



CONNECTING GLOBALLY
INSPIRING ACTIVATION

E-COMMERCE LITE

2025 Lite report



Executive Summary

- Over the past 3 years **E-Commerce share** has been stable, but crept up to **10.1% in 2024** (across the 42 countries where trended data is available)
- **Penetration is the key driver of growth** (+2.6pts to 48.2%), with LATAM (+5.8pts) and South-East Asia (+5.7pts) showing the highest regional gains. Free delivery of Personal Care items has been a major factor in attracting new buyers
- Penetration in Western Europe recovered to 35.0% in 2024 but remains 1.1pts behind the level of 2022.
- E-Commerce **share over 25% in North & West Asia**, driven by China and Korea. Western Europe only 7.2% share and growth is slowing, but remains well ahead of South-East Asia (3.8%) and Eastern Europe (2.4%)
- Western Europe leads the way in basket size due to the dominant position of major supermarkets.
- Private Label share is lower across all regions, but E-Commerce has a higher percentage of sales on promotion



43 Markets

LATAM

AR	Argentina
BO	Bolivia
BR	Brazil
CAM	Central America
CL	Chile
CO	Colombia
EC	Ecuador
MX	Mexico
PE	Peru

WESTERN EUROPE

BE	Belgium
DK	Denmark
FR	France
DE	Germany
GB	Great Britain
IE	Ireland
IT	Italy
NL	Netherlands
ES	Spain
SE	Sweden

EASTERN EUROPE

AT	Austria
BG	Bulgaria
HR	Croatia
CZ	Czech Republic
GR	Greece
HU	Hungary
PL	Poland
RO	Romania
RS	Serbia
SK	Slovakia
UA	Ukraine

MEA

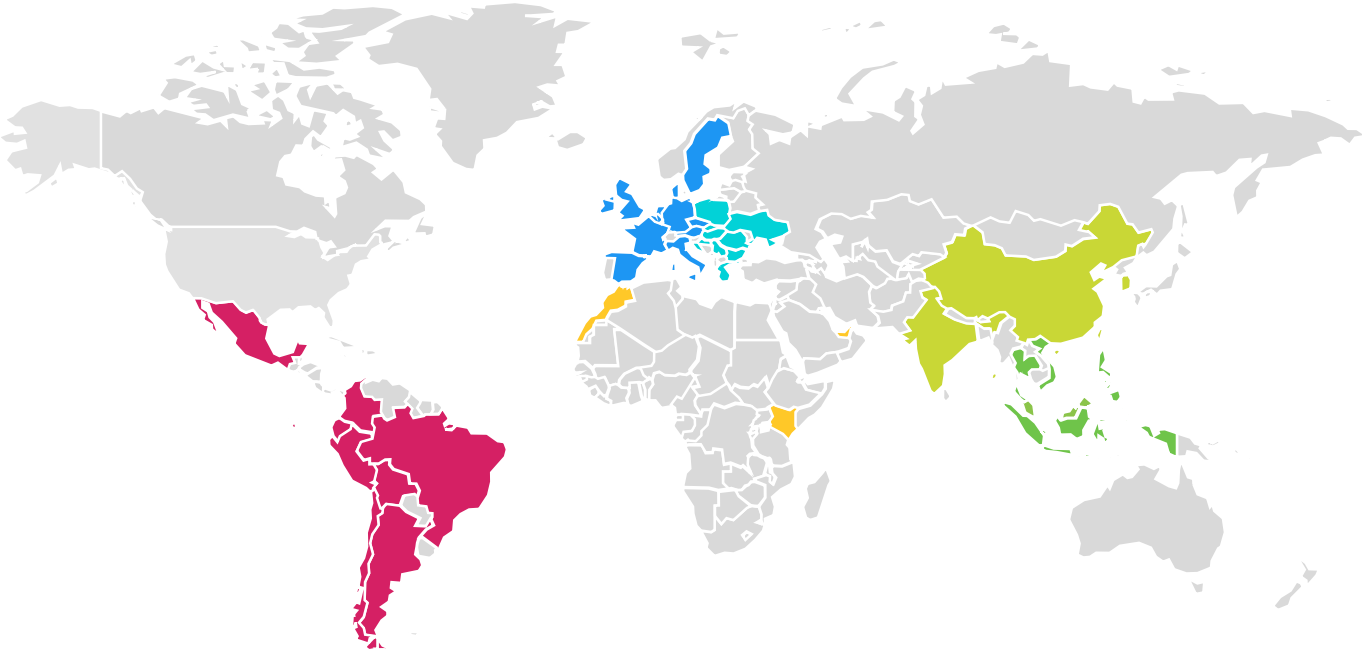
KE	Kenya
MA	Morocco
UAE	United Arab Emirates

NORTH & WEST ASIA

CN	China
IN	India
KR	Korea
TW	Taiwan

SOUTH-EAST ASIA

ID	Indonesia
MY	Malaysia
PH	Philippines
TH	Thailand
VN-R	Vietnam Rural
VN-U	Vietnam Urban



AT, BE, BG, HR, CZ, DK, DE, HU, IT, NL, PL, RO, RS, SK, SE, UA provided by YouGov
LATAM, MEA, N&W Asia, S-E Asia and FR, GB, GR, IE, ES provided by Kantar

