped us make this the most comprehensive analysis of the European ecommerce market we have ever conducted. Additionally, we would like to thank our esteemed report partners: Ecommerce Europe, EuroCommerce, SAP, Asendia, MultiSafepay, .shop and Manhattan Associates. A great amount of gratitude is extended to Ecommerce Europe and EuroCommerce, for their continued support.

If you would like to read more of our reports, you can them at www.ecommercefoundation.org/reports.
Valued Report Partners

SAP Customer Experience is a business unit of SAP, providing omnichannel customer engagement and commerce solutions that allow 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. Through its state-of-the-art customer data management, context driven marketing tools and unified commerce processes, SAP Customer Experience has helped some of the world’s leading organizations to attract, retain and grow a profitable customer base.

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

We combine the experience and expertise of our founding companies, La Poste and Swiss Post. As a joint venture, we bring together a wealth of international and local expertise and connections. Today we employ over 1,000 people in fifteen country offices in Europe, Asia and the USA - a global network blended with a local presence.

Since the beginning of the ecommerce revolution in 1999, MultiSafepay has always strived to be on the frontline of innovation and offers a comprehensive mix of payment methods and features that enable merchants to operate both locally and across Europe.

Trusted by over 15,000 European online shops already integrated, MultiSafepay is experienced in providing the best conversion-enhancing features and advanced reporting tools that empower merchants to save time and increase their revenue.
Valued Report Partners

.shop

.shop is a domain name for ecommerce. Short, meaningful and relevant, .shop allows ecommerce businesses to choose a brandable online address that instantly identifies ecommerce websites to online shoppers around the world. A .shop domain name can also help offline retailers and service providers to be discoverable online. For businesses, .shop domain names are a more powerful marketing tool and can be used to distinguish their corporate website from their online shop, and provide an enhanced user experience for their customers.

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-premise 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.
Table of Contents

#1 EUROPE OVERVIEW
#2 INFRASTRUCTURE & LOGISTICS
#3 ECOMMERCE LANDSCAPE
#4 EXPERT OPINIONS AND ADVICE
#5 CASE STUDY: MARKETPLACES IN EUROPE
#6 ABOUT THE REPORT
Western Europe:
- Netherlands
- Belgium
- United Kingdom
- Ireland
- France
- Luxembourg
- Germany

Northern Europe:
- Denmark
- Estonia
- Finland
- Iceland
- Latvia
- Lithuania
- Norway
- Sweden

Central Europe:
- Austria
- Czech Republic
- Hungary
- Poland
- Switzerland

Eastern Europe:
- Bulgaria
- Russia
- Ukraine
- Romania
- North Macedonia
- Serbia

Southern Europe:
- Croatia
- Cyprus
- Greece
- Italy
- Malta
- Portugal
- Turkey
- Spain

*Countries labeled green are not included in this report.*
Europe's population continues to increase

Europe Population
2013-2019 (f), millions

- 2013: 784.9
- 2014: 787.4
- 2015: 791.7
- 2016: 793.3
- 2017: 794.75
- 2018: 797.14
- 2019(f): 798.4
Western Europe has the largest population

<table>
<thead>
<tr>
<th>REGION</th>
<th>2019 Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Europe</td>
<td>248,832,458</td>
</tr>
<tr>
<td>Northern Europe</td>
<td>33,197,099</td>
</tr>
<tr>
<td>Central Europe</td>
<td>75,693,748</td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>225,075,414</td>
</tr>
<tr>
<td>Southern Europe</td>
<td>215,596,315</td>
</tr>
</tbody>
</table>

**Share of Population, by Region 2019**

- Western Europe: 27% (248,832,458)
- Northern Europe: 31.16% (33,197,099)
- Central Europe: 28.19% (75,693,748)
- Eastern Europe: 9.48% (225,075,414)
- Southern Europe: 4.15% (215,596,315)
The 65+ age group is the 2nd largest in Europe.

Europe Age Structure 2018

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-14</td>
<td>16.76%</td>
</tr>
<tr>
<td>15-24</td>
<td>11.01%</td>
</tr>
<tr>
<td>25-54</td>
<td>42.23%</td>
</tr>
<tr>
<td>55-64</td>
<td>12.92%</td>
</tr>
<tr>
<td>65+</td>
<td>17.08%</td>
</tr>
</tbody>
</table>

Age Distribution of Online Shoppers 2018, U.S. Online Shoppers

The pie chart on the right is a breakdown of US online shoppers, however it is similar to the EU, in that online shoppers are typically between the ages of 18-55. This serves as a comparison because both markets are quite mature.

- Verto Analytics, Connie Hwong / February 28, 2018
Northern and Western Europe have the oldest population.
Infrastructure & Logistics
Europe's GDP to reach almost 20 trillion in 2019

GDP, Europe
2013-2019 (f), (Euro, trillion)

<table>
<thead>
<tr>
<th>Region</th>
<th>GDP per capita 2018</th>
<th>GDP per capita 2019 (f)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Europe</td>
<td>38,312€</td>
<td>39,893€</td>
</tr>
<tr>
<td>Northern Europe</td>
<td>44,121€</td>
<td>45,637€</td>
</tr>
<tr>
<td>Central Europe</td>
<td>23,254€</td>
<td>24,358€</td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>7,822€</td>
<td>8,055€</td>
</tr>
<tr>
<td>Southern Europe</td>
<td>18,968€</td>
<td>19,028€</td>
</tr>
</tbody>
</table>
Scandinavian countries continue to rank high in important ecommerce indices

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Denmark</td>
</tr>
<tr>
<td>7</td>
<td>Norway</td>
</tr>
<tr>
<td>9</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>11</td>
<td>North Macedonia</td>
</tr>
<tr>
<td>12</td>
<td>Sweden</td>
</tr>
<tr>
<td>14</td>
<td>Lithuania</td>
</tr>
<tr>
<td>16</td>
<td>Estonia</td>
</tr>
<tr>
<td>17</td>
<td>Finland</td>
</tr>
<tr>
<td>19</td>
<td>Latvia</td>
</tr>
<tr>
<td>21</td>
<td>Iceland</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Germany</td>
</tr>
<tr>
<td>2</td>
<td>Sweden</td>
</tr>
<tr>
<td>3</td>
<td>Belgium</td>
</tr>
<tr>
<td>4</td>
<td>Austria</td>
</tr>
<tr>
<td>6</td>
<td>Netherlands</td>
</tr>
<tr>
<td>8</td>
<td>Denmark</td>
</tr>
<tr>
<td>9</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>10</td>
<td>Finland</td>
</tr>
<tr>
<td>11</td>
<td>Switzerland</td>
</tr>
<tr>
<td>16</td>
<td>France</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>6</td>
<td>Finland</td>
</tr>
<tr>
<td>8</td>
<td>Sweden</td>
</tr>
<tr>
<td>9</td>
<td>France</td>
</tr>
<tr>
<td>12</td>
<td>Germany</td>
</tr>
<tr>
<td>13</td>
<td>Netherlands</td>
</tr>
<tr>
<td>14</td>
<td>Norway</td>
</tr>
<tr>
<td>16</td>
<td>Austria</td>
</tr>
<tr>
<td>17</td>
<td>Spain</td>
</tr>
<tr>
<td>18</td>
<td>Luxembourg</td>
</tr>
</tbody>
</table>
#3 Ecommerce Landscape
Northern Europe has the highest internet penetration.

**Total Annual Internet Penetration 2015-2019 (f)**

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019(f)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>75.77%</td>
<td>77.89%</td>
<td>79.24%</td>
<td>81.05%</td>
<td>82.49%</td>
</tr>
</tbody>
</table>

**Internet Penetration per region 2018**

- Northern: 93.3%
- Western: 92.3%
- Central: 81.3%
- Southern: 76.7%
- Eastern: 71.0%
In 2018, Iceland had the highest internet penetration, while Ukraine had the lowest.
Online shopping ranges from 88% to 22%
European B2C ecommerce turnover forecasted to hit 621 billion euros in 2019
B2C ecommerce turnover continues to grow at around 13%
Most B2C ecommerce turnover is concentrated in Western Europe (66%)

<table>
<thead>
<tr>
<th>European Regions' B2C Ecommerce Turnover 2018 (Euro, billion)</th>
<th>European Regions' Share of Total B2C Ecommerce Turnover 2018 (Euro, billion)</th>
</tr>
</thead>
</table>

This is the light version of the report-you can purchase the full version at www.ecommercefoundation.org/shop
Northern Europe has the highest spending per e-shopper

Average e-shopper spending, Europe
2015-2019 (€)

Average e-shopper spending, per region
2018

This is the light version of the report - you can purchase the full version at www.ecommercefoundation.org/shop
Maltese are most likely to order from other EU sellers

Cross-Border Purchases, by Country
2018

Online purchases from sellers from other EU countries

Online purchases from sellers from the rest of the world (non-EU)
Portuguese e-shoppers are most worried about payment security concerns

Reasons for not shopping online: Share of individuals in each country 2017

- Too long delivery times or because of problems receiving goods at home
- Payment security concerns
- Trust concerns about receiving/returning goods, complaint/redress concerns
Kosovo and Montenegro are more likely to refrain from ordering online vs. in-store

Reason for not ordering online: Share of individuals who prefer to shop in person, like to see the product, loyalty to shops or force of habit

2017
Western Europe
Western Europe

B2C Ecommerce Turnover & Growth Rate
2013-2019 (f) (Euro, billions)

Ecommerce Environment
2018

- Internet penetration: 93%
- % of e-shoppers: 81.4%
- Average Spending: €1,968
- Average Spending Growth: 10.50%

<table>
<thead>
<tr>
<th>E-GDP (share of GDP made up by ecommerce sales)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
</tr>
<tr>
<td>2014</td>
</tr>
<tr>
<td>2015</td>
</tr>
<tr>
<td>2016</td>
</tr>
<tr>
<td>2017</td>
</tr>
<tr>
<td>2018</td>
</tr>
<tr>
<td>2019 (f)</td>
</tr>
</tbody>
</table>
The Netherlands

