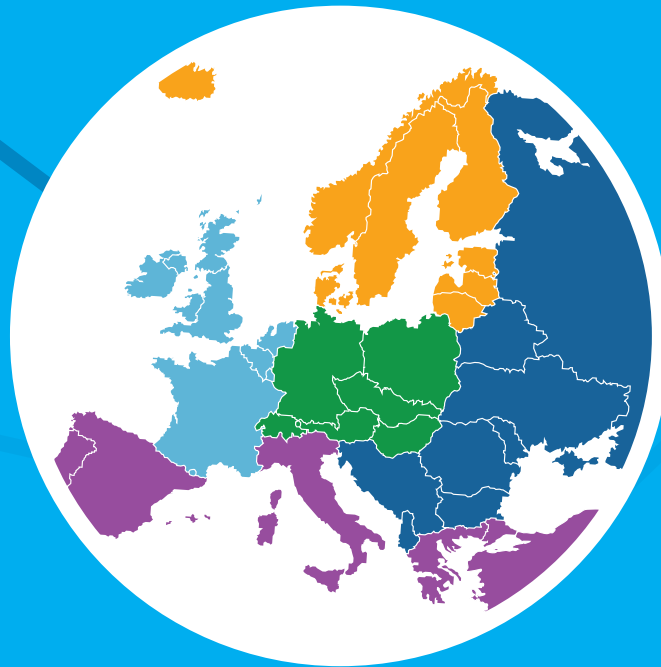


Europe B2C Ecommerce Report 2013

Facts, Figures, Markets, Trends and Forecast of European B2C Ecommerce 2012
Including Infographics and Country Profiles of Leading and Emerging Ecommerce Markets in Europe



Light version



www.ecommerce-europe.eu



EUROPE 2012 Key data at a glance



ecommerce news



El comercio electrónico crece en Europa un 19%, hasta los 311.600 MM€

El comercio electrónico avanza imparable en el viejo continente. Muestra de ello son los resultados del estudio sobre e-commerce B2C realizado por la asociación Ecommerce Europe, la organización europea para los retailers online, en colaboración con



Southern Europe catching up on e-commerce boom

Europe continued to hold the world's largest share of the business-to-consumer e-commerce market, increasing its total revenue by almost one-fifth to €311.6 billion during 2012, according to a new survey seen by EurActiv.



Daniel Marco
@dmarcop

“@Ecommerce_EU: European E-commerce to reach € 312 billion in 2012, 19% growth ow.ly/ljmjR” @tic #idigital #ecommerce



Martí Manent
@martimanent

España, cuarto país europeo en comercio electrónico European E-commerce to reach €312 billion in 2012 ecommerce-europe.eu/press/2013/05/...



Andres Ponce
@andresponce

PRESS RELEASE: European E-commerce to reach € 312 billion in 2012, 19% growth... ow.ly/ljrtN

Beantwoorden Retweeten Toevoegen aan favorieten Meer



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



Les ventes de e-commerce en Europe ont atteint 311 milliards d'euros en 2012

La progression est de 19% selon le rapport d'Ecommerce Europe, qui regroupe les acteurs européens du secteur.



L'activité du e-commerce européen a bondi de près de 20 % en 2012

L'an dernier, les ventes en ligne ont permis de réaliser 311,6 milliards d'euros de chiffre d'affaires en Europe. Les marchés les plus importants sont le Royaume-Uni suivi de l'Allemagne et de la France, qui comptent à eux trois pour plus de 60% des ventes totales.



E-Commerce: Umsatz in Deutschland knackt Marke von 50 Milliarden Euro (Infografik)

Jochen Krusch irrt. Doch ganz so unrecht dürfte ihm das nicht sein. Denn der E-Commerce-Markt in Deutschland erreicht schon jetzt die Marke von 50 Milliarden-Euro. Diese Zahl nennt der European B2C Ecommerce Report des europäischen E-Commerce Verbands „Ecommerce Europe“.

820 million people live in Europe.

529 million people use the internet.

250 million people are e-shoppers.

Top 5 E-commerce countries in turnover (EUR million)

	UK	96,193
	German	50,000
	France	45,000
	Spain	12,969
	Russia	10,302

ECOMMERCE EUROPE RELEASE REPORT: Some facts 22 May till 26 May:
143 tweets with Ecommerce Europe in it
38 news items / blogposts
25.000 estimate of the range of impressions

*stats from Tracebuzz



Ecommerce Europe

Rue d'Accolay 15 box 6
B-1000 Brussels - Belgium
Tel: +32 (0) 2 502 31 34

Website: www.ecommerce-europe.eu
Contact us at: info@ecommerce-europe.eu
For reports: research@ecommerce-europe.eu
Twitter: @Ecommerce_eu

In cooperation with GfK, hybris and Salesupply

**National Associations**



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Forecast up till 2016
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Online payments in Europe
Cross-Border ecommerce in Europe
The European Union (EU) - A Brief Overview

Preface

European B2C ecommerce is developing extremely well. In 2010 Europe overtook the USA, the biggest market in the world until then. In 2012 European B2C ecommerce, including online retail goods and services such as online travel bookings, events and other tickets, downloads etc., grew by 19% to reach €311.6 bn. Figures in Ecommerce Europe reports are based on the European Measurement Standard for Ecommerce (EMSEC) and are in compliance with data and figures from GfK, unless noted differently.

This light version of the Europe B2C Ecommerce Report 2013 focuses on facts, figures, trends and forecasts for Europe (including the 28 EU member countries). The 54-page full version of Europe B2C Ecommerce Report includes additional figures, trends and analysis. The full report also includes 18 brief profiles and Infographics of European countries. Ecommerce Europe is also publishing in-depth regional reports covering the various European regions: North, Central, West, East and South. The regional reports include in-depth country profiles and Infographics of over 30 European countries.

Ecommerce Europe, representing ecommerce associations and ecommerce companies in Europe, wishes to thank all participating national associations and their individual research partners for providing data and information. We also extend our thanks to all participating company members, business partners and stakeholders for their involvement in making Ecommerce Europe reports possible.