Lite Report - Agenda

Section 1: Global

- Total Value, Penetration, Frequency, Euro per Trip MAT 3 Years

Section 2: Regional View

- Total & Regional E-Commerce vs Offline % Value Change MAT Dec 2024 vs YA
- Total & Regional E-Commerce Value Share and Share of Occasions MAT Dec 2024 vs YA
- Total & Regional E-Commerce Value Share and Penetration MAT Dec 2024 & MAT 3 Years
- Total & Regional E-Commerce Value Share and Penetration MAT 3 Years
- Total & Regional E-Commerce Frequency and Spend per Trip MAT Dec 2024 & MAT 3 Years
- Total & Regional E-Commerce Frequency and Spend per Trip MAT 3 Years
- Private Label Total & Regional E-Commerce Share MAT 3 Years
- Private Label Total & Regional E-Commerce vs Offline Index MAT Dec 2024
- Promotions Total & Regional E-Commerce Share MAT 3 Years
- Promotions Total & Regional E-Commerce vs Offline Index MAT Dec 2024



GLOBAL

Global penetration



45.5%
▲ 2.6pts vs YA

Highest online penetration

93%



South Korea

Lowest online penetration

2.3%



Morocco

Countries with online penetration growth in latest year

26/42

Fastest growing penetration

50%
▲ 19.4pts



Ecuador

Private Label share online



31.2%
▼ -0.8pts vs 2023

Online shopping trips per day



> 25M
▲ +15% vs 2023

Europe online Private Label value share

35%



Total exc. Europe online Private Label value share

3%



Global online promo share



37.2% 2022
36.7% 2023
36.0% 2024

Frequency has been the main growth driver, but spend per trip has fallen in the last 2 years

E-Commerce KPI's, 3 MAT's to December 2024

Year	Value	% Change
2022	119.8 bn	
2023	128.6 bn	7.4%
2024	136.1 bn	5.8%

Year	Penetration	Change
2022	42.4%	
2023	42.8%	+0.5 pts
2024	45.5%	+2.6 pts

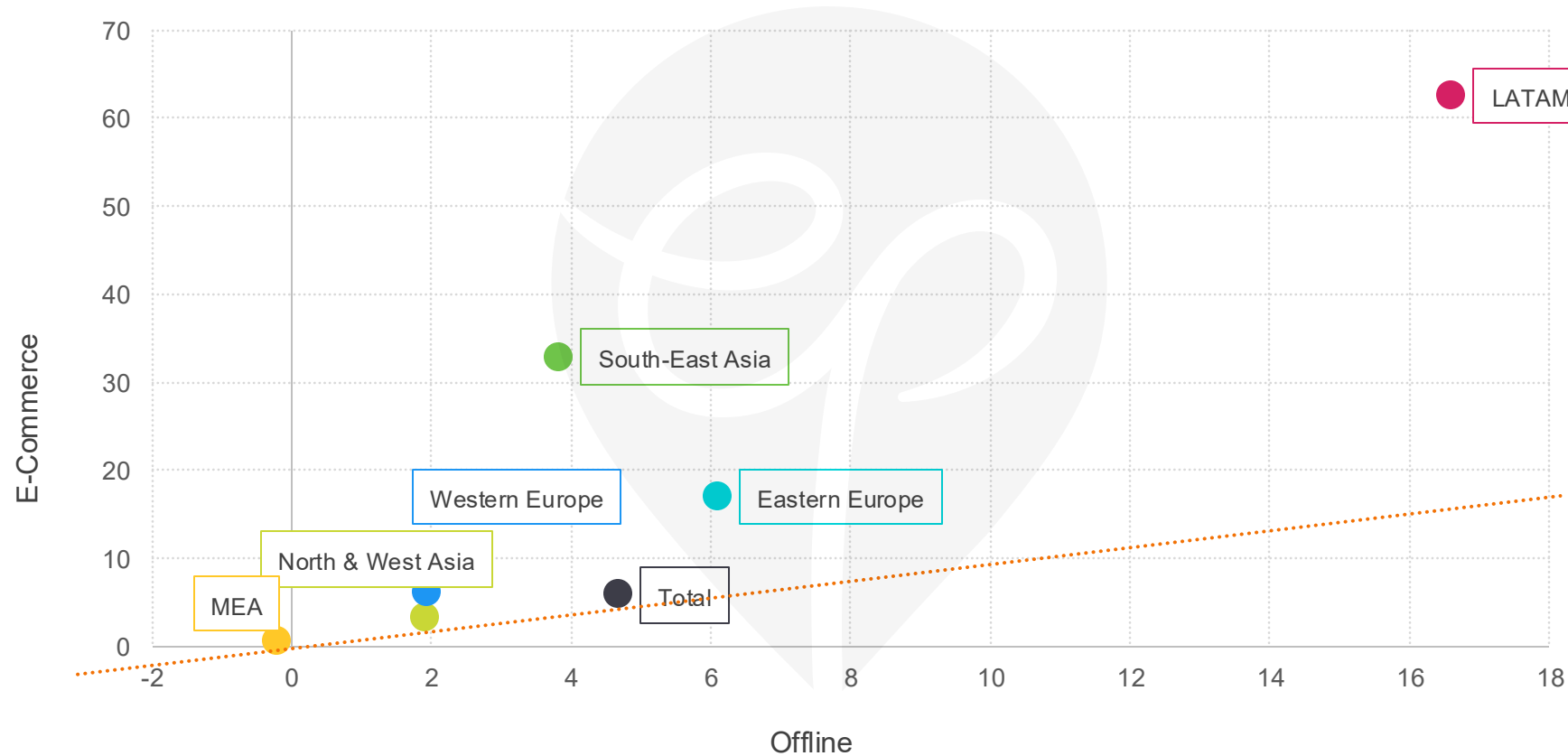
Year	Frequency	% Change
2022	19.7	
2023	21.7	10.2%
2024	23.2	7.2%