Quick introduction 2019
- Population: 17 million
- Currency: Euro
- Logistics Performance: 6th
- Ease of Doing Business: 36th
- E-Government Index: 13th
- Inclusive Internet: 29th
- GDP Per Capita: 44,550 €

Ecommerce Environment 2018

Payment Method Preference/Behavior
- iDEAL: 88%
- Credit card: 22%
- Gift card: 18%
- PayPal: 16%
- Afterpay: 15%
- Bank transfer: 9%

Delivery Method Preference/Behavior
- At home during day: 46%
- At home during evening: 24%
- Delivered to mailbox: 15%
- Distribution point collection: 9%
- At work: 2%
- Physical store: 1%

Best Selling Ecommerce Retailers
- Bol.com: €1,220
- Coolblue: €884
- Zalando: €670
- Wehkamp: €570
- Albert Heijn: €480
- Amazon: €230
- H&M: €220

Ecommerce facts & figures 2019
- Internet penetration: 96%
- % of e-shoppers: 85%
- E-GDP: 3.28%
- Turnover Growth: 5.30%

B2C Ecommerce Turnover 2013-2019 (f) (Euro, billions)

This is the light version of the report- you can purchase the full version at www.ecommercefoundation.org/shop
Belgium

Quick introduction 2019

- Population: 11.5 million
- Currency: Euro
- Logistics Performance: 3rd
- Ease of Doing Business: 45th
- E-Government Index: 27th
- Inclusive Internet: 25th
- GDP Per Capita: 37,900 €

Ecommerce Environment 2018

Internet penetration: 90%
% of e-shoppers: 68%
E-GDP: 3.05%
Turnover Growth: 13%

Ecommerce facts & figures 2019

B2C Ecommerce Turnover 2013-2019 (€) (Euro, billions)

Payment Method Preference/Use

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bancontact (online)</td>
<td>50%</td>
</tr>
<tr>
<td>Credit card</td>
<td>46%</td>
</tr>
<tr>
<td>PayPal</td>
<td>28%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>15%</td>
</tr>
<tr>
<td>Bancontact (at delivery/pickup)</td>
<td>10%</td>
</tr>
<tr>
<td>Gift cards/loyalty points</td>
<td>10%</td>
</tr>
<tr>
<td>Cash (at delivery/pickup)</td>
<td>4%</td>
</tr>
</tbody>
</table>

Delivery Method Preference/Behavior

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Preference/Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home delivery</td>
<td>64%</td>
</tr>
<tr>
<td>Pick-up at pick-up point</td>
<td>9%</td>
</tr>
<tr>
<td>Pick-up at the shop</td>
<td>8%</td>
</tr>
<tr>
<td>Delivery at work</td>
<td>2%</td>
</tr>
<tr>
<td>Pick-up in locker</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
</tbody>
</table>

Best Selling Ecommerce Retailers (Mill.)

<table>
<thead>
<tr>
<th>Best Selling Ecommerce Retailers</th>
<th>(Mill.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bol.com</td>
<td>€386</td>
</tr>
<tr>
<td>Coolblue</td>
<td>€322</td>
</tr>
<tr>
<td>Amazon.fr</td>
<td>€153</td>
</tr>
<tr>
<td>Zalando.be</td>
<td>€132</td>
</tr>
<tr>
<td>Apple.com</td>
<td>€101</td>
</tr>
<tr>
<td>Amazon.com</td>
<td>€81</td>
</tr>
<tr>
<td>Vandenborre.be</td>
<td>€62</td>
</tr>
</tbody>
</table>

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop
United Kingdom

Quick introduction 2019
- Population: 66.8 million
- Currency: Pound
- Logistics Performance: 9th
- Ease of Doing Business: 9th
- E-Government Index: 4th
- Inclusive Internet: 5th
- GDP Per Capita: 37,700 €

Ecommerce Environment 2018 & 2019
- Population: 66.8 million
- Currency: Pound
- Logistics Performance: 9th
- Ease of Doing Business: 9th
- E-Government Index: 4th
- Inclusive Internet: 5th
- GDP Per Capita: 37,700 €

Ecommerce facts & figures 2019
- Internet penetration: 96%
- % of e-shoppers: 87%
- E-GDP: 7.94%
- Turnover Growth: 14.6%

B2C Ecommerce Turnover 2013-2019 (f) (Euro, billions)

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debit or credit card</td>
<td>52%</td>
</tr>
<tr>
<td>PayPal/similar</td>
<td>43%</td>
</tr>
<tr>
<td>Direct bank payment</td>
<td>1%</td>
</tr>
<tr>
<td>Cash on delivery</td>
<td>1%</td>
</tr>
<tr>
<td>Invoice</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Preference/Behavior</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home delivery, daytime</td>
<td>61%</td>
</tr>
<tr>
<td>Delivered to mailbox</td>
<td>13%</td>
</tr>
<tr>
<td>Home deliver, evening</td>
<td>14%</td>
</tr>
<tr>
<td>Collect from physical store</td>
<td>2%</td>
</tr>
<tr>
<td>Collect from distribution point</td>
<td>4%</td>
</tr>
<tr>
<td>Delivery to workplace</td>
<td>5%</td>
</tr>
</tbody>
</table>

Leading Multichannel Retailers
- New Look
- Schuh
- Argos
- Oasis
- Wickes
- BBQ
- Evans Cycle

This is the light version of the report- you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction 2019

- Population: 4.8 million
- Currency: Euro
- Logistics Performance: 29th
- Ease of Doing Business: 23rd
- E-Government Index: 22nd
- Inclusive Internet: 21st
- GDP Per Capita: 62,500 €

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit card</td>
<td>79%</td>
</tr>
<tr>
<td>Mobiles</td>
<td>11%</td>
</tr>
<tr>
<td>E-wallets</td>
<td>6%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>2%</td>
</tr>
<tr>
<td>Prepaid cards</td>
<td>2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Preference/Behavior</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>79%</td>
</tr>
<tr>
<td>At work</td>
<td>20%</td>
</tr>
<tr>
<td>To a parcel shop</td>
<td>17%</td>
</tr>
<tr>
<td>To a post office/station</td>
<td>12%</td>
</tr>
<tr>
<td>To a parcel locker station</td>
<td>11%</td>
</tr>
<tr>
<td>To the retailer's store</td>
<td>7%</td>
</tr>
</tbody>
</table>

Ecommerce facts & figures 2019

- Internet penetration: 84%
- % of e-shoppers: 71%
- E-GDP: 2.53%
- Turnover Growth: 7%

B2C Ecommerce Turnover 2013-2019 (f) (Euro, billions)

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019

- Population: 65.4 million
- Currency: Euro
- Logistics Performance: 16th
- Ease of Doing Business: 32nd
- E-Government Index: 9th
- Internet Inclusivity: 10th
- GDP Per Capita: 36,900 €

Ecommerce facts & figures
2019

- Internet penetration: 90%
- % of e-shoppers: 76%
- E-GDP: 4.31%
- Turnover Growth: 12.5%

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Payment Method (firms' report of usage)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank card</td>
<td>80%</td>
</tr>
<tr>
<td>Online banking</td>
<td>11%</td>
</tr>
<tr>
<td>Consumer credit</td>
<td>4%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Preference/Behavior</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery at home</td>
<td>86%</td>
</tr>
<tr>
<td>Delivery in relay points</td>
<td>83%</td>
</tr>
<tr>
<td>Collect at store</td>
<td>36%</td>
</tr>
<tr>
<td>E-reservation (pickup and pay at store)</td>
<td>24%</td>
</tr>
<tr>
<td>At work</td>
<td>13%</td>
</tr>
<tr>
<td>Send parcel to locker station</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Selling Ecommerce Retailers</th>
<th>(Mill.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon.fr</td>
<td>€2,185</td>
</tr>
<tr>
<td>Cdiscount.com</td>
<td>€2,075</td>
</tr>
<tr>
<td>Vente-privee.com</td>
<td>€1,885</td>
</tr>
<tr>
<td>Auchan.fr</td>
<td>€1,318</td>
</tr>
<tr>
<td>Apple.com</td>
<td>€820</td>
</tr>
<tr>
<td>Fnac.com</td>
<td>€675</td>
</tr>
<tr>
<td>showroomprive.com</td>
<td>€588</td>
</tr>
</tbody>
</table>

This is the light version of the report-you can purchase the full version at www.ecommercefoundation.org/shop
Luxembourg

Quick introduction
2019

- Population: 596 thousand
- Currency: Euro
- Logistics Performance: 24th
- Ease of Doing Business: 66th
- E-Government Index: 18th
- GDP Per Capita: 104,700 €

Ecommerce Environment
2017

Ecommerce facts & figures
2019

- Internet penetration: 97%
- % of e-shoppers: 83%
- E-GDP: 1.39%
- Turnover Growth: 9%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, millions)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Online banking</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit cards</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digicash</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debit card</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This is the light version of the report, you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction 2019

- Population: 82.4 million
- Currency: Euro
- Logistics Performance: 1st
- Ease of Doing Business: 24th
- E-Government Index: 12th
- Internet Inclusivity: 18th
- GDP Per Capita: 41,400 €

Ecommerce facts & figures 2019

- Internet penetration: 93%
- % of e-shoppers: 83%
- E-GDP: 1.71%
- Turnover Growth: 9.14%

Ecommerce Environment 2018

Payment Method Preference/Use
- PayPal: 52%
- Invoice: 26%
- Debit or credit card: 12%
- Direct debit: 6%
- Cash on delivery: 1%
- Other/don't know: 2%

Delivery Method Preference/Behavior
- Deutsche Post DHL: 77%
- Collection: 21%
- Spedition: 21%
- UPS: 16%
- DPD: 15%
- Hermes: 14%
- GLS: 7%