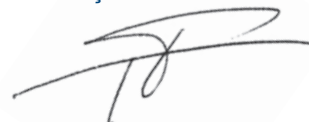
A special word of thanks to GfK for their close cooperation and involvement as well as granting access to exclusive data on industry sectors.

Ecommerce Europe's mission is to promote the interests of B2C ecommerce in Europe. Ecommerce Europe offers a platform to guide and assist companies in identifying and accessing new markets in Europe and worldwide and also to provide information on this fascinating, fast-growing industry. To this end, Ecommerce Europe not only collects data and know-how, but also prepares in-depth reports including facts, figures, trends and forecasts on Europe, the various regions of Europe, and on leading and emerging countries and markets around the globe.

The aim of all our reports is to provide insight in order to help online retailers make the most appropriate decisions in support of their strategy to expand their business into new markets. Please contact us for further information, purchases and tailor-made reports via our website www.ecommerce-europe.eu or email us at research@ecommerce-europe.eu

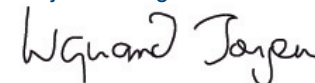
Brussels, June 2013

François Momboisse



President of Ecommerce Europe

Wijnand Jongen



*Vice-President and Chair of the Executive Committee
Chair of the Statistical & Research Board
Editor*



Europe: a brief Introduction

Europe is one of the world's seven continents. Comprising the most westerly peninsula of Eurasia, Europe is generally regarded as separated from Asia by the watershed divides of the Ural and Caucasus Mountains, the Ural River, the Caspian Sea and the Black Sea, and the waterways connecting the Black Sea with the Aegean Sea. Europe is bordered by the Arctic Ocean to the north, the Atlantic Ocean to the west, the Mediterranean Sea to the south, and the Black Sea and connected waterways to the southeast.

Its surface area makes Europe the world's second-smallest continent, covering about 10,180,000 square kilometres or 2% of the Earth's surface and about 6.8% of its land area. With over 17 million km² Russia is by far the largest country, taking up 40% of the continent (although the country has territory in both Europe and Asia) followed by Turkey with an area of 302,000 km² and Ukraine with 233,000 km². Vatican City is the smallest in size, just 0.44 km².

In 2012, the population of Europe was estimated to be 820 million (approximately one-ninth of the world's population), which makes Europe the third-most populous continent after Asia and Africa. Within Europe Russia has the largest number of inhabitants (142 million), followed by Germany (82 million) and Turkey (75 million).

A century ago, Europe had nearly a quarter of the world's population. The population of Europe has grown in the past century, but in other areas of the world (in particular Africa and Asia) the population has grown far more rapidly. Among the continents, Europe has a relatively high population density, second only to Asia. According to a United Nations (UN) population projection¹, Europe's population may fall to about 7% of world population by 2050. The UN predicts the steady population decline of vast areas of Eastern Europe.

With the exception of Armenia, Azerbaijan, Georgia and Kazakhstan (which countries are considered "transcontinental" countries²), Europe comprises 47 countries, including the 28 members of the European Union (including Croatia as of July 1, 2013), Iceland, Montenegro, Former Yugoslavian Republic of Macedonia, Serbia, Turkey (candidate members), Albania, Bosnia and Herzegovina and Kosovo (potential members of the EU). The other countries are Andorra, Belarus, Liechtenstein, Moldova, Monaco, Norway, Russia, San Marino, Switzerland, Ukraine and Vatican City.



¹ United Nations Population Division, World Population Prospects, 2010 Revision

² Countries spanning more than one continent, in this case Europe and Asia

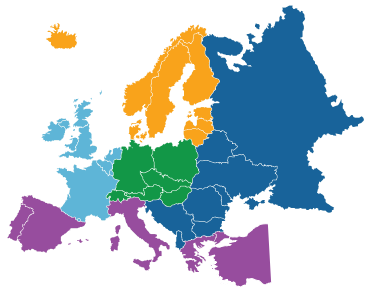


Figure 1: European countries, including EU28, Ecommerce Europe, 2013

Impact of the Ecommerce on the European Economy

The total Gross Domestic Product (GDP) of Europe in 2012 is estimated to have reached around €16 trillion, of which the GDP of the EU28 was just over 80 per cent. Ecommerce Europe estimates the share of the European Internet economy at 3.5%, a percentage that is set to double by 2016 and to triple by 2020.

The number of jobs created directly and indirectly by the B2C ecommerce sector is estimated at 2 million in Europe, a figure that will grow with the on-going increase and penetration of online in society, and the projected growth of (B2C) ecommerce.

According to data received from national ecommerce associations, Ecommerce Europe estimates the number of B2C websites to have grown to 550,000 at the end of 2012, growing at a pace of 15 to 20% per year and set to grow even more given the growth foreseen in the upcoming markets in the South and the East, where B2C ecommerce is rapidly closing the gap with the more mature markets in North, West, and Central Europe.

Postal and private operators have reaped the fruits of the impressive growth over the past years of (B2C) ecommerce. Ecommerce Europe estimates the annual number of B2C parcels sent to customers domestically and across borders to other (European) countries at 3.5 billion, a number that will certainly continue to grow with the increase forecasted for B2C ecommerce in Europe.

Ecommerce Europe's reports on B2C ecommerce 2013

European B2C Ecommerce Report 2013: €1,950

5 European regional reports 2013: €790
(including 30 Infographics and in-depth Country Profiles*)

Western Europe Report

Belgium*, France*, Ireland*, Netherlands*, Luxembourg* and United Kingdom*

Central Europe Report:

Austria*, Czech Republic*, Germany*, Hungary*, Poland*, Slovakia*, Slovenia and Switzerland*

Southern Europe Report:

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

Northern Europe Report:

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

Eastern Europe Report:

Albania, Belarus, Bosnia Herzegovina, Montenegro, Bulgaria, FYR Macedonia, Kosovo , Moldova, Romania*, Russia*, Serbia and Ukraine*

All European reports (5 regional reports + European Report): €2,950

Global B2C Ecommerce Report 2013: €2,450

Regional /continental reports: - €950 per report

North America: USA, Mexico and Canada

Latin America: Brazil, Argentina, Chile and others

Asia-Pacific: Japan, China, India, Australia, Indonesia, Vietnam, South Korea etc.

