



# France eCommerce Market Report - 2021

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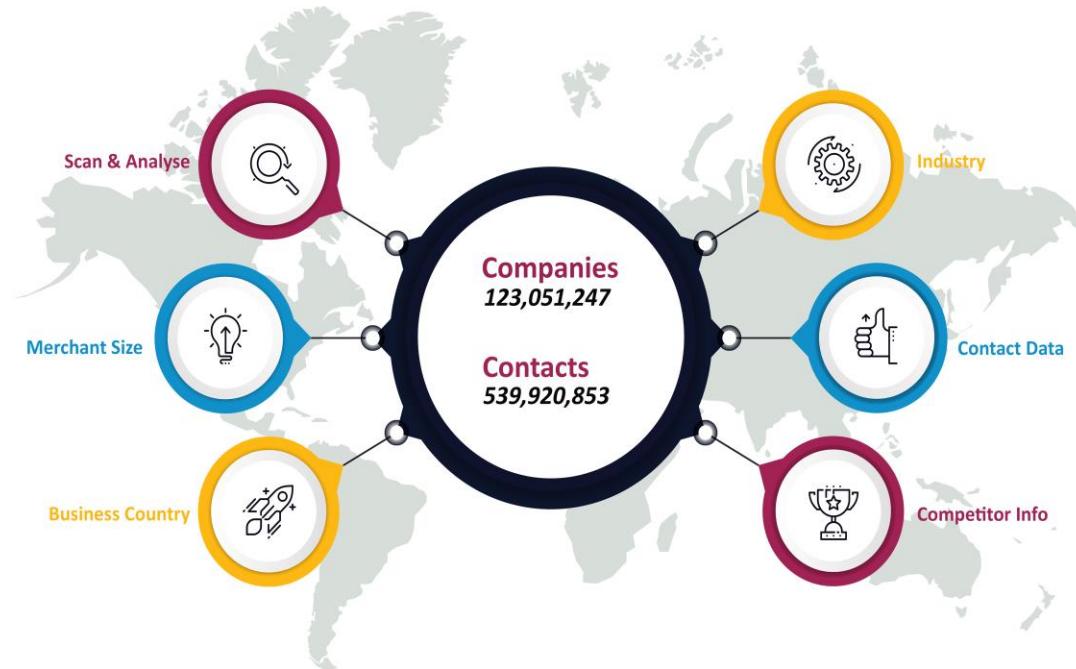
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# About TAMI

TAMI patent technology helps companies to size their market opportunity and generate sales leads for their sales and marketing teams. TAMI stands for Total Addressable Market Intel. With over 123M companies and 540M verified contacts we can help your company to significantly increase your sales targets and win more market share. We are delighted to be helping 50 of the top Fortune 500 companies to win more clients and increase their revenue. Our technology is a B2B search engine, essentially a Google for business, for which a patent has been granted in Europe. The graphic below shows how TAMI scans the internet





# CEO Insight



## In 2021, online sales grew by 15.1%

- The e-commerce sector (Products and Services) exceeded 129 billion euros in 2021, up 15.1%, compared to 8.5% in 2020. The sector is thus returning to double-digit growth.
- Sales of products on the internet continued to progress with +7% vs 2020. For its part, the Transport, Tourism, Leisure sector started up again with +44% vs 2020. But it still remains behind compared to 2019: -16%.
- The sector thus totals 129.1 billion euros in 2021, including 66.7 billion euros for product sales.
- Over the past 12 months, online sales sites (products and services combined) have recorded more than 2.1 billion transactions, an increase of 16%. The average amount of a transaction fell compared to 2020 (-0.8%) but remains above its 2019 level (+1.8%) During the year 2021, the average basket was 60 euros (61 euros in 2020).
- Over the past year as a whole, e-commerce is estimated at 14.1% of retail trade (sales of products), i.e. 0.7 points more than in 2020.
- The number of active merchant sites increased by 11% over one year; a pace equivalent to that of 2020.
- The number of active websites is 1.5M
- 212K of these websites are eCommerce enabled
- 91K eCommerce websites are shipping product

# 2021 France Internet Sales

## FRENCH ECOMMERCE MARKET REPORT AT A GLANCE (2021)

The French eCommerce Market is worth **129B euro**



**91K** eCommerce websites are shipping product

There are **7.7M** registered domains in France

**1.5M** of these domains are active websites

**212K** are eCommerce enabled

**125K** websites are shipping product



**59M** (90%) of French people use the internet

The population of France is **67.8M**

Amazon sales have increased by **7%** to **€8.3B** YOY

2021 eCommerce growth rate of **15%** from 2020

Online product sales have grown by **7%** from 2020

eCommerce now represents **14%** of retail trade

**2.1 billion** internet transactions completed in 2021

The number of French internet users grew by **2.5%** or an increase of **1.4M** people from 2020

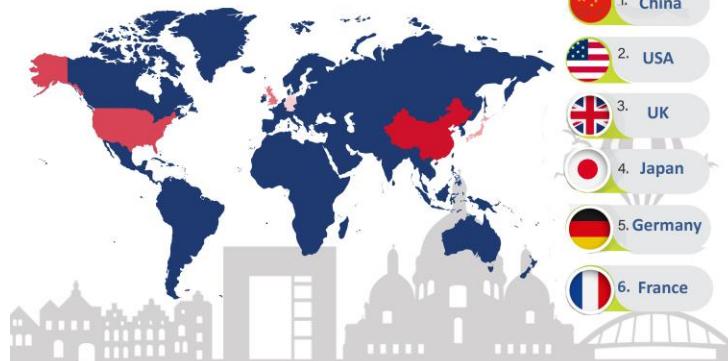
France ranks **6th** in the Global eCommerce Market

ARPU eCommerce sales of **€1,215**

Mobile Sales grew by **23%** from 2020

### Global Comparison

(based on eCommerce market worth)



