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European B2C E-commerce Report 2015

Facts, Figures, Infographics & Trends of 2014 and the 2015 Forecast
of the European B2C E-commerce Market of Goods and Services



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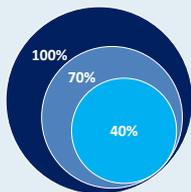
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Ecommerce Europe association data at a glance 2015

West € 208.1 bn +13.3%
 Central € 106.5 bn +12.9%
 South € 47.2 bn +15.4%
 North € 38.4 bn +16.1%
 East € 23.4 bn +24.6%



818 million people live in Europe
 564 million people use the Internet
 331 million people are e-shoppers

Our mission:
 Unlock the potential of cross-border e-commerce in Europe



June 6-8 2016
 Barcelona



European E-commerce Awards
 • Entrepreneurial award
 • Omnichannel award
 • Pure Player award

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

2,475 jobs directly or indirectly via e-commerce

715,000+ estimated online businesses

4.0 bn+ number of parcels sent annually (f)

GOMSEC

Global Online Measurement Standard B2C E-Commerce

Europe EU28
 € 423.8 bn +14.3% € 368.7 bn +13.7%

European Reports

Reports include country profiles, trends & Infographics.

Positioning papers

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

Reports contain countries:

- Eastern: Rom, Rus, Ukr, a.o.
- Western: BeNeLux, 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.

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Companies that want to sell goods and/or services in other countries than their own are often faced with several challenges and burdens. For instance, each country has its own tax, legal and customs regulations in place, complicating cross-border commerce. However, as trading across-border benefits both the industry and consumers, Ecommerce Europe has taken it upon themselves to unlock the potential of cross-border e-commerce and to remove any existing relevant barriers.

Ecommerce Europe strives to accomplish its mission through four focus areas. First of all, we are very active in public affairs. Our research so far has shown us that the biggest hurdles to growth of the cross-border sector are in five key policy areas: Internet Security & Data Protection, Consumer rights, e-Payments, Taxation and e-Logistics. As about 80% of national legislations come from the European Commission in Brussels, Ecommerce Europe tries to remove these hurdles through assisting in the development of the European Commission's new Digital Strategy. Through harmonization of the regulations in the different countries, it becomes easier for companies to sell to other countries.

Second of all, networking is also a very important aspect of Ecommerce Europe's activities. Through several events, such as the round tables that we organize in 10 European capitals, the Ecommerce Europe Annual Conference and the yearly Global E-commerce Summit in Barcelona, Ecommerce Europe is bringing together B2C e-commerce experts from all over the world to talk about the latest developments and challenges. This way we keep abreast of what is happening within the world of e-commerce and learn from each other.

Third of all, we are busy developing a European Trustmark. This trustmark will connect national trustmark schemes on a European level, stimulating cross-border e-commerce as it will build trust among consumers from other countries.

The fourth and final focus area is our research. To this end, Ecommerce Europe founded the Ecommerce Foundation in 2015, in order to foster research, studies and benchmarking on a global scale. This report is the first example of the Foundation's work.

Public affairs and our other activities are more likely to be successful if Ecommerce Europe gathers the right facts & figures. The European B2C E-commerce Report and more than 40 national reports are our most elaborate form of research. They contain facts, figures and trends with regard to e-commerce in the specific regions and its countries, as well as other relevant information. As a result, these reports provide useful insight into e-commerce markets and contain valuable information for companies that want to start cross-border trading in one of these regions or countries. This fall, the Ecommerce Foundation will publish the Global E-commerce Report in cooperation with national e-commerce associations around the globe.

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. Also, a special word of thanks goes to our sponsors GlobalCollect|Ingenico and Informatica Corp, who have enabled us to make our 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 through our website www.ecommerce-europe.eu or send us an email at research@ecommerce-europe.eu.

President of Ecommerce Europe

François Momboisse



Chair of the Executive Committee

Wijnand Jongen



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This report is created with help from the following partners

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

In cooperation with:



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“Convenience decisive for change and success”

E-commerce beyond pure growth

E-commerce has continued to grow across countries and sectors. While in some market segments the growth in online sales has tended to slow down, the importance of touchpoints across diverse channels during the purchase journey has reached an extremely high level (depending on the category more than 60% of shoppers enjoy multichannel purchasing activities). Retail formats that deliver on this complexity will therefore be more successful in the future.

Regarding Internet sales penetration, there is still some divide in Europe. Looking at Technical Consumer Goods, country markets like Great Britain, Germany, the Netherlands, Switzerland, Czech Republic and Ukraine can be considered advanced with shares of more than 20%. On the other hand, the Mediterranean countries show strong growth, coming from a relatively low level of close to, or even below, 10% Internet sales share.

Retail trends

The retail industry is in constant change. According to a recent expert study by GfK, the driver that is currently most influential and is having most impact on the retail scene is **shoppers’ convenience expectation**: a very demanding issue in an increasingly complex retail and shopping environment. One of the keys to achieving a **seamless cross-channel experience** (third most important driver in the future) is **mobile Internet and communication** (most important future driver).

Retail formats of the future

Marketplaces are in good shape. They seem to meet shoppers’ expectations in terms of convenience and offer. The future of those that provide a variety of

hybrid shopping formats, particularly if they are delivering on a mobile shopping experience, looks promising. Those that focus on only one channel are, however, expected to be less successful.

Shoppers

Shoppers are certainly changing, but some aspects of shopping remain the same. People enjoy it as a social activity and this is particularly true for the younger age group. But the social nature of shopping has changed and this must be understood. To an increasing extent it has to do with online socializing.

When identifying a highly attractive future shopper segment – we call them Leading Edge Consumers – the importance of really understanding their needs becomes evident. They expect an even higher level of security for their personal data, but at the same time want websites to track their online behavior and provide individualized offers. This is a challenge for all retailers.

Outlook

The regions of the world are changing at different speeds. Former developing regions have become leaders in some respects – for example, in mobile shopping and payment where Europe is way behind. Retailers need to understand the success factors and the changing needs of individual shopper segments in order to succeed.

Markus Tuschl
Global Director Digital Retail at GfK





“The European Market Changes Constantly”

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

Europe is mostly 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. Especially the Southern and Eastern European regions include several emerging countries. However, the unique dynamics of the European marketplace do require careful consideration and planning.

While selecting the right payment mix per country is part of the necessary basis for cross-border expansion, merchants should also anticipate and act on macro-trends, such as changes in the regulatory environment, in consumer behavior and in expectations, in order to be successful. In addition, they should 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. 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 major trend that further matured in 2014 is the application of big data analytics and visualization in 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).

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 relatively higher.

However, rather than accepting fraud as a cost of doing cross-border business, merchants should 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 was an important year for cross-border payments with the introduction of the Single Euro Payments Area (SEPA). The goal of SEPA is to create a harmonized payments infrastructure throughout the participating countries. This is done through the use of common payment instruments and standards, supported by a regular and accepted legal structure.

David Shell
Vice President, Global Marketing and Communications
at GlobalCollect|Ingenico





“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

A Brief Introduction to Europe

An Overview of Europe and the European Union



E-commerce: a Priority for the European Commission

A Brief Introduction to Europe

E-commerce top priority in the upcoming Digital Single Market strategy

The Juncker Commission, the current European Commission in office and which is due to serve until 2019, has made it a priority to remove obstacles to the completion of the Digital Single Market. One of the three main areas of action agreed by the Commission for its upcoming digital strategy for the next few years is to ensure better access to digital goods and services for consumers and businesses. This means that a unique opportunity presents itself to the e-commerce sector to help sustain its own growth. That is why Ecommerce Europe works together with European policymakers to help them break down remaining barriers. Vice-President Andrus Ansip in particular declared his intention to:

- facilitate cross-border e-commerce, especially for SMEs, with harmonized consumer and contract rules and with more efficient and affordable parcel delivery;
- simplify VAT arrangements to boost the cross-border activities of businesses, and especially SMEs. The cost and complexity of having to deal with foreign tax rules are a major problem for SMEs.

Other related priorities for the European Commission are to tackle geo-blocking, to look into the growing importance of online platforms, and to revisit antitrust investigations, data protection and privacy issues, as well as the use of big data and digital skills.



