

E-commerce in Europe 2020



How the pandemic is changing e-commerce in Europe

postnord



E-barometern

PostNord i samarbete med Svensk Digital Handel och HUI Research

2020

ÅRSRAPPORT

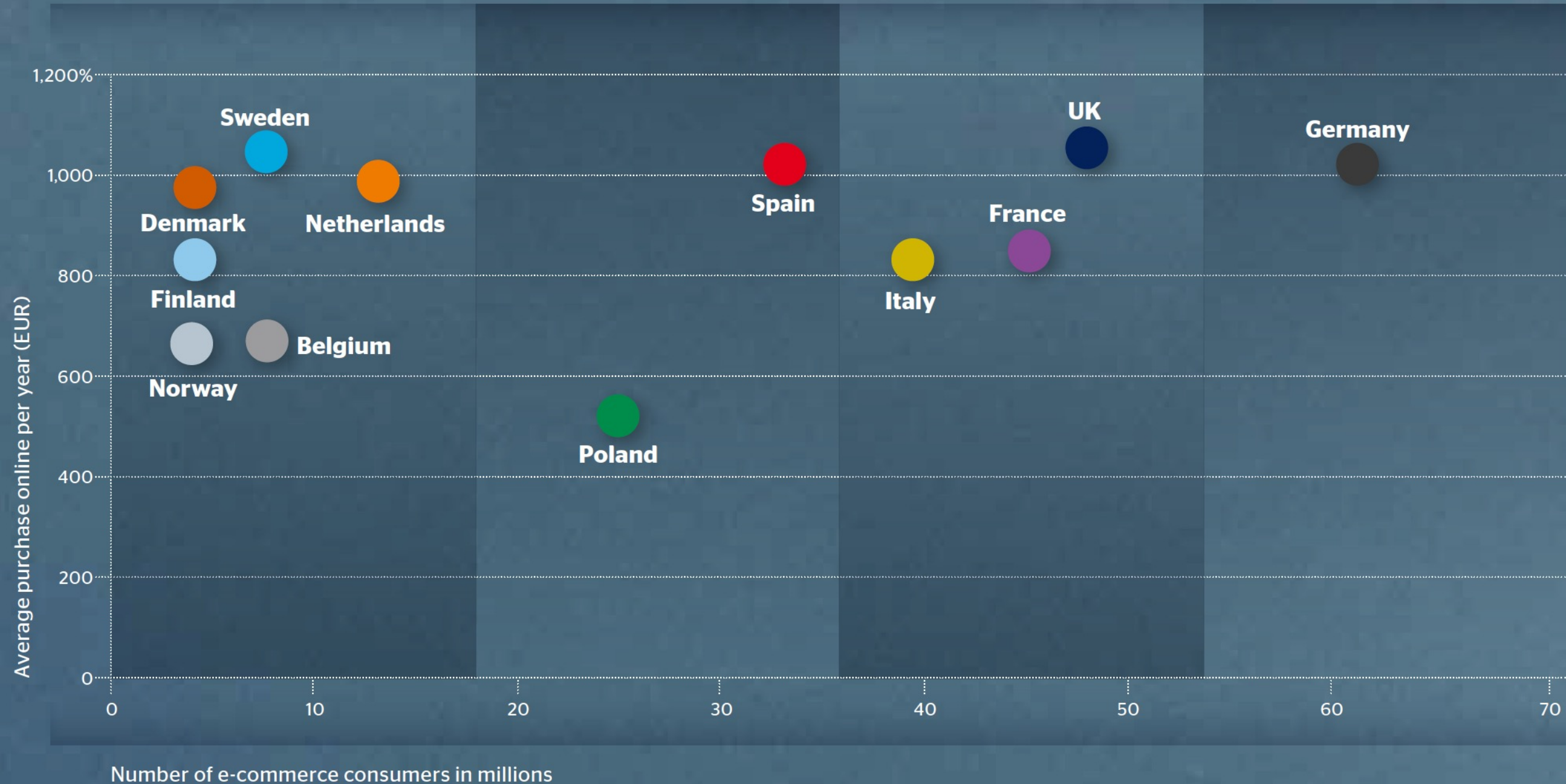
postnord



Germany and the UK are Europe's strongest e-commerce markets

