UNDER EMBARGO
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European E-commerce Report 2026

Introduction

The European E-commerce Report 2026 provides an analysis of the e-commerce landscape across 38 European countries. European B2C e-commerce reached €911 billion in 2025, growing by 7%. Growth was strongest in Southern and Eastern Europe, while Western Europe remained the largest market. Across Europe, online shopping and internet use continued to rise, although market maturity led to slower growth in several countries.

New indicators

This edition updates key metrics on business-to-consumer e-commerce turnover, internet and e-shopper penetration, and the contribution of B2C e-commerce to GDP, with a special focus on the EU-27. Several indicators included in previous editions could not be updated this year because recent data are no longer available from Eurostat or the other sources used for this report. This applies to the Infrastructure, Logistics & Sustainability Rankings, national and cross-border online purchasing, and EU-27 purchasing by product category. To provide relevant alternatives, new indicators have been introduced, including B2C e-commerce turnover per capita, the share of enterprises with B2C web sales, and the share of enterprises with web sales via e-commerce marketplaces.

Nominal growth and market dynamics

European B2C e-commerce grew strongly in 2025, but growth remained concentrated in Southern and Eastern Europe as more mature Western European markets expanded at a slower pace.

Total European B2C e-commerce turnover increased by 7%, rising from €842 billion to €911 billion. While all regions recorded growth, the pace varied. Western Europe, the largest e-commerce region, recorded the lowest growth at 5%, reaching €523.1 billion and accounting for 57% of total European turnover. Northern Europe grew by 6% to €69.5 billion, while Central Europe increased by 8% to €92.9 billion. Growth was strongest in Southern and Eastern Europe, growing 11% and 14%, respectively. For 2026, European B2C e-commerce turnover is expected to increase by 5% to €961 billion, with growth forecast to slow in several regions. Western Europe is expected to grow by 4% to €545.7 billion and Northern Europe by 6% to €73.8 billion. Growth in Eastern Europe is forecast to slow from 14% to 5%, bringing turnover to €24.5 billion. Within the EU-27, B2C e-commerce turnover increased by 7% in 2025, from €667.6 billion to €715.8 billion, and is forecast to reach €757.3 billion in 2026, an increase of 6%.

Across Europe, e-GDP increased from 3.65% in 2024 to 3.74% in 2025 and is forecast to reach 3.77% in 2026. Southern Europe had the highest regional e-GDP in 2025 at 4.44%, followed by Western Europe at 3.86%, and Eastern Europe was last with 2.41%. It is important to note that each country applies its own methodology, and the extent to which services are included in B2C e-commerce turnover figures varies widely. As a result, direct comparisons between countries should be approached with caution.

The impact of inflation

Although inflation remained relatively moderate, it reduces the real value of e-commerce growth, highlighting meaningful differences between nominal and inflation-adjusted market performance.

Average inflation in Europe remained at 2.6% in 2025, unchanged from 2024 and well below the high levels of 2022 (8.5%) and 2023 (6.2%). After adjustment for inflation, European B2C e-commerce turnover grew by 4% in 2025, while the EU-27 recorded real growth of 5%. All regions recorded positive real growth, with Southern Europe growing fastest at 8%, followed by Central and Eastern Europe at 5%. The difference between nominal and real growth was largest in Eastern Europe, where inflation reached 8.4%. B2C e-commerce turnover grew by 14% in nominal terms but only 5% after adjustment for inflation.

For 2026, inflation in Europe is forecast at 2.8%, with B2C e-commerce turnover expected to grow by 3% in real terms. Real growth is forecast in all regions except Eastern Europe, where inflation of 5.7% is expected to result in a 1% decline in inflation-adjusted turnover. Within the EU-27, inflation-adjusted growth is also forecast at 3%.

Internet penetration

Internet access is nearing saturation across much of Europe, with future growth increasingly concentrated in countries and regions where connectivity levels remain comparatively lower.

Internet penetration in Europe remained at 93% in 2025, and is forecast to reach 95% in 2026. Northern Europe had the highest internet penetration rate in 2025 at 98%, followed by Western Europe at 96%. Eastern Europe remained the lowest at 88%, but has seen the largest increase since 2021, when internet penetration was 75%.

Within the EU-27, internet penetration increased from 94% in 2024 to 95% in 2025, and is forecast to remain at 95% in 2026. Regional figures are expected to increase further in most parts of Europe in 2026. Western Europe is forecast to reach 97%, Central and Southern Europe 94%, and Eastern Europe 90%, while Northern Europe is expected to remain at 98%.

E-shopper penetration

Online shopping adoption continued to increase across Europe in 2025, although significant differences remain between more mature and less developed digital consumer markets.

The share of Europeans shopping online increased again in 2025. Across Europe, 75% of the population aged 16–74 bought goods or services online, up from 73% in 2024 and 68% in 2021. Northern Europe had the highest e-shopper penetration rate in 2025 at 85%, closely followed by Western Europe at 84% and Central Europe at 74%. Southern Europe and Eastern Europe are further behind with 63% and 60%, respectively.

