



ChannelX

# European Marketplaces 2023

In partnership with:

**MARKETPLACER**<sup>™</sup>

# Introduction

**Marketplaces have become a key ecommerce platform worldwide, driven by changing consumer habits. What does that mean for Europe's retailers?**

## WHY THIS MATTERS

For retailers and brands, the rise of marketplaces presents both a threat and an opportunity. The threat lies in marketplaces potentially taking away their customers, undercutting their prices and trashing their business models. The opportunity is that since more customers shop on marketplaces than anywhere else online, being part of a marketplace opens up retailers and brands to a new tranche of customers.

The use of marketplaces can also extend reach into new markets and territories with much lower capital expenditure and risk, while the logistical support these platforms offer can substantially benefit expanding retailers.

## TL;DR

Globally, **35% of all online purchases are made on a marketplace**. In Europe, **85% of web traffic goes to marketplaces**, which themselves make up 62% of Europe's Top100 retailers by category.

**Western and Eastern Europe** have the highest uptake of marketplace shopping, attracting **83%** and **85%** of Top100 traffic respectively. These regions are characterised by, conversely, the West being a highly evolved ecommerce market and the East being

relatively new to the game. Consumers in both have independently alighted upon marketplaces as the most convenient way to shop.

**Central and Southern Europe** lag slightly behind, with just **57%** and **58%** respectively of Top100 retailers being marketplaces. However, here more than **80%** of traffic flows to these fewer marketplaces, comparable to the markets of Western and Eastern Europe.

Only the **Nordics** see low marketplace uptake, with just **45%** of Top100 retailers being marketplaces, attracting **68%** of traffic.

Of Europe's 24 leading marketplaces assessed in the report, **11 are pure marketplaces** – platforms that only connect buyers and sellers and that offer none of their own products. Of these, **seven are generalist** marketplaces, selling products across a wide range of categories. The remaining four are more specialised, offering a wide range of products around specific verticals. The most common are **fashion** and **consumer electronics**, although those focused on recycled products also feature.

The remaining **13** of the 24 marketplaces assessed are either **mixed marketplaces** – which sell their own products along with those of third-parties and brands – **or retailer-run marketplaces**, which typically sell products allied to those retailer core products either within the retailer site or on a separated marketplace site. Here, just **five are generalist**, the rest are all more specialist – unsurprising given that they are selling alongside retailer sites that are typically more specialist.

## Contents

Market overview	03
Marketplace types	08
<b>Pure marketplace profiles</b>	
Aliexpress	11
Allegro	13
eBay	15
eMag	17
Etsy	19
ManoMano	21
OnBuy	23
OTTO	25
Refurbed	27
Temu	28
Wish	29
<b>Mixed &amp; retailer marketplace profiles</b>	
Amazon	30
Bol.com	32
Boots	34
B&Q	36
Carrefour	37
Cdiscount	38
Decathlon	40
Fnac	42
Leroy Merlin	44
Lidl	46
MediaMarkt	48
Superdrug	50
Zalando	52
Partner Perspective: Marketplacer	54
The road ahead	56
Figures	59
End Matter	61

# Market overview

Marketplaces have come to define modern ecommerce, with European shoppers using them as a first port of call

## CONSUMER INTEREST IN MARKETPLACES

According to data, 35% of online purchases made globally now take place on a marketplace. If there were any doubts as to how dominant these platforms have become over the past five years, this is the statistic to dispel them and to put that in context, only 17% of online purchases take place in a supermarket and just 12% in a retailer-branded site.

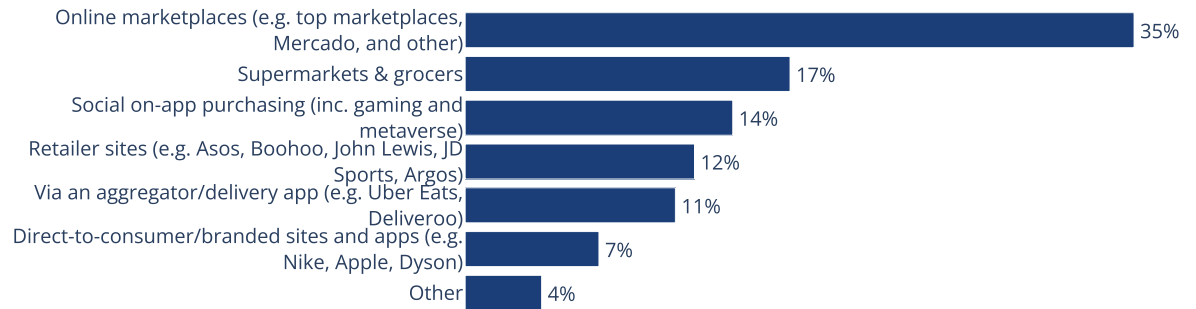
This shift in use of marketplaces as a first port of call for online shopping has been a slow burn. The proliferation of third-party marketplaces globally has grown a staggering 500% since 2007 and is reported to be heading towards accounting for almost 60% of online sales by 2027. In China, marketplace sales account for 80% of total ecommerce sales in 2023<sup>[1]</sup>.

This interest in marketplace buying has been driven by a range of factors: convenience, competitive pricing, wide variety of choice and even easy-to-manage delivery options. Factor in the ability for marketplaces to also act as ‘search engines for shopping’ – unifying both choice and convenience – and it’s easy to see why they are in the ascendency.

This can also be seen in the wide appeal that marketplaces have across the generations. While Millennials tend to be slightly more drawn to

## Distribution of online purchases, by channel

Worldwide, 2022



Based on 3,040 online interviews to consumer who shop online at least once a month worldwide, aged 16+, Mar-Apr 2022

Source: Wunderman Thompson Commerce

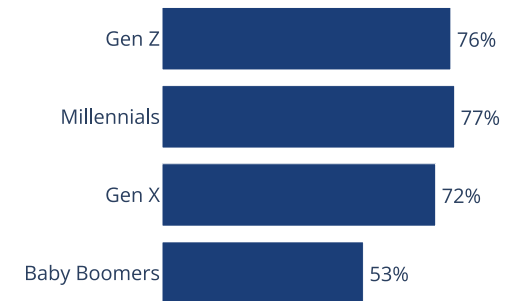
© RetailX 2023  
RXMMPEU23RP-4-v2

marketplace shopping than other cohorts of shoppers, they along with Gens X and Z are most keen on marketplace shopping, with between 72% and 77% of each demographic group doing so in 2022. Only Baby Boomers fall below the 70% mark, with just 53% of those aged over 57 years using marketplaces as their main online shopping location.

Part of this skew in the older region is down to data being from a global sample, which includes older shoppers in less tech-savvy and advanced markets, where older consumers are less likely to use the web for anything. When looking at the developed markets of Europe, a clearer picture emerges of marketplaces being incredibly popular across all age groups.

## Global online marketplaces direct buyers, by generation

Worldwide, 2022



Based on 516 online consumers worldwide, aged 18+, Oct-Nov 2022

Source: Capgemini

© RetailX 2023  
RXMMPEU23RP-3-v3

### MARKETPLACE DISTRIBUTION ACROSS EUROPE'S LARGEST 100 RETAILERS

The deep entrenchment of marketplaces among European consumers can be seen by how many of Europe's Largest 100 retailers are marketplaces.

Of the Largest 100 online retailers across the continent, 62% are marketplaces of one form or another. This dwarfs both brands and retailer sites.

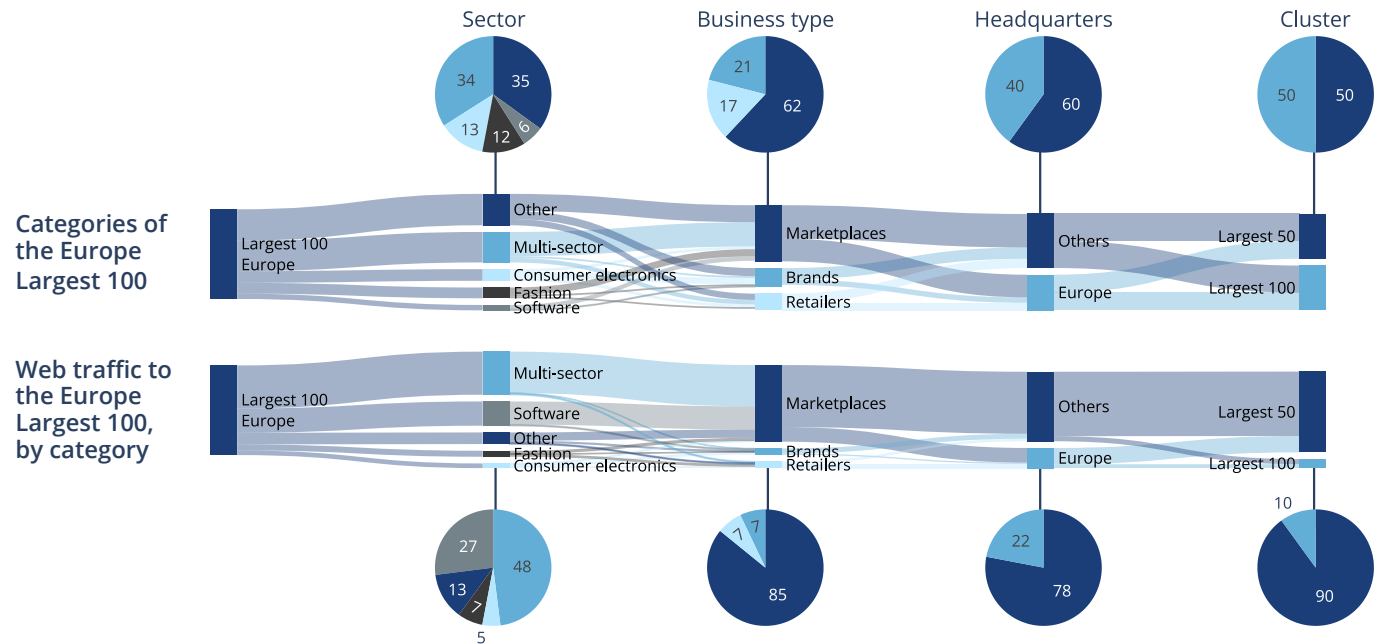
A similar picture emerges when looking at Europe's largest online retailers by traffic. Here, a staggering 85% of visits are to marketplaces, again dwarfing the 7% each to brand and retailer sites.

It is clear that, from a consumer's point of view, marketplaces are the preferred way to shop online, since they attract the lion's share of ecommerce traffic and they have grown to become the largest retailers within the region.

But more alarming for Europe's retailers and brands is the fact that the majority of these marketplaces are based outside Europe. As the chart shows, 60% of the Largest 100 retailers in Europe by category and 78% by traffic are not based within Europe at all. Of the marketplaces, the split is close to two-thirds by category not being European-based and around four-fifths by traffic.

This has a number of causes and implications. One cause is that there are a few very large marketplaces that dominate the ecommerce market – notably Amazon, eBay and AliExpress. All are based outside of Europe, the first two in the US and the latter in China. While many more marketplaces do have

### Category analysis of the Europe Largest 100



Top Sankey chart: the percentage of Europe Largest 100 retailers in a category. Bottom sankey chart: the percentage of European consumer web traffic directed at Europe Largest 100 retailers' websites by category. All figures are expressed as percentages

Source: RetailX, SimilarWeb (web traffic)

© RetailX 2023  
RXMMPEU23RP-EUR

HQs in Europe, most are relatively small compared with these three foreign giants.

The implications are less straightforward. The dominance of marketplaces is troublesome for retailers and brands, who are increasingly forced to use them to reach customers. The fact that the big three have something of a hegemony is even more problematic because it takes trade outside

the region. The upside is that across Europe, marketplaces are now springing up to take on these dominant players. While this increases the competitive pressure to use marketplaces, it at least keeps business relatively local. It has also inspired many retailers to set up their own marketplaces to tap into this market.

### MARKETPLACE DISTRIBUTION WITHIN EUROPE

In all but Northern Europe, marketplaces account for more than half of the Largest 100 retail sites. Across Western and Eastern Europe, 64% and 62% are marketplaces, respectively. This is reflected in traffic levels to marketplaces in these regions, which see 83% and 85% respectively of traffic to the Largest 100 sites in these regions going to marketplaces.

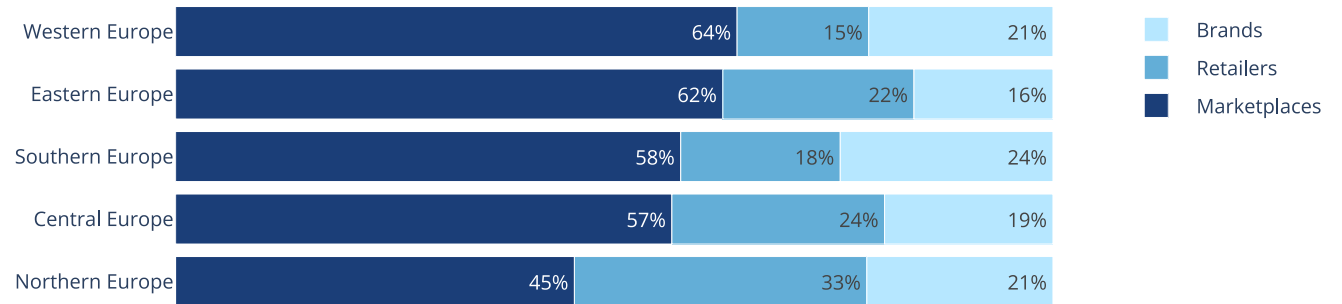
These regions, while showing similar levels of marketplace uptake and traffic, have reached 'peak marketplace' for different reasons. In Western Europe, a mature ecommerce market has evolved to encompass marketplace selling, with marketplaces slowly growing in popularity as more consumers embraced ecommerce. These markets have also seen a greater and earlier push by North American marketplaces Amazon and eBay as the markets here have grown.

Eastern Europe, by contrast, has come later to the ecommerce party after seeing the power of the model in Western Europe and seeking to copy it locally. Here, sites such as Poland's mighty Allegro have seized on the nascent ecommerce market in the region and sought to exploit it through a marketplace model. This has seen Eastern European shoppers new to ecommerce view marketplaces as the natural way to shop online.

Across Southern and Central Europe, marketplace uptake, while still very healthy at 58% and 57% respectively, has been slower to grow for two main reasons. Firstly, ecommerce lags behind other regions for cultural reasons, with many shoppers still preferring real world retail for many items. Secondly,

### Number of Largest 100 list members categorised by business type

Europe, 2023



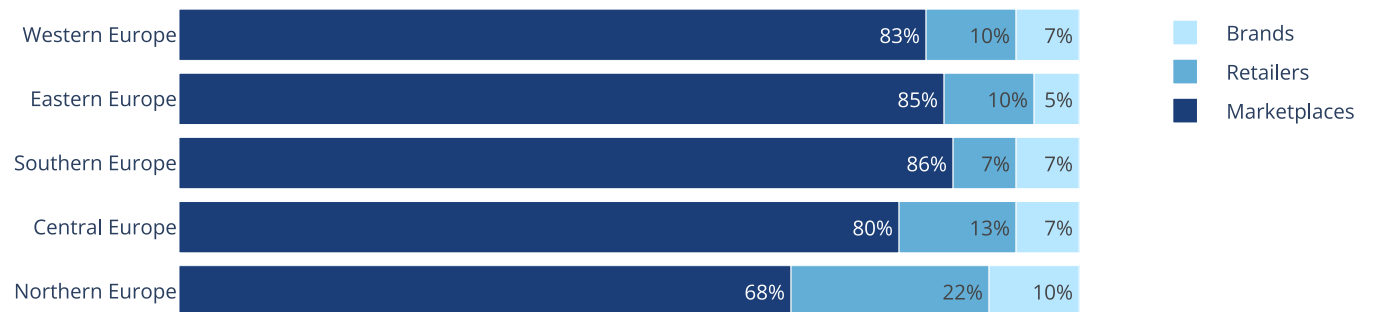
The list of Largest 100 in each region was determined by European web traffic to the retailer's websites

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-1-v2

### Share of European web traffic to the Largest 100 list categorised by business type

Europe, 2023



The list of Largest 100 in each region was determined by European web traffic to the retailer's websites

Source: RetailX

© RetailX 2023

ecommerce in these markets is still dominated by these physical retail brands selling online.

The same can be said about Northern Europe. Here, technology is, if anything, even more prevalent in society than everywhere else in Europe. However, in many Scandinavian countries, shopping is still culturally a brand-led and often physical phenomenon, with ecommerce slow to take off due to many countries in this region having scant populations spread over a large geographic area, making delivery expensive.

**MARKETPLACES BY COUNTRY**

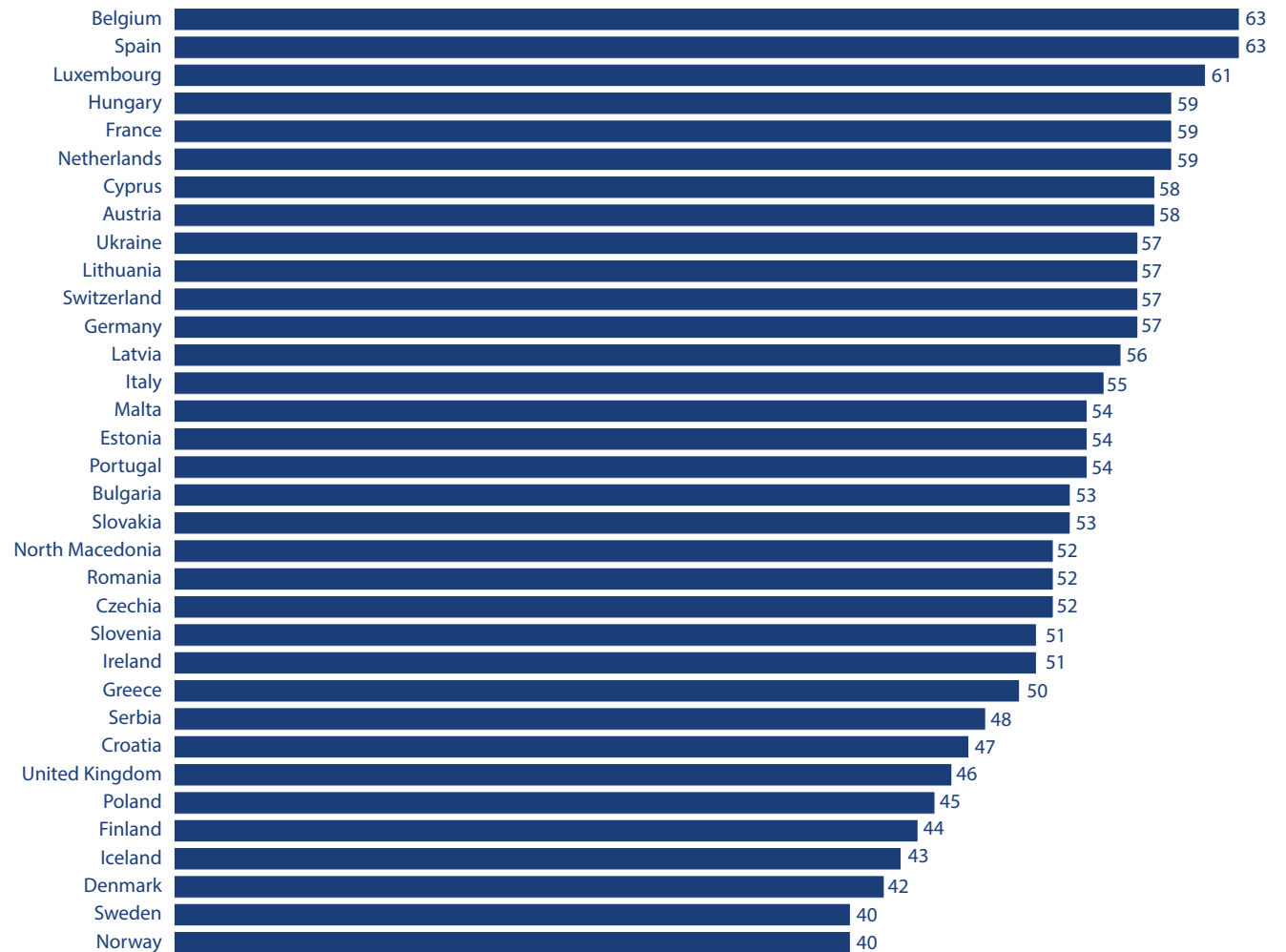
This cultural-regional duopoly can be seen clearly in how total web traffic is shared between marketplaces in the Largest 100 in each country. The list is dominated by Western and Eastern countries, with Germany, Ukraine, Austria, Hungary, France, Bulgaria and Romania all in the top 10 and all seeing more than 80% of total web traffic going to marketplaces.

At the other end of the table, Denmark, Sweden, Finland, Norway and Iceland make up the bottom six, along with Slovenia.

Similarly, the countries that feature the highest proportion of marketplaces among their Largest 100 also lie broadly in these regions. Belgium and Luxembourg seem 63% of Largest 100 retailers being marketplaces, with similar levels seen in France (59%), Hungary (59%), the Netherlands (59%), Austria (58%) and Ukraine (57%) all in the top 10.

**Number of marketplaces within the Largest 100 list, by country**

Europe, 2023



The list of Largest 100 in each region was determined by the country's web traffic to the retailer's websites  
Source: RetailX

The bottom five are made up entirely of Scandinavian countries, with Finland seeing 44% of its Largest 100 retailers being marketplaces, Iceland 43%, Denmark 42% and both Norway and Sweden just 40%.

There are, of course, anomalies with this cultural-geographical split. Spain is in Southern Europe, yet has a very active and advanced ecommerce market driven by a highly tech-savvy population. Here, 63% of Largest 100 retailers are marketplaces, taking around 87% share of web-traffic. The picture is similar in Italy, where a more typical 55% of Largest 100 sites are marketplaces, although these attract 85% of traffic.

