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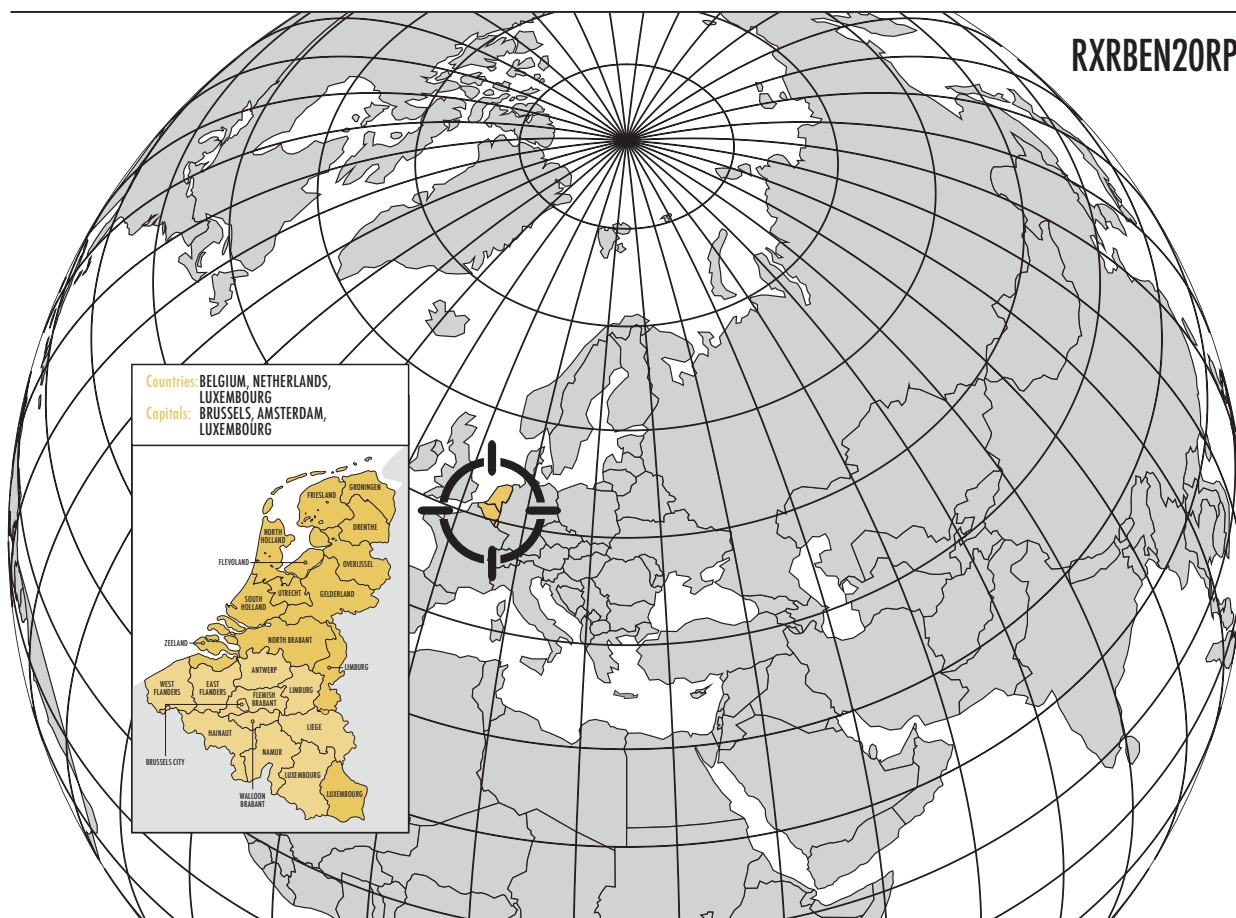


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# BENELUX 2020

## Ecommerce Region Report

RXRBEN20RP





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# INTRODUCTION



Welcome to the Benelux Ecommerce Region Report for 2020, the latest in our series analysing key ecommerce markets in Europe and around the world.

