

# European B2C E-commerce Report 2014

Facts, Figures, Infographics & Trends of 2013 and the 2014 Forecast  
of the European B2C E-commerce Market of Goods and Services





Ecommerce Europe  
Rue de Trèves 59-61  
B-1000 Brussels – Belgium  
Tel: +32 (0) 2 502 31 34

Website: [www.ecommerce-europe.eu](http://www.ecommerce-europe.eu)  
Contact us at: [info@ecommerce-europe.eu](mailto:info@ecommerce-europe.eu)  
For reports: [research@ecommerce-europe.eu](mailto:research@ecommerce-europe.eu)  
Twitter: @Ecommerce\_eu

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# Europe B2C E-commerce reports 2014

## Colophon

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Belgium



Czech  
Republic



Denmark



STYRKER  
DANSK  
E-HANDEL



Finland



Finland



France



Greece



Greek e-Commerce Association



Ireland



Italy



IL CONSORZIO DEL COMMERCIO ELETTRONICO ITALIANO



Nether-  
lands



Norway



Poland



Spain



Asociación Española de la Economía Digital



Switzer-  
land



# Table of Contents

<b>INFOGRAPHIC NATIONAL ASSOCIATIONS</b>	<b>page 4</b>
<b>PREFACE</b>	<b>page 5</b>
<b>OUR REPORT PARTNERS</b>	<b>page 6-11</b>
<b>A BRIEF INTRODUCTION TO EUROPE</b>	<b>page 12-16</b>
<i>Overview of the European Countries</i>	<i>page 13</i>
<i>European Digital Single Market</i>	<i>page 15</i>
<i>Impact of E-commerce on the Economy</i>	<i>page 16</i>
<b>GLOBAL B2C E-COMMERCE IN BRIEF</b>	<b>page 17-19</b>
<i>Infographic</i>	<i>page 18</i>
<i>The Global Infographic Explained</i>	<i>page 19</i>
<b>EUROPEAN E-COMMERCE MARKETS</b>	<b>page 20-33</b>
<i>Infographic</i>	<i>page 21</i>
<i>Economic Indicators</i>	<i>page 22</i>
<i>Internet Penetration</i>	<i>page 23</i>
<i>Population and E-households</i>	<i>page 24</i>
<i>Growth in European B2C E-commerce Sales</i>	<i>page 25</i>
<i>Top 10 Countries B2C E-commerce Sales</i>	<i>page 26</i>
<i>Share of Top 10 Countries in B2C E-commerce Sales</i>	<i>page 27</i>
<i>B2C E-commerce Growth Rate per Country</i>	<i>page 28</i>
<i>Online Expenditure per E-shopper</i>	<i>page 29</i>
<i>Online Expenditure per E-household</i>	<i>page 30</i>
<i>Mobile Commerce</i>	<i>page 31</i>
<i>Share and Growth Rate Technical Consumer Goods</i>	<i>page 32</i>
<i>Sales of Popular Technical Consumer Goods</i>	<i>page 33</i>

<b>WESTERN EUROPE</b>	<b>page 34-39</b>
<i>Infographic</i>	<i>page 35</i>
<i>B2C E-commerce Turnover and Growth</i>	<i>page 36</i>
<i>E-commerce markets</i>	<i>page 37</i>
<b>CENTRAL EUROPE</b>	<b>page 40-44</b>
<i>Infographic</i>	<i>page 41</i>
<i>B2C E-commerce Turnover and Growth</i>	<i>page 42</i>
<i>E-commerce markets</i>	<i>page 43</i>
<b>SOUTHERN EUROPE</b>	<b>page 45-49</b>
<i>Infographic</i>	<i>page 46</i>
<i>B2C E-commerce Turnover and Growth</i>	<i>page 47</i>
<i>E-commerce markets</i>	<i>page 48</i>
<b>NORTHERN EUROPE</b>	<b>page 50-54</b>
<i>Infographic</i>	<i>page 51</i>
<i>B2C E-commerce Turnover and Growth</i>	<i>page 52</i>
<i>E-commerce markets</i>	<i>page 53</i>
<b>EASTERN EUROPE</b>	<b>page 55-58</b>
<i>Infographic</i>	<i>page 56</i>
<i>B2C E-commerce Turnover and Growth</i>	<i>page 57</i>
<i>E-commerce markets</i>	<i>page 58</i>
<b>OVERVIEW AND FORECAST</b>	<b>page 59-62</b>
<i>Overview</i>	<i>page 60</i>
<i>Forecast</i>	<i>page 62</i>
<b>ABOUT ECOMMERCE EUROPE</b>	<b>page 63</b>

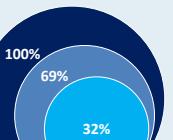
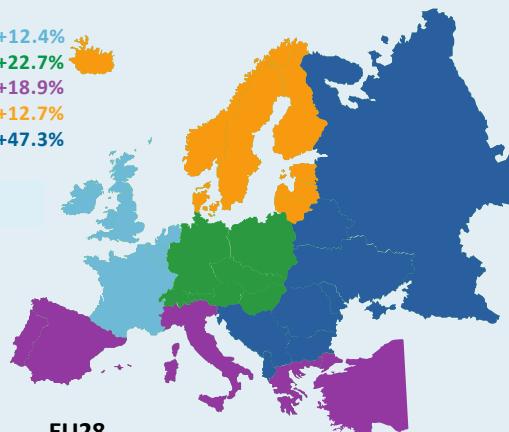
# Ecommerce Europe association data at a glance 2014

West	€ 177.7 bn +12.4%
Central	€ 93.3 bn +22.7%
South	€ 40.8 bn +18.9%
North	€ 31.9 bn +12.7%
East	€ 19.3 bn +47.3%



Europe  
€ 363.1 bn +16.3%

EU28  
€ 317.9 bn +14.7%



**816 million**  
people live in Europe  
**565 million**  
people use the Internet  
**264 million**  
people are e-shoppers

+  
jobs directly or indirectly via e-commerce

**645,000+**  
estimated online businesses

**3.7 bn+**  
number of parcels sent annually (f)

**Our Mission**  
To promote the interest of B2C e-commerce in Europe through advocacy, communication and networking.

## GOMSEC

Global  
Online  
Measurement  
Standard B2C  
E-Commerce



June 8-10 2015  
Barcelona



## Round Tables

Meetings in 8 European cities  
for e-commerce experts and invitees

## European Reports

Reports include country profiles, trends & Infographics.



Reports contain countries:

- Eastern: Rom, Rus, Ukr, a.o.
- Western: BelNelux, Fra, Ire, UK
- Southern: Gre, It, Port, Spa, Turk, a.o.
- Northern: Den, Est, Fin, Lat, Lith, Nor, Swe, a.o.
- Central: Aus, CR, Germ, Hun, Pol, Swi, a.o.

- Positioning papers  
1. e-Regulations  
2. e-Privacy&Transparency  
3. e-Payments  
4. e-Identification & Trust Services  
5. e-logistics

## 15+ leading e-commerce associations



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[www.ecommerce-europe.eu](http://www.ecommerce-europe.eu)  
info: [info@ecommerce-europe.eu](mailto:info@ecommerce-europe.eu)  
reports: [research@ecommerce-europe.eu](mailto:research@ecommerce-europe.eu)

Rue de Trèves 59-61 | B-1000 Brussels | Belgium  
Tel: +32 (0) 2 502 31 34

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# European B2C E-commerce Reports 2014

## Preface

The importance of e-commerce continuous to grow. More and more people buy their products and services online and they do so from various places, such as at home, at work, en route or in the highstreet and sometimes already online in the store. Meanwhile, e-commerce has become a major influence on the European economy. Whereas the European Gross Domestic Product was more than €16.4trn in 2013, the e-GDP accounted for 2.2% of this number. In addition, e-commerce is responsible for the creation of many new jobs and all this makes it a significant economic power in Europe.