Best Selling Ecommerce Retailers (Mill.)
- Amazon: €8,816
- Otto: €2,956
- Zalando.de: €1,281
- Notebooksbilliger.de: €751
- MediaMarkt.de: €734
- Lidl.de: €594
- Bonprix.de: €591

This is the light version of the report- you can purchase the full version at www.ecommercefoundation.org/shop
Northern Europe
Northern Europe

B2C Ecommerce Turnover & Growth Rate
2013e-2019 (f) (Euro, billions)

Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway and Sweden

Internet penetration: 93%
% of e-shoppers: 77%
Average Spending: €2,045
Average Spending Growth: 5.4%

This is the light version of the report- you can purchase the full version at www.ecommercefoundation.org/shop

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Year</th>
<th>E-GDP (share of GDP made up by ecommerce sales)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>2.10%</td>
</tr>
<tr>
<td>2014</td>
<td>2.36%</td>
</tr>
<tr>
<td>2015</td>
<td>2.60%</td>
</tr>
<tr>
<td>2016</td>
<td>2.92%</td>
</tr>
<tr>
<td>2017</td>
<td>3.12%</td>
</tr>
<tr>
<td>2018</td>
<td>3.33%</td>
</tr>
<tr>
<td>2019 (f)</td>
<td>3.58%</td>
</tr>
</tbody>
</table>

e = estimate
## Denmark

### Quick introduction

**2019**

- Population: 5.7 million
- Currency: Danish Krone
- Logistics Performance: 8th
- Ease of Doing Business: 3rd
- E-Government Index: 1st
- Internet Inclusivity: 4th
- GDP Per Capita: 53,100 €

### Ecommerce Environment

**2018**

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Preference/Behavior</th>
<th>Delivery Method Preference/Behavior</th>
<th>Best Selling Ecommerce Retailers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debit or credit card</td>
<td>78%</td>
<td>At home</td>
<td>Zalando</td>
</tr>
<tr>
<td>Smartphone app</td>
<td>10%</td>
<td>Parcel shop</td>
<td>Amazon</td>
</tr>
<tr>
<td>PayPal</td>
<td>4%</td>
<td>Parcel locker station</td>
<td>H&amp;M</td>
</tr>
<tr>
<td>Netbanking</td>
<td>2%</td>
<td>At work</td>
<td>Wish.com</td>
</tr>
<tr>
<td>Invoice</td>
<td>1%</td>
<td></td>
<td>eBay</td>
</tr>
</tbody>
</table>

### Ecommerce facts & figures

**2019**

- Internet penetration: 98%
- % of e-shoppers: 86%
- E-GDP: 6.36%
- Turnover Growth: 12.7%

### B2C Ecommerce Turnover

2013-2019 (f) (Euro, billions)

This is the light version of the report - you can purchase the full version at [www.ecommercefoundation.org/shop](http://www.ecommercefoundation.org/shop)
Estonia

Quick introduction  
2019

- Population: 1.3 million
- Currency: Euro
- Logistics Performance: 36th
- Ease of Doing Business: 16th
- E-Government Index: 16th
- Inclusive Internet: 30th
- GDP Per Capita: 18,967 €

Ecommerce Environment  
2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>48%</th>
<th>31%</th>
<th>10%</th>
<th>8%</th>
<th>1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit card</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank transfer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-Wallets</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepaid cards</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Preference/Behavior</th>
<th>57%</th>
<th>51%</th>
<th>13%</th>
<th>11%</th>
<th>8%</th>
<th>7%</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To a post office/station</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To a parcel shop</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To a parcel locker</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To the retailer’s store</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ecommerce facts & figures  
2019

- Internet penetration: 91%
- % of e-shoppers: 69%
- E-GDP: 1.25%
- Turnover Growth: 34.56%

B2C Ecommerce Turnover  
2013-2019 (f) (Euro, millions)

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop
Finland

Quick introduction 2019

- Population: 5.5 million
- Currency: Euro
- Logistics Performance: 10th
- Ease of Doing Business: 17th
- E-Government Index: 6th
- Inclusive Internet: 6th
- GDP Per Capita: 42,393 €

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank transfer</td>
<td>53%</td>
</tr>
<tr>
<td>Cards</td>
<td>23%</td>
</tr>
<tr>
<td>E-wallet</td>
<td>12.2%</td>
</tr>
<tr>
<td>E-invoice</td>
<td>7.4%</td>
</tr>
<tr>
<td>Cash on delivery</td>
<td>3%</td>
</tr>
</tbody>
</table>

Best Selling Ecommerce Retailers

- Verkkokauppa.com
- Gigantti.fi
- Power.fi
- Zalando.fi
- Motonet.fi
- Prisma.fi
- Cdon.fi

Ecommerce facts & figures 2019

- Internet penetration: 96%
- % of e-shoppers: 72%
- E-GDP: 1.34%
- Turnover Growth: 8.21%

B2C Ecommerce Turnover 2013e-2019 (f) (Euro, billions)

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop
Iceland

Quick introduction 2019

- Population: 340 thousand
- Currency: Icelandic Krona
- Logistics Performance: 40th
- Ease of Doing Business: 21st
- E-Government Index: 19th
- GDP Per Capita: 63,642 €

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit cards</td>
<td>92%</td>
</tr>
<tr>
<td>Bank transfers</td>
<td>2%</td>
</tr>
<tr>
<td>E-wallets</td>
<td>2%</td>
</tr>
<tr>
<td>Mobiles</td>
<td>2%</td>
</tr>
<tr>
<td>Prepaid cards</td>
<td>2%</td>
</tr>
</tbody>
</table>

Ecommerce facts & figures 2019

- Internet penetration: 99%
- % of e-shoppers: 77%
- E-GDP: 3.06%
- Turnover Growth: 11.68%

B2C Ecommerce Turnover 2013e-2019* (f) (Euro, millions)

*The exchange rate (Icelandic Krona -> Euro) decreased in 2019 by around 5%
Latvia

Quick introduction
2019
• Population 1.9 million
• Currency Euro
• Logistics Performance 70th
• Ease of Doing Business 19th
• E-Government Index 57th
• GDP Per Capita 15,466 €

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit cards</td>
<td>43%</td>
</tr>
<tr>
<td>Mobiles</td>
<td>39%</td>
</tr>
<tr>
<td>E-wallets</td>
<td>14%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>1%</td>
</tr>
<tr>
<td>Prepaid cards</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Behaviors/Preferences</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>To a post office/post station</td>
<td>71%</td>
</tr>
<tr>
<td>At home</td>
<td>57%</td>
</tr>
<tr>
<td>To a parcel locker station</td>
<td>42%</td>
</tr>
<tr>
<td>At work</td>
<td>17%</td>
</tr>
<tr>
<td>Parcel shop</td>
<td>15%</td>
</tr>
<tr>
<td>Retailer’s store</td>
<td>7%</td>
</tr>
</tbody>
</table>

Ecommerce facts & figures
2019
• Internet penetration 84%
• % of e-shoppers 55%
• E-GDP 1.10%
• Turnover Growth 14%

B2C Ecommerce Turnover
2013e-2019 (f) (Euro, millions)

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop
Lithuania

Quick introduction 2019
- Population: 2.8 million
- Currency: Euro
- Logistics Performance: 54th
- Ease of Doing Business: 14th
- E-Government Index: 40th
- GDP Per Capita: 15,589 €

Ecommerce facts & figures 2019
- Internet penetration: 83%
- % of e-shoppers: 55%
- E-GDP: 1.41%
- Turnover Growth: 23.81%

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobiles</td>
<td>51%</td>
</tr>
<tr>
<td>Credit cards</td>
<td>37%</td>
</tr>
<tr>
<td>E-wallets</td>
<td>1%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>1%</td>
</tr>
<tr>
<td>Prepaid cards</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Behaviors/Preferences</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>73%</td>
</tr>
<tr>
<td>To a post office/station</td>
<td>50%</td>
</tr>
<tr>
<td>To a parcel locker station</td>
<td>38%</td>
</tr>
<tr>
<td>At work</td>
<td>21%</td>
</tr>
<tr>
<td>To the retailer’s store</td>
<td>16%</td>
</tr>
<tr>
<td>To a parcel shop</td>
<td>12%</td>
</tr>
</tbody>
</table>

This is the light version of the report - you can purchase the full version at www.ecommercefoundation.org/shop
**Quick introduction 2019**

- Population: 5.3 million
- Currency: Norwegian Krone
- Logistics Performance: 21st
- Ease of Doing Business: 7th
- E-Government Index: 14th
- GDP Per Capita: 69,949 €

**Ecommerce facts & figures 2019**

- Internet penetration: 98%
- % of e-shoppers: 81%
- E-GDP: 3.84%
- Turnover Growth: 2.20%

**Ecommerce Environment 2018**

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>51%</th>
<th>18%</th>
<th>14%</th>
<th>14%</th>
<th>1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank/credit card</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PayPal/Klarna</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vipps</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet bank</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Behaviors/Preferences</th>
<th>62%</th>
<th>22%</th>
<th>6%</th>
<th>2%</th>
<th>2%</th>
<th>1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pickup point</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mailbox</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home delivery before 16.00 (unsigned)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pickup at retailer’s store</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home delivery after 16.00 (signed)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery at work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Best Selling Ecommerce Retailers**

- Komplett
- Elkjøp
- Zalando.no
- XXL
- Ikea
- Boozt
- Kolonial.no

This is the light version of the report— you can purchase the full version at [www.ecommercefoundation.org/shop](http://www.ecommercefoundation.org/shop)
Sweden

Quick introduction 2019

- Population: 10 million
- Currency: Swedish Krona
- Logistics Performance: 2nd
- Ease of Doing Business: 12th
- E-Government Index: 5th
- Inclusive Internet: 1st
- GDP Per Capita: 47,253 €

Ecommerce facts & figures 2019

- Internet penetration: 94%
- % of e-shoppers: 84%
- E-GDP: 1.78%
- Turnover Growth: 13.08%