Andrus Ansip
European Commission Vice-President
for the Digital Single Market

“Let us do away with all those fences and walls that block us online. People must be able to freely go across-borders online just as they do offline. Innovative businesses must be helped to grow across the EU, not remain locked into their home market”

Ecommerce Europe’s key policy areas

Many of the European Commission’s areas of action correspond to Ecommerce Europe’s key policy areas on which the association develops a vision and proposes workable solutions to unlock the potential of cross-border e-commerce in Europe. Ecommerce Europe believes that many obstacles still remain within the following key policy areas:

- Internet Security & Data Protection
 - *More harmonization with room for innovation*
- Consumer Rights
 - *More simplification, self-regulation, and competition*
- E-Payments
 - *More focus on mobile and stimulate innovation*
- Taxation and VAT
 - *Harmonize VAT and expand the Mini-One-Stop Shop*
- E-Logistics
 - *More efficient cross-border parcel delivery*

Breaking Down Barriers to Cross-border E-commerce

A Brief Introduction to Europe

Advocacy and lobbying

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

Strategy

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

Obstacles to cross-border e-commerce

In 2015, Ecommerce Europe launched a European-wide survey on "Barriers to Growth" among the 25,000 online shops it represents. The outcome showed that online merchants with cross-border ambitions are often held back by barriers such as legal uncertainty due to unclear or very different rules, taxation and payment systems that differ greatly, or high prices of delivery due to a lack of transparency in the market. European policymakers are now looking to break down these barriers in order to stimulate further growth of the e-commerce sector. It is up to us to set the agenda and to deliver input for their initiatives.

Solutions proposed by Ecommerce Europe

Ecommerce Europe is *the* one-stop shop for all e-commerce-related matters. Truth be told, not all solutions come from rules and regulations. Ecommerce Europe contributes by developing its own projects, such as a European-wide Trustmark that can generate consumer trust in the cross-border market. Another example is the Ecommerce Europe web platform on e-logistics on which we bring delivery operators and online merchants together to create more transparency in the parcel delivery market.

Besides this, Ecommerce Europe advocates for a level playing field throughout Europe through a smart harmonization of rules such as data protection and privacy, consumer rights and tax administration. In order to create one European market, everyone should ideally have to adhere to the same rules affecting their business.

Marlene ten Ham

Secretary General of Ecommerce Europe

"As more than three quarters of national legislations are determined in the Belgian capital, Ecommerce Europe's Brussels team is at the heart of the European decision-making process. Through advocacy and lobbying, among other things, we strive to unlock the potential of cross-border trading"



European Cross-Border E-commerce Figures

Cross-border B2C E-commerce

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

Overall growth

In 2014, **15%** of all individuals in the EU28 purchased goods and/or services through the Internet from sellers **outside their country of residence**, but within the EU28. This is an increase of **25%** compared to 2013. Popular reasons for shopping abroad were a **more competitive price** or a **wider offer of goods and services available**.

Cross-border EU purchases by individuals were highest in either smaller member states with a limited domestic online offer available, such as **Luxembourg (65%)** and **Malta (39%)**, or in member states with strong regional or linguistic ties to neighboring countries such as **Austria (40%)**, **Finland (36%)**, **Denmark (36%)** and **Belgium (34%)**.

Given the fact that in almost all countries cross-border e-commerce grew significantly last year, it is safe to say that cross-border will be one of the **major drivers** of e-commerce in Europe and around the world.



CROSS-BORDER EU B2C PURCHASES

Percentage of cross-border B2C purchases in EU28 + Iceland and Norway, 2012 - 2014

A Brief Introduction to Europe

Country	2012	2013	2014
EU28	11%	12%	15%
Austria	35%	39%	40%
Belgium	25%	28%	34%
Bulgaria	4%	6%	7%
Croatia	6%	7%	8%
Cyprus	19%	21%	24%
Czech Republic	5%	7%	7%
Denmark	29%	32%	36%
Estonia	11%	13%	22%
Finland	30%	32%	36%
France	17%	18%	21%
Germany	9%	11%	12%
Greece	8%	9%	10%
Hungary	5%	6%	8%
Iceland	24%	24%	31%
Ireland	28%	24%	28%
Italy	5%	7%	9%
Latvia	13%	15%	16%
Lithuania	6%	10%	11%
Luxembourg	60%	64%	65%
Malta	38%	39%	39%
Netherlands	13%	15%	21%
Norway	30%	27%	33%
Poland	2%	3%	4%
Portugal	10%	11%	12%
Romania	1%	1%	1%
Slovakia	17%	17%	20%
Slovenia	13%	15%	17%
Spain	10%	11%	15%
Sweden	19%	23%	22%
United Kingdom	13%	14%	18%

Source: Eurostat, Ecommerce Foundation, 2015

VAT and Online Cross-border Trade in the EU

A Brief Introduction to Europe

An important change took place for companies and entrepreneurs that are located within the European Union and that sell electronic services to consumers from the EU. These parties now have to pay VAT to the country of their customers instead of to the country in which they have their headquarters.

Until the end of 2014, sellers of electronic services, such as software, online courses and apps, had to pay the related VAT to the tax authorities of their own country. As a result, many large companies, including Skype and PayPal, choose Luxembourg as the country for their European headquarters. After all, the Luxembourg VAT regulations are much more favorable than those of most other EU countries.

However, this financial advantage has come to an end. As of the beginning of 2015, EU companies that provide cross-border electronic services to consumers from the European Union will have to pay VAT to the country to which they provide their services.

Mini One-Stop Shop

This alteration entails a large administrative burden for all these companies. They do not only have to determine from which country their customers come, they also have to comply with all the different VAT regulations in the various member states. Naturally, this is against the principle of the Digital Single Market, in which the different rates and regulations among EU28 countries should be harmonized as much as possible.



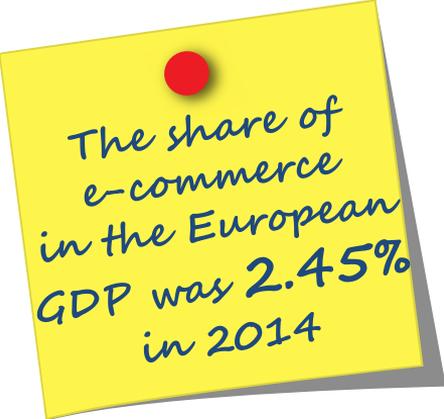
Therefore, in order to ease these burdens as much as possible, the European Commission has installed the Mini One-Stop Shop, or MOSS. Through this scheme, the above-mentioned sellers can determine their one member state in which they want to be registered for all their digital services, will file their VAT applications for all countries and will pay their VAT due.

As Ecommerce Europe promotes cross-border trading as much as possible, it believes that the MOSS initiative for electronic services is a step in the right direction. However, it should be expanded to all goods and/or services sold online so that it will benefit cross-border e-commerce as a whole.

For more elaborate information on the new EU VAT laws, please contact Ecommerce Europe's Brussels office at info@ecommerce-europe.eu or the national e-commerce association from your country.

Impact of E-commerce on the Economy

A Brief Introduction to Europe



The share of e-commerce in the European GDP was 2.45% in 2014

Gross Domestic Product

The total Gross Domestic Product (GDP) of Europe is estimated to have reached around **€17.3 trillion** in 2014, and that of the EU28 amounted to nearly **€14.0 trillion**. Ecommerce Europe estimates the share of the European Internet economy in the GDP at **2.45%**, a percentage that is set to nearly double by 2016 and to nearly triple by 2020.

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

715,000 websites

According to data received from national e-commerce associations, Ecommerce Europe estimates the number of B2C websites to have grown to around **715,000** at the end of 2014, growing at a pace of **1%** to 15% per year.

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

4.0 billion parcels sent

Postal and private operators have reaped the fruits of the impressive growth over the past years of (B2C) e-commerce. Ecommerce Europe estimates the annual number of B2C parcels sent to customers domestically and cross-border to other (European) countries at **4.0 billion**, a number that will certainly continue to grow as a result of the forecast increase for B2C e-commerce in Europe.