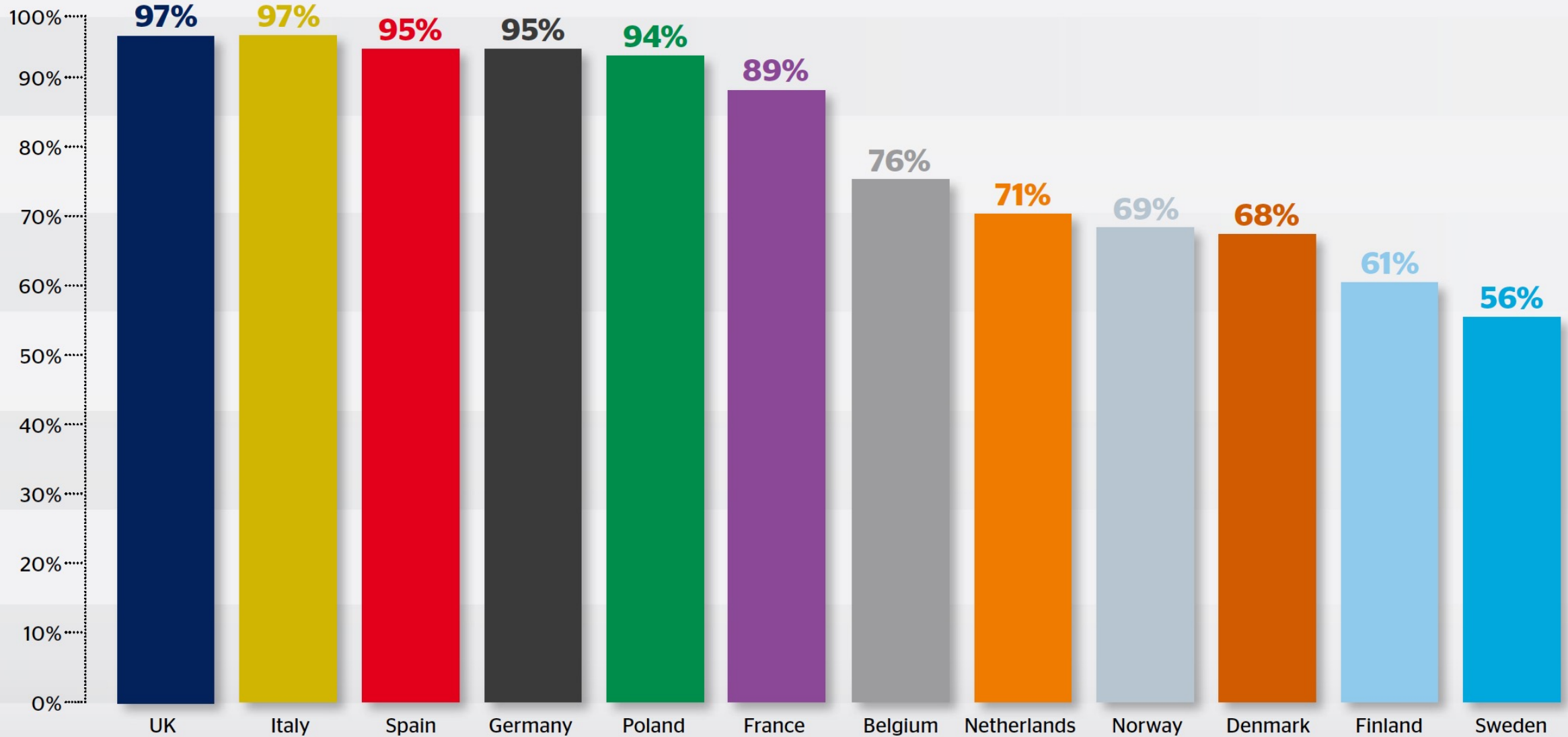
Number of e-commerce consumers and average online spend per year

Basis: Have shopped online



Proportion that shopped online from a marketplace during the year

Wish, Zalando, Amazon, Ebay, Etsy, Alibaba/Aliexpress, JD.com and Allegro
Basis: Have shopped online

