Key e-commerce figures 2022

Federation of e-commerce and distance selling
While 2020 was the year that rocked e-commerce forecasts and triggered huge increases, 2021 saw activity plateau and consumers stick to new purchasing habits. In 2021, more French people made online purchases, and the number of online shoppers using mobile devices to make purchases broke through the +50% mark. Alongside this, consumers’ concerns over the pandemic and the environment bolstered the trend for users buying local online, as well as secondhand purchases.

**E-COMMERCE SALES**

The e-commerce sector continued to grow in 2021 (+15%), buoyed by an acceleration in product sales, and sales in transport, tourism, and leisure picking back up from Q2 2021 on. Despite business returning to normal, the leisure sector still lagged compared to pre-Covid sales. Product sales retained the lion’s share of global e-commerce sales despite dropping three points compared to 2020.

**€129.1bn**

+15.1% compared to 2020

(+24.9% compared to 2019)

**E-COMMERCE SALES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Products</th>
<th>Services</th>
<th>Growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>46.9</td>
<td>56.4</td>
<td>+14.3%</td>
</tr>
<tr>
<td>2018</td>
<td>62.1</td>
<td>50.1</td>
<td>+13.4%</td>
</tr>
<tr>
<td>2019</td>
<td>66.7</td>
<td>62.3</td>
<td>+11.6%</td>
</tr>
<tr>
<td>2020</td>
<td>46.9</td>
<td>56.4</td>
<td>+8.5%</td>
</tr>
<tr>
<td>2021</td>
<td>62.3</td>
<td>62.3</td>
<td>+15.1%</td>
</tr>
</tbody>
</table>

Growth rate

E-commerce sales in billions of Euros

Source: Fevad iCE.

**2.14 billion**

Online transactions in 2021

+16.0% compared to 2020

(+22.7% compared to 2019)

Source: Fevad iCE.

**PRODUCTS AND SERVICES**

+7% on products

(+42% compared to 2019)

+24% on service (+11% compared to 2019) of which +44% on transport, tourism, and leisure activities (-16% compared to 2019)

Source: Fevad iCE.

**E-COMMERCE SHARE OF RETAIL**

E-commerce accounts for 14.1% of all product retail sales, an 0.7 point increase on 2020. While e-commerce’s market share rocketed in 2020, in 2021 it returned to its pre-pandemic growth rate. In some categories, e-commerce’s market share stabilized as the sanitary context improved and in-store sales could resume.

<table>
<thead>
<tr>
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<tr>
<td>2019</td>
<td>46.9</td>
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<tr>
<td>2021</td>
<td>66.7</td>
<td>14.1%</td>
</tr>
</tbody>
</table>

Sales in billions of Euros

Share of the retail market

Sources: Fevad and INSEE.

**E-COMMERCE SALES AND ONLINE MARKET SHARES BY SECTOR**

<table>
<thead>
<tr>
<th>Sector</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIGH-TECH HOME EQUIPMENT</td>
<td>33%</td>
<td>ND</td>
</tr>
<tr>
<td>TOYS</td>
<td>4.7</td>
<td>32%</td>
</tr>
<tr>
<td>HOUSEHOLD APPLIANCES</td>
<td>2.5</td>
<td>25%</td>
</tr>
<tr>
<td>NEW PHYSICAL CULTURAL PRODUCTS</td>
<td>24%</td>
<td>ND</td>
</tr>
<tr>
<td>CLOTHING</td>
<td>5.7</td>
<td>21%</td>
</tr>
<tr>
<td>FURNITURE</td>
<td>3.02</td>
<td>18%</td>
</tr>
<tr>
<td>FAST-MOVING CONSUMER GOODS</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Sales in billions of Euros

Source: GfK for cultural goods (consumer panel) and household equipment; The NPD Group – Consumer panel from January through to September for toys; press release dated 12 January 2021; IFM for clothing; IPEA for furniture; NielsenIQ Homescan (consumer panel) for FMCG.
**E-SHOPPERS, M-SHOPPERS**

Following a year that saw the number of e-shoppers skyrocket, 2021 and the second year of the pandemic was about customer retention, in which the number of buyers continued to rise more gradually (41.8 million, of which +153,000 compared to 2020). Today, all customer profiles widely engage in online shopping, and almost all Internet users in the 25- to 34-year-old category and high-income professionals now shop online. A tipping point has been reached in m-commerce: +50% of e-shoppers use their mobile devices to make their purchases.