Year	€ / trip	% Change
2022	16.93	
2023	16.04	-5.3%
2024	14.74	-8.1%

REGIONAL VIEW

LATAM showing strongest growth, but partly driven by hyperinflation in Argentina E-Commerce share growing fastest in South-East Asia

E-Commerce vs. Offline % Value Change Latest MAT vs. YA



Source: Euromonitor, Kantar, YouGov – MAT Dec 2024, FMCG excl Fresh

	YoY Change in Value Share
Total	+0.1
LATAM	+0.4
WE	+0.3
EE	+0.2
MEA	+0.0
N&W Asia	+0.3
S-E Asia	+0.8

Value share below 10% in all regions bar N&W Asia which is over ¼

E-Commerce Regional Value Share and Share of Occasions

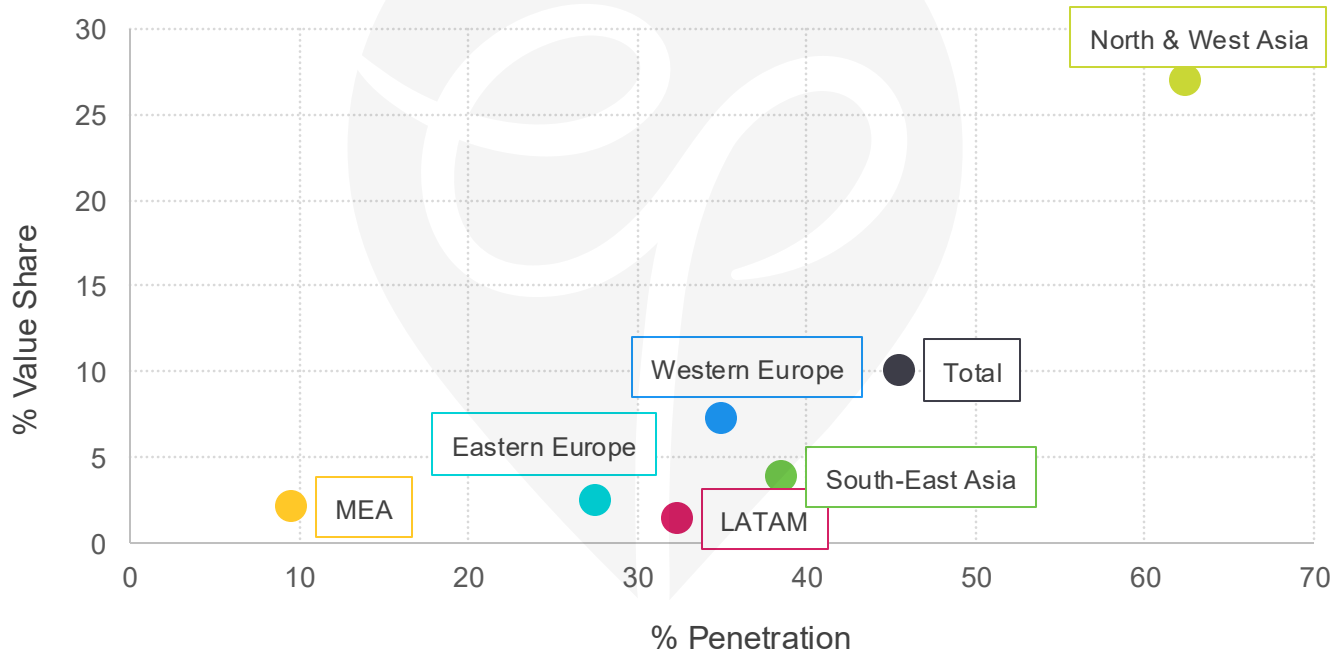
Region	E-Commerce value share	% value change year on year	E-Commerce % trip share	% trips change year on year
Total	10.1	5.8	6.0	15.1
LATAM	1.4	62.5*	0.8	26.2
Western Europe	7.2	6.0	2.6	6.3
Eastern Europe	2.4	17.0	1.1	13.3
MEA	2.1	0.6	0.3	11.3
North & West Asia	26.9	3.2	18.2	14.5
South-East Asia	3.8	32.9	1.2	41.9

Source: Euromonitor, Kantar, YouGov – MAT Dec 2024, FMCG excl Fresh; * Hyperinflation in Argentina contributes significantly to this. Excluding Argentina gives LATAM E-Commerce growth of 41.2%

E-Commerce Penetration

E-Commerce Penetration increased in 2024 largely due to gains in Asia and LATAM. Value share recovered after falling in 2023, but WE remains lower than in 2022. S-EA showing the strongest improvement followed by LATAM