Measuring the size and growth of the e-commerce sector in Europe and around the globe is vital for understanding its economic impact and growing contribution. Ecommerce Europe strongly believes that it is with economic facts that messages in support of our industry can be heard. Therefore, we are delighted to present the second edition of the Ecommerce Europe B2C Research Reports. After the initial year, our reports are now an established phenomenon within the European landscape of e-commerce.

In total, Ecommerce Europe annually publishes several reports; five comprehensive regional reports (Western Europe, Northern Europe, Eastern Europe, Southern Europe and Central Europe), a number of global reports and this European report, which includes an overview of the major European markets.

Through the Ecommerce Europe B2C Research Reports we want to share our knowledge with our readers around the world. By means of figures that are based on the Global Online Measurement Standard for B2C E-Commerce (GOMSEC), interviews with e-commerce experts and clear tables and

infographics, we provide online retailers and other stakeholders with practical means that can help them to optimize their businesses.

Naturally, we could not have realized these reports without the help of others. Therefore we want to use this opportunity to express our gratitude to all participating national associations and their individual research partners for providing us with the required data and information. We would also like to thank all participating company members, business partners and stakeholders for their involvement. In addition, we are very grateful to the experts across the world who selflessly invested their time and effort to share their insights. And finally, a special word of thanks goes to our sponsors GlobalCollect, Informatica Corp, RichRelevance and Salesupply, who enable us to make the reports widely available, and to GfK for their close cooperation and involvement.

If you would like to receive additional information, purchase reports or become involved with Ecommerce Europe or one of our national associations so that you can receive the reports for free, please contact us via our website [www.ecommerce-europe.eu](http://www.ecommerce-europe.eu) or send us an email at [research@ecommerce-europe.eu](mailto:research@ecommerce-europe.eu).

Francois Momboisse



President of Ecommerce Europe

Wijnand Jongen



Chair of the Executive Committee

# Our Report Partners

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



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



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RichRelevance is the global leader in omni-channel personalization. More than 160 companies in 40 countries use RichRelevance to turn data into actionable insight, which delivers the most relevant experience for consumers as they shop across web, store and mobile. RichRelevance drives more than one billion decisions every day, and has delivered over \$8 billion in attributable sales to its clients, which include Target, Marks & Spencer and PriceMinister.



Salesupply is a global e-business services company that enables online retailers to achieve profitable international growth faster, more efficiently and with relatively low costs. Salesupply provides a full range of solutions ranging from research and strategy, to effective localization of online shops, followed by complete operational support, traffic generation and brand management.

# “Customer Journeys without an Online Aspect Are Rare”

## The Importance of E-commerce

E-commerce continues to change the face of retail across Europe. GfK recognizes the importance that e-commerce businesses, retailers, manufacturers, and distribution and transport companies have in 2014. The consumer has more information than ever before and it is a rare customer journey that does not have an element of online at some point in that path; whether that be at the research stage or the final purchase decision.

The share of sales now being made online is increasing across the European market, the growth in smartphones and tablet devices has changed the way people shop and the constant connectivity has seen a shift in shopping time and location. With many purchase journeys starting on a smartphone and being completed on another device, it is imperative that the shopping experience is seamless across multiple devices. With a number of retailers still to develop a mobile-enabled experience, an opportunity is being missed to convert a browser to a buyer.

### Success criteria

GfK makes use of the latest research techniques to understand each element of the customer journey, from trigger through to final checkout. By looking at each element of the experience and understanding the way it integrates into the bigger picture, we are able to recognize the key criteria that drive success.

By looking at how brands and retailers are perceived by customers and how this perception translates to sales we can show the impact the user's experience has on the final decision.

As a global business we are able to contextualize the impact shopping habits are having on European e-commerce players. The cross-border nature of global retail as well as the ability to have products and services delivered on a daily basis from all corners of the globe cannot be discounted. Whether there is an opportunity to take advantage of this or a need to create a defensive strategy, GfK has the insight to evaluate all relevant elements.

Understanding what drives or restricts sales and then actually being able to benchmark those sales is going to continue to be important to all online players. In the end, the ability to increase conversion and reduce abandonment is going to come from a clear interpretation of the insights to be derived from the data that exist.



Andrew Phipps  
Global Director at GfK

# "The European Market Changes Constantly"

## Key Trends and Best Practices for Cross-border E-commerce in Europe

Europe is a mature e-commerce market, but it changes and evolves constantly. For merchants, there is still plenty of opportunity for growth by expanding into new European markets. However, the unique dynamics of the European market place do require careful consideration and planning.

While selecting the right payment mix per country is the necessary basis, successful merchants also anticipate and act on macro-trends, such as changes in the regulatory environment, or in consumer behavior and expectations. At the same time, these merchants actively analyze and optimize their businesses through aggressive fraud management and the application of big data analytics.

### Mobile first strategy

In 2014, mobile commerce well and truly arrived in Europe. The use of mobile devices for online shopping and payments is accelerating, with Sweden and the UK in particular matching the global leaders in mobile shopper penetration. In addition, merchants that have adopted the mobile first strategy in both check out and payment pages are seeing considerably higher success rates.

### Big data to monitor risks and identify opportunities

Another big trend that is further maturing in 2014 is the application of big data analytics and visualization to the domain of online payments. E-commerce leaders such as Amazon have been applying big data for years now with the objective of building sophisticated profiles of their consumers for Conversion Rate Optimization (CRO). And with good reason.

Cross-border payments can quickly become very complex and hard to manage. Huge volumes of data need to be analyzed in order to identify issues and

opportunities. By applying analytics and visualization to payments data, merchants can track and compare performance per country, per payment method or per time period, and take appropriate steps to optimize processes.

### Combating sophisticated fraud

Fraud is a fact of life for merchants. This is particularly true for international merchants, because cross-border payments have significantly higher fraud rates than domestic payments. Increasingly, sophisticated fraudsters also take advantage of the shift to mobile payments, where fraud losses are higher as a percentage of revenue.

However, rather than accepting fraud as a cost of doing cross-border business, merchants can take action to minimize its impact. In addition to improving the bottom line, this also limits the risk of the kind of reputation damages that go hand-in-hand with online fraud.

### The year of SEPA?

Finally, 2014 is a watershed year for cross-border payments in the Single Euro Payments Area (SEPA). The goal of SEPA is to create a harmonized payments infrastructure throughout the SEPA countries. This is done through the use of common payment instruments and standards, supported by a regular and accepted legal structure.



John Snoek  
Global Vice President Marketing at GlobalCollect

# “Information Must Be Relevant to Customers”

## Omnichannel Tomorrow Means Predicting the Next Logical Purchase Everywhere

A lot is changing in the landscape of e-commerce. For example, the “e” in e-commerce is disappearing. There is no longer a strict separation between online retail and shopping at bricks-and-mortar shops, as all purchases will take place through omnichannel retailing.

By the end of 2013, 36% of in-store purchases were influenced by digital devices, for instance as consumers compared prices through comparison websites or looked for additional information. This number is expected to have increased to around 50% at the end of 2014.

Companies have to be aware of these developments and invest sufficiently in reaching customers through the several touch points. This way, they will be able to create a flawless customer experience, which is very important for attracting and holding on to customers.