### Based on an analysis of 91K eCommerce sites shipping product

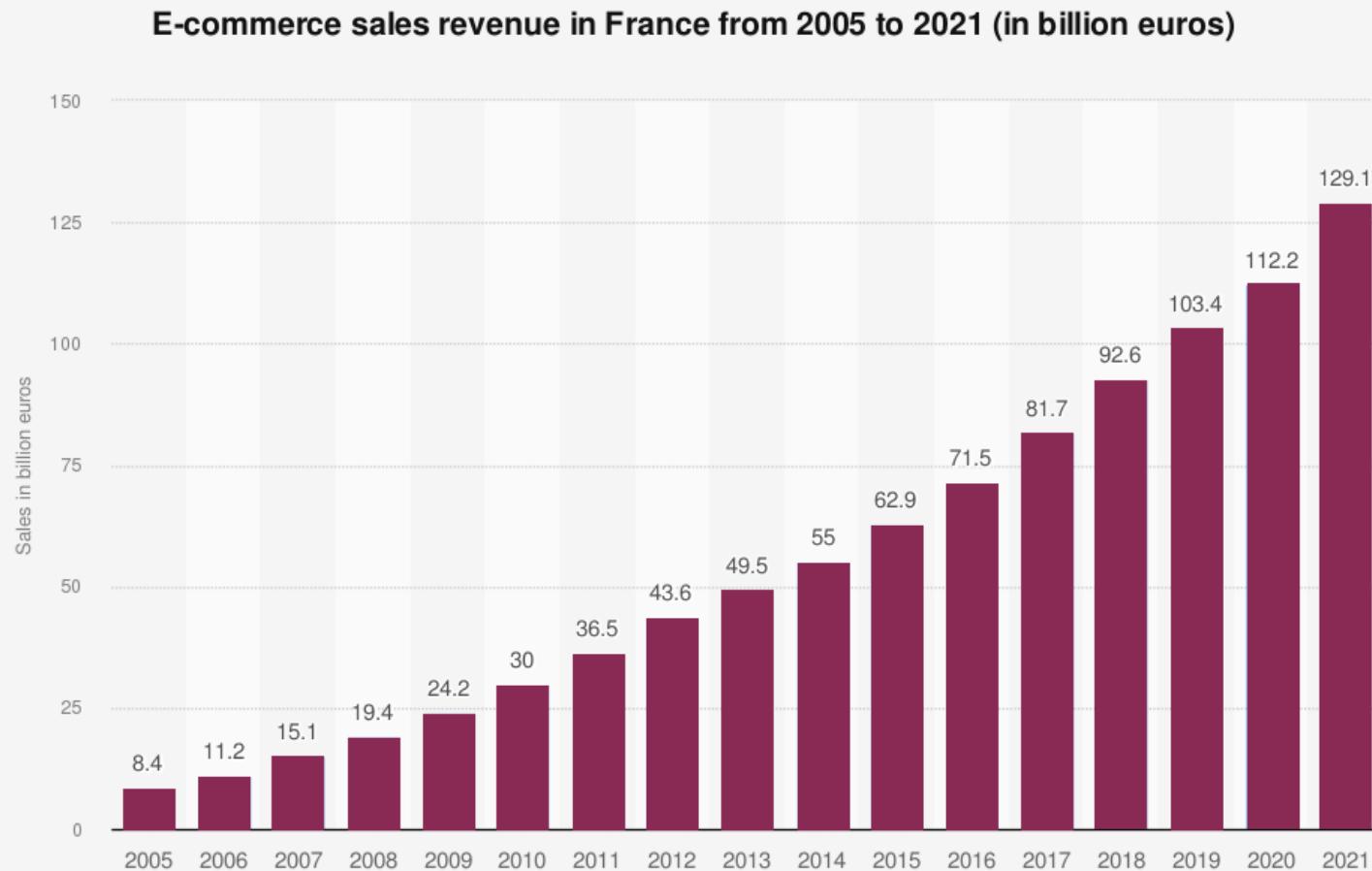


# 2021 Q4 Top Ranking eCommerce Sites

| Merchant  | Quarterly Visitors |
|---|--------------------|
|  Amazon        | 36,811,000         |
|  Leboncoin.fr  | 26,895,000         |
|  Cdiscount     | 22,877,000         |
|  Fnac          | 19,121,000         |
|  Vinted        | 17,214,000         |
|  Crossroads    | 15,267,000         |
|  E.Leclerc     | 14,438,000         |
|  AliExpress    | 13,658,000         |
|  Booking.com | 13,054,000         |
|  lidl        | 12,951,000         |

Source <https://www.fevad.com/>

# France e-commerce Growth ( Billions ) 2005 to 2021



Source  
FEVAD  
© Statista 2022

Additional Information:  
France; 2005 to 2021

# 2021 France Amazon



**22% eCommerce  
Market Share**



**Revenue €7B  
up 28% in 2020**



**22M or 33%  
French people shop on Amazon**



**10 orders on average  
per user per year**



**14,500  
Employees**



**Amazon Logistics Centres  
staff walked out over pay rise  
of 3% vs 5%**

# eCommerce Platforms

# Top 10 eCommerce Carts



37% of eCommerce websites are built on customised platforms, with many of these being large merchants doing more than \$20M+ in online sales

When acquiring these customers, the sales cycle is significantly longer as integration efforts are higher. Businesses need to consider a war chest and provide the merchant with a monetary inducement to complete the integration

# Shipping



# eCommerce France Shipping Market

From our analysis, Colissimo is the most popular shipping company used by eCommerce retailers in France. Trailing Colissimo is Chronopost, UPS, DHL, and DPD.

Around 44 percent of French consumers expect free delivery from online merchants, with fast delivery coming in close at 43 percent.

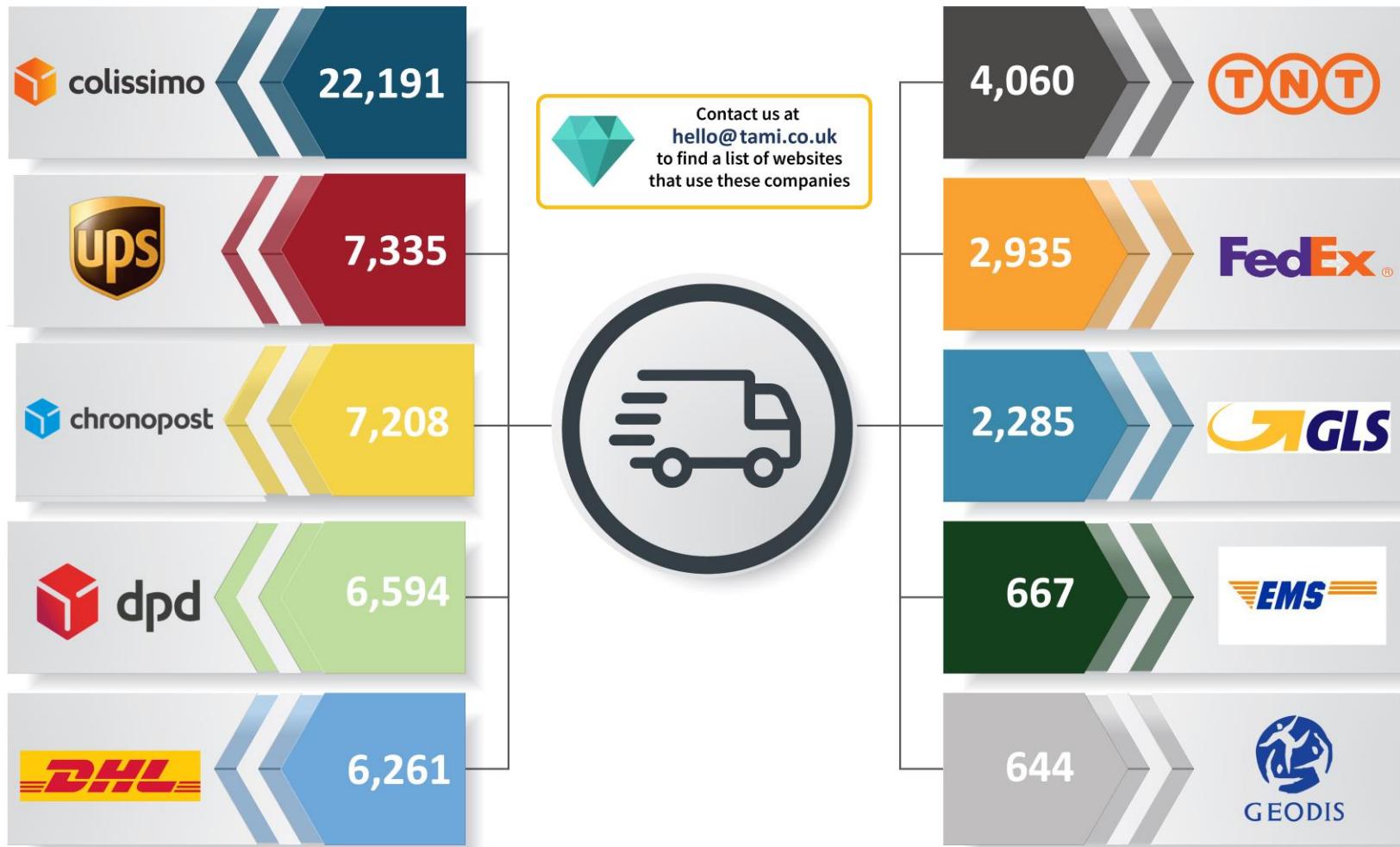
In 2020, according to Effigy Consulting, over 1.5 billion parcels were delivered in the courier, express, and parcel (CEP) market in France.

Amazon was the largest private parcel courier in the France last year as it capitalized on the dramatic increase in delivery volumes during lockdown.