2.4 million+

Number of jobs created by B2C e-commerce sector



715,000

Estimated number of active B2C websites



4.0 billion+

Number of parcels sent in Europe

Overview of the European Countries

A Brief Introduction to Europe

Country (EU28)	Capital	VAT	Currency	Population	EU28
Austria	Vienna	20%	Euro (EUR)	8.5mn	EU28
Belgium	Brussels	21%	Euro (EUR)	11.2mn	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)	10.5mn	EU28
Denmark	Copenhagen	25%	Krone (DDK)	5.6mn	EU28
Estonia	Tallinn	20%	Euro (EUR)	1.3mn	EU28
Finland	Helsinki	24%	Euro (EUR)	5.4mn	EU28
France	Paris	19%	Euro (EUR)	65.8mn	EU28
Germany	Berlin	19%	Euro (EUR)	80.7mn	EU28
Greece	Athens	19%	Euro (EUR)	11.0mn	EU28
Hungary	Budapest	27%	Forint (HUF)	9.9mn	EU28
Ireland	Dublin	23%	Euro (EUR)	4.6mn	EU28
Italy	Rome	22%	Euro (EUR)	60.7mn	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)	16.8mn	EU28
Poland	Warsaw	23%	Zloty (PLN)	38.5mn	EU28
Portugal	Lisbon	23%	Euro (EUR)	10.4mn	EU28
Romania	Bucharest	24%	New Leu (RON)	19.9mn	EU28
Slovakia	Bratislava	20%	Euro (EUR)	5.4mn	EU28
Slovenia	Ljubljana	22%	Euro (EUR)	2.0mn	EU28
Spain	Madrid	21%	Euro (EUR)	46.5mn	EU28
Sweden	Stockholm	25%	Krone (SKK)	9.6mn	EU28
United Kingdom	London	20%	Pound (GBP)	64.3mn	EU28

Source: Worldbank, IMF, Ecommerce Foundation, 2015

EU countries

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

Establishment

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

Organizations

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

The cooperation between these 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 19 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. Bosnia & Herzegovina and Kosovo are so-called Potential Candidates, while Albania, 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 (Non-EU28)	Capital	VAT	Currency	Population	EU28
Albania	Tirana	20%	Lek (ALL)	2.9mn	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 (YTL)	76.6mn	Candidate
Andorra	Andorra La Vella	9%	Euro (EUR)	79,000	NON-EU28
Belarus	Minsk	20%	Kuna (HTK)	9.4mn	NON-EU28
Liechtenstein	Vaduz	8%	Sw. Franc (CHF)	37,000	NON-EU28
Moldova	Chişinău	20%	Leu (MDL)	3.5mn	NON-EU28
Monaco	Monaco	19%	Euro (EUR)	37,000	NON-EU28
Norway	Oslo	25%	Krone (NKK)	5.1mn	NON-EU28
Russia	Moscow	18%	Ruble (RUB)	143.7mn	NON-EU28
San Marino	San Marino	0%	Euro (EUR)	33,000	NON-EU28
Switzerland	Bern	8%	Sw. Franc (CHF)	8.1mn	NON-EU28
Ukraine	Kiev	20%	Hryvnia (UAH)	45.2mn	NON-EU28
Vatican City	Vatican City	20%	Euro (EUR)	850	NON-EU28

Source: Worldbank, IMF, Ecommerce Foundation, 2015

Global B2C E-commerce in Brief

Highlights of Global E-commerce



Commissioned by:



www.ecommerce-europe.eu

More elaborate information on global e-commerce can be found in our Global Reports, which will be published in the fall of 2015.

Executed by:



www.ecommercefoundation.org

*Not all final figures included, to be published in September 2015



Asia-Pacific	€ 580 bn	+44%
North America	€ 394 bn	+12%
Europe	€ 424 bn	+14%
Latin America	€ 29 bn	+17%
Africa	€ 3 bn	+11%
MENA	€ 16 bn	+22%
Others	€ 19 bn	+24%

Global

€1,462 bn +24%

Total B2C E-sales 2014 of goods and services



Cross-border B2C E-commerce

Most popular countries:

 USA	47%
 UK	38%
 China / HK	31%
 Canada	17%
 Australia	16%
 Germany	13%



€ 84 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)

	China	€ 405
	USA	€ 363
	UK	€ 127
	Japan	€ 102
	Germany	€ 71
	France	€ 57
	Canada	€ 21
	Russia	€ 18
	S. Korea	€ 17
	Australia	€ 16



* B2C & C2C goods & services, excluding insurances

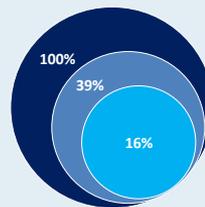
GOMSEC

Global
Online
Measurement
Standard B2C
E-Commerce

Average spending per E-shopper



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



7,360 million people live in the world
2,870 million people use the Internet
1,200 million people are e-shoppers

Forecast 2015
€ 1,760 bn
Turnover E-commerce Goods & Services

Estimated share of online goods in total retail of goods

4.2%



69.4%

Share of Internet users accessing the web through a mobile device

*Average worldwide



"1,878 million estimated social media users"

© Ecommerce Foundation April 2015
(Final figures will be published in September 2015)

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for reports: info@Ecommercefoundation.org

Twitter: @eComFound

Free download at:
<https://www.ecommerce-europe.eu/facts-figures/free-downloads>

'Global B2C E-commerce report will be published in Fall 2015'

Global B2C E-commerce in Brief

Global B2C E-commerce

Population

In 2014, the **global population** amounted to around **7,360 million**, and **1,200 million** people purchased goods and/or services online at least once. In total, they spent **€1,442bn**, which results in an average spending per e-shopper of **€1,100**.

Asia-Pacific strongest B2C e-commerce region in the world

Just like in 2013, **Asia-Pacific** was the strongest B2C e-commerce region in the world last year. With a B2C e-commerce turnover of **€581bn**, it ranks ahead of **Europe** (**€424bn**) and **North America** (**€394bn**).

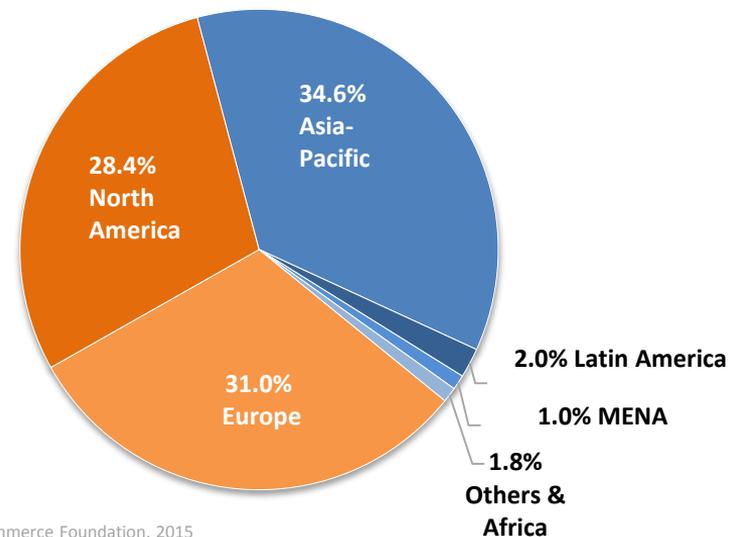
Latin America, Middle East and North Africa (MENA) and **Africa** were the smallest B2C e-commerce markets in 2014. They achieved B2C e-commerce sales of **€29bn**, **€16bn** and **€3bn**, respectively. However, especially MENA and Latin America are **real emerging regions**, which means that they will achieve **high growth rates** over the next few years.

China surpassed the **United States of America** as the strongest country in terms of B2C e-commerce turnover last year. With **€405bn**, it ranks above the **US** (**€363bn**) and the **UK** (**€127bn**). However, it has to be noted that China's figures include **C2C**, as part of it is turnover of rural SMEs, registered as C2C through "consumer accounts" at popular market places. Together, these three countries account for **62%** of the total global B2C e-commerce turnover.

* B2C & C2C goods & services, excluding insurances

OVERVIEW GLOBAL B2C E-COMMERCE

Share of regions in global B2C e-commerce, 2014



Source: Ecommerce Foundation, 2015

Global B2C E-commerce Reports

Global B2C E-commerce



Global Reports

The previous slides offer some insight into the global e-commerce market. More detailed information can be found in our overall **Global B2C E-commerce Report** and the more detailed regional reports covering **Asia-Pacific**, **North America** and **Latin America**.

These reports will be published through www.ecommerce-europe.eu in the **fall of 2015**.



B2C E-commerce in Europe

European B2C E-commerce Market of Goods & Services



Internet penetration

The average **Internet penetration** in Europe increased to **75.0%** in 2014. As a result, it grew closer to the EU28 average, which amounted to **77.1%** last year.

In the top 12 of European countries in terms of Internet penetration, it is interesting to see that all **Scandinavian countries** are represented in the **top 7**.

Eastern and Southern Europe

While this top 12 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**.

TOP 12 COUNTRIES IN TERMS OF INTERNET PENETRATION

Internet access and online population, 2014

Countries	Internet access*	Online population
Europe	75.0%	564.0mn
EU28	77.1%	396.4mn
Top 12	92.1%	244.0mn
Iceland	96.5%	0.3mn
Norway	96.1%	4.9mn
Netherlands	96.1%	16.2mn
Denmark	96.0%	5.4mn
Sweden	95.4%	9.2mn
Luxembourg	95.0%	0.5mn
Finland	94.0%	5.1mn
United Kingdom	92.0%	59.2mn
Switzerland	88.0%	7.2mn
Germany	86.8%	70.1mn
France	85.7%	56.4mn
Belgium	84.7%	9.5mn

Sources: Worldbank.org / Eurostat, 2015

*share of total population

Internet Penetration

B2C E-commerce in Europe

TOP 5 LOWEST INTERNET ACCESS

Internet access and online population, 2014

Countries	Internet access*	Online population
Top 5	50.6%	154.4mn
Ukraine	37.9%	17.1mn
Turkey	46.6%	35.7mn
Romania	51.7%	10.3mn
Greece	57.8%	6.3mn
Russia	59.2%	85.0mn

Share of Top 12 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 more than twice as much as all the other countries outside the top 12 combined.