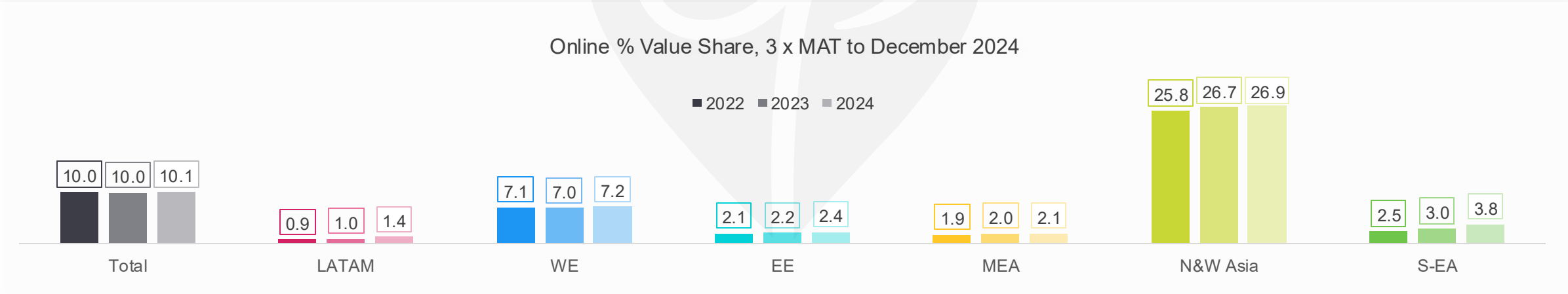
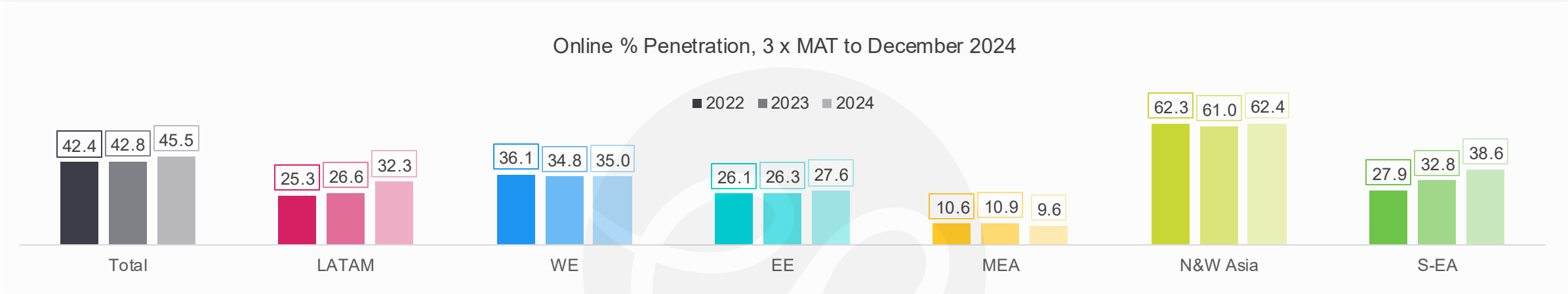
E-Commerce % Value Share and Penetration, 3 MAT's to December 2024



Source: Euromonitor, Kantar, YouGov – MAT Dec 2024, FMCG excl Fresh

	Penetration			Value Share		
	2022	2023	2024	2022	2023	2024
Total	42.4%	42.8%	45.5%	10.0%	10.0%	10.1%
LATAM	25.3%	26.6%	32.3%	0.9%	1.0%	1.4%
WE	36.1%	34.8%	35.0%	7.1%	7.0%	7.2%
EE	26.1%	26.3%	27.6%	2.1%	2.2%	2.4%
MEA	10.6%	10.9%	9.6%	1.9%	2.0%	2.1%
N&W A	62.3%	61.0%	62.4%	25.8%	26.7%	26.9%
S-EA	27.9%	32.8%	38.6%	2.5%	3.0%	3.8%

North & West Asia dominant, S-EA and LATAM developing quickly in penetration, but remain well behind WE in share terms where major multiples are key

