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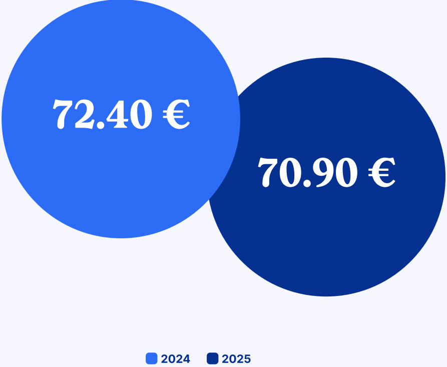
Monthly eCommerce Pulse in Europe

A report based on the online purchases of a panel of 5M+ e-shoppers in December 2025

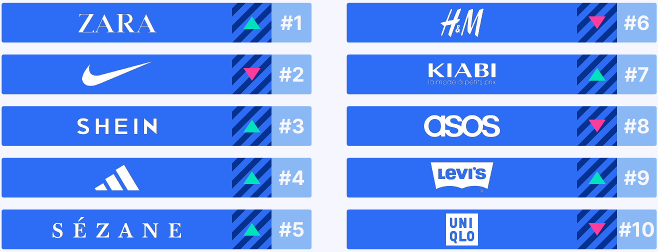
> **How is the market evolving? Which categories are driving online sales? Do heavy shoppers buy the same products as light shoppers?**
>
> **January 2025 report, based on the online purchases of December 2024.**
> **A monthly minutes to discover the latest market and consumer insights, thanks to online transactional emails collected passively, anonymised and processed in real time. To help you get game-changing actionable consumer insights, and make the right choice at the right time.**

🛍️ French Sales Kickoff: Key Online Insights

The Average Order Value (AOV) is lower than last year



The best-selling clothing brands in value



- ZARA ▲ #1
- ▼ #2
- SHEIN ▲ #3
- ▲ #4
- SÉZANE ▲ #5
- H&M ▼ #6
- KIABI la mode à petits prix ▲ #7
- asos ▼ #8
- Levi's ▲ #9
- UNI QLO ▼ #10

Foxintelligence by NielsenIQ e-shopper panel. Total ecommerce FR. 01/08/2025 to 01/12/2025 vs. 01/10/2024 to 01/14/2024

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Online sales have increased in both value and

volume compared to last year

Ecommerce growth in EU10

YTD December 2024 vs previous year

+11%
value

+19%
volume

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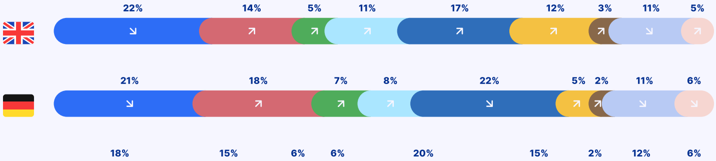
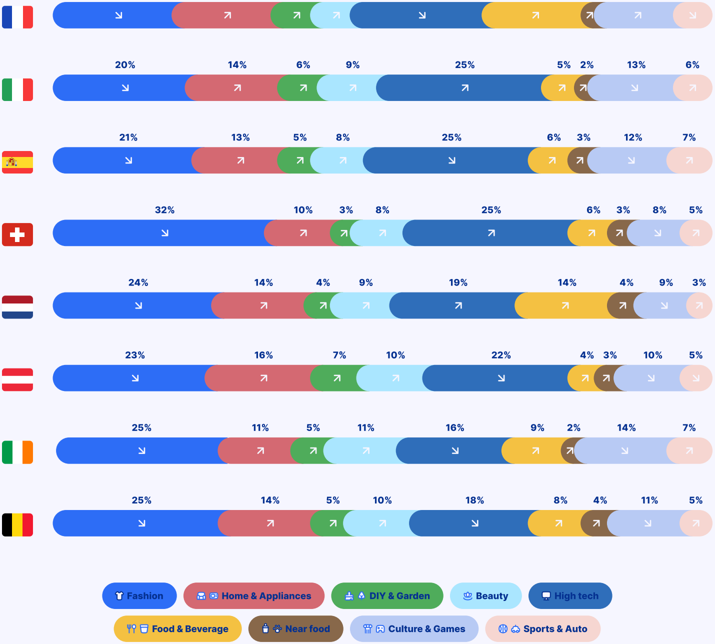
The fashion category is losing ground accross all countries, while Beauty, Food & Beverage, and Near Food categories are growing

Category mix in value

↗ → ↘ Market share evolution December 2024 vs December 2023





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French buyers remain the most inclined to favour second-hand purchases