B2C Ecommerce Turnover 2013e-2019 (f) (Euro, billions)

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice</td>
<td>38%</td>
</tr>
<tr>
<td>Account/credit card</td>
<td>22%</td>
</tr>
<tr>
<td>Direct banking</td>
<td>14%</td>
</tr>
<tr>
<td>Swish</td>
<td>12%</td>
</tr>
<tr>
<td>Paypal/Payson</td>
<td>8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Behaviors/Preferences</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pickup location</td>
<td>39%</td>
</tr>
<tr>
<td>Home delivery in evening</td>
<td>11%</td>
</tr>
<tr>
<td>Parcel machine</td>
<td>4%</td>
</tr>
<tr>
<td>Home delivery during day</td>
<td>4%</td>
</tr>
<tr>
<td>Home delivery in postbox</td>
<td>3%</td>
</tr>
<tr>
<td>Other (work, retailer store, etc.)</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Selling Ecommerce Retailers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Apotea</td>
<td></td>
</tr>
<tr>
<td>CDON.com</td>
<td></td>
</tr>
<tr>
<td>Zalando</td>
<td></td>
</tr>
<tr>
<td>Adlibris</td>
<td></td>
</tr>
<tr>
<td>H&amp;M</td>
<td></td>
</tr>
<tr>
<td>Webhallen</td>
<td></td>
</tr>
<tr>
<td>Wish</td>
<td></td>
</tr>
</tbody>
</table>

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop
Central Europe
Central Europe

B2C Ecommerce Turnover & Growth Rate
2013-2019 (f) (Euro, billions)

Ecommerce Environment
2018

- Internet penetration: 81%
- % of e-shoppers: 66%
- Average Spending: €851
- Average Spending Growth: 2.3%

<table>
<thead>
<tr>
<th>E-GDP (share of GDP made up by e-commerce sales)</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019 (f)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.96%</td>
<td>1.14%</td>
<td>1.45%</td>
<td>1.64%</td>
<td>1.80%</td>
<td>1.94%</td>
<td>2.09%</td>
</tr>
</tbody>
</table>

This is the light version of the report; you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction

2019

- Population: 8.7 million
- Currency: Euro
- Logistics Performance: 4th
- Ease of Doing Business: 26th
- E-Government Index: 20th
- Inclusive Internet: 15th
- GDP Per Capita: 44,089 €

Ecommerce Environment

2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit card</td>
<td>93%</td>
</tr>
<tr>
<td>Wallet/PayPal</td>
<td>80%</td>
</tr>
<tr>
<td>Invoice</td>
<td>64%</td>
</tr>
<tr>
<td>Instant transfer</td>
<td>52%</td>
</tr>
<tr>
<td>Transfer</td>
<td>48%</td>
</tr>
<tr>
<td>Cash on delivery</td>
<td>30%</td>
</tr>
<tr>
<td>SEPA</td>
<td>22%</td>
</tr>
<tr>
<td>Hire-Purchase</td>
<td>18%</td>
</tr>
<tr>
<td>Debit card</td>
<td>14%</td>
</tr>
</tbody>
</table>

| Delivery Method Behaviors/Preferences | |
|--------------------------------------|-
| Österreichische Post                  | |
| Deutsche Post DHL Carrier            | |
| Pickup/Click & Collect                | |
| UPS                                   | |
| Whitelabel                            | |
| DPD                                   | |

Ecommerce facts & figures

2019

- Internet penetration: 89%
- % of e-shoppers: 70%
- E-GDP: 1.97%
- Turnover Growth: 5.50%

B2C Ecommerce Turnover

2013-2019 (f) (Euro, billions)

Best Selling Ecommerce Retailers

- Amazon.de
- Zalando.at
- Universal.at
- Ottoversand.at
- E-tec.at
- Electronic4you.at
- Eduscho.at

This is the light version of the report. You can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction

2019

- Population: 10.6 million
- Currency: Czech Koruna
- Logistics Performance: 22nd
- Ease of Doing Business: 35th
- E-Government Index: 54th
- Inclusive Internet: 41st
- GDP Per Capita: 19,389 €

Ecommerce Environment

2018

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment card</td>
<td>39%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>22%</td>
</tr>
<tr>
<td>Payment on delivery (card or cash)</td>
<td>21%</td>
</tr>
<tr>
<td>Payment during personal pick-up (card or cash)</td>
<td>14%</td>
</tr>
<tr>
<td>PayPal etc.</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Methods</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home delivery</td>
<td>66%</td>
</tr>
<tr>
<td>Pick-up points of third parts</td>
<td>19%</td>
</tr>
<tr>
<td>Work office delivery</td>
<td>11%</td>
</tr>
<tr>
<td>On-line shop pick-up points</td>
<td>4%</td>
</tr>
</tbody>
</table>

Ecommerce facts & figures

2019

- Internet penetration: 88%
- % of e-shoppers: 68%
- E-GDP: 2.95%
- Turnover Growth: 16%

B2C Ecommerce Turnover

2013-2019 (f) (Euro, billions)

This is the light version of the report. You can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019

- Population 9.6 million
- Currency Hungarian Forint
- Logistics Performance 31st
- Ease of Doing Business 53rd
- E-Government Index 45th
- Internet Inclusivity 28th
- GDP Per Capita 13,165 €

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Cash on delivery</th>
<th>Card during personal pickup</th>
<th>Cash during personal pickup</th>
<th>Online payment by card</th>
<th>Bank transfer</th>
<th>E-wallet payment (PayPal)</th>
<th>Online loans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>43%</td>
<td>18%</td>
<td>15%</td>
<td>15%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Behaviors/Preferences</th>
<th>Home delivery</th>
<th>External pickup points</th>
<th>Own store/showroom</th>
<th>Own delivery service</th>
<th>Own pickup point</th>
<th>To a parcel locker station</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>51%</td>
<td>22%</td>
<td>19%</td>
<td>5%</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Ecommerce facts & figures
2019

- Internet penetration 80%
- % of e-shoppers 53%
- E-GDP 1.22%
- Turnover Growth 16.54%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, billions)

Best Selling Ecommerce Retailers
- Edigital.hu
- Emag.hu
- Mediamarkt.hu
- Tesco.hu
- 220volt.hu
- Ipon.hu
- Mall.hu
- Alza.hu
- Aqua.hu

This is the light version of the report-you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction 2019

- Population: 38 million
- Currency: Polish Zloty
- Logistics Performance: 28th
- Ease of Doing Business: 33rd
- E-Government Index: 33rd
- Inclusive Internet: 9th
- GDP Per Capita: 13,165 €

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online payment (PayPal, Amazon Payments)</td>
<td>71%</td>
</tr>
<tr>
<td>Cash on delivery</td>
<td>47%</td>
</tr>
<tr>
<td>Credit card</td>
<td>42%</td>
</tr>
<tr>
<td>Cash in advance</td>
<td>38%</td>
</tr>
<tr>
<td>Direct debit</td>
<td>27%</td>
</tr>
<tr>
<td>Prepaid cards/vouchers</td>
<td>20%</td>
</tr>
<tr>
<td>Invoice</td>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Behaviors/Preferences</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Courier</td>
<td></td>
</tr>
<tr>
<td>Parcel Locker</td>
<td></td>
</tr>
<tr>
<td>Letter/package</td>
<td></td>
</tr>
<tr>
<td>Click-and-collect</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Selling Ecommerce Retailers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Allegro</td>
<td></td>
</tr>
<tr>
<td>Empik.com</td>
<td></td>
</tr>
<tr>
<td>Euro.com</td>
<td></td>
</tr>
<tr>
<td>Mediaexpert</td>
<td></td>
</tr>
<tr>
<td>Zalando</td>
<td></td>
</tr>
<tr>
<td>Eobuwie</td>
<td></td>
</tr>
<tr>
<td>Castorama</td>
<td></td>
</tr>
<tr>
<td>Leroymerlin</td>
<td></td>
</tr>
<tr>
<td>Iperfumy by notino</td>
<td></td>
</tr>
</tbody>
</table>

Ecommerce facts & figures 2019

- Internet penetration: 77%
- % of e-shoppers: 61%
- E-GDP: 2.31%
- Turnover Growth: 25%

B2C Ecommerce Turnover 2013-2019 (f) (Euro, billions)

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019
- Population: 8.6 million
- Currency: Swiss Franc
- Logistics Performance: 11th
- Ease of Doing Business: 38th
- E-Government Index: 15th
- Inclusive Internet: 22nd
- GDP Per Capita: 72,078 €

Ecommerce facts & figures
2019
- Internet penetration: 98%
- % of e-shoppers: 89%
- E-GDP: 1.87%
- Turnover Growth: 5.64%

Ecommerce Environment
2018

Payment Method Preference/Use
- Invoice: 64%
- Credit card: 58%
- PayPal: 37%
- PostFinance/e-finance: 19%
- Payment in advance: 13%
- Cash on collection: 11%
- Mobile payment: 4%
- Bitcoin/cryptocurrency: 2%
- Debit card: 14%

Delivery Method Behaviors/Preferences
- At home: 88%
- To a post office/station: 12%
- At work: 9%
- To a parcel shop: 8%
- To the retailer store: 4%
- To a parcel locker station: 3%

Best Selling Ecommerce Retailers
- Digitec.ch
- Zalando.ch
- Amazon.de
- Nespresso.ch
- Brack.ch
- Leshop.ch
- Micropoint.ch

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Eastern Europe
Eastern Europe

B2C Ecommerce Turnover & Growth Rate
2013e-2019 (f) (Euro, billions)

Ecommerce Environment
2018

- Internet penetration: 71%
- % of e-shoppers: 52%
- Average Spending: €276
- Average Spending Growth: 5%

<table>
<thead>
<tr>
<th>E-GDP (share of GDP made up by ecommerce sales)</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019 (f)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.41%</td>
<td>0.50%</td>
<td>0.72%</td>
<td>1%</td>
<td>1.12%</td>
<td>1.30%</td>
<td>1.47%</td>
</tr>
</tbody>
</table>

This is the light version of the report - you can purchase the full version at www.ecommercefoundation.org/shop
Bulgaria

Quick introduction
2019
- Population: 7 million
- Currency: Bulgarian lev
- Logistics Performance: 52nd
- Ease of Doing Business: 59th
- E-Government Index: 47th
- Inclusive Internet: 26th
- GDP Per Capita: 7,670 €

Ecommerce Environment
2018

The Bulgarian E-Commerce Association has serious concerns that "Ordinance H-18 on the Registration and Reporting by Fiscal Devices of Sales at Commercial Sites" by the Ministry of Finance is not in line with the Digital Single Market Strategy and creates barriers for Bulgarian digital companies. Bulgarian companies dealing with ecommerce are in a less favorable position than international players.