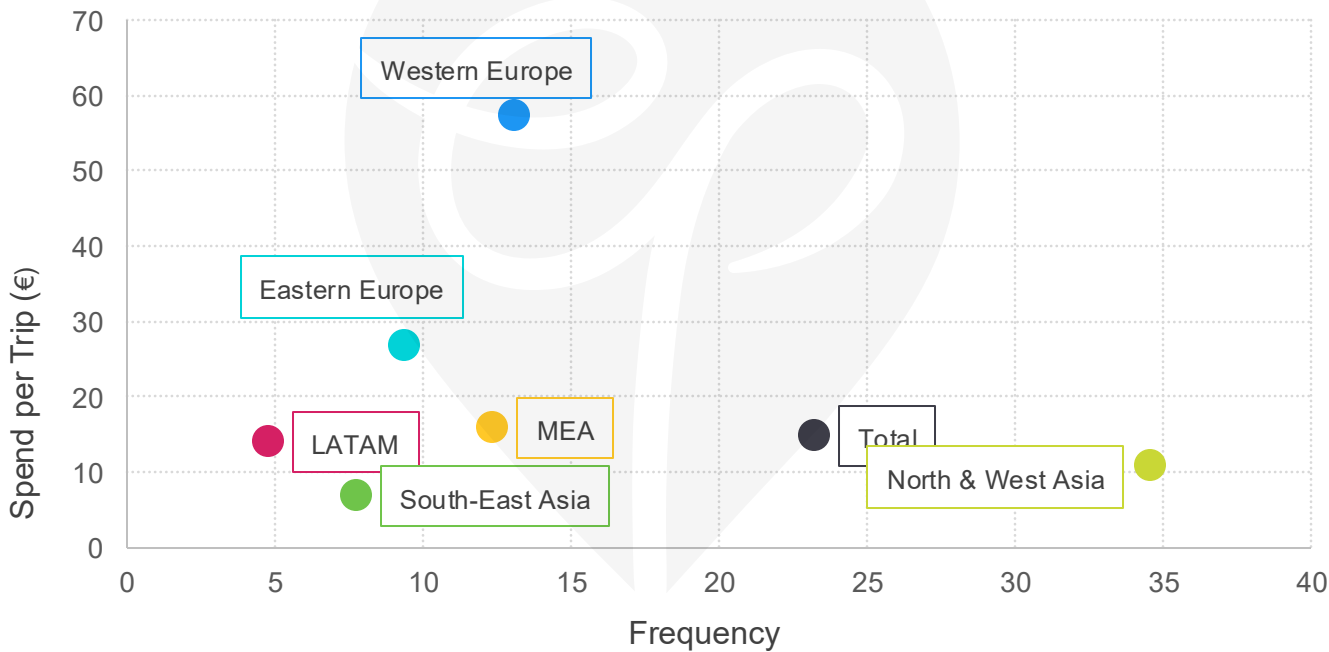


Source: Euromonitor, Kantar, YouGov – MAT Dec 2024, FMCG excl Fresh

E-Commerce Frequency and Spend per Trip (€)

E-Commerce Frequency increased slightly in 2024 due to small gains across all regions with the greatest in N&W Asia. Spend per Trip down Asian and MEA regions compared to 2023. WE and EE remain flat, with LATAM showing a bit of increase.

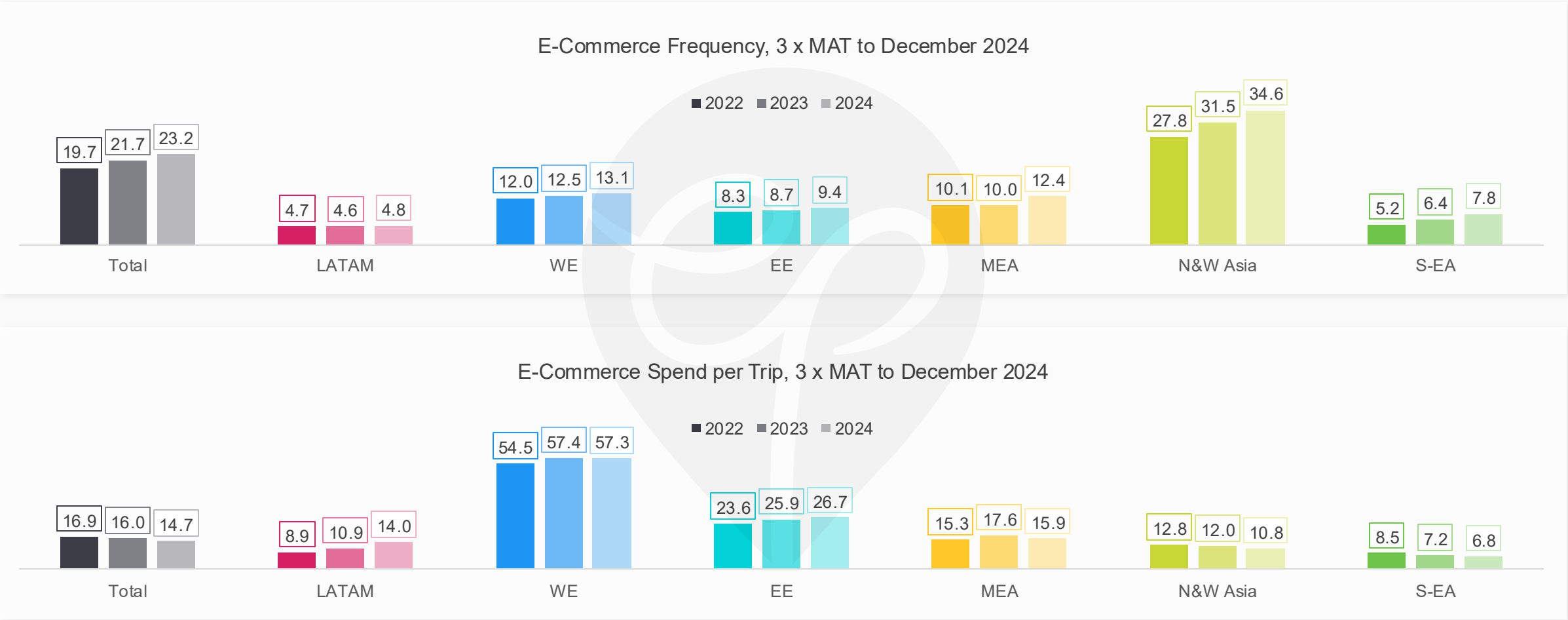
E-Commerce Frequency and Spend per Trip (€),
3 MAT's to December 2024



