

THIS IS RETAIL & WHOLESALE IN EUROPE...

5.4 m ENTERPRISES

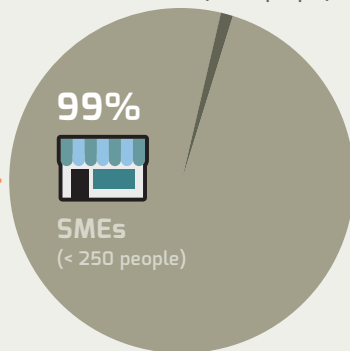
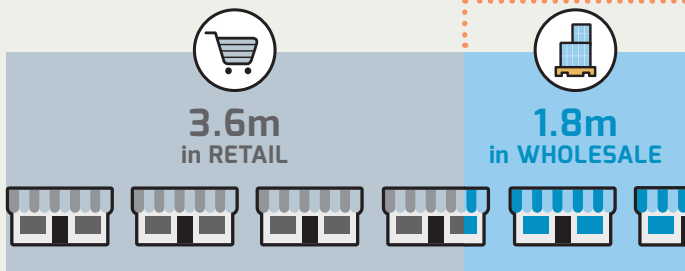
1 in 4 enterprises* is in retail or wholesale



1%



LARGE COMPANIES (> 250 people)



This is...



1.5X more than in construction



2X more than in manufacturing



3X more than in hotels & restaurants

European retailers still among top 10, but losing ground globally (Top 10 retailers worldwide by global turnover)

| 2007 | | 2017 | |
|----------------|---------------------------------------|---------------------------------------|------------------------------|
| 1 > Walmart | 6 > Kroger | 1 > Walmart | 6 > Home Depot |
| 2 > Carrefour | 7 > Schwarz Group (Lidl and Kaufland) | 2 > Costco | 7 > Walgreens Boots Alliance |
| 3 > Tesco | 8 > Target Corporation | 3 > Kroger | 8 > Aldi |
| 4 > Metro | 9 > Costco | 4 > Amazon | 9 > Carrefour |
| 5 > Home Depot | 10 > Aldi | 5 > Schwarz Group (Lidl and Kaufland) | 10 > CVS |

Source: Deloitte, adjusted.

*non-financial business economy.

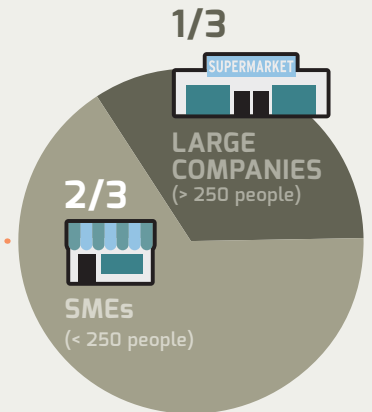
PROVIDING WORK...

29 m JOBS

1 in 7 jobs is in... **... retail or wholesale** ... 1 in 5 'young people' (15-24 years old) works in...



... retail or wholesale



This is...



more than in farming



4X more than in ICT industry



6X more than in food industry



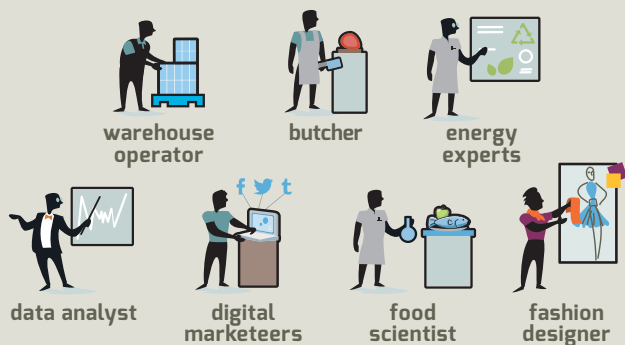
12X more than in automotive industry



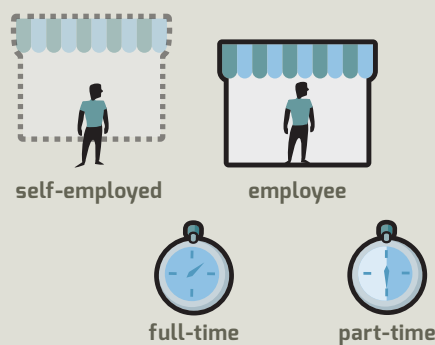
25X more than in chemical industry

JOB DIVERSITY

CAREERS



WORKING HOURS AND RELATIONSHIPS



80% of part-time employees choose to work part-time (FR, UK data).