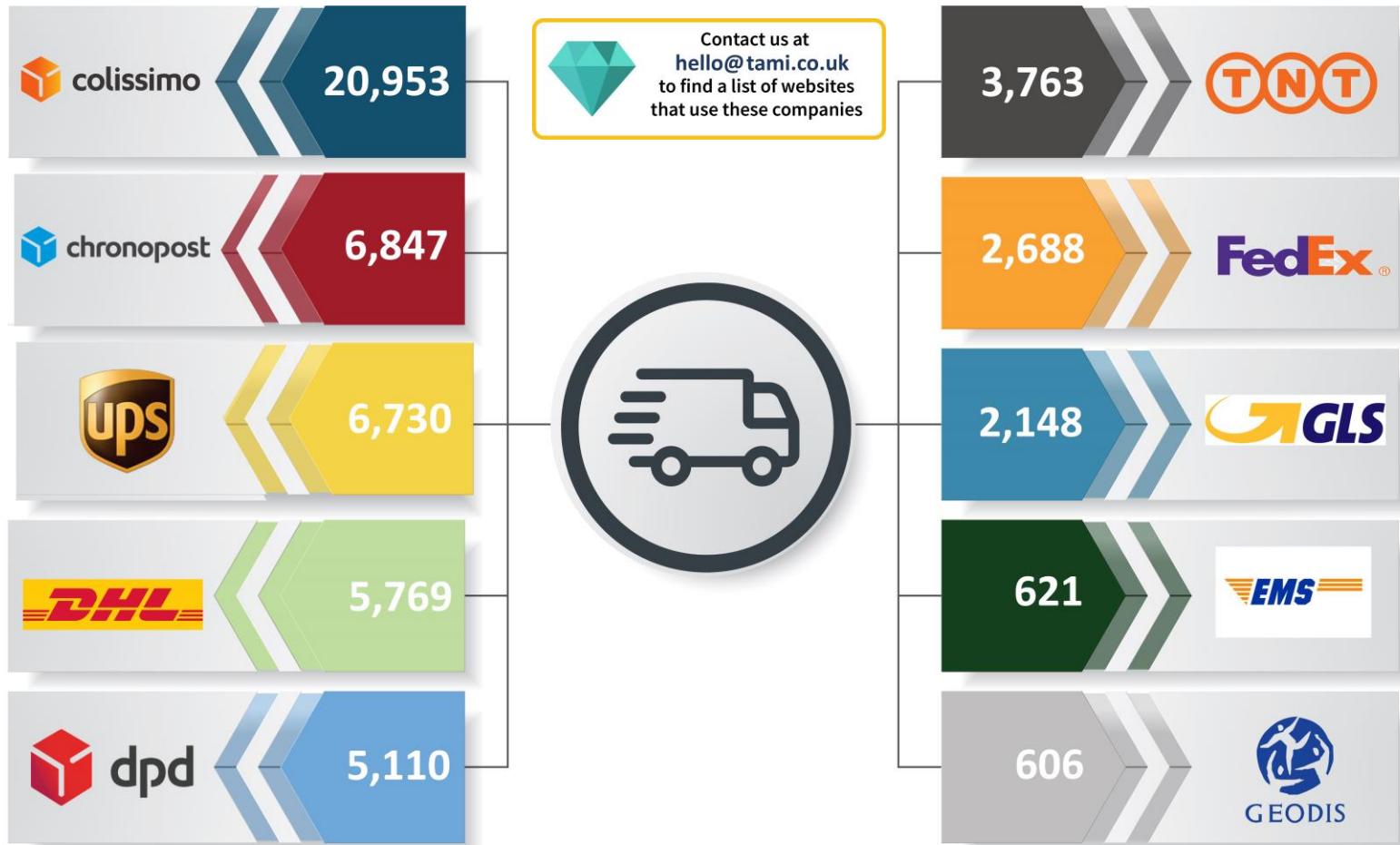
# Top 10 Shipping Companies

Based on analysis of 125K websites that ship products, the following are the top shipping companies mentioned on their websites excluding Amazon



# eCommerce - Top 10 Shipping Companies

Based on analysis of 90,932 e-Commerce websites that ship products, the following are the top shipping companies mentioned on their websites excluding Amazon



# Shipping Terms

Based on analysis of 91K French shipping websites, here is the % breakdown of merchants that provide the following services:



Only 13% of merchants in France offer free shipping to customers, and only 4% offering next day shipping. Amazon on the other hand, offers free delivery on many products to France, Austria, Belgium, Liechtenstein, Luxembourg and the Netherlands , and next day shipping for Prime customers.  
26% of merchants ship internationally with 8% of eCommerce merchants shipping products use more than 1 carrier

# Payments & eCommerce

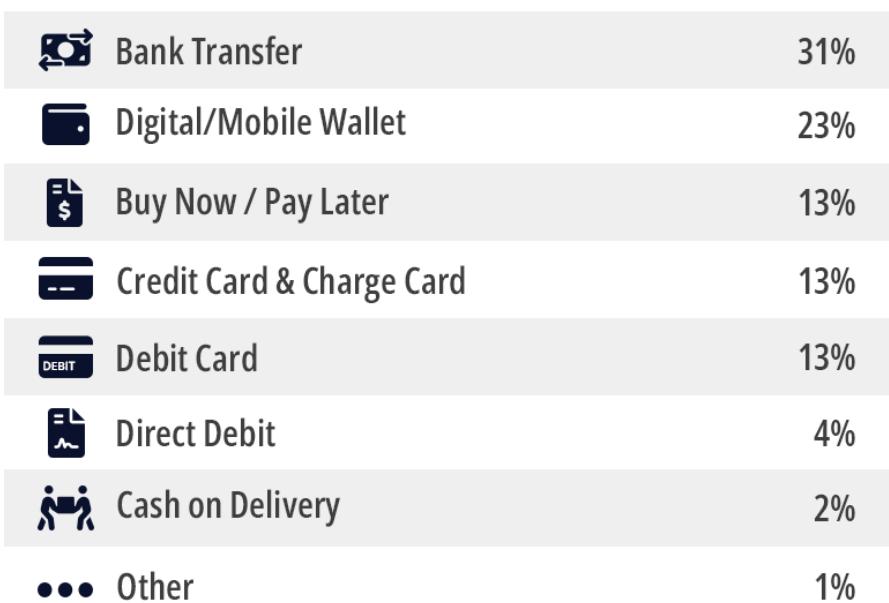


# France eCommerce Payment Insights

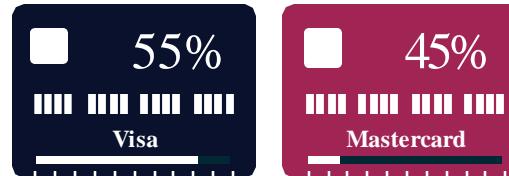
French e-com expansion of 9% CAGR is projected through 2025, while payment methods demonstrate stability. Cards combined accounted for slightly more than half of e-com transaction value in 2021, with credit (34.9%) outpacing debit (16.6%).

By 2025, credit cards are projected to account for 38.1% share, remaining the most popular e-com payment method. Digital wallets account for more than 25% of e-commerce share which is expected to remain stable through 2025. Cards are even more dominant at the POS, accounting for 82% of transaction value in 2021.

## 2020 e-com mix by payment method



## 2020 card brand breakdowns (e-com and POS)



# Top 10 Payment Companies



67% of all France eCommerce merchants declare who they use for payment processing on their website either via image, text or JavaScript.



61% of these merchants are using PayPal which is a massive share of the market.