Source: Europanel, Kantar, YouGov – MAT Dec 2024, FMCG excl Fresh

	Frequency			Spend per Trip (€)		
	2022	2023	2024	2022	2023	2024
Total	19.7	21.7	23.2	16.93	16.04	14.74
LATAM	4.7	4.6	4.8	8.89	10.89	14.03
WE	12.0	12.5	13.1	54.54	57.43	57.27
EE	8.3	8.7	9.4	23.56	25.90	26.74
MEA	10.1	10.0	12.4	15.30	17.62	15.92
N&W A	27.8	31.5	34.6	12.78	11.96	10.74
S-EA	5.2	6.4	7.8	8.50	7.23	6.77

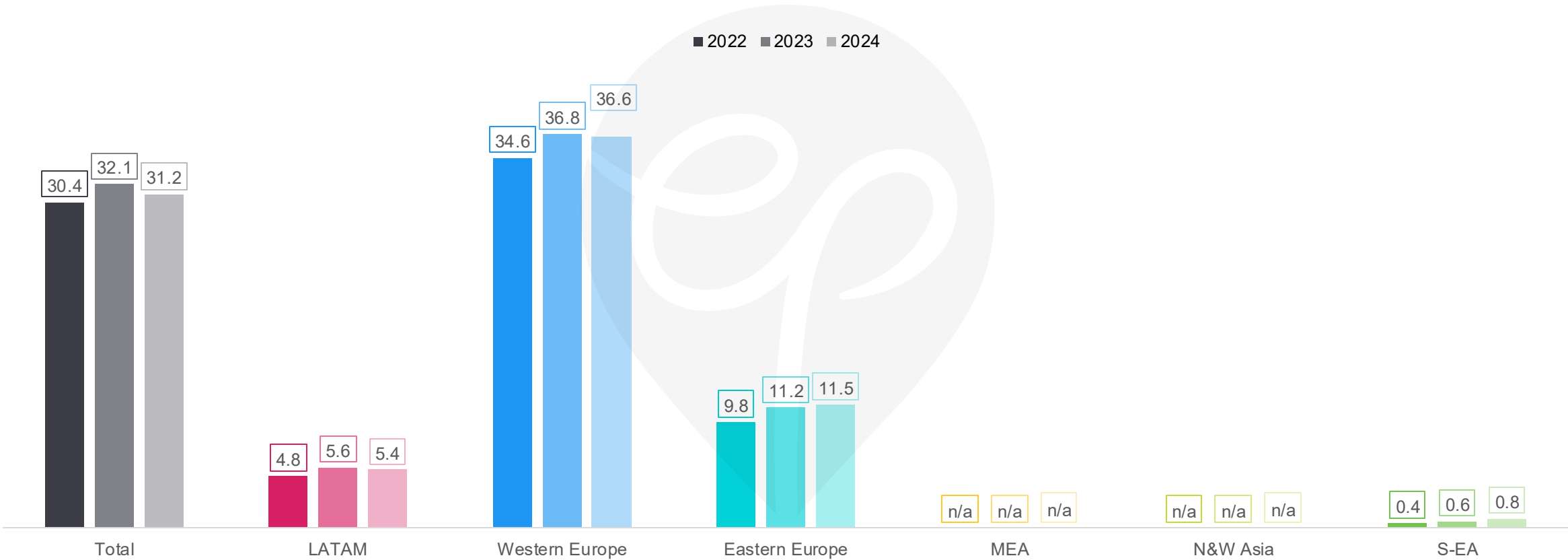
Global frequency driven by N&W Asia while Europe leads the way in spend per trip



Source: Euromonitor, Kantar, YouGov – MAT Dec 2024, FMCG excl Fresh

Strong growth in 2023, but slight fall in 2024 due to Western Europe and stronger E-Commerce value growth outside WE

E-Commerce PL Share – latest 3 MAT's – NB Limited PL data available in Asia and MEA



PL share over one third in WE, 3x the level in EE and the highest index against PL offline share