The report is something of a departure for us in that, in looking at an area that consists of Belgium, Luxembourg and the Netherlands,

the scope is wider than our country reports. We have chosen to adopt this approach not just because the Benelux region is tightly integrated economically, but because it is a region that will grow in importance in ecommerce terms in the near future.

One specific reason for this lies in Brexit. With the end of the United Kingdom's post-Brexit transition period all too likely to increase friction in cross-border trade from the country, many retailers are taking long-term decisions about where they will need, for example, warehousing and administrative centres from which to serve Europe. The Benelux countries, core members of the European Union and the Single Market, are inevitably being considered when these kinds of discussions take place. Famously, Amazon's European HQ is already in Luxembourg, in great part because of the tax advantages this offers.

The region enjoys other advantages too. The ports of the Netherlands have long been central to world trade. The Port of Rotterdam is Europe's largest sea port, the only European port in the top 10 ports in the world by cargo volume. It makes sense to have distribution centres close to where so many imports arrive. In addition, we should not forget that Benelux is a potentially lucrative market for retailers in itself, with sophisticated consumers comfortable with the idea of shopping online.

As we outline in the pages that follow, it is also instructive to look at Benelux because it is diverse in terms of having so many groups that think of themselves as distinct from near neighbours. Get localisation right in Benelux, with its different nationalities and languages, and you can get it right anywhere.

As ever, I look forward to your feedback and comments. ■

Ian Jindal, CEO, RetailX

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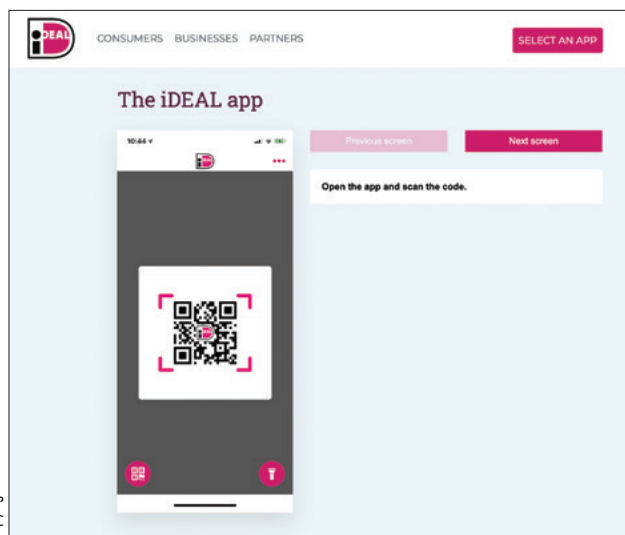
Sources are given on each page and links to references for sources are on page 38

## SPOTLIGHT ON THE BENELUX RETAIL MARKET

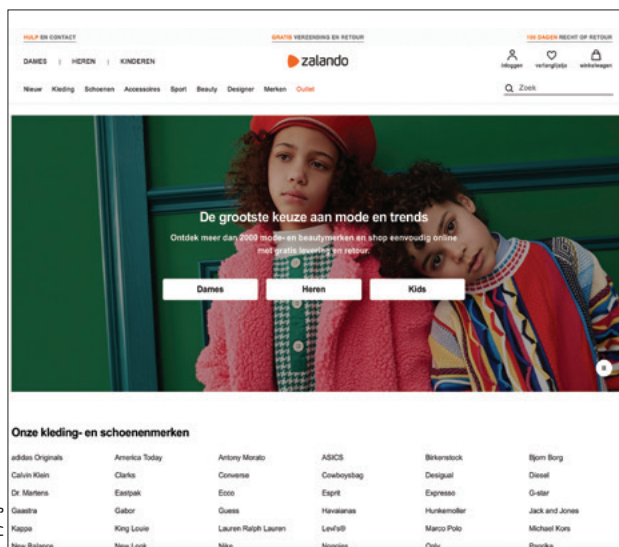
Few parts of Europe have such a diversity of customs, languages and preferences as the Benelux region. Yet the extra effort to meet the needs of such different groups can open up a wealth of ecommerce opportunities

The European region of Benelux is comprised of three countries – the Netherlands, Belgium and Luxembourg – which formed a politico-economic union in 1944. 93% of its population of 29.3m use the internet, with 79% already shopping online. In 2019, the total ecommerce market was worth €38bn. It is predicted to grow at 12%.

