NIQ *Digital Purchases*

FEV

Monthly eCommerce Pulse in Europe

A report based on the online purchases of a panel of 5M+ e-shoppers in January 2025

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

February 2025 report, based on the online purchases of January 2025.
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.

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

Ecommerce growth in EU10

YTD January 2025 vs previous year

+7%
value

+9%
volume

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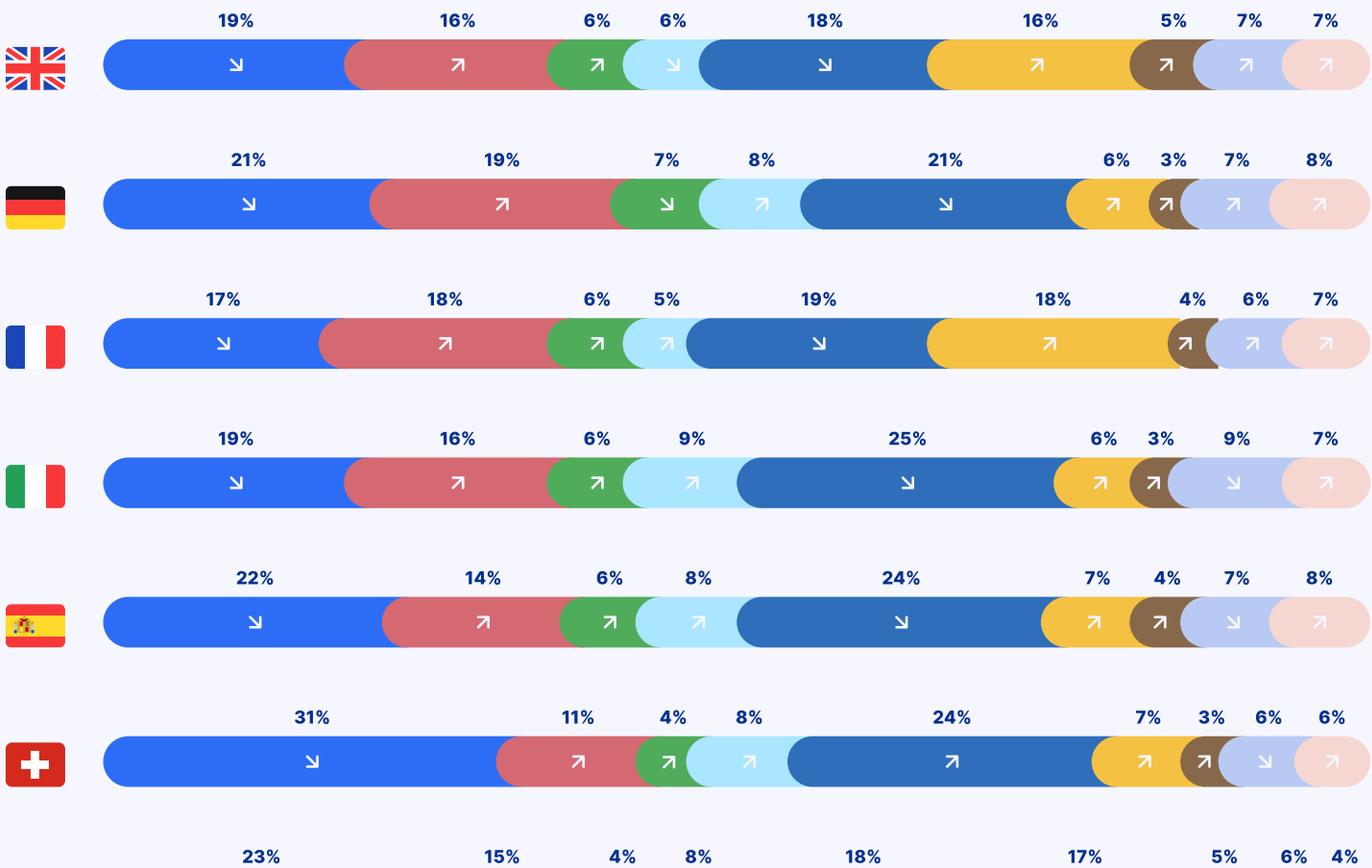
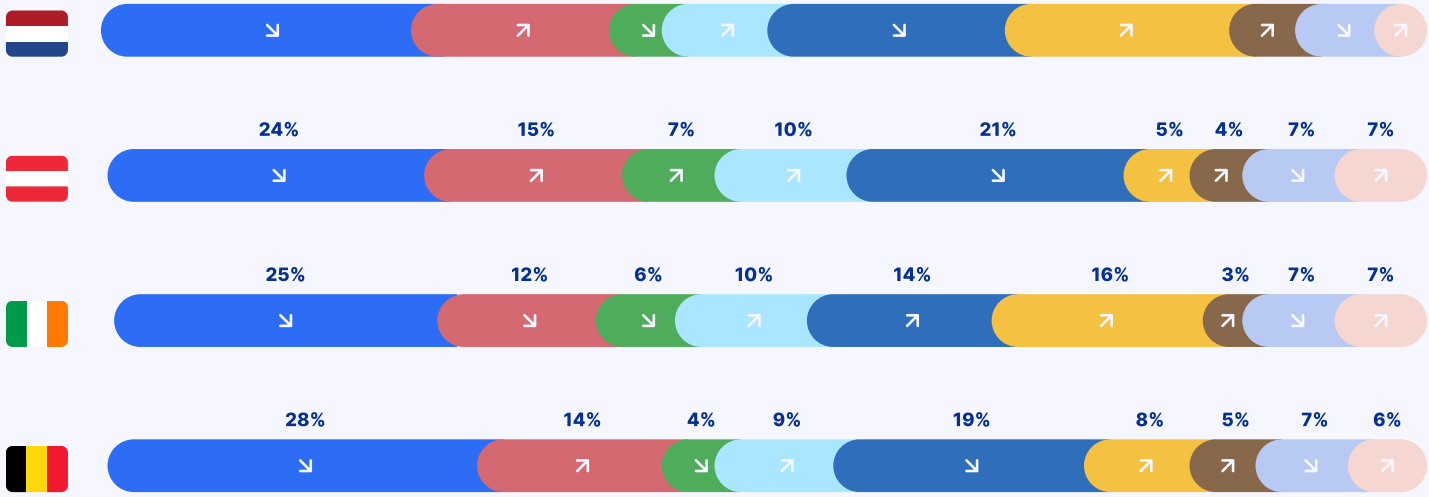
The fashion category is losing ground accross all countries, while Beauty, Food & Beverage, and Near Food categories are growing