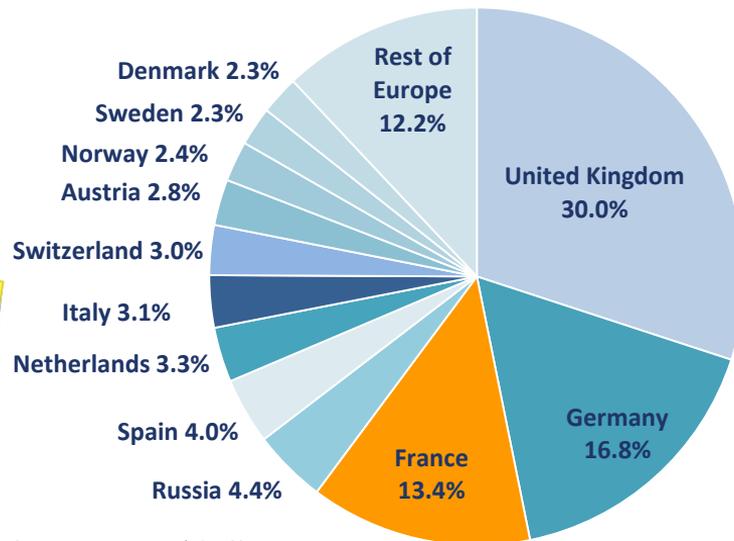
The share of the top 12 countries in the total European B2C e-commerce (**€372.7bn**) markets is almost **90%**. However, within the top 12 the difference between the top 3 and the rest is also significant. Together, the **UK**, **Germany** and **France** account for **60.2%**, while the other nine countries combine for **27.6%**.

The differences between the nine smaller markets in the top 12 are almost negligible. The share of number four **Russia** (4.4%) is only 2.1% larger than that of number twelve **Denmark** (2.3%).

The UK, Germany and France together account for about 60% of the European B2C e-commerce market

TOP 12 COUNTRIES SHARE OF EUROPEAN B2C E-COMMERCE MARKET

Share of European B2C e-commerce market, 2014



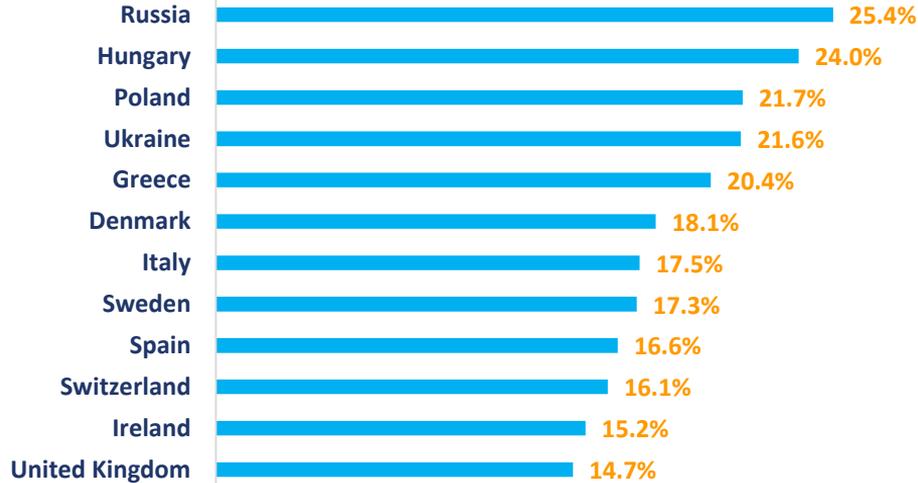
Source: Ecommerce Foundation, 2015

B2C E-commerce Growth Rate per Country

B2C E-commerce in Europe

TOP 12 COUNTRIES IN TERMS OF B2C E-COMMERCE GROWTH RATE

B2C e-commerce growth rate, 2014



Source: Ecommerce Foundation, 2015

Russia on the rise

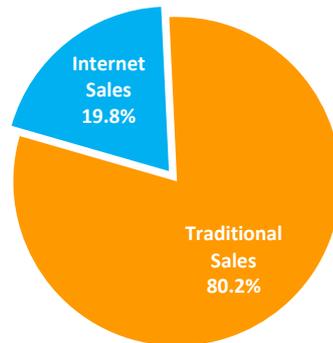
Of all the countries covered in our report, **Russia** was the fastest riser in 2014, as it established a growth rate of **25.4%**. This is significantly higher than the growth rates of the top 3 countries in terms of B2C e-commerce turnover (**UK**, **Germany** and **France**), which indicates that the fourth-ranked Russian market is slowly but surely closing the still quite large gap.

Online and Offline Sales of Technical Consumer Goods

B2C E-commerce in Europe

Technical consumer goods sales

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

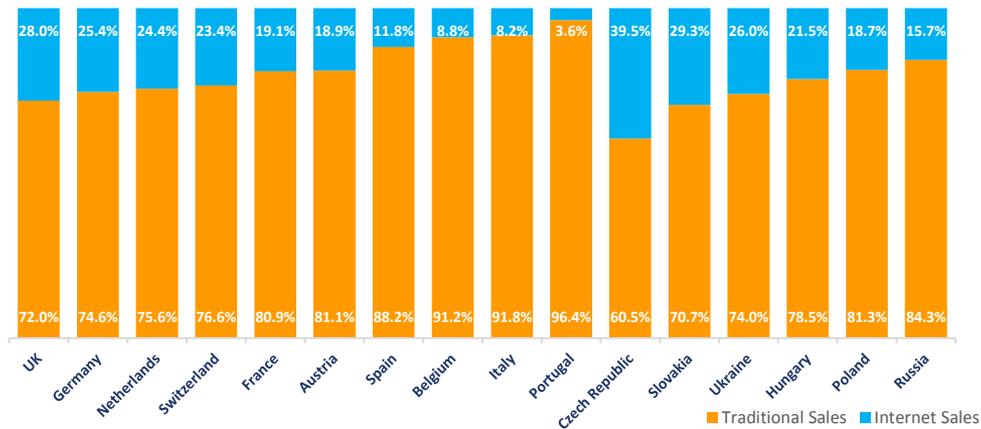


TECHNICAL CONSUMER GOODS B2C CHANNELS
JAN 14 – DEC 14

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

WESTERN EUROPE & EUROPEAN EUROPE CONSUMER CHANNELS

Sales Value %, Jan 14 – Dec 14



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

* Austria, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Russia, Slovakia, Spain, Switzerland, UK and Ukraine



Sales of Popular Fashion Goods

B2C E-commerce in Europe

Fashion categories

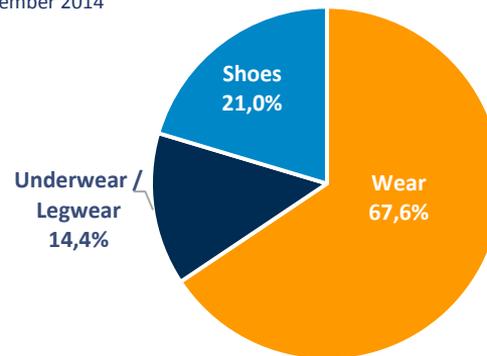
With regard to **fashion categories**, there was not much difference between online and offline purchases in 2014. In both cases, **Womenswear and Menswear** was by far the most popular, with more than **two thirds** of fashion purchases coming from this category.

The main difference can be found in the **Underwear/Legwear** category. In the countries mentioned below, consumers turned to physical stores slightly more often for items from this category.