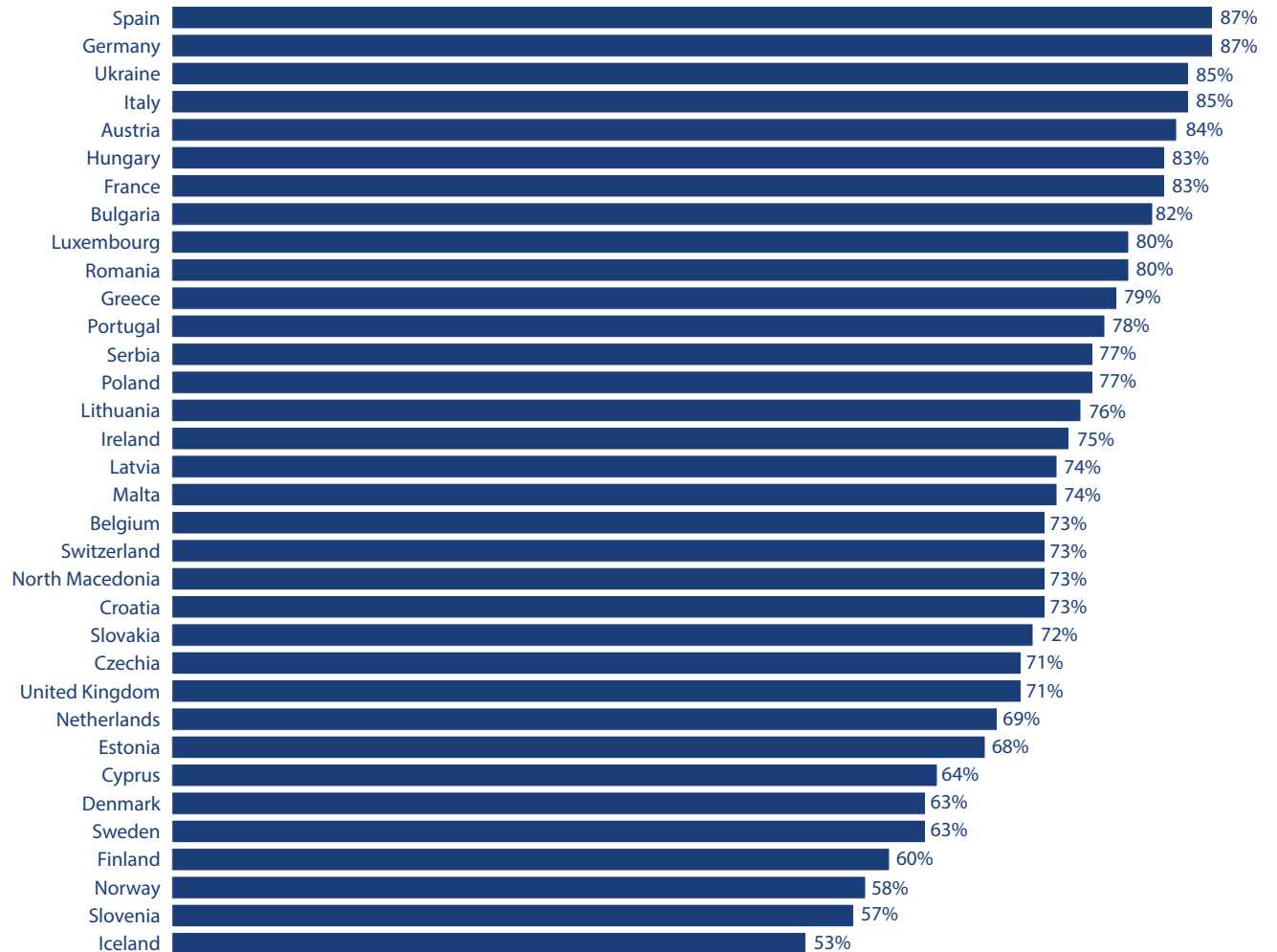
These markets, while geographically in Southern Europe, are much more akin to highly advanced Western European markets and this is reflected in the maturity and usage of marketplaces. The averages for Southern Europe are pulled down by a lack of marketplace growth in countries such as Portugal, where just 54% of Largest 100 retailers are marketplaces, and Greece (50%), skewing the results.

Yet the UK, which has one of the most advanced ecommerce markets in Europe, sees only 46% of Largest 100 retailers as marketplaces. This is because the UK market has many highly advanced online retailers and just a few highly trafficked marketplaces, dominated by Amazon, eBay, Alibaba and Asos. This belies just how central to UK ecommerce marketplaces have become, with traffic to these marketplaces topping 71% in 2023.

Consequently, many of these big-name online retailers are opening their own marketplaces – and acting as an outlier for the rest of Europe.

## Share of total web traffic directed to marketplaces within the Largest 100 list, by country

Europe, 2023



The list of Largest 100 in each region was determined by the country's web traffic to the retailer's websites

Source: RetailX

# Marketplace types

## As the marketplace market has evolved globally, Europe's marketplaces now take a variety of forms

Marketplaces have morphed from being simply platforms that connect buyers with sellers to a range of different things, depending on the markets that they serve.

There are essentially two kinds of marketplaces globally, which can be further sub-divided into another two categories. Firstly, there is the split by what they sell. On the one side, there's a range of general marketplaces that are platforms for selling a broad range of goods from a variety of sources. Then there are those that are specialist, often targeting a particular set of related verticals, although sometimes being very focused on a highly specialist niche.

Then there are the two, distinct ways these marketplaces operate. Here we have the pure marketplaces that act simply as the platform for other parties to sell on. Secondly, there are those that are mixed marketplaces, which sell not only items from third-party sellers but also from their own ranges.

To muddy the waters still further, this latter grouping has come to embrace a growing crop of retailer-run marketplaces, where existing, established retailers have created their own platforms to sell third-party goods alongside their core offerings.

In previous iterations of this RetailX European Marketplaces report, this latter group of retailer owned and operated marketplaces has largely been discussed as a third, separate group. However, from 2023 and going forward, these have been amalgamated with the mixed marketplaces better to reflect just how the lines between mixed and retailer marketplaces have blurred and dissolved.

### GENERALISTS VERSUS SPECIALISTS

It could be argued that Amazon, which started the marketplace market back in 1994, created the first specialist marketplace by selling books. However, it quickly started to add related goods and soon became the epitome of a general marketplace, selling a wide range of goods from across a wide range of verticals.

Likewise, marketplace pioneer eBay has always been a general marketplace, selling perhaps the broadest range of categorised items of any marketplace.

But generalised marketplaces aren't the only game in town. Increasingly, marketplaces that specialise in one vertical or a group of related verticals have sprung up, each taking the successful and easy-to-use model of the marketplace and applying it to a specific audience.

This is notable in the most popular categories of fashion apparel and consumer electronics. Admittedly, these 'niches' are huge. Each has a growing customer base and lend themselves to the marketplace model of broad range and a dedicated customer base looking for variety. For example, Zalando and Asos have both adopted this model with great success.



© Shutterstock

There are other specialist marketplaces that have looked to other sectors to replicate this success, with Etsy being perhaps one of the best known, focusing on craft-related and self-made items.

More recently, specialism in marketplaces has gone beyond just looking at a vertical or sector and has honed-in on even more specific traits of that sector. Take, for example, the rise of pre-loved and recycled fashion, which sites such as Vinted and Depop have exploited in spades. Refurbed has done the same in the consumer electronics sector.

This new crop of specialist specialists driven by re-use and environmental targets has, in turn, pushed more



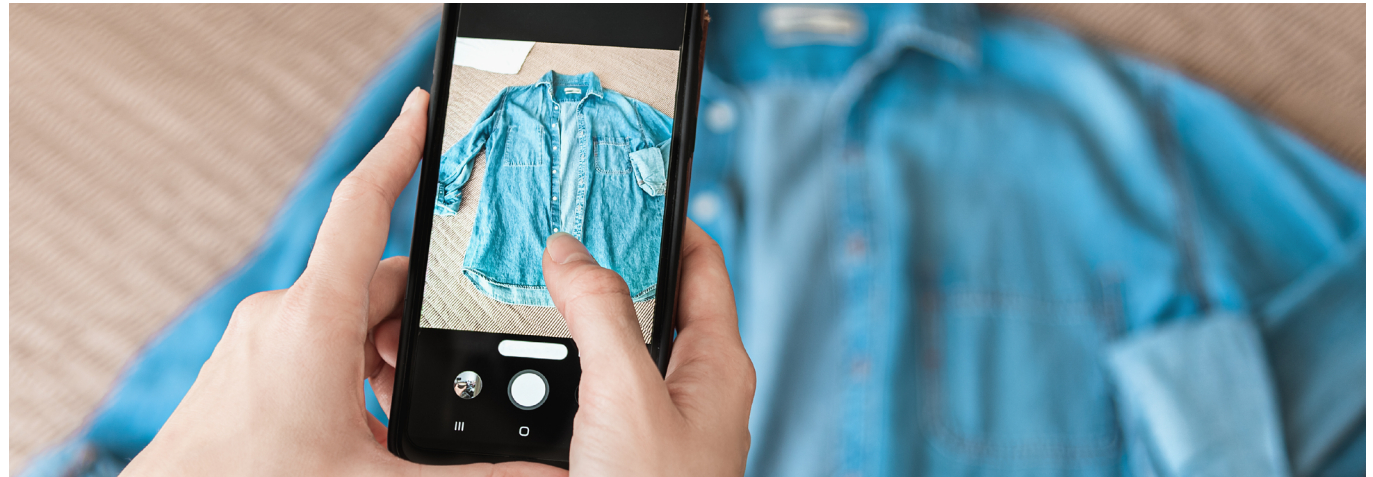
established players to look to do the same. In many ways, the marketplace market has come full circle with pioneering, generalist site eBay now dedicating a focused part of its site to pre-loved fashion and refurbished consumer electronics. One thing is for sure – marketplaces just keeps on evolving.

### PURE MARKETPLACES

Pure marketplaces are the essence of marketplace selling, acting only as an intermediary between buyers and sellers. On the face of it, pure marketplaces look simple: sellers list their products and buyers come find them. However, what makes many of them stand out is that they offer a range of ecommerce services around that – typically marketing, payments and, in some cases logistics and shipping. Such services allow sellers to tap into ecommerce without having to invest heavily in their own platform, marketing and logistics.

This has proved to be a boon to many sellers and continues to underpin some of the largest and most successful marketplaces globally, including eBay, Allegro. Bol.com and relatively new entrant Temu.

These platforms have grown in popularity among sellers because they not only take the tactical work of online selling and deliver it to the merchant as a service, they also place the merchants where the consumers are looking for them. With shoppers increasingly drawn to the convenience, choice and price competitiveness of marketplaces, pure marketplaces offer merchants and brands a relatively easy – and cost effective – way to meet these consumers.



While many pure sites sprung up to cater to small and individual sellers – witness eBay's rise – these platforms are now so successful that many large brands and retailers also use them as part of their online selling strategy. This is indicative of just how entrenched within the ecommerce model marketplaces are, with even large companies such as Adidas, Microsoft and Nintendo all selling on eBay.

### MIXED AND RETAILER MARKETPLACES

The flipside to pure marketplaces are those that offer both own-brand goods and those of third-party sellers. These mixed marketplaces – Amazon included – have grown up tapping into the consumer need for convenience and price competitiveness and offered sellers logistical and delivery support much like their pure counterparts. However, the operators have also seen the value of offering their own branded items in the most popular categories and have, as a result, become online retailers.

Many well-known and established retailers have seen the advantages of this approach and have come at it from the other side, adding their own marketplaces to their core sites.

Many of these retailer-owned marketplaces were established to allow retailers to sell products related to their core offering without having to invest time and money into making them part of their existing supply chain. This has allowed for rapid expansion of inventory and reach, often attracting new customers.

Decathlon, for example, used the marketplace idea to offer peripheral items around its core market of sports, outdoor and leisure items, adding things such as specialist cycling components to its roster.

Hypermarket Carrefour, meanwhile, created a marketplace to offer locally sourced artisan and specialist foods alongside its everyday staples. These

moves allowed each to create a new customer base likely to also buy their key offerings from the site.

The mixed and retailer marketplace models also lend themselves to the creation of sector-specific sales. Zalando, for example, has cornered the market in cheap, online fashion by selling a range of brands alongside its own brand goods. Decathlon has widened its reach within outdoor pursuits by adding a marketplace.

This, however, showcases just how blurred the lines between what is a marketplace and what isn't has become. Is Zalando a marketplace or a fashion retailer like any other? How, for example, does it differ from Zara?

The line is fine, but right now Zara is a retailer selling its own label products direct to consumers with its own bespoke platform that is enclosed in its own 'Zara' ecosystem. Yet Zalando predominantly sells third-party brands, which it also fulfils and services, alongside its own wares. While this is increasingly a vague distinction, it's one that needs to be made.

As retailers adopt more marketplace selling and create their own marketplaces, it is likely that what is a marketplace and what isn't will become even less clear. This is something made all the more confusing by other platforms, such as social media sites, also now selling goods (see panel).

## Social commerce: the new face of marketplaces?

RetailX data shows that already some 17% of online purchases made globally are done so through social media apps. As the likes of TikTok join old-timers Facebook and Instagram in offering shops on their sites, this growth of social commerce is set to continue.

But are these sites marketplaces? The world's 4.9bn social media users have long used these sites to find out about goods, services, merchants and products, then share their own experiences of them. Increasingly, these social sites have adapted their ability to act as marketing channels for brands and retailers, allowing these companies to sell their wares through their posts on these platforms.

That doesn't necessarily make them marketplaces in the conventional sense. In most cases, social media platforms that offer goods for sale through merchant, brand or retailer posts redirect the user to a retailer or brand's ecommerce website. They may even redirect to their presence on a marketplace such as Amazon or Alibaba.

However, even this process is starting to become a key way to sell, with social sites



©Shutterstock

offering discovery, conversion, review and amplification for brands that choose to advertise on them. The fact that fulfilment then takes place either on the brand's site or another 'actual' marketplace is not really the point. It's that social media sites offer much of the process of bringing the buyer and seller together in one place and facilitating the purchase.

Social sites are therefore probably going to be considered some form of marketplace. This is certainly the view of Elon Musk, who wants to turn X, the newly rebranded Twitter, into a 'super app' that will bring together all these functions, much as China's hugely successful WeChat has done already.

# AliExpress

## A growing number of European Top1000 retailers are having their interest piqued by this Chinese entrant

With a turnover in 2022 of €119.4bn, AliExpress has grown from being a powerhouse in the Chinese market to one that is increasingly becoming a marketplace where European shoppers are also buying goods.

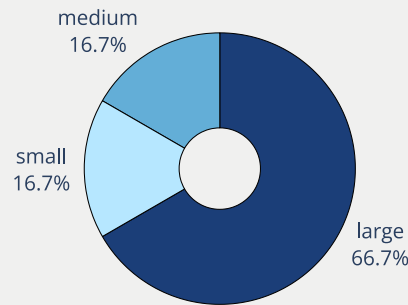
This is starting to pique the interest of European retailers and brands, with around 20% of Europe's Top1000 retailers selling products on the site. The majority of these (42%) are multi-sector stores, while the most dominant single sector is consumer electronics (17%).

The bulk of these companies are from the UK (25%), with retailers and brands in Poland (17%) and France (8%) also increasingly being attracted to AliExpress.

Interestingly an additional quarter of retailers on the site are from the US. This outweighs even those from China itself, which make up just 17% of retailers based on HQ location.

67% of the European retailers selling on the site have turnovers of more than €100mn a year, yet just 25% of these are brands, many of which are sold on the site by third parties.

Relative size of Europe Top1000 retailers selling on AliExpress

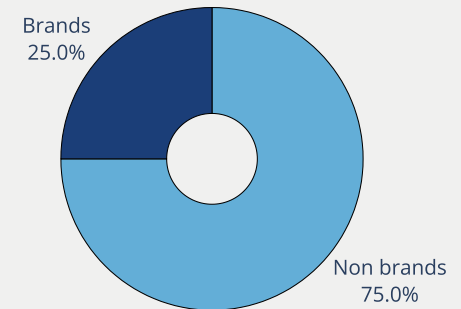


Based on the 12 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

RetailX 2023

Share of Europe Top1000 retailers with their own brand selling on AliExpress



Based on the 12 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

RetailX 2023

The marketplace is also home to a long tail of SME sellers from within Europe, as well as many more selling from China. This reliance on so many smaller brands has seen AliExpress experience some issues of fake goods being sold to disgruntled customers, with 127,000 reviewers on TrustPilot rating the platform a mere 2.7 out of 5.

As part of its global expansion plans, the company has invested heavily in warehousing, not only across China but also in the US and EU. This enables rapid delivery to anywhere in the world in under 40 days.

However, despite its focus on the EU, AliExpress accounted for just 4% of the Western European retail market in 2022 – way behind Amazon's 20%. In Eastern Europe, it takes a slightly higher 5% share, which still trails far behind Poland's Allegro and Russia's Wildberries by a similarly wide margin.

There has also been a slowing in sales during 2022 and 2023, with logistics impacted by Russia's war against Ukraine. The impact of the EU's annualisation of VAT rules and the depreciating value of the euro are also set to hamper growth.



## AliExpress

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100, UK Top500

**Retail websites:** aliexpress.com

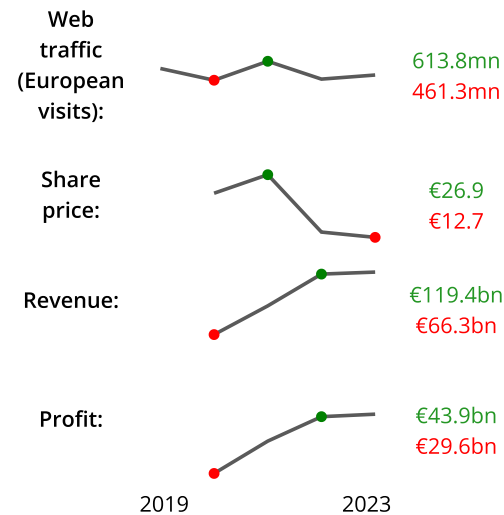
**Most significant retail markets:** Spain, France, Poland, Italy, Germany

**Retail HQ:** China

**Corporation:** Alibaba Group Holding Ltd, HKG: 9988

**Other brands in the group:** 1688, Alibaba.com, Redmart, Tmall, Taobao, Lazada, Alibaba Cloud, Damai Culture Media Development Co., Alimail, Kaola

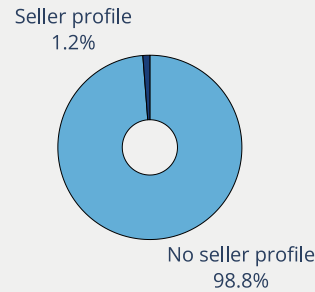
**Twitter:** @AliExpress\_EN



Researched 07-12-2017 to 04-09-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

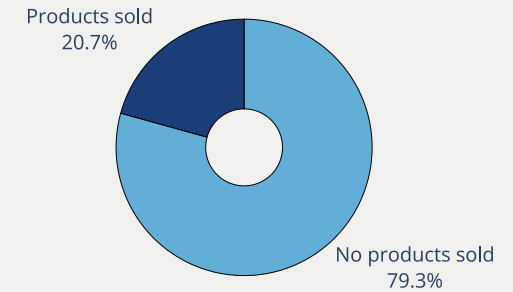
Share of Europe Top1000 retailers with a seller profile on AliExpress



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Aliexpress-AC-1-v1

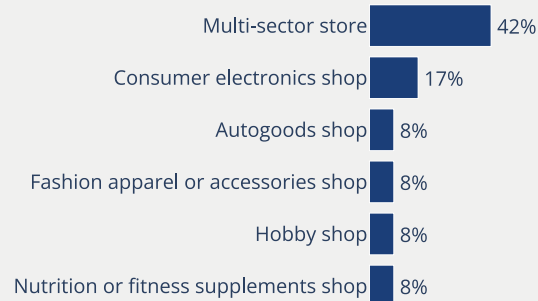
Share of Europe Top1000 retailers with their products sold on AliExpress



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Aliexpress-AC-2-v1

Europe Top1000 retailers selling on AliExpress by sector, 2023

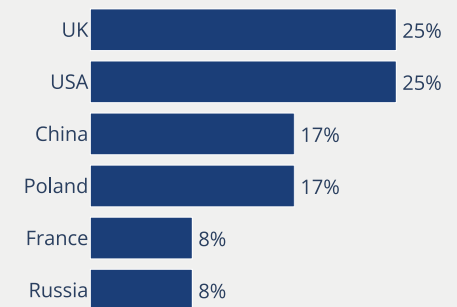


Based on the 12 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Aliexpress-AC-3-v2

Europe Top1000 retailers selling on AliExpress by headquarters location, 2023



Based on the 12 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Aliexpress-AC-4-v2

# Allegro

## Dominating the Polish market, Allegro now has its eyes on spreading tech-driven growth across the wider region

Allegro has been a runaway success in its native Poland. In the 23 years since it was set up, it's become not only one of Eastern Europe's biggest marketplaces, but also one of the region's leading technology companies.

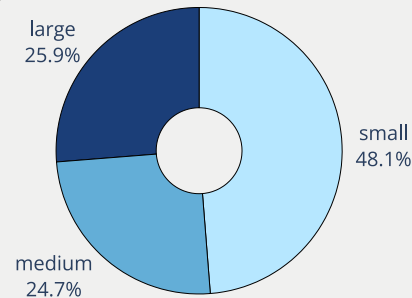
With more than 135,000 merchants and some 22mn monthly visits, Allegro not only dominates the Polish ecommerce market but also now has a significant presence in Czechia, Slovakia, Hungary, Slovenia and Croatia.

As a result of its growing significance in the region, Allegro now has 30% of Europe's Top1000 retailers selling products on its site, the majority (45%) fashion apparel and accessories. Consumer electronics (18%) and cosmetics (18%) are also popular.

Interestingly, just 10% of retailers selling on the site are Polish, Allegro instead being dominated by brands and retailers from the UK and US (23% each) and neighbouring Germany (16%).

This reflects the importance Allegro has as the dominant marketplace in Poland and Eastern Europe, with sellers from these large out-of-country markets relying on it to gain access to the market in the absence of any competition.

Relative size of Europe Top1000 retailers selling on Allegro

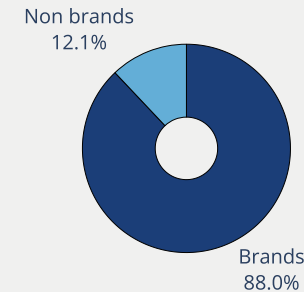


Based on the 83 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Allegro-AC-5-v3

Share of Europe Top1000 retailers with their own brand selling on Allegro



Based on the 83 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Allegro-AC-6-v1

So far, not even Amazon has attempted to target Poland with any real gusto.

