



Press Kit for the European B2C Ecommerce Report 2018



For your convenience, we offer you a Press Kit of the European B2C Ecommerce Report 2018 containing:

- Introduction: European B2C Ecommerce Report 2018
- Social Media Snippets
- Press Release
- The European Ecommerce Report 2018: relevant findings outlined (executive summary)
- Images & European Facts



Introduction: European B2C Ecommerce Report 2018

The Ecommerce Europe European B2C Ecommerce Report 2018 provides a brief overview of the state of ecommerce in Europe. This report includes ecommerce trends, facts and figures, and offers insights into the European ecommerce market.

Topics and Scope

The report is split into 7 main chapters:

- Introduction to Europe
- European Ecommerce Facts & Figures
- Western Europe
- Central Europe
- Southern Europe
- Northern Europe
- Eastern Europe

Social Media Snippets

- 25- 54-year-old purchase most frequently online
- Unemployment is decreasing due to the economic boom
- Europe's population continues to increase (millions)
- The number of households is increasing steadily
- The Logistical Performance differs significantly per country
- GDP of Europe is 17 trillion and increasing
- Did you know that Macedonia and Portugal have most cross border purchases?
- Macedonian and Portuguese consumers are the most inclined to buy from a foreign e-retailer, (85%)
- Consumers consider "speed of delivery" as biggest hurdle to shop cross border
- The 65+ age group is slowly growing in cross-border shopping in Europe (2017)
- Clothes & Sports and Travel are still most purchased online
- For 2018, the European B2C ecommerce turnover is forecasted to grow by 14% to €612 billion
- 24% of online shoppers decided to purchase cross-border in 2017
- Logistical performance plays a crucial role in the success of ecommerce penetration and integration within a nation



Press Release – Under embargo

European B2C ecommerce still growing fast, with national markets moving at different speeds

Online retail has continued its double-digit growth, with European ecommerce turnover increasing by 11% to €534 billion in 2017 and forecasted to grow by 13% to €602 billion in 2018. In 2013, it was no more than €307 billion. This is one of the many findings of the European B2C Ecommerce Report 2018, that will be jointly launched today by Ecommerce Europe and EuroCommerce. The report sets out the main ecommerce¹ trends, facts and figures, and offers insights for each of the European ecommerce markets.

Marlene ten Ham, Secretary General of Ecommerce Europe, stated: “As the European ecommerce association, we are delighted to see these figures, because strengthening and fostering online sales in Europe is our mission. We aim at creating a level playing field for online trading in EU countries and these data offer great insights into European ecommerce markets and provide valuable information for companies that want to start selling cross-border in Europe”.

Online retail is strongest in Western Europe, with approximately 68% of total European online retail turnover. This can be attributed mainly to Western Europe’s advanced infrastructure, high internet penetration and high level of consumer trust and familiarity with online shopping. Southern Europe, Northern Europe and Eastern Europe show lower share of European ecommerce: 12%, 8% and 6% respectively. However, these are the regions with the fastest growth, reflected by the annual ecommerce growth rate in Romania of 37% last year.

Key trends identified in the report show that the largest ecommerce market in Europe is the UK (€178 billion²), followed by France (€93.2 billion³) and Germany (€93 billion⁴). The UK scores the highest also in terms of E-GDP (i.e. Ecommerce Turnover / GDP = Ecommerce Share of GDP), with a 2017 rate of 7% and a projected 8% in 2018.

The report also reveals challenges that consumers still face when shopping online. Among the main complaints are speed of delivery (17%) and technical failures (13%). Logistical performance plays a crucial role in the success of ecommerce penetration and integration within a nation. Germany, Luxembourg, The Netherlands and Sweden excel in this regard, topping the list of European countries according to the Logistical Performance Index from the World Bank.

Christian Verschueren, Director-General of EuroCommerce, commented:

“These figures show how the fast-growing role of online sales is both driving, and responding to, changes in consumer purchasing behaviour. In those markets where this trend is still slow, much progress could be made if more was invested in the communications and logistical infrastructure which ecommerce needs to work effectively if it is to thrive. Meanwhile, we will continue to press for a regulatory regime which creates the right conditions for growth in all channels of sales, and helps the EU compete globally in innovation in retail.”

~ENDS~

¹ Ecommerce in this report is seen as any B2C sale of products or services fully or partly concluded by distance communication technology.