The European e-shopper penetration rate is forecast to increase to 77% in 2026. Within the EU-27, however, e-shopper penetration remained at 72% in 2025 and is forecast to stay at this level in 2026. The higher e-shopper penetration rate for Europe compared with the EU-27 is due to the inclusion of non-EU countries with high e-shopper penetration, such as Iceland, Norway, Switzerland and the United Kingdom. The United Kingdom has a large impact on the European average because of its population size. Northern Europe is expected to reach 87% and Western Europe 86%, followed by Central Europe at 75%, Southern Europe at 65% and Eastern Europe at 64%.

E-commerce turnover per capita and enterprise web sales

New indicators show interesting differences in the level and uptake of e-commerce across European countries. B2C e-commerce turnover per capita is compared with GDP per capita across all 38 countries, while new EU-27 data show the share of enterprises with 10 or more employees selling to consumers online and using e-commerce marketplaces.

B2C e-commerce turnover per capita is generally higher in countries with higher GDP per capita, although there are clear differences between countries. Denmark, for example, had the highest B2C e-commerce turnover per capita in 2025 at €4,456, followed by Estonia at €4,252 and Ireland at €3,123. Estonia stands out in particular: despite its relatively modest GDP per capita of €30,767, it ranked second in Europe for e-commerce turnover per person. Luxembourg shows the opposite pattern. It had the highest GDP per capita at €132,367, but e-commerce turnover per person was €1,539.

Among EU-27 enterprises with 10 or more employees and web sales, Estonia had the highest share of web sales via their own websites and apps in 2025 at 97%, followed by Denmark (96%) and the Slovak Republic (96%). The lowest reported share was in Lithuania (47%). Web sales via e-commerce marketplaces also differ between countries. Lithuania recorded a share of 87%, well above all other EU-27 countries, followed by Italy (65%), Poland (64%) and Cyprus (61%). At the lower end, Estonia recorded 17%.

Opportunities and challenges

European e-commerce businesses face a complex environment in which innovation opportunities, particularly in AI and digitalisation, are increasingly shaped by regulatory requirements, competitive pressures and economic uncertainty. Technological developments are creating new opportunities to improve efficiency and respond to changing consumer expectations. SMEs often face constraints in responding to these developments.

Regulation remains one of the most widely shared concerns among national e-commerce associations. While the European Commission's simplification agenda is broadly welcomed, businesses in many markets have yet to see a meaningful reduction in administrative burden. Companies continue to deal with overlapping requirements, changing compliance obligations and differences in implementation and enforcement between countries. These challenges can be especially difficult for SMEs, which generally have fewer resources available for compliance. Associations therefore call for greater harmonisation, clearer and more practical rules, and more consistent enforcement across the Single Market.

Fair competition between European businesses and sellers from outside the EU is another major concern. Associations across Europe point to differences in compliance with customs, VAT, product safety, environmental and other regulatory requirements, particularly in relation to low-value imports and large non-EU platforms. The removal of the customs duty exemption for low-value goods purchased online from outside the EU is widely welcomed as a step towards a more level playing field. However, the expected benefits will depend on effective customs controls, better data exchange, digitalised processes and consistent enforcement across Europe.

Artificial intelligence is becoming increasingly important in e-commerce. Businesses are already using AI for customer service, content creation, marketing, product recommendations, personalisation, pricing, analytics and operational processes. Agentic AI could take this further by allowing systems to perform more of the shopping journey on behalf of consumers. While agentic AI is still in its infancy, national e-commerce associations differ in their expectations of how quickly it will develop and how significant its impact will be. Questions around trust, visibility in AI-driven interfaces, control over customer relationships and the future role of webshops are also becoming more important.

Sustainability remains an area of focus in e-commerce, although progress differs between markets and businesses. Companies are investing in packaging optimisation, lower-emission delivery, more efficient logistics, improved product information and circular models such as repair, resale, refurbishment and rental. At the same time, cost pressures, regulatory requirements and limited resources can make sustainability more difficult to implement, especially for SMEs. In several markets, price-sensitive consumers are also less willing or able to prioritise more sustainable alternatives, adding to the challenge of combining environmental improvements with commercial viability.

Consumer behaviour

Consumer expectations around payments and delivery are also evolving. Mobile payments, digital wallets, instant payments and Buy Now, Pay Later (BNPL) are gaining importance in many markets, with convenience, speed and seamless checkout becoming more important. For merchants, expanding payment choice can also mean higher fees, more integrations, increased fraud-prevention requirements and greater operational complexity. Delivery patterns differ considerably between countries, but parcel lockers, pickup points and other out-of-home options are expanding in many markets. Rising expectations around delivery choice, tracking, speed and service continue to put pressure on retailers and logistics providers.

Economic conditions retain an important influence on consumer and business behaviour. In many markets, consumers have become more price-sensitive, compare offers more actively and show stronger demand for promotions and cheaper alternatives. In some countries, this is also supporting growth in second-hand purchasing and cross-border shopping. Businesses are responding with greater attention to efficiency, cost control, automation, conversion and customer retention. At the same time, tariff uncertainty, protectionism and geopolitical tensions are complicating supply chains and international trade, while encouraging some companies to diversify supply chains, regionalise sourcing or explore alternative markets.

Conclusion

Overall, Europe's e-commerce sector continues to grow, innovate and adapt. But it also faces complex challenges linked to compliance, global competition, consumer trust, and sustainability. Continued dialogue between industry, national governments, and EU institutions will be essential to ensure that digital commerce in Europe remains fair, resilient, and competitive.