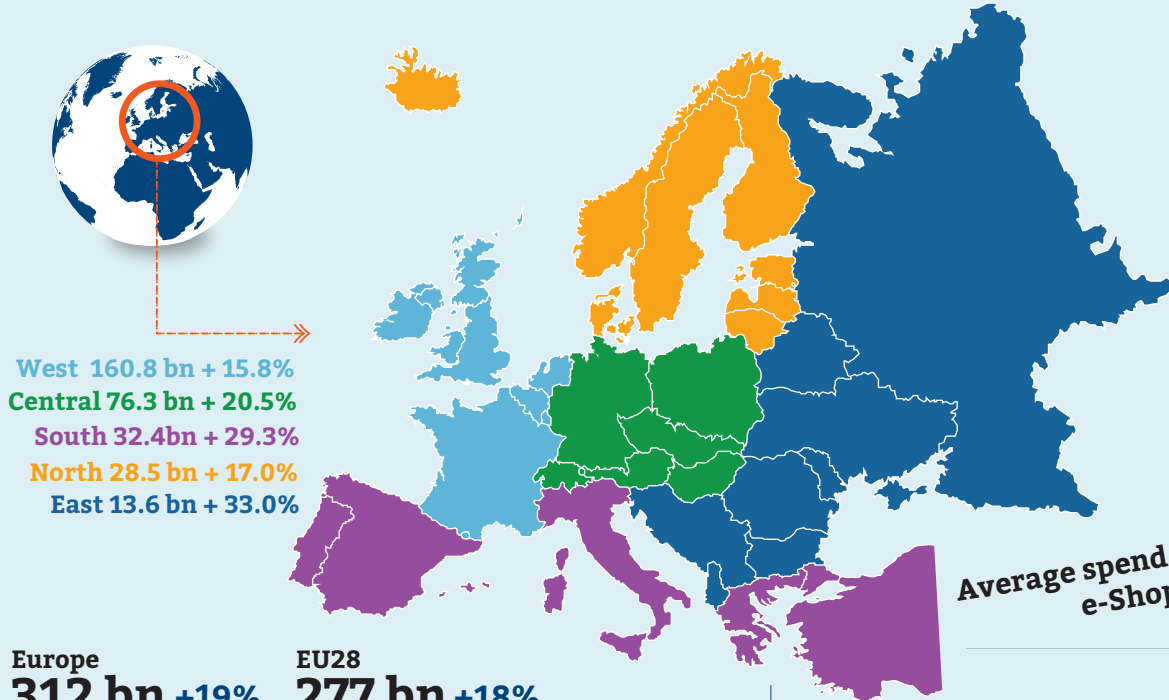
MENA REGION: Middle East and North Africa

BRIC Countries: Brazil, Russia, Indonesia, China and other economic entities

All-In-One Ecommerce Report Package: €4,950

(European and Global Report + 5 European Regional Reports + 5 Regional/Continental Reports)

Tailor-made reports are available upon request: research@ecommerce-europe.eu.



Europe **312 bn +19%**
 EU28 **277 bn +18%**
 Total B2C e-sales 2012 of goods and services

€16.0trn
 GDP 2012
 3.5% Contribution Internet Economy to GDP

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

550,000
 estimated online businesses

3.5 billion
 number of parcels annually (e)

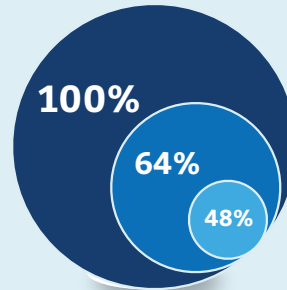
*UK, Germany, France
 61% of total e-commerce sales in Europe*

Top 5 E-commerce countries in turnover (EUR million)

	UK	96,193
	German	50,000
	France	45,000
	Spain	12,969
	Russia	10,302

Top 5 emerging countries in % growth

	Turkey	75%
	Greece	61%
	Ukraine	41%
	Hungary	35%
	Romania	33%



Average spend per e-Shopper **€1,243**

Turnover technical consumer goods on internet +9.1%

Estimated M-commerce **5.5%** (€17bn)

5% estimated share of online retail in total retail

"350 million social media users"



Europe B2C Ecommerce 2012

European B2C ecommerce is developing extremely well. In 2010 Europe overtook the USA, the biggest market in the world until then. In 2012 European B2C ecommerce, including online retail goods and services such as online travel bookings, vents and other tickets, downloads etc., grew by 19.0% to reach €311.6 bn. The EU28 reached €276.5 bn, or 88.7% of total European e-sales, a growth of 18.1%³.

SHARE EU28 OF ECOMMERCE TURNOVER IN EUROPE

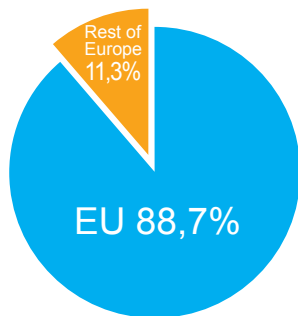


Figure 2: Share in % EU28 of ecommerce turnover in Europe.

Growth rates in mature countries such as the UK, the Netherlands, Sweden and Norway are slowing down to around 10-15%, while Germany, France, Italy and Spain are still increasing by about 20-25% and more as the number of Internet-users and shoppers continues to grow. The fastest growing and upcoming markets are those of Eastern and South-East Europe: Russia, Poland, Ukraine, Turkey and Greece where annual growth rates are expected to reach 30 to 40% and more in the next few years.

€311.6 billion



Europe's B2C ecommerce turnover in 2012

The European ecommerce industry is clearly dominated by the three leading ecommerce industries in Europe: the UK (€96 bn), Germany (€50 bn) and France (€45 bn). The total of €191 bn of these three countries together represents 61% of the total European B2C ecommerce sector and 69% of the EU28.