While the region can be counted as one in terms of ecommerce, there are distinct differences in consumer behaviour, language, market size and predilection to shop across borders. The Netherlands, for example, has the largest population, at 17m. It is also the largest ecommerce market, contributing €26bn (68%) against the €11.4bn (30%) spent online in Belgium. 96% of Dutch consumers use the internet, with 84% shopping online in 2019.



iDeal is the most popular payment method in the Netherlands



Copyright © Zalando

German retailer Zalando is popular with Dutch customers

While Luxembourg is the smallest of the three countries, consumers there are the most likely to shop online across borders. Just 30% of consumers in Luxembourg buy from domestic retailers, preferring instead to purchase online from retailers in other countries. 86% of online consumers in Luxembourg have bought from retailers overseas, with 80% buying from other countries within the EU.

In comparison, in 2019, 95% of consumers across the Netherlands bought from domestic retailers, with 40% buying online from retailers in other EU countries. These contrasting figures highlight the maturity of the Dutch ecommerce market and the relative lack of domestic ecommerce traders in Luxembourg.

### THE COST OF RETAIL

The Netherlands, Belgium and Luxembourg are founding members of the European Union, along with France, Germany and Italy, so the currency of each is, naturally, the Euro. All three countries rank highly in terms of ease of starting and conducting business, capacity to access the internet, skills, cultural acceptance and supporting policy. Each one is also among the global leaders in terms of supply chain and logistics infrastructure.

Sales tax (VAT) in the Netherlands and Belgium is 21%. It is lower in Luxembourg, at 17%.





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With a diverse, mature ecommerce market in the Netherlands, Dutch customers are happy to shop online without crossing borders

## DELIVERY, LANGUAGE AND PAYMENT EXPECTATIONS

Many languages are spoken across Benelux, with each country having its own official language (or languages) as well as others that are commonly used. Dutch is the official language of the Netherlands, with English and German also spoken. Dutch is also one of Belgium's official languages, along with French and German, yet English is also spoken. Luxembourgish, French and German are all official languages in Luxembourg.

Benelux is known for its frugality, with 'price' being given as the main reason for consumers in Belgium and the Netherlands to shop online. These shoppers are on the look-out for better, cheaper deals. A fifth (21%) of Dutch consumers have concerns around the security of online shopping. Consumers in Luxembourg, however, where people shop online more often, are less worried about internet security – just 8% say that they are concerned.

Dutch consumers know that they can buy what they want from Dutch multichannel and pureplay retailers, so they also expect fast delivery. One-day to two-day delivery is normal but some retailers offer faster fulfilment. Marketplace bol.com, for example, is cited as an exemplar of Dutch online behaviour, staving off market competition from Amazon while setting the standard for online businesses among its Dutch and Belgium consumers and the businesses that sell on its platform. Bol offers next-day and same-day delivery.

Different payment methods are used across the three countries, so the preference of individual consumers is something that needs to be taken into account when trying to attract customers across Benelux. The method of bank transfer known as iDeal is the most popular form of payment for online purchases in the Netherlands. In Belgium, it is credit and debit cards that are used for the majority of purchases. 44% of consumers chose this payment method in 2019, while ewallet was used by 22%.

Emoney transactions, including electronic wallet and digicash, are becoming increasingly popular in Luxembourg. These two methods saw a 95% growth rate between 2014 (1,536m transactions) and 2018 (2,994m transactions).

## SUMMARY

Marketplaces hold the largest market share for ecommerce across Benelux. Dutch retailer Bol.com holds the top spot in both the Netherlands and Belgium. Fellow Dutch retailer Coolblue ranks second in the Netherlands and Belgium. German fashion marketplace Zalando ranks higher than Amazon in the Netherlands, although the US giant only opened its online store in the Netherlands in March 2020. Previously, consumers in the Netherlands and Belgium visited Amazon's French site.