Ecommerce facts & figures
2019
- Internet penetration: 67%
- % of e-shoppers: 31%
- E-GDP: 1.67%
- Growth: 30%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, millions)

Payment Method Preference/Use

<table>
<thead>
<tr>
<th>Method</th>
<th>Preference/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash on delivery</td>
<td>70%</td>
</tr>
<tr>
<td>Credit &amp; debit cards</td>
<td>25%</td>
</tr>
<tr>
<td>Bank &amp; internet payments</td>
<td>5%</td>
</tr>
</tbody>
</table>

This is the light version of the report - you can purchase the full version at www.ecommercefoundation.org/shop
Russia

Quick introduction
2019
- Population: 143 million
- Currency: Russian Ruble
- Logistics Performance: 75th
- Ease of Doing Business: 31st
- E-Government Index: 32nd
- Inclusive Internet: 19th
- GDP Per Capita: 9,725 €

Ecommerce facts & figures
2019
- Internet penetration: 76%
- % of e-shoppers: 70%
- E-GDP: 1.32%
- Turnover Growth: 13.41%

B2C Ecommerce Turnover
2013e-2019 (f) (Euro, billions)

Payment Method Preference/Use

<table>
<thead>
<tr>
<th>Method</th>
<th>Preference/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>By card</td>
<td>57%</td>
</tr>
<tr>
<td>PayPal, Yandex, etc.</td>
<td>37%</td>
</tr>
<tr>
<td>Bank mobile app</td>
<td>36%</td>
</tr>
<tr>
<td>Online banking</td>
<td>29%</td>
</tr>
<tr>
<td>SMS</td>
<td>25%</td>
</tr>
</tbody>
</table>

Delivery Method Behaviors/Preferences

<table>
<thead>
<tr>
<th>Method</th>
<th>Behaviors/Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online shop itself</td>
<td>40%</td>
</tr>
<tr>
<td>Customer pickup</td>
<td>29%</td>
</tr>
<tr>
<td>Russian post</td>
<td>26%</td>
</tr>
<tr>
<td>Courier</td>
<td>17%</td>
</tr>
<tr>
<td>Giveaway outlet</td>
<td>17%</td>
</tr>
<tr>
<td>To a parcel locker station</td>
<td>3%</td>
</tr>
</tbody>
</table>

Best Selling Ecommerce Retailers

- Wildberries.ru
- Citilink.ru
- Mvideo.ru
- Ozon.ru
- Dns-shop.ru
- Lamoda.ru
- Eldorado.ru

Ecommerce Environment
2018

This is the light version of the report - you can purchase the full version at www.ecommercefoundation.org/shop

e = estimate
Quick introduction 2019

- Population: 43 million
- Currency: Ukrainian hryvnia
- Logistics Performance: 66th
- Ease of Doing Business: 71st
- E-Government Index: 82nd
- Inclusive Internet: 34th
- GDP Per Capita: 2,564 €

Ecommerce facts & figures 2019

- Internet penetration: 67%
- % of e-shoppers: 22%
- E-GDP: 1.90%
- Turnover Growth: 15%

B2C Ecommerce Turnover 2013-2019 (€) (Euro, billions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Turnover (billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td></td>
</tr>
</tbody>
</table>

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Preference/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card payment</td>
<td>36.4%</td>
</tr>
<tr>
<td>Cash to courier or at shop pickup</td>
<td>23.4%</td>
</tr>
<tr>
<td>Seller’s card top-up</td>
<td>13.7%</td>
</tr>
<tr>
<td>Cash at delivery</td>
<td>13.7%</td>
</tr>
<tr>
<td>Card through courier POS or shop pickup</td>
<td>5.4%</td>
</tr>
<tr>
<td>Internet banking or bank branch</td>
<td>2.6%</td>
</tr>
<tr>
<td>Loan, bank paid</td>
<td>2.4%</td>
</tr>
<tr>
<td>Webmoney, PayPal, Yandex Money</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method Behaviors/Preferences</th>
<th>Preference/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pickup at parcel service point</td>
<td>30.6%</td>
</tr>
<tr>
<td>Pickup at Ukrposhta office</td>
<td>22.2%</td>
</tr>
<tr>
<td>E-shop’s courier delivery to office/home</td>
<td>16.1%</td>
</tr>
<tr>
<td>Pickup by myself at e-shop rep office</td>
<td>12.2%</td>
</tr>
<tr>
<td>3rd party service courier delivery to office/home</td>
<td>4.4%</td>
</tr>
<tr>
<td>Pickup at self-service terminal</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019

- Population: 19 million
- Currency: Romanian leu
- Logistics Performance: 48th
- Ease of Doing Business: 52nd
- E-Government Index: 67th
- Inclusive Internet: 26th
- GDP Per Capita: 9,928 €

Ecommerce facts & figures
2019

- Internet penetration: 74%
- % of e-shoppers: 27%
- E-GDP: 2.42%
- Turnover Growth: 30%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, billions)

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>74%</th>
<th>Card payment (debit/credit)</th>
<th>25%</th>
<th>Bank transfer</th>
<th>1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Method Behaviors/Preferences</td>
<td>Fan Courier</td>
<td>Urgent-Cargus</td>
<td>Posta Romana</td>
<td>Sameday</td>
<td></td>
</tr>
<tr>
<td>Best Selling Ecommerce Retailers</td>
<td>eMag.ro</td>
<td>Altex.ro</td>
<td>Cel.ro</td>
<td>Elefant.ro</td>
<td>F64.ro</td>
</tr>
</tbody>
</table>

This is the light version of the report—you can purchase the full version at [www.ecommercefoundation.org/shop](http://www.ecommercefoundation.org/shop)
North Macedonia

Quick introduction
2019
- Population: 2 million
- Currency: Macedonian denar
- Logistics Performance: 81st
- Ease of Doing Business: 10th
- E-Government Index: 79th
- GDP Per Capita: 5,494 €

Ecommerce facts & figures
2019
- Internet penetration: 78%
- % of e-shoppers: 33%
- E-GDP: 1.26%
- Turnover Growth: 3.88%

B2C Ecommerce Turnover
2013e-2019 (f) (Euro, millions)

Ecommerce Environment
2018

Payment Method Preference/Use
- Cash on delivery
- Payment card
- Paychecks (banks & e-banking)

Best Selling Ecommerce Retailers
- Grouper.mk
- Reklama5.mk
- Pazar3.mk
- Sportvision.mk
- Klplkartizase.com
- Brainster.co

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Serbia

Quick introduction
2019

- Population: 8 million
- Currency: Serbian dinar
- Logistics Performance: 65th
- Ease of Doing Business: 48th
- E-Government Index: 49th
- GDP Per Capita: 4,840 €

Ecommerce facts & figures
2019

- Internet penetration: 74%
- % of e-shoppers: 47%
- E-GDP: 0.77%
- Turnover Growth: 14%

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Preference/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepaid cards</td>
<td>76%</td>
</tr>
<tr>
<td>Credit cards</td>
<td>13%</td>
</tr>
<tr>
<td>Mobiles</td>
<td>8%</td>
</tr>
<tr>
<td>E-wallets</td>
<td>2%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>1%</td>
</tr>
</tbody>
</table>

This is the light version of the report- you can purchase the full version at www.ecommercefoundation.org/shop
Southern Europe
Southern Europe

Croatia, Cyprus, Greece, Italy, Malta, Portugal, Turkey and Spain

B2C Ecommerce Turnover & Growth Rate
2013-2019 (f) (Euro, billions)

Ecommerce Environment
2018

- Internet penetration: 77%
- % of e-shoppers: 47%
- Average Spending: €1,030
- Average Spending Growth: 6.37%

<table>
<thead>
<tr>
<th>Year</th>
<th>E-GDP (share of GDP made up by ecommerce sales)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>0.92%</td>
</tr>
<tr>
<td>2014</td>
<td>1.08%</td>
</tr>
<tr>
<td>2015</td>
<td>1.18%</td>
</tr>
<tr>
<td>2016</td>
<td>1.40%</td>
</tr>
<tr>
<td>2017</td>
<td>1.62%</td>
</tr>
<tr>
<td>2018</td>
<td>1.92%</td>
</tr>
<tr>
<td>2019 (f)</td>
<td>2.29%</td>
</tr>
</tbody>
</table>

This is the light version of the report - you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019
- Population: 4 million
- Currency: Croatian kuna
- Logistics Performance: 49th
- Ease of Doing Business: 58th
- E-Government Index: 55th
- GDP Per Capita: 12,422 €

Ecommerce facts & figures
2019
- Internet penetration: 70%
- % of e-shoppers: 48%
- E-GDP: 0.87%
- Turnover Growth: 6.17%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, millions)

Payment Method Preference/Use
- Mobiles: 61%
- Credit cards: 22%
- E-wallets: 9%
- Bank transfer: 7%
- Prepaid cards: 1%

Delivery Method Behaviors/Preferences
- At home: 89%
- To a post office/station: 26%
- At work: 11%
- To the retailer’s store: 3%
- To a parcel locker station: 2%
- To a parcel shop: 2%