Category mix in value

FEB

↗ → ↘ Market share evolution January 2025 vs January 2024





Fashion | Home & Appliances | DIY & Garden | Beauty | High tech | Food & Beverage | Near food | Culture & Games | Sports & Auto

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French e-shoppers remain the most inclined to favor second-hand purchases, followed by the British

Share of second-hand in value

in January 2025

11%

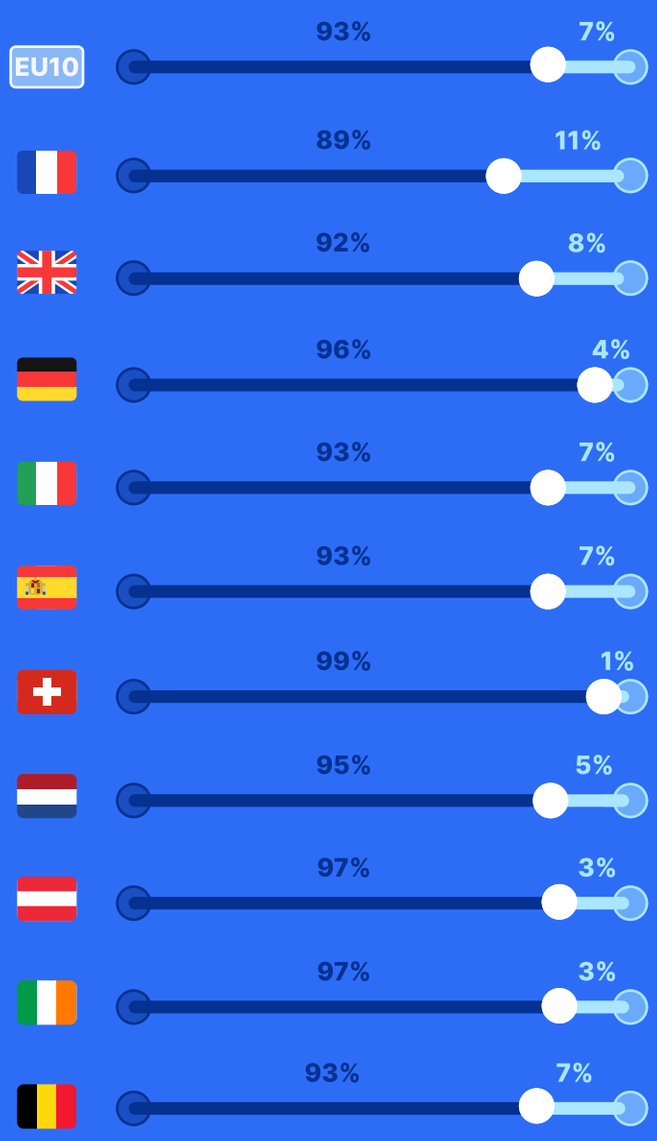
of purchases within the high-tech category are refurbished