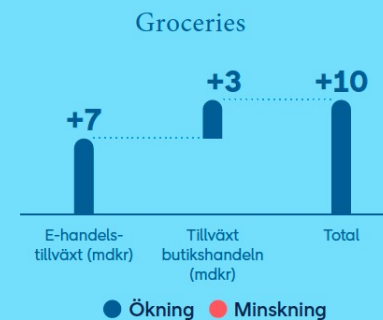
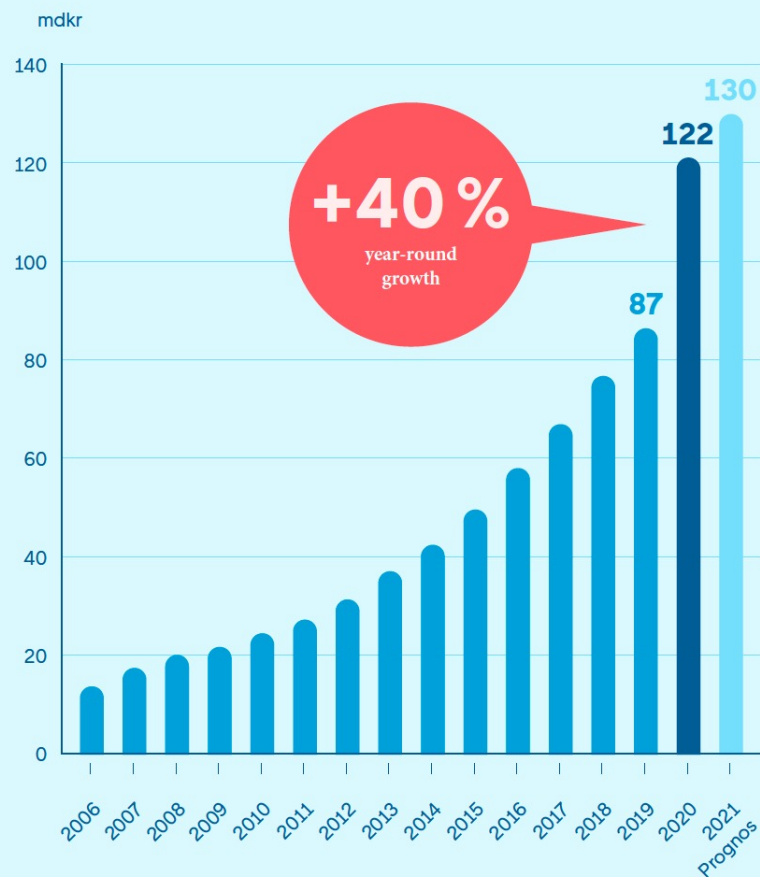


Home delivery in daytime	64%	45%	51%	70%	35%	38%	41%	25%	4%	38%	6%	7%
Delivered to my mailbox/multi-occupancy mailbox by the mail carrier	11%	23%	17%	9%	4%	12%	36%	42%	39%	0%	52%	14%
Collect the product myself from a distribution point	2%	10%	12%	4%	6%	6%	2%	19%	37%	24%	14%	33%
Home delivery in evening	11%	8%	14%	6%	7%	29%	8%	5%	4%	11%	6%	4%
Collect the product myself from a parcel machine	1%	1%	0%	3%	38%	2%	5%	2%	2%	20%	1%	35%
Delivery to workplace	3%	3%	2%	4%	2%	5%	2%	1%	0%	2%	0%	1%
Pick up at the online store's physical store	1%	2%	1%	1%	2%	3%	1%	1%	2%	0%	13%	2%

■ UK
 ■ Belgium
 ■ Netherlands
 ■ Italy
 ■ Poland
 ■ Spain
 ■ Germany
 ■ France
 ■ Sweden
 ■ Denmark
 ■ Norway
 ■ Finland