The Netherlands is by far the largest ecommerce market in Benelux, yet it is consumers in the region's smallest market, Luxembourg, who are most likely to browse on international retailers' websites and buy cross-border. ■



**Q&A: GREET DEKOCKER**  
Managing director,  
The Ecommerce  
Association, SafeShops

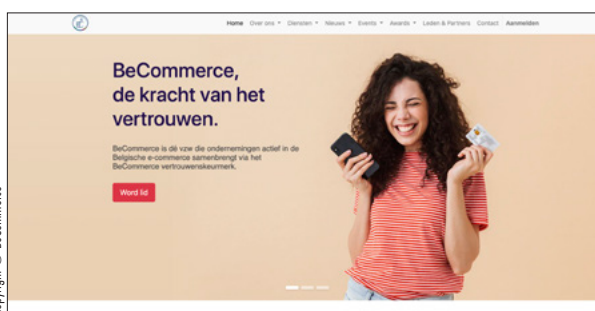
#### What's new in the market since 2019?

**Greet Dekocker:** Belgium is growing faster and faster. Each year we count up a billion extra euros in ecommerce sales. We are seeing more Belgian companies using platforms and marketplaces, yet in ecommerce, we were not the fastest movers. We see more mobile use by consumers, especially with the current Covid-19 crisis. Also, the question has now been asked, "Why don't we buy more locally?" This has led to smaller local shops, bakeries and butchers organising themselves to sell online more. This is continuing a trend of the growing number of shops online. In fact, we saw about 5,000 new ecommerce sites pop up last year. That's 13 a day. Regarding technology, you see chatbots becoming more important and AI is getting attention in certain sectors.

**Sofie Geeroms:** Since 2019, we have seen a trend towards a platform economy. M-commerce has adapted and v-commerce is on its way. Colruyt is working with Google Voice Assistant to start selling products this way.

#### What were the main drivers of ecommerce in 2019 and what do you think 2020's main drivers have been?

**SG:** New sectors finding their way to ecommerce. I think especially of toys, and the health and beauty sector, but also more insurance and credit-related products. The main driver for ecommerce in 2020 has been the coronavirus and the way it's put consumers in the driver's seat as they have discovered they can order so many kinds of products online.



BeCommerce promotes consumer confidence in ecommerce



**Q&A: SOFIE GEEROMS**  
Managing director,  
The Ecommerce  
Association, BeCommerce

#### What have been the main inhibitors of recent ecommerce market growth?

**SG:** If the Belgian market has long been immature, it's not due to the consumer, who was ready to buy online. Our own entrepreneurs failed for a long time to make the necessary investments in ecommerce. This failure was due to a lack of knowledge and an insufficiently entrepreneurial mindset. From a government side, we have to admit that our labour costs are not competitive with our neighbouring countries, neither is our concept of flexiwork.

**GD:** There are three main points. Firstly, mentality – we're not adventurous enough. Secondly, legislation and the difference between EU and China. There are issues with border taxes and customs, although it is improving and we should thank the EU Parliament for improving it. There are also differences in how to enter markets and, currently, the playing field is not equal – it's also not completely equal in the EU as well. Taxes and VAT are inhibitors that can make exporting difficult.

Thirdly, too much legislation enacted too quickly. Most of the time, policy is slower than innovation, yet ecommerce policies sometimes pass too quickly. There are already policy proposals around sustainability and ecommerce, for example, but let's first try to sell packages and then let's solve the way we sell them. Regulation such as geo-blocking is making it difficult for SMEs since it's hard to have an overview of all the regulation, which scares retailers off from being adventurous.

#### What, if any, are the best enablers in the market?

**GD:** Covid-19 is substantially changing the mentality of consumers and retailers. They are all starting to see the strategic impact of ecommerce. Another enabler would be AI, which can help with lower returns, better consumer experiences and faster search and find tools.

**SG:** People make the difference, whether it is the consumer or the entrepreneur behind a webshop. I would say a deep curiosity for new technology is important. More specifically, a passion to serve and know the consumer. Customer services become more prominent in ecommerce when the technology allows you to get to know your customer so much better.