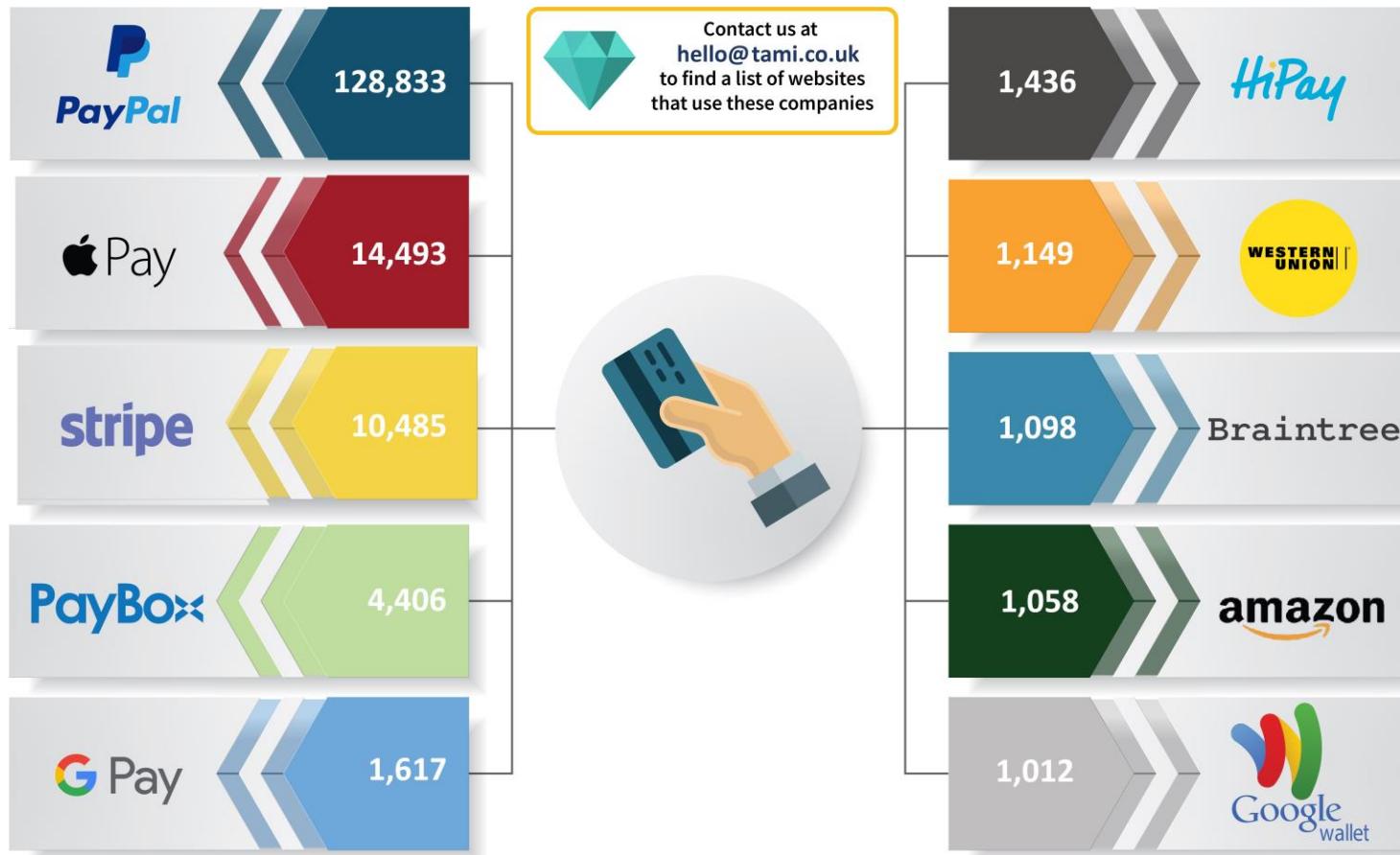
Apple jumped up to 2<sup>nd</sup> place with 14,493 eCommerce merchants now supporting Apple Pay as mobile payments are increasing due to the pandemic.



Stripe has moved to 3<sup>rd</sup> Place followed by PayBox.

# Top 10 Payment Companies

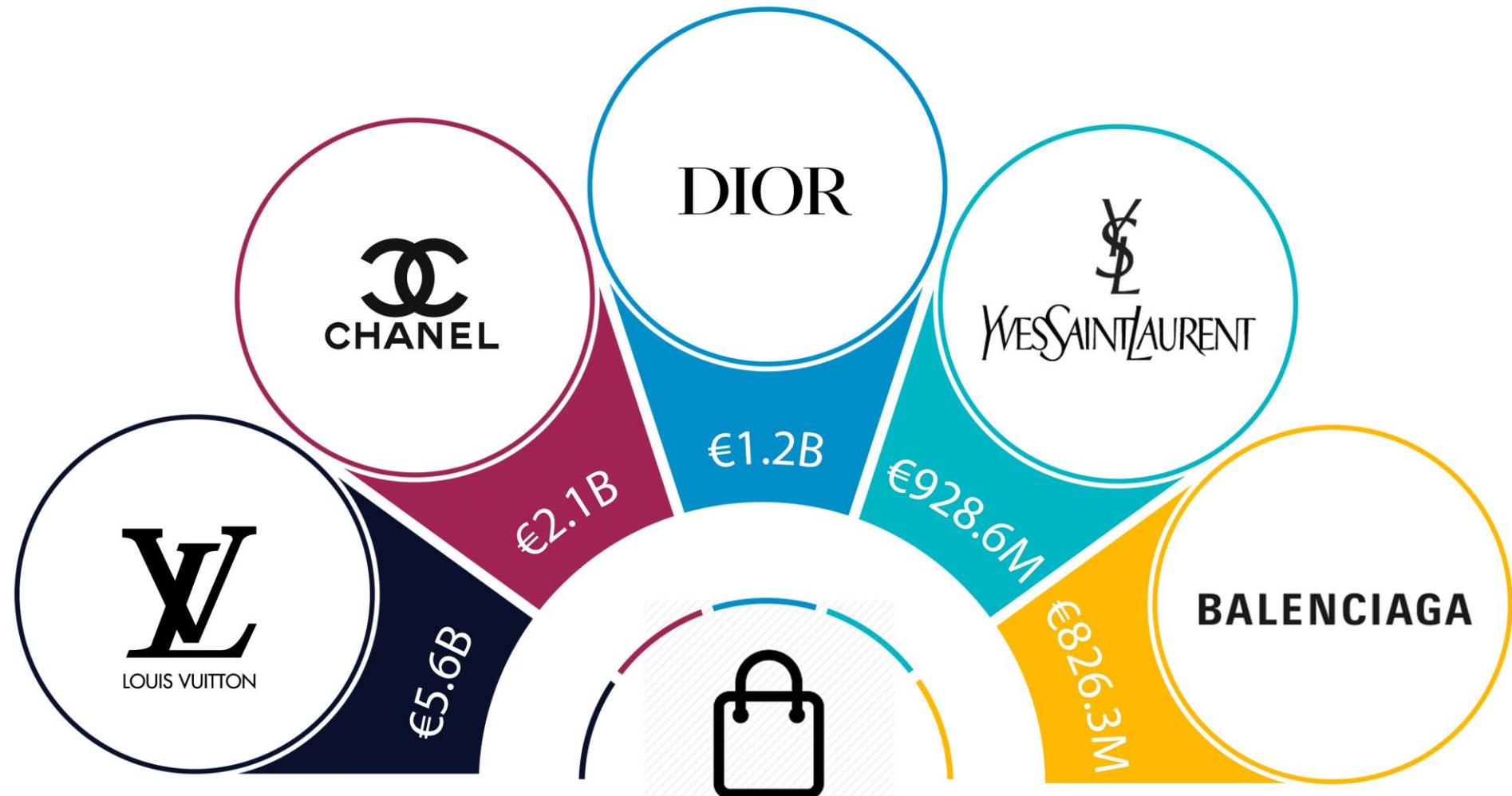
Based on analysis of 212K eCommerce websites the following are the top payment companies used by France merchants