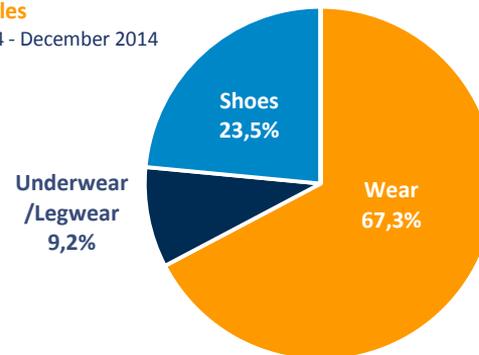
Traditional Sales

January 2014 - December 2014



Internet Sales

January 2014 - December 2014



Western Europe

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





Europe € 423.8 bn +14.3%

EU 28 € 368.7 bn +13.7%

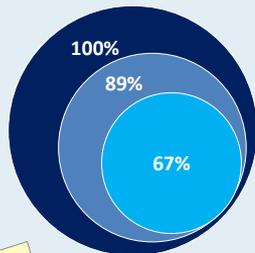
Western Europe € 208.1 bn +13.3%

Total B2C E-commerce 2014 of goods & services



Average spending per E-shopper

€ 1,892



63.1 million E-households

163 million people live in Western Europe

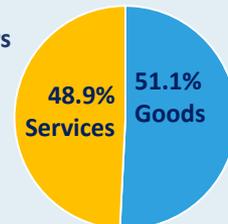
145 million people use the Internet

110 million people are e-shoppers

Forecast 2015

€ 233 bn

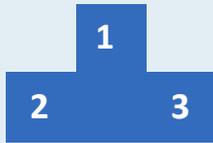
Turnover E-commerce Goods & Services



E-commerce GDP

3.69%

Total GDP € 5,636 bn



Ranking Western Europe in turnover (EUR million)

- United Kingdom € 127,200
- France € 56,800
- The Netherlands € 14,000
- Ireland € 5,300
- Belgium € 4,400
- Luxembourg € 531



Estimated 51% of the total population is on social media



Estimated share of online goods in total retail of goods

National e-commerce Associations:

be commerce.be

Belgium



France



Ireland



thuiswinkel.org

Netherlands



89% of the population has Internet access

Executed by:



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B2C E-commerce Turnover and Growth

Western Europe

Western Europe

In 2014, the total **Western European B2C e-commerce turnover** reached **€208.1bn**, which represented a growth of **13.3%** compared to 2013. The **UK (€127.1bn)** was the largest e-commerce market in Western Europe, and it is expected to increase its lead over the next year. With a forecast growth rate of **13.1%**, it will be the fastest-growing Western European country in terms of e-commerce. The second-largest e-commerce market within this region, **France (€56.9bn)**, is expected to grow by **9.9%** in 2015, joining **the Netherlands (8.1%)** as the Western European countries with **single-digit growth** rates next year.



13.3%

Growth of Western
Europe's B2C
e-commerce in 2014

WESTERN EUROPEAN B2C E-COMMERCE TURNOVER, 2010 - 2015

Countries	2010	2011	Growth	2012	Growth	2013	Growth	2014	Growth	2015 (f)	Growth
Belgium	€1,760mn	€2,200mn	25.0%	€3,040mn	38.2%	€3,820mn	25.7%	€4,368mn	14.3%	€4,900mn	12.1%
France	€31,000mn	€37,700mn	21.6%	€45,000mn	19.4%	€51,100mn	13.6%	€56,800mn	11.2%	€62,400mn	9.9%
Ireland	€2,430mn	€3,040mn	25.1%	€3,800mn	25.0%	€4,600mn	21.1%	€5,300mn	15.2%	€5,900mn	11.3%
Luxembourg	€250mn	€320mn	28.0%	€400mn	25.0%	€460mn	15.0%	€531mn	15.4%	€600mn	13.0%
Netherlands	€9,989mn	€10,927mn	9.4%	€11,869mn	8.6%	€12,877mn	8.5%	€13,961mn	8.4%	€15,100mn	8.1%
UK	€72,515mn	€84,107mn	16.0%	€97,193mn	15.6%	€110,890mn	14.1%	€127,190mn	14.7%	€143,899mn	13.1%
Total	€117,944mn	€138,294mn	20.8%	€161,302mn	22.0%	€183,747mn	16.3%	€208,150mn	13.3%	€232,799mn	11.3%

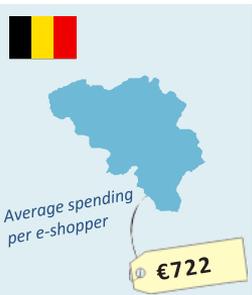
Belgium

Belgian e-commerce has been rising steadily these past few years. In 2014, there were **6.0 million e-shoppers** in Belgium. On average they each spent about **€722** online that year, which amounts to a total B2C e-commerce turnover of **€4.3bn**. This represents an increase of **14.3%** in comparison with 2013.

Since Belgium was quite late in embracing e-commerce, Belgian consumers had to turn to online merchants in neighboring countries. As a result of this, **cross-border sales** from the Netherlands, Germany and France to Belgium were quite significant.

One of the main reasons for this is a **Belgian law which prohibits people from working at night**. As a result, online shops cannot perform any activities over night, which means that delivery times are longer. Therefore, Belgian consumers often turn to online shops from neighboring countries. However, there are plans to abolish this law in 2015, which would definitely **benefit Belgian online shops**.

Another obstacle for Belgian online shops is the fact that the country is practically divided into two parts, **Flanders** and **Wallonia**, each with their own language and culture. As a result, it is very difficult for online merchants to reach the entire country, limiting their market.



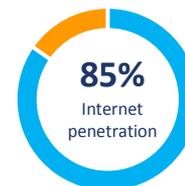
- Best online selling categories in Belgium are:
1. Clothing & Accessories
 2. Home Decor
 3. Multimedia & Hardware
 4. Toys
 5. Kitchen Appliances

11.2 million

€ Euro (EUR)

21.0%

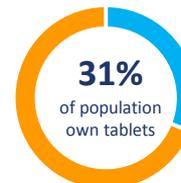
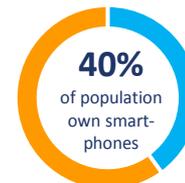
E-commerce basics



The Shopper



The M-commerce Revolution



Ireland

Irish e-commerce turnover continued to rise steadily over the last few years. From 2009 to 2013, it grew by **more than 20%** each year. In 2014, the growth rate decreased somewhat, but still an increase of **15.2%** was achieved.

Ireland had an **Internet penetration** of **82%** in 2014. In other words, **3.7 million** people were connected to the Internet. In addition, **57%** of the total population bought goods and/or services online, which equaled **2.6 million** Irish e-shoppers.

On average, Irish e-consumers each spent **€2,020** in 2014, with which the country ranked sixth within Europe in terms of average spending per e-shopper last year.

Ireland was voted the world's **most entrepreneurial country** by the Wall Street Journal. Due to the very attractive corporate tax rate, many important IT companies, such as Apple, Facebook, Google and Amazon, have established their European headquarters on the island.



€5.3bn

E-commerce sales in 2014

15.2%

E-commerce growth in 2014



3.0%

E-commerce share in Irish GDP



4.6 million

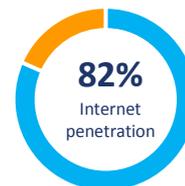


Euro (EUR)

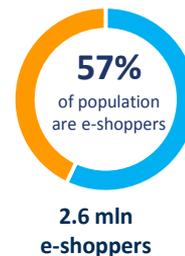


23.0%

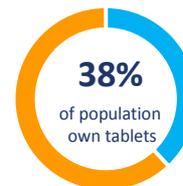
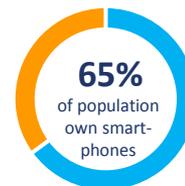
E-commerce basics



The Shopper



The M-commerce Revolution



Central Europe

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



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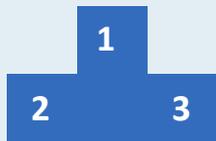
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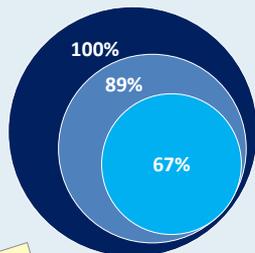
Europe € 423.8 bn +14.3%
 EU 28 € 368.7 bn +13.7%
 Central Europe € 106.5 bn +12.9%
 Total B2C Ecommerce 2014 of goods & services



Ranking Western Europe in turnover (EUR million)

1		Germany	€ 71,200
2		Switzerland	€ 12,717
3		Austria	€ 11,685
4		Poland	€ 6,541
5		Czech Republic	€ 2,874
6		Hungary	€ 930
7		Slovakia	€ 402
8		Slovenia	€ 216

79% of the population has Internet access



163 million people live in Central Europe
145 million people use the Internet
110 million people are e-shoppers

Forecast 2015
€ 119 bn Turnover E-commerce Goods & Services



57.3 million e-households

Estimated 51% of the total population is on social media

7.1% Estimated share of online goods in total retail of goods

National e-commerce Associations:

- Czech republic
- Germany
- Poland
- Switzerland

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Austria

A little over **seven million** people used the Internet in Austria, which equals a penetration of **84%**. This is the third-highest Internet penetration rate within Central Europe.

In 2014, 4.9 million Austrians bought goods and/or services online for an estimated amount of **€11.6bn**. As a result, Austrian online shoppers were among the **biggest spenders** in Europe (**€2,361** per e-shopper). They ranked third within Europe in this regard, just behind the **UK** and **Norway**.

Austria is especially attractive to **German B2C e-commerce companies**, due to the low-threshold language barrier. As a result, the German market attracts many e-shoppers from Austria. In any case, Austrian online shoppers frequently purchase cross-border. In 2014, more than **80%** of them bought goods and/or services abroad at least once.