98% of e-shoppers are happy with the purchases they have made online over the past 12 months. 
Source: Fevad/Médiamétrie feedback, November 2021.

41.8 million
French people buy online (+153,000 compared to 2020)
80% of online users
Source: Médiamétrie - Internet usage observatory for Q4 2021. Base: overall online users over the past few months aged 11+ years.

### ONLINE SHOPPERS PROFILE

<table>
<thead>
<tr>
<th>% of shoppers per online user target</th>
<th>Men</th>
<th>Women</th>
<th>11-14 years</th>
<th>15-24 years</th>
<th>25-34 years</th>
<th>35-49 years</th>
<th>50-64 years</th>
<th>65+ years</th>
<th>Higher income professionals</th>
<th>Lower income professionals</th>
<th>Not in employment</th>
<th>Greater Paris area</th>
<th>Outside Paris</th>
<th>Overall/Across France</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>81.2%</td>
<td>79.5%</td>
<td>37.0%</td>
<td>84.9%</td>
<td>91.7%</td>
<td>89.3%</td>
<td>80.8%</td>
<td>71.6%</td>
<td>94.8%</td>
<td>80.7%</td>
<td>72.0%</td>
<td>82.7%</td>
<td>79.8%</td>
<td>80.3%</td>
</tr>
</tbody>
</table>

### REGIONAL PENETRATION

80.3% of shoppers per online user target

Across France

### MULTI-SCREEN SHOPPING

46% Multi-screen e-shoppers (+5 pts vs. 2020)

Top three screens used

1. **Computer** 78% (-11 pts vs. 2020)
2. **Mobile** 59% (+16 pts vs. 2020)
3. **Tablet** 17%

Source: Médiamétrie - Internet usage observatory for Q4 2021.
Base: overall online users over the past few months aged 11+ years.

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Base: overall online users over the past few months aged 11+ years.

Source: Fevad/Médiamétrie feedback, January 2022.

**22.3M**
French people make purchases on their mobile devices (53.3% of all shoppers)
Source: Médiamétrie - Internet usage observatory for Q4 2021.
**E-commerce Business to consumer**

In 2021, the pandemic pushed French people to buy more online (one online purchase per shopper per week on average in 2021). The average purchase value rose in 2020 after eight consecutive years of falling, and dropped slightly in 2021 but remained higher than pre-pandemic levels.

52% of online users have made a purchase over the past month

69% of online users have made a purchase over the past three months (vs. 67% in Q4 2020)

6.2 online transactions on average per month (vs. 3.7 per month in 2020)

and €3,100 per shopper over the year (vs. €2,700 in 2020)

**TOP 15 PRODUCTS AND SERVICES PURCHASED IN % of e-shoppers**

- Fashion/clothing: 60%
- Cultural products: 47%
- Games/toys: 45%
- Footwear: 45%
- Hygiene/beauty: 43%
- Home, décor: 36%
- Tech/household/appliances: 35%
- Textiles/household linens: 33%
- Food & drink: 33%
- Trips away: 32%
- Travel tickets: 32%
- Online gaming: 26%
- Music, books, online videos: 26%
- DIY, gardening: 25%
- Jewelry/watches: 24%

**TOP FIVE E-COMMERCE SITES IN TERMS OF PENETRATION**

1. Amazon: 52.1%
2. Cdiscount: 22.6%
3. Fnac: 19.9%
4. E.Leclerc: 17.8%
5. Decathlon: 17.4%

**SALES GENERATED BY MARKETPLACES FOR THIRD-PARTY ACCOUNTS HAVE BEEN INCLUDED IN THE FIGURES FOR THE WEBSITE THAT HOSTS THE MARKETPLACE.**

**MARKET PLAYERS**

The number of active shopping platforms continued to increase in 2021 at the same pace as 2020: +11% over a year. From the beginning of the pandemic, many brands with stores continued efforts to digitalize by rolling out online sales platforms, and this trend continued over 2021.

