

Germany Is Western Europe's Second-Largest Ecommerce Market, Behind the UK

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eMarketer Editors

Germany is already taking its place as a regional ecommerce powerhouse, thanks to its large population, excellent infrastructure and generally high standard of living.

"For consumers and retailers, any fundamental doubts about the viability of online buying and selling are long past," said Karin von Abrams, principal analyst at eMarketer and author of our recent "[Germany Ecommerce 2019](#)" report.

When it comes to the number of ecommerce buyers and average annual spend per buyer, Germany ranks above the European average, according to PostNord. (PostNord delivers mail to individuals and businesses in Denmark and Sweden, and also provides logistics solutions to business customers in the Nordic region.) However, in its report, "Ecommerce in Europe 2018," PostNord calculated that the growth rate in digital buyers since 2014 was less than half the European average, at just 11%. This reflects the online data sharing and digital transaction security concerns that many consumers in Germany still have.

Research firms agree that within Europe, Germany is second only to the UK in the value of business-to-consumer (B2C) ecommerce sales. For example, a study by Cross-Border Commerce Europe, a community and knowledge platform focused on cross-border retail, estimated UK ecommerce sales in 2018 at €165 billion (\$195 billion), compared with €98 billion (\$116 billion) in Germany and €84 billion (\$99 billion) in France.

Top 5 Countries in Europe, Ranked by B2C Ecommerce Sales, 2018

billions of €



Note: including cross-border sales; total in EU-16=€518 billion; total in EU-28=€600 billion

Source: Cross-Border Commerce Europe, "Top 500 Cross-Border Retail Europe" as cited in press release, March 14, 2019

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Retail ecommerce sales are rising much faster than brick-and-mortar sales. According to a February 2019 GfK report on retail in Germany, total retail sales volume for stationary stores would reach €423.1 billion (\$499.3 billion) in 2019, an increase of €3.4 billion (\$4.0 billion) — 0.8% higher than last year.

By contrast, Handelsverband Deutschland (HDE) estimated retail ecommerce growth in 2018 at 9.1%, and projected 2019 retail ecommerce sales at €57.8 billion (\$68.2 billion), a gain of 8.5%.

Greater spend per digital buyer is one factor in market expansion at this point. HDE calculated that digital buyers spent 7% more, on average, in 2018 than in the previous year. Greater numbers of online buyers are another aspect; HDE pointed to a sharp rise (11%) in the number of digital buyers ages 60 and older, in particular.

Because of the older skew of Germany's population, it will take time for Germany's digital shopping and buying behavior to mirror that of the UK and elsewhere. "Even if young consumers generally buy online more than older consumers, this will change over time," said Håkan

Ericsson, president and group CEO, in the PostNord report. “As people with established e-buying habits grow older, the digital generation gap of today will gradually disappear.”

But that won't happen anytime soon. According to a study by online platform Picodi, fewer than one-quarter of online shoppers in Germany were ages 45 and older. This compared with 24% of 18- to 24-year-olds and 36% of 25- to 34-year-olds. A further 22% of digital shoppers were ages 35 to 44. The spending power of that oldest cohort is a very positive indicator for the future of Germany's ecommerce market.

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Report by Karin von Abrams Jun 27, 2019

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