# Key Players by Industry – France eCommerce Market

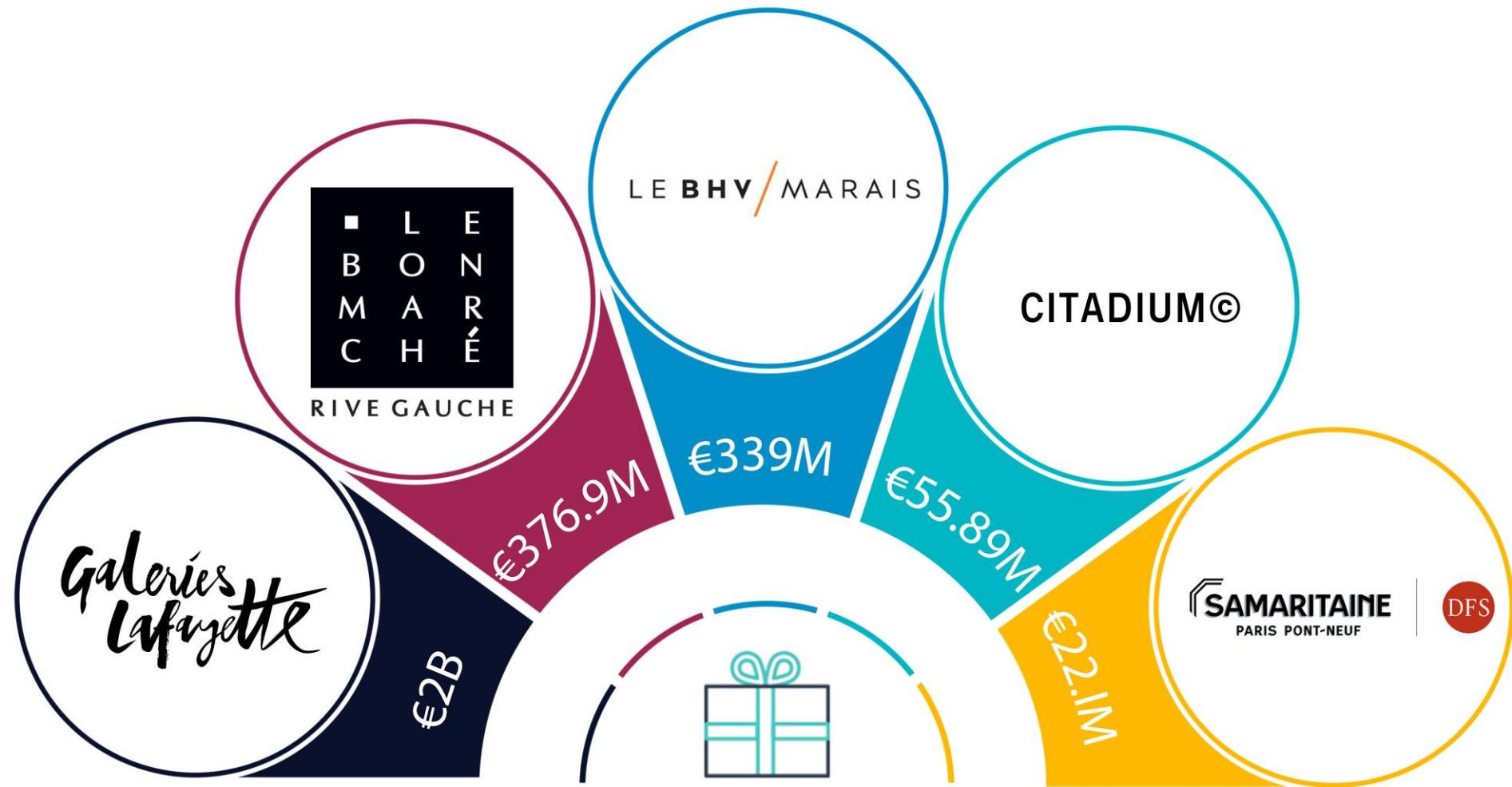


# Top France Companies - Fashion



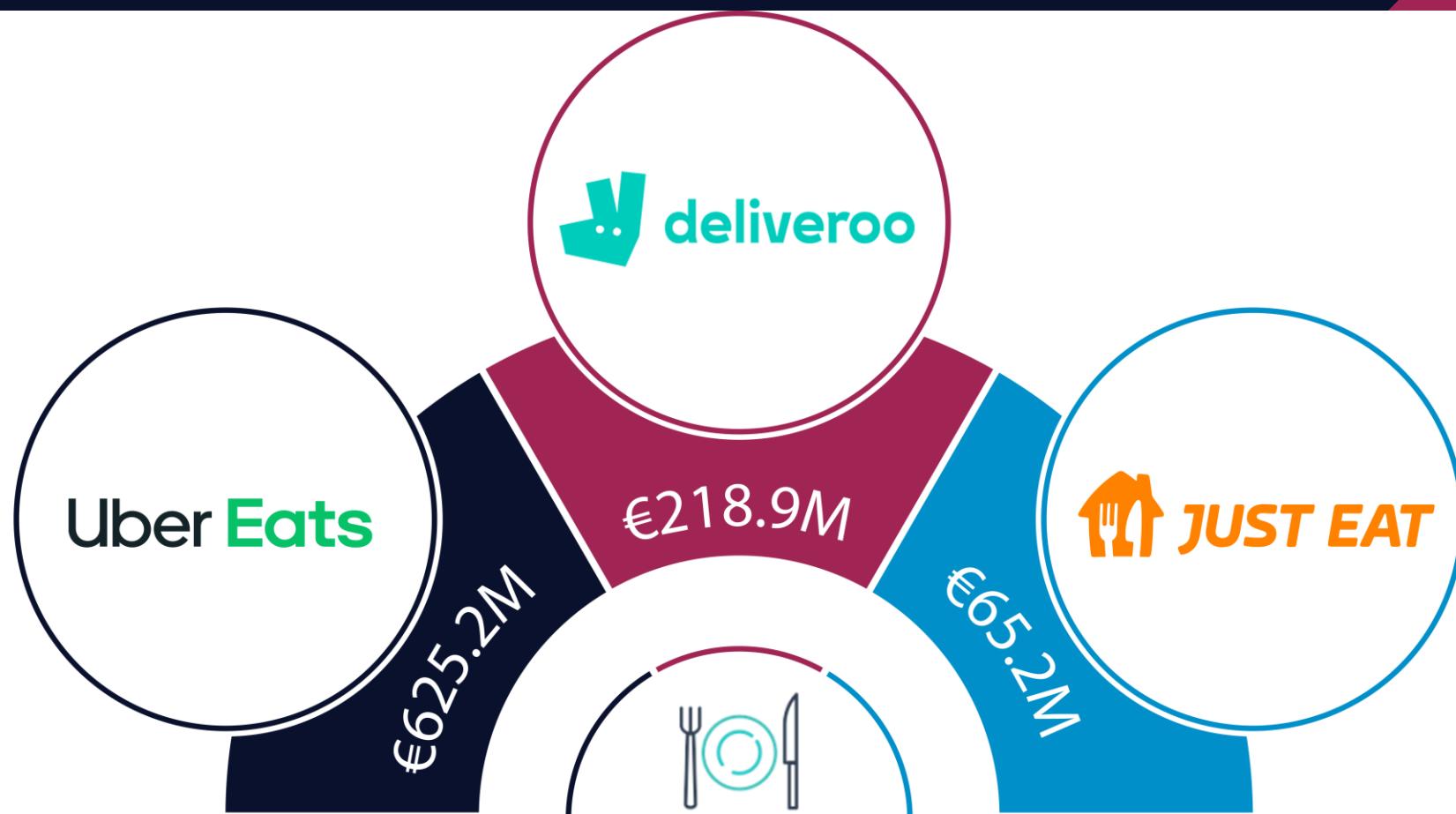
Retailers invariably don't declare a breakdown between their online & instore revenue. French Fashion market is renowned for top brands such as Louis Vuitton and Channel