**BREAKDOWN OF E-COMMERCE ACTIVITY BY SIZE OF ONLINE SHOPPING PLATFORMS**

| Sales generated by marketplaces for third-party accounts have been included in the figures for the website that hosts the marketplace. Source: Fevad ICE Q4 2021. |

**FREQUENCY OF PURCHASING, PRODUCTS AND SERVICES PURCHASED**

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E-COMMERCE TO PHYSICAL STORES, SHORT CHANNELS, AND LOCAL STORES

E-shoppers continued to tap into the full diversity of offers available to buy online, in particular the acceleration in physical stores, short channels, and local stores going digital. New online shopping behaviors and buyers’ push to shop more responsibly and support local businesses have been a boon for short channels and local stores. This has been particularly true for food companies and restaurants, with e-shoppers jumping on their omni-channel offerings.

**MARKETPLACES**

Marketplaces continued to bring in business for third-party sellers, and in particular micro-businesses and SMEs that were still reeling from the effects of the pandemic in 2021. Sales made on the marketplaces offered up by iCE100 leaders saw 5% growth vs. 2020, and a 33% rise vs. 2019.

**MARKETPLACE BUSINESS VOLUME**

14.4% of business volume for iCE100 product sales

Fevad

+5% compared to 2020

(+33% compared to 2019)

Source: Fevad iCE, Médiamétrie feedback, January 2022.

36% of online sellers sell their products on third-party marketplaces

Source: Fevad/LSA/Opinionway feedback, March 2022.

**USING MARKETPLACES**

RETAIL

29% of legal businesses sell online

6% sell on one or several marketplaces

WHOLESALE

23.5% of legal businesses sell online

30% sell on one or several marketplaces

HOSPITALITY AND FOOD & DRINK

50% sell on one or several marketplaces.


**PHYSICAL/DIGITAL SYNERGY**

Online stores over the past 12 months

In % of e-shoppers

- Online-only brands: 67%
- Total Brick and Mortar: 71%
- Large specialist retailers’ websites: 38%
- Large food retailers’ websites: 33%
- Brand websites: 23%
- Short channel websites: 14%
- Local store websites: 13%

Source: Fevad/Médiamétrie feedback, January 2022.

**PHYSICAL/DIGITAL SYNERGY FOR FOOD PURCHASES**

In % of online users

- ZERO WASTE WEBSITES/APPS: % who know about them and have used them to buy 17% % who have heard of them 44%
- SHORT CHANNELS/FARM-TO-TABLE WEBSITES/APPS: % who know about them and have used them to buy 7% % who have heard of them 33%
- SMALL LOCAL INDEPENDENT STORES WEBSITES/APPS: % who know about them and have used them to buy 3% % who have heard of them 14%

Source: Fevad/Médiamétrie feedback, May 2022.

**THE ‘SHOP LOCAL’ MOVEMENT**

Among online shoppers who have used a local independent store’s website to place an order in the past year.

- Supporting local businesses: 60%
- Practical reasons: 57%
- Skipping in-store visits: 41%
- Fear of pandemic-related health risks

Source: Fevad/Médiamétrie feedback, January 2022.

**PHYSICAL/DIGITAL SYNERGY FOR RESTAURANTS**

42% of online users have used online meal delivery services in the past 12 months.

Source: Fevad/Médiamétrie feedback, May 2022.

1/5 people who use home delivery services placed an order at least once a week

Source: Fevad/Médiamétrie feedback, May 2022.
## E-commerce

### Business to consumer

![185,000 jobs in 2021 (+14% compared to 2020)]


### E-commerce and employment

In 2020, over half of all companies had increased the number of staff allocated to e-commerce activities to meet the rise in demand for orders triggered by the pandemic. The latter paired with changing consumer habits continued to create new jobs in 2021.

**48%** of sites increased their workforce in 2021

And **54%** plan on recruiting in 2022

Source: Fevad/LSA/Opinionway feedback, March 2022.

![59% of e-shoppers have used several payment methods to shop online over the past 12 months](image)

Source: Fevad/Médiamétrie feedback, September 2021.

