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JULY

Monthly eCommerce Pulse in Europe

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

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

July 2024 report, based on the online purchases of June 2024.
A monthly minutes to discover the latest market and consumer insights, thanks to online transaction 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: Amazon, Vinted, and Temu Emerge as Europe's Top Marketplace Trio

Top 5 Largest Marketplaces in Europe - L12M

Germany	UK	France	Netherlands	Belgium	Italy	Spain
amazon	amazon	amazon	bol.	bol.	amazon	amazon
ebay	ebay	Vinted	TEMU	amazon	ebay	AliExpress
zalando	Vinted	leboncoin	Vinted	zalando	Vinted	TEMU
OTTO	TEMU	BackMarket	amazon	TEMU	TEMU	wallapop
TEMU	TikTok	AliExpress	zalando	Vinted	zalando	Vinted

Amazon's marketplace grows +3 points on average across countries

	2022	2023	2024
UK	64%	66%	68%
Germany	61%	63%	67%
Italy	52%	55%	58%
France	51%	54%	57%
Spain	52%	54%	57%

Weight of the Marketplace Model at Amazon – EU5

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

Ecommerce growth in EU5

YTD June 2024 vs previous year

+6% value

+12% volume

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In France, the category mix is driven by the Food and Beverage category

Category mix in value

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↗ → ↘ Market share evolution June 2024 vs June 2023

	Fashion	Home & Appliances	DIY & Garden	Beauty	High tech	Food & Beverage	Near food	Culture & Games	Sports & Auto
UK	23% ↘	12% ↘	9% ↘	9% ↗	15% ↘	16% ↗	4% ↗	6% ↘	6% ↗
Germany	25% ↘	14% ↗	11% ↘	7% ↗	18% ↗	5% ↗	4% ↗	6% ↘	10% ↗
France	17% ↘	14% ↘	9% ↘	6% ↗	17% ↗	20% ↗	4% ↗	6% ↘	7% ↗
Italy	20% ↘	13% ↗	8% ↗	10% ↗	23% ↘	7% ↗	4% ↗	7% ↘	8% ↗
Spain	21% ↘	13% ↗	8% ↗	8% ↗	24% ↘	8% ↗	4% ↗	7% ↘	7% ↗

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

Share of second-hand in value

in June 2024

11% of purchases within the high-tech category are refurbished

8% of second-hand purchases within the fashion category

New / Refurbished in total eCommerce*

New vs. second-hand

	New	Second-hand
EU5	94%	6%
France	89%	11%
UK	93%	7%
Germany	97%	3%
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 June

	Marketplace (3P)	Retail (1P)
EU5	40%	60%
France	31%	69%
UK	40%	60%
Germany	47%	53%
Italy	47%	53%
Spain	41%	59%

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Food, Beverage, and Home categories are the only ones showing growth

Top categories by shopper profile

↗ → ↘ Market share + evolution June 2024 vs June 2023

	Heavy shoppers		Medium shoppers		Light shoppers	
1	Fashion	18%	High Tech	21%	Fashion	27%
2	High Tech	17%	Fashion	20%	High Tech	19%
3	Food, Beverage	16%	Home	13%	Home	10%
	Top 20% of online shoppers who spend the most		Following 30%		Remaining 50%	

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Shein Breaks into the Top 10 in Italy and Spain

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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
Amazon ↗ LM ↗ LY	Amazon ↗ LM ↗ LY	Amazon ↗ LM ↘ LY	Amazon ↗ LM ↘ LY	Amazon ↘ LM ↘ LY
eBay ↘ LM ↘ LY	Leclerc ↘ LM ↘ LY	Zalando ↗ LM → LY	eBay ↗ LM ↗ LY	Aliexpress ↗ LM ↗ LY
Tesco ↘ LM ↗ LY	Vinted ↘ LM → LY	Otto ↘ LM ↘ LY	Zalando → LM ↘ LY	El Corte Ingles ↘ LM ↘ LY
Asos → LM ↘ LY	Carrefour ↘ LM ↘ LY	eBay ↗ LM ↘ LY	Vinted ↘ LM ↗ LY	Zara ↗ LM ↗ LY
Asda ↘ LM ↘ LY	Ikea ↘ LM ↗ LY	MediaMarkt ↗ LM ↘ LY	MediaWorld ↘ LM ↗ LY	Mercadona → LM ↗ LY
Next → LM → LY	Leroy Merlin ↘ LM ↗ LY	Temu → LM ↗ LY	Temu → LM ↗ LY	PcComponentes → LM ↗ LY
Argos ↘ LM ↘ LY	Auchan → LM ↘ LY	H&M ↗ LM ↘ LY	Esselunga ↘ LM ↘ LY	MediaMarkt → LM ↗ LY
Ocado ↗ LM ↗ LY	Intermarché ↘ LM → LY	Asos ↗ LM ↘ LY	Unieuro ↘ LM → LY	Shein ↗ LM ↗ LY
Vinted ↘ LM ↗ LY	Zalando ↗ LM ↘ LY	Ikea → LM ↗ LY	Ikea ↗ LM ↗ LY	Temu ↘ LM ↗ LY
Very → LM → LY	Veepee ↗ LM ↗ LY	About You ↘ LM ↘ LY	Shein ↗ LM ↗ LY	Ikea ↘ 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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What the Fox?

Ecommerce Intelligence. Reinvented.

Uber Eats 30,09€ Man 20-25 y.o.
Amazon 52.50€ Woman 40-45 y.o.
Steam 19.99€ Man 25-30 y.o.
Ebay 42€ Man 25-30 y.o.
Leboncoin 150€ Woman 30-35 y.o.
Uber 24.64€ Woman 25-30 y.o.

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 Foxintelligence

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, MIRAKL, HOLIS, Carrefour, JDE

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