There are large differences in development between the mature markets in the North and the North West, and the emerging (though rapidly catching up) countries in South, Central and Eastern Europe.

Western Europe (including the UK, France, the Benelux countries and Ireland) is the European region with the highest B2C ecommerce turnover. This is due to the impact of two of the largest ecommerce economies in Europe: the UK and France. Western Europe represents €160.8 bn or 51.6% of the total European ecommerce market.

The Central European region – which includes Germany, Austria, Switzerland and Poland – is the second largest ecommerce region in Europe, with €76.3 bn or 24.5% of the European ecommerce industry. Germany sets the tone in this region as the second largest ecommerce nation of Europe.

The Southern European region surpassed the Nordic countries in 2012 and is now the third region in Europe,

61%
Share that UK, Germany and France have in the total European ecommerce industry

³ Sales for 2011 and previously have been calculated in Euro 2012 exchange rates as provided by the European Central Bank



with €32.4 bn turnover and a staggering 29.3% growth rate. Its share in the total European ecommerce market is 10.4%. Eastern Europe and Southern Europe – including Spain, Italy, Portugal, Greece and Turkey – are the two regions with the most emerging ecommerce markets.

The Northern European region – with Sweden, Denmark, Finland, Norway and the Baltic states – is now in fourth position for ecommerce size, with €28.7 bn and a 9.2% European market share.

The Eastern European region, led by Russia, has shown an impressive 32.6% growth, reaching a turnover of €13.4 bn and a 4% market share.

The following table shows the turnover of European B2C ecommerce, including goods and services, for the years 2009, 2010, 2011 and 2012 in billions of euros and the percentage growth per year:

EUROPEAN B2C ECOMMERCE TURNOVER OF GOODS AND SERVICES, IN MILLION OF EUROS AND PERCENTAGE GROWTH, 2009-2012

European Region	2009	2010	Growth	2011	Growth	2012	Growth
West	99,0	118,1	19.4%	138,8	17.5%	160,8	15.8%
Central	44,2	53,3	20.7%	63,4	18.8%	76,3	20.5%
South	16,4	20,0	21.9%	25,1	25.2%	32,4	29.3%
North	19,2	22,0	14.2%	24,9	13.3%	28,7	15.1%
East	5,7	7,5	31.3%	10,1	34.9%	13,4	32.6%
Total Europe (47)	184,5	220,9	19.7%	262,3	18.7%	311,6	18.8%
Total EU (28)	166,7	198,6	19.1%	234,1	17.9%	276,5	18.1%

TOP 5 ECOMMERCE COUNTRIES IN TURNOVER IN MILLION EUROS in 2012

	Country	e-Sales 2012
1	UK	96,193
2	Germany	50,000
3	France	45,000
4	Spain	12,969
5	Russia	10,302

TOP 5 EMERGING COUNTRIES IN PERCENTAGE GROWTH IN 2012

	Country	e-Sales 2012
1	Turkey	75%
2	Greece	61%
3	Ukraine	41%
4	Hungary	35%
5	Romania	33%

Source: Ecommerce Europe, 2013: e-sales of goods and services

Figure 3: European ecommerce turnover of goods and services, Ecommerce Europe, 2013

Internet access, (mobile) usage and spend per consumer in Europe

Internet access in Europe

According to recent research of Eurostat, the degree of Internet access varies among EU Member States, ranging from more than 90% of households in Denmark, the Netherlands, Luxembourg and Sweden, to less than 55% in Bulgaria, Romania and Greece. In 2012 there were still significant disparities in broadband take-up by households, with a rate of only around 50% of households in Bulgaria, Greece and Romania.

However, Bulgaria and Romania showed impressive recent growth. The proportion of households with broadband connections in these countries doubled between 2010 and 2012.

Between 2008 and 2012, the highest growth – more than 30% – was recorded in the Czech Republic, Romania and Slovakia.

Top 5 European countries in terms of Internet access as a percentage of the population⁴ in 2012:

1. Iceland (95%)
2. Netherlands (94%)
3. Norway (93%)
4. Luxembourg (93%)
5. Denmark (92%)

Internet usage in Europe


Internet penetration in the European Union is considerably higher compared to the total European population.

The latest number of Internet-users is estimated at 529 million for the whole of Europe, or 64.4% of the total European population.

For the European Union (EU28) the number of Internet-users is estimated at 378 million, or 75% of the population of the European Union. According to Ecommerce Europe estimates, in 2012 the number of European e-shoppers reached 250 million for the whole of Europe and 195 million in the European Union. This means around 47% of the total number of all Internet-users in Europe and 52% of all Internet-users within the European Union.

Internet usage around the world

The global number of Internet-users at the end of 2012 was estimated at around 2.4 billion⁵ and is forecast to reach close to 3.5 billion in just a couple of years, around 50% of world population. As the number of Internet-users grows and users are getting more and more confident in purchasing online, the number of e-shoppers is set to grow rapidly. According to Ecommerce Europe's estimates, the global number of e-shoppers has grown to over 1 billion, or over 40% of users⁶.

 **64%**
of all Europeans
or 529 million
Europeans users
of Internet in 2012

74.3%
of the population
in EU28 used
Internet in 2012

1 billion
Global number of
e-shoppers in 2012



Mobile Internet Usage in Europe

Mobile Internet usage has become popular with the emergence of new mobile devices such as smartphones and tablets, especially among young people. Individuals in the EU27 aged 16-74 years made slightly more use of handheld devices, including mobile or smart phones and other small Internet-enabling devices, than of portable computers (including laptops, netbooks and tablets). The proportion of young people aged 16-24 using handheld devices (47 %) for Internet access in 2012 was 7 percentage points higher than for those using portable computers (40 %). Overall, about one-third of individuals in the EU27 used mobile devices to access the Internet away from home or work. The share of mobile Internet usage by young people was – at 58% – almost five times higher than the 12% share for the population aged 55-74⁷.