### Payment

While payment by bank card is the number-one choice for e-shoppers, alternative methods such as e-wallets, gift cards and transfers continue to gain ground. Alongside this, a growing number of shoppers are opting for ‘buy now, pay later’ options and payment in installments.

#### Payment methods used in % of e-shoppers

<table>
<thead>
<tr>
<th>Method</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single payment by bank card</td>
<td>77%</td>
</tr>
<tr>
<td>E-wallet solution</td>
<td>40%</td>
</tr>
<tr>
<td>Gift card or voucher</td>
<td>33%</td>
</tr>
<tr>
<td>Bank card in three or four installments within three months</td>
<td>19%</td>
</tr>
<tr>
<td>Bank transfer or direct debit</td>
<td>16%</td>
</tr>
<tr>
<td>Cheque</td>
<td>7%</td>
</tr>
<tr>
<td>In-store booking: payment in-store</td>
<td>6%</td>
</tr>
<tr>
<td>Store card or credit card</td>
<td>4%</td>
</tr>
<tr>
<td>Payment to the delivery driver</td>
<td>4%</td>
</tr>
<tr>
<td>Store card or credit card (multiloga payment)</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Fevad/Médiamétrie feedback, September 2021.

### Split payments and “Buy now, pay later” payments in % of e-shoppers

**32%** of e-shoppers have already used split payment to pay for an online purchase (vs. 29% who have used it to pay for a purchase in-store)

**34%** have already used “buy now, pay later” to pay for an online purchase

- Via a deferred debit banking solution: 24%
- Via a solution offered by an online store: 9%
- Via a third-party solution: 4%

Source: Fevad/Médiamétrie feedback, September 2021.

**14%** of e-shoppers have already used these two online payment methods

Source: Fevad/Médiamétrie feedback, September 2021.

### Delivery

In 2021, e-shoppers continued to opt for home delivery, with 80% of them choosing it as their preferred delivery method. Close to seven out of every 10 online users also made use of collection from a specified location (pick-up point, post office, locker/warehouse, or brick-and-mortar store).

#### Delivery methods used

<table>
<thead>
<tr>
<th>Method</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct to their door</td>
<td>79%</td>
</tr>
<tr>
<td>In their workplace</td>
<td>3%</td>
</tr>
<tr>
<td>Had an order delivered to a collection point</td>
<td>67%</td>
</tr>
<tr>
<td>62% travelled to a collection point</td>
<td></td>
</tr>
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<td>In pick-up points</td>
<td>59%</td>
</tr>
<tr>
<td>In post offices</td>
<td>10%</td>
</tr>
<tr>
<td>In warehouses</td>
<td>7%</td>
</tr>
<tr>
<td>25% travelled to a brick-and-mortar store</td>
<td></td>
</tr>
<tr>
<td>In click &amp; collect points</td>
<td>23%</td>
</tr>
<tr>
<td>In-store booking</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: Fevad/Médiamétrie feedback, November 2021.

**33%** of e-shoppers picked up their orders in-store most often (click & collect or drive-through)

**14%** booked products online and paid for them in-store most often (in-store booking)

Source: Fevad/Médiamétrie feedback, January 2022.

Source: Fevad/Médiamétrie feedback, September 2021.

### E-commerce and employment

In 2020, over half of all companies had increased the number of staff allocated to e-commerce activities to meet the rise in demand for orders triggered by the pandemic. The latter paired with changing consumer habits continued to create new jobs in 2021.

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E-COMMERCE IN EUROPE AND AROUND THE WORLD

While 2020 saw the Covid-19 pandemic drive sales of products, sales in 2021 were accelerated by the tourism and services sectors bouncing back. Online sales of products around the world reached close to $5 trillion in 2021, accounting for almost a fifth of all global retail sales.