While brands make up the vast majority of sellers (88%), the marketplace does attract a large number of SME sellers – 48% small and 25% medium.

A successful marketplace attracting many large brands again points to how pivotal this channel is regarded in the region. For many brands, Allegro is the gateway to Poland and its near-neighbours. To tap into this, it operates dedicated 'Brand Zones', which play host to some 120 leading brands from

around the world. Many of these aren't in the European Top1000, suggesting that Allegro's strategy revolves around smaller, less well-known brands to deliver the kind of price-competitiveness that positions Allegro in its regional selling sweet spot.

Of the well-known and Top1000 brands found on the site, many of the most familiar are sportswear and fashion brands, including Adidas, Clarks, Reebok, Puma, Vans and Under Armour.



## Allegro

Features in: Europe Top1000, Germany Top100, Global Elite Top1000, UK Top500

Retail website: allegro.pl

Most significant retail market: Poland

Retail HQ: Poland

Corporation: Allegroeu SA, WA: ALE

Twitter: @allegro\_group

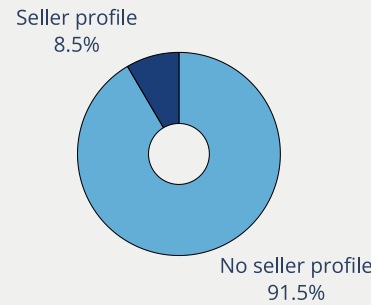


2019 2023

Researched 02-09-2015 to 04-09-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

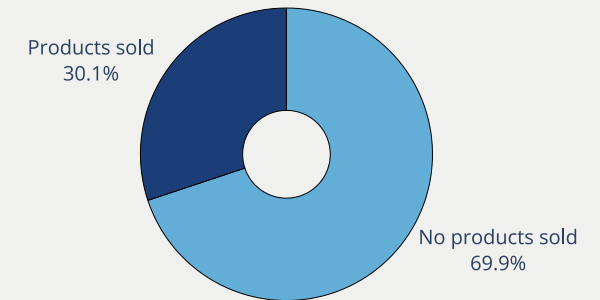
Share of Europe Top1000 retailers with a seller profile on Allegro



Source: RetailX

© RetailX 2023

Share of Europe Top1000 retailers with their products sold on Allegro



Source: RetailX

© RetailX 2023

RXMMPEU23RP-Allegro-AC-2-v1

Europe Top1000 retailers selling on Allegro by sector, 2023

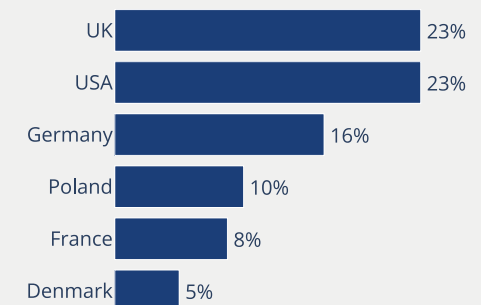


Based on the 83 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023

Europe Top1000 retailers selling on Allegro by headquarters location, 2023



Based on the 83 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023

RXMMPEU23RP-Allegro-AC-4-v2

# eBay

## The 'site for all things' remains the epitome of a pure marketplace that connects buyers and sellers

eBay is one of the pioneers of the marketplaces model, starting life in 1995 as an auction site, evolving to selling second-hand goods and eventually prioritising new items as recently as the early 2010s. With revenues approaching €10bn, it is a major force in ecommerce worldwide. However, where once it was second only to Amazon in Europe, today it has slipped behind Poland's Allegro in terms of sales.

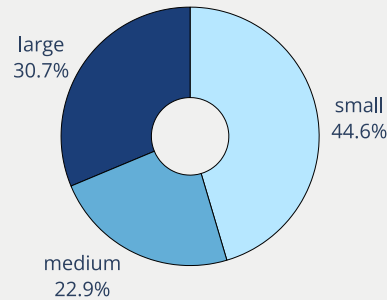
That said, it is a very popular site with European retailers, with 17% of the region's Top1000 having a seller profile on eBay and 44% of them selling products on the site.

With a broad spectrum of items sold, eBay's sales breakdown broadly reflects Europe's wider ecommerce trend, with the majority (35%) of sales being fashion apparel and accessories, followed by consumer electronics (18%) and sports and leisure (11%).

This is just the head of a very long tail, with eBay purportedly selling some 300 categories of goods, many with up to three further sub-categories. It really is the site for all things.

Despite being number three in Europe. eBay is the world's leading pure marketplace globally,

Relative size of Europe Top1000 retailers selling on eBay

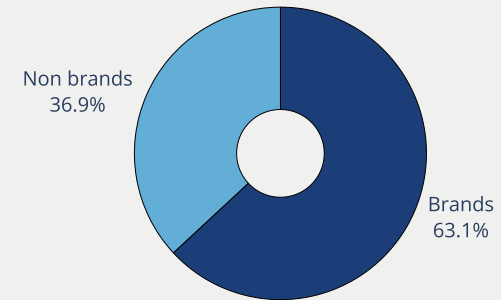


Based on the 168 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eBay-AC-5-v3

Share of Europe Top1000 retailers with their own brand selling on eBay



Based on the 168 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eBay-AC-6-v1

perfecting the model of acting as intermediary between buyers and sellers of any size – with the make up of sellers spread around small (45%), medium (23%) and large (31%) companies. 63% of sellers are brands, 32% of them HQ-ed in the UK. There are also significant numbers based in the US (18%), Germany (14%) and France (5%).

While the platform did well during the pandemic years, eBay has had constantly to evolve its strategy. Most recently, it has sought to become the de facto leader in second-hand and vintage fashion, along with creating a range of 'focus categories' selling higher-end, higher-value items such as branded

trainers, watches and jewellery. Such moves tap into what eBay sees as a growing market for collectibles, which it is keen to service. It has even opened the 3,000m<sup>2</sup>, temperature and humidity-controlled eBay Vault facility where collectors can store their items in optimum, curated conditions while they monitor their value and sell them to other collectors.

The drive towards high end second-hand goods pitches eBay against the growing number of luxury, vintage and collectible sites such as TheRealReal and Vinted. It has also see the company gaining traction with some mainstream luxury brands.



### eBay

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100, UK Top500

**Retail websites:** ebay.co.uk, ebay.de, ebay-kleinanzeigen.de

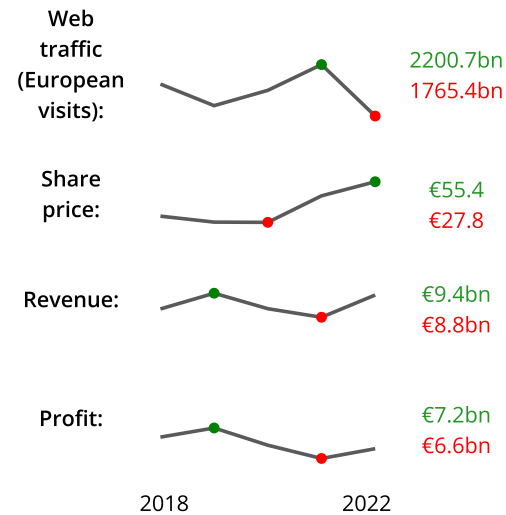
**Most significant retail markets:** Germany, United Kingdom

**Retail HQ:** United States of America

**Corporation:** eBay Inc: EBAY

**Other brands in the group:** GittiGidiyor, Qoo10, BunniesByTheBay, GMarket, Auction

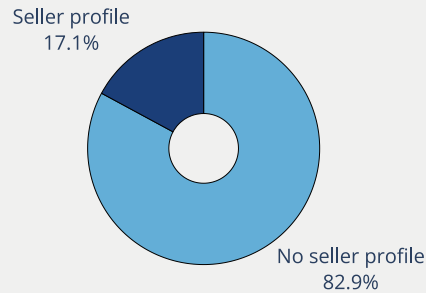
**Twitter:** @ebay



Researched 17-07-2017 to 11-08-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

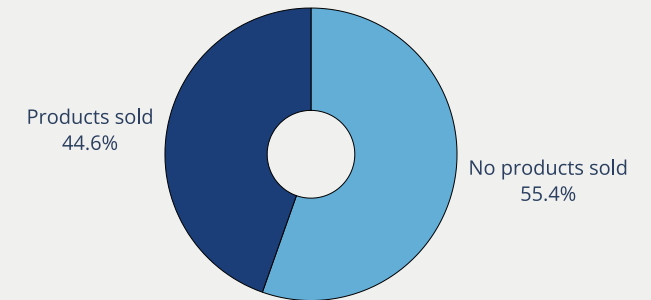
Share of Europe Top1000 retailers with a seller profile on eBay



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eBay-AC-1-v1

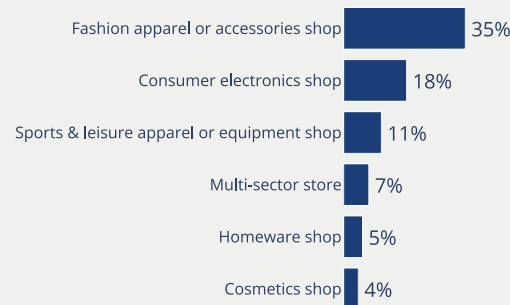
Share of Europe Top1000 retailers with their products sold on eBay



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eBay-AC-2-v1

Europe Top1000 retailers selling on eBay by sector, 2023

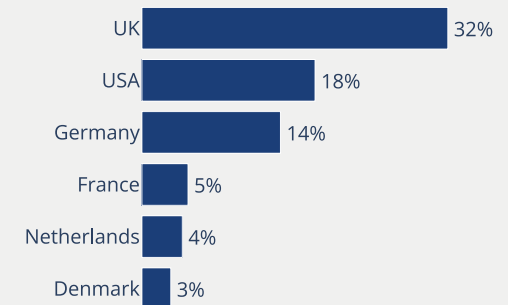


Based on the 168 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eBay-AC-3-v2

Europe Top1000 retailers selling on eBay by headquarters location, 2023



Based on the 168 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eBay-AC-4-v1





# eMAG

## Having pulled out of Poland, eMag is now seeing focused growth in Romania, Hungary and Bulgaria

eMag is the largest marketplace in its native Romania and has a growing presence in Bulgaria and Hungary. It features some 31,000 sellers and attracts around 200mn unique visitors each year from the region.

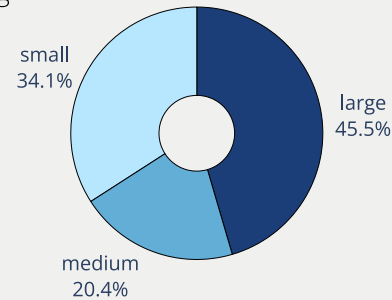
eMag the marketplace is a spin-off from the physical retail store of the same name that has been operating in Romania since 2001. The online iteration now accounts for 35% of the eMag Group's revenues.

Being focused on such a specific part of Europe, the number of Top1000 retailers using the site is unexpectedly low, at just 4.6%. However, this small number belies the fact that goods from 17% of the Top1000 are available on the site.

Of these, 87% are brands and 46% of sellers are large companies. 34% are small and 20% are medium-sized players, reflecting how eMag, despite being relatively small, is seen as an important access point to the markets it serves.

27% of the site's sellers are based in the UK, with 24% in the US. German and Italian companies account, respectively, for 9% and 7% of sales.

Relative size of Europe Top1000 retailers selling on eMag

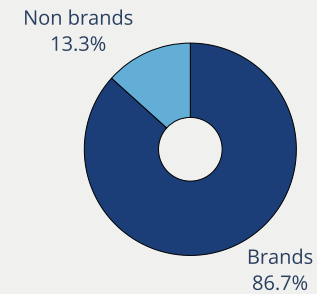


Based on the 45 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

RetailX 2023  
RXMMPEU23RP-eMag-AC-5-v3

Share of Europe Top1000 retailers with their own brand selling on eMag



Based on the 45 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

RetailX 2023  
RXMMPEU23RP-eMag-AC-6-v1

The vast majority (56%) of goods sold on the site are fashion apparel or accessories, with consumer electronics and sports and leisure apparel and goods both accounting for a further 11% apiece.

While a relatively small player in the European marketplace market, eMag is ambitious in its development and expansion plans in the region. In 2021, it opened a network of 500 collection lockers in Budapest, Hungary, to facilitate same-day collection using tech developed in-house.

It also boasts a fleet of electric delivery vehicles and has rolled out a one-hour delivery service in Romania. This forms part of the company's concerted focus on Romania, Hungary and Bulgaria following its withdrawal from the lucrative Polish market in 2021, where the retailer had faced stiff competition from incumbent Allegro.

eMag has also sought to diversify what it sells, expanding its focus from consumer electronics and fashion to also now offer online groceries to customers in Romania.



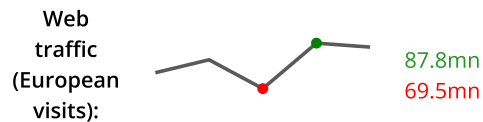
## eMag

Features in: Europe Top1000, Global Elite Top1000

Retail websites: emag.ro, emag.hu, emag.bg

Most significant retail markets: Romania, Hungary, Bulgaria

Retail HQ: Romania

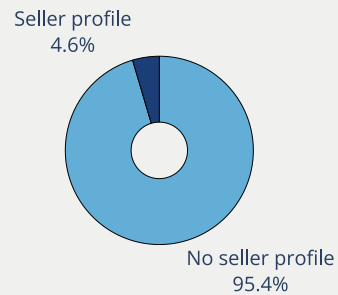


2018 2022

Researched 26-06-2017 to 03-07-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

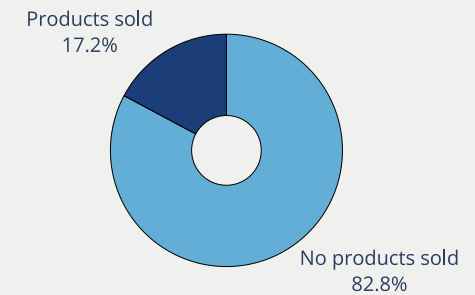
Share of Europe Top1000 retailers with a seller profile on eMag



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eMag-AC-1-v1

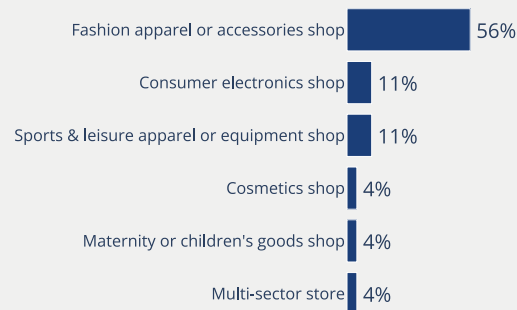
Share of Europe Top1000 retailers with their products sold on eMag



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eMag-AC-2-v1

Europe Top1000 retailers selling on eMag by sector, 2023

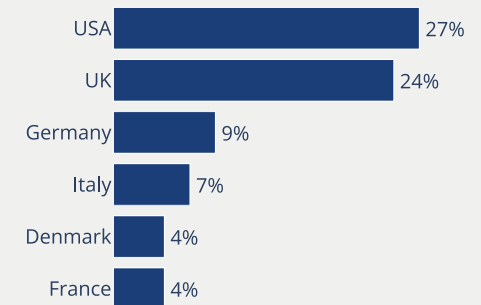


Based on the 45 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eMag-AC-3-v2

Europe Top1000 retailers selling on eMag by headquarters location, 2023



Based on the 45 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-eMag-AC-4-v1

# Etsy

## This dedicated crafts-based US marketplace is attracting both European customers and sellers

Etsy is unusual in the European marketplace space for being one of the only sites dedicated to crafts and handmade, unique items. It is also one of only a very few that are headquartered outside of Europe.

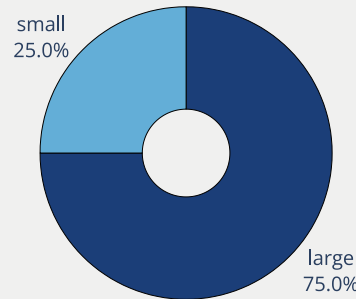
For these reasons, Etsy has a different profile within the market, with virtually none of the Top1000 retailers present on the site, their products instead being sold – albeit in small numbers – by third parties. These products trend towards more craft-related sectors but also cover some types of cosmetics, homewares and stationery products.

The site’s US heritage also sees the majority (50%) of these sellers coming from the US and, as such, the site is a valuable conduit for US sellers wanting to project their alternative products and crafts into the European market.

Being focused on the artisan community, Etsy has a very high number of sellers – 4.3mn in fact, putting Etsy behind only Amazon and OTTO in Europe – but features just nine brands from the RetailX Top500.

As a result, Etsy has the ongoing challenge of policing counterfeits since, with many branded

Relative size of Europe Top1000 retailers selling on Etsy

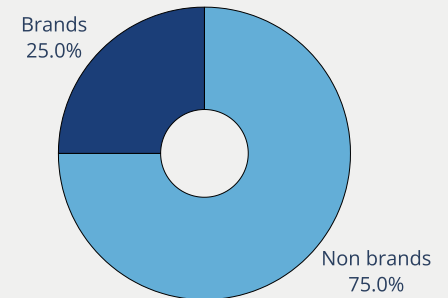


Based on the 4 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

RetailX 2023  
RXMMPEU23RP-Etsy-AC-5-v1

Share of Europe Top1000 retailers with their own brand selling on Etsy



Based on the 4 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

RetailX 2023  
RXMMPEU23RP-Etsy-AC-6-v1

items being at least once removed from their original seller, provenance is hard to establish. It does, however, allow reporting of suspected counterfeits and has a dedicated team to remove them.

The site also faces the challenge of policing copies of original crafts. Individuals who create their own home-made products often come up against other crafters replicating their ideas. This too is policed by Etsy, which runs a fulsome reporting and investigations department to this end.

Etsy, like eBay, is looking to grow what it sees as the increasingly valuable high-end and collectibles side of its business. This has become particularly

prevalent in fashion, where vintage luxury goods are generating significant pass-on sales.

As a result, Etsy is investing in acquiring other sellers to help bolster this side of its business. In 2021, it acquired clothing reseller Depop for \$1.63bn, its largest acquisition to date and one for a business which mirrors Etsy in some respects with its vintage community. This adds to its 2019 purchase of music equipment marketplace Reverb for \$275mn.

Etsy has made it clear in recent results statements that it wants to have a hub of apps that cater towards niche and, in some cases, higher-value ecommerce markets.



**Etsy**

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100, UK Top500

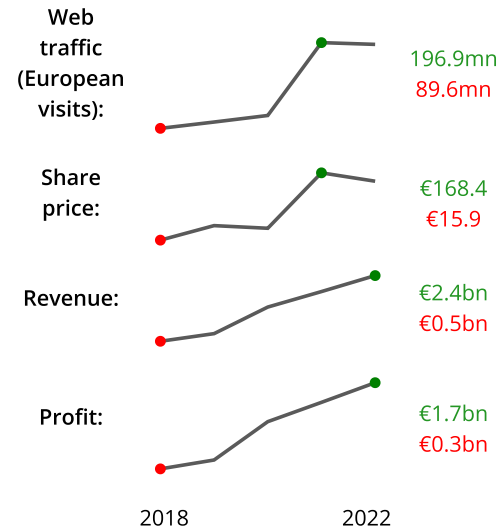
**Retail website:** etsy.com

**Most significant retail markets:** United Kingdom, Germany, France, Italy, Spain

**Retail HQ:** United States of America

**Corporation:** Etsy Inc: ETSY

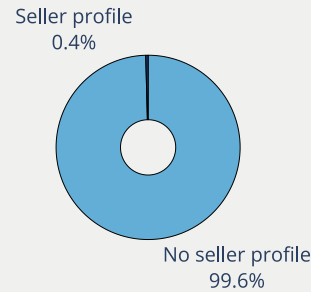
**Other brands in the group:** Reverb, Depop, Elo7



Researched 15-01-2016 to 12-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

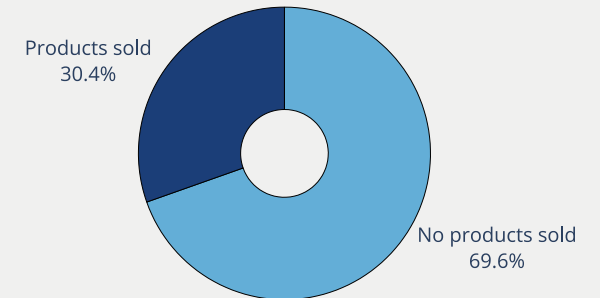
Share of Europe Top1000 retailers with a seller profile on Etsy



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Etsy-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Etsy



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Etsy-AC-2-v1

Europe Top1000 retailers selling on Etsy by sector, 2023

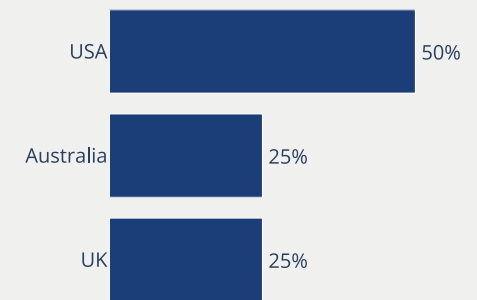


Based on the 4 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Etsy-AC-3-v1

Europe Top1000 retailers selling on Etsy by headquarters location, 2023



Based on the 4 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Etsy-AC-4-v1



# ManoMano

**While this pioneer of online DIY retail, ManoMano has seen stellar growth, competition is now hotting up**

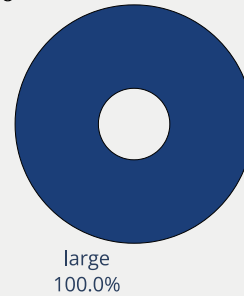
ManoMano has become something of a by-word in Europe for DIY, gardening and home improvements. Launched in France in 2013, the marketplace now operates across Belgium, Germany, Italy, Spain and the UK and has become one of Europe's fastest growing ecommerce sites.

ManoMano was one of the first platforms to look at digitising the until-then rather staid DIY and gardening market. With a core audience that skews towards older age groups, it looked like an uphill task as it sought to onboard a largely non-digital native audience. Yet it succeeded and has, in many ways, revolutionised the DIY retail sector in Europe.

While the site boasts 16mn products from 5,000 sellers, just 0.1% of them are in Europe's Top1000 retailer list. Instead, ManoMano attracts a raft of third-party sellers of well-known brands of equipment, as well as a plethora of smaller players who provide products direct from manufacturers. This is shown in the RetailX Top1000 data.