Share of second-hand in value

in December 2024

10%

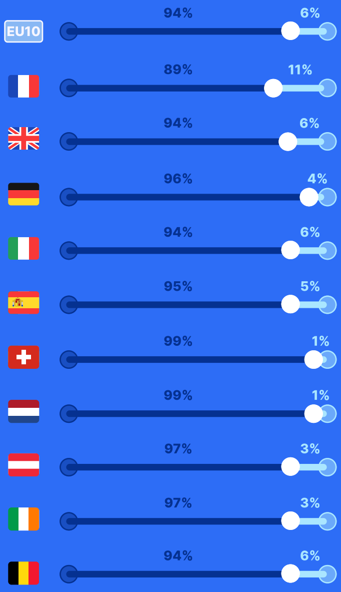
of purchases within the high-tech category are refurbished

8%

of second-hand purchases within the fashion category

New Refurbished in total eCommerce*

New vs. second-hand

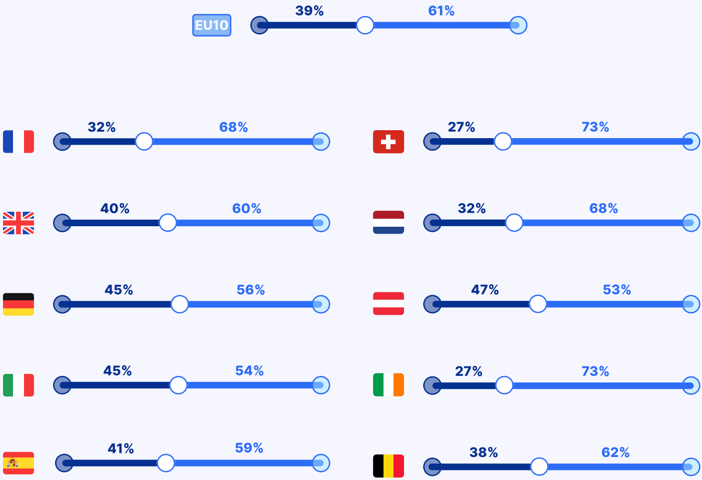


*excluding food

German, Italian and Austrian eshoppers are the most enthusiastic about marketplaces

Share of Marketplace in value

Marketplace (3P) **Retail (1P)** in total eCommerce in December



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The High-Tech and Fashion sectors are losing momentum, while the Home sector is gaining traction

Top categories by shopper profile

↗ → ↘ Market share + evolution December 2024 vs December 2023

Heavy shoppers

1	High Tech	21%
2	Fashion	20%
3	Home	16%

Top 20% of online shoppers who spend the most

Medium shoppers

1	High Tech	23%
2	Fashion	21%
3	Home	15%

Following 30%

Light shoppers

1	Fashion	26%
2	High Tech	21%
3	Home	12%

Remaining 50%

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Temu is capturing marketshares among heavy shoppers

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Top 10 retailers on heavy shoppers

↗ → ↘ Market share evolution vs. last month (LM) | last year (LY)

🇬🇧	🇫🇷	🇩🇪	🇮🇹	🇪🇸
Amazon ↗ LM | ↘ LY	**Amazon** ↗ LM | ↘ LY	**Amazon** ↗ LM | ↘ LY	**Amazon** ↗ LM | ↘ LY	**Amazon** ↗ LM | ↘ LY
eBay → LM | ↘ LY	**Leclerc** ↘ LM | ↘ LY	**Otto** ↘ LM | ↗ LY	**Zalando** ↘ LM | ↗ LY	**El Corte Ingles** ↗ LM | ↗ LY
Tiktok ↘ LM | ↗ LY	**Vinted** ↘ LM | ↗ LY	**eBay** ↗ LM | ↘ LY	**Vinted** ↗ LM | ↗ LY	**Media Markt** ↘ LM | ↗ LY

Argos ↗ LM ↘ LY	**Fnac** → LM ↗ LY	**Zalando** ↘ LM ↘ LY	**eBay** ↗ LM ↗ LY	**AliExpress** ↘ LM ↘ LY
Next ↗ LM ↘ LY	**Carrefour** ↘ LM ↘ LY	**Media Markt** ↘ LM ↗ LY	**Media World** ↘ LM ↗ LY	**PcComponentes** ↘ LM ↗ LY
Asda ↘ LM ↘ LY	**Boulanger** ↘ LM ↗ LY	**Ikea** ↗ LM ↗ LY	**Unieuro** ↘ LM ↘ LY	**Mercadona** → LM ↗ LY
Asos ↘ LM ↘ LY	**Ikea** → LM ↗ LY	**Temu** ↘ LM ↘ LY	**Ikea** ↘ LM ↘ LY	**Zalando** ↗ LM ↘ LY
Very ↘ LM ↘ LY	**Intermarché** ↗ LM ↗ LY	**H&M** ↘ LM ↘ LY	**Aliexpress** ↘ LM ↗ LY	**Ikea** ↗ LM ↗ LY
Currys → LM ↗ LY	**Apple** ↘ LM ↗ LY	**About You** ↘ LM ↘ LY	**Esselunga** ↗ LM ↘ LY	**Zara** ↘ LM ↘ LY
Tesco ↘ LM ↘ LY	**Zalando** ↘ LM ↘ LY	**Asos** ↘ LM ↘ LY	**Temu** ↘ LM ↗ LY	**Shein** ↘ LM ↗ LY