NUMBER OF E-SHOPPERS IN EUROPE

<table>
<thead>
<tr>
<th>Year</th>
<th>% of Online Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>69%</td>
</tr>
<tr>
<td>2020</td>
<td>74%</td>
</tr>
<tr>
<td>2021</td>
<td>73%</td>
</tr>
</tbody>
</table>

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

NUMBER OF E-SHOPPERS AROUND THE WORLD

<table>
<thead>
<tr>
<th>Year</th>
<th>E-Shoppers in Billions of Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>NC</td>
</tr>
<tr>
<td>2020</td>
<td>2.37</td>
</tr>
<tr>
<td>2021</td>
<td>2.48</td>
</tr>
</tbody>
</table>

E-commerce sales in billions of Euros

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>+13%</td>
</tr>
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E-COMMERCE SALES IN EUROPE

$718 billion

+13% compared to 2020

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

E-COMMERCE SALES AROUND THE WORLD

$4938 trillion

+16.3% compared to 2020

Source: eMarketer, December 2021 and January 2022. Products and services ordered online, excluding trips, tickets for events, food & drink services, and gambling.

INTERNATIONAL SALES

Two out of every three sites did business internationally and maintained this in 2021. As the global sanitary situation has improved and international trade has picked back up, a significant majority of them are forecasting growth in international sales for the next two years.

64% of leading sites sell internationally

61% via local brick-and-mortar presence

60% directly from France

15% via international marketplaces

Source: Fevad/LSA/Opinionway feedback, March 2022.

TOP FIVE EUROPEAN COUNTRIES (IN BILLIONS OF EUROS)

1. United Kingdom
   162.26
2. France
   129.1
3. Germany
   108.4
4. Spain
   55.83
5. Italy
   39.4

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

% OF GDP GENERATED BY E-COMMERCE IN EUROPE

<table>
<thead>
<tr>
<th>Year</th>
<th>% GDP Generated by E-Commerce</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>3.19%</td>
</tr>
<tr>
<td>2020</td>
<td>3.58%</td>
</tr>
<tr>
<td>2021</td>
<td>3.92%</td>
</tr>
</tbody>
</table>

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

CHINA

<table>
<thead>
<tr>
<th>Year</th>
<th>E-commerce Sales in Billions of $</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>13.6% 636 (17.9% vs. previous year)</td>
</tr>
<tr>
<td>2020</td>
<td>18.0% 638 (19.0% vs. previous year)</td>
</tr>
</tbody>
</table>


UNITED STATES

<table>
<thead>
<tr>
<th>Year</th>
<th>E-commerce Sales in Billions of $</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>1801</td>
</tr>
<tr>
<td>2020</td>
<td>2297</td>
</tr>
<tr>
<td>2021</td>
<td>2488</td>
</tr>
</tbody>
</table>

Source: eMarketer, December 2021 and January 2022.

85% of sites are forecasting a rise in the proportion of international sales they expect to see over the next two years

(54%, a significant increase)

Source: Fevad/LSA/Opinionway feedback, March 2022.

85% of leading sites sell internationally

61% via local brick-and-mortar presence

60% directly from France

15% via international marketplaces

TOP FIVE COUNTRIES WHERE FEVAD MEMBER COMPANIES ARE PRESENT

1. Belgium
   81%
2. Spain
   69%
3. Italy
   61%
4. Germany
   55%
5. United Kingdom
   52%

Source: Fevad/LSA/Opinionway feedback, March 2022.

31% of sites that sell internationally have a foothold in over 10 countries

Source: Fevad/LSA/Opinionway feedback, March 2022.
E-commerce

Business to business

Companies going digital set against the backdrop of the pandemic continues to bolster online selling to professionals and businesses. Customer-supplier relations continue to play out online, with physical meetings having picked back up too. The criteria that now go in to choosing a supplier are increasingly linked to digital usages (stock availability, ease of placing orders online, etc.).

SALES OF PRODUCTS

In 2021, growth in sales to professionals (sales of industrial/specialist products, office and IT equipment) returned to its pre-pandemic trajectory (+16% compared to 2020, +29% compared to 2019).

E-COMMERCE SALES GROWTH

+16% compared to 2020 (+29% compared to 2019)

<table>
<thead>
<tr>
<th>Year</th>
<th>+14%</th>
<th>+11%</th>
<th>+16%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Fevad ICE100 (BtoB), sales of industrial/specialist products, office and IT equipment panel.

HOW THE TWO YEARS OF THE COVID-19 PANDEMIC IMPACTED ON COMPANIES’ PURCHASING PATTERN

The pandemic and business digitalisation are impacting customer-supplier relations, from negotiations to choosing who to work with. It has now become customary to use digital channels to communicate and foster customer-supplier relations, and in 2021 these new usages went hand in hand with physical meetings with suppliers clearly resuming. Businesses continued to place more orders online and make use of the Internet at every stage, from business relations and purchase prep to negotiations and beyond. Stock availability has become a key criteria in supplier selection in the context of B2B purchases.