Since its launch, the European online DIY retail market has shifted. Many new players, not least the UK's B&Q, Amazon and Allegro, have

Relative size of Europe Top1000 retailers selling on ManoMano

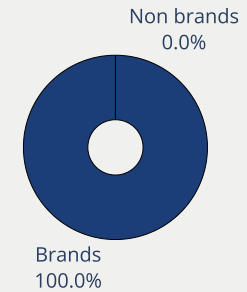


Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-ManoMano-AC-5-v1

Share of Europe Top1000 retailers with their own brand selling on ManoMano



Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-ManoMano-AC-6-v1

entered the market at a regional level and while still one of the leaders in the sector, ManoMano is increasingly just one of many players on a crowded field.

As a result of this competition, ManoMano has diversified and now also runs a business-to-business (B2B) marketplace site, ManoManoPro, that services the building and gardening trade.

This has been expanded across ManoMano's key markets of France, Spain, Italy, Germany and the UK. Between 2022 and 2023, ManoManoPro increased sign-ups by 66% and saw massive sales growth

in power tools (+93%), showers (+66%), radiators (+65%) and toilets (+84%).

Part of ManoManoPro's appeal lies in having tools and materials delivered to work sites. Research in 2021 suggests that tradespeople waste, on average, four hours a day travelling to pick up such items. ManoManoPro's business model based around deliver aims to tackle this.



## ManoMano

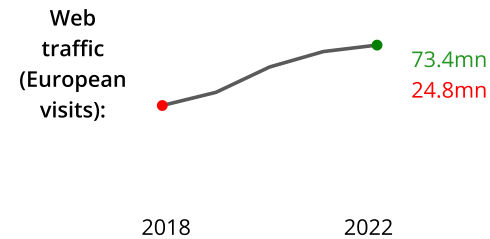
**Features in:** Europe Top1000, Global Elite Top1000, Spain Top100, UK Growth 2000, UK Top500

**Retail websites:** manomano.fr, manomano.it, manomano.de

**Most significant retail markets:** France, Italy, Germany

**Retail HQ:** France

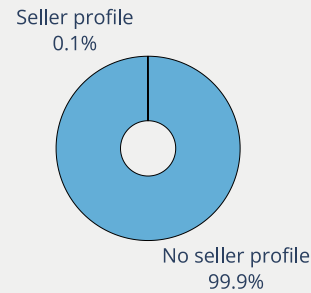
**Twitter:** @manomano\_fr



Researched 21-11-2017 to 05-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

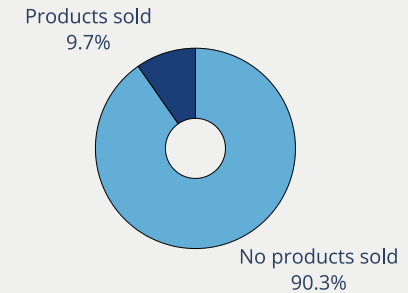
Share of Europe Top1000 retailers with a seller profile on ManoMano



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-ManoMano-AC-1-v1

Share of Europe Top1000 retailers with their products sold on ManoMano



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-ManoMano-AC-2-v1

Europe Top1000 retailers selling on ManoMano by sector, 2023



Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-ManoMano-AC-3-v1

Europe Top1000 retailers selling on ManoMano by headquarters location, 2023



Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-ManoMano-AC-4-v1

# OnBuy

**Relatively new to the market, OnBuy is looking to break the dominance of Amazon in the UK and beyond**

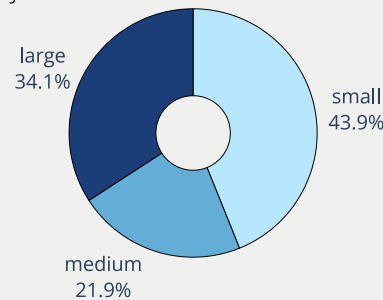
Ranked in 2022 by the *Financial Times* as Europe’s fastest-growing ecommerce business and 25th overall fastest-growing business in Europe, the UK’s OnBuy is a relatively new player in the marketplace space, yet is already making its mark.

Launched in 2016, OnBuy has modelled itself on being the purest of pure marketplaces, pledging never to sell its own goods and always to act as an easy-to-use and transparent way to connect buyers and sellers of all sizes.

Featuring in excess of 35mn products, the site focuses mainly on smaller and medium-sized sellers by traffic, which account for just under 66% of the European Top1000 sellers on the site. Of these, 93% are brands selling directly through the marketplace to its customers and generating revenues of around €14mn in 2021.

19.7% of Europe’s Top1000 retailers have products available to buy on the site. This reflects OnBuy’s pledge to offer the best deals to both sellers and buyers, offering a platform that it says gives each better value when using it and provides some much needed competition in the UK market for merchants not wanting to be tied to the dominant force in UK marketplace

Relative size of Europe Top1000 retailers selling on OnBuy.com

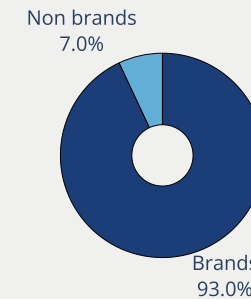


Based on the 43 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-OnBuy.com-AC-5-v2

Share of Europe Top1000 retailers with their own brand selling on OnBuy.com



Based on the 43 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-OnBuy.com-AC-6-v1

ecommerce, Amazon. The relatively low level of European Top1000 players on the site reflects how the site is growing organically through this process.

In due course, as it becomes ever-more successful, it is likely that these larger brands will also gravitate to using the site, so this position is set for a dramatic change between now and 2025.

Given the relative newness of UK-based OnBuy and its focus on its own domestic market, it follows that a majority (42%) of sellers are based in the UK. Yet it does feature sellers from Germany (9%), France (7%), Italy (7%) and the US (26%).

As with many general marketplaces – those that sell a wide range of goods, rather than focusing on a specific niche – OnBuy sees the bulk of its sales (44%) coming from fashion apparel and accessories. Sports and leisure (14%), consumer electronics (12%) and cosmetics (12%) are also popular.



### OnBuy

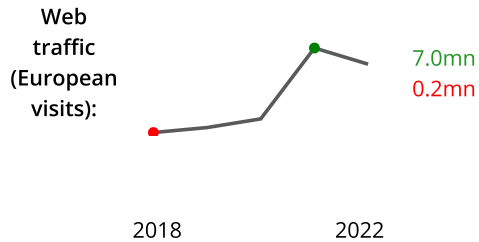
Features in: Europe Top1000, UK Growth 2000, UK Top500

Retail website: onbuy.com

Most significant retail market: United Kingdom

Retail HQ: United Kingdom

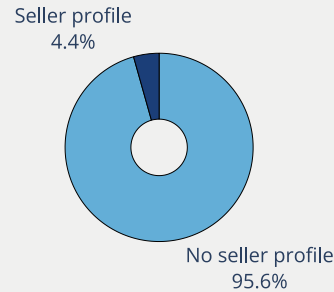
Twitter: @onbuy



Researched 22-05-2020 to 06-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

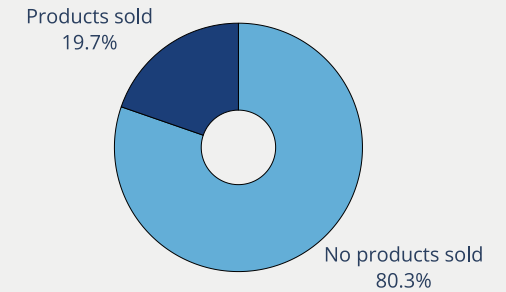
Share of Europe Top1000 retailers with a seller profile on OnBuy.com



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-OnBuy.com-AC-1-v1

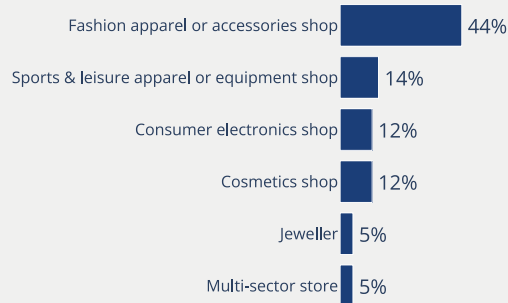
Share of Europe Top1000 retailers with their products sold on OnBuy.com



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-OnBuy.com-AC-2-v1

Europe Top1000 retailers selling on OnBuy.com by sector, 2023

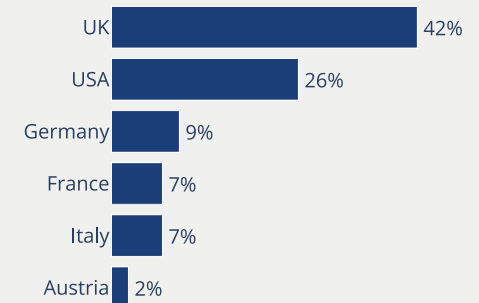


Based on the 43 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-OnBuy.com-AC-3-v2

Europe Top1000 retailers selling on OnBuy.com by headquarters location, 2023



Based on the 43 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-OnBuy.com-AC-4-v1



# OTTO

## One of Europe's largest retailers continues to grow its online business thanks to its marketplace

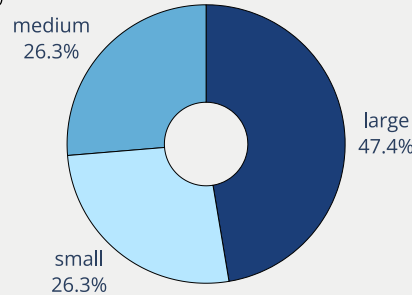
More than 70 years after its starting as a shoemaker in post-war Germany, OTTO has become one of the largest retailers in Europe, generating revenues of around \$17bn in 2022. Online, it is the second-largest seller in Germany behind Amazon, with ecommerce accounting for \$12bn of sales – 70% of its income.

While OTTO is a retailer in its own right, it is open to partners through its OTTO Marken marketplace. Launched in 2019 as a rebrand of its existing partner programme, the marketplace site was created to rapidly and extensively expand the range of items OTTO can sell.

This has put around 7mn sellers and brands in front of OTTO's 10mn customers and generated some 95mn visits in 2022, from all over the world, demonstrating how the marketplace has expanded the reach of OTTO's core offering out to a much wider geographical audience.

Of the sellers on OTTO Marken, 2% of Europe's Top1000 retailers and brands have a profile and around 8% of sales on the site come from these sellers. The rest is made up of a very long tail of suppliers and smaller players that use the site

Relative size of Europe Top1000 retailers selling on Otto

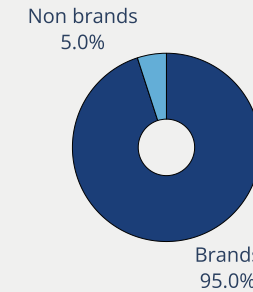


Based on the 20 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Otto-AC-5-v2

Share of Europe Top1000 retailers with their own brand selling on Otto



Based on the 20 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Otto-AC-6-v1

to reach OTTO's enormous German as well as its worldwide audiences.

Almost all (95%) of the Top 1000 sellers that use OTTO are brands, while 47.7% are considered large retailers. The other 52.3% are SMEs, reflecting the importance of OTTO to selling in the key markets in which it operates.

Of these companies that use OTTO, the largest share (30%) come from the US, with OTTO's compatriots in Germany accounting for a further 25%. UK-based retailers account for 20% of the total. The rest is a

long tail of retailers, with a significant proportion (5% apiece) coming from companies based in Japan and South Korea, again showcasing OTTO's reach.

Another reason why the marketplace is so successful is that it has stringent requirements for sellers wanting to appear on the OTTO marketplace, giving those brands that do appear a great competitive position in the German market. OTTO Marken also features some of the best filter options of any ecommerce website and so offers great 'find' potential when consumers are searching by brand or by product.



### Otto

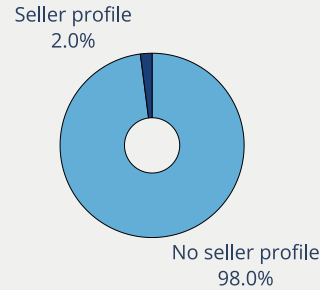
**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000  
**Retail website:** otto.de  
**Most significant retail market:** Germany  
**Retail HQ:** Germany  
**Corporation:**  
**Other brands in the group:** MyToys, Limango, Bonprix, Crate & Barrel



2018 2022  
 Researched 02-09-2015 to 03-07-2023  
 Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

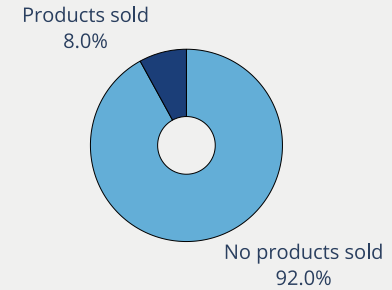
Share of Europe Top1000 retailers with a seller profile on Otto



Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Otto-AC-1-v1

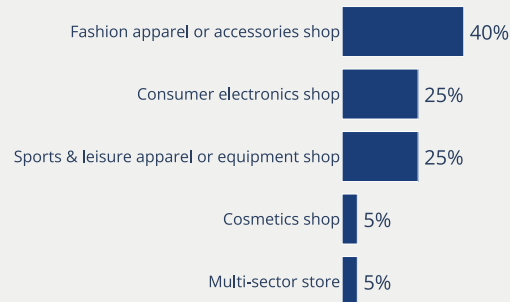
Share of Europe Top1000 retailers with their products sold on Otto



Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Otto-AC-2-v1

Europe Top1000 retailers selling on Otto by sector, 2023

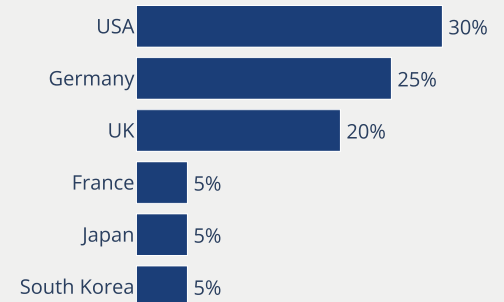


Based on the 20 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Otto-AC-3-v2

Europe Top1000 retailers selling on Otto by headquarters location, 2023



Based on the 20 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Otto-AC-4-v1





## Refurbed

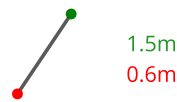
**Retail website:** [refurbed.de](https://refurbed.de), [refurbed.at](https://refurbed.at), [refurbed.ch](https://refurbed.ch), [refurbed.fr](https://refurbed.fr), [refurbed.nl](https://refurbed.nl)

**Most significant retail market:** Germany, Austria, Switzerland, France, Netherlands

**Retail HQ:** Austria

**Twitter:** @refurbed

**Web traffic (European visits):**

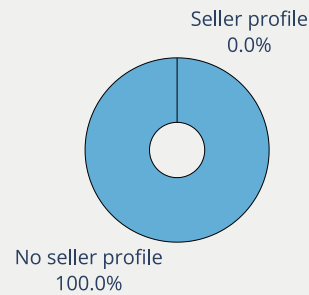


2019 2023

Researched 13-11-2022 to 04-09-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

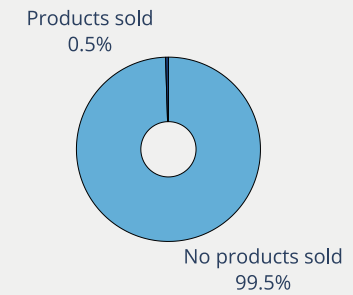
Share of Europe Top1000 retailers with a seller profile on Refurbed



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Refurbed-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Refurbed



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Refurbed-AC-2-v1

## Refurbed

**One of a new breed of marketplaces exploiting demand for second-hand, Refurbed sees strong growth**

Tapping into the growing market for pre-loved and re-loved goods that's being driven by environmental concerns as well as the rising cost of living, Refurbed is a marketplace dedicated to selling reconditioned consumer electronics across more than a dozen European markets. Founded in 2017 and headquartered in Vienna, Austria, the company employs over 150 remote workers across Europe.

Refurbed recently raised €17mn in funding as it taps into a rapidly growing market. Generic marketplaces such as eBay and Fnac already see around 30% of their electronics sales coming from refurbished goods, so the demand is clear and sustained.

As well as servicing the burgeoning market for pre-loved electronics – which prevents a lot of workable electronic components from needlessly ending up in landfill – the company cements its sustainability image by promising to plant a tree for every item it sells.



## Temu

Retail website: temu.com

Retail HQ: United States

Corporation: PDD Holdings Inc, NASDAQ: PDD

Twitter: @shoptemu

Web traffic (European visits):

-  
-

Share price:

140.1  
€26.1

Revenue:

€18.0bn  
€3.9bn

Profit:

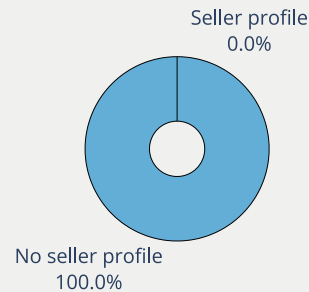
€13.7bn  
€3.1bn

2019 2023

Researched 02-09-2015 to 04-09-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

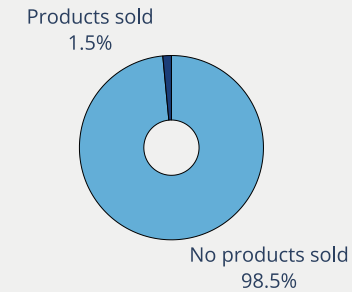
Share of Europe Top1000 retailers with a seller profile on Temu



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Temu-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Temu



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Temu-AC-2-v1

## Temu

**After taking China by storm, the self-styled 'ultimate discount site' is now growing quickly across Europe**

Chinese marketplace Temu is part of a new crop of marketplaces that have taken the price competitiveness of marketplaces to new heights and to their central core by offering goods at often absurdly low prices. Much of this is achieved by leveraging another rising trend seen in Chinese marketplaces of selling and then shipping direct from the manufacturers.

This, in part, helps keep the prices on the site at such a low level. Being almost wholly supplied from these factories, almost no European Top1000 retailers sell on the site. Indeed, many see Temu as a threat to their businesses since it so ruthlessly and effectively undercuts all competitors.

Consumers, however, are loving the site and customer numbers are rapidly growing across Europe. Already boasting in excess of 100mn customers in the US, Temu expanded into Europe in 2023 and now operates in France, Germany, Italy, The Netherlands, Spain and the UK.





## Wish

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100, UK Top500

**Retail website:** wish.com

**Most significant retail markets:** Italy, Germany, United Kingdom, France, Sweden

**Retail HQ:** United States of America

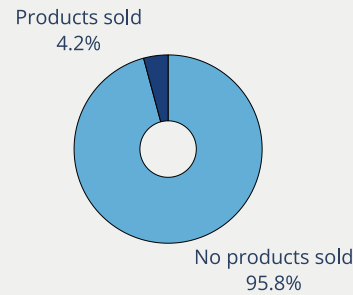


2018 2022

Researched 07-03-2017 to 05-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

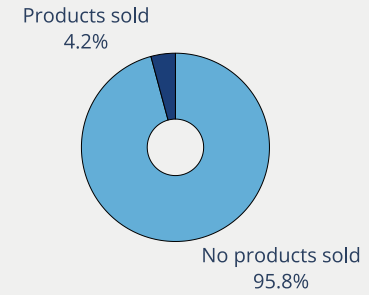
Share of Europe Top1000 retailers with their products sold on Wish



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Wish-AC-2-v1

Share of Europe Top1000 retailers with their products sold on Wish



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Wish-AC-2-v1

## Wish

**With 600 million customers, Wish is certainly a hit with shoppers, yet merchants are less enamoured with it**

San Francisco-based Wish is a mobile-first, app-based marketplace operating across 60 countries which connects 250,000 merchants globally to a customer base in excess of 600mn customers who have already signed up to it.

The pure marketplace sells everything from hair extensions to laptops and beyond, from brands

both obscure and well known. Yet in Europe, just 4% of the Top1000 retailers and brands sell products directly on the site.

This is due in part to the site attracting a good deal of negative press for being seen as selling a large amount of counterfeit goods, as well as selling items that fail to meet EU quality and safety codes. This latter issue saw Wish de-listed from Google search results in France in 2021, although it was subsequently relisted in 2023 following a change in management and some tightening up of its policies.



# Amazon

## The site that, for many, defines the marketplace concept still leads the world in ecommerce and fulfilment

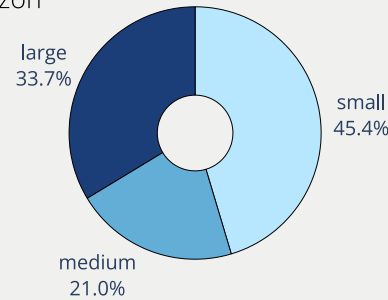
Amazon is not only one of the biggest marketplaces in the world, is also one of the largest ecommerce retailers, generating a whopping €489bn in revenues in 2022 and making a profit in excess of €64bn.

Operating across most European countries to some degree, its major markets are the UK, Germany, Italy and France. Traffic from Europe topped an astonishing four *trillion* visits in 2021, its peak year, and while this cooled slightly in 2022, it still remains the most-visited ecommerce site in the region.

For this reason, Amazon understandably attracts a high proportion of Europe's Top1000 retailers and brands, with 22% of them having a seller profile and a third of the Top1000 selling products directly in the site. Many leading brands and products from well-known retailers are also sold by third parties through Amazon.

However, Amazon hosts more than 10mn sellers, as well as selling its own branded goods – across perhaps the broadest range of categories of any marketplace anywhere – so the proportion of Top1000 brands on the site appears low at 69% relative to other marketplaces. This still encompasses a vast

Relative size of Europe Top1000 retailers selling on Amazon

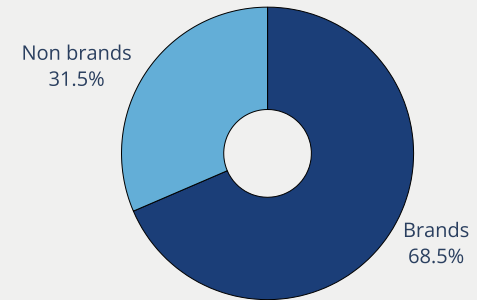


Based on the 213 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Amazon-AC-5-v3

Share of Europe Top1000 retailers with their own brand selling on Amazon



Based on the 213 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Amazon-AC-6-v1

number of well-known retail brands from companies small (45%), medium (21%) and large (33.7%).