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Cyprus

Quick introduction
2019
- Population: 1.2 million
- Currency: Euro
- Logistics Performance: 45th
- Ease of Doing Business: 57th
- E-Government Index: 36th
- GDP Per Capita: 16,057 €

Ecommerce facts & figures
2019
- Internet penetration: 86%
- % of e-shoppers: 39%
- E-GDP: 1.28%
- Turnover Growth: 11.11%

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepaid cards</td>
<td>60%</td>
</tr>
<tr>
<td>Mobiles</td>
<td>18%</td>
</tr>
<tr>
<td>Credit cards</td>
<td>17%</td>
</tr>
<tr>
<td>E-wallets</td>
<td>2%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>0%</td>
</tr>
</tbody>
</table>

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019

- Population: 11 million
- Currency: Euro
- Logistics Performance: 42nd
- Ease of Doing Business: 72nd
- E-Government Index: 35th
- Inclusive Internet: 27nd
- GDP Per Capita: 16,057 €

Ecommerce facts & figures
2019

- Internet penetration: 72%
- % of e-shoppers: 50%
- E-GDP: 2.96%
- Turnover Growth: 7%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, billions)

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction 2019

- Population: 59 million
- Currency: Euro
- Logistics Performance: 19th
- Ease of Doing Business: 51st
- E-Government Index: 24th
- Inclusive Internet: 20th
- GDP Per Capita: 29,949 €

Ecommerce Environment 2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Delivery Method Behavior/Preferences</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit cards</td>
<td>At home</td>
<td>76.4%</td>
</tr>
<tr>
<td>PayPal</td>
<td>Collected (in store, locker, post office)</td>
<td>8.9%</td>
</tr>
<tr>
<td>Cash on delivery</td>
<td>Received at office</td>
<td>8.4%</td>
</tr>
<tr>
<td>Bank transfer</td>
<td>Received at another person's home</td>
<td>3.9%</td>
</tr>
<tr>
<td>Other</td>
<td>I still have not received the parcel</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Selling Ecommerce Retailers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon</td>
</tr>
<tr>
<td>Zalando</td>
</tr>
<tr>
<td>Apple</td>
</tr>
<tr>
<td>Privalia</td>
</tr>
<tr>
<td>Esselungaacasa</td>
</tr>
<tr>
<td>Yoox</td>
</tr>
</tbody>
</table>

Ecommerce facts & figures 2019

- Internet penetration: 79%
- % of e-shoppers: 48%
- E-GDP: 2.01%
- Turnover Growth: 30%

B2C Ecommerce Turnover 2013-2019 (f) (Euro, billions)

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019

- Population: 433 thousand
- Currency: Euro
- Logistics Performance: 69th
- Ease of Doing Business: 84th
- E-Government Index: 30th
- GDP Per Capita: 26,975 €

Ecommerce facts & figures
2019

- Internet penetration: 83%
- % of e-shoppers: 67%
- E-GDP: 0.18%
- Turnover Growth: 15%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, millions)

This is the light version of the report; you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019

- Population: 10 million
- Currency: Euro
- Logistics Performance: 23rd
- Ease of Doing Business: 34th
- E-Government Index: 29th
- Inclusive Internet: 13th
- GDP Per Capita: 19,648 €

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>Delivery Methods</th>
<th>Best Selling Ecommerce Retailers</th>
</tr>
</thead>
<tbody>
<tr>
<td>MB payment of services (National Scheme)</td>
<td>At home: 75%</td>
<td>AliExpress</td>
</tr>
<tr>
<td>Credit card</td>
<td>At work: 25%</td>
<td>eBay</td>
</tr>
<tr>
<td>MB WAY (National Scheme)</td>
<td>Post office: 19%</td>
<td>Amazon</td>
</tr>
<tr>
<td>PayPal</td>
<td>Parcel shop: 10%</td>
<td>FNAC</td>
</tr>
<tr>
<td></td>
<td>Retailers store: 11%</td>
<td>Worten</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Continente</td>
</tr>
<tr>
<td></td>
<td></td>
<td>La Redoute</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Wook</td>
</tr>
</tbody>
</table>

Ecommerce facts & figures
2019

- Internet penetration: 75%
- % of e-shoppers: 50%
- E-GDP: 2.78%
- Turnover Growth: 9.73%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, billions)

This is the light version of the report—you can purchase the full version at www.ecommercefoundation.org/shop
Quick introduction
2019
• Population 82 million
• Currency Turkish Lira
• Logistics Performance 47th
• Ease of Doing Business 43rd
• E-Government Index 53rd
• Inclusive Internet 41st
• GDP Per Capita 7,272 €

Ecommerce facts & figures
2019
• Internet penetration 73%
• % of e-shoppers 36%
• E-GDP 2.09%
• Turnover Growth 9.72%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, billions)

This is the light version of the report— you can purchase the full version at www.ecommercefoundation.org/shop

Ecommerce Environment
2018

<table>
<thead>
<tr>
<th>Payment Method Preference/Use</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit cards</td>
<td>82%</td>
</tr>
<tr>
<td>Cash in advance</td>
<td>50%</td>
</tr>
<tr>
<td>Cash on delivery</td>
<td>40%</td>
</tr>
<tr>
<td>Direct debit</td>
<td>38%</td>
</tr>
<tr>
<td>Invoice</td>
<td>22%</td>
</tr>
<tr>
<td>Online payment (PayPal, Amazon)</td>
<td>18%</td>
</tr>
<tr>
<td>Prepaid cards/vouchers</td>
<td>9%</td>
</tr>
</tbody>
</table>
Quick introduction
2019

- Population: 46 million
- Currency: Euro
- Logistics Performance: 17th
- Ease of Doing Business: 30th
- E-Government Index: 17th
- Inclusive Internet: 12th
- GDP Per Capita: 26,835 €

Ecommerce Environment
2018

Payment Method Preference/Use
- Debit/credit card
- PayPal/similar
- Cash on delivery

Delivery Method Behaviors/Preferences
- Home delivery
- Office delivery
- Private set

Best Selling Ecommerce Retailers
- Amazon
- El Corte Inglés
- Carrefour
- Pc Componentes
- Zalando
- MediaMarkt

Internet penetration: 88%
% of e-shoppers: 63%
E-GDP: 2.69%
Turnover Growth: 20%

B2C Ecommerce Turnover
2013-2019 (f) (Euro, billions)
#4 Expert Opinions & Advice
Q: Looking back at the GDPR implementation from 2018, how do you feel this has impacted the European (and wider) ecommerce industry?

A: When I look back at the months just before the GDPR implementation, then the first thing that comes to mind is how many companies were attending our GDPR readiness events and how much content was written about that topic. I felt this was a turning point for brands to really start thinking about the customer experience, and for customers to be even more aware about the value of their personal data. I'm happy about the fact that, now, brands are putting a lot of thought into shaping meaningful experiences for their customers, finding smart ways to treat customer data and giving them something in return, at every step of the buying journey.

“...[find] smart ways to treat customer data and giving them something in return.”

Q: The debate still rages regarding privacy and our online shopping experiences. Personalisation is core to many ecommerce strategies. Do you think these two sides can coincide?

A: Absolutely. Many consumers expect a personalised customer experience and are aware that, in return, they will be sharing some data about themselves. Technology is also developing really quickly, so even with minimal data it's already possible to deliver a personalized experience by instantly responding to customers' signals. In the end, I believe it's about making clear what it is that customers get in return. And it's about asking for it at the right time. For example, when visiting a web shop, most people are not willing to leave their mobile phone number. But at the point of ordering a product, they might feel more confident to do so, as it may help with the delivery. It's not even a question if privacy and personalisation can exist together, they are fully connected.
Q: Where do you see voice search in the customer journey in the upcoming year?

A: Let’s state some simple facts: voice shopping is expected to increase twenty-fold by 2022, so it is already gaining a preponderant place in the customer journey. Connected to this, mobile commerce is expected to take nearly half of all e-commerce sales over the next two years or so.

Those are clear signals for e-commerce retailers and brands to put the customer at the center of their strategies, by instantly delivering the answers that consumers are looking for any time they wish to have an interaction with them, no matter the device, channel or type of search. The ability to deliver solutions when consumers ask for them will be key to build long-term, trusted relationships.

Q: What topic or area of e-commerce has piqued your interest this year, and why?

A: Well, besides all the great technology, ethical commerce is a thing now for more and more consumers. Think about very detailed product information, but also packaging, shipping distances and if a brand is socially responsible. Consumers want to feel good about the products they buy and I’m confident that ethical commerce will be a huge focus in the upcoming years. In the end, it is all about building a trusted relationship between brands and consumers.

“...mobile commerce is expected to take nearly half of all e-commerce sales over the next two years or so.”
Q: What variations have you noticed in the customer expectation in the different regions when it comes to delivery and returns?

A: First, I have noticed many customers asking for more tracking information and more accurate delivery time information. The data quality is one of the most important features in order to align with the requirements of the marketplaces.

Secondly, the returns management is one of the most requested services above all because many marketplaces have adopted new rules concerning their return management as well as needing services comparable to both a postal and a logistics provider. It means they need a local warehouse where the customer can return the parcels and where the items can be scanned and checked (as common features required by many marketplaces in order to process returns/refunds).

Q: What challenges/frustrations have you heard from clients regarding customs clearance into Italy?

A: Concerning customs, the first issue I have noticed amongst Italian consumers is regarding the CN22 which does not provide a Delivered Duty Paid (DDP) solution to ship products to non-EU countries.

A second issue I have encountered is about the export declaration of the product. Without the customs stamp on CN22, we cannot demonstrate that the parcel effectively left Italy. Concerning Italian law, this can be an issue that prevents the sale of the product inside Italy without the Italian VAT.

“...many marketplaces have adopted new rules concerning their return management...”
Our services definitely have the advantage of simplifying customs processes. It is an incentive for customers to sell their products worldwide and taking advantage of the “low-cost marketing” that many nations offer through various channels.