HYBRID MODELS IN WORKFLOWS AND COMMUNICATING WITH SUPPLIERS

In % of clients surveyed

33% allow remote-working, of which 28% operate a hybrid office-based/home-working system

20% believe working out of third-party premises is set to grow (+4 pts vs. 2020)

38% think video meetings are on the rise and set to stay (-6 pts vs. 2020)


GROWTH IN ONLINE ORDERS LINKED TO THE COVID-19 PANDEMIC

In % of clients surveyed

YES, THIS IS SET TO LAST

28% (+7 pts vs. 2020)

45% (+16 pts vs. 2020)

24% (-2 pts vs. 2020)

27% (-7 pts vs. 2020)

YES, BUT ONLY IN EXCEPTIONAL CASES

12% (-1% vs. 2020)

10% (-15 pts vs. 2020)

12% (-6 pts vs. 2020)

12% (+7 pts vs. 2020)

NO, THE OPPOSITE IS TRUE: IT HAS TENDED TO DROP

1% (-2 pts vs. 2020)

0% (+0 pts vs. 2020)

1% (+1 pts vs. 2020)


TOP THREE CRITERIA IN CHOOSING A SUPPLIER FOR ONLINE PURCHASES

1. Stock availability (+7 pts vs. 2020)
   - Microbusinesses
   - SMEs
   - Intermediate/large companies
   - Overall
   - 40% (52%)
   - 50% (53%)
   - 53% (53%)

2. Price (+10 pts and +7 pts vs. 2020 for microbusinesses and SMEs)
   - 61% (-4%)
   - 55% (-4%)

3. Ease of placing orders online (+6 pts vs. 2020)
   - 43% (+4%)
   - 34% (+4%)
   - 37% (+4%)


40% feel the Covid-19 crisis prompted them to develop their online ordering (+8 pts vs. 2020), of which 28% believe this will last

The Covid-19 crisis and e-commerce sales

In 2020, consumers’ habits were turned upside-down by the pandemic. In 2021, many trends gained traction, and purchasing practices that had once been occasional became more habitual for consumers.

HOW THE TWO YEARS OF THE COVID-19 PANDEMIC IMPACTED ON E-SHOPPERS’ HABITS

In 2021, the number of e-shoppers grew by 0.4%: slower growth compared to 2020 (+3.8%). The vast majority of buyers who had discovered online shopping in 2020 returned to the Internet to shop in 2021, both because they had been won over by this way of shopping, and out of a fear of health risks. 2021 was also marked by an acceleration in new online consumer trends: buying local, secondhand, etc.

NEW E-SHOPPERS CAPTURED FOR REPEAT BUSINESS in millions of French people

<table>
<thead>
<tr>
<th>Year</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>40.1</td>
<td>41.6</td>
<td>41.8</td>
</tr>
</tbody>
</table>

+0.4% over 2021/2020 (following on from +3.8% over 2020/2019)

Source: Médiamétrie – Internet usage observatory.

58% of new online food shoppers (FMCG) in 2020 (a total of 3.3 million households) continued shopping online in 2021

Source: NielsenIQ HomeScan/Fevad May 2022.

ACCELERATION IN PURCHASING FREQUENCY in thousands of e-shoppers and % of online users

<table>
<thead>
<tr>
<th>Period</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAST SIX MONTHS</td>
<td>38,232</td>
<td>37,395</td>
</tr>
<tr>
<td>PAST THREE MONTHS</td>
<td>35,723</td>
<td>34,459</td>
</tr>
<tr>
<td>PAST MONTH</td>
<td>27,153</td>
<td>27,241</td>
</tr>
</tbody>
</table>

Source: Médiamétrie – Internet usage observatory – E-commerce 2021 report. Base: online users in the past month who have already made an online purchase.

38% of e-shoppers order more online since the start of the pandemic

Source: Fevad/Médiamétrie feedback, January 2022.