### What are the impacts of marketplaces and platforms on entrepreneurs?

**SG:** Belgium's economy is evolving to a platform economy. They are big. In 2019, Amazon had more than 1,600 Belgian SMEs selling on its platform. Facebook and Bol.com are also important players. It is a good way to start in the Belgian ecommerce market. Even if your own webshop is doing well, being present on platforms broadens your market domestically and abroad. On the other hand, marketplaces are disruptive because they directly connect offer and demand.

**GD:** There is a negative attitude towards marketplaces, especially in Belgium, because we don't have a local marketplace for entrepreneurs to use. Belgian webshops on the Dutch marketplace Bol.com are still the minority. What I'm trying to tell entrepreneurs is they should see it as just another channel. On the one hand, you lose a little of your profit but on the other, marketing is also expensive. It's good to be local, but stay an entrepreneur and export after Covid-19. Don't shoot down marketplaces because it's another potential channel. Use it for some products and see what it does for your turnover. A marketplace can be an ideal way to export. Don't be afraid to try because you can always leave.

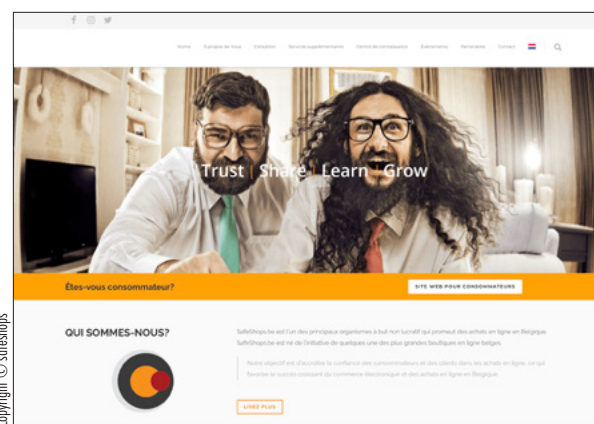
### What is the discussion around sustainability in the ecommerce market?

**GD:** It's becoming more important. There are two areas where consumers see problems. One is packaging – too much plastic, too much air/space in shipments. The second is mobility. Consumers see a lot of vans on the road and think they must be polluting heavily. Consumers have this perception that ecommerce delivery vans contribute massive amounts of pollution but this is not the reality. It just seems to be a more visible form of pollution for consumers rather than the invisible kind that occurs with shipments to/from physical stores. What we are doing is working together with postal carriers and big ecommerce members to make them move towards sustainable solutions by linking the packaging and ecommerce industries.

**SG:** There is a growing awareness that ecommerce needs to be sustainable. Consumers are sending contradictory statements: they desire a green last mile but are not willing to pay more for it. Retailers have to shift away from free delivery and returns policies towards asking their customers either to wait longer for the delivery, or pick items up themselves. Also, a lot of discussion is going on in the packaging industry about how to create reusable packages and how to rethink packaging for parcel and last mile purposes. We are working with stakeholders here – manufacturers, logistic players, policy makers and the Flemish Institute for Logistics (VIL).

### How is Covid-19 impacting the ecommerce market?

**SG:** The crisis pushed many local Belgian players towards



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### SafeShops promotes the growth of Belgian online retail sector

ecommerce. It changed perspectives. The con in this movement is that it is driven by a desire to serve local customers, whereas ecommerce is in the business of expanding your markets. Many local governments are looking at how to ease local retailers towards ecommerce through training and advice. In addition, many more consumers have 'unwillingly' discovered the convenience of ecommerce.

Logistics are still handling this substantial increase in ecommerce without having been prepared. In the end, Covid-19 pushed many ecommerce thresholds up. However, this boom has not compensated the loss of revenues in physical shops. The entertainment, travel and accommodation sectors are not doing well. Overall, the boom in selling products online has not compensated the loss of revenues in physical shops, nor the loss of online services due to lockdown.