According to Ecommerce Europe, m-commerce in Europe grew to €17 bn or 5.5% of total e-sales in 2012 and is set to explode in 2013. Last year – 2012 – can be seen as the first year of confirmation of the important place m-commerce will take in total ecommerce sales. Ecommerce Europe expects that 2013 will be the year of the definitive break-through of mobile and m-commerce. The fast pace of mobile commerce growth is helping to drive overall ecommerce growth by converting potential bricks-and-mortar sales to digital sales for consumers using their smartphones and tablets while shopping in-store.

Average amount spent per consumer in Europe

In 2012 the average amount spent per capita in Europe was €380, per Internet-user €589 and per e-shopper €1,243. Within the European Union the average amount spent per capita was €544, per Internet-user €732 and per e-shopper €1,413. To compare: the global average amount spent per e-shopper is estimated at around €850⁸.

Top 5 e-Spend per capita 2012

1. UK	★	€2,466
2. Norway	★	€2,225
3. Austria	★	€2,140
4. Denmark	★	€1,914
5. Switzerland	★	€1,750



Leading m-commerce country in EU, with 12% of all B2C e-sales through mobile devices

5.5%

Of all European B2C e-sales through m-commerce

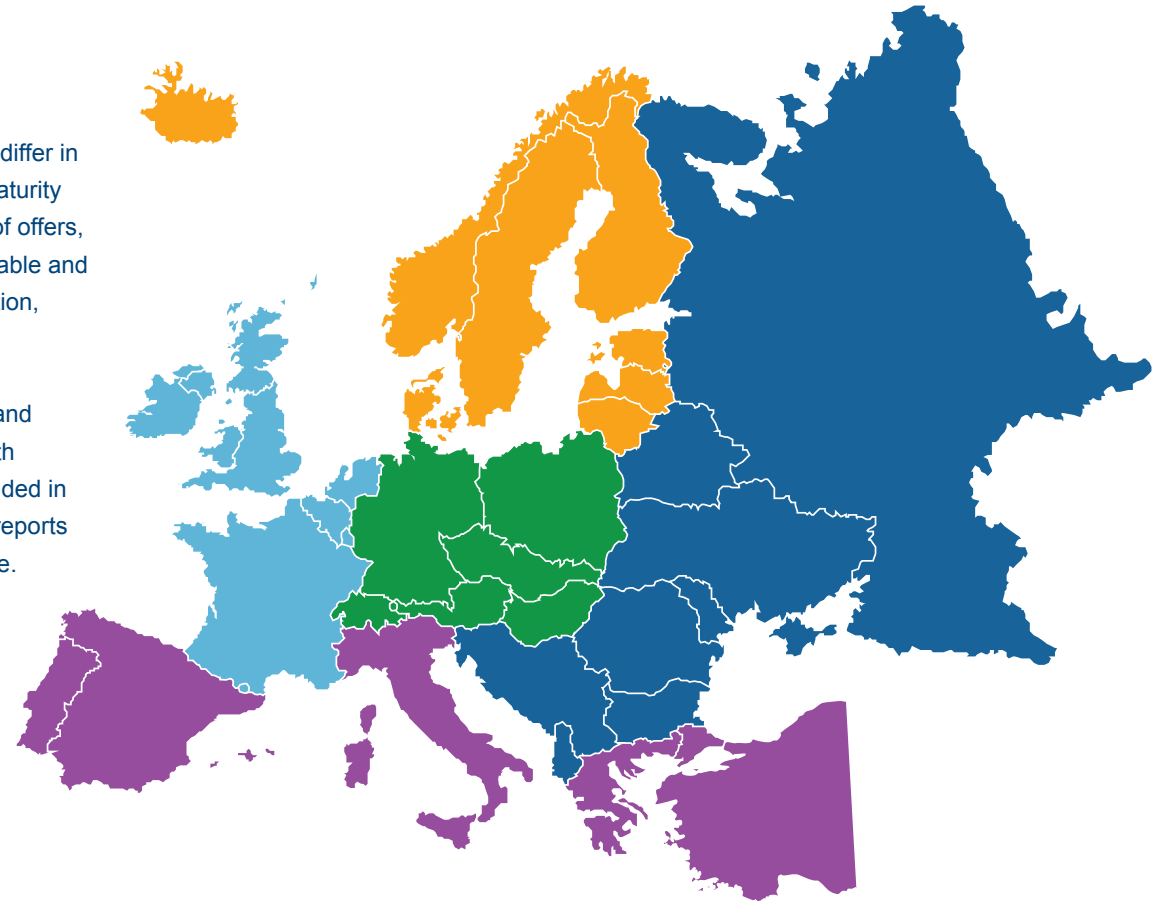
⁷ Eurostat: Survey on ICT usage in Households and by Individuals - Statistics in Focus 50/2012

⁸ Ecommerce Europe: Global B2C Ecommerce Report 2013

Mature and emerging markets in Europe

Online Internet penetration and purchasing still differ in the various parts of Europe, according to the maturity of the market, the level of trust, the availability of offers, the penetration of reliable payment options, reliable and affordable delivery, Internet-usage and penetration, and consequently, the number of e-shoppers.

The following is a brief overview of the mature and emerging countries in Europe. For more in-depth information we refer to the country profiles included in this report or to Ecommerce Europe's regional reports for North, Central, West, South and East Europe. The regional reports also contain 30+ extended Infographics of European countries.




 87%

 87% of households
have broadband
access in Denmark


With an estimated share of **11.1%**, the share of online retail goods in traditional retail is among the highest in Europe and the world



Average spent per Danish e-shopper is estimated at over **€1,900**

Northern Europe

Denmark

Denmark has 5.2 million Internet-users (92% of the total population) and 4.2 million active users (81% of the number of users). With 87% of households having broadband access, Denmark ranks fourth together with Finland on the European broadband ranking list published by Eurostat in 2012.