SALES GROWTH BY PRODUCT CATEGORY

INTENSE GROWTH IN FOOD, FURNITURE/DECOR AND BEAUTY PRODUCTS

FAST-MOVING CONSUMER GOODS AND FOOD PRODUCTS

+59% in e-commerce sales compared to 2019 (+10.8% vs. 2020)

Source: NielsenIQ HomeScan (consumer panel).

FURNITURE/DECOR

+46% in e-commerce sales compared to 2019 (+18% vs. 2020)

Source: Fevad iCE.

HYGIENE/BEAUTY

+47% in e-commerce sales compared to 2019 (-3% vs. 2020)

Source: Fevad iCE.

HIGH-TECH AND HOUSEHOLD APPLIANCES

+26% in e-commerce sales compared to 2019 (-6% vs. 2020)

Source: Fevad iCE.

CLOTHING/HOUSEHOLD TEXTILES

+22% in e-commerce sales compared to 2019 (+6% vs. 2020)

Source: Fevad iCE.

TOP THREE REASONS

1 Advantages not available in-store

+48% (+23 pts vs. 2020)

Source: Fevad iCE.

2 In-store sanitary restrictions

+46% (+0 pts vs. 2020)

Source: Fevad iCE.

3 Avoiding in-store trips and sanitary risks as a result

+41% (-12 pts vs. 2020)

Source: Fevad/Médiamétrie feedback, January 2022.

SALES GROWTH BY PRODUCT CATEGORY

Sales growth for iCE100 sites’ product sales excl. FMCG excl. marketplaces

+4% compared to 2020, meaning +60% compared to 2019

Source: Fevad iCE.

INTERNATIONAL TRADE IN FOOD, FURNITURE/DECOR AND BEAUTY PRODUCTS

+59% in e-commerce sales compared to 2019 (+10.8% vs. 2020)

Source: NielsenIQ HomeScan (consumer panel).

Sales for iCE100 sites’ product sales excl. FMCG excl. marketplaces

+4% compared to 2020, meaning +60% compared to 2019

Source: Fevad iCE.
Over the years, CSR has come to play an increasingly important role in the eyes of online consumers. In 2021, 80% of e-shoppers said they had already bought and/or sold a secondhand item online. Ever aware of issues surrounding reducing their environmental footprint and meeting emerging needs, companies have made this a key strategic priority. In this sense, e-commerce helps bring the circular economy to the many.

**E-COMMERCE & ENVIRONMENTAL IMPACT**

Two-thirds of online shoppers say they would have had to use their car if they had made their non-food purchases in-store rather than online. In this sense, home delivery cuts back on a significant proportion of car journeys that would otherwise be made. This proportion is higher among e-shoppers living in small-to medium-sized towns and rural areas.

### Means of Transport Used to Make Non-Food Purchases In-Store Rather Than Online

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>In % of E-Shoppers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>67%</td>
</tr>
<tr>
<td>Foot</td>
<td>12%</td>
</tr>
<tr>
<td>Public transport</td>
<td>12%</td>
</tr>
<tr>
<td>Bike or scooter</td>
<td>2%</td>
</tr>
<tr>
<td>Motorbike/two-wheeler</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: Fevad/Médiamétrie feedback, November 2021.

**A TOP CONSUMER PRIORITY**

Consumers’ expectations in terms of CSR continue to grow. The vast majority of shoppers keep a close eye on brands’ activities in this area and feel companies have improved their approach to packaging (less packaging, reusable packaging, etc.).

**E-Shoppers Have Noted an Improvement in E-commerce Sites’ CSR In % of E-Shoppers**

- Decrease in quantities of packaging used: 81%
- Reusable packaging used: 77%
- Eco-responsible products offered: 68%
- Solutions for decreasing carbon footprint in place: 67%
- Information on production/manufacturing country provided: 65%

Source: Fevad/Médiamétrie feedback, January 2022.