**GD:** Despite logistics struggling at times, consumers are having some positive experiences in ecommerce and are also picking up the habit of ordering more frequently online. Retailers will need to keep the experience positive. The current winner appears to be food because there are so many opportunities to deliver general as well as niche products. ■



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BeCommerce is the Belgian non-profit organisation that actively brings companies together on the Belgian digital market. BeCommerce's goal is to stimulate the growth

of the entire ecommerce sector

[www.becommerce.be](http://www.becommerce.be)



SafeShops.be

SafeShop is committed every day to increase the confidence of consumers, companies and governments in ecommerce, and therefore also in your webshop

[www.safeshops.be/fr/](http://www.safeshops.be/fr/)





## Q&A: WIJNAND JONGEN

The best-selling author and chief executive of Thuiswinkel.org offers his thoughts on the Dutch ecommerce market

### What is new in the market since 2019?

The impact of digital commerce is growing and consumer behaviour is, more than ever, supporting the transition of retail into digital commerce. It is not just online but also online/instore. Consumers are at the heart of these changes. They are in the control room and the transition of retail is being influenced by this. But of course, we are still at the beginning of the transformation of retail.

### What have been the main inhibitors of ecommerce market growth?

The Dutch market is a small one. I often compare it to the small village we once were, only now we are opening to the big world. I think the Dutch market is well positioned to face challenges but there's a challenge from international retailers. We see more of these international retailers flocking to the Dutch market, both from inside and outside of Europe. We see Dutch retailers increasingly going cross-border. We are now facing challenges that other countries have already faced for some years, such as how we need to create level playing fields for EU/non-EU platforms for online retailers.

Out of €25bn plus, somewhere around €1bn is spent with online shops outside of the Netherlands. Many of the orders that take place outside the country are only small amounts, such

as items that Dutch people buy from Chinese websites. While the order numbers are large, the average amount of each sale is relatively low. Aside from China (via Alibaba), most cross-border purchases are from the UK and Germany. Only about 200m orders are placed with Chinese online shops, while at least 600m orders are placed in online shops in Germany and the UK. We are in a good position to compete.

### Progressing towards the end of the year, what are your priorities as an ecommerce association?

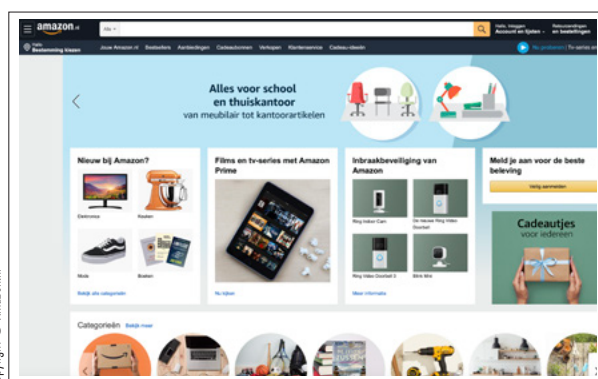
Obviously, the first priority is dealing with this new coronavirus situation. The Dutch market is well positioned to come out of the crisis stronger than we went into it. I think positive trends will be strengthened by this new situation. Ultimately, the transition of retail will be speeded up by the coronavirus crisis. The merging of offline and online will become the new normal, while local retailing, physical and online will all be strengthened.

I think it is crucial to reach consumers wherever they are, so if your product or service has options for a physical store, that may be the way to go. But it's not for everybody. I would look more into the differences in consumer behaviour. Is the best way to reach consumers by online shops? Or by new co-operative ventures that you want to set up? Or perhaps platforms? There's a whole mix of new channels available for digital commerce players. Sometimes a physical store will help, although not in all categories and not for everybody. It is very specific, depending on your target audience.

Turning to social media and m-commerce, both are growing fast. It is still relatively small when compared with other countries but it is growing in the Netherlands and here I believe the crisis will give m-commerce an enormous push. I also think the impact of influencers is growing but obviously not at the level of other countries such as the US and China.