# Top France Companies – Dept' Stores Online



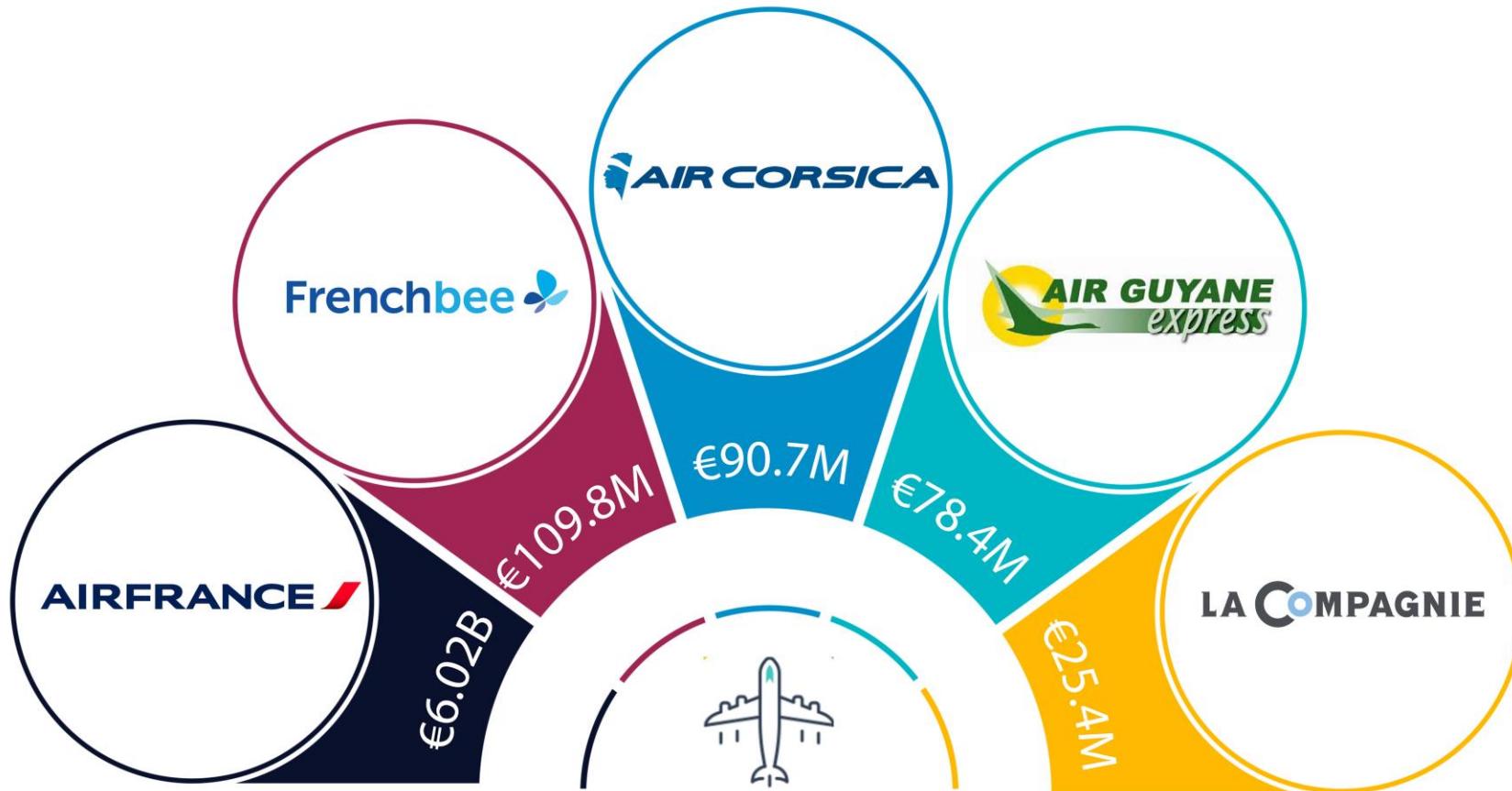
While brick-and-mortar is being steadily replaced by e-commerce propositions in many other Western countries, department stores and bookstores are thriving in France. E-commerce adoption is on the rise, but it has not as negatively impacted the French high street as it did in the UK.

# Top France Companies – Food Delivery



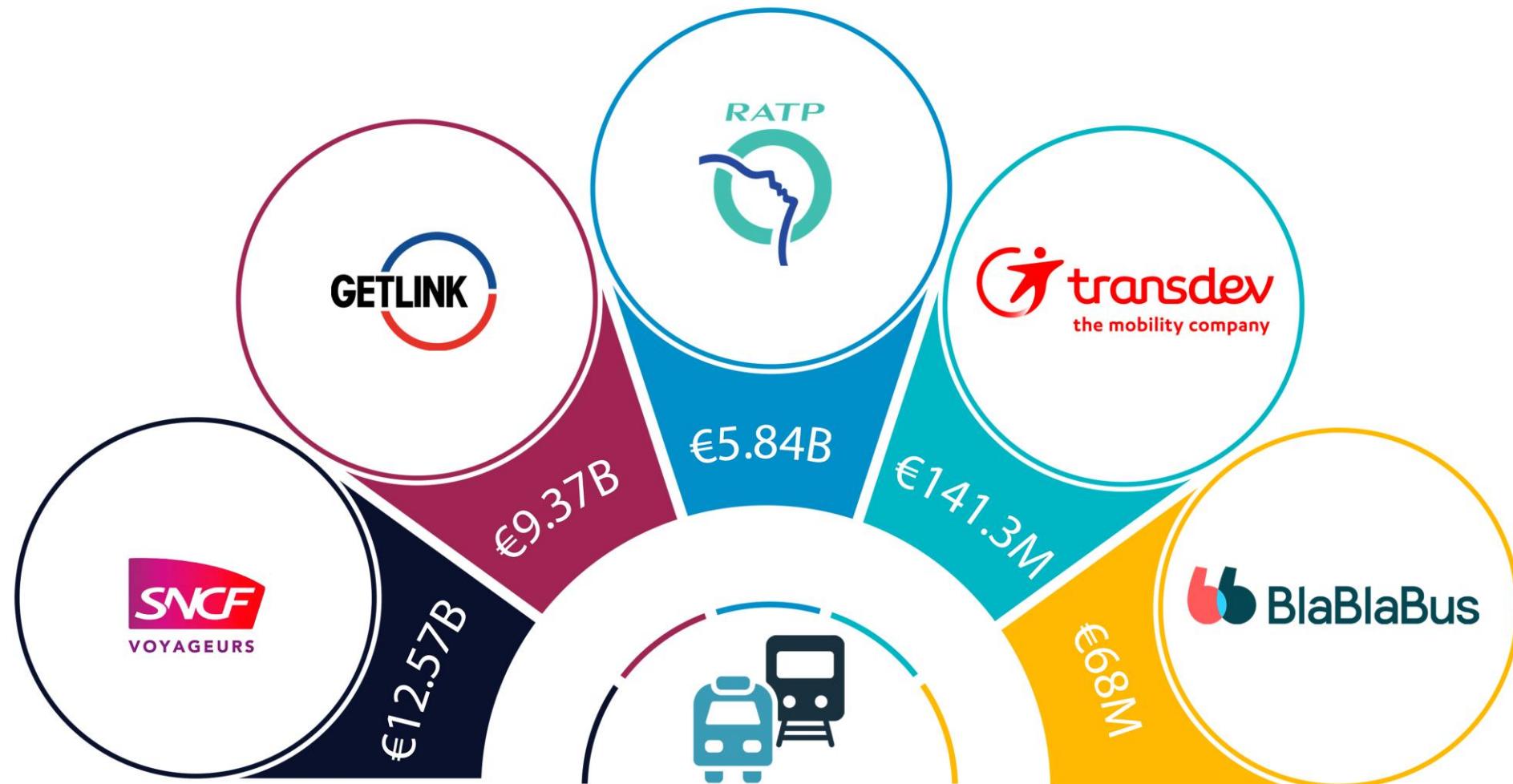
Starting off the year Uber Eats remained above the competition claiming a 52 per cent stake of the market, followed by Deliveroo with 36 per cent, Just Eat at 9 per cent and Frichti rounding out the bunch with 3 per cent of their own.