€2,361 Average spending per e-shopper

€11.6bn
E-commerce sales in 2014

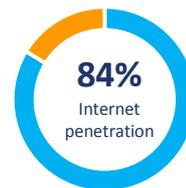
8.0%
E-commerce growth in 2014

8.5 million

€ Euro (EUR)

VAT 20.0%

E-commerce basics



The Shopper

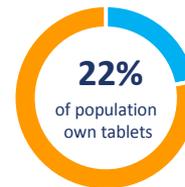
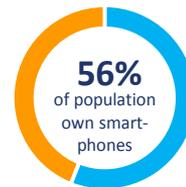


5.0 mln e-shoppers

2.4 mln unserved consumers

2.0 mln cross-border e-shoppers

The M-commerce Revolution



Southern Europe

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



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Portugal

Spain

Italy

Greece

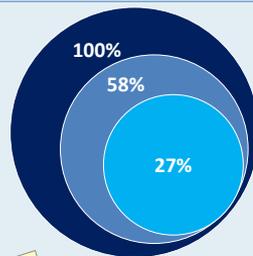
Turkey

Europe € 423.8 bn +14.3%

EU 28 € 368.7 bn +13.7%

Southern Europe € 47.2 bn +15.4%

Total B2C Ecommerce 2014 of goods & services



211 million people live in Southern Europe

123 million people use the Internet

58 million people are e-shoppers

Forecast 2015

€ 54 bn

Turnover E-commerce Goods & Services



Average spending per e-shopper € 818

44.1 million e-house holds

Ranking Southern Europe in turnover (EUR million)

1		Spain	€ 16,900
2		Italy	€ 13,278
3		Turkey	€ 9,800
4		Greece	€ 3,850
5		Portugal	€ 2,945
6		Croatia	€ 280
7		Cyprus	€ 170
8		Malta	€ 28

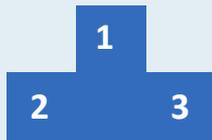


Estimated 46% of the total population is on social media



Estimated share of online goods in total retail of goods

E-commerce GDP 1.25%
Total GDP € 3,782 bn



National e-commerce Associations:

Italy

Spain

Greece

63% of the population has Internet access

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Portugal

In 2014, Portugal had about **10.4 million inhabitants**. Of these people **6.9 million** were connected to the Internet, which equaled an **Internet penetration rate** of **66%**.

In total, **3.2 million Portuguese consumers** bought **goods and/or services** online last year. In total, they spent **€2.9bn** online, which resulted in an **average spending per e-shopper** of **€911**. This is a little less than the European average of **€966**.

With regard to **ease of doing business**, Portugal is ranked at the top of the Southern European region. From a global perspective, the country can be found at the **25th position**. According to the study by the **World Bank Group**, Portugal is especially scoring well in the areas of **starting a business** and **resolving insolvency**.

In terms of unique visitors per months, **Zalando** is the **largest B2C e-commerce** site in Portugal. It is followed by **Amazon**, **Euronics**, **IBS** and **BonPrix**. Other popular e-commerce sites in Portugal are **Yoox** and Portuguese online stores **Salsa** and **Parfois**.

€2.9bn
E-commerce sales in 2014

13.3%
E-commerce growth in 2014

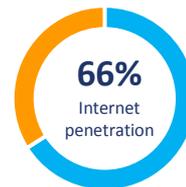
€911
Average spending per e-shopper

10.4 million
Population

€ Euro (EUR)

VAT 23.0%

E-commerce basics



The Shopper

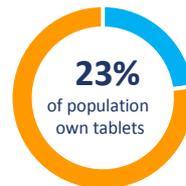
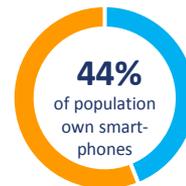


3.2 mln
e-shoppers

5.5 mln
unserved consumers

0.4 mln
cross-border e-shoppers

The M-commerce Revolution

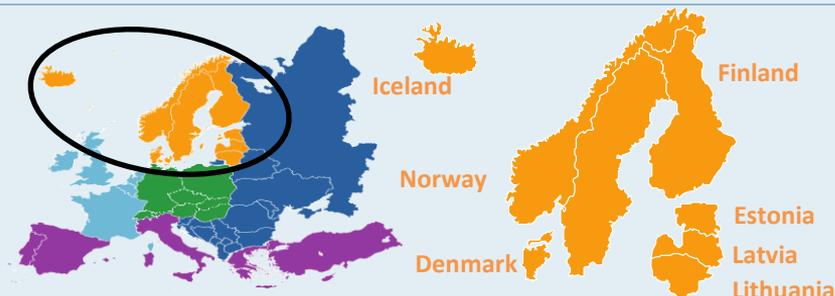


Northern Europe

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



Northern Europe Key B2C E-commerce Data of Goods and Services at a Glance 2014

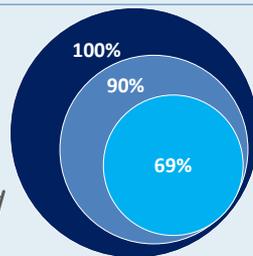


Europe € 423.8 bn +14.3%

EU 28 € 368.7 bn +13.7%

Northern Europe € 38.4 bn +16.1%

Total B2C Ecommerce 2014 of goods & services



32 million people live in Northern Europe

29 million people use the Internet

22 million people are E-shoppers

Forecast 2015

€ 43.7 bn

Turnover E-commerce Goods & Services



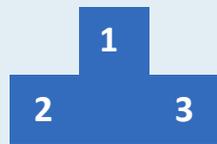
€ 1,755

Average spending per e-shopper

14.3 million e-households

Ranking Northern Europe in turnover (EUR million)

- | | | | |
|----|--|-----------|----------|
| 1. | | Norway | € 10,300 |
| 2. | | Sweden | € 9,938 |
| 3. | | Denmark | € 9,886 |
| 4. | | Finland | € 7,290 |
| 5. | | Lithuania | € 410 |
| 6. | | Iceland | € 250 |
| 7. | | Latvia | € 200 |
| 8. | | Estonia | € 150 |



Estimated 50% of the total population is on social media



Estimated share of online goods in total retail of goods

88% of the population has Internet access

National e-commerce Associations:

VIRKE eHANDEL Norway

FDIH STYRKER DANSK E-HANDEL Denmark

FINNISH COMMERCE FEDERATION Finland

VERKKOTEOLLISUUS Finland

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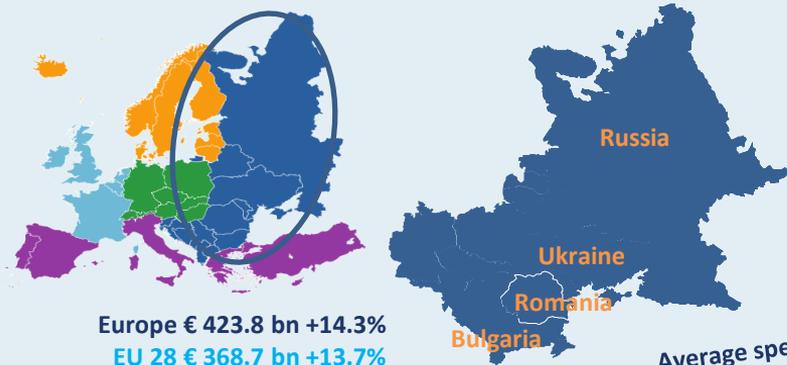
Eastern Europe

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

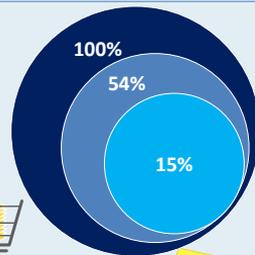


Eastern Europe

Key B2C E-commerce Data of Goods and Services at a Glance 2014



Europe € 423.8 bn +14.3%
 EU 28 € 368.7 bn +13.7%
 Eastern Europe € 23.4 bn +24.6%
 Total B2C Ecommerce 2014 of goods & services



247 million
 people live in Eastern Europe
134 million
 people use the Internet
39 million
 people are e-shoppers

Forecast 2015
€ 28 bn
 Turnover E-commerce
 Goods & Services



Average spending
 per E-shopper



Ranking Eastern Europe in turnover (EUR million)

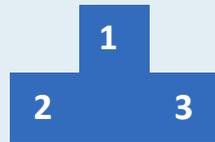
- | | | | |
|---|--|------------------------------|----------|
| 1 | | Russia | € 18,800 |
| 2 | | Ukraine | € 2,250 |
| 3 | | Romania | € 1,200 |
| 4 | | Bulgaria | € 254 |
| # | | Other countries ¹ | € 950 |

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

Estimated 37% of the population is on social media

1.8% Estimated share of
 online goods in
 total retail of goods

E-commerce GDP
1.17 %
 Total GDP € 1,997 bn



National e-commerce Associations:



Russia



Ukraine



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Eastern Europe

The total **B2C e-commerce turnover** of the **Eastern European countries** is still relatively small, but rising rapidly. In 2014, e-commerce sales of this region's markets of this region amounted to **€23.4bn**, a growth of **24.6%** compared to 2013.