### What are the impacts of marketplaces and platforms on entrepreneurs?

Now that Amazon has come to Holland, the Netherlands will have to deal with a giant new player, although I think our market is well positioned to welcome them. There are reasons why Amazon did not come into the Netherlands many years earlier. One is that we already have well-developed marketplaces. The Dutch are lucky to have trustworthy webshops and a great infrastructure. The service level of most online shops in the Netherlands is relatively high, so it's not like another country where Amazon can set a new standard in terms of service. We believe we are well positioned to welcome Amazon in a market that is still growing, and where we still have a pie that can be shared.



Amazon has only recently entered the Dutch online market



The platforms are gaining more market share in the Netherlands. That is one big trend we saw in 2019 and which is continuing into 2020, so we expect that trend to keep developing. Platforms are becoming more and more important for consumers but also for retailers. This is because platforms give retailers one more channel or option to reach greater numbers of customers.

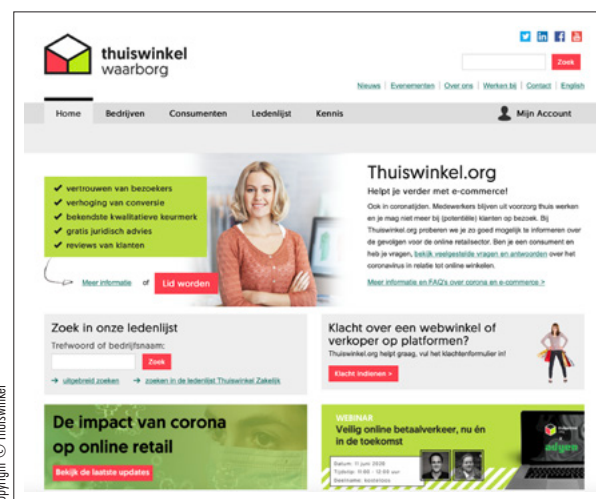
### What is the discussion around sustainability in the ecommerce market?

Sustainability is a big trend after many years when it really was not at the core interest of retail. We have set the standards, for example, for reductions on CO<sub>2</sub> and reduction in materials, and we are working with the sector to set ambitions and goals. We have worked with distributors and the Dutch government. For instance, we have initiated a tool where online retailers can see what the CO<sub>2</sub> impact is on every sale on their website in relation to the consumer. That includes the way the consumer wants to have the product delivered at home. We collect the data of all distributors and retailers and this feeds into a tool that gives back the data to individual retailers. It also offers the opportunity to individual retailers to use that data at the checkout to influence consumers on how and when they want to have their orders delivered. That is now being implemented by Dutch webshops and it gives us an incredible amount of data for online shops, as well as a means to help consumers to make the right and greenest decision.

### What impact is the Covid-19 pandemic having on the Dutch ecommerce market?

It has affected the Netherlands hugely. After an initial voluntary closure of many stores, retail stores in high streets have opened again. Yet 2020 will be a year of decline for traditional retail, as many stores will continue to suffer from a lack of consumer spending due to uncertainty and lack of consumer confidence.

We see a very different picture on the online side of the retail market. In many categories, turnover increased 40, 50 or even 80%. Think food and drinks, DIY, sports, home living, office equipment and entertainment. For the remainder of 2020, we expect newly adopted consumer behaviour to be sustained. We have a hard time keeping up on the demand side but as an organisation that's in touch with all the distributors, we are doing a good job getting stuff to people's homes. Overall, I think in the long term we are well positioned to be and become even more relevant for consumers and businesses, now and in the future.



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Thuiswinkel.org has around 2,000 members

It is just a matter of overcoming problems with capacity. The demand is bigger, yet the capacity is still not up to meeting that demand. This has to do with the whole supply chain – from distribution centres and warehouses to being able to deliver groceries to people's doorsteps. For example, online supermarket Picnic was able to launch its new distribution centre earlier than expected. Others are not able to do this. Sure, one can add hundreds of people but ultimately, there is a struggle for capacity in the supply chain, from warehouses to cars having to deliver. Yes, you can upscale but only to a certain level. Everyone is trying to upscale faster. ■

Thuiswinkel.org is the inspiring commerce network that helps companies, entrepreneurs and their employees to become more successful. It offers relevant and practical solutions through lobbying, the 'Thuiswinkel Waarborg' trustmark, knowledge, research and education. Its objective is to improve trust in distance selling and to make cross-border trading easier