GOING DIGITAL ...

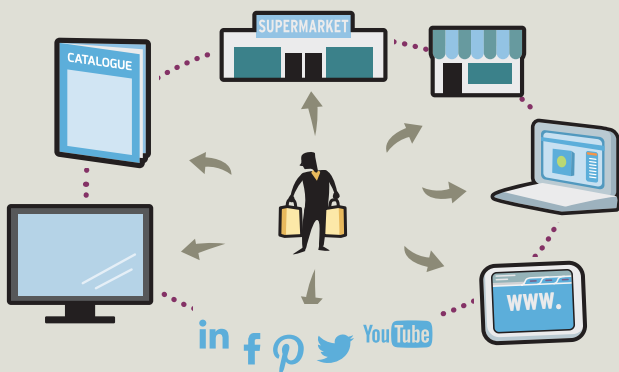
E-COMMERCE
+ 12%
annual growth
(sales)

€ 486 bn ONLINE RETAIL SALES [☆]

1 in 2 consumers shops online...



ENJOYS OMNI-CHANNEL RETAIL



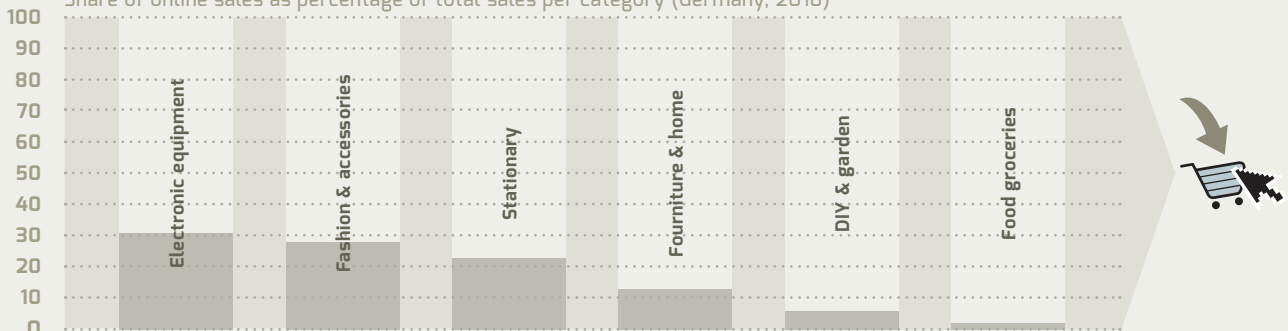
USES MOBILE DEVICES & SOCIAL MEDIA



M-COMMERCE
+ 100%
annual growth
(sales)

ONLINE PURCHASES: MANY ELECTRONICS & FASHION, BUT STILL LITTLE FOOD

Share of online sales as percentage of total sales per category (Germany, 2018)