Q: Brexit is looming large over the heads of many ecommerce businesses. From a logistics point of view, what has been the biggest concern in Italy?

A: Brexit could bring us advantages and disadvantages. The main disadvantage is that many customers ask to have more details but we are not able to provide them more information, which makes this situation of uncertainty more complicated to manage. On the other side, the advantages exceed the disadvantages.

For instance, many customers with a logistic base or warehouses in the UK seek more information or potential costs in the case of relocation to Italy. One more advantage is that it will make it easier to ship items from EU countries to the UK via postal service. This is due to the fact that customs will be an additional issue for express couriers if the UK and Brussels do not find an agreement before the Brexit deadline in October.

“...without a stamp of customs on CN22 you cannot demonstrate that the parcels left the Italian border and this is an issue due to Italian law.”
Q: When it comes to engaging a consumer at all points of their ecommerce journey, where do you believe that European online stores can do better?

A: The shopping journey is often a multi-faceted path made up of disjointed channels. But shoppers want consistency – not disjointed experiences. Most of retail customers expect a consistent level of service regardless of where they are engaging with retailers.

To win in today's marketplace, it is essential for retailers to remove experience friction and gaps across the buying journey. Unifying the retail experience means having the right information and tools in place at the right time. Only then can a retailer enable their customers to conveniently inquire, buy, deliver, return, exchange, or resolve anywhere and everywhere they want.

It is important to recast a retailer's approach to delivering customer experiences and to quickly evolve sales and customer service capabilities into the frictionless and consistent omnichannel selling and customer engagement experiences customers seek.

Q: How can omnichannel improve the customer shopping journey? How do you see innovative solutions (robots, chatbots, social listening etc.) influencing and affecting omnichannel fulfilment?

A: As digital and physical channels blend, connected consumers expect seamless experiences as mentioned. This expectation is especially apparent in ordering and delivery. Customers expect click and collect and other fulfilment options, such as next-day shipping, as standard features. Ultimately, a retailer's order fulfilment flexibility and accuracy go a long way in influencing customer satisfaction and loyalty.

Omnichannel fulfilment is an essential part of providing a frictionless experience that delights customers. Next-generation fulfilment...
Capabilities and technologies will help retailers exceed customer expectations and do so profitably.

Market leading order management, network fulfilment, store fulfilment and other capabilities enable retailers to always deliver on the omnichannel promise while driving the operational efficiency needed for omnichannel profitability.

Customers believe that they have a relationship with you after they have shopped with you. They want to be recognised, and they want to feel as valuable. They want to be appreciated and listened to—as a retailer it is essential that you are there for them when they need you.

This requires a customer engagement excellence that combines unstructured insight, like social conversations, within the same view as the real-time customer order, transaction history and tendency data. Staff and customer service professionals need to see the complete picture of the customer, their preferences and their tendencies, as well as the opportunity to provide them with brand-defining experiences that will keep them coming back again and again.

Modern retailers need to adapt quickly and efficiently to match the constant variations in customer demands. Demands for seamless purchase, fulfilment, and service experiences across channels as well as personalised attention and engaging interactions continue to grow and evolve. This means rethinking how people, processes, systems, data, and logistics work together along every step of the customer journey to remove friction and deliver experience consistency.

“Don't give your customer great experiences, give them their experiences.”
Q: What mistakes have you seen with clients trying to move into the German Market?

A: Never believe, that everything runs as it does in your own country. There are certain differences, which are important. The first point is the shipping costs. Second is the customer support, which should be in the German language, and based in Germany. Thirdly, is the address and phone number, which should also be in Germany.

Q: What tips would you give online stores in helping sites be more responsive?

A: First tip is to put responsiveness above all. We see a lot of shops and websites, which are not responsive. So, a relaunch of the frontend is necessary. If this is done, all the rest is just optimization of the usability. So, it is quite subjective. For a site to be responsive, it is important, to have a clear and logical way to the checkout.

Q: With your 20+ years of experience at Cosmoshop, what has most surprised you about the development of ecommerce in Germany, and where is the next big disruptor on the horizon?

A: The next big disruptor will be the voice commerce and AI – because no one can imagine how fast this technology will grow and its computational strength. Yet currently you cannot even ask a consecutive question (Example: What’s the name of this building I am standing in front of? Then: And when was it built?) – if the AI cannot even understand these two questions together, how should it understand my workspace or even be able to order products in an effective way?

“**For a site to be responsive, it is important, to have a clear and logical way to the checkout.**”
Q: You provide ecommerce consulting services on a multitude of topics. Where do you feel that current online stores (targeting Germans) are falling short?

A: Most shop owners do not have enough time to take care of every single specialty so that optimization (e.g. the checkout to get better conversion,) stays on track. Same thing with collecting big data and offer relevant product suggestions. All topics, which take too much time, or which are too complicated and are low in priority. Most customers run SEO optimization, product exports, A/B Tests, etc.

Q: Your aim has been to develop and optimise ecommerce businesses for the German market. What are some memorable examples of this?

A: We have pushed the growth of babymarkt.de from its first eBay auctions to 5k orders per day. Europark Rust has integrated our Shopsoftware as an in-app-shop, where one can buy tickets in real-time. Same thing with Vodafone, where we built a retail management system with connection to the online store with an integrated announcement system. Individual Software Projects are our strength.

Q: What tips would you give to a brand setting up a website or localizing their existing site for the German consumer?

A: If a German web agency is used for the creation of the site, then all local behaviors will be considered. Special social media networks like Xing or other German websites are useful. The key visual element should use a picture from Germany, not a stock-agency picture which does not fit well with the target audience.

“Shop owners do not have enough time to take care of every single specialty so that optimization... stays on track.”
Q: MultiSafepay offers Alipay to its European consumers. How often do you see it used and what products do you see it used for most?

A: Over the last few years, the number of Chinese tourists travelling to Europe grew substantially, creating an increasingly important source of revenue for the European countries. This creates an interesting opportunity for online shops to attract a new target audience and increase the conversion rate. In fact, both leisure and business travelers consume local services and products while visiting the Member States and the online stores working in ticketing, travelling, hospitality and food industry can enormously benefit from this brand-new target audience. It goes without saying, Chinese consumers’ online behavior differs from Europeans’ online behavior, especially when it comes to payment methods. This is why, offering WeChat and Alipay as well as Chinese language on the payment page can make a difference for an online shop. Chinese consumers are more prone to complete an order when they can pay with a recognized and trusted payment method. Offering a Chinese local payment method would definitely help an online shop to effectively approach the new target market and increase revenue.

Q: What best practices do you have for the checkout phase when going cross-border?

A: For cross-border online purchases, the checkout phase is the most sensitive of all; consumers will only complete a transaction if they feel secure and understand the website environment. It goes without saying that the main goal for an online shop, is to create a “local” shopping experience for their international customers. To achieve this objective and increase sales, it is important to focus on three main topics:

- Local currency should be offered at the checkout and on the payment page - online stores should always make sure that the payment provider is able to offer the currency of their target audiences.
Both the website and the payment flow should preferably be in the native language of the consumer.

Trusted local payment methods should be included in the payment choices at the checkout. In Europe, different countries have different local payment methods and it is a must to offer the target audience their preferred ones.

Q: Ecommerce is increasingly completed on mobile devices & via mobile payment systems. How will this trend develop?

A: It is not a surprise that transactions are being completed more and more via mobile devices every year. Many payment solutions are adapting to the changing environment and some are already fully mobile responsive. This is the case for iDEAL in the Netherlands and Bancontact in Belgium. Thanks to the mobile applications for iDEAL and Bancontact, consumers can complete one-click payments on their phones, simultaneously satisfying the newest requirements for Strong Customer Authentication (pin code and biometric checks). These applications also offer the possibility to finalize desktop transactions with a QR code. Consumers purchasing on desktop simply need to open the mobile application, scan the QR code and authorize the transaction.

Another important upcoming technology to simplify and fasten mobile payments via credit card is tokenization. Thanks to this technology, after the initial payment, the consumer can securely store credit card data for repeat purchases. The consumer does not need to enter any other credit card data, making paying via mobile easier and stimulating repeat purchases.

Moreover, many European countries are experiencing the rise of “post pay” payment methods, a perfect mobile-friendly solution. Consumers do not need to complete the transaction when buying online, payment data is not required, and the consumer can easily pay after receiving the product.
Case Study: Marketplaces in Europe
Leading Marketplaces in Europe

Leading Marketplace by Country
June, 2019

Amazon

eBay

AliExpress
Leading marketplaces, ranked in order by
visitors to the website platform

Austria
- Amazon.de
- Wilhaben.at
- eBay.de

Belgium
- Amazon.fr
- bol.com
- AliExpress.com

Bulgaria
- AliExpress.com
- emag.com
- Amazon.com

Croatia
- eBay.com
- AliExpress.com
- a1.hr

Czech Republic
- Mall.cz
- Aukro.cz
- Heureka.cz

Denmark
- eBay.com
- Amazon.com
- Amazon.de

Finland
- verkkokauppa.com
- eBay.com
- gigantti.fi

France
- Amazon.fr
- Cdiscount.com
- Fnac.com

Germany
- Amazon.de
- eBay.de
- otto.de

Greece
- eBay.com
- e-shop.gr
- AliExpress.com

Hungary
- AliExpress.com
- eBay.com
- emag.hu

Ireland
- Amazon.co.uk
- Amazon.com
- AliExpress.com
## Leading marketplaces, ranked in order by visitors to the website platform