Indicative of the wider ecommerce landscape, fashion apparel and accessories is the leading category on Amazon, accounting for 36% of sales. Consumer electronics is the next most popular, accounting for 15%. Again, these numbers belie just how large and wide-ranging Amazon is. These categories are just the leading ones, ahead of a very long tail of sectors on the site. While each one makes up only a tiny percentage of total sales, given the overall size of Amazon's market, these incremental sales are themselves enormous markets.

It is worth noting that Amazon has built up a strong position in fulfilment services, with delivery and logistics operations that straddles the globe, Amazon also operates its own payments services so for merchants of all sizes, Amazon offers the full 'soup to nuts' for online selling, marketing, payment, delivery, collection and return.

On top of all this, Amazon owns and operates a video-on-demand service as part of its extensive Prime subscription offering and has carved out a strong presence for itself in the electronics space with a range of home gadgets such as the Firestick and Alexa-based home hub.



### Amazon

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100, UK Top500

**Retail websites:** amazon.de, amazon.co.uk, amazon.fr, amazon.it

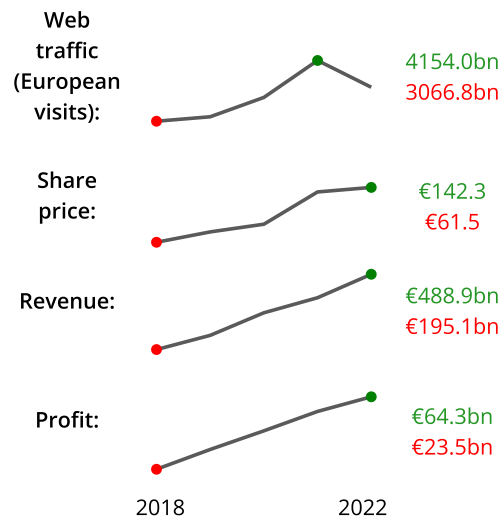
**Most significant retail markets:** Germany, United Kingdom, Italy, France

**Retail HQ:** United States of America

**Corporation:** Amazon.com, Inc.: AMZN

**Other brands in the group:** Audible, Shopbop, Zvab, Woot, AbeBooks, Ring, Zappos, Souq, Umbra

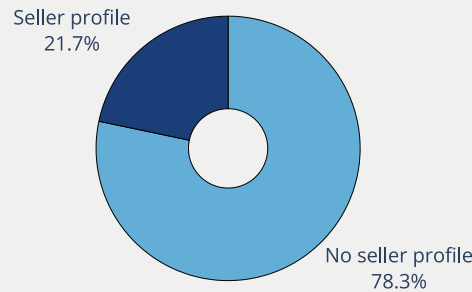
**Twitter:** @amazon



Researched 02-09-2015 to 08-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

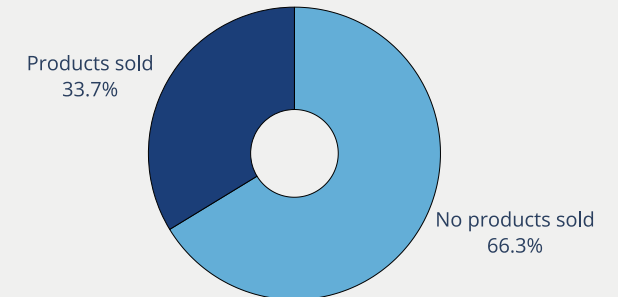
Share of Europe Top1000 retailers with a seller profile on Amazon



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Amazon-AC-1-v1

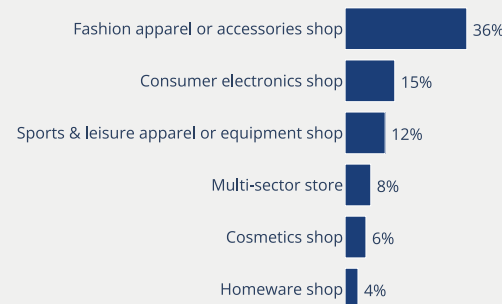
Share of Europe Top1000 retailers with their products sold on Amazon



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Amazon-AC-2-v1

Europe Top1000 retailers selling on Amazon by sector, 2023

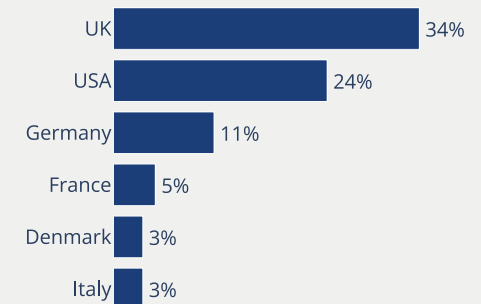


Based on the 213 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Amazon-AC-3-v3

Europe Top1000 retailers selling on Amazon by headquarters location, 2023



Based on the 213 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Amazon-AC-4-v2



# Bol.com

## Cornering the Dutch and Belgian ecommerce markets, Bol.com is a distinctly local affair

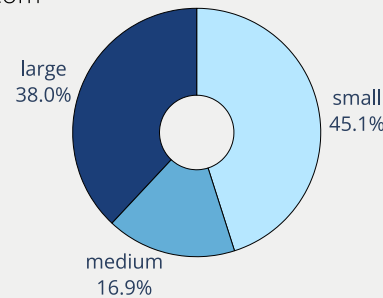
Bol.com was established in 1999 in Holland by German retail conglomerate Bertelsmens with the sole goal of tapping into the then-nascent Dutch ecommerce market. It now lists around 11mn items from Bol.com’s own brand alongside those from 50,000 third-party brands and sellers.

It attracts an impressive 225mn visitors each year and is currently the largest domestic marketplace in Holland and Belgium, generating €87bn in revenues in 2022, a figure up 27% on the previous year.

The site has not only effectively cornered the ecommerce market in Holland and Belgium, it has also played a significant role in preventing Amazon or any of the other large international marketplace from entering the Dutch market.

Focusing heavily in being local – from the conscious choice of only Dutch or French on the site, to the brands it sells – has also helped cement the site in the market which it serves. This local focus is reflected in the 7.5% share of Europe’s Top1000 retailers that list on the site.

Relative size of Europe Top1000 retailers selling on Bol.com

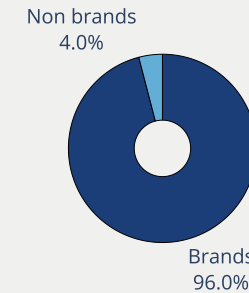


Based on the 74 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Bol.com-AC-5-v2

Share of Europe Top1000 retailers with their own brand selling on Bol.com



Based on the 74 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Bol.com-AC-6-v1

While the marketplace prides itself on being local, just 7% of the brands that sell on the site are actually headquartered in the Netherlands, with more than a third actually based in the UK. A further 10% of retailers on the site are French or German.

Of the many brands and retailers that do sell on the site, 51% are selling fashion apparel and accessories, with a long tail of all other categories spreading down from 9% selling consumer electronics and cosmetics to 4% homewares.

An impressive 96% are brands, evenly split between large (38%) and small (45%), with the rest medium players. The bulk of sellers on Bol.com have their own storefronts on the site, marking Bol out as one marketplace that gives its sellers significantly greater control over how they manage their site presence.

This approach also marks Bol.com out as a marketplace with very low levels of counterfeit items for sale, due to the brands themselves constantly and diligently maintaining and policing their own presence, products and image.



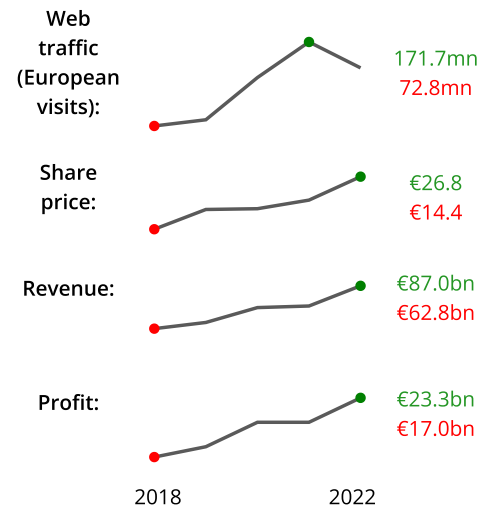


### Bol.com

Features in: Europe Top1000, Global Elite Top1000, UK Growth 2000  
 Retail website: bol.com  
 Most significant retail markets: Netherlands, Belgium  
 Retail HQ: Netherlands  
 Corporation: Koninklijke Ahold Delhaize NV, AS: AD

Other brands in the group: Albert Heijn, Etos, Stop&Shop, Fresh Direct

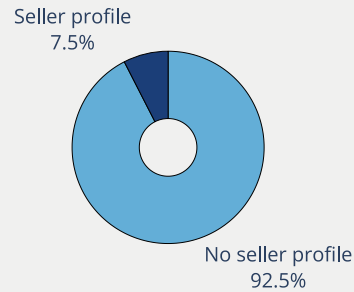
Twitter: @bol\_com



2018 2022  
 Researched 10-05-2016 to 03-07-2023  
 Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

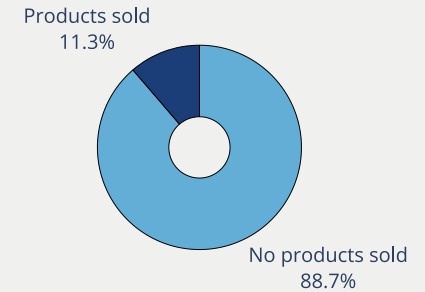
Share of Europe Top1000 retailers with a seller profile on Bol.com



Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Bol.com-AC-1-v1

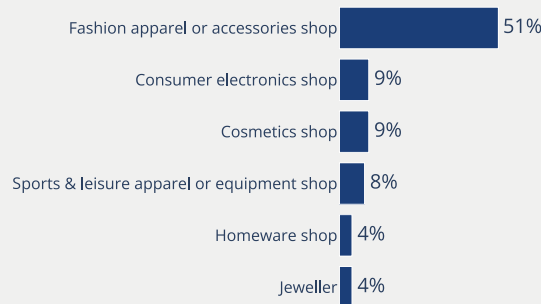
Share of Europe Top1000 retailers with their products sold on Bol.com



Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Bol.com-AC-2-v1

Europe Top1000 retailers selling on Bol.com by sector, 2023

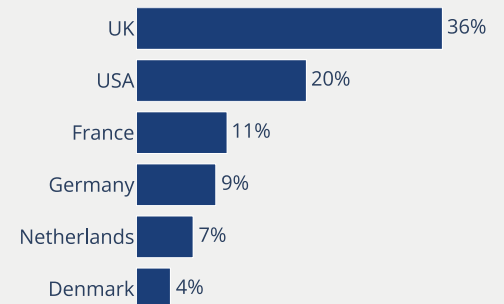


Based on the 74 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Bol.com-AC-3-v2

Europe Top1000 retailers selling on Bol.com by headquarters location, 2023



Based on the 74 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Bol.com-AC-4-v1

# Boots

## A very new marketplace gives this very old retailer a new lease of life online, expanding its customer base

Soft launched in 2022 and live in 2023, Boots Marketplace is a newcomer to the marketplace market. It's also one of a fresh crop of retailer-run marketplaces designed to help an existing retailer expand its online offering to attract new customers and grow revenues by adding new categories and revenue streams.

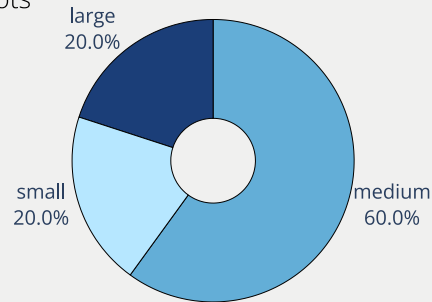
Boots, a leading seller of health and beauty in the UK, offers any brand of any size the opportunity, albeit by invitation, to seamlessly list their products on the Boots.com website – a site which has, through this process, morphed into being a marketplace.

This gives these brands access to Boots' existing 25mn European visitors. The move mirrors the retailer's expansion of the brands it now sells instore, giving access to a range of smaller and niche 'cult' cosmetic and health brands.

Working with Mirakl, the retailer has created a Software-as-a-Service (SaaS) platform that integrates its marketplace and main site, giving consumers a single shopping experience and checkout.

The marketplace move aims to allow Boots to expand the range of health and beauty

Relative size of Europe Top1000 retailers selling on Boots

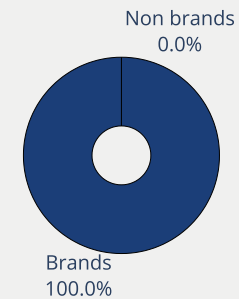


Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Boots-AC-6-v1

Share of Europe Top1000 retailers with their own brand selling on Boots



Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Boots-AC-6-v2

products it sells, tapping into a lucrative and expanding market, quickly and relatively easily. This tactic is increasingly being adopted by retailers across Europe as they seek to digitally transform rapidly in order to keep up with changing consumer habits.

While it's still too early to garner any really meaningful data, the site has so far attracted products from 4% of Europe's Top1000 retailers, many of them listed as fashion apparel or accessories. This showcases how Boots Marketplace is already allowing the retailer to offer more than just its core health and beauty products, adopting a range of goods that appeal to a wider audience.

The companies selling on the site are predominantly medium sized (60%), with large and smaller retailers taking 20% each of offerings.

Most, as might be expected from a site that predominantly targets the UK market only, are based in the UK. However, a significant number (20% apiece) of US and French-based firms shows how a growing proportion of these brands are likely to be in the cosmetics and luxury sectors. All of them are brands, since Boots is using its marketplace to sell branded products to augment its existing ranges across its inventory stack.



**Boots**

Features in: Europe Top1000, Global Elite Top1000, UK Top500

Retail website: boots.com

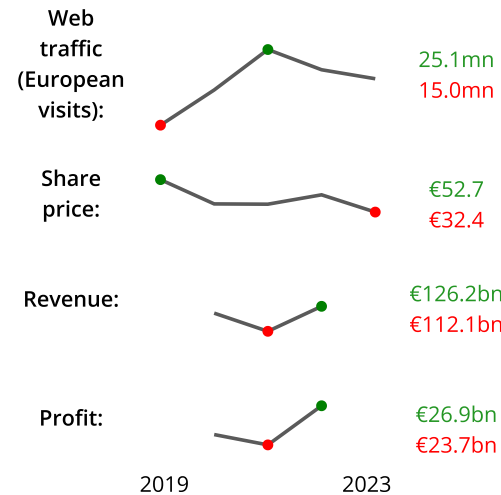
Most significant retail market: United Kingdom

Retail HQ: United Kingdom

Corporation: Walgreens Boots Alliance Inc, NASDAQ: WBA

Other brands in the group: Walgreens, Duane Reade, Benavides, Ahumada

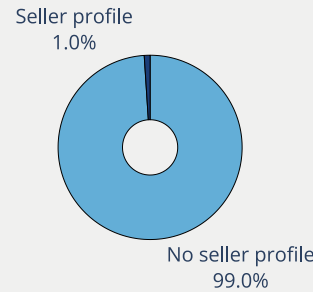
Twitter: @bootsuk



Researched 02-09-2015 to 04-09-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

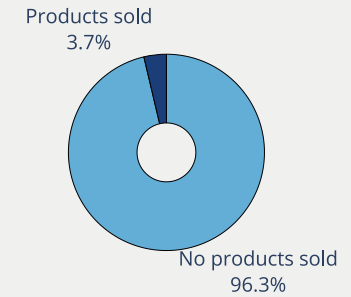
Share of Europe Top1000 retailers with a seller profile on Boots



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Boots-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Boots



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Boots-AC-2-v1

Europe Top1000 retailers selling on Boots by sector, 2023

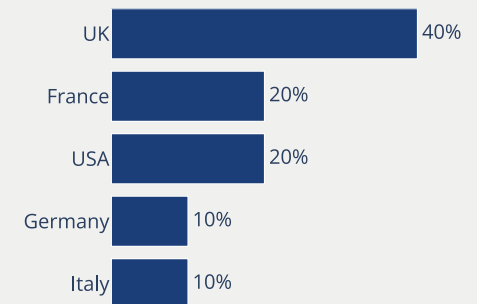


Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Boots-AC-3-v1

Europe Top1000 retailers selling on Boots by headquarters location, 2023



Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Boots-AC-4-v1





## B&Q

**Features in:** Europe Top1000, Global Elite Top1000, UK Top500

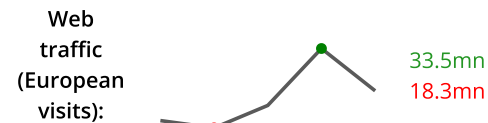
**Retail website:** diy.com

**Most significant retail market:** United Kingdom

**Retail HQ:** United Kingdom

**Other brands in the group:** Screwfix, Koctas, Brico Depot, Castorama

**Twitter:** @bandq

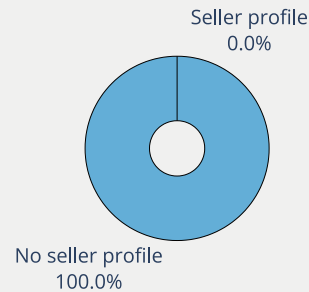


2018 2022

Researched 02-09-2015 to 16-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

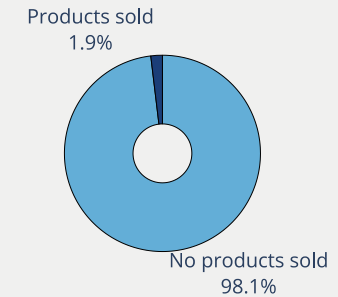
Share of Europe Top1000 retailers with a seller profile on B&Q



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-B&Q-AC-1-v1

Share of Europe Top1000 retailers with their products sold on B&Q



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-B&Q-AC-2-v1

## B&Q

**Retailer-run marketplace has grown online sales eight-fold and now takes a quarter of B&Q's ecommerce sales**

One of the UK's best known DIY and home improvement retailers – it enviably owns the URL DIY.com – is one of the UK's leading examples of a retailer adopting a marketplace approach in order to rapidly expand its digital offering.

Launched in March 2022, the B&Q Marketplace offered customers an expanded choice of more than 300,000 products from some 400 verified sellers. Initially, much of this simply expanded many of the categories the retailer already sold – wallpaper,

lighting and power tools – but as the marketplace has developed and grown, it has allowed B&Q to add new category ranges to its roster. These include small electrical appliances, cook and tableware, which have broadened the retailer's reach beyond DIY materials and into homewares.

B&Q's marketplace has also seen an eight-fold increase in sales of DIY equipment and power tools and, as of February 2023, B&Q Marketplace accounted for 24% of B&Q's total ecommerce sales.

For brands and sellers, the marketplace adds a valuable new channel, putting B&Q's enormous online audience in front of their products. The retailer allows these third-party sellers to use the retailer's 300-plus UK stores to return goods, aiding in one of the challenging aspects of online selling.





## Carrefour

Features in: Europe Top1000, Global Elite Top1000, Spain Top100

Retail websites: carrefour.fr, carrefour.es

Most significant retail markets: France, Spain

Retail HQ: France

Other brands in the group: Planeta Huerto, Candy

Twitter: @CarrefourFrance

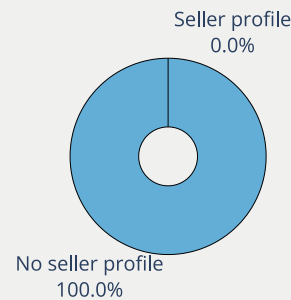


2018 2022

Researched 02-09-2015 to 03-07-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

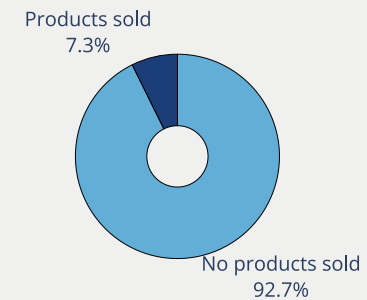
Share of Europe Top1000 retailers with a seller profile on Carrefour



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Carrefour-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Carrefour



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Carrefour-AC-2-v1

## Carrefour

### The expansion to 300 SME sellers has expanded this food giant's online presence to over 300,000 products

French hypermarket chain Carrefour was one of the pioneers of retailer-owned marketplaces, launching its food marketplace in June 2020 and making specialist and artisan foods from more than 100 independent retailers available to the 38.4mn people who visit the main Carrefour.fr site each year.

Yet this huge number of sellers has grown rapidly and, as of 2022, was in excess of 300, offering more than 300,000 products.

Typically aimed at small and startup food producers, the site attracts a very low number of brands from the European Top1000. However, it has attracted great interest from sellers worldwide and now offers – by invitation only – access to Carrefour shoppers in both France and Spain.

The site is particularly appealing to such small retailers because there are no setup or monthly fees, Carrefour taking instead a commission on sales of between 7% and 20%. This fee doesn't cover fulfilment, shipping or returns – all of which have to be additionally handled by the seller.

# Cdiscount

## France's second-largest marketplace branches out into multiple categories while also addressing sustainability

Having grown rapidly since the own-goods retailer launched a marketplace in 2011, Cdiscount is currently the second-largest marketplace in France after Amazon.fr. It sells more than 40mn products across 2,000 subcategories from 13,000 merchants to around 9mn active customers, who made some 87mn visits in 2022. Every month, one out of every four French households visits the website.

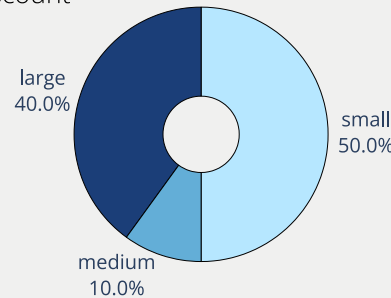
As a result, the company generated €4.1bn in 2021. Although the bulk of its sales are made in France, Cdiscount continues to grow as it services more than 70 markets worldwide.

Currently, some 18% of Europe's Top1000 retailers and brands sell on the site. However, they are just part of the 'endless carousel' and 1% or fewer have an actual seller profile.

That said, all are listed, searched and sold by brand and come from a broad range of companies spanning large players (40%), medium players (10%) and small sellers (50%).

