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Monthly eCommerce Pulse in Europe

A report based on the online purchases of a panel of 5M+ e-shoppers in August 2024

How is the market evolving? Which categories are driving online sales? Do heavy shoppers buy the same products as light shoppers?

September 2024 report, based on the online purchases of August 2024.
A monthly minutes to discover the latest market and consumer insights, thanks to online transactional emails collected passively, anonymised and processed in real time.
To help you get game-changing actionable consumer insights, and make the right choice at the right time.

Breaking news: The recovery of online school bag sales in 2024

+20% Growth in sales value vs 2023

+16% Increase in online shoppers vs 2023

A trend is emerging in 2024: online French consumers are moving away from second-hand items in favor of new products

Breakdown of new and second-hand purchases

	2022	2023	2024
Second-hand	25%	28%	25%
New	75%	72%	75%

Average price of a second-hand bag vs. new

	2022	2023	2024
Second-hand	21€	18€	17€
New	34€	34€	35€

Period analyzed: June - August, W23 to W35

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Online sales have increased in both value and volume compared to last year

Ecommerce growth in EU5

YTD August 2024 vs previous year

+6% value

+13% volume

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DIY, Beauty and Sports are the categories growing the most

Category mix in value

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Market share evolution August 2024 vs August 2023

	Fashion	Home & Appliances	DIY & Garden	Beauty	High tech	Food & Beverage	Near food	Culture & Games	Sports & Auto
UK	22%	13%	7%	9%	15%	16%	4%	7%	7%
Germany	22%	16%	10%	7%	19%	6%	3%	7%	10%
France	15%	16%	8%	5%	20%	18%	4%	6%	8%
Italy	18%	13%	8%	9%	26%	5%	4%	9%	8%
Spain	17%	14%	8%	7%	26%	8%	4%	7%	9%

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The weight of refurbished & second-hand items on total eCommerce remains quite stable

Share of second-hand in value

in August 2024

12% of purchases within the high-tech category are refurbished

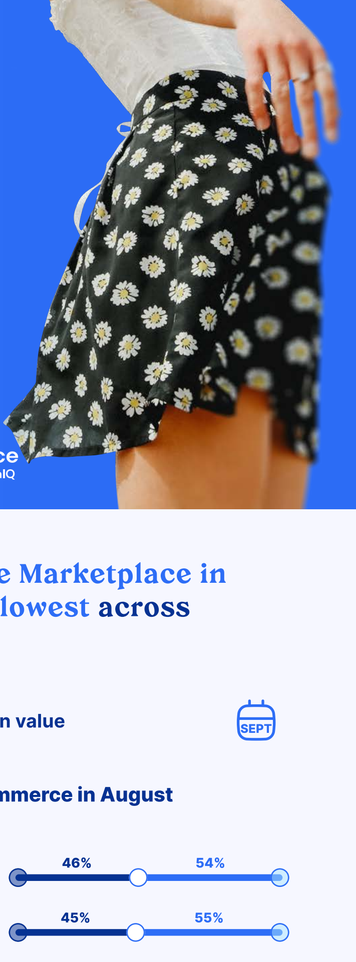
9% of second-hand purchases within the fashion category

New / Refurbished in total eCommerce*

New vs. second-hand

	New	Second-hand
EU5	93%	7%
France	89%	11%
UK	92%	8%
Germany	96%	4%
Italy	95%	5%
Spain	94%	6%

*excluding food



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In France, the weight of the Marketplace in total eCommerce is the lowest across Europe

Share of Marketplace in value

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Marketplace (3P) / Retail (1P) in total eCommerce in August

	Marketplace (3P)	Retail (1P)
EU5	41%	59%
France	32%	68%
UK	40%	60%
Germany	46%	54%
Italy	45%	55%
Spain	42%	58%

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Among heavy, medium & light shoppers, High-Tech & Fashion are losing momentum

Top categories by shopper profile

Market share + evolution August 2024 vs August 2023

	Heavy shoppers		Medium shoppers		Light shoppers	
1	High Tech	20%	High Tech	24%	Fashion	24%
2	Fashion	16%	Fashion	18%	High Tech	22%
3	Home	15%	Home	14%	Home	11%

Heavy shoppers: Top 20% of online shoppers who spend the most — Medium shoppers: Following 30% — Light shoppers: Remaining 50%

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Samsung breaks into the Top 10 in Italy

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Top 10 retailers on heavy shoppers

Market share evolution vs. last month (LM) | last year (LY)

	UK	France	Germany	Italy	Spain
1	Amazon	Amazon	Amazon	Amazon	Amazon
2	eBay	Leclerc	Otto	Zalando	El Corte Ingles
3	Asda	Ikea	eBay	eBay	Aliexpress
4	Tesco	Vinted	Zalando	Temu	PcComponentes
5	Asos	Carrefour	Temu	Vinted	Mercadona
6	Next	Intermarché	MediaMarkt	MediaWorld	MediaMarkt
7	Tiktok	Leroy Merlin	Ikea	Unieuro	Temu
8	Argos	Auchan	H&M	Ikea	Ikea
9	Vinted	Super U	Asos	Samsung	Shein
10	Ocado	Boulanger	About You	Aliexpress	Wallapop

Heavy shoppers Top 20% of online shoppers who spend the most

Medium shoppers Following 30%

Light shoppers Remaining 50%

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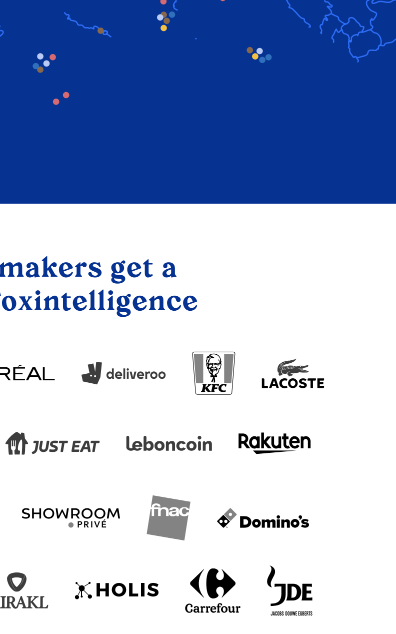
What the Fox?

Ecommerce Intelligence. Reinvented.

We help digital brands grow with technology backed market research, based on a community of millions of real consumers sharing their online transactions.

All of this data available in real time in a SaaS platform

- Rely on the full view of Ecommerce
- Leverage the best online consumer panel
- Grow your market share with actionable consumer insights



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