# Top France Companies - Airlines



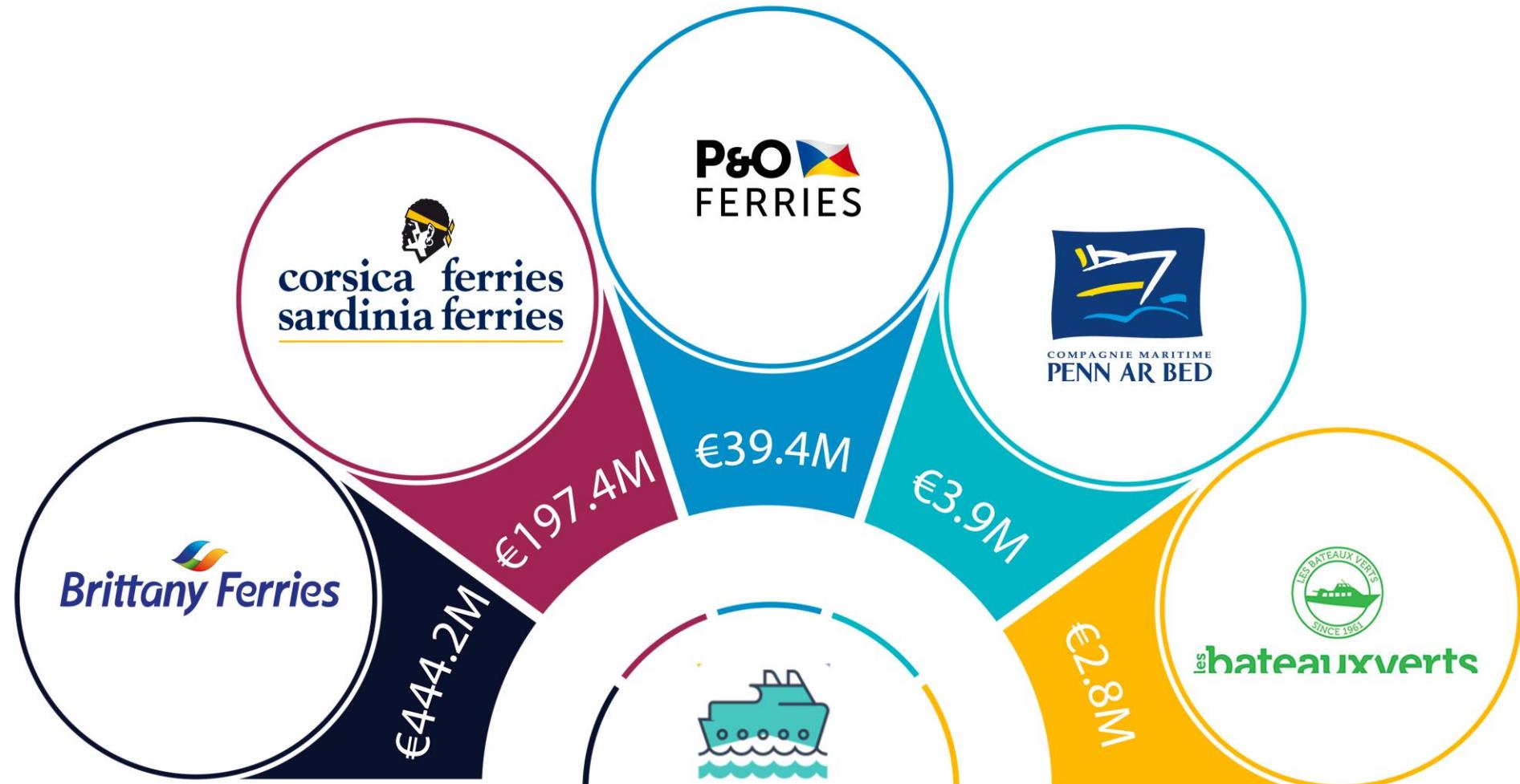
France last spring became the world's first major economy to enact a nationwide ban on short-haul domestic flights on routes where train journeys of two and a half hours or less. This is expected to reduce the volume of flights by 12% annually, with Germany, Austria and Sweden likely to follow the French example.

# Top France Companies – Public Transport



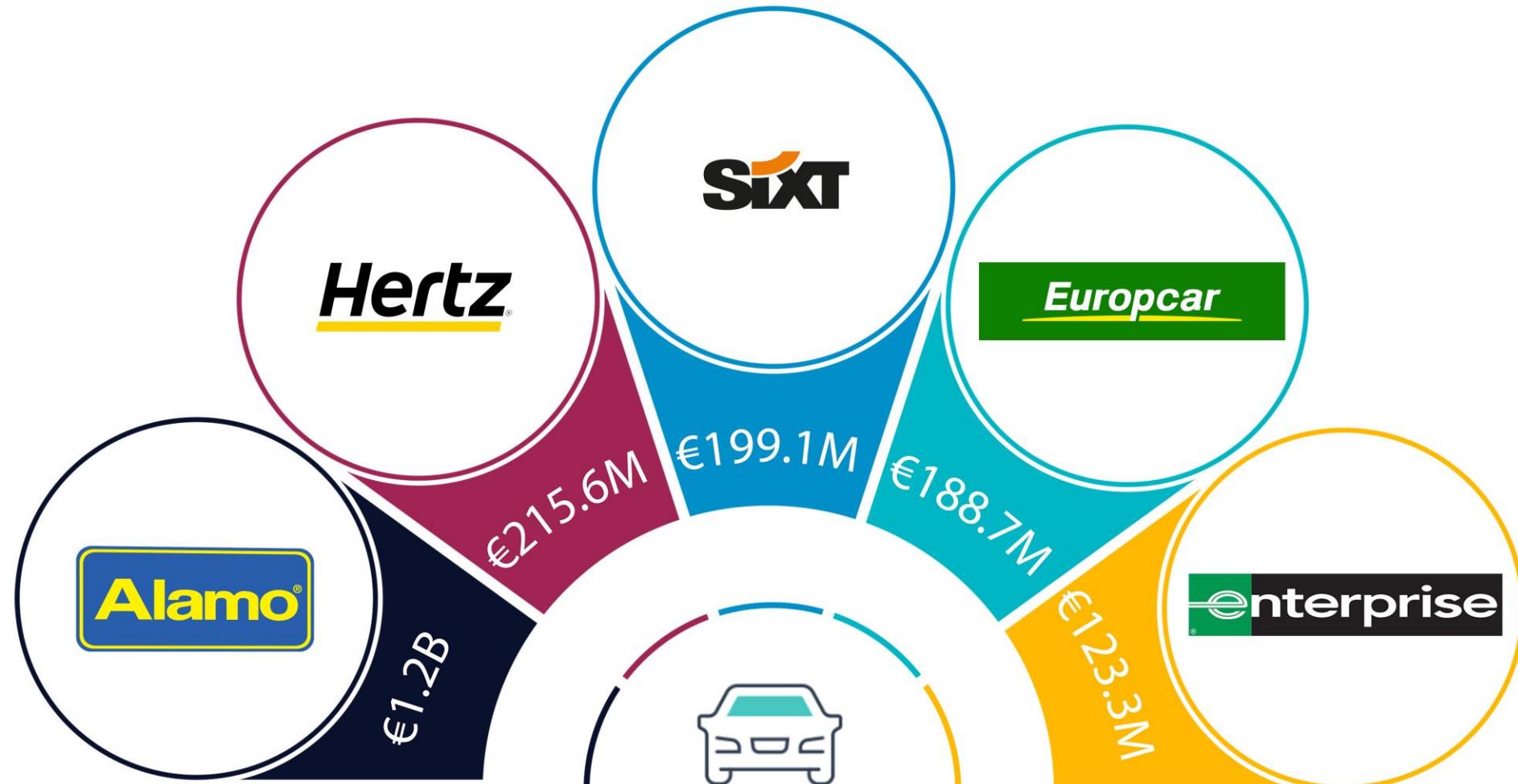
Transportation in France relies on one of the densest networks in the world with 146 km of road and 6.2 km of rail lines per 100 km<sup>2</sup>. Public transport should receive a boost from a short-hall flight ban which came into effect in April this year (see previous slide).

# Top France Companies - Ferries



Shipping companies have been severely impacted by Covid-19 restrictions, strikes, unfavorable Sterling-Euro exchange rate and Brexit, but Brittany Ferries, who recently published some of the most disappointing figures in their history, expect passenger number to recover to 2019 levels in 2022.

# Top France Companies – Car Hire



According to car hire comparison site Carigimi, there was a 40% drop in rental cars on the market between 2020 and 2021. The mass sell-off of fleets during Covid has led to challenges in restock, mainly due to supply chain impacted car production, and is likely to stifle recovery. Make sure to book your car hire early!