### Real-time experience

The biggest challenge for companies will be real-time experience. For customers it will not be enough to receive information tomorrow or even later today; they want it right away. In other words, fast anticipation is key. By 2017, customer experience is what buyers are going to use to make purchase decisions. Therefore, only companies that can deliver instant information will be successful.

In order to achieve this, retailers must be able to predict the next purchases of customers. When shoppers are about to make a purchase, merchants should offer enticing product and/or service bundles. In addition, once a purchase has been concluded, customers should later receive recommendations through all channels regarding products and/or services that might be interesting to them.

To be able to do this, the motto of offering the right product to the right customer, in the right place and at the right time should be in the company's mindset. In addition, it needs to have the proper technology to execute this strategy.

### Brand-switching

A final aspect that will be very important in the upcoming years is the apparent lack of brand loyalty. In the US, 75% of the consumers state that they easily switch between brands, and for the rest of the world this rate amounts to 60%. Consumers receive an overload of information and in combination with the total transparency of the markets, buying somewhere else is just one click away. Companies have to deal with this by ensuring that their marketing activities only contain relevant information. Commerce Relevancy is taking omnichannel to the next level for customer experience.



**Ben Rund**  
Senior Director Product Marketing  
at Informatica Corp

## Making Customers Feel Special Is the Key to Increasing Conversion Rates

The mature online retail markets are already highly saturated and competition is intense. To make sure that consumers choose, and continue to choose, your product or service over that of your competitors, you have to stand out from the crowd. Naturally, there are numerous ways to achieve this, but in my opinion the best way to go is to optimize your personalization.

### Times are a-changing

When shopping in a brick-and-mortar shop, personalization is a very common aspect. When consumers go to the store, they seek advice from the skilled salesclerk, who is then able to personally help the customer to the best of his or her abilities. However, as shopping has increasingly shifted to the Internet, it has become more difficult for companies to personalize their services.

Still, e-commerce personalization is by no means impossible. On the contrary, as in my opinion it is even vital for a company to survive in this day and age. Unfortunately, it is not possible anymore to match one employee to one customer at a time. Therefore, you will have to find new ways to accomplish personalization in your customer service.

### Possibilities

What web merchants can do is using the information that online customers leave behind when browsing the Internet, for example for welcoming them back to their site. Also, people like to follow trends and online shop owners should anticipate this by making suggestions based on what is popular at the moment and on the customer's shopping behavior.

Other possibilities to personalize your website include providing consumers with the opportunity to give feedback, keeping them up to date about their orders, and providing them with aftercare once they made a purchase.

### Advantages

Personalization makes your customer feel less anonymous, which they will appreciate. As a result they are more inclined to choose your product or service. And, perhaps even more importantly, if they are pleased with the way your company treats them, they will keep coming back to you and probably provide you with very valuable word-of-mouth advertising.

Companies such as Amazon and Netflix are the living proof that personalization works. They have used this tool for many years and as a result, their websites think along with customers. Potential buyers are now provided with reasonable suggestions based on previous site visits and purchases. Making their customers feel special is one of the reasons why Amazon and Netflix are so successful nowadays.



**Pontus Kristiansson**  
Vice President EMEA RichRelevance

# "Cross-border E-commerce Is a Hot Topic"

## Asian Invasion on European Market Is a Blessing in Disguise

In my opinion, cross-border e-commerce is one of the most important current trends in retail. However, many shop owners underestimate the related time-consuming work and the problems that appear when one enters a foreign market.

### **Consumer trust is vital**

Companies cannot simply open a website with another extension than that of their home country and expect their proceeds to increase significantly. They have to adapt their business to the country in which they want to introduce their products or services.

For a successful internationalization, your company has to gain the trust of your potential customer. A first step in accomplishing this is generating a high-quality translation of your website into the language of the target country. In this regards, a machine translation, such as through Google Translate, will not suffice as the many errors in your text will actually be offensive to the people you are trying to reach.

### **Do your research**

Of course, just a proper translation is not enough. You also need to adapt to the culture of the audience you want to target. What works for Germany does not necessarily have to work for China or Brazil, for instance. Therefore, you will have to investigate, among other things, relevant trust marks, payment options, and laws and regulations. In addition, you should learn how other successful companies operate in that particular country.

As I said before, it is crucial for a foreign company to get the consumers' trust. Another essential factor in this process is to install a local customer service in your target country. These employees can then deal with customer requests or complaints in the required language and, equally important, in the right time zone. This way, your customers in Latin America or Asia do not have to wait until the business day gets underway in Europe.

### **Asian invasion**

Tackling the time difference is becoming increasingly important as intercontinental cross-border selling is one of the latest developments in the field of e-commerce. Especially Asia is a popular market for European companies as more and more Asian enterprises want to do business with our continent. Some people see the Asian invasion on the European market as a threat, and there are some good reasons for this, but I mainly consider this a great opportunity for European companies to increase their market.

Naturally, there are lots of other places in the world for companies to increase their business. The economic importance and power of the United States have been known for quite some time now, but there are also some sleeping giants in the world. Markets like Australia, Brazil and Indonesia contain a lot of possibilities for European companies.

**Henning Heesen**  
**Cross-Border E-Commerce Specialist**  
**and Board Member at Salesupply AG**



# A Brief Introduction to Europe

An Overview of Europe and the European Union



# Overview of the European Countries

## A Brief Introduction to Europe

Country	Capital	VAT	Currency	Population	EU28
Austria	Vienna	20%	Euro (EUR)	8.4mn	EU28
Belgium	Brussels	21%	Euro (EUR)	11.1mn	EU28
Bulgaria	Sofia	20%	Lev (BGN)	7.2mn	EU28
Croatia	Zagreb	25%	Kuna (HTK)	4.2mn	EU28
Cyprus	Nicosia	18%	Euro (EUR)	0.8mn	EU28
Czech Republic	Prague	21%	Koruna (CZK)	4.4mn	EU28
Denmark	Copenhagen	25%	Krone (DKK)	5.6mn	EU28
Estonia	Tallinn	20%	Euro (EUR)	1.3mn	EU28
Finland	Helsinki	24%	Euro (EUR)	5.4mn	EU28
France	Paris	19%	Euro (EUR)	65.5mn	EU28
Germany	Berlin	19%	Euro (EUR)	82.0mn	EU28
Greece	Athens	19%	Euro (EUR)	11.0mn	EU28
Hungary	Budapest	27%	Forint (HUF)	9.9mn	EU28
Ireland	Dublin	23%	Euro (EUR)	4.5mn	EU28
Italy	Rome	22%	Euro (EUR)	59.6mn	EU28
Latvia	Riga	21%	Lats (LVL)	2.0mn	EU28
Lithuania	Vilnius	21%	Litas (LTL)	2.9mn	EU28
Luxembourg	Luxembourg	15%	Euro (EUR)	0.5mn	EU28
Malta	Valletta	18%	Euro (EUR)	0.4mn	EU28
Netherlands	Amsterdam	21%	Euro (EUR)	16.7mn	EU28
Poland	Warsaw	23%	Zloty (PLN)	38.5mn	EU28
Portugal	Lisbon	23%	Euro (EUR)	10.4mn	EU28
Romania	Bucharest	24%	New Leu (RON)	20.0mn	EU28
Slovakia	Bratislava	20%	Euro (EUR)	5.4mn	EU28
Slovenia	Ljubljana	22%	Euro (EUR)	2.0mn	EU28
Spain	Madrid	21%	Euro (EUR)	46.7mn	EU28
Sweden	Stockholm	25%	Krone (SKK)	9.5mn	EU28
United Kingdom	London	20%	Pound (GBP)	63.8mn	EU28

### EU countries

The continent of Europe consists of 47 countries, of which 28 countries are members of the European Union. In the table we provide an overview of the EU members, in alphabetic order. It includes relevant information, such as the currency of each country as well as their respective VAT rates.

