

ONLINE RETAILING – GERMANY – 2021

The German online retail sector has reached record highs, fueled by the COVID-19 pandemic. Eco-friendly credentials increase in appeal while the growth in older consumers offers future opportunities.



Carolin Jaretzke,
Associate Director, Retail,
Automotive, Finance,
Insurance, Germany



Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Mintel's perspective
- Act on growing sustainability awareness

Impact of COVID-19 on online retailing

- COVID-19 accelerates the shift to online
- COVID-19's impact on online retailing and German consumer behaviour

Market context

- Online sales continue to grow strongly, escalated by COVID-19 despite a slowing economy
 - Graph 1: key economic data, in real terms, 2019-22

Mintel predicts

- Market size & forecast following COVID-19 outbreak
- The online market reaches record heights
 - Graph 2: online retail turnover, 2016-21
- Online retailing market reaches 11.5% of all retail sales and will continue to grow
 - Graph 3: online as % retail sales, 2016-26

What consumers want and why

- Consumers want: to buy clothes, footwear and accessories online
 - Graph 4: top five product categories for online shopping in the past 12 months, 2019-21
- Consumers want: to buy clothes, footwear and accessories online
- Consumers want: to use digital payment tech when shopping online
- Consumers want: to get a deal
 - Graph 5: services used when purchasing products online in the last 12 months, 2021

Opportunities

- Address the growing sustainability awareness
- Highlight ethical qualities to create a point of differentiation
- Leverage the power of social media to strengthen the online offer
- Use influencers for further online engagement

The competitive landscape

- German online retailing remains a concentrated market
 - Graph 6: leading online retailers' estimated shares of total online sales, 2020

- Amazon keeps its crown as the top online retailer
- Ebay could benefit from a rise in the second-hand market & economic downturn
- Quick download resources

MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy
 - Graph 7: key economic data, in real terms, 2019-22
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 - Graph 8: internet access methods, 2021
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- Shifting financial outlook makes it essential to attract younger consumers
 - Graph 9: maximum total population by age, % share, 2020-30
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 - Graph 10: food and drink launches with ethical/environmental claims, 2018-21
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MARKET ACTIVITY

Sector size and forecast

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- Online retailing reaches 11.5% of all retail sales and will continue to grow
 - Graph 11: online as % retail sales, 2016-26
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 - Graph 12: online sales per capita € (incl VAT), 2016-26

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WHAT CONSUMERS WANT AND WHY

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Participation and frequency of shopping online

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- Turning grey into gold
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- Turning grey into gold

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 - Graph 22: products bought online, by age, 2021
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 - Graph 24: retailers shopped with, by age, 2021
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 - Graph 25: online-only retailers shopped with in the last 12 months, 2021
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 - Graph 28: shopping online with social media and marketplace platforms, 2021

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 - Graph 29: [no title]
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 - Graph 31: behaviours related to online shopping in the last 12 months, 2021
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 - Graph 32: behaviours related to online shopping, 2021
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- Localism finds a new voice in online shopping

RETAILER ACTIVITY

Leading retailers

- Amazon remains the undisputed online market leader
- Ebay could benefit from a rise in the second-hand market & economic downturn
- Otto forms a new collaboration

- Leading retailers: revenues

Market share

- German online retailing remains a concentrated market
- Amazon, Otto combined account for half of the market
 - Graph 33: leading online retailers' estimated shares of total online sales, 2020
- Detailed market shares

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- New partnerships, new opportunities
- Leveraging the power of AI to enhance service
- Sustainability comes to the fore
- Lidl and Aldi set their eye on online grocery
- Competition heats up
- Online retailing landscape gets more crowded
- Localism: a growth driver
- Speedy delivery: a point of difference
- Gorillas embarks on a global expansion strategy
- Rapid delivery services could threaten the established order
- Online grocery giant Rewe experiments with QR tech in brick-and-mortar

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- Amazon focuses their TV ads on diversity in Germany
- German TV 'climate pledge fund' ad in November 2020

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language
- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – value – best- and worst-case

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China	+86 (21) 6386 6609
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