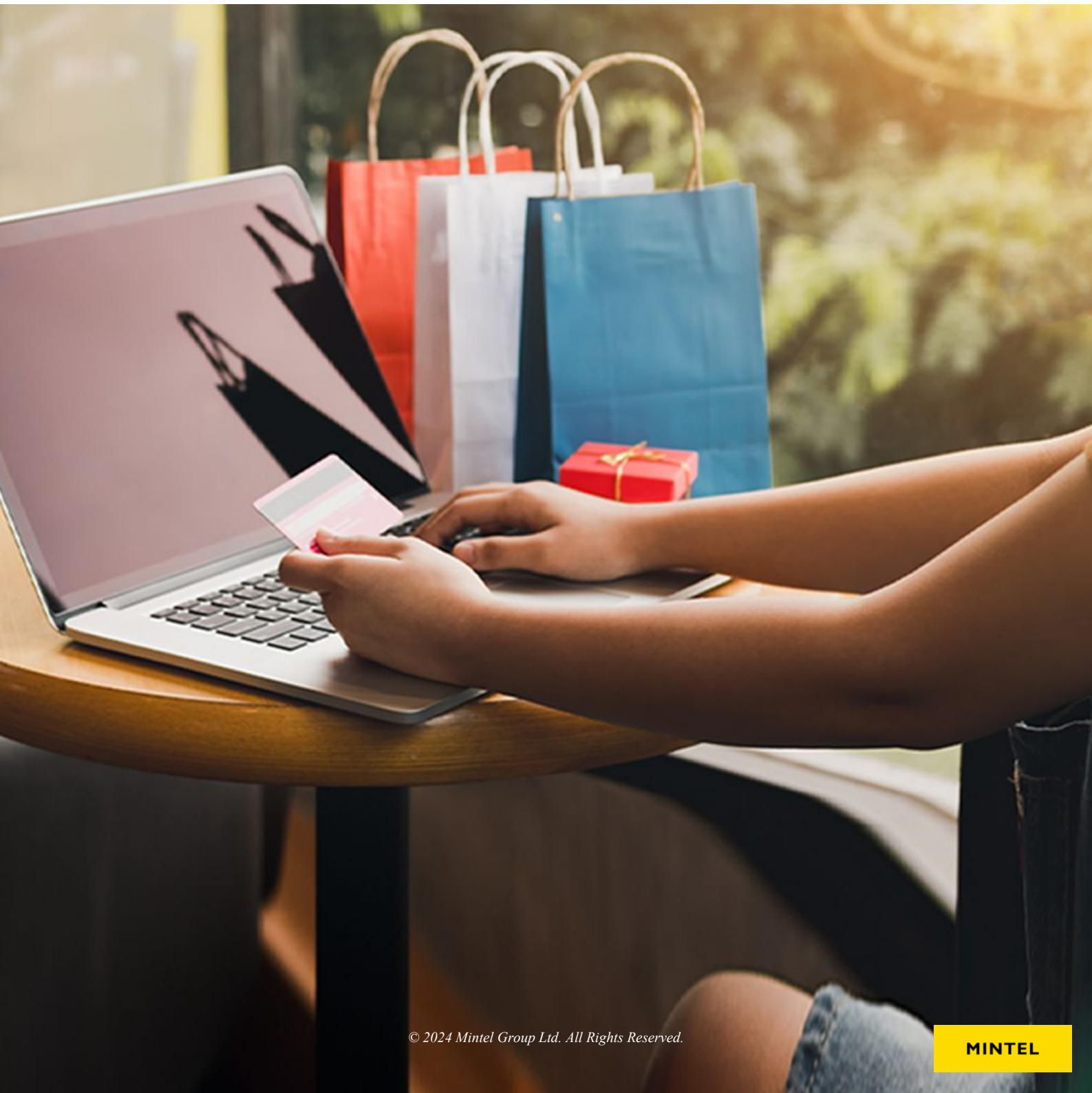


ONLINE RETAILING – GERMANY – 2021

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,
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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

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 - 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

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 - Graph 9: maximum total population by age, % share, 2020-30
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MARKET ACTIVITY

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WHAT CONSUMERS WANT AND WHY

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- Leading retailers: revenues

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APPENDIX

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

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

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