### Establishment

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

### Organizations

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

The cooperation between these member states is characterized by far-reaching economic integration. In 1986, the tariffs between member states were abolished, creating one internal market. In addition, 12 member states decided to introduce one common currency (the euro) in 1998, and later on this Eurozone was expanded to 18 countries.

# Overview of the European Countries

## A Brief Introduction to Europe

### Non-EU countries

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



Country	Capital	VAT	Currency	Population	EU28
Albania	Tirana	20%	Lek (ALL)	2.7mn	Candidate
Bosnia & Herzegovina	Sarajevo	17%	Mark (BAM)	3.8mn	Candidate
FYR Macedonia	Skopje	18%	Denar (MKD)	2.0mn	Candidate
Iceland	Reykjavik	25%	Krona (ISK)	0.3mn	Candidate
Kosovo	Pristina	16%	Euro (EUR)	1.8mn	Candidate
Montenegro	Podgorica	19%	Euro (EUR)	0.6mn	Candidate
Serbia	Belgrade	20%	Dinar (RSD)	7.1mn	Candidate
Turkey	Ankara	18%	Lira (TRY)	75.6mn	Candidate
Andorra	Andorra La Vella	9%	Euro (EUR)	76,000	NON-EU28
Belarus	Minsk	20%	Kuna (HTK)	9.4mn	NON-EU28
Liechtenstein	Vaduz	8%	Sw.Franc (CHF)	36,000	NON-EU28
Moldova	Chișinău	20%	Leu (MDL)	3.5mn	NON-EU28
Monaco	Monaco	19%	Euro (EUR)	36.000	NON-EU28
Norway	Oslo	25%	Krone (NKK)	5.0mn	NON-EU28
Russia	Moscow	18%	Ruble (RUB)	143.0mn	NON-EU28
San Marino	San Marino	0%	Euro (EUR)	33,000	NON-EU28
Switzerland	Bern	8%	Sw. Franc (CHF)	8.0mn	NON-EU28
Ukraine	Kiev	20%	Hryvnia (UAH)	45.5mn	NON-EU28
Vatican City	Vatican City	20%	Euro (EUR)	850	NON-EU28

# Impact of E-commerce on the Economy

## A Brief Introduction to Europe

The share of e-commerce in the European GDP was 2.2% in 2013

### Gross Domestic Product

The total Gross Domestic Product (GDP) of Europe is estimated to have reached around €16.4 trillion in 2013, of which the GDP of the EU28 was about 80%. Ecommerce Europe estimates the share of the European Internet economy in the GDP at 2.2%, a percentage that is set to double by 2016 and to triple by 2020.

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

### 645,250 websites

According to data received from national e-commerce associations, Ecommerce Europe estimates the number of B2C websites to have grown to 645,250 at the end of 2013, growing at a pace of 15 to 20% per year.



**2.0 million+**

Number of jobs created by B2C e-commerce sector



**645,250**

Estimated number of active B2C websites



**3.7 billion**

Number of parcels sent in Europe

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

### 3.7 billion parcels sent

Postal and private operators have reaped the fruits of the impressive growth over the past years of (B2C) e-commerce. Ecommerce Europe estimates the annual number of B2C parcels sent to customers domestically and cross-border to other (European) countries at 3.7 billion, a number that will certainly continue to grow as a result of the increase forecast for B2C e-commerce in Europe.

# Global B2C E-commerce in Brief

Highlights of Global E-commerce



# Global 2013 Key B2C E-commerce Data of Goods and Services at a Glance



Asia-Pacific	€ 406.1 bn	+16.7%
North America	€ 333.5 bn	+ 6.0%
Europe	€ 363.1 bn	+16.3%
Latin America	€ 37.9 bn	+24.6%
Africa	€ 2.3 bn	+11.9%
MENA	€ 11.9 bn	+32.6%
Others	€ 18.7 bn	+10.8%

**Global**  
€1,173.5 bn +13.6%

Total B2C e-sales 2013 of goods and services



## Cross-border B2C E-commerce

Most popular countries:

USA	45%
UK	37%
China / HK	26%
Canada	18%
Australia	16%
Germany	14%



€ 76.7 bn

"94 million consumers buy cross-border and this number is expected to grow in 2014"

## Top 10 e-commerce countries in turnover (EUR billion)

USA	€ 315.4
China	€ 247.3*
UK	€ 107.1
Japan	€ 81.3
Germany	€ 63.4
France	€ 51.1
Australia	€ 26.9
Canada	€ 18.0
Russia	€ 15.5
S. Korea	€ 15.2

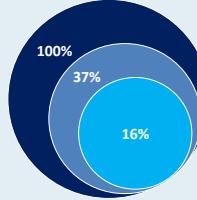
\* B2C & C2C goods & services, excluding insurances



## GOMSEC

Global  
Online  
Measurement  
Standard B2C  
E-Commerce

USA, China, UK account for 57% of total B2C e-commerce sales in the world



7,233 million people live in the world

2,668 million people use the Internet

1,181 million people are e-shoppers

€ 1,173.5 bn  
Turnover E-commerce Goods & Services



Estimated share of online goods in total retail of goods



73.4%

Share of Internet users accessing the web through a mobile device

\*Average worldwide

"1,878 million estimated social media users"



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for reports: [research@ecommerce-europe.eu](mailto:research@ecommerce-europe.eu)

Ecommerce Europe  
Rue de Trèves 59-61 | B-1000 Brussels |  
Belgium  
Tel: +32 (0) 2 502 31 34

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'Global B2C E-commerce report will be published in Fall 2014'

# B2C E-commerce in Europe

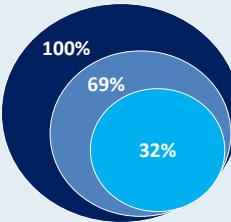
European B2C E-commerce Market of Goods & Services



# Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance

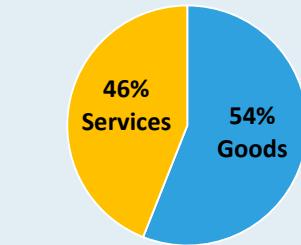


West    € 177.7 bn +12.4%  
 Central    € 93.3 bn +22.7%  
 South    € 40.8 bn +18.9%  
 North    € 31.9 bn +12.7%  
 East    € 19.3 bn +47.3%



**816 million**  
people live in Europe  
**565 million**  
people use the Internet  
**264 million**  
people are e-shoppers

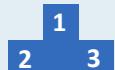
**€ 363.1 bn**  
Turnover E-commerce  
Goods & Services



Europe    € 363.1 bn 16.3%  
 EU28    € 317.9 bn 14.7%



**2.2% eGDP**  
 € 16.4 trn GDP 2013



**2,000+** jobs directly or indirectly via e-commerce

**645,000+** estimated online businesses

**3.7 billion+** number of parcels annually (f)

**UK, Germany, France account for 61% of total e-commerce sales in Europe**



Top 5 mature e-commerce countries in turnover (million)	
UK	€ 107,157
Germany	€ 63,400
France	€ 51,100
Austria	€ 10,970
Netherlands	€ 10,583

Top emerging countries	
Russia	€ 15,500
Spain	€ 14,414
Italy	€ 11,268
Poland	€ 5,225

Average spending per e-shopper  
 € 1,376

**228 million e-households**

5.7%

Estimated share of online goods in total retail of goods



"443 million social media users"

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## Internet penetration

The average **Internet penetration** in Europe increased to **74%** in 2013. As a result, it grew closer to the EU28 average, which now amounts to **77%**.