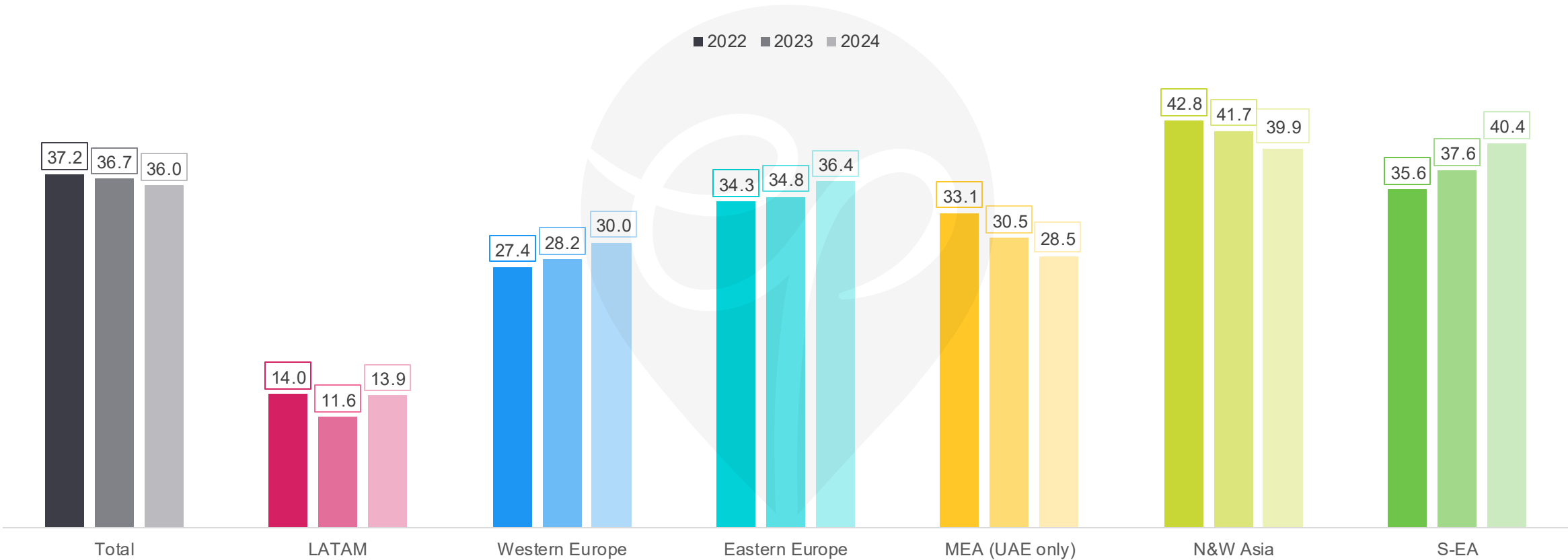
E-Commerce Private Label value shares latest MAT; Global and Regional; Total PL online index based on average of regional indices



* MEA and N&W ASIA data not available

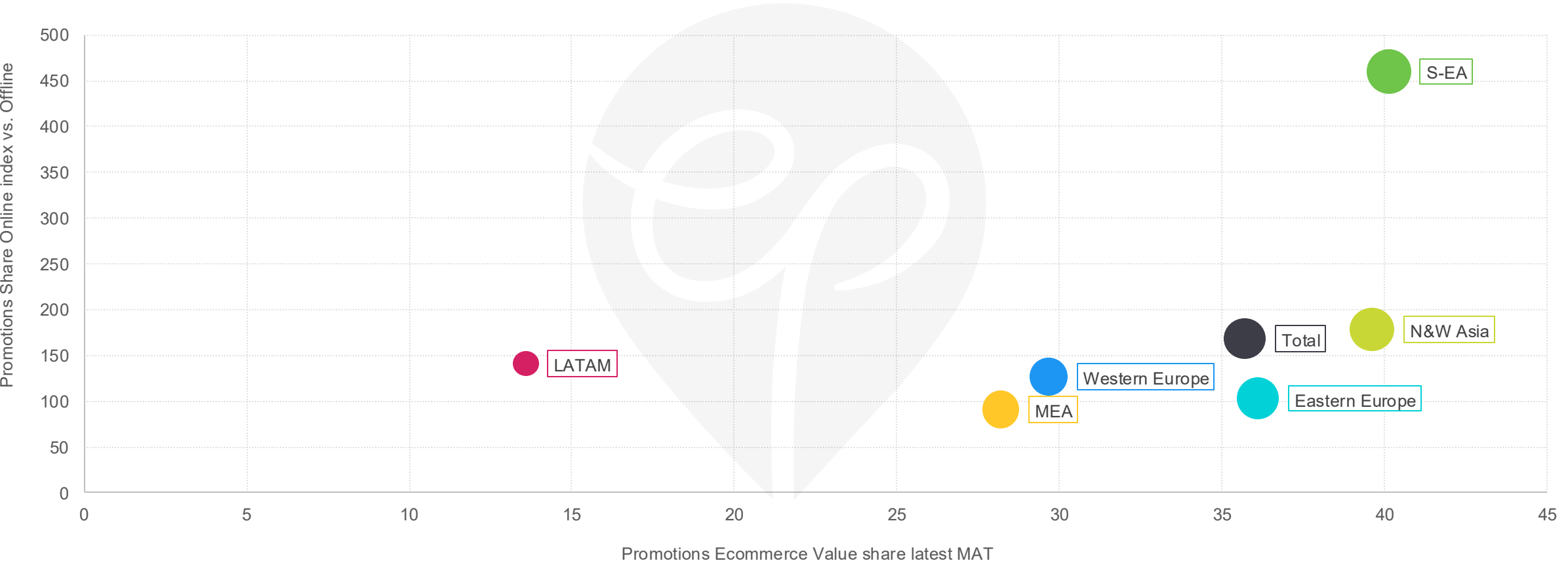
Fall in total share entirely due to N&W Asia (China); increasing steadily elsewhere

E-Commerce Promotions Share – latest 3 MAT's – NB Limited Promotions data available in MEA



Promotion Share in E-Commerce over 4x higher in S-E Asia than offline. Absolute level much lower still in LATAM