Unlike most general marketplaces in Europe, Cdiscount's largest sector is consumer electronics, which accounts for 30% of sales. It is in this category where leading brands – typically

Relative size of Europe Top1000 retailers selling on Cdiscount

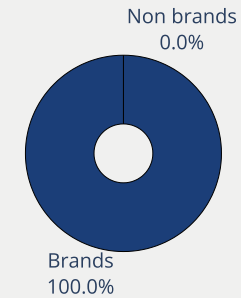


Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Cdiscount-AC-6-v1

Share of Europe Top1000 retailers with their own brand selling on Cdiscount



Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Cdiscount-AC-6-v1

Apple, Samsung, Motorola *et al* – have a branded presence. The rest are just part of the category lists.

Reflecting the generalist nature of Cdiscount, cosmetics, DIY and construction, along with sports and leisure apparel and equipment, all account for 20% each of sales on the site. Food sales take up 10%. These companies tend not to have a seller profile on the site.

For most sellers, Cdiscount charges a flat monthly fee of €39.99 to list before charging a sliding scale of commission based on the value of the goods and level of sales.

Aside from its stature in the French ecommerce market, Cdiscount has become something of a pioneer of sustainable online retail in the country. In 2019, it piloted a new type of reusable packaging for deliveries and returns.

It has also worked hard to cut the carbon emissions of its logistics operations, partnering with Agrikolis to allow shoppers in remote rural areas to collect parcels from *de facto* click and collect hubs in local farms. Increased automation in its warehouses to streamline processes and cut packaging waste are a further example of its sustainability commitments.



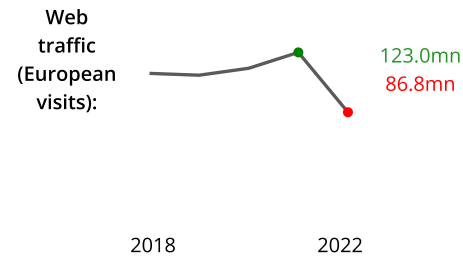
### Cdiscount

Features in: Europe Top1000, Global Elite Top1000

Retail websites: cdiscount.com, clients.cdiscount.com

Most significant retail market: France

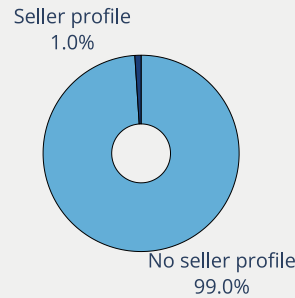
Retail HQ: France



Researched 02-09-2015 to 11-08-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

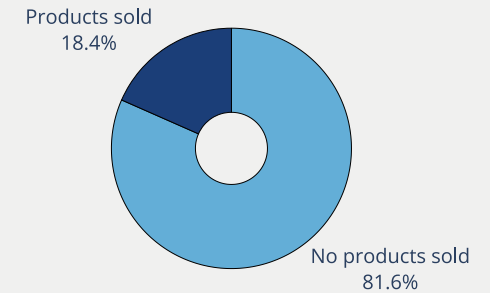
Share of Europe Top1000 retailers with a seller profile on Cdiscount



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Cdiscount-AC-1-v1

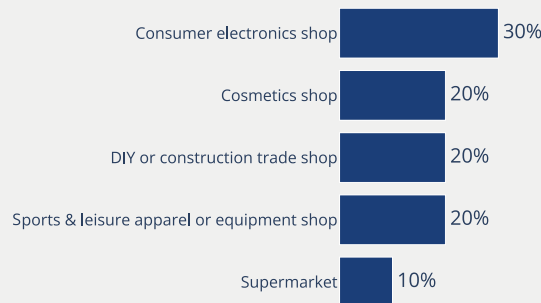
Share of Europe Top1000 retailers with their products sold on Cdiscount



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Cdiscount-AC-2-v1

Europe Top1000 retailers selling on Cdiscount by sector, 2023

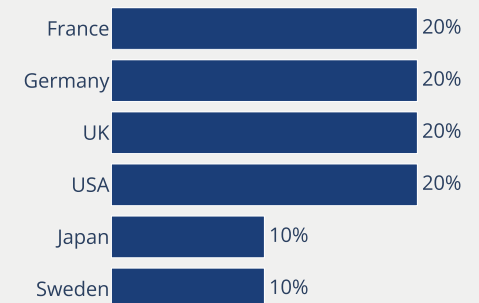


Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Cdiscount-AC-3-v2

Europe Top1000 retailers selling on Cdiscount by headquarters location, 2023



Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Cdiscount-AC-4-v1

# Decathlon

**An early advocate of retailer-run marketplaces, Decathlon has seen a huge growth in its ecommerce sales**

France-based Decathlon is the largest sports goods specialist retailer in the world, selling everything from walking, climbing equipment and yoga gear to boxing clothing, bikes, helmets and cyclewear.

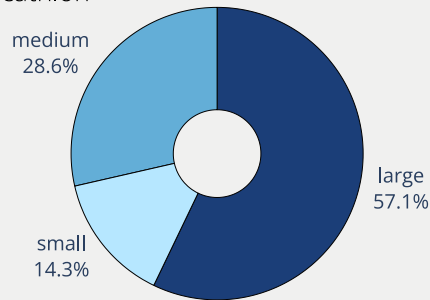
Until 2019, it was predominantly a physical retailer selling largely own-brand items that were designed and produced in conjunction with a range of global suppliers. However, in 2019, presciently ahead of the pandemic, the company took the decision to create its own marketplace to run alongside its nascent online offering.

As with all retailer-run marketplaces – of which it was an early advocate – the plan was to augment existing product lines with third-party sold and fulfilled goods.

Piloted in Belgium in 2020, expanded to the UK later that year and now operating across Europe, the Decathlon marketplace currently sells some 200,000 additional products from around 1,500 brands.

Of these, 4% are among Europe’s Top1000 retailers, all of which are brands typically specialising in sports and leisure apparel

Relative size of Europe Top1000 retailers selling on Decathlon

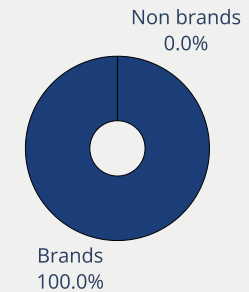


Based on the 8 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Decathlon-AC-5-v3

Share of Europe Top1000 retailers with their own brand selling on Decathlon



Based on the 8 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Decathlon-AC-6-v1

and equipment (62%) and fashion apparel and accessories (38%). This is indicative of how the plan to augment existing ranges has managed to leverage the sportswear and athleisurewear trend.

Many of the companies from the Top1000 are US based, outlining how Decathlon’s move to open up its marketplace has created a new market and a vast European audience for many of them.

While the marketplace has been a boon for brands and retailers, it has had nothing short of a transformative effect on Decathlon. Not only has it moved from non-marketplace player to being one

of the largest marketplaces in Europe, it’s also seen its average basket size double, pushing this once physical-first retailer to see 21% of its 2021 sales come from ecommerce.

The marketplace now acts as a bridge between the physical and digital worlds. While its clients still go into stores to buy the company’s core ranges, they are then propelled to look online for the goods and brands that can augment physical sales.





## Decathlon

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100, UK Top500

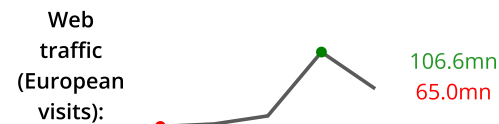
**Retail websites:** decathlon.fr, decathlon.pl, decathlon.es, decathlon.net, decathlon.it

**Most significant retail markets:** France, Spain, Poland, Italy, Germany

**Retail HQ:** France

**Other brands in the group:** All Tricks

**Twitter:** @Decathlon

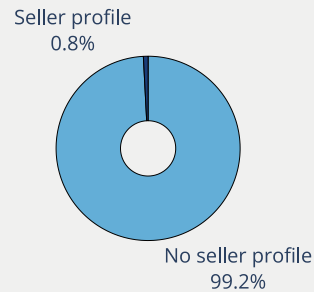


2018 2022

Researched 02-09-2015 to 15-08-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

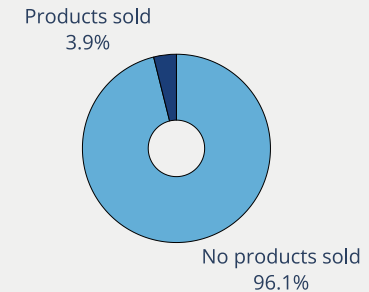
Share of Europe Top1000 retailers with a seller profile on Decathlon



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Decathlon-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Decathlon



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Decathlon-AC-2-v1

Europe Top1000 retailers selling on Decathlon by sector, 2023

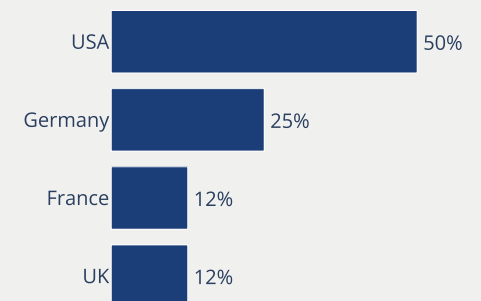


Based on the 8 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Decathlon-AC-3-v2

Europe Top1000 retailers selling on Decathlon by headquarters location, 2023



Based on the 8 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Decathlon-AC-4-v1

# Fnac

## Specialist in 'cultural goods' for entertainment, Fnac works with top brands to deliver customer service

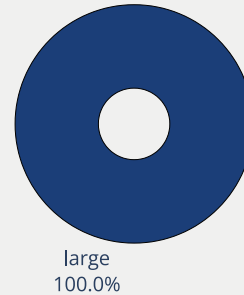
Fnac is France's largest seller of what it calls 'cultural goods' – media, entertainment and electronics to the rest of us. In 2009, it was one of the first retailers in the country to create its own retailer-run marketplace.

Initially only for French customers, it has spread across neighbouring countries and now services an audience spread across Northern Europe, parts of the Middle East and into West Africa.

Following the merger with its biggest competitor Darty in 2016, which saw the two companies' retail and marketplace sites combine, Fnac is now the second-largest marketplace in France behind Amazon. In 2022, it attracted 72mn visitors and generated \$8bn in revenues.

Focused on selling mid-end to high-end products in the relatively specialised media and entertainment niche, Fnac features around 4,000 retailers, of which 10% are in Europe's Top1000. All of these are large brands and 80% are selling consumer electronics, 40% of these Top1000 brands are HQ-ed in the US, with 20% in Japan and 20% in South Korea. These represent the biggest names in electronics – Apple, Samsung, Sony and Microsoft.

Relative size of Europe Top1000 retailers selling on Fnac

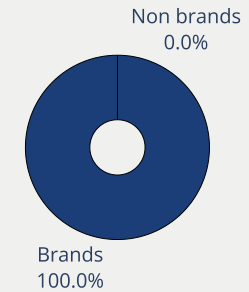


Based on the 5 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Fnac-AC-5-v1

Share of Europe Top1000 retailers with their own brand selling on Fnac



Based on the 5 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Fnac-AC-6-v1

The site doesn't offer merchants a dedicated store front, relying instead on shoppers seeing Fnac as synonymous with high-end consumer electronics. This approach gives these premium brands surprisingly little control over how they appear.

Yet those brands selling on the site do, however, get a dedicated account manager, are promoted in banners and sales promotions and Fnac will also incorporate the brands it works with into its social media plans.

Fnac has a good reputation for customer service, which helps these brands sell on the site. For example, sellers must be able to provide after-sales

support in French and reply within 24 hours to customer enquiries.

The company operates a testing centre, where it evaluates new products for technical quality, ease of use, price and the important (for the French consumer especially) "price/quality ratio", making comparisons among similar products.

Fnac presents its findings to customers both in its store displays and through the chain's *Contact* member magazine. The company is quite willing to point out technical and other deficiencies in products and is even willing to withdraw those products it considers unsatisfactory from its stores.



### Fnac

**Features in:** Europe Top1000, Global Elite Top1000, Spain Top100

**Retail websites:** fnac.com, secure.fnac.com, fnac.pt

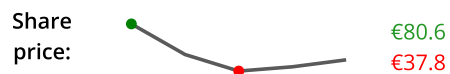
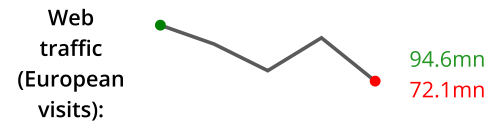
**Most significant retail markets:** France, Portugal

**Retail HQ:** France

**Corporation:** Fnac Darty SA, PA: FNAC

**Other brands in the group:** Vanden Borre, Darty, Nature & Découvertes, WeFix by FNAC

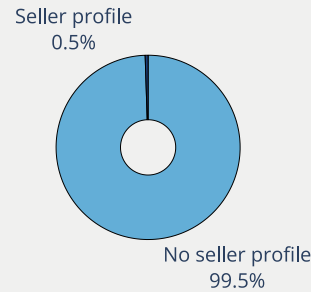
**Twitter:** @Fnac



2018 2022  
 Researched 02-09-2015 to 05-06-2023  
 Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

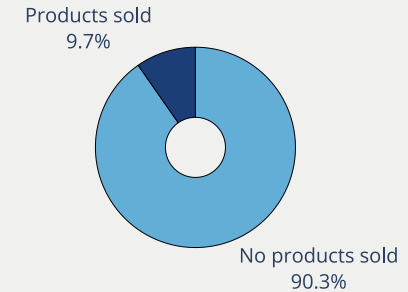
Share of Europe Top1000 retailers with a seller profile on Fnac



Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Fnac-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Fnac



Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Fnac-AC-2-v1

Europe Top1000 retailers selling on Fnac by sector, 2023

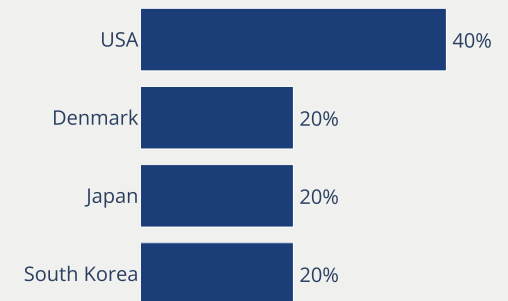


Based on the 5 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Fnac-AC-3-v1

Europe Top1000 retailers selling on Fnac by headquarters location, 2023



Based on the 5 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
 RXMMPEU23RP-Fnac-AC-4-v1



# Leroy Merlin

## How one of Europe's largest DIY retailers added a marketplace to stave off pandemic competition

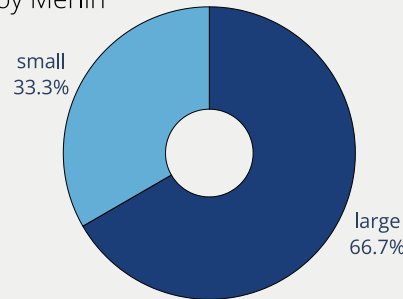
Leroy Merlin, Europe's third largest DIY retailer, pivoted its online presence to embrace a marketplace model in 2022, when, faced with a surge in online DIY sales during the pandemic, it saw that rivals such as ManoMano and Amazon were tapping into this swelling market with vigour.

As a result, the company – which turned over €9.8bn in 2022 – did what a growing number of retailers in Europe have done and looked to rapidly expand its product range and reach by creating a third-party marketplace to sell alongside its core business. This move has also allowed Leroy Merlin to meet consumer demand for rapid deliveries.

However, it is still relatively early days in its marketplace journey for the retailer. Currently, just 3% of Europe's Top1000 brands and retailers are selling on the site, with 67% of those that do being headquartered in China.

The site also sells around 33% of non-branded goods. This is partly due to the low number of DIY brands in the European Top1000 and partly down to Leroy Merlin's relative lateness in adding a marketplace.

Relative size of Europe Top1000 retailers selling on Leroy Merlin

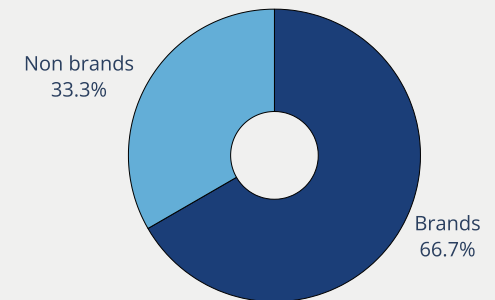


Based on the 3 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Leroy Merlin-AC-5-v1

Share of Europe Top1000 retailers with their own brand selling on Leroy Merlin



Based on the 3 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Leroy Merlin-AC-6-v1

None of the brands have dedicated profiles on Leroy Merlin, instead being sold through the Leroy Merlin storefront. A tiny proportion (0.3%) have a storefront profile, which represents some homewares and some consumer electronics – mostly DIY gadgets – that exist because they are products outside the main run of what the company sells. The rest just appear on the site, listed by category.

However, Leroy Merlin's approach is to offer the best range of products at a wide range of prices, so shoppers are typically shopping by what they want and how much they are prepared to spend, rather than by brand name.

That's not to say, however, that many of the goods sold on Leroy Merlin aren't brands. Being one of the largest DIY sites in Europe means that most well-known brands are present.

Recently, the retailer has courted controversy due to its presence in both Russia and Ukraine. In 2022, its store in Kyiv was completely destroyed by a Russian missile, yet the company took until 2023 to pull out of the Russian market. It has now ceased or suspended operations in both countries.



## Leroy Merlin

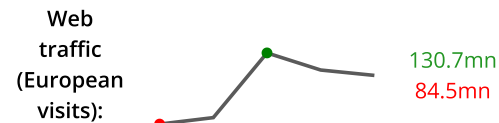
Features in: Europe Top1000, Global Elite Top1000, Spain Top100

Retail websites: leroymerlin.fr, leroymerlin.es, leroymerlin.pl, leroymerlin.it

Most significant retail markets: France, Spain, Poland, Italy

Retail HQ: France

Twitter: @leroymerlinfr

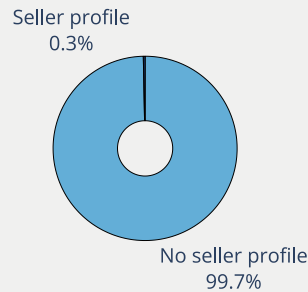


2019 2023

Researched 02-09-2015 to 01-09-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

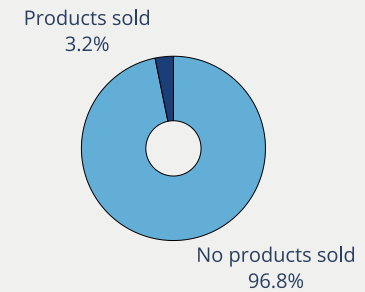
Share of Europe Top1000 retailers with a seller profile on Leroy Merlin



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Leroy Merlin-AC-1-v1

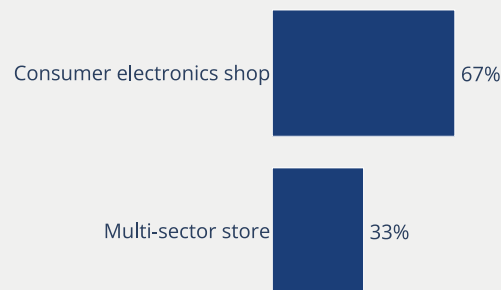
Share of Europe Top1000 retailers with their products sold on Leroy Merlin



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Leroy Merlin-AC-2-v1

Europe Top1000 retailers selling on Leroy Merlin by sector, 2023

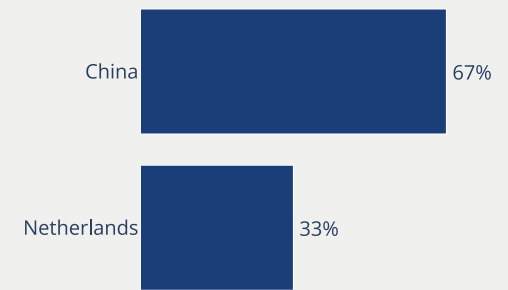


Based on the 3 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Leroy Merlin-AC-3-v1

Europe Top1000 retailers selling on Leroy Merlin by headquarters location, 2023



Based on the 3 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Leroy Merlin-AC-4-v1

# Lidl

## Is it a supermarket or a marketplace? Lidl is both, actually, and its marketplace business is thriving

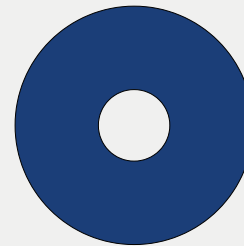
Lidl is a curious case of a retailer that is both a marketplace and not a marketplace. Owned by German retail giant Schwarz Gruppe, Lidl is best known as a supermarket across great swathes of Europe.

Yet it makes the European marketplaces list because, unlike rival supermarkets that derive the bulk of their ecommerce revenues from online delivery and click and collect of food, Lidl's online business is focused solely on the non-food items it sells, all of which come from third-party suppliers. So, while it is an online supermarket of sorts, it also plays host to selling other goods and is, therefore, deemed a marketplace.

The company has built on this foundation over the past two years, with the purchase by Schwarz of Real.de, one of Germany's biggest marketplaces. While not yet playing a direct role in Lidl's operations, Real.de is part of the wider group's plans to grow its marketplace business. Lidl is sure to play a key role in this, alongside spontaneously other large retailer, Kaufland, which also runs a marketplace.

This could set up the group to be a strong rival in Germany to OTTO and to Amazon.de.

Relative size of Europe Top1000 retailers selling on Lidl



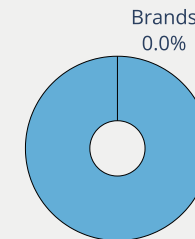
large  
100.0%

Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Lidl-AC-5-v1

Share of Europe Top1000 retailers with their own brand selling on Lidl



Non brands  
100.0%

Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Lidl-AC-6-v1

However, at this early stage, the strategy for Lidl, Kaufland and the Schwarz Gruppe is yet to be seen.

That said, it has also grown to be one of the largest ecommerce stores in the region, selling €100bn in 2022 and has built a massive online following of 147mn visitors a year. Lidl already sells goods from 1.7% of Europe's Top1000 retailers on its site. Fewer than 1% have a profile on Lidl's marketplace, simply having their goods for sale.

The whole Schwarz Gruppe has also moved into shipping in a bid to 'own' the supply chain for its brands – a bid to stave off bottlenecks seen across retail supply since the Russian invasion of Ukraine.

As part of this, the group chartered three container ships in 2022 and pledges to buy a fourth.

It has already set up its own shipping line. Tailwind Shipping started operation in Autumn 2022 and marks a move by the retailer to take greater control over its supply chain.