In the top 10 of European countries in terms of Internet penetration, it is interesting to see that all **Scandinavian countries** are represented in the **top 5**.

## Eastern and Southern Europe

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

However, **Russia** in particular is trying to close the gap. Last year, it significantly increased its Internet penetration, from **48%** in 2012 to **59%** last year.

**TOP 10 COUNTRIES IN TERMS OF INTERNET PENETRATION**  
Internet access and online population, 2013

Countries	Internet access*	Online Population
<b>Europe</b>	<b>74%</b>	<b>600.6mn</b>
<b>EU28</b>	<b>77%</b>	<b>392.7mn</b>
<b>Top 10</b>	<b>93%</b>	<b>239.2.2mn</b>
Norway	<b>96%</b>	4.8mn
Netherlands	<b>95%</b>	15.8mn
Denmark	<b>95%</b>	5.3mn
Sweden	<b>95%</b>	9.1mn
Finland	<b>92%</b>	4.9mn
United Kingdom	<b>91%</b>	57.9mn
Germany	<b>86%</b>	70.5mn
France	<b>84%</b>	55.1mn
Belgium	<b>83%</b>	9.2mn
Switzerland	<b>83%</b>	6.6mn

Sources: Worldbank.org / Eurostat, 2014

\*share of total population

# Internet Penetration

## B2C E-commerce in Europe

**TOP 5 LOWEST INTERNET ACCESS**  
Internet access and online population, 2013

Countries	Internet access*	Online Population
<b>Top 5</b>	<b>53%</b>	<b>157.1mn</b>
Turkey	<b>46%</b>	34.7mn
Ukraine	<b>50%</b>	22.7mn
Romania	<b>55%</b>	11.7mn
Bulgaria	<b>56%</b>	4.0mn
Russia	<b>59%</b>	84.0mn

# Share of Top 10 Countries in B2C E-commerce Sales

## B2C E-commerce in Europe

### E-commerce powers

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

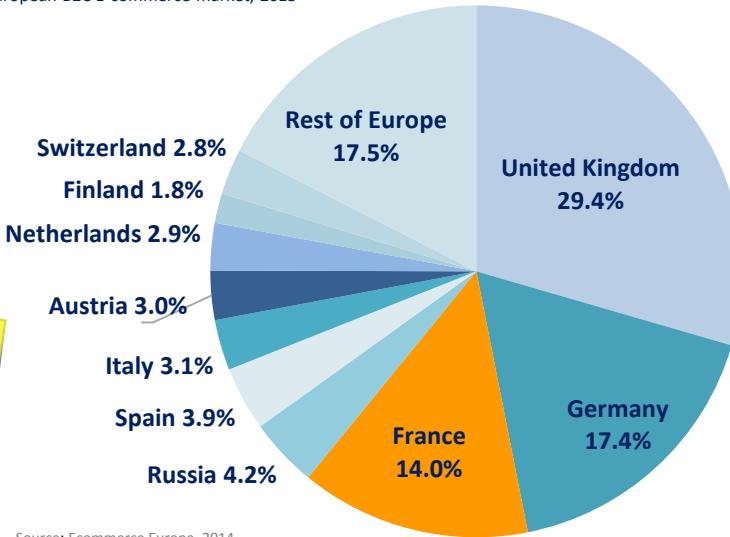
The share of the top 10 countries in the total European B2C e-commerce (**worth of: €363.1bn**) markets is almost **85%**. However, within the top 10 the difference between the top 3 and the rest is quite significant. Together, the UK, Germany and France account for **60.9%**, while the other seven countries combine for **21.6%**.

The differences between the seven smaller markets in the top 10 are almost negligible. The share of number four **Russia** (4.2%) is only 2.4% larger than that of number ten **Finland** (1.8%).

Another interesting aspect of this top 10 is that **every European region is represented**. With three countries each, Western and Central Europe have the most markets in this list. It is followed by Southern Europe (two countries), and Eastern and Northern Europe with one country each.



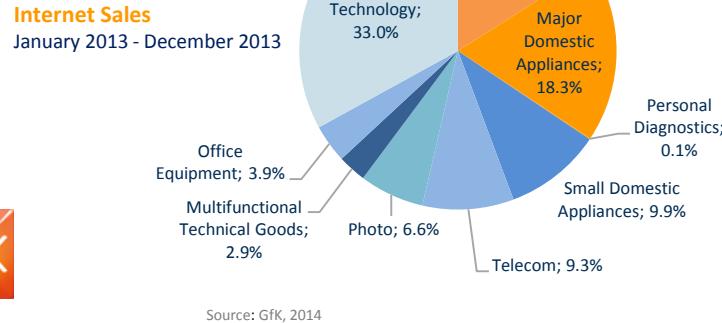
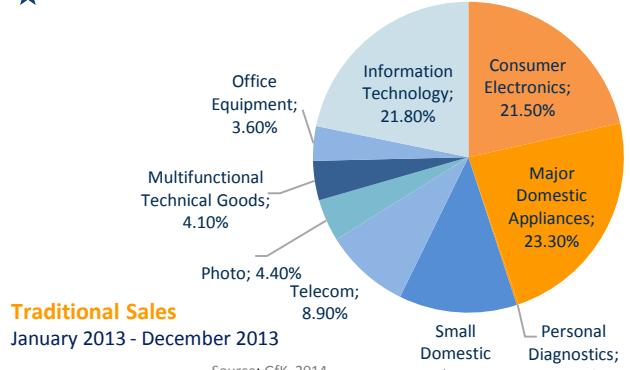
**TOP 10 COUNTRIES SHARE OF EUROPEAN B2C E-COMMERCE MARKET**  
Share of European B2C E-commerce market, 2013



Source: Ecommerce Europe, 2014

# Sales of Popular Technical Consumer Goods

## B2C E-commerce in Europe



### Same top categories

When looking at the two diagrams, it is interesting to see that in both **Traditional Sales** and **Internet Sales** the same three categories were very popular last year. In both ways, people purchased the most in **Information Technology** (such as IT hardware and software), **Consumer Electronics** (such as TVs, audio home systems and Blu-Ray players) and **Major Domestic Appliances** (such as refrigerators, washing machines and dishwashers).

### Different ranking

Still, there is a large difference between the Traditional Sales and Internet Sales and that is the **division of these categories**. When purchasing through the web, consumers purchase most in the Information Technology category (**33.0%**), followed by Major Domestic Appliances (**18.3%**) and Consumer Electronics (**16.0%**). As a result, Information Technology and Consumer Electronics account for **more than half of the total online sales**.

However, in traditional sales, the difference between the three most popular categories is much smaller. At **23.3%**, people purchased most in the Major Domestic Appliances category. Information Technology ranked second with **21.8%**, closely followed by Consumer Electronics (**21.5%**).