E-Commerce Promotions share & index vs. Offline, latest MAT; Global and Regional



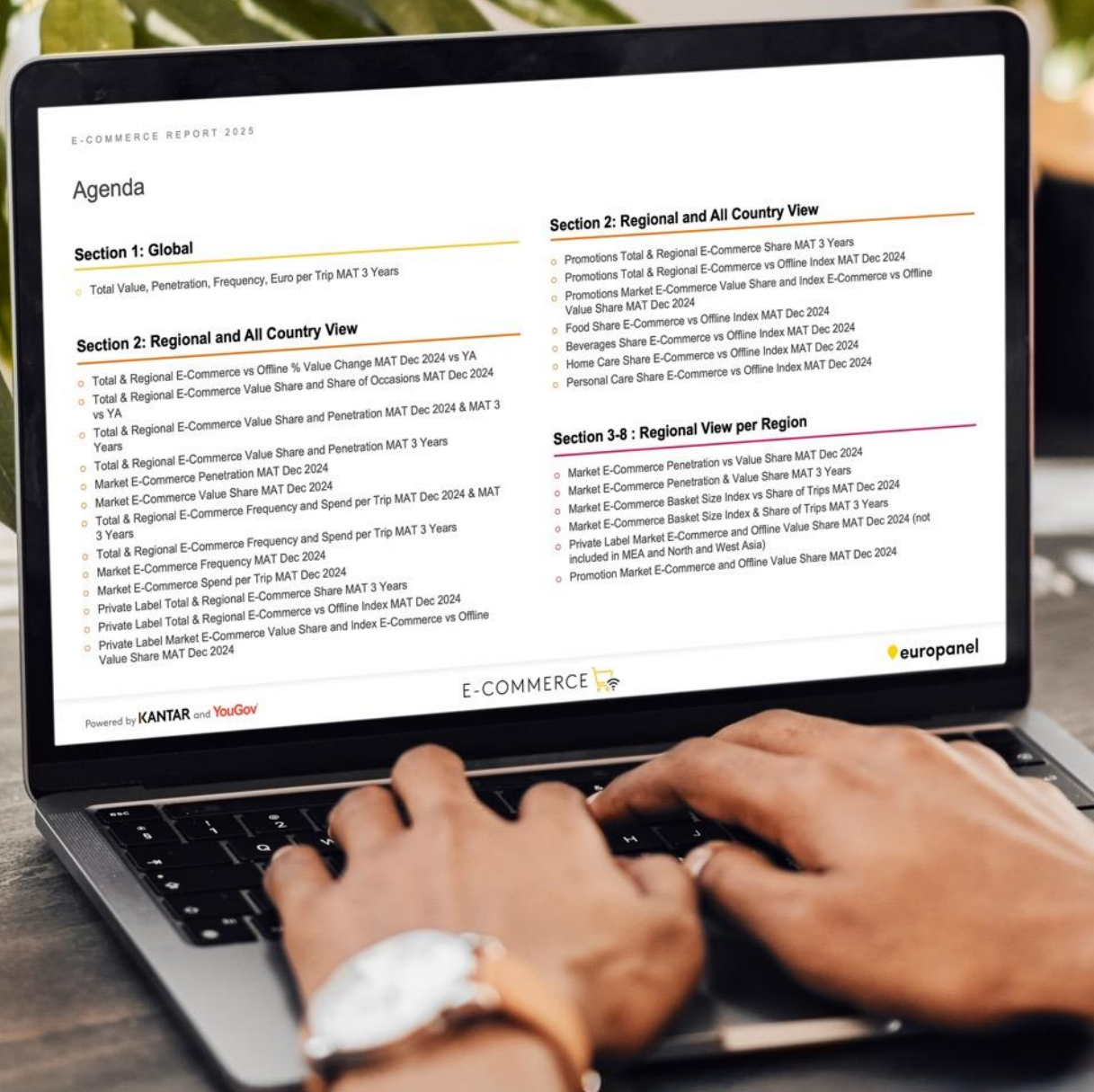
* MEA is UAE only

Interested in learning more?

The **FULL REPORT** includes:
Individual market data for 43 markets,
Supercategory analysis and regional sections.

Reach out to your client
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- Market E-Commerce Spend per Trip MAT Dec 2024
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- Private Label Market E-Commerce Value Share and Index E-Commerce vs Offline Value Share MAT Dec 2024

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- Promotions Total & Regional E-Commerce Share MAT 3 Years
- Promotions Total & Regional E-Commerce vs Offline Index MAT Dec 2024
- Promotions Market E-Commerce Value Share and Index E-Commerce vs Offline Value Share MAT Dec 2024
- Food Share E-Commerce vs Offline Index MAT Dec 2024
- Beverages Share E-Commerce vs Offline Index MAT Dec 2024
- Home Care Share E-Commerce vs Offline Index MAT Dec 2024
- Personal Care Share E-Commerce vs Offline Index MAT Dec 2024

Section 3-8 : Regional View per Region

- Market E-Commerce Penetration vs Value Share MAT Dec 2024
- Market E-Commerce Penetration & Value Share MAT 3 Years
- Market E-Commerce Basket Size Index vs Share of Trips MAT Dec 2024
- Market E-Commerce Basket Size Index & Share of Trips MAT 3 Years
- Private Label Market E-Commerce and Offline Value Share MAT Dec 2024 (not included in MEA and North and West Asia)
- Promotion Market E-Commerce and Offline Value Share MAT Dec 2024

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E-COMMERCE 

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