Extreme - Ecommerce
growth 2020 when the
industry grow with 35 B SEK

E-Commerce revenue

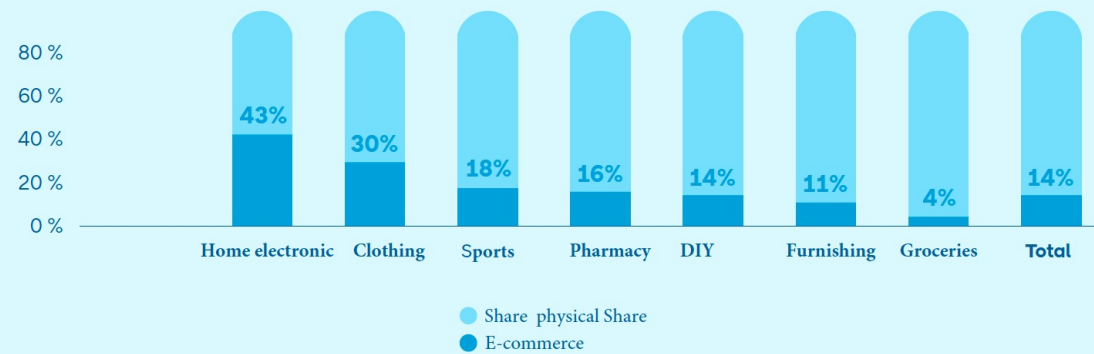


* Systembolaget ingår inte i dagligvaruhandel men ingår i total detaljhandel.

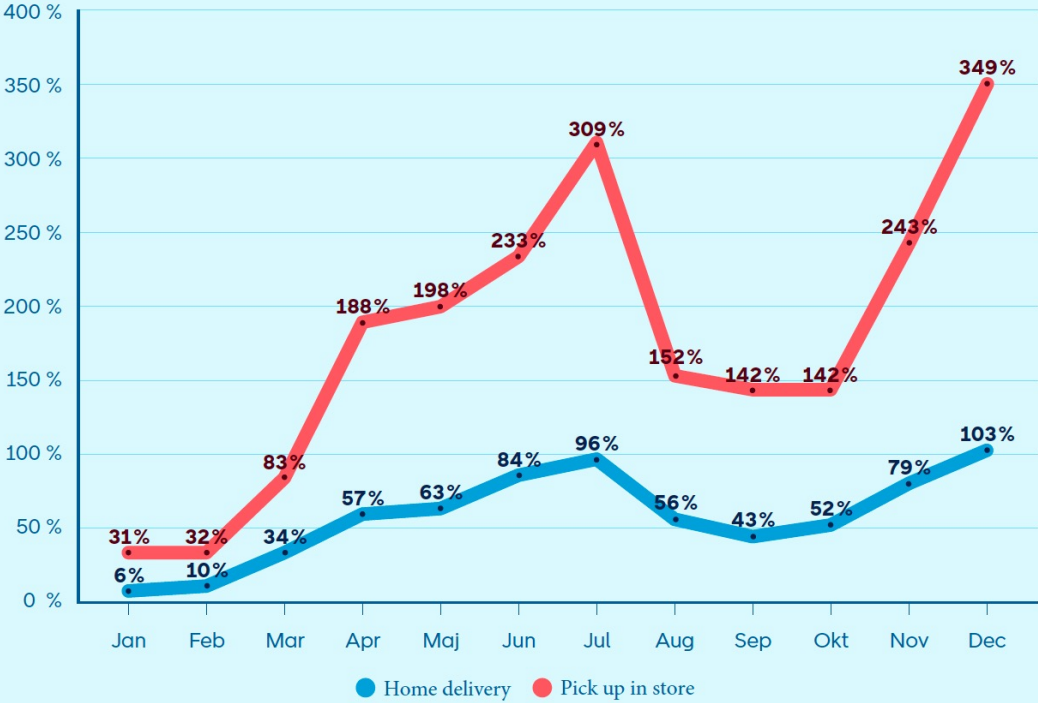
Sales growth and sale per sub-industry

	Growth rate2020	Revenue 2020 (mdkr)	E-commerce share 2020	E-commerce share2019
Groceries	95 %	14	4 %	2 %
Furnishing/homeinterier	63 %	7	11 %	7 %
Pharmacy	59 %	8	16 %	11 %
Home electronic	43 %	25	43 %	33 %
DIY	41 %	7	14 %	12 %
Sports/leasure	38 %	5	18 %	14 %
Books&Media	26 %	6	NA	59 %
Clothing/shoes	16 %	15	30 %	20 %
Children/Toy	8 %	3	NA	NA
	40 %	122	14 %	11 %