Russia is clearly the leading country in this region with an e-commerce turnover of **€18.8bn**, followed by Ukraine (**€2.2bn**) and Romania (**€1.2bn**). It is interesting to see that all Eastern European e-commerce markets are increasing increased by more than **15%** last year.



25.0%

Growth of Eastern
Europe's B2C
e-commerce in 2014

EASTERN EUROPEAN B2C ECOMMERCE TURNOVER, 2010 - 2015

Countries	2010	2011	Growth	2012	Growth	2013	Growth	2014	Growth	2015(f)	Growth
Bulgaria	€100mn	€120mn	20.0%	€150mn	25.0%	€195mn	30.0%	€254mn	30.3%	€300mn	18.1%
Russia	€6,011mn	€7,764mn	29.2%	€10,302mn	32.7%	€14,990mn	45.5%	€18,800mn	25.4%	€23,000mn	22.3%
Ukraine	€585mn	€850mn	45.3%	€1,250mn	47.1%	€1,850mn	48.0%	€2,250mn	21.6%	€3,037mn	35.0%
Romania	€425mn	€600mn	41.2%	€800mn	33.3%	€1,040mn	30.0%	€1,200mn	15.4%	€1,300mn	8.3%
Others	€372mn	€495mn	32.6%	€615mn	22.4%	€747mn	21.1%	€950mn	32.2%	€1,098mn	18.0%
Total	€7,493mn	€9,829mn	33.6%	€13,117mn	32.1%	€18,822mn	34.9%	€23,454mn	25.0%	€28,735mn	20.3%

Russia

The Russian market continues to grow in terms of e-commerce. Its online population of **85.0 million people** represented the **largest Internet base in Europe** in 2014. Still, this only represents an **Internet penetration rate** of **59.2%**, which is considerably below the European average of **75.0%**. This means that there still is a **real growth potential** for the e-commerce market.

More and more of these Internet users have also become **online shoppers**. In fact, from 2009 to 2014 the number of people that purchase goods and/or services online **more than tripled**, from **8.5 million** to **28.0 million**.

In addition, Russians have more money to spend in comparison with a number of years ago. The **GDP per capita** amounted to **€6,195** in 2009, but this number nearly doubled to **€11,600** last year. The average spending per e-shopper also increased by more than **€200** over this period, to **€671** in 2014.

These three factors combined, the **large Internet base**, the **increasing number of e-shoppers** and **growing online spending**, ensure that **Russian e-commerce sales** will continue to grow significantly in the near future.



Average spending per e-shopper **€671**

€18.8bn

E-commerce sales in 2014

25.4%

E-commerce growth in 2014

Most purchased items:

1. Electronics & Technique
2. Clothing & Shoes
3. Auto Parts
4. House Goods & Furniture
5. Children goods



143.7 million

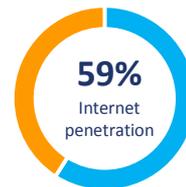
руб

Ruble (RUB)



18.0%

E-commerce basics



The Shopper



28.0 mln
e-shoppers

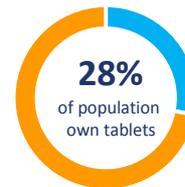
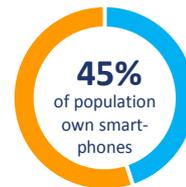


92.1 mln
unserved consumers



4.2 mln
cross-border e-shoppers

The M-commerce Revolution



Ukraine

Ukraine is experiencing an especially tough year at the moment, and this is also reflected in the country's **economy** last year. Ukraine's GDP decreased from **€137.1bn** to **€132.0bn**, which equals a growth rate of **-3.7%**.

However, at **1.70%**, the **share of e-commerce in the GDP** was quite significant. As a matter of fact, the **Ukrainian eGDP share** was the highest in the Eastern European region and considerably higher than that of Russia (**1.21%**).

Ukraine's total **B2C e-commerce sales** grew less strongly as in the preceding but the growth rate still reached **21.6%**, resulting in a turnover of **€2.3bn**. For 2015, this rate is expected to increase again, to **35.0%**.

Ukrainian e-shoppers are starting to find global e-commerce giants for their online purchases of goods and/or services. Last year, **Alibaba (3rd)**, **eBay (8th)** and **Amazon (13th)** were all represented in the top 15 of most popular Internet stores. Still, domestic online shops **rozetka.com.ua** and **eldorado.com.ua** remained Ukraine's most important e-commerce sites.



€661
Average spending
per e-shopper

€2.3bn

E-commerce sales
in 2014



21.6%

E-commerce
growth in 2014



41.8

Consumer confidence
in March 2015



45.2 million

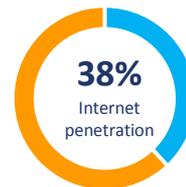


Hryvnia (UAH)



20.0%

E-commerce basics



The Shopper



3.4 mln
e-shoppers

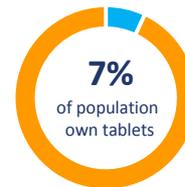
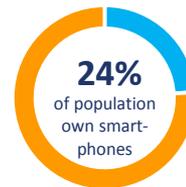


35.5 mln
unserved consumers



0.5 mln
cross-border
e-shoppers

The M-commerce Revolution



Overview and Forecast

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



European e-commerce turnover has been growing steadily over the years, with an annual growth of around **15%**. It is expected that this growth will continue in the years to come, resulting in European e-commerce sales of **€477bn** in 2015, **€540bn** in 2016 and **€609** in 2017.

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

As a result, the share of the three leaders in Europe – the UK, Germany and France – of **60%** will gradually decrease to around **55%** in 2016. Countries such as **Russia, Spain** and **Italy** are still well behind these three leaders, but they will very probably gain some ground and improve their share in the European B2C e-commerce market of goods and services.

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

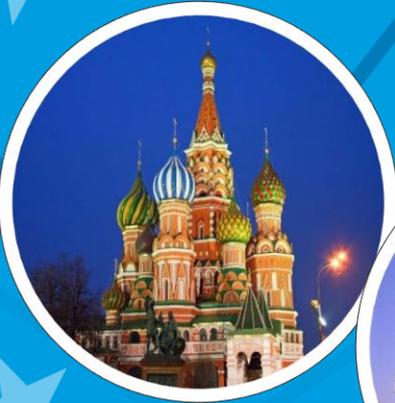
OVERVIEW AND FORECAST OF EUROPEAN B2C E-COMMERCE TURNOVER



Source: Ecommerce Foundation, 2015

Ecommerce Europe

Information about Ecommerce Foundation





Information about Ecommerce Europe

About Ecommerce Europe

Ecommerce Europe

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

Goals

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

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

Ecommerce Europe Events

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

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

National Associations

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

Who can be involved?

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

Why get involved?

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

Ecommerce Foundation's Research Services



The **Ecommerce Benchmark** allows members to compare & improve their e-commerce activities.



The **EcommerceWiki** is the online guide for e-commerce managers with templates, process descriptions, etcetera.



EcommerceReports curates all e-commerce-related research across the globe by adding an editorial board and peer review.



ShoppingTomorrow is a continuous program to help members look into the future of shopping.



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



10 yearly **National E-commerce Reports** supporting members going cross-border.



About the reports

This **B2C E-commerce Report** is published **annually** by **Ecommerce Foundation** and provides overviews of the mature and emerging markets and of the major Global statistics in the field of e-commerce.

In addition to this Global B2C E-commerce Report, Ecommerce Europe annually publishes five regional reports, which cover **North America, Latin America, Asia-Pacific, MENA** and **BRICS**. They include facts, figures, trends and forecasts on these different Global regions.