# Western Europe

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



# Western Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance



Europe € 363.1 bn +16.3%  
EU 28 € 317.9 bn +14.7%  
Western Europe € 177 bn +12.4%  
Total B2C E-commerce 2013 of goods & services



E-commerce GDP  
**3.45%**  
Total GDP € 5,163 bn

## National e-commerce Associations:



Belgium



France



Ireland



Netherlands



88% of the population has Internet access

## Ranking Western Europe in turnover (EUR million)

1		United Kingdom	€ 107,157
2		France	€ 51,100
3		The Netherlands	€ 10,583
4		Ireland	€ 4,600
5		Belgium	€ 3,820
6		Luxembourg	€ 460

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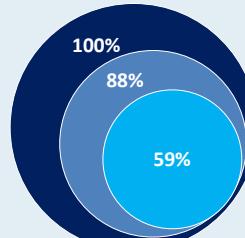
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€ 177.7 bn  
Turnover E-commerce Goods & Services



161 million people live in Western Europe  
142 million people use the Internet  
95 million people are e-shoppers



Estimated share of online goods in total retail of goods

9.5%



Estimated 72% of active Internet users are on social media



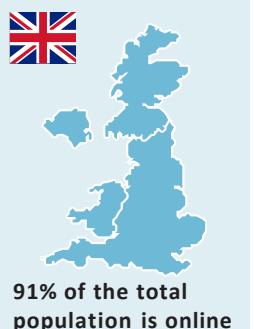
## United Kingdom

The UK is the largest e-commerce market of Europe. In total, the British e-commerce turnover amounted to **€107.1bn** in 2013. This number is forecast to grow by **11.4%** to **€127.4bn** in 2014.

In total, there were about **41 million e-shoppers** in the United Kingdom last year. On average, they each spent **€2,613** in 2013, which makes the British Europe's biggest spenders. This number is also expected to grow, by **14.2%** to **€2,986**.

**Top 3 Online Players UK** These are the three **most important players** on the UK's online market of goods sold to consumers in terms of **market share**. Other big online sellers are Asos, Argos, Play.com, Next and John Lewis.

**Mobile commerce** accounted for nearly **one third** of all online sales in the UK in the fourth quarter of 2013. In addition, about **half of all visits** to British e-retail sites was made through a **smartphone or tablet** during that period.



Average spending per British e-shopper is estimated at  
**€2,614**

E-sales growth  
**11.4%**  
in 2013

63.7 million

£ Pound (GBP)

VAT 20.0%

# E-commerce Markets

## Western Europe

### France

French consumers made more than **600 million transactions online** during 2013, for a total value of **€51.1bn**. With **33.8 million** active e-consumers, this amounts to an **average spending per e-shopper** of **€1,512**.

Despite the **worsening economic climate** in France, **online sales** continued to rise in 2013, albeit less strongly than the years before. Whereas e-commerce grew by **24%** in 2010, its growth rate was only **13.6%** in 2013. This trend is expected to continue since a growth of **12.5%** is forecast for 2014.

In France, the **number of B2C e-commerce sites** is increasing rapidly. In 2013, there were around **138,000** active sites, which represents a growth of **17%** compared to the preceding year.

In general, major **credit cards** are the preferred **e-commerce payment methods** in France. The most popular method is **Carte Bleue** (often linked to Visa), followed by **MasterCard, American Express and PayPal**. **Cheques** are still fairly often used as the French seem to remain quite traditional and slightly anxious to use new online types of payment.



**€51.1bn**  
Online sales in 2013



M-commerce turnover in 2013 in France was

**€6.2bn**

65.6 million

€ Euro (EUR)

VAT 19.6%

# Central Europe

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



# Central Europe

## 2013 Key B2C E-commerce Data of Goods and Services at a Glance

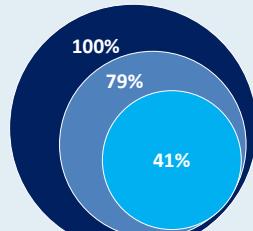
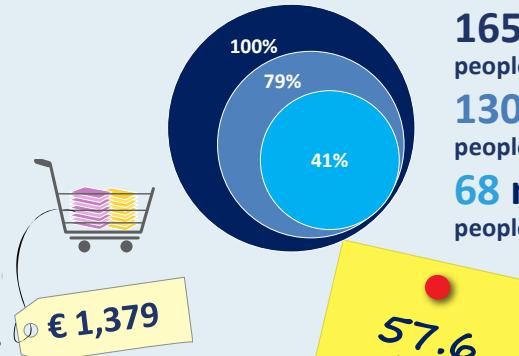


Europe € 363.1 bn +16.3%  
EU 28 € 317.9 bn +14.7%  
Central Europe € 93.3 bn +22.7%  
Total B2C Ecommerce 2013 of goods & services

E-commerce GDP  
**2.20%**  
Total GDP € 4,237 bn



Average spending per e-shopper

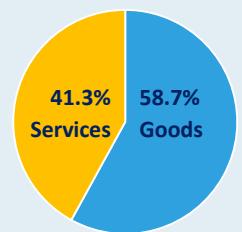


165 million people live in Central Europe

130 million people use the Internet

68 million people are e-shoppers

**€ 93.3 bn**  
Turnover E-commerce Goods & Services



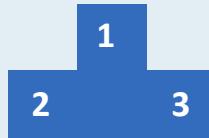
57.6 million e-households

Estimated share of online goods in total retail of goods

7.0%



Estimated 72% of active Internet users are on social media



Ranking Central Europe in turnover (EUR million)

1		Germany	€ 63,400
2		Austria	€ 10,970
3		Switzerland	€ 10,200
4		Poland	€ 5,225
5		Czech Republic	€ 2,160
6		Hungary	€ 810
7		Slovakia	€ 330
8		Slovenia	€ 180

### National e-commerce Associations:

aCommerce Team Austria

APEK Czech republic

e-COMMERCE POLSKA CHAMBER OF DIGITAL ECONOMY Poland

netcomm suisse e-commerce association Switzerland

77.6% of the population has Internet access

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In 2013, Switzerland had **6.67 million Internet users**, which represented a penetration of 83% for a population of eight million people. Between 2009 and 2013, the Swiss B2C e-commerce market almost doubled to reach around **€10.2bn**. The number of **e-shoppers** is estimated at **5.7 million** in 2013 and on average they each spent around **€1,789**.

The most frequently purchased online products in Switzerland were from the categories **Travel and Hotels, Books and Magazines, Fashion, and Digital Media**.

As Switzerland is a **relatively expensive country** and each Swiss region borders a country with the same official language (France, Italy, Germany or Austria), Swiss e-consumers **frequently shop across the border**.

In combination with the Swiss tendency to shop cross-border, the non-EU status of Switzerland (and the relating import and currency issues) restricts the development of the Swiss B2C e-commerce market. After all, it is not appealing for foreign companies or consumers to establish themselves or purchase in Switzerland.

# E-commerce Markets

## Central Europe

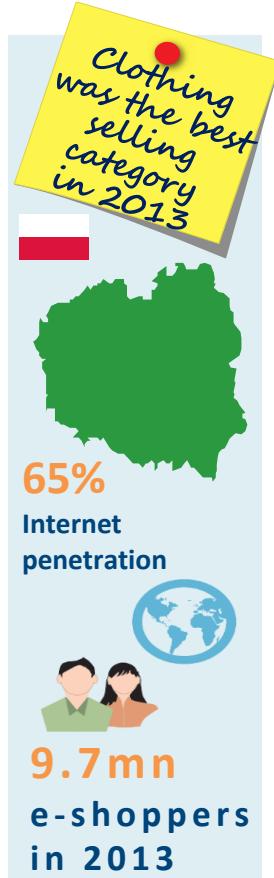
### Poland

The **Polish e-commerce market** is booming. Since 2009 its turnover grew each year with about **25%**, from **€2.5bn** to **€5.2bn** in 2013. For 2014, another large increase is forecast, as this number is expected to reach **€6.2bn**. As a result, Poland is the **fastest growing B2C e-commerce market** within the EU.