Many retailers have complained that shipping companies have sought to profiteer from the post-Covid supply chain problems, so it looks as though Lidl has taken matters into its own hands. It is believed that the ships will form a Lidl-branded supply line between Asia and Europe that will also be open to use by other retailers.





## Lidl

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100

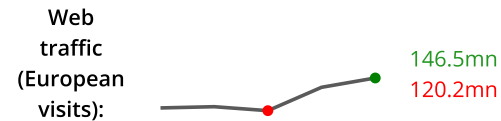
**Retail websites:** lidl.de, lidl.pl, lidl.cz, lidl.fr, lidl.com

**Most significant retail markets:** Germany, Poland, Czechia, France, Spain

**Retail HQ:** Germany

**Other brands in the group:** Kaufland

**Twitter:** @lidl

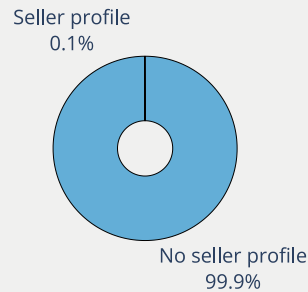


2018 2022

Researched 02-09-2015 to 07-07-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

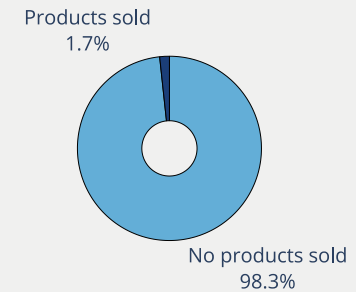
Share of Europe Top1000 retailers with a seller profile on Lidl



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Lidl-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Lidl



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Lidl-AC-2-v1

Europe Top1000 retailers selling on Lidl by sector, 2023



Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Lidl-AC-3-v1

Europe Top1000 retailers selling on Lidl by headquarters location, 2023



Based on the 1 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Lidl-AC-4-v1



# MediaMarkt

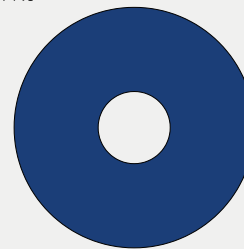
**This truly omnichannel seller has worked hard on cornering the DACH consumer electronics market**

Germany's MediaMarkt is one of the largest electronics retailers in Europe. Until 2021, it predominantly sold via a network of 1,000 stores across Germany, Austria, Spain, Italy, Poland and The Netherlands. However, in 2021, parent company Ceconomy looked to shift the business to be more omnichannel by creating MediaMarkt Saturn Marketplace following a trial in Germany in 2020.

This plan to expand the company's reach, both geographically and into the digital realm, appears to be paying off. As of the end of July 2023, the company already had around 1,060 third-party resellers listing on MediaMarkt, with a total of nearly 1.2mn products on its platform. Third quarter results for the 2022/23 financial year logged increasing sales by 7.4% year-on-year to around €4.5bn.

Being focused on consumer electronics sees MediaMarkt Saturn servicing just a small number of Europe's Top1000 brands and retailers through this marketplace. Just 6% are represented, driven by the company's focus on mainstream electronics brands, which account for 86% of Top1000 sales on the site. The lion's share (29%) of these brands are US-based, with an equal 14% representation of Top1000

Relative size of Europe Top1000 retailers selling on Media Markt



large  
100.0%

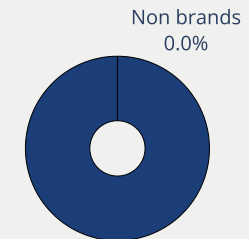
Based on the 7 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023

RXMMPEU23RP-Media Markt-AC-5-v2

Share of Europe Top1000 retailers with their own brand selling on Media Markt



Brands  
100.0%

Based on the 7 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023

RXMMPEU23RP-Media Markt-AC-6-v1

brands from Japan, South Korea, Taiwan, Germany and Switzerland.

This, however, doesn't fully reflect the breadth of what the marketplace sells, with the site offering products from all the key consumer electronics and white goods brands, Many of these are widely recognised even though they live outside the Top1000 because they are reasonably niche.

What the site does offer is very close management of its suppliers. It tends to take goods direct from manufacturers and brands, so has a very limited exposure to piracy and counterfeiting. As a result, it doesn't offer much in the way of seller protection.

The company is also at the forefront of using technology in its operations. With the growth of its international footprint in the DACH region and beyond, along with the growing use of marketplaces, the retailer has spent a lot of time and money unifying its customer data so that it is coherent across all channels, providing a deep understanding of customers and delivering better personalisation than seen in many other ecommerce sites.

The retailer has also developed its own bespoke range of apps for its store staff, which have seen rapid rises of click and collect offerings, instore demos and staff product knowledge.





## Media Markt

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100

**Retail websites:** mediamarkt.de, mediamarkt.es, mediaworld.it, mediamarkt.pl, mediamarkt.nl

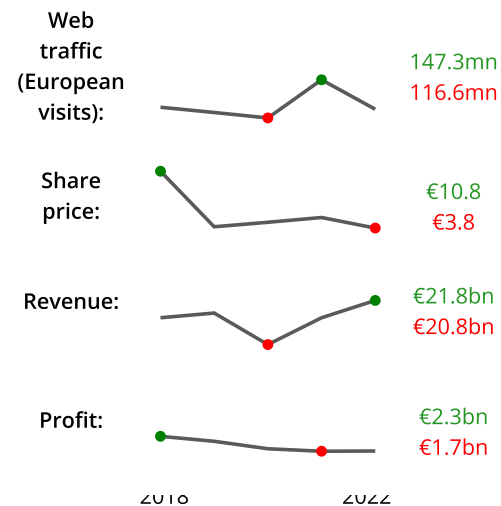
**Most significant retail markets:** Germany, Spain, Italy, Poland, Netherlands

**Retail HQ:** Germany

**Corporation:** Ceconomy AG, DE: CEC

**Other brands in the group:** Saturn

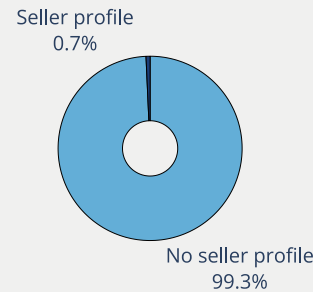
**Twitter:** @MediaSaturn



Researched 02-09-2015 to 14-08-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

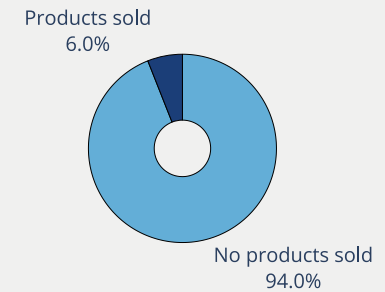
Share of Europe Top1000 retailers with a seller profile on Media Markt



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Media Markt-AC-1-v1

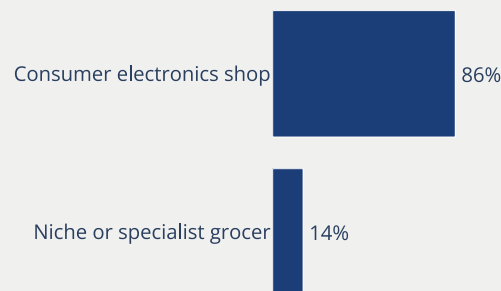
Share of Europe Top1000 retailers with their products sold on Media Markt



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Media Markt-AC-2-v1

Europe Top1000 retailers selling on Media Markt by sector, 2023

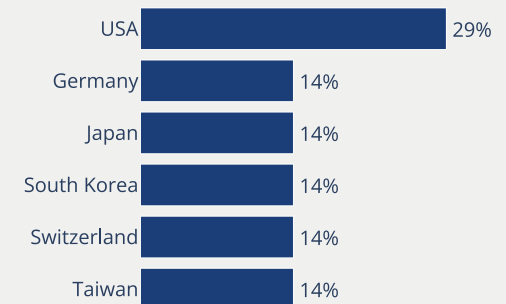


Based on the 7 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Media Markt-AC-3-v1

Europe Top1000 retailers selling on Media Markt by headquarters location, 2023



Based on the 7 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Media Markt-AC-4-v1

# Superdrug

**This pioneering UK health & beauty marketplace aims to be the champion of both SMEs and startup brand**

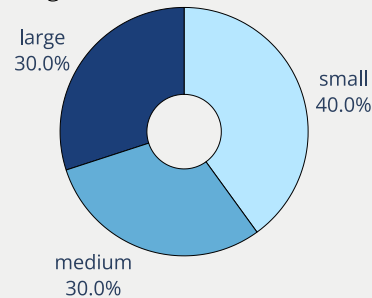
Claiming to be the UK’s first high street health and beauty retailer to have a marketplace – and beating Boots to the draw by a matter of weeks – the drive to create Superdrug Marketplace was the same as for any retailer: to rapidly expand online inventory and grow customer base as shoppers pivot to online. However, it has also been used as a means to helping promote and sell small, niche and startup health and beauty brands.

For these smaller brands, Superdrug Marketplace offers the chance to leverage the larger company’s online presence and delivery infrastructure in order to grow sales – something that many startups and niche players struggle to achieve cost-effectively on their own.

And it appears to be a successful strategy for Superdrug. As a result, after being in operation for a year at the time of writing, the platform has 300 brands signed up.

Of these, many are, as said, smaller, niche players such as skincare brand UpCircle Beauty, Women’s razor brand FFS Beauty and makeup brand Jecca Blac.

Relative size of Europe Top1000 retailers selling on Superdrug

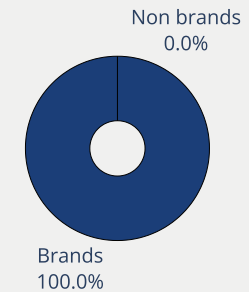


Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace. Small=Less than 10 mn annual visits, Medium= 10-100 mn annual visits, Large=More than 100 mn annual visits

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Superdrug-AC-5-v1

Share of Europe Top1000 retailers with their own brand selling on Superdrug



Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Superdrug-AC-6-v1

However, 3.6% of Europe’s Top1000 retailers are also present on the site, with half of them UK based. Traditional – and more luxury orientated cosmetics brands – based in Italy and France also make a showing, at 20% and 10% respectively.

This lack of ‘big names’ is all part of the plan, according to Superdrug, which positions the marketplace as the ideal platform to bring new brands to market, to help support startups in the health and beauty sector and to give a wider platform to black-owned brands – something the retailer has been focusing on instore for a number of years.

While there are obvious sales and revenue benefits in running a marketplace alongside its existing business, Superdrug is also positioning itself as wanting to be seen as the next logical step in ecommerce growth for startups in the sector – an interesting and worthy approach to growth in an increasingly crowded sector.



## Superdrug

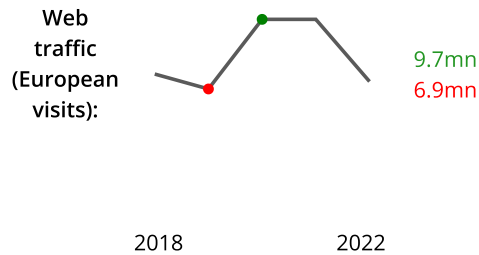
Features in: Europe Top1000, Global Elite Top1000, UK Top500

Retail website: [superdrug.com](https://superdrug.com)

Most significant retail market: United Kingdom

Retail HQ: United Kingdom

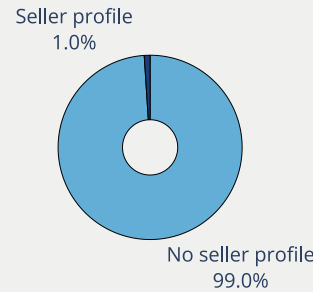
Twitter: @superdrug



Researched 02-09-2015 to 05-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

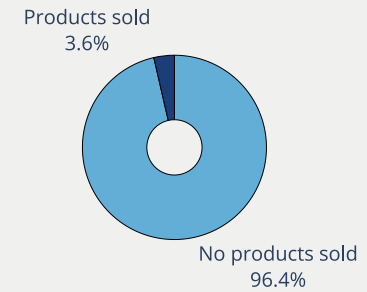
Share of Europe Top1000 retailers with a seller profile on Superdrug



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Superdrug-AC-1-v1

Share of Europe Top1000 retailers with their products sold on Superdrug



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Superdrug-AC-2-v1

Europe Top1000 retailers selling on Superdrug by sector, 2023

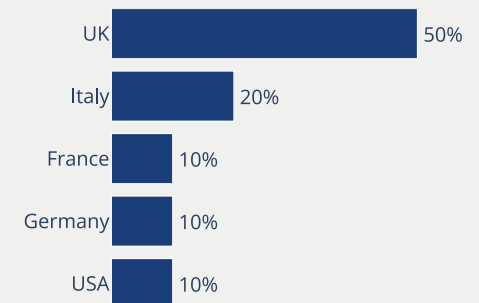


Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Superdrug-AC-3-v3

Europe Top1000 retailers selling on Superdrug by headquarters location, 2023



Based on the 10 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Superdrug-AC-4-v1

# Zalando

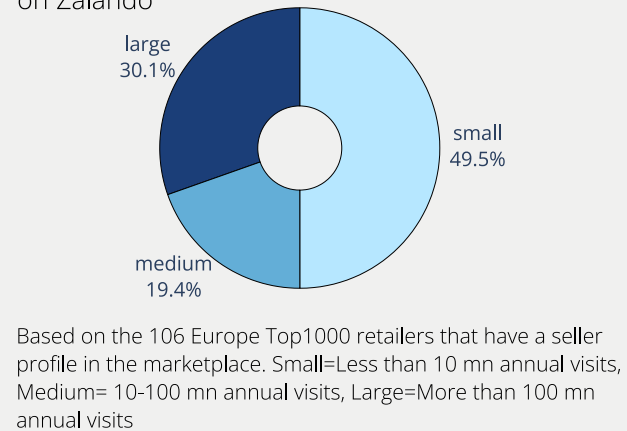
## European fashion marketplace giant has its work cut out to stay dominant in the highly competitive fashion sector

Zalando has become a byword for online fashion in Europe and is one of the most successful of many global fashion-specific marketplaces to have sprung up in recent years. Combining the growing love of online fashion shopping – particularly among younger, digitally-native shoppers – and the advantages brands and consumers see in the marketplaces model, it is no surprise that Zalando now boasts more than 7,000 brands selling to more than 51mn active customers in 25 countries.

More than 10% of Europe’s Top1000 retailers and brands have a seller profile on Zalando, with 18% of the Top1000 actively selling products on the site. Naturally, 75% of them are fashion apparel and accessories companies, with 12% offering closely related sports and leisure apparel, 3% cosmetics and 3% jewellery.

In an indication of where the company and the wider online fashion industry are headed, 3% of the Top1000 selling on Zalando are consumer electronics brands. This is typically fashion-orientated gadgets such as headphones although it could presage a shift to sell higher end gadgetry in the future, particularly if a brand also has a fashion label.

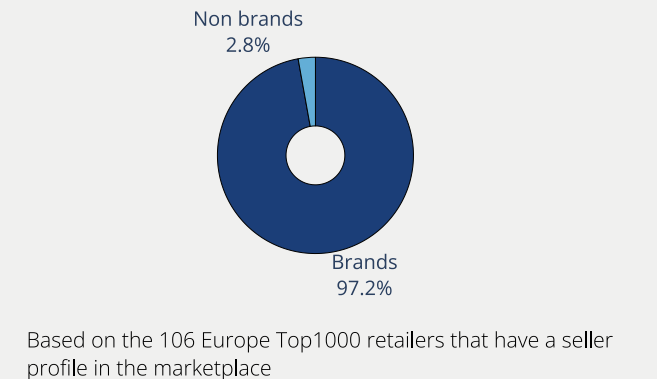
Relative size of Europe Top1000 retailers selling on Zalando



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Zalando-AC-5-v3

Share of Europe Top1000 retailers with their own brand selling on Zalando



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Zalando-AC-6-v1

Generating revenues in excess of €10.4bn in 2022, the market that Zalando finds itself in is highly competitive. Not only are there a growing number of marketplaces servicing the market with cut-price fast fashion – Shein, Temu and Asos to name but three – there is also a strong cohort of established fashion retailers selling online too. Many of these brands sell through Zalando and the other marketplaces, however, competition is fierce for a large pot of low-income Gen Z and Gen Y-ers.

Coupled with many general marketplaces such as Amazon, OTTO, eBay, OnBuy, Bol.com and Decathlon also selling in this space, Zalando has its work cut out to maintain growth and market share.

To tackle this, Zalando set up a membership programme – Zalando Plus – which grew by 150% in 2021 by giving a range of benefits to shoppers.

This programme also generates rich customer data and this deeper understanding is being used to tailor the goods Zalando sells, improving order economics and introducing the most cost-efficient solutions.

The company is also adding more fulfilment centres to its logistics network, with work already underway in Frankfurt in its home market of Germany, as well as in Poland and northern France. In summer 2022, it launched into Hungary and Romania.



## Zalando

**Features in:** Europe Top1000, Germany Top100, Global Elite Top1000, Spain Top100, UK Top500

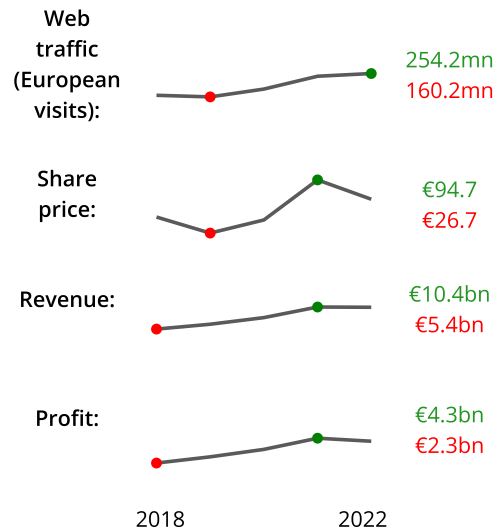
**Retail websites:** zalando.de, zalando.pl, zalando.it, zalando.fr, zalando.com

**Most significant retail markets:** Germany, Poland, France, Italy, Netherlands

**Retail HQ:** Germany

**Corporation:** Zalando SE, DE: ZAL

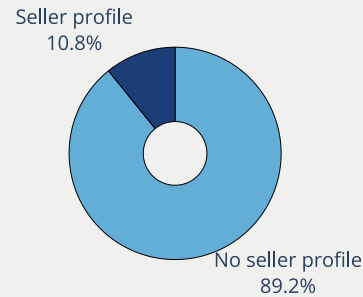
**Twitter:** @zalando



Researched 02-09-2015 to 23-06-2023  
Sources: RetailX, SimilarWeb (web traffic), Yahoo Finance (financial records). Green and red dots represent the highest and lowest recorded data point respectively

© RetailX 2023

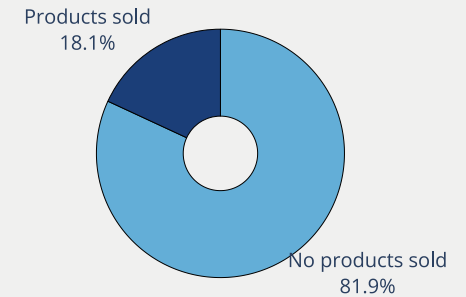
Share of Europe Top1000 retailers with a seller profile on Zalando



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Zalando-AC-1-v1

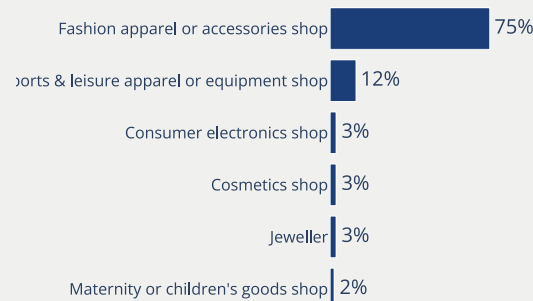
Share of Europe Top1000 retailers with their products sold on Zalando



Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Zalando-AC-2-v1

Europe Top1000 retailers selling on Zalando by sector, 2023

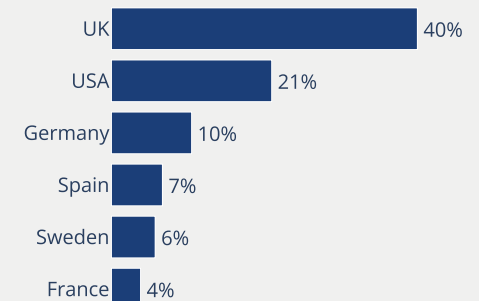


Based on the 106 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Zalando-AC-3-v2

Europe Top1000 retailers selling on Zalando by headquarters location, 2023



Based on the 106 Europe Top1000 retailers that have a seller profile in the marketplace

Source: RetailX

© RetailX 2023  
RXMMPEU23RP-Zalando-AC-4-v1

## Expert insight

## Why employ a marketplace?

Luke Hilton, Vice President of Solution Engineering, Marketplacer



The rapid adoption by retailers of a range extension strategy using either a marketplace or drop ship model represents the largest fundamental shift in European consumer spending since the emergence of ecommerce in the 1990s. Consider that 35% of online purchases made globally

now take place on a marketplace. To put that in context, only 17% takes place in a supermarket and just 12% in a retailer branded site.

Alongside responding fast to consumer trends, retailers can use marketplaces to explore new categories in a low-risk manner. This enables them to undertake a curated range extension strategy to entice consumers to shop more regularly and attract a new customer base, while keeping their brand 'front of mind' with shoppers, for whom the marketplace represents a trusted online shopping destination.

Representing an opportunity to combine the strength of their traditional retail business with the scale and value proposition of a marketplace, retailers can leverage marketplaces to take their ecommerce business in new directions and grow

beyond the limitations of their current operations and infrastructure. Creating curated marketplaces and experiences, featuring complimentary partner brands and sellers, makes it possible to increase customer engagement and lifetime value and loyalty.

### "It takes too long and costs too much"

This is a common sentiment retailers share when considering adopting a third-party marketplace. However, it doesn't have to be that way. In fact, for established retailers, extending an existing commerce platform with marketplace software like Marketplacer is the most streamlined and fastest way to stand up a marketplace destination. Some additional important points to consider, include:

- The marketplace must have the scalability needed to assure uptime and performance during periods of peak demand, as well as the ability to power geographic expansion. Today's SaaS marketplace platforms provide the enterprise-grade functionality and all-important extensibility retailers will need as their marketplace strategies evolve.
- Make it easy to dynamically add products, suppliers and new features, but the marketplace platform should also be able to capture data insights, keep a handle on transactions and commissions, manage how connected businesses sell and fulfil orders – including drop ship sellers – and rollout new revenue models or capabilities to their seller network.
- API-first modular platforms like Marketplacer seamlessly integrate into other technologies and tackle challenges like handling different tax regimes across multiple geographies or mitigating fraud.