<table>
<thead>
<tr>
<th>Country</th>
<th>Marketplaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>Amazon.it, AliExpress.com, eBay.com</td>
</tr>
<tr>
<td>Portugal</td>
<td>AliExpress.com, eBay, Amazon.com</td>
</tr>
<tr>
<td>Slovakia</td>
<td>AliExpress.com, mall.sk, eBay.com</td>
</tr>
<tr>
<td>Netherlands</td>
<td>Marktplaats.nl, bol.com, AliExpress.com</td>
</tr>
<tr>
<td>Romania</td>
<td>emag.ro, AliExpress.com, Amazon.com</td>
</tr>
<tr>
<td>Spain</td>
<td>Amazon.es, AliExpress.com, eBay.es</td>
</tr>
<tr>
<td>Sweden</td>
<td>Amazon.com, eBay.com, clasohlson.com</td>
</tr>
<tr>
<td>Turkey</td>
<td>hepsiburada.com, gittigidiyor.com, AliExpress.com</td>
</tr>
<tr>
<td>Ukraine</td>
<td>prom.ua, rozetka.com, ria.com</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Amazon.co.uk, eBay.co.uk, Amazon.com</td>
</tr>
<tr>
<td>Norway</td>
<td>Zalando, eBay, Amazon</td>
</tr>
<tr>
<td>Russia</td>
<td>avito.ru, AliExpress.com, market.yandex.ru</td>
</tr>
<tr>
<td>Poland</td>
<td>Allegro.pl, olx.pl, AliExpress.com</td>
</tr>
<tr>
<td>Serbia</td>
<td>AliExpress.com, Amazon.com, eBay.com</td>
</tr>
<tr>
<td>Portugal</td>
<td>AliExpress.com, eBay, Amazon.com</td>
</tr>
<tr>
<td>Spain</td>
<td>Amazon.es, AliExpress.com, eBay.es</td>
</tr>
<tr>
<td>Sweden</td>
<td>Amazon.com, eBay.com, clasohlson.com</td>
</tr>
<tr>
<td>Turkey</td>
<td>hepsiburada.com, gittigidiyor.com, AliExpress.com</td>
</tr>
</tbody>
</table>
**Introduction**

Well-known marketplaces such as Amazon, eBay, Etsy and AliExpress have a large influence in the European ecommerce market. Marketplaces are a way for SMEs, who may not have the resources to set up their own online channel, to reach consumers in the digital world.

**Leading Marketplaces & Platforms in Europe**

**eBay**

eBay is an American multinational ecommerce corporation with the aim of facilitating C2C and B2B sales. It was founded in 1995 as 'AuctionWeb', and officially reamed eBay in 1997. In 1998, eBay expanded to Germany, Australia and the UK. After extensive growth, today it is operating in 180 countries. The eBay headquarters is based in San Jose (Silicon Valley), California. It comprises seven main buildings, each one named after different sales departments on the website (Collectibles, Jewelry, Motors, Music, Sports, Technology and Toys). Moreover, all the conference rooms contained in the buildings are named in correspondence to the building "theme", creating quite a nice company life and atmosphere.

The first item on eBay was a broken pointer that Pierre Omidyar (eBay founder) used to entertain his cat. For the first week, no one placed a bid, but then the broken pointer sold at a total of $14.83. The UK has quite high amounts of visits every month - around 19 million. British consumers also buy more eBay items a month per capita than any other country in the world.

**Etsy**

Etsy is an ecommerce website focused on handmade and vintage items, typically C2C, as many of the sellers work from home and have an Etsy shop 'on-the-side'. It was launched in 2005 and today provides services in 10 different languages: German, Spanish, US English, Italian, French, Dutch, Chinese, Portuguese, Polish and UK English.

In 2015, Etsy had sellers in 83 countries, reaching more than 1 million active sellers and 19.8 million active buyers on the site. Currently, Etsy payments is available in 36 countries, however sellers can decide to ship to 'Everywhere Else' in the world as it is a 'global marketplace for unique and creative goods'.

Rob Kalin (founder of Etsy) revealed the he wanted his company's name to be a "nonsense word", and while watching Fellini's movie "8 1/2" he heard etsi (eh si), which means "oh, yes". Etsy is heaven for crafters and shoppers alike, and it allows you to store your favorite products in your account. This way, when you're ready to buy, you can do so in one click. Additionally, this feature helps Etsy to learn its consumers a bit better, so they can recommend similar or related products.

Also innovative about Etsy, you can contact the shop seller directly to ask questions about a product. This option enhances the neighborly C2C vibe of Etsy, providing a sense of community. Consumers love hearing back from the actual seller and creator of the product regarding their questions and concerns.
AliExpress is an online retail service based in China operating internationally and is owned by Alibaba. It was founded in 2009 and facilitates small businesses selling to customers all over the world. It is made up, mainly, of small businesses in China and other locations, such as Singapore. It began with B2B sales buying and selling portal, and then expanded to B2C and C2C. It is currently available in 9 languages: English, Spanish, Dutch, French, Italian, German, Polish, Portuguese and Russian.

Sellers are independent and use AliExpress as a host to sell to consumers and other businesses. The main difference between AliExpress and Amazon is that the former is solely an ecommerce platform and does not sell products directly to consumers, whereas Amazon does sell directly to consumers.

An interesting fact about AliExpress is that it does not allow customers in mainland China to buy from the platform, even though most retailers are Chinese. This is because it was designed to sell to overseas countries. In fact, AliExpress' main language is English, not Chinese. To overcome this, Chinese consumers may rely on 2 solutions:

1) Find a consolidation service in Hong Kong and ship there to consolidate the orders
2) Ordering from 1688.com and TaoBao

Amazon operates retail and marketplace activities. In 2018, it was the fifth largest retailer in Germany and the UK and third largest retailer in the US and with revenues of about one third of the leading retailers. 58% of its sales are now by third party merchants and in the EU it employs c.83,000 people.

Amazon's activities span the different channels of commerce with some six hundred physical stores. Other activities include audiobook service Audible, as well as Kindle e-readers and sale of ebooks.

Amazon's logo is a yellow arrow that looks like a smile underneath the Amazon lettering. Originally, the smile design was meant to convey that, 'We're happy to deliver anything, anywhere,' but an Amazon press release expanded the meaning by emphasizing that the beginning of the smile/arrow started at the 'A' and ended on the 'Z' of "Amazon", indicating that Amazon had everything to fulfill its customers' needs from A-Z.
What about SMEs?

Marketplaces are a way for SMEs, who may not have the resources to set up their own online channel, to reach consumers in the digital world. Marketplaces are a way for them to:

**Extend their geographical reach:** Selling your products through a marketplace helps you increase your reach to consumers in different countries, without having to incur some of the costs of trading in multiple countries.

**Increase customer reach:** Marketplaces have extraordinarily high brand/name recognition amongst consumers. Marketplaces can provide you tools to obtain more information about the customers you have, which can in turn help you target your current and potential customers more accurately. Outsourcing parts of the customer relationship to the marketplace operator, including customer service, deliveries, etc. means that, as a seller, you are giving away aspects of the customer journey in relation to your products and brand.

**Achieving economies of scale & greater efficiencies:** Larger orders due to your online presence can help you generate economies of scale and opportunities to achieve greater efficiencies in your production process. This can help improve your negotiating position as a result of the larger volumes traded. Operating on a marketplace involves service fees and remaining dependent on a marketplace may entail costs.

**Achieve greater credibility & consumer trust:** Selling on a well-known marketplace helps consumers feel more confident about the transactions they make, but also adds credibility to your shop. Marketplace experience and customer reviews increase credibility.

Conclusion

Have you ever sold on a marketplace? Have you made the choice to never? Take the marketplaces survey to share your experiences.

Take a survey about marketplaces
About the authors

Sara Lone
Senior Research Analyst

Sara holds a Master in Public Policy from the University of California, in the United States. Sara oversees the Ecommerce Foundation Research Team in its creation of country reports, custom research, content and webinars. Additionally, Sara presents on research around the world and advises stakeholders in furthering ecommerce globally.

Isabela Fávero
Research Analyst

Isabela holds a Master in Development Economics from the University of Auvergne in France. At Ecommerce Foundation, she is part of the Research Team providing support in data analysis and the creation of country reports. Her interests and experience include analyzing data as well as conducting policy evaluations.

Ludovica Quaglieri
Junior Research Analyst

Ludovica is pursuing a Master in Environmental Economics at Wageningen University and Research, The Netherlands. At Ecommerce Foundation, she is part of the Research Team collecting data and supporting the creation of reports. She is interested in sustainability and data analysis.

Shaun Packiaraja
Content Specialist

Shaun graduated with a Master’s degree in Victimology and Criminal Justice from the University of Tilburg. He works for the Marketing Team at Ecommerce Foundation in creating research-related content. His background is in policy creation and analysis, in addition to practical knowledge of business development.
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, press releases, national statistics offices, retail associations, chambers of commerce, etc.

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.

The source list is presented on the following page, along with clickable links.
Sources used in the report

Population: Worldometers
Internet Penetration, E-shopper Penetration, etc.: Eurostat
Age structure: CIA World Factbook
Logistics Performance Index: Worldbank
Top Marketplaces: Similar Web
Ease of Doing Business Index: Trading Economics
E-government Development Index: United Nations
Internet Inclusivity Index: The Economist Intelligence Unit
GDP: Quandl & IMF
Multiple data points: Statista

PostNord
Paymentwall
Datareportal
Export.gov
Eshopworld.com
Mediametrie

Ukraine, AVentures Capital
Bulgaria, beagbg.com
Cyprus, CCCI
North Macedonian Ecommerce Association
Russia, EWDN
Russia, Data Insights
Disclaimer & Copyright Information

Disclaimer
The National Ecommerce Reports are publications by Ecommerce Foundation, which also owns the copyright for these reports. Although the utmost care has been taken in the construction of these reports, there is always the possibility that some information is inaccurate.

No liability is accepted by Ecommerce Foundation for direct or indirect damage arising pursuant to the use of the report.

Copyright ©
It is not allowed to use information published in this report without the Ecommerce Operation's prior consent. Any violation in this regard will be charged a legal fine of € 25,000 (twenty-five thousand euros), as well as a further penalty of € 2,500 (two thousand, five hundred euros) for every day that this non-compliance continues. However, it is allowed to use small parts of the information published in our reports provided that proper sourcing is used (e.g. “source: www.EcommerceFoundation.org”)