Close to 80% of 87% Internet-users have purchased goods or services in the last 12 months. The average annual amount spent online per Danish e-shopper is estimated at over €1,900. Compared to other European countries, the Danish online retail market is a highly mature market. In 2012 3.9 million Danes purchased online for €7.4 bn, of which an estimated 43% was on e-services, mainly online travel⁹.

The Danish economy seems to drive retail sales both offline and online. Most purchased items online (after travel) are: electronics, fashion/clothing/shoes, books, audio-books, etc., movies and music. With an estimated share of 11.1%, the share of online retail goods in traditional retail is among the highest in Europe and the world¹⁰.

For more information an Infographics of 18 countries we refer to the full Europe B2C Ecommerce 2013 Report

⁹ Estimates FDIH, the Danish ecommerce association

¹⁰ Ecommerce Europe estimates

Central Europe

Germany

With 37 million online shoppers¹¹, Germany has a well-developed market for ecommerce. Its turnover in 2012 amounted to €50 bn in total, 22% more than in 2011. The annual average amount spent per e-shopper exceeds €1,300. Online retail goods represented 6.4% of the German retail market. Items that sold best are clothing, electronics and books. Total distance selling of goods (including traditional mail-order (catalogue) sales and online retail goods) reached €37.5 bn, up 15.6%, of which the share of online retail was 70%¹².

German online sales of technical consumer goods grew 6.1% to €7,3 bn in 2012. Traditional sales grew of t.c.g grew as well to €25.3 bn (1.5% in 2012)¹³.

For more information an Infographics of 18 countries we refer to the full Europe B2C Ecommerce 2013 Report.

¹¹ BVH, German association, representing ecommerce companies

¹² BVH, February 2013

¹³ GfK

€50 billion
Turnover of online
goods and services
in Germany in 2012

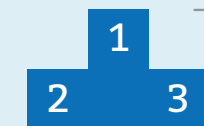


Average spent per
e-shopper

€1,300



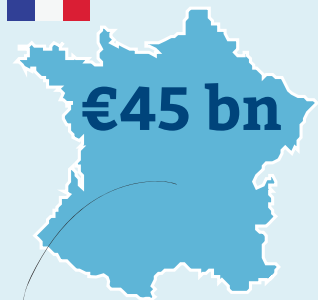
Total distance
selling of
goods reached
€37.5 bn, up
15.6%



Items that sold best
are clothing,
electronics and books.

6th nation

France is ranked sixth in the world for ecommerce sales

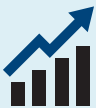


€1.420

Average spend per e-Shopper

+500%

E-shoppers growth since 2000



Internet users
52.200.000 (79%)

E-shoppers
31.700.000 (48,2%)

Facebook users
25.300.000 (38.5%)

Western Europe

France

Today France is among the leaders in ecommerce, occupying third position amid the Internet's top ten European countries. With over 50 million Internet-users, France follows Russia, Germany and the UK which hold the first, second and third positions respectively. France has 42 million active Internet-users and 31.7 million e-shoppers, reflecting 76% of the total number of active users, a growth of over 500% since 2000. French companies have reaped the rewards of rapidly growing broadband amongst already widespread coverage.

Online Sales of technical consumer goods grew with 7.0% to € 3.6 bn in 2012. Traditional sales dropped -7.4% to € 19.2 bn¹⁴.

France, with a € 45 bn turnover¹⁵, is ranked sixth in the world for ecommerce sales, preceded by the US, the UK, Japan, China and Germany. Annual amount spent per e-shopper exceeds €1,400, almost double the amount spent in 2007, just five years ago.

For more information an Infographics of 18 countries we refer to the full Europe B2C Ecommerce 2013 Report.

¹⁴ GfK

¹⁵ FEVAD. French association for ecommerce

Southern Europe

Turkey

Ecommerce is developing rapidly in Turkey. A recent report¹⁶ analysed online spending there according to the categories private shopping, deal sites, home improvement, retailers and C2C shopping. Some of the results: the largest cities consume the most; women tend to seek decoration and clothing, while men tend to seek functionality and gadgets. The general most dominant objection against shopping without being able to personally examine a product has been completely reversed.

There are currently 40 million Internet-users in Turkey (53% of the population), which puts Turkey in 14th place in the global ranking of countries with the highest number of Internet-users, just behind Iran.

Half the population is under 30 years of age and actively uses social networks. That, along with an enthusiastic fervour for business enterprise, makes Turkey the ideal country to promote ecommerce. The figures published mostly include C2C ecommerce. In 2012 total B2C e-sales had reached €5.4 billion, 75% up on 2011¹⁷

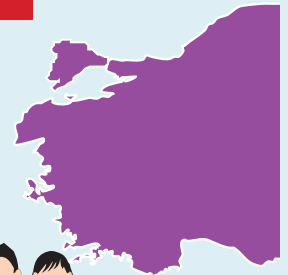
For more information an Infographics of 18 countries we refer to the full Europe B2C Ecommerce 2013 Report.

¹⁶ ETID, the Turkish e-commerce association

¹⁷ Ecommerce Europe estimates

50%

Of Turkish population is under 30 years old



40 million Internet-users



In 2012 total B2C e-sales had reached €5.4 billion





 35%

 Increase of goods and
services sold online in
Russia in 2012

 €40
million

 Internet-shop-
pers: growth
40 mn in 2015

 10,3
billion
Russian
ecommerce
market
 

Eastern Europe

Russia

The volume of the Russian ecommerce market is estimated to have reached around €10.3 bn from 7.6 billion in 2011. The market is growing at an annual rate of around 35%. The behaviour of Russian online consumers is largely a replica of buyers' steps in Western markets, though at a slower pace: half of the regular e-shoppers in Russia only started making online purchases in the last two years. Russian ecommerce has the need, the potential and the room to grow. The reasoning is the future rise in the number of Internet-shoppers in Russia: from 20 mn in 2012 to around 40 mn in 2015, and in the number of bank card-users.