By harnessing the power of digital connectivity, retailers across Europe can build successful and scalable online marketplaces that boost customer engagement and position their brand at the forefront of the discovery phase of the shopping experience.

With the right marketplace strategy and technology in play retailers can initiate a future-proofed and scalable marketplace destination that can be easily customised and evolved. Unlocking new revenue streams and greater customer stickiness while growing the audience of shoppers that visit their website.

## MARKETPLACER™

Marketplacer is a global technology SaaS platform equipped with all the tools and functionality needed to build successful and scalable online marketplaces, at speed. To date, Marketplacer has helped build and deploy over 100 Marketplaces connecting over 13,000 businesses worldwide. The Marketplacer platform exists to make growth simple, from implementing marketplace strategies such as shipment from drop-ship sellers, adding new categories or third-party range extension, through to consolidating markets and rolling out modern revenue models such as recurring memberships that allow businesses to grow faster and beyond the constraints of capital inventory.

Visit [marketplacer.com](https://marketplacer.com) for more information.



# MARKETPLACER<sup>™</sup>

## The fast track to scalable growth.

Drive profitable growth by expanding your product range and capturing incremental revenue using your existing websites and audiences to power strategic expansion.

Incorporating a third-party marketplace not only offers customers convenience through category and range extension but can also limit abandoned baskets, reduce customer churn and provide valuable insights into consumer behaviour.

The Marketplacer platform is designed to augment and enhance your commerce architecture while putting valuable tools into the hands of operators, sellers and shoppers.

Contact us



# The road ahead

**Marketplaces evolved rapidly across the pandemic and this momentum has been maintained as they now embrace technology and new ways to sell**

The marketplace market has never been one to stand still. Founded in the earliest days of ecommerce, the sector has evolved and grown over the years by adopting and adapting new ways to market and sell, along with new technologies and even new business models.

Going forward, the rise of retailer-run marketplaces only increases the pressure on the sector's players and, to keep pace, they are all having to be agile in how they operate. In the coming months and years, this is going to see a continued shift in how they operate, the technologies they use and even the markets they serve. So what's in store?

## NICHE AND VERTICAL MARKETPLACES

The biggest trend in marketplaces for 2024 and beyond is going to centre around specialisation. While the ecommerce market as a whole may be dominated by giant generalist marketplaces such as Amazon, eBay, Allegro, AliExpress and, in time, Temu, these 'horizontal' marketplaces rely on their sheer size to dominate all retail verticals.

They will continue to do so, since these players are so large that there is little prospect of any new players in this space entering the market. Yet change is happening. The growing shift towards

retailer-run marketplaces is already ushering in a new era of much more focused, sector-specific specialist marketplaces, often attracting shoppers on the strength of the retailer's own established and well-respected brand name.

These vertical marketplaces give shoppers all the benefits of marketplaces – choice, convenience, cost-competitiveness and delivery – but they are also getting a much more curated and specialist set of products more tailored to their particular needs.

Take, for example, Carrefour. It still sells all the standard grocery products that consumers want but they can now also try new things and buy unusual, artisanal foods to enhance their shopping. Similarly, health and beauty retailers such as Boots or Superdrug can vastly increase the range of niche cosmetics they can sell by adding a marketplace, giving existing customers a wider choice and attracting new customers who are looking for such specific specialist brands.

The shift to vertically integrated marketplaces can add to ecommerce the age-old selling trope of spontaneous product discovery. In the old days of physical retail, many shoppers discovered new things simply by chancing upon them in a store. The same can happen with vertical marketplaces because with a greater range of allied products available, there is more scope for shoppers to chance upon new things.

## AI-POWERED RECOMMENDATIONS

The need to differentiate through better product recommendations in a crowded market – and even using tech to appear to allow shoppers to 'discover'



©Shutterstock

new things spontaneously – is about to step up thanks to artificial intelligence (AI). Recommendation engines on marketplaces and retailer websites are nothing new, but their level of sophistication is growing as ever-more powerful AI is brought to bear. This garners much deeper insights into consumer behaviour, allowing for much richer and more nuanced recommendations.

And it's not just for existing customers. The holy grail is to be able to recommend things – at least in the right ballpark – to anonymous customers. Today's – and even more so, tomorrow's – AI is starting to be able to do this by having the power to better 'understand' what these new customers look at, where they linger and how they behave on the site. This can then help deliver much more intelligent suggestions and guide shoppers not just to products but also to discounts and offers and even to sign up.

This is vital to marketplaces of all types. The sector is becoming increasingly competitive and, whether a flat, generalised marketplace or a vertical specialist, understanding what customers want is vital.



This trend will be seen in 2024 across all ecommerce, not least as retailers attempt to make their non-marketplace sites perform better than their marketplace competitors. Because of this, marketplace offerings that don't look to AI-powered, deeply intelligent recommendations will struggle.

### **CHATBOTS, AI AND VOICE COMMERCE**

AI will not just be confined to recommendations – it has a role to play across the whole ecommerce process, from marketplaces to traditional D2C sites. One of the key areas where it will come to the fore is in chatbots and other tools that allow communication between a marketplace, the retailer and customers.

Of course, chatbots are already used across ecommerce, handling FAQs via instant messaging and routing queries to customer service agents based on 'intelligently' assessing what the consumer is asking. This is very much chatbot 1.0 though and as AI has exponentially increased in power – and ubiquity – over the past 24 months, so too have the power of AI run chatbots.

Moving on from 'simple' rules-based responses to key words and phrases to find answers or redirect a query, today's AI allows for self-learning that leads to a degree of understanding. The use of generative AI technologies such as GPT4 can also help create bespoke and highly conversational answers. Combining this 'self-learning' and generative approach with rules-based systems can, in theory, create a much more realistic – although still totally artificial – interaction between brand and customer.

While this can help handle far more consumer interactions than a team of humans ever could, its true potential lies in how to elevate all these interactions beyond being just reactive to customer comments into towards creating genuine two-way 'conversations' akin to how an old-style shop assistant may have helped guide customers to buy. This has the potential – along with AI-powered recommendations – to create a new paradigm in online selling, cross-selling and upselling.

For today's marketplaces, this combination is likely to be a much-needed differentiator in the competitive years ahead. It also once again shifts the nature of ecommerce from something that a customer does, towards something that happens to, or, even better, with the consumer.

News in late 2023 that Facebook owner Meta is poised to release chatbots with a personality on Facebook Messenger will only fuel this growth in conversational interaction.

The application of AI to voice also lends itself to voice commerce. Already well documented when smart speakers such as Amazon's Echo and Apple's HomePod first hit the headlines, the use of voice to interact with websites and sellers has, to some degree, failed to ignite widespread interest. Yet with natural language processing (NLP) and generative AI surging ahead, the ability to interact verbally with marketplaces is likely to return to the agenda only this time, it won't just be through smart speakers. To gain mass appeal, it will be through the websites and apps of the marketplaces themselves.

It seems inevitable that the internet will slowly edge towards being some sort of metaverse – a more immersive semi-naturalistic platform where interaction is less about typing and clicking, and more about pointing and speaking. When it does, natural voice interaction and chatbots are likely to become one of the main ways we all use the web, including how we shop on marketplaces.

### **MESSAGING, PAYMENTS AND SUPER APPS**

This shift towards talking to marketplace apps is potentially a huger, broader shift in how everyone will interact with the internet. In the instance of marketplaces, it will allow consumers to talk to these vendors – actually, their AI-powered apps – to search, get recommendations, discuss products and then buy them in a much more naturalistic way.

Already many younger people are communicating by sending each other voice messages. Apple has added the ability to send video messages via its FaceTime messaging app. Facebook is, as said, creating chatbots with personality. The way we access the web is already changing.

Even for those who aren't shifting to this new way of communicating with the digital world, messaging services such as SMS, iMessage, WhatsApp and social media messaging are all increasingly playing a role in how consumers interact with the companies they do business with. The era of conversational commerce – be that through text or voice – is upon us and it's set to create some radical new ways in which we shop.

Social media sites, for instance, are shifting from carrying promotional posts about retailers to allowing consumers to buy from them, adding to this conversational commerce model.

Combining messaging and social engagement with shopping – and indeed payments – can create a powerful new ‘marketplace’ model. Bringing them all together in one place to create a ‘super app’ has the potential to build a new, rich way to interact with retailers which, in turn, can lead to greater sales.

Such super apps already exist in China. WeChat, for example, combines social media, messaging, payment and ecommerce in one app. Elon Musk’s rebrand of Twitter to X and the changes he has instigated at the platform are rumoured to be laying the groundwork to turn X into such a super app.

For marketplaces, this presents an opportunity. The platforms already have the customer base, the products and the payments tools. Add in messaging and engagement and they could relatively easily shift to being super apps. Conversely, social media platforms have the customer base, the messaging and the retailers on-board. As they add ecommerce, they too are also poised to do the same.

As the internet slowly edges towards being an immersive metaverse, these super apps would be perfectly positioned to usher in a whole new *modus operandi* for online sellers and customers – radically altering not only what constitutes a marketplace, but also what the internet actually looks like to its users.

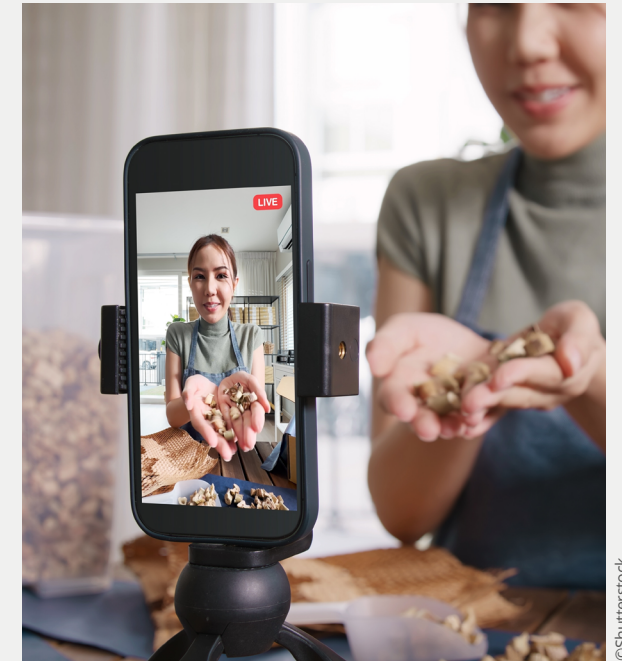
## Some other trends already shaping the sector

Marketplaces – like all ecommerce sites – are subject to ongoing incremental changes that are driven by how consumer shopping habits evolve and develop. Some of the more everyday trends set to shape the marketplace market include:

**Omnichannel** – as many physical-first retailers shift to adding online, so online-only marketplaces are looking to create a physical presence where consumers can see, try and buy as well as handle pick-ups and returns. But omnichannel goes way beyond the online/offline split, with all ‘channels’ playing a role: website and app for browsing and buying, social for news and influencer marketing, store for customer service.

**Live shopping** – presenters demonstrating products, live, on the marketplace (perhaps from the marketplace’s pop-up store?) adds an air of immediacy, a face to the marketplace and, above all, entertainment. It also allows brands and retailers to showcase their products in a way that stands out of a crowded marketplace.

**Augmented Reality (AR)** – using AR to allow products to be placed virtually can really help elevate sales. ‘Trying on’ clothes virtually cuts



©Shutterstock

returns and increases sales. ‘Placing’ furniture and even consumer electronics virtually can also help. Adding this to marketplaces not only enhances customer experience but also attracts merchants keen to benefit from the latest tech.

**Visual search** – Pointing your camera at something you’re interested in is likely to become ever more popular as users look to find what they want next. Expect it to become a marketplace staple in 2024.

# Figures

Distribution of online purchases, by channel	3	Europe Top1000 retailers selling on eMag by sector, 2023	18
Global online marketplace direct buyers, by generation	3	Europe Top1000 retailers selling on eMag by headquarters location, 2023	18
Category analysis of the Europe Largest 100	4	Relative size of the Europe Top1000 retailers selling on Etsy	19
Number of Largest 100 list members categorised by business type	5	Share of Europe Top1000 retailers with their own brand selling on Etsy	19
Share of European web traffic to the Largest 100 list categorised by business type	5	Share of Europe Top1000 retailers with a seller profile on Etsy	20
Number of marketplaces within the Largest 100 list, by country	6	Share of Europe Top1000 retailers with their products sold on Etsy	20
Share of total web traffic directed to marketplaces within the Largest 100 list, by country	7	Europe Top1000 retailers selling on Etsy by sector, 2023	20
Relative size of the Europe Top1000 retailers selling on Aliexpress	11	Europe Top1000 retailers selling on Etsy by headquarters location, 2023	20
Share of Europe Top1000 retailers with their own brand selling on Aliexpress	11	Relative size of the Europe Top1000 retailers selling on OnBuy	21
Share of Europe Top1000 retailers with a seller profile on Aliexpress	12	Share of Europe Top1000 retailers with their own brand selling on OnBuy	21
Share of Europe Top1000 retailers with their products sold on Aliexpress	12	Share of Europe Top1000 retailers with a seller profile on OnBuy	22
Europe Top1000 retailers selling on Aliexpress by sector, 2023	12	Share of Europe Top1000 retailers with their products sold on OnBuy	22
Europe Top1000 retailers selling on Aliexpress by headquarters location, 2023	12	Europe Top1000 retailers selling on OnBuy by sector, 2023	22
Relative size of the Europe Top1000 retailers selling on Allegro	13	Relative size of the Europe Top1000 retailers selling on OTTO	23
Share of Europe Top1000 retailers with their own brand selling on Allegro	13	Share of Europe Top1000 retailers with their own brand selling on OTTO	23
Share of Europe Top1000 retailers with a seller profile on Allegro	14	Share of Europe Top1000 retailers with a seller profile on OTTO	24
Share of Europe Top1000 retailers with their products sold on Allegro	14	Share of Europe Top1000 retailers with their products sold on OTTO	24
Europe Top1000 retailers selling on Allegro by sector, 2023	14	Europe Top1000 retailers selling on OTTO by sector, 2023	24
Europe Top1000 retailers selling on Allegro by headquarters location, 2023	14	Europe Top1000 retailers selling on OTTO by headquarters location, 2023	24
Relative size of the Europe Top1000 retailers selling on Ebay	15	Share of Europe Top1000 retailers with a seller profile on Refurbed	25
Share of Europe Top1000 retailers with their own brand selling on Ebay	15	Share of Europe Top1000 retailers with their products sold on Refurbed	25
Share of Europe Top1000 retailers with a seller profile on Ebay	16	Share of Europe Top1000 retailers with a seller profile on Temu	26
Share of Europe Top1000 retailers with their products sold on Ebay	16	Share of Europe Top1000 retailers with their products sold on Temu	26
Europe Top1000 retailers selling on Ebay by sector, 2023	16	Share of Europe Top1000 retailers with a seller profile on Wish	27
Europe Top1000 retailers selling on Ebay by headquarters location, 2023	16	Share of Europe Top1000 retailers with their products sold on Wish	27
Relative size of the Europe Top1000 retailers selling on eMag	17	Relative size of the Europe Top1000 retailers selling on Amazon	28
Share of Europe Top1000 retailers with their own brand selling on eMag	17	Share of Europe Top1000 retailers with their own brand selling on Amazon	28
Share of Europe Top1000 retailers with a seller profile on eMag	18	Share of Europe Top1000 retailers with a seller profile on Amazon	29
Share of Europe Top1000 retailers with their products sold on eMag	18	Share of Europe Top1000 retailers with their products sold on Amazon	29

Europe Top1000 retailers selling on Amazon by sector, 2023	29	Relative size of the Europe Top1000 retailers selling on Fnac	40
Europe Top1000 retailers selling on Amazon by headquarters location, 2023	29	Share of Europe Top1000 retailers with their own brand selling on Fnac	40
Relative size of the Europe Top1000 retailers selling on Bol.com	30	Share of Europe Top1000 retailers with a seller profile on Fnac	41
Share of Europe Top1000 retailers with their own brand selling on Bol.com	30	Share of Europe Top1000 retailers with their products sold on Fnac	41
Share of Europe Top1000 retailers with a seller profile on Bol.com	31	Europe Top1000 retailers selling on Fnac by sector, 2023	41
Share of Europe Top1000 retailers with their products sold on Bol.com	31	Europe Top1000 retailers selling on Fnac by headquarters location, 2023	41
Europe Top1000 retailers selling on Bol.com by sector, 2023	31	Relative size of the Europe Top1000 retailers selling on Lidl	42
Europe Top1000 retailers selling on Bol.com by headquarters location, 2023	31	Share of Europe Top1000 retailers with their own brand selling on Lidl	42
Relative size of the Europe Top1000 retailers selling on Boots	32	Share of Europe Top1000 retailers with a seller profile on Lidl	43
Share of Europe Top1000 retailers with their own brand selling on Boots	32	Share of Europe Top1000 retailers with their products sold on Lidl	43
Share of Europe Top1000 retailers with a seller profile on Boots	33	Europe Top1000 retailers selling on Lidl by sector, 2023	43
Share of Europe Top1000 retailers with their products sold on Boots	33	Europe Top1000 retailers selling on Lidl by headquarters location, 2023	43
Europe Top1000 retailers selling on Boots by sector, 2023	33	Relative size of the Europe Top1000 retailers selling on MediaMarkt	44
Europe Top1000 retailers selling on Boots by headquarters location, 2023	33	Share of Europe Top1000 retailers with their own brand selling on MediaMarkt	44
Share of Europe Top1000 retailers with a seller profile on B&Q	34	Share of Europe Top1000 retailers with a seller profile on MediaMarkt	45
Share of Europe Top1000 retailers with their products sold on B&Q	34	Share of Europe Top1000 retailers with their products sold on MediaMarkt	45
Share of Europe Top1000 retailers with a seller profile on Carrefour	35	Europe Top1000 retailers selling on MediaMarkt by sector, 2023	45
Share of Europe Top1000 retailers with their products sold on Carrefour	35	Europe Top1000 retailers selling on MediaMarkt by headquarters location, 2023	45
Relative size of the Europe Top1000 retailers selling on Cdiscount	36	Relative size of the Europe Top1000 retailers selling on Superdrug	46
Share of Europe Top1000 retailers with their own brand selling on Cdiscount	36	Share of Europe Top1000 retailers with their own brand selling on Superdrug	46
Share of Europe Top1000 retailers with a seller profile on Cdiscount	37	Share of Europe Top1000 retailers with a seller profile on Superdrug	47
Share of Europe Top1000 retailers with their products sold on Cdiscount	37	Share of Europe Top1000 retailers with their products sold on Superdrug	47
Europe Top1000 retailers selling on Cdiscount by sector, 2023	37	Europe Top1000 retailers selling on Superdrug by sector, 2023	47
Europe Top1000 retailers selling on Cdiscount by headquarters location, 2023	37	Europe Top1000 retailers selling on Superdrug by headquarters location, 2023	47
Relative size of the Europe Top1000 retailers selling on Decathlon	38	Relative size of the Europe Top1000 retailers selling on Zalando	48
Share of Europe Top1000 retailers with their own brand selling on Decathlon	38	Share of Europe Top1000 retailers with their own brand selling on Zalando	48
Share of Europe Top1000 retailers with a seller profile on Decathlon	39	Share of Europe Top1000 retailers with a seller profile on Zalando	49
Share of Europe Top1000 retailers with their products sold on Decathlon	39	Share of Europe Top1000 retailers with their products sold on Zalando	49
Europe Top1000 retailers selling on Decathlon by sector, 2023	39	Europe Top1000 retailers selling on Zalando by sector, 2023	49
Europe Top1000 retailers selling on Decathlon by headquarters location, 2023	39	Europe Top1000 retailers selling on Zalando by headquarters location, 2023	49

# End Matter

We hope you have found our research and analysis to be of interest and value. We would be very pleased to hear from you with questions, suggestions or comments. In particular, do let us know of any areas of research that you would like us to investigate for possible inclusion in the 2024 report.

Please get in touch via [research@retailx.net](mailto:research@retailx.net)

**RESEARCH:**

**Researcher** Anna Segarra Fas

For questions about our research and to send feedback, please email the team via:

[research@retailx.net](mailto:research@retailx.net)

**Research Director** Martin Shaw

**CEO** Ian Jindal

**EDITORIAL:**

**Editor** Paul Skeldon

**Production Editor** Cam Winstanley

**Managing Editor** Jonathan Wright

**DESIGN:**

**Art Editor** Lauren Coburn

**Cover Design** Freny Antony

**MARKETING:**

**Marketing and Circulation**

Addison Southam [marketing@retailx.net](mailto:marketing@retailx.net)



**SALES:**

**Commercial Director** Andy James

[andy@retailx.net](mailto:andy@retailx.net)

**Group Creative Solutions Director**

Marvin Roberts [marvin@retailx.net](mailto:marvin@retailx.net)

This report may not be stored in a retrieval system, distributed or sold in whole or in part without the publisher's express permission. Fair quotation is encouraged, with a link to the report's URL on RetailX.net. All charts and figures marked with  are provided under the Attribution-NonDerivatives 4.0 International (CC BY-ND 4.0) license (<https://creativecommons.org/licenses/by-nd/4.0/>). You are welcome to use these in full with a link to this report, retaining the copyright notice .

This report is based upon our reasonable efforts to compile and analyse the best sources available to us at any given time. Opinions reflect judgment at the time and are subject to change.

**RetailX at InternetRetailing Media Services Ltd**

27 Clements Lane

London, EC4N 7AE

Tel: +44 (0) 20 7062 2525

Printed in Great Britain

[www.retailx.net](http://www.retailx.net)



### THANK YOU

Our thanks to go our title sponsor for helping us to bring our insights and findings to professionals working within ecommerce and multichannel retail.

**MARKETPLACER™**

[www.marketplacer.com](http://www.marketplacer.com)

### Knowledge Partners

We would like to thank the following Knowledge Partners for their original data insights as well as support, advice and guidance in producing the RetailX European Luxury Report 2023.



[builtwith.com](http://builtwith.com)



[similarweb.com](http://similarweb.com)