

Strong regional disparities in European B2C e-commerce give mixed picture on sector's growth

Ecommerce Europe and EuroCommerce have once again joined forces for the 2024 European E-commerce Report. In 2023, the European B2C e-commerce sector experienced a modest growth of 3%, up from 2% in 2022, with nominal turnover increasing from €864 billion to €887 billion, and inflation declining from 8.5% to 6.1%. However, despite overall nominal growth, the e-commerce landscape shows significant regional disparities.

The European digital commerce sector is still grappling with challenges slowing its growth since 2022. These include inflation, uneven technological advancement, adopting more sustainable models and adapting to new sustainability regulations. Additionally, EU-based companies are contending with harsh competition from non-EU based players coupled with a lack of fair enforcement of EU regulations on these.

The report's regional breakdown reveals a mixed performance across different macro-areas. Western Europe, traditionally the largest market for European B2C e-commerce, saw a slight decline of 1%, closing 2023 at €596 billion. In contrast, Southern Europe and Eastern Europe showed strong growth rates of 14% and 15%, respectively, with turnovers reaching €166 billion and €17 billion. Central Europe demonstrated resilience with an 8% increase, totalling €79 billion, while Northern Europe faced a 5% decline, ending at €56 billion.

As in the 2023 edition, the 2024 report includes inflation-adjusted numbers for Europe and its regions. Whilst inflation led to a real decline in e-commerce turnover (-3% adjustment), the comparison between last year's overall figures and today's data suggests that inflation is gradually stabilising, with the projected inflation rate for 2024 declining further to a more normal 2.7%. Forecasts also indicate a more robust growth of 8% for 2024, reflecting a rebound in consumer confidence and spending across Europe.

The report highlights the efforts of European e-commerce businesses to comply with new legislation while pursuing growth opportunities. For example, companies are struggling with interpreting and applying the EU Artificial Intelligence (AI) Act principles to proactively design future-proof new shopping experiences, including after-sales and returns. The industry is also exploring or consolidating re-commerce activities, such as refurbishment and second-hand sales, to meet strong consumer demand and comply with new legislation. Despite a potentially more optimistic market outlook, it is crucial for EU and national policymakers to address the issue of unfair competition from non-EU players, particularly those from Asia.

As a reaction to the figures and trends, Luca Casseti, Secretary General of Ecommerce Europe, commented: *"To stabilise after a raft of bumpy years and continue growing, the digital commerce sector needs clear signals from decision-makers, who must acknowledge the role of e-commerce as a driver of a revived European competitiveness. First and foremost, [we must ensure a level playing field](#) and effective enforcement of EU rules towards all e-commerce players active in the EU, no matter where they are based. Secondly, it is paramount that policymakers pursue the objectives of channel-neutrality and easy business compliance when looking at the sector, as laid out in our [Manifesto](#)."*

Christel Delberghe, Director General of EuroCommerce, commented: *"Our report shows that e-commerce remains vibrant and holds significant opportunities for growth through technological advancements and strong consumer demand for sustainability. It also faces many challenges arising from e.g., global competition, different levels of technological adoption or grappling with new EU legislation. The ability of businesses to innovate and adapt to these changing conditions will be key for their success in this competitive landscape, as well as the fair enforcement of EU legislation on all companies selling to EU consumers by European authorities."*

NOTES FOR EDITORS

Ecommerce Europe, EuroCommerce and the Centre for Market Insights will launch the 2024 European E-commerce Report during a **webinar on 10 October at 14:00 CEST**. Please register [here](#).

The Centre for Market Insights of the Amsterdam University of Applied Sciences prepared the report.

A light version of the report is available [here](#).

The European E-commerce Report 2024 provides a thorough analysis of the e-commerce landscape across 38 European countries. This report updates critical metrics on business-to-consumer e-commerce turnover, alongside internet and e-shopper penetration rates, with a special focus on the EU-27. Notably, while Estonia is included in the report, this edition does not feature its turnover data due to the unavailability of figures. Newly included this year, Moldova extends our analysis to provide a more comprehensive view of the evolving European market.

Western Europe is, by far, the largest region, holding 64% of the total B2C turnover in Europe for 2023. Southern Europe follows with a share of 19%. Central Europe (9%), Northern Europe (6%) and Eastern Europe (2%) have a considerably lower share in the total B2C e-commerce turnover. In actual figures for 2023, Western Europe traded €569 billion online, Southern Europe traded €166 billion and Central Europe €79 billion. Northern Europe was just behind Central Europe with €56 billion, followed by Eastern Europe with €17 billion in turnover.

This year, the baseline for e-shopper penetration has been adjusted to reflect the total population aged 16 to 74, resulting in slightly lower figures compared to last year's report, which used internet users as the base. In 2023, 71% of Europe's population aged between 16 and 74 purchased online, suggesting an increase of online shopping in absolute numbers, but concealing upwards or downwards trends specific to the surveyed countries. The concerned national e-commerce associations linked the increase in online purchases with convenience, heightened shopping frequency and wide offer of products, whereas they interpreted decreases in e-shopping as a consequence of inflation and overall uncertainty. Last year, Northern Europe took back its traditional pole position in the share of e-shoppers on the total population aged 16 to 74 (83%). Western Europe, where 82% of the given population segment shopped online in 2022, follows closely, while Central Europe ranks third (70%). Southern Europe saw 59% of its population aged 16 to 74 shopping online, while in Eastern Europe, which includes a significant number of countries outside the European Union, 53% of the thus-aged population shopped online in 2023.

An executive summary of the report is available [here](#).

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