E-commerce share per sub industry



Growth in groceries divided between home delivery and pick up in store















Source: Svensk Dagligvaruhandels Dagligvaruindex

Men
aged
18-49

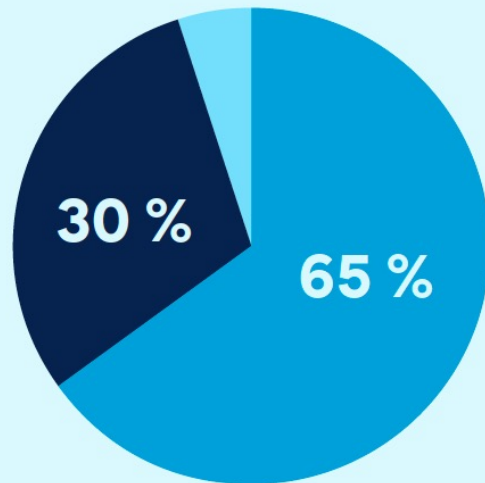
In which type of store did you make your most recent purchase?

Women
aged
18-49

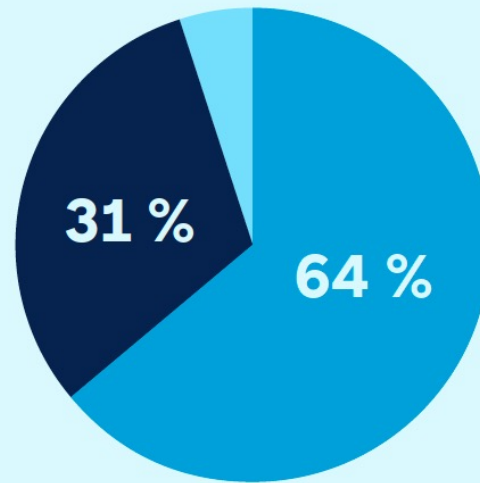
18-29 years old 30-49 years old 50-64 years old 65-79 years old | **18-29 years old 30-49 years old 50-64 years old 65-79 years old**

 City center	23%	20%	34%	31%	25%	27%	35%	35%	City center 
 Shopping center	20%	25%	29%	37%	18%	23%	25%	27%	Shopping center 
 Hypermarket	8%	9%	6%	12%	11%	11%	14%	17%	Hypermarket 
Sum physical retail	51%	54%	69%	80%	54%	61%	74%	79%	Sum physical retail
 Computer	27%	20%	16%	11%	22%	8%	10%	8%	Computer 
 Cell phone	17%	19%	5%	2%	20%	23%	8%	3%	Cell phone 
 Tablet	2%	3%	4%	2%	2%	3%	5%	3%	Tablet 
Sum e-commerce	46%	42%	25%	15%	44%	34%	23%	14%	Sum e-commerce

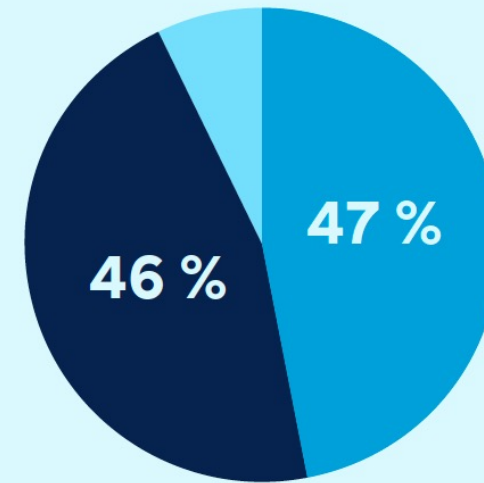
The proportion of e-commerce consumers who made their most recent purchase in a physical store or online store



2018








2019



2020

● Webstore ● Physical store ● Don't know

Proportion who prefer different delivery options

	September 2020	December 2020
 Pick up point	36 %	26 %
 Locker	9 %	12 %
 Home delivery with signature	13 %	15 %
 Home delivery without signaturer	45 %	52 %
 Click & Collect	1 %	1 %