10%

of second-hand purchases within the fashion category

New Refurbished in total eCommerce*

New vs. second-hand



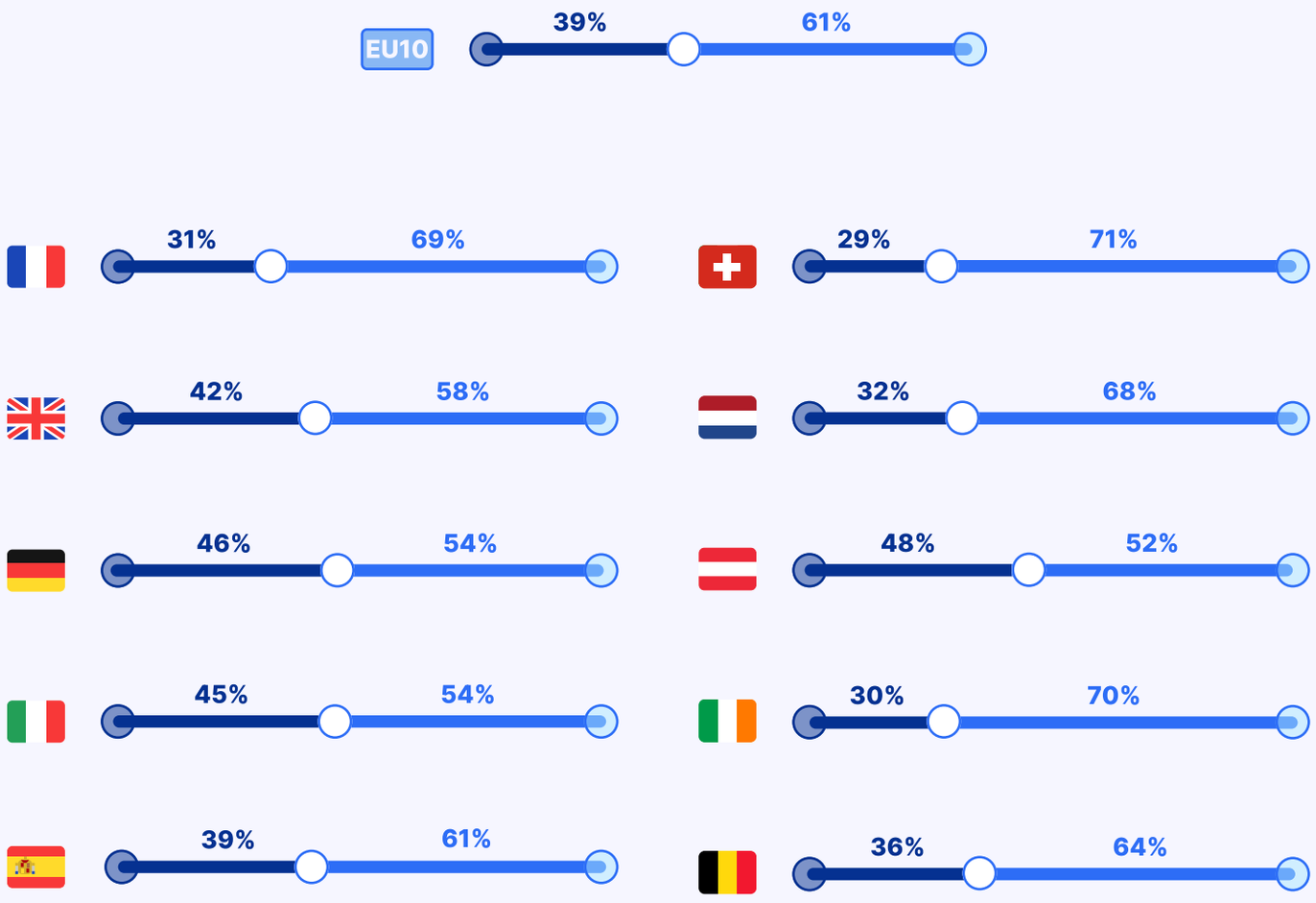
*excluding food

German and Austrian eshoppers are the most enthusiastic about marketplaces

Share of Marketplace in value

FEB

Marketplace (3P) Retail (1P) in total eCommerce in January



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The High-Tech and Fashion sectors are losing momentum, while the Home sector is gaining traction

Top categories by shopper profile

↗ → ↘ Market share + evolution January 2025 vs January 2024

Heavy shoppers			Medium shoppers			Light shoppers		
1	High Tech	20%	1	High Tech	23%	1	Fashion	25%

2	Fashion	19%	2	Fashion	21%	2	High Tech	20%
3	Home	17%	3	Home	16%	3	Home	13%
Top 20% of online shoppers who spend the most			Following 30%			Remaining 50%		