Even though **e-commerce turnover** is growing rapidly, Polish consumers are not big online spenders. On average they spent **€535** per e-consumer in 2013, which is well below the European average.

In addition, the **Internet penetration** is quite low compared with other countries in the region. **65%** of the Polish population had access to the Internet in 2013, which is the lowest rate in Central Europe. It is interesting to note that over the past few years, this number has stayed practically the same. For 2014, a slight increase to **66%** is expected.

Even though the number of **mobile subscriptions** decreased from **53.6 million** to **47.6 million** in Poland last year, **m-commerce sales** still increased by **41%**. As a result, the turnover amounted to **€242.2mn** in 2013.



# Southern Europe

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



# Southern Europe

## 2013 Key B2C E-commerce Data of Goods and Services at a Glance



Portugal

Spain

Italy

Greece

Turkey

Europe € 363.1 bn +16.3%

EU 28 € 317.9 bn +14.7%

Southern Europe € 41 bn +18.9%

Total B2C Ecommerce 2013 of goods & services

E-commerce GDP  
1.11%  
Total GDP € 3,671 bn

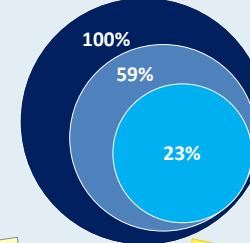
1

2

3

Average spending  
per e-shopper

€ 842



212 million  
people live in Southern Europe

125 million  
people use the Internet

48 million  
people are e-shoppers

€ 40.8 bn  
Turnover E-commerce  
Goods & Services



\* Based on countries: Spain, Italy & Portugal

44.8  
million  
e-households

2.3%

Estimated share of  
online goods in  
total retail of goods



Estimated 72% of active Internet users are  
on social media

### Ranking Southern Europe in turnover (EUR million)

1		Spain	€ 14,414
2		Italy	€ 11,268
3		Turkey	€ 8,930
4		Greece	€ 3,200
5		Portugal	€ 2,600
6		Croatia	€ 240
7		Cyprus	€ 140
8		Malta	€ 25

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65% of the  
population  
has  
Internet  
access

National e-commerce Associations:



Italy



Spain



Greece



## Italy

63%  
of m-shoppers  
is above 35 years

There were about **37.5 million** Italians connected to the Internet in 2013, which resulted in an **Internet penetration** of **61%**. This was the **second-lowest rate** in Southern Europe, with only Turkey scoring lower. For 2014, a penetration of **64%** is forecast.

When we look at the division between **goods and services sold online**, services have become **more popular** in Italy over the last few years. Just like in 2012, the share of e-services in the total Italian B2C e-commerce turnover amounted to **66%**.

**Mobile commerce** is booming in Italy. Of all mobile phone owners, nearly **two thirds** had a smartphone late 2013, which represents an increase of **23.5%** compared to a year before. Also in terms of m-commerce turnover, Italy made a leap forward, with a growth of **37%** to **€694.4mn**.

With regard to **payment methods**, online sellers cannot ignore **CartaSi**, an Italian **credit card**. It is the most frequently used credit card for online purchases in Italy. CartaSi has a market share of 40% and more than **seven million Italians** own such a card.



61.5 million

€ Euro (EUR)

VAT 22.0%



Top 5 companies based on unique visitors

1. Zalando
2. Amazon
3. Euronics
4. IBS
5. Bon Prix



€842

Average spending by Italian e-shoppers in 2013

# E-commerce Markets

## Southern Europe

## Spain

Spain is the **largest e-commerce market in Southern Europe** and the fifth largest in the whole of Europe. Even though its growth rate decreased from **18.8%** to **11.1%**, e-commerce turnover amounted to **€14.4bn**, which represents **more than a third** of Southern Europe's total B2C e-commerce turnover.

In addition, **m-commerce** is really booming in Spain. The m-commerce turnover was **€3.1bn**, which is an increase of **22.7%** in comparison with 2012.

In Spain, **Credit/Debit Cards** were the most popular **payment method** for purchases made online last year. They were followed by **PayPal**, **Cash on Delivery**, **Prepaid Cards** and **Bank Transfers**.

Amazon expanded its Spanish activities this year, by introducing a **clothing store**. It is expected that the American B2C e-commerce giant will be a **fierce competitor** for the current leaders in this industry: Inditex, Privalia and Asos. Amazon already has **six million unique users** in Spain and is known for its **flawless logistics**, one of the shortcomings of Spanish companies.



46.8 million

€ Euro (EUR)

VAT 21.0%



B2C e-commerce turnover in services reached

€8.6 bn

Music, E-books and Apps are the best selling items on mobile devices



Preferred online payment methods:

1. Credit/Debit Cards
2. PayPal (Digital wallet)
3. Cash on Delivery (CoD)
4. Prepaid Card
5. Bank Transfer

# Northern Europe

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



# Northern Europe 2013 Key B2C E-commerce Data of Goods and Services at a glance



Europe € 361.1 bn +16.3%  
EU 28 € 317.9 bn +14.7%  
Northern Europe € 31.9 bn +12.7%  
Total B2C Ecommerce 2013 of goods & services

E-commerce GDP  
**2.37%**  
Total GDP € 1,349 bn

## National e-commerce Associations:



Norway



Denmark



Finland



Finland



Internet Penetration 88%

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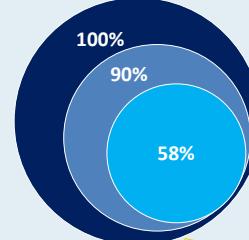


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[www.ecommerce-europe.eu](http://www.ecommerce-europe.eu)

info: [info@ecommerce-europe.eu](mailto:info@ecommerce-europe.eu)  
for reports: [research@ecommerce-europe.eu](mailto:research@ecommerce-europe.eu)

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**32 million**  
people live in Northern Europe

**29 million**  
people use the Internet  
**19 million**  
people are e-shoppers

**€ 35.9 bn**  
Turnover E-commerce Goods & Services



13.3 million e-households

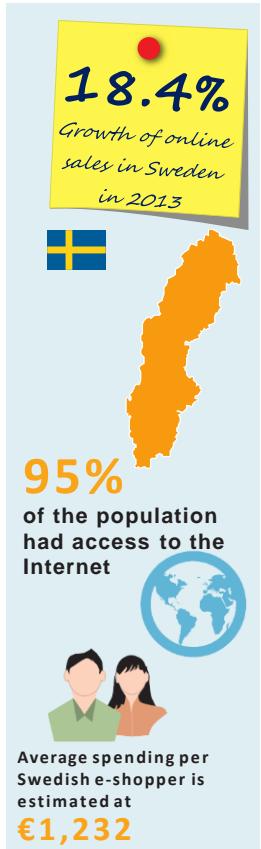


**Estimated share of online goods in total retail of goods**

7.2%



Estimated 18 million social media users



## Sweden

E-commerce is on the rise in Sweden. Compared to 2012, online sales increased by **19.4%** last year. This is partly due to the country's **high Internet penetration** of **95%**. An interesting fact here is that the most active e-shoppers can be found in inland municipalities in the north of Sweden.

An estimated **77%** of Internet users purchased goods and/or services in the last 12 months. On average, each Swedish online consumer spent **€1,232** in 2013, resulting in B2C e-commerce turnover of **€8.6bn** in 2013.