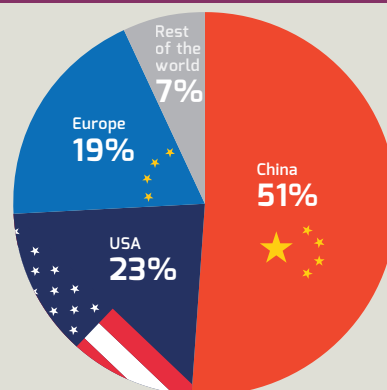


STILL BARRIERS TO E-COMMERCE IN EU



only 19%
of consumers buy
online across borders

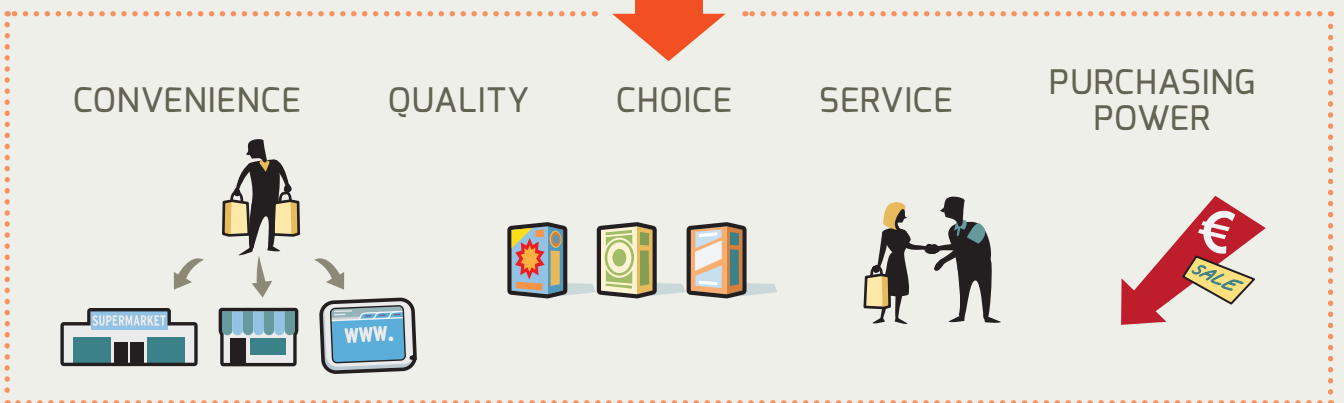
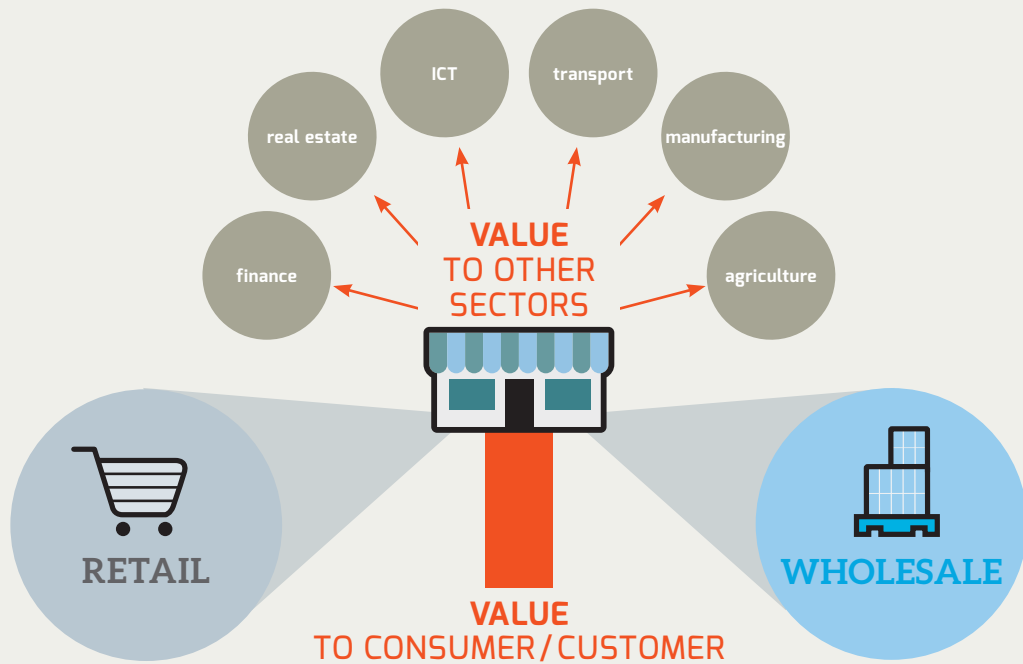
EUROPE'S MARKET IS DWARFED BY CHINA & US (E-commerce sales, % of world total, 2018)



ADDING VALUE...

9%
of EU total

€1 tn VALUE ADDED



Source: Eurostat, Oxford Said Business School.



www.eurocommerce.eu