Personalized report

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

Light reports

Ecommerce Europe also publishes light reports, which contain a summary of the full reports. These light reports can be freely downloaded from www.ecommerce-europe.eu/facts-figures/free-downloads

Information about the Reports

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EUROPEAN REGIONAL REPORTS	PRICE
Western European Report Belgium, France, Ireland, Netherlands and United Kingdom	€790*
Central European Report Austria, Czech Republic, Germany, Hungary, Poland and Switzerland	€790*
Southern European Report Greece, Italy, Portugal, Spain and Turkey	€790*
Northern European Report Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway and Sweden	€790*
Eastern European Report Romania, Russia and Ukraine	€790*
European B2C E-commerce Report 2014	€1,290*
All European reports (5 regional reports + European Report)	€2,950*

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

REGIONAL/CONTINENTAL REPORTS	PRICE
North America USA, Mexico and Canada	€790
Latin America Brazil, Argentina and Chile	€790
Asia-Pacific Japan, China, India, Australia, Indonesia, Vietnam and South Korea	€790
MENA region The Middle East and North Africa	€790
BRIC Countries Brazil, Russia, India and China	€790
Global B2C E-commerce Report 2014	€1,290
All-In-One E-commerce Report Package (European and Global Report + 5 European Regional Reports + 5 Regional/Continental Reports)	€4,950



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Media Partners

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

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

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

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

Company Members

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

Benefits for **COMPANY MEMBERS** include:

- Free Ecommerce Europe Member logo for your website
- Free Yearly European B2C E-commerce Report (€1,950)
- Free 5 Regional Reports on European B2C E-commerce (€3,950)
- Free full Conference Package for 1 person tot the Global E-commerce Summit (€1,295)
- Free entrance for 1 person to the Ecommerce Europe Annual Conference (€195)
- Free entrance to Round Table meetings in European cities
- 50% discount on Global B2C E-commerce Report (€2,450)
- 50% discount on 3 Global Regional B2C E-commerce Reports (950 per report)
- 50% discount on the premium Ecommerce Benchmark (€499)
- Receive weekly and monthly monitoring reports on the association's policy, lobbying and advocacy efforts.

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





Our Preferred Business Partners

About Ecommerce Europe

Business Partners

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

Benefits for BUSINESS PARTNERS include:

- Free Ecommerce Europe business partner logo for your website
- One free advertorial/banner in Ecommerce Europe newsletter (€2,250)
- Free European B2C E-commerce Report (€1,950)
- Free 5 Regional Reports on European B2C E-commerce (€2,950)
- Free entrance for 2 persons to the Ecommerce Europe Annual Conference (€390)
- Free 2 Full Conference Packages to the Global E-commerce Summit (€2,590)
- Free entrance to Round Table meetings in European cities
- Pro-active involvement advocacy and lobbying team in Brussels
- 50% discount on Global B2C E-commerce Report (€2,450)
- 50% discount on 3 Global Regional B2C E-commerce Reports (€950 per report).



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



GOMSEC

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

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

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

All data reported in **the national currency of the country involved** are converted into euros according to **the average (annual) rate of exchange** as provided by, preferably, **the European Central Bank (ECB)** or the **national bank** of the particular country. The reference period that is used for this was from **1 January 2013 to 31 December 2013**. Growth rates are calculated and measured by the B2C e-commerce sales in the national currency.

Definition of B2C e-commerce sales

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

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

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

Classification of B2C e-commerce

The following classification in Table 1 provides an overview of areas and sectors included in GOMSEC.

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

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

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

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



About Ecommerce Europe

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

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

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

Toys
<i>Toys</i>
Indoor and outdoor toys

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

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

About Ecommerce Europe

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

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

Telecom
<i>Telecom</i>
Smartphones, mobile phones & mobile devices Telefax and answering machines Headsets & Accessoires (mobile) phones Prepaid cards and tariffs of new phone subscriptions

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

Others	
<i>Services</i>	<i>Products</i>
Dating based on new subscriptions Other Services	Cars and parts Products for animals Flowers & Plants Optician (excl. sunglasses, hearing aid) Adult

- **Broadband access:** the availability of broadband is measured by the percentage of households that are connectable to an exchange that has been converted to support DSL technology, to a cable network upgraded for Internet traffic, or to other broadband technologies. It includes fixed and mobile connections (source: Eurostat)
- **Cross-border e-commerce:** percentage of e-commerce purchased at foreign sites
- **Ease of Doing Business Index:** The Ease of Doing Business Index is developed by the World Bank, and averages the country's percentile rankings on nine topics. It is made up of a variety of indicators, giving equal weight to each topic. The rankings for all economies are benchmarked to June 2010. The Index covers 185 countries.
- **E-commerce (or electronic commerce), a subset of e-business:** any B2C contract on the sale of products or services fully or partly concluded by a technique for distance communication.
- **E-commerce GDP:** total amount of goods and services online divided by the total Gross Domestic Product (GDP).
- **Economic Freedom Index:** the Index of Economic Freedom is an annual guide published by The Wall Street Journal and The Heritage Foundation, Washington's No. 1 think tank. For over a decade, the Wall Street Journal and The Heritage Foundation have tracked the march of economic freedom around the world with the influential Index of Economic Freedom. There are 5 categories, ranking from Free (with a score between 80 and 100) to Repressed (between 40 and 49.9).
- **E-households:** number of households that use the Internet for personal gain.
- **E-household expenditure:** expenditure per household that bought goods or services in the past year.
- **Global Online Measurement Standard for B2C E-commerce (GOMSEC):** aims to provide guidelines to measure and monitor B2C e-commerce in order to enable all European countries to provide data with respect to the penetration of B2C e-commerce in a standardized way.
- **E-Government Index:** The UN's E-Government Index provides a comparative assessment of the e-government development of UN Member States. One of the primary factors contributing to a high level of e-government development is concurrent past and present investment in telecommunication, human capital and provision of online services.
- **E-services or electronic services:** "Deeds, efforts or performances whose delivery is mediated by information technology. Such e-service includes the service element of e-retailing, customer support, and service delivery." This definition reflects three main components: service providers, service receivers and the channels of service delivery (i.e. technology). (Jennifer Rowley, Professor Information and Communications, Manchester Metropolitan University, UK)
- **Inactive online population:** users that have access to the Internet but have not (yet) purchased goods or services online in the past year.

- **Logistics Performance Index (LPI):** The Logistics Performance Index (LPI) measures the “logistics friendliness” of 155 countries. It helps countries identify the challenges and opportunities they face in their trade logistics performance and what they can do to improve this. The Index is developed by the World Bank and is based on a worldwide survey of operators, such as global freight forwarders and express carriers.
- **Mobile commerce (or m-commerce):** the ability to conduct commerce using a mobile device e.g. a mobile phone, a PDA, a smartphone, a tablet or other (emerging) mobile equipment.
- **Mobile subscriptions:** mobile cellular telephone subscriptions are subscriptions to a public mobile telephone service using cellular technology, which provide access to the public switched telephone network. Post-paid and prepaid subscriptions are included (source: Eurostat)
- **Networked Readiness Index (NRI):** The NRI measures the tendency for countries to exploit the opportunities offered by information and communications technology (IT). The NRI comprises three components: the environment for IT offered by a given country or community, the readiness of the country’s key stakeholders to use IT, and the usage of IT among these stakeholders.
- **Online buyer (or e-shopper, E-buyer):** an individual who regularly bought or ordered goods or services through the Internet.
- **Online expenditure:** spending per user who purchased goods or services online.
- **Online Retail (or e-retail, electronic retail or retailing or even e-tailing):** the selling of retail goods and services on the Internet. In the limited sense of the word, sectors such as online leisure travel, event tickets, downloading music or software are not included. Online-only retail shops are often referred to as pure players.
- **Penetration levels:** the percentage of a population using the Internet, mobile phones, smartphones or tablet devices.
- **Retail sales:** the selling of mainly goods from businesses to individuals from a traditional or so-called bricks-and-mortar shop.

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

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

The sources consulted include:

(Inter)national Associations

- Ecommerce Europe
- Distanshandel Norge (Norway)
- FDIH (Denmark)
- KAUPPA (Finland)
- SDH (Sweden)
- Adigital (Spain)
- BeCommerce (Belgium)
- Händlerbund (Germany)
- ETID (Turkey)
- FEVAD (France)
- National Retail Federation (USA)
- Netcomm (Italy)
- Retail Excellence (Ireland)
- Shop.org (USA)
- Sdh (Sweden)
- Apec (Czech Republic)
- Thuiswinkel.org (Netherlands)
- Netcomm Suisse (Switzerland)
- Versandhandel (Austria)

Corporate sources

- A.T. Kearney
- Deloitte
- Facebook
- Forrester
- GfK
- Google
- Hybris
- Innopay
- Planet Retail
- SaleSupply
- Social Bakers
- Twitter
- TNS NIPO
- I-Research
- TWS Global

Publications

- eMarketer
- E-commercefacts.com
- Eurostat
- Internet Retailing
- Tribes.no
- Digitaleastfactor.com
- Euromonitor.com

Other sources

- Digital Hub Development Agency (DHDA)
- European Commission
- Eurostat
- European Central Bank (ECB)
- European Banking Association (EBA Clearing)
- International Monetary Fund (IMF)
- International Telecommunications Union (ITU)
- Internetworldstats
- National Statistics offices
- The Heritage Foundation
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- CIA: World Factbook
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- Dibspayment.com
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- Ecommercenews.eu
- About-payments.com
- The Modern Spice Routes (PayPal)