² 2018 forecast

³ Idem

⁴ Idem



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About Ecommerce Europe

Ecommerce Europe is the voice of the European digital commerce sector. Through its 20 national ecommerce associations, Ecommerce Europe represents more than 75,000 companies selling goods and services online to consumers in Europe. European merchants still face difficulties when selling online, specifically cross-border. That is why Ecommerce Europe acts at European level to help legislators create a better framework for online merchants, so that their sales can grow further. Ecommerce Europe aspires to be the European platform for digital commerce, where members of national ecommerce associations, direct company members and suppliers can: network and share best practices, exchange information and knowledge on issues concerning their business; work towards promotion, professionalization and self-regulation the digital commerce industry, thanks to projects like our European Trustmark; create better fitted frameworks that can foster online sales at all levels, both domestically and cross-border. Moreover, Ecommerce Europe provides certified online companies across Europe with a European Trustmark label, with the aim of increasing consumers' trust in cross-border purchases.

About EuroCommerce

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



The European B2C Ecommerce Report 2018

Relevant findings outlined

Internet penetration growth in Europe is increasing at a steady pace, with a projected 83% of individuals being connected in 2018. Northern Europe has the lead in this regard, with almost 95% of the population having internet access.

Levels of online shopping differ greatly across the region and represent a large potential audience with which to grow the consumer-base in the future. Countries such as the Netherlands, Sweden and the UK represent markets that have mature ecommerce consumer-bases and are accustomed to ordering goods/services over the internet (82%, 81%, and 78% respectively). However, nations such as Macedonia, Romania, and Montenegro are much lower, even with relatively high internet penetration levels.

When looking at the amounts spent online, most people spend on average between €100 and €499. In terms of the category of goods most frequently bought by consumers, Clothing and Sports Goods are top of the list. This is closely followed by Media & Computer Software and Travel and Holiday Accommodation.

Among the countries covered in this report, the overall B2C ecommerce turnover was €534 billion for 2017, forecasted to grow to €602 billion in 2018. This demonstrates an impressive growth rate from the 2013 figure of €307 billion.

B2C Ecommerce expected to rise to €602 billion in 2018

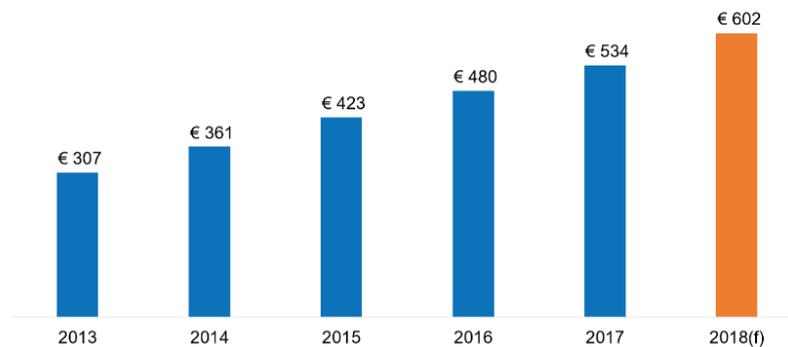


Figure 1. B2C Ecommerce expected to rise to € 602 billion in 2018

Of this turnover, Western Europe takes the lion's share (67%). Reasons for this include the advanced infrastructure, high internet penetration and high level of consumer trust and familiarity with online shopping. Following Western Europe in the share of B2C turnover is Southern Europe (12%), Northern Europe (8%), Eastern Europe (6%) and finally Central Europe (5%). The largest Ecommerce market found within Europe is the UK (€178 billion) with France (€93.2 billion) and Germany (€93 billion) following closely behind. The UK also holds the top position for E-GDP (Total Ecommerce Turnover / GDP = Ecommerce Share of GDP), with a 2017 rate of 7% and a projection of 8% in 2018. Ecommerce sales in Southern Europe are on the rise with a projected jump of 4% between 2017 and 2018 (from



14% to 18%). On a country-by-country basis, Romania has seen the largest ecommerce growth, with a significant growth rate of 37%.

When looking at e-shopping, 38% of consumers decided to buy cross-border in 2017. Of those, half chose to buy from an e-retailer based in their own country. Only 19% bought from another EU country and 13% bought from an e-retailer outside the EU. Ecommerce, by its very nature, facilitates the movement of goods and services across the border, yet not all countries feature cross-border ecommerce at the same level. Of all the countries featured in this report, Macedonian and Portuguese consumers are the most likely to purchase from a foreign e-retailer, with a rate of 85%. This level is in stark contrast with other countries such as Turkey (2%), Romania (3%) and Poland (6%). Among the challenges facing ecommerce consumers the speed of delivery tops the list (17%), with technical failures also being a big issue for consumers (11%).

Logistical performance plays a crucial role in the success of ecommerce penetration and integration within a nation. Germany, Luxembourg, The Netherlands, and Sweden excel in this regard, topping the list of European countries according to the Logistical Performance Index from the World Bank. The Ease of Doing Business in a country also plays an important role in attracting and retaining ecommerce businesses. When looking at European countries, Denmark, the UK, and Norway top the list whilst the Ukraine, Malta, and Bosnia and Herzegovina are at the bottom.