Temu is gaining market share among heavy shoppers in 7 out of 10 countries

JAN

Top 10 retailers on heavy shoppers

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

Amazon ↘ LM ↘ LY	Amazon ↘ LM ↗ LY	Amazon ↘ LM ↘ LY	Amazon ↘ LM ↘ LY	Amazon ↘ LM ↘ LY
eBay ↗ LM ↘ LY	Leclerc ↗ LM ↘ LY	Otto ↗ LM ↗ LY	Vinted ↗ LM ↗ LY	El Corte Ingles ↗ LM ↗ LY
Tiktok ↗ LM ↗ LY	Vinted ↗ LM ↗ LY	eBay ↗ LM → LY	Zalando ↘ LM ↘ LY	Aliexpress ↗ LM ↘ LY
Asda ↗ LM ↘ LY	Carrefour ↗ LM ↘ LY	Zalando ↗ LM ↘ LY	eBay ↗ LM ↗ LY	PcComponentes ↗ LM ↗ LY
Tesco ↗ LM ↘ LY	Ikea ↗ LM ↗ LY	Media Markt ↘ LM ↗ LY	Samsung ↗ LM ↗ LY	Zara ↗ LM ↘ LY
Samsung ↗ LM ↗ LY	Fnac ↘ LM ↗ LY	Temu ↗ LM ↘ LY	Media World ↘ LM ↗ LY	Media Markt ↘ LM ↗ LY
Argos ↘ LM ↗ LY	Intermarché ↗ LM ↗ LY	Ikea ↗ LM ↘ LY	Unieuro ↗ LM ↗ LY	Mercadona ↗ LM ↗ LY

Vinted ↗ LM ↗ LY	Leroy Merlin ↗ LM ↗ LY	H&M ↗ LM → LY	Zara ↗ LM → LY	Ikea ↗ LM ↗ LY
Next ↘ LM ↘ LY	Super U ↗ LM ↗ LY	Asos ↗ LM ↘ LY	Ikea ↗ LM ↗ LY	Samsung ↗ LM ↘ LY
Asos ↘ LM ↘ LY	Auchan ↗ LM ↘ LY	Baur ↗ LM ↗ LY	Temu ↗ LM → LY	Zalando → LM → LY

Zalando ↘ LM ↘ LY	Bol ↘ LM ↘ LY	Amazon ↘ LM ↘ LY	Amazon ↘ LM ↘ LY	Zalando ↗ LM ↘ LY
Galaxus ↘ LM ↗ LY	Ah ↗ LM ↗ LY	Zalando ↗ LM ↘ LY	Tesco ↗ LM ↗ LY	Bol ↘ LM ↘ LY
Digitec ↗ LM ↗ LY	Picnic ↗ LM ↘ LY	Media Markt ↘ LM ↗ LY	Dunnes Grocery ↗ LM ↗ LY	Amazon ↘ LM ↘ LY
Temu ↗ LM ↗ LY	Zalando ↗ LM ↘ LY	Temu ↗ LM → LY	Shein ↗ LM ↗ LY	Colruyt ↘ LM ↘ LY
Amazon ↗ LM ↗ LY	Media Markt ↗ LM ↗ LY	H&M ↗ LM ↗ LY	Temu ↗ LM ↗ LY	Vinted ↗ LM ↗ LY
Brack ↗ LM ↗ LY	Coolblue ↘ LM ↘ LY	RedCare ↗ LM ↗ LY	Next ↘ LM ↗ LY	Coolblue → LM ↗ LY
Migros ↗ LM ↘ LY	Amazon ↘ LM ↗ LY	Ikea → LM ↘ LY	Ikea ↗ LM ↗ LY	Temu ↗ LM ↘ LY
Coop ↗ LM ↘ LY	Vinted ↗ LM ↗ LY	Best Secret ↘ LM ↘ LY	Harvey Norman ↗ LM ↗ LY	Media Markt ↗ LM ↘ LY
Ikea ↗ LM ↗ LY	Wehkamp ↘ LM ↘ LY	XXX Lutz ↗ LM ↗ LY	Supervalu ↗ LM → LY	Ikea ↗ LM ↗ LY
Best Secret ↗ LM ↗ LY	Temu ↗ LM ↘ LY	Samsung ↗ LM ↘ LY	Apple ↘ LM ↗ LY	Krefel ↗ LM ↗ LY

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

Medium shoppers
Following **30%**

Light shoppers
Remaining **50%**

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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

10K+ decisions makers get a head start with NIQ Digital Purchases

asos, Burger King, Leroy Merlin, Darty, L'Oréal, deliveroo, KFC, Lacoste, BackMarket, Kingfisher, Sephora, Just Eat, Leboncoin, Rakuten, Superdrug, Maisons du Monde, Electrolux, Showroom Privé, fnac, Domino's, boulanger, AliExpress, Pyxis Bain & Company, Mirakl, Holis, Carrefour, JDE Jacobs Douwe Egberts

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