The categories in which goods were purchased online most were **Books and Magazines**, **Home Electronics**, **Fashion/Clothing/Shoes**, **Movies**, and **Music**. In addition, it is interesting to see that Swedes increasingly often buy groceries online. Last year, nearly **€250mn** was spent online on food products, an increase of **38%** compared to 2012.

The potential for **m-commerce** is clearly present in Sweden. **Mobile commerce turnover** increased from **€103.4mn** in 2010 to **€834.3mn** in 2013, which is a growth of more than **700%**. Also for next year a significant increase is expected, as a turnover of **€1.2bn** is forecast.



9.6 million

kr Krona (SEK)



VAT

25.0%

# E-commerce Markets

## Northern Europe

## Denmark

The **average annual online spending** per Danish e-shopper was **€2,145** in 2013. The **amount spent online per e-household** was **€3,768** in that year. In both categories, the Danes were among the **top countries** in Europe.

In Denmark, **89%** of the consumers prefer **card payments** for online purchases. Of these cards, the local **Dankort debit card** is most frequently used. It is popular among the Danes mostly because it is widely accepted in all parts of the country and its associated costs are relatively low.

The most popular category in terms of items sold online in Denmark is **Financial Products and Services**. This is quite striking as it is a category that does not often appear in other countries' lists with items that are best sold online. The other categories comprising the top five are more familiar, i.e. **Travel and Cultural Activities**, **Media and Toys**, **IT, Telecom and Photo**, and **Electronics and Appliances**.

**Mobile commerce** is growing rapidly in Denmark. Compared to 2012, **m-commerce turnover** grew by **36%** to **€499.2mn** last year. For 2014 an increase of **24%** is forecast.



5.6 million

kr Krone (DKK)



VAT

25.0%



Average spending per e-household in Denmark in 2013



Best online selling items in Denmark are:

1. Financial Products and Services
2. Travel and Cultural Activities
3. Film, Music, Books, Games and Toys
4. IT, Telecom and Photo
5. Electronics and Appliances

# Eastern Europe

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



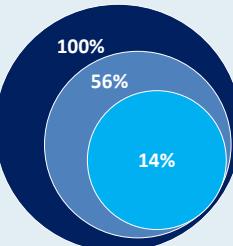
# Eastern Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance



Europe € 363.1 bn +16.3%  
EU 28 € 317 bn +14.7%  
Eastern Europe € 19.3 bn +47.3%  
Total B2C Ecommerce 2013 of goods & services



Average spending per e-shopper



248 million people live in Eastern Europe

139 million people use the Internet

34 million people are e-shoppers

€ 19.3 bn Turnover E-commerce Goods & Services



E-commerce GDP  
0.96 %  
Total GDP € 2,024 bn

1  
2  
3

Ranking Eastern Europe in turnover (EUR million)

1		Russia	€ 15,500
2		Ukraine	€ 1,850
3		Romania	€ 1,040
4		Bulgaria	€ 200
#		Other countries <sup>1</sup>	€ 747

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

2.1%

Estimated share of online goods in total retail of goods



Estimated 40% of active Internet users are on social media

## National e-commerce Associations:



Russia



Ukraine



54.4% of the population has Internet access

In cooperation with:



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# Overview and Forecast

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





# Overview of Online B2C E-commerce Sales Growth

## Overview and Forecast



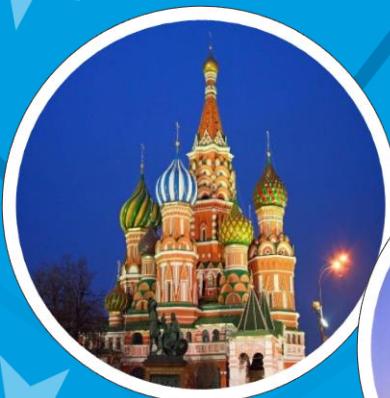
Countries	2010	2011	2012	2013	2014(f)
Russia	29.7%	29.2%	32.7%	50.5%	16.1%
Ukraine	88.1%	45.3%	47.1%	48.0%	21.6%
Turkey	N/A	57.4 %	35.9%	35.0%	12.3%
Romania	30.7%	41.2%	33.3%	30.0%	15.4%
Germany	17.3%	16.7%	21.7%	26.8%	20.6%
Greece	50.0%	50.0%	42.2%	25.0%	18.8%
Poland	24.2%	33.3%	24.9%	24.9%	19.0%
Baltic States	32.1%	36.1%	26.1%	23.3%	13.4%
Ireland	24.6%	25.1%	25.0%	21.1%	15.0%
CZ Republic	27.8%	15.3%	19.6%	20.0%	13.4%
Hungary	30.9%	9.9%	35.5%	20.0%	17.3%
Sweden	13.6%	12.0%	12.5%	19.4%	8.1%
Italy	17.4%	19.2%	18.4%	17.8%	18.2%
Belgium	13.0%	25.0%	38.3%	16.5%	15.0%
Denmark	25.0%	15.0%	18.9%	14.0%	10.9%
France	24.0%	21.6%	19.4%	13.6%	12.5%
Portugal	13.3%	17.7%	15.0%	13.0%	13.0%
Switzerland	23.8%	14.5%	15.5%	12.1%	10.8%
Austria	30.0%	29.2%	16.6%	11.9%	8.2%
United Kingdom	18.0%	15.9%	14.3%	11.4%	18.8%
Spain	17.4%	19.8%	18.8%	11.1%	16.8%
Norway	18.4%	9.4%	8.6%	8.5%	9.4%
Netherlands	10.7%	9.3%	8.6%	8.5%	9.5%
Finland	10.1%	17.5%	2.2%	5.9%	6.1%

Source: Ecommerce Europe, 2014

**OVERVIEW ONLINE B2C  
E-COMMERCE SALES GROWTH 2010 - 2014**  
Based upon online sales growth  
of goods and services, 2013

# Ecommerce Europe and its Reports

Information about Ecommerce Europe and its Reports



# About the Authors

## About Ecommerce Europe



### Bert Nagelvoort, Senior Researcher E-commerce

Bert Nagelvoort (1977) has been working for Ecommerce Europe since 2013. He is involved in international e-commerce and develops the Ecommerce Europe reports. He studied Business Administration at Radboud University Nijmegen and he has a great interest in the international (digital) economy and e-commerce.

Previously, he worked as Project Manager in the financial services industry.

Please feel free to contact Bert at: [bertnagelvoort@ecommerce-europe.eu](mailto:bertnagelvoort@ecommerce-europe.eu)



### Aad Weening, Advisor International E-commerce

Aad Weening (1941) has been involved in distance selling and retail practically all his working life. From 1966 until 1979 he offered legal and economic advice as well as lobbying services.

From 1979 he managed the Dutch Mail Order Association (currently Thuiswinkel.org), at first in the Netherlands and later on at a European level. Between 1993 and 2006 he served as the Secretary General of the European Distance Selling Trade Association (EMOTA). At the moment, Weening is Senior Advisor at Ecommerce Europe.



### Richard van Welie, Editor

Richard van Welie (1979) has been working for Ecommerce Europe as an editor since March 2014. Prior to this, he worked as a freelance translator/copywriter for five of years. One of his main tasks is providing content for the Ecommerce Europe reports.

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



### Jorij Abraham, Director Research & Advice

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

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



### Peter van den Brink, Trainee Research & Advice

Peter van den Brink (1992) has worked for Ecommerce Europe since 2014. He studies Business Management at the University of Applied Sciences in Ede. He is involved in the research of the e-commerce market and is developer of the Ecommerce Europe reports.