Amongst the different retailers operating in Europe, it comes as no surprise that Amazon remains the leader, with Argos and Bonprix close behind.

Marketplaces are an ever-present feature of the ecommerce world. The top three players are Aliexpress, Amazon, and eBay, which operate as global players. When looking to Europe, Amazon and eBay are more firmly entrenched with a higher rate of visits from online users. One example of this can be found in the UK, where 33.5% of all UK online spending went through Amazon. But not all marketplaces behave the same, and their strategies for continued growth differ. Growth has taken place primarily through acquisition and investment.

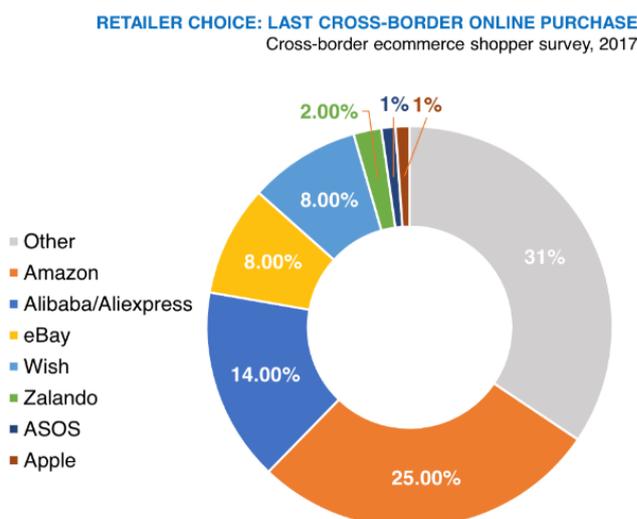


Figure 2. Retailer choice: last cross-border online purchase



Images - European Facts

European Ecommerce report 2018 HIGHLIGHTS

€17 TRILLION GDP OF EUROPE

UK 117.7

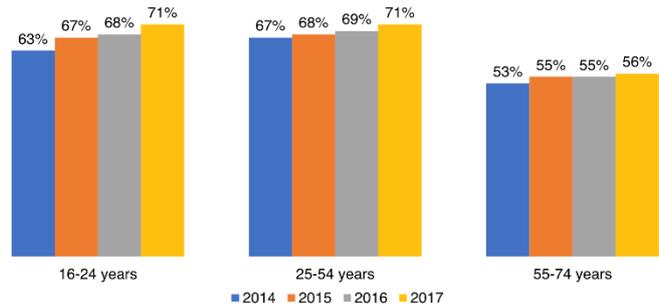
FRANCE 93.2

GERMANY 93.0

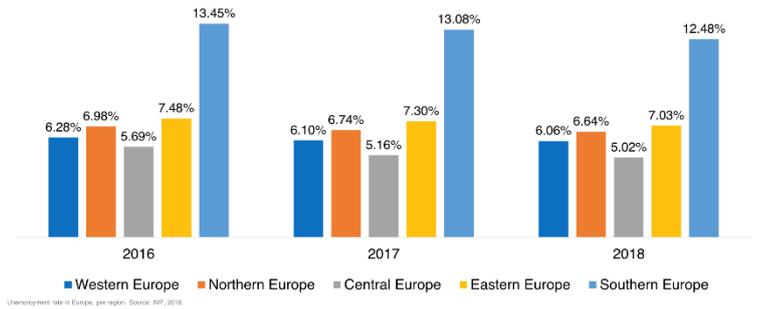
WHO PURCHASED MOST FREQUENTLY ONLINE

24% of all online shoppers bought abroad in 2017

25-54 year-olds purchase most frequently online

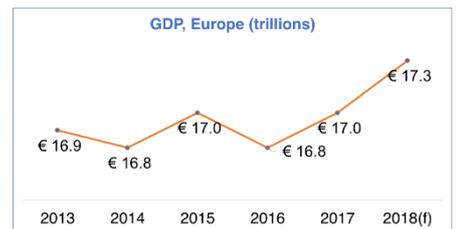


Unemployment is decreasing due to the economic boom



GDP of Europe is 17 trillion and increasing

Region	GDP per capita 2017	GDP per capita 2018(f)
Western	€35,515	€36,112
Northern	€41,456	€41,456
Central	€20,903	€21,384
Eastern	€6,904	€6,720
Southern	€16,805	€16,825



RETAILER CHOICE: LAST CROSS-BORDER ONLINE PURCHASE

Cross-border ecommerce shopper survey, 2017