One of the other reasons for the positive growth in ecommerce in Russia is the still under-developed retail infrastructure, in particular in the regions. In remote areas of this huge country there is a growing demand to have better and more direct access to original quality and fewer over-priced products. That makes the remote regions of Russia especially attractive for ecommerce.

For more information an Infographics of 18 countries we refer to the full Europe B2C Ecommerce 2013 Report

European Measurement Standard for Ecommerce (EMSEC)

EMSEC aims to provide guidelines to measure and monitor B2C ecommerce in order to enable all European countries to provide data with respect to the penetration of B2C ecommerce in a standardised way.

All Ecommerce Europe figures and estimates are based upon the EMSEC, unless otherwise noted¹⁸. The EMSEC agrees with data and research by GfK.

The EMSEC reports on sales figures for the total B2C ecommerce in Europe and in country profiles based on total sales of goods and services. Total sales of goods and services are based according to the areas/sectors/classification of areas and sectors.

All data are reported in the national currency of the country involved and are converted into euros according to the average (annual) rate of exchange as provided by the European Central Bank (ECB).

Growth rates are calculated and measured by the B2C ecommerce sales in national currency.

Definition of B2C ecommerce sales

B2C (Business-to-Consumer) ecommerce is the Internet-facilitated activity that involves transactions between businesses and consumers via either a multichannel approach using a combination of channels

such as shop, catalogue, Internet, e-mail, telephone or an online-only (pure play) approach by companies that originated – and do business – purely using the Internet as a medium without a physical (brick-and-mortar) store. B2C ecommerce transactions include goods as well as services, online sales for which payments are made “online” as well as “offline”, Value Added Tax (VAT) or other sales tax and Apps, but exclude returns and delivery costs.

Excluded from EMSEC

Online purchases of the following items are excluded from EMSEC:

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

¹⁸ At this moment not all data from all countries will be completely in line with the guidelines laid down in this document. These guidelines will contribute greatly to realizing a situation in which all data in all (member) countries is in line with these guidelines in due time.



Memberships, Partnerships, Round Tables, Reports & More

Ecommerce Europe is the association representing 4,000+ companies selling products and/or services online to consumers in Europe. Founded by leading national ecommerce associations, its mission is to advance the interests and influence of ecommerce in Europe through advocacy, communication and networking.

Who can be involved?

- 1 Ecommerce associations, voting members of Ecommerce Europe: **association membership**
- 2 Companies selling products and/or services online: **EU webshop register / company membership**
- 3 Preferred suppliers to the European ecommerce industry: **business partnership**
- 4 Organizations and NGO's related to ecommerce industry: **associative partnership**
- 5 European institutions, consumer organizations and stakeholders: **partners for dialogue**

Why get involved?

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

What's in it for B2C online retailers of goods and services?

EU Webshop Register

Cross-border webshops are B2C companies selling products and/or services online to consumers in Europe. The EU Webshop Register is open to all B2C online companies, free of charge.

Benefits EU Webshop register include:

- 1 Free registration in EU Webshop Register
- 1 Free Regional Report of your choice
- Free Ecommerce Europe Newsletter

Company Members

Ecommerce Europe Company Members are B2C companies selling products 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:

- Exclusive Ecommerce Europe Member logo for your website
- Yearly European B2C Ecommerce Report (€1,950)
- 1 Full Conference Package Global Ecommerce Summit
- 5 Regional Reports on European B2C Ecommerce (€3,950)
- Free entrance to Ecommerce Europe pre-conferences
- Free entrance to Round Table meetings in 8 European cities
- Pro-active involvement white papers and position papers
- Open to attend Ecommerce Europe Working Committee's



National Associations





Business partners

Ecommerce Europe business partners are the preferred suppliers of the European ecommerce industry.

The cost is € 8,500 per year upon balloting.

Benefits for preferred business partners include:



- Exclusive Ecommerce Europe business partner logo
- Yearly European B2C Ecommerce Report (€1,950)
- 5 Regional Reports on European B2C Ecommerce (€3,950)
- 2 Full Conference Packages Global Ecommerce Summit
- Free entrance to 3 Ecommerce Europe pre-conferences
- Free entrance to Round Table meetings in 8 European cities
- Pro-active involvement white papers and position papers

Ecommerce Europe business partners



Ecommerce Reports 2013 Around the World

Ecommerce Europe publishes various reports on B2C ecommerce around the world. Free light version downloads are available at www.ecommerce-europe.eu. Reports include country profiles, trends and Infographics.

European B2C Ecommerce Report 2013: €1,950

Regional B2C Ecommerce Reports 2013: €790

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

Global B2C Ecommerce Report 2013: €2,450

Regional / continental reports: €950

- North America: Can, Mex, USA
- Latin America: Arg, Bra, Chile, e.o.
- Asia-Pacific: Aus, Chin, Indo, Jap, SK, e.o.
- MENA Region: Middle East, North Africa
- BRIC countries: Bra, Rus, Indon, China, e.o.

All-in-One Ecommerce Report Packages

European Report + 5 Regional Reports Europe: €2,950
 European and Global Reports + 5 Regional Reports Europe + 5 Continental Reports: €4,950

Taylor-made reports are available upon request.
 Mail to: research@ecommerce-europe.eu.

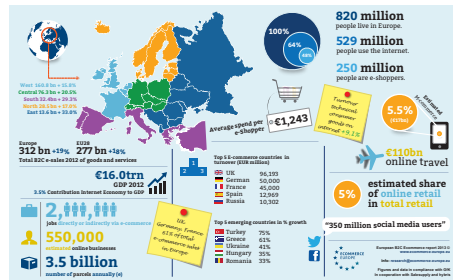


About Ecommerce Europe Reports

This Europe B2C Ecommerce Report 2013 focuses on facts, figures, trends and forecasts for Europe (including the 28EU member countries).

Ecommerce Europe also publishes 5 regional reports covering the various European regions: North, Central, West, East and South. Further, Ecommerce Europe publishes the Global B2C Ecommerce Report 2013 as well as special reports focusing on continents, regions and interesting economic entities around the world.