**French-Made Goods: A Key Factor in the Decision to Buy**

In % of e-shoppers the French-made angle plays a bigger part in buying criteria:

- 66%

French-made goods more easily sourced thanks to the Internet:

- 66%

Agree to paying more for a food product bought online if it is French-made:

- 58%

Agree to paying more for a non-food product bought online if it is French-made:

- 56%

Prepared to do without a product found online if it is not from Europe:

- 48%

% who agree

Source: Fevad/Médiamétrie feedback, January 2022.
ONLINE SELLERS’ CSR ACTIVITIES

On 28 July 2021, 14 major online retailers came together with the French government and the Fevad to take action for more sustainable e-commerce by signing the “Charter for Reducing Online Retail’s Environmental Impact”: a framework document that includes pledges and policies surrounding keeping consumers informed, packaging, storing and warehousing, and delivery. On 15 March 2022, 18 new companies joined the movement and signed the charter too.

DELIVERY

In % of online sellers
Use of eco-responsible and/or recyclable packaging

- 56%
- 30%
- 14%

Use of reusable and/or returnable packaging

- 16%
- 37%
- 46%

 already available
Coming soon
Nothing planned

THE PANDEMIC AND LASTING CONSEQUENCES FOR COMPANIES

In % of online sellers
Changes to procurement policies to prioritize French- or European-made goods

- 77%

CSR issues made a priority

- 76%

Remote-working made permanent

- 75%

Growth of secondhand market

- 62%

% who agree
Source: Fevad/LSA/Opinionway feedback, March 2022.

CHANGES IN PURCHASING PATTERNS

In % of online sellers
Supplier compliance with social standards

- 58%
- 21%

Decrease in purchases with high environmental impact

- 52%
- 24%

Consideration given to French-made aspect

- 47%
- 26%

Consideration given to European-made aspect

- 50%
- 23%

Growth in short-channel purchases

- 43%
- 17%

% have already % will do in the near future
Source: Fevad/LSA/Opinionway feedback, March 2022.

E-COMMERCE: DRIVING THE CIRCULAR ECONOMY

Buying secondhand goods is becoming increasingly common online. Two of the five most-visited shopping websites buy and sell secondhand items, a figure that is made all the more impactful at a time when 80% of e-shoppers say they have already bought and/or sold a secondhand item online.

TOP FIVE E-COMMERCE SITES IN AUDIENCE NUMBERS

<table>
<thead>
<tr>
<th>#</th>
<th>Site</th>
<th>Audience (in millions)</th>
<th>% of audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Amazon</td>
<td>36,811</td>
<td>58.3%</td>
</tr>
<tr>
<td>2</td>
<td>Leboncoin</td>
<td>26,895</td>
<td>42.6%</td>
</tr>
<tr>
<td>3</td>
<td>Cdiscount</td>
<td>22,877</td>
<td>36.3%</td>
</tr>
<tr>
<td>4</td>
<td>Fnac</td>
<td>19,121</td>
<td>30.3%</td>
</tr>
<tr>
<td>5</td>
<td>Vinted</td>
<td>17,214</td>
<td>27.3%</td>
</tr>
</tbody>
</table>

Source: Médiamétrie//NetRatings - Global Internet audience – Average Q4 2021.

ONLINE PURCHASES AND SALES OF REFURBISHED OR SECONDHAND ITEMS

50% of online buyers bought refurbished or secondhand items online in 2021
Source: Fevad/Médiamétrie feedback, January 2022.

TOP FIVE REASONS

<table>
<thead>
<tr>
<th>#</th>
<th>Reason</th>
<th>% who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>To save money</td>
<td>80%</td>
</tr>
<tr>
<td>2</td>
<td>To buy branded goods</td>
<td>51%</td>
</tr>
<tr>
<td>3</td>
<td>For the satisfaction of hunting down a bargain</td>
<td>50%</td>
</tr>
<tr>
<td>4</td>
<td>For environmental reasons</td>
<td>48%</td>
</tr>
<tr>
<td>5</td>
<td>For budget reasons</td>
<td>43%</td>
</tr>
</tbody>
</table>

Source: Fevad/Médiamétrie feedback, January 2022.

70% of e-shoppers have already sold products online

<table>
<thead>
<tr>
<th>Type</th>
<th>% of e-shoppers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unused products</td>
<td>79%</td>
</tr>
<tr>
<td>Products to replace</td>
<td>27%</td>
</tr>
<tr>
<td>Gifts received</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Fevad/Médiamétrie feedback, January 2022.