# Top France Companies - Cinemas



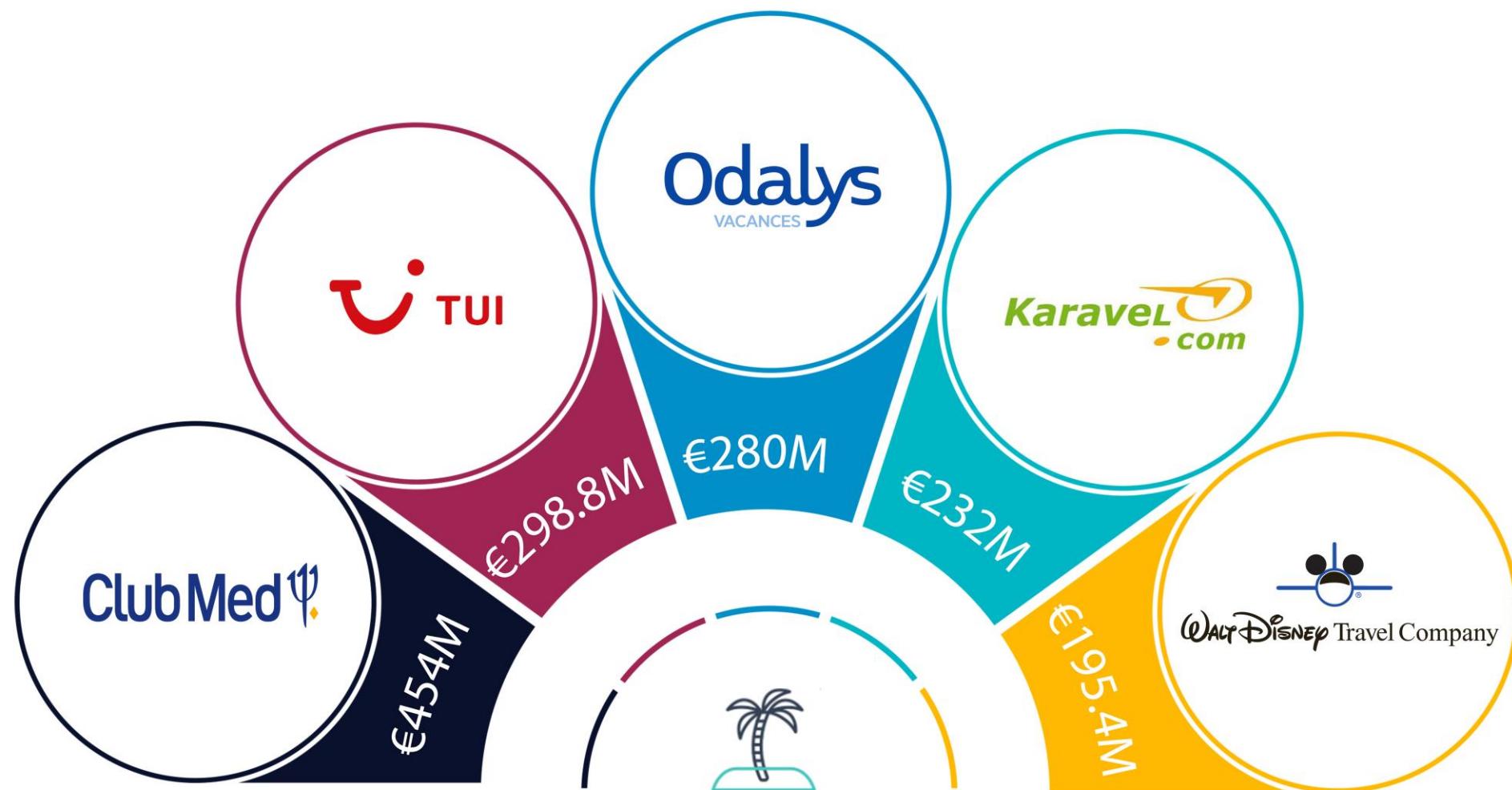
Despite a decline, French cinema attendances have held up favorably against the rest of Europe during the pandemic. Interestingly French films accounted for 40.8% of all movies attended in 2021 (42.4% for US movies).

# Top France Companies – Insurance



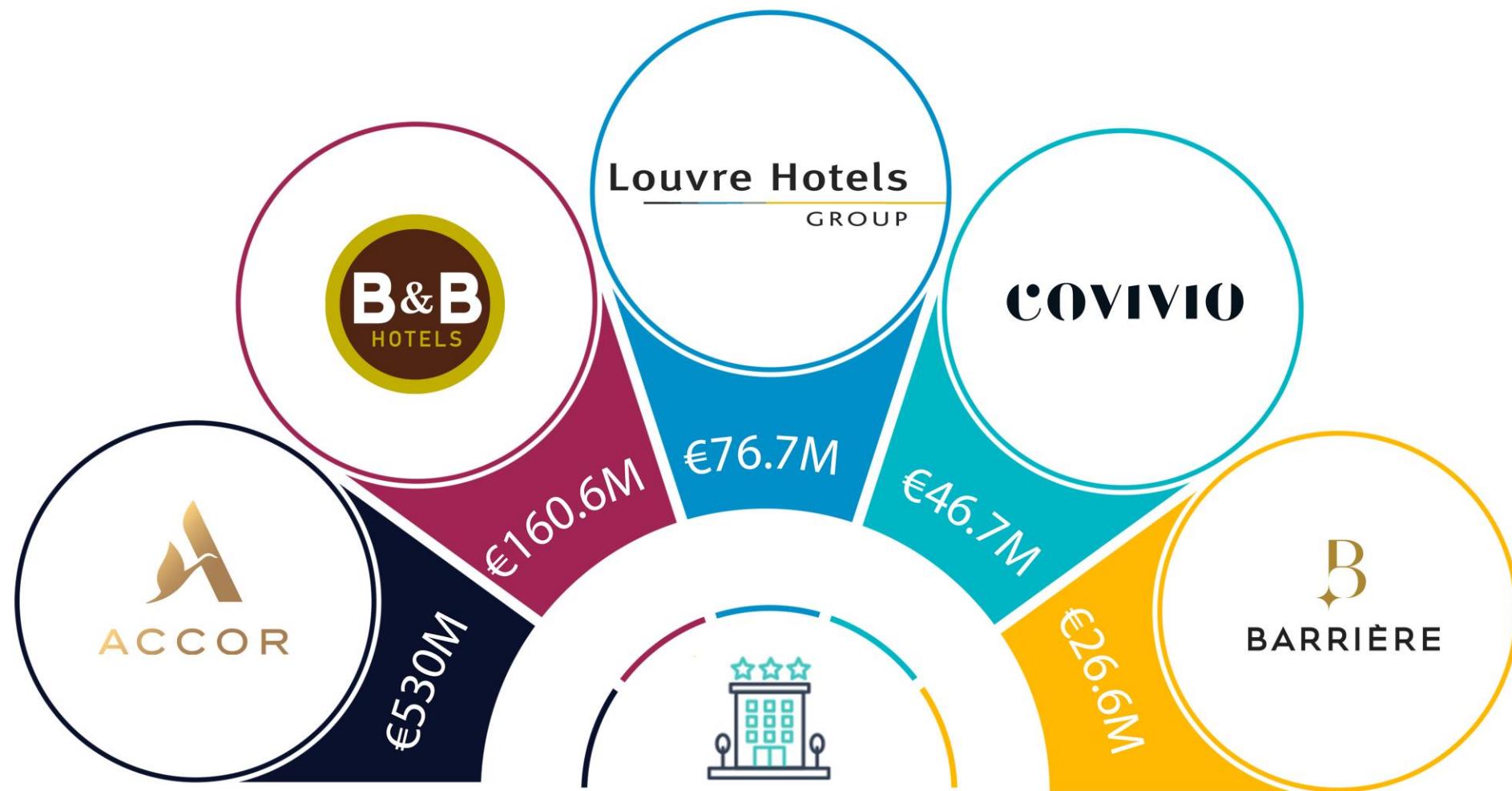
France is one of the world's most developed insurance markets, ranking fifth globally and second in Europe. French citizens are legally obliged to take out a number of different insurances. Fitch ratings offers a neutral outlook for the French insurance sector in 2022.

# Top France Companies – Travel Agencies



Despite some ongoing challenges, including long airport queues, 2022 is expected to see a strong recovery. Over the Easter weekend, North American tourists were almost as numerous as pre Covid-19 levels. A good indication of things to come!

# Top France Companies - Accommodation



Pre-Covid France was the most visited country in the world, accounting for almost 8% of the country's GDP. Hotel group Accor expects domestic demand to return to 2019 levels by year-end 2022.

# Top Football Clubs



The French league is the fourth biggest by revenue in Europe, behind England, Spain and Italy respectively. Paris Saint Germain (PSG) is the only French club by revenue in the top 30 in Europe, coming in at number six.

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