This European Report, the various regional reports and the Global Report focuses on facts, figures, trends and forecasts and includes Infographics and Country Profiles. Infographics are brief summaries of country profile information. All regional reports contain in-depth Country Profiles. These profiles contain an overview of the country and currency as well as of B2C ecommerce data, trends and analyses, the economic outlook and key economic indicators such as population, inflation, unemployment, gross domestic product (GDP) and comparisons of online goods sold in comparison with retail sales of goods.



Ecommerce Europe's reports on B2C ecommerce 2013

European B2C Ecommerce Report 2013- €1,950

5 European regional reports 2013: €790
 (including 30 Infographics and in-depth Country Profiles*)

Western Europe Report

Belgium*, France*, Ireland*, Netherlands*, Luxembourg* and United Kingdom*

Central Europe Report:

Austria*, Czech Republic*, Germany*, Hungary*, Poland*, Slovakia*, Slovenia and Switzerland*

Southern Europe Report:

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

Northern Europe Report:

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

Eastern Europe Report:

Albania, Belarus, Bosnia Herzegovina, Montenegro, Bulgaria, FYR Macedonia, Kosovo, Moldova, Romania*, Russia*, Serbia and Ukraine*

All European reports (5 regional reports + European Report): €2,950

Global B2C Ecommerce Report 2013: €2,450

Regional /continental reports: - €950 per report

North America: USA, Mexico and Canada

Latin America: Brazil, Argentina, Chile and others

Asia-Pacific: Japan, China, India, Australia, Indonesia, Vietnam, South Korea, etc.

MENA REGION: Middle East and North Africa

BRIC Countries: Brazil, Russia, Indonesia, China and other economic entities

All-In-One Ecommerce Report Package: €4,950

(European and Global Report + 5 European Regional Reports + 5 Regional/Continental Reports)

Tailor-made reports are available upon request: research@ecommerce-europe.eu.

About the authors



Editor: Wijnand Jongen

Wijnand Jongen MBA (1959) is managing director of Thuiswinkel.org, the sector organization for online retailing in the Netherlands. He is Vice-President and Chairman of the Executive Committee and Member of the Board of Directors of Ecommerce Europe, the association for online retailing and web merchants in Europe. He is also Chairman of the Statistics & Research Board of Ecommerce Europe.

Jongen is a member of FIRAE, the association of global retail association executives. He is Chairman of the e-Marketing & Distance Selling chair of the Erasmus University of Rotterdam. He holds office in various other executive (inter)national committees.

On 27th April 2006 Wijnand Jongen was elected DM (Direct Marketing) Man of the Year 2006 in the Netherlands.

Author: Aad Weening

Aad Weening (1941) has been involved in distance selling and retail practically all his working life. From 1966 until 1979 he worked at a professional secretariat agency offering legal and economic advice as well as lobbying services for 10 trade sectors. From 1979 he managed the Dutch Mail Order Association (today Thuiswinkel.org), where he was involved in the changes in the postal area in the Netherlands first, later also on a European level.



Between 1993 and 2006 he served as Secretary General of the European Distance Selling Trade Association (EMOTA) in Brussels. He represented the sector towards the European institutions on legal and other issues, including consumer protection and postal services.

Currently Weening is Senior Advisor for International Ecommerce at Ecommerce Europe. Weening is the author of a number of reports with respect to data and trends in B2C ecommerce, containing in-depth research of global trends and identifying markets in ecommerce.

Ciro Ferraiuolo

Ciro Ferraiuolo (1988) is working for Thuiswinkel.org and Ecommerce Europe since 2012. He has been involved in international e-commerce and contributed significantly towards the first stage developments of the Ecommerce Europe reports.

He studied International Business and Management at the Saxion University, the Netherlands, and has ever since had a great interest in the international (digital) economy. Ferraiuolo is the key researcher with respect to data and trends in B2C ecommerce, global trends and identifying markets in ecommerce.





Methodology, Acknowledgements and Sources

This report could only be realised by consulting a great many sources, available in the various countries and regions in Europe and around the globe. The wide variety of sources include public domain publications, blogs, websites, industry and financial specialist publications, regional and local news, annual reports, press releases, etc. etc. Sometimes the information sourced are contradictory. Sometimes different figures and data were given by different sources within the same country, f.e. 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 its 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, but are not limited to:

(Inter)national Associations

- Adigital (Spain)
- BeCommerce (Belgium)
- BvH (Germany)
- Ecommerce Europe
- Distansehandel Norge (Norway)
- ETID (Turkey)
- FDIH (Denmark)

- FEVAD (France)
- KAUPPA (Finland)
- National Retail Federation (USA)
- Netcomm (Italy)
- Retail Excellence (Ireland)
- Shop.org (USA)
- Sdh (Sweden)
- Slovak Association for ecommerce (Slovak Republic)
- Thuiswinkel.org (the Netherlands)
- VSV (Switzerland)

Corporate sources

Allegro Group
 A.T. Kearney
 Boston Consulting Group
 comScore
 Deloitte
 DHL
 Digital Hub Development Agency (DHDA)
 EHI Retail Institute
 ELTRUN, Athens University
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 Internet Retailing

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Digital Hub Development Agency (DHDA)
 EHI Retail Institute
 ELTRUN, Athens University
 European Commission
 Eurostat
 European Central Bank (ECB)
 European Banking Association (EBA Clearing)
 International Monetary Fund (IMF)
 International Telecommunications Union (ITU)
 Internetworldstats
 National and Central Banks
 Offices of National Statistics
 The Heritage Foundation
 United Nations (UN)
 World Factbook
 World Economic Forum
 Ystats



EUROPE B2C ECOMMERCE



Ecommerce Europe

Rue d'Accolay 15 box 6
B-1000 Brussels - Belgium
Tel: +32 (0) 2 502 31 34

Website: www.ecommerce-europe.eu

Contact us at:

info@ecommerce-europe.eu

For reports: research@ecommerce-europe.eu

Twitter: [@Ecommerce_eu](https://twitter.com/Ecommerce_eu)