🇨🇭	🇳🇱	🇦🇹	🇮🇪	🇧🇪
Zalando ↘ LM ↘ LY	**Bol** ↗ LM ↘ LY	**Amazon** ↗ LM ↘ LY	**Amazon** ↗ LM ↘ LY	**Amazon** ↗ LM ↗ LY
Galaxus ↗ LM ↗ LY	**Coolblue** ↗ LM ↗ LY	**Zalando** ↘ LM ↘ LY	**Smyths Toys** ↗ LM ↗ LY	**Bol** ↗ LM ↘ LY
Digitec ↗ LM ↘ LY	**Ah** ↗ LM ↗ LY	**Media Markt** ↘ LM ↗ LY	**Tesco** ↗ LM ↗ LY	**Zalando** ↘ LM ↘ LY
Temu ↘ LM ↗ LY	**Picnic** ↗ LM ↘ LY	**Best Secret** ↘ LM ↗ LY	**Next** ↗ LM ↗ LY	**Colruyt** ↗ LM ↘ LY
Amazon ↗ LM ↗ LY	**Zalando** ↘ LM ↘ LY	**Temu** ↘ LM ↘ LY	**Dunnes** ↘ LM ↗ LY	**Coolblue** ↗ LM ↗ LY
Brack ↗ LM ↘ LY	**Amazon** ↘ LM ↗ LY	**Ikea** ↗ LM ↗ LY	**Temu** ↘ LM ↗ LY	**Vinted** ↘ LM → LY
Interdiscount ↗ LM ↗ LY	**Media Markt** ↘ LM ↗ LY	**H&M** ↘ LM ↗ LY	**Shein** ↘ LM ↗ LY	**Temu** ↘ LM ↗ LY

Retailer	LM	LY
Migros	↘	↘
Wehkamp	↗	↘
Universal	↗	↗
Harvey Norman	↗	↗
Privé by Zalando	↗	↘
Coop	↗	↘
Jumbo	↗	↘
About You	↘	↘
Apple	→	↗
Media Markt	↘	↗
Privé by Zalando	↘	↘
Temu	↘	↘
eBay	↗	→
Harvey Norman	↗	↗
Ikea	↘	→

Heavy shoppers
Top **20%** of online shoppers
who spend the most

Medium shoppers
Following **30%**

Light shoppers
Remaining **50%**

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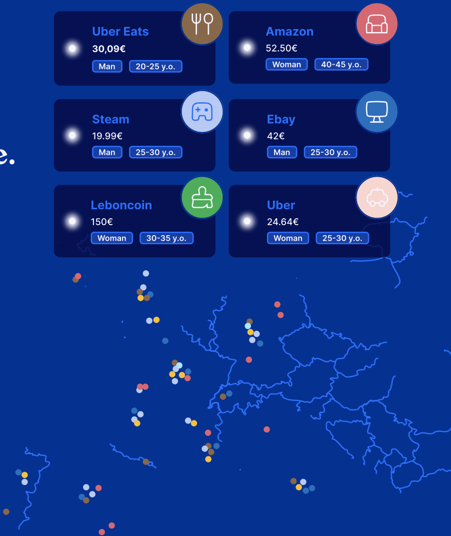
What the Fox?

Ecommerce Intelligence. Reinvented.

We help digital brands grow with technology backed market research, based on a community of millions of real consumers sharing their online transactions.

All of this data available in real time in a SaaS platform

- Rely on the full view of Ecommerce
- Leverage the best online consumer panel
- Grow your market share with actionable consumer insights



10K+ decisions makers get a head start with Foxintelligence

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LEROY MERLIN
DARTY
L'ORÉAL
deliveroo
KFC
LACOSTE

BackMarket
KINGFISHER
SEPHORA
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leboncoin
Rakuten

Superdrug
MAISONS DU MONDE
Electrolux
SHOWROOM PRIVÉ
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Domino's

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AliExpress
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