# MARKET OVERVIEW



## THE NETHERLANDS

**CURRENCY:** EURO (EUR)

**OFFICIAL LANGUAGE:** DUTCH

**OTHER LANGUAGES SPOKEN:** ENGLISH, GERMAN

**VAT:** 21%

## BELGIUM

**CURRENCY:** EURO (EUR)

**OFFICIAL LANGUAGES:** DUTCH, FRENCH, GERMAN

**OTHER LANGUAGES SPOKEN:** ENGLISH

**VAT:** 21%

## LUXEMBOURG

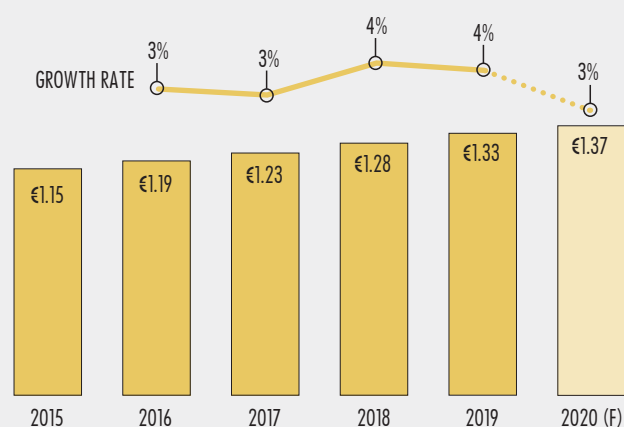
**CURRENCY:** EURO (EUR)

**OFFICIAL LANGUAGES:** LUXEMBOURGISH, FRENCH, GERMAN

**OTHER LANGUAGES SPOKEN:** ENGLISH

**VAT:** 17%

## GROSS DOMESTIC PRODUCT OF BENELUX IN €TN, 2015-2020 (F)



SOURCES: QUANDL, INTERNATIONAL MONETARY FUND

## GDP COUNTRY PROFILES IN €BN

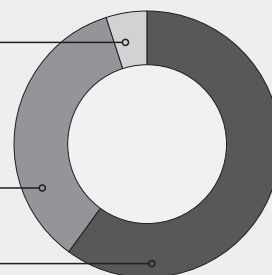
	BELGIUM	LUXEMBOURG	THE NETHERLANDS
2015	€411.01	€51.58	€690.01
2016	€424.66	€53.30	€708.34
2017	€439.05	€55.30	€737.05
2018	€451.27	€58.21	€772.69
2019	€465.05	€60.89	€799.27
2020 (F)	€479.09	€63.75	€826.13

## SHARE OF GDP, 2019

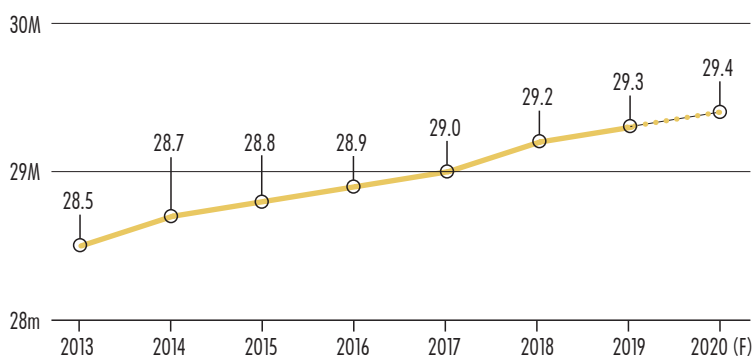
LUXEMBOURG 5%

BELGIUM 35%

THE NETHERLANDS 60%



## POPULATION OF BENELUX IN MILLIONS, 2013-2020 (F)



## POPULATION DENSITY

### THE NETHERLANDS

1. AMSTERDAM ..... 872,757
2. ROTTERDAM ..... 651,157
3. THE HAGUE ..... 548,838
4. UTRECHT ..... 357,597
5. EINDHOVEN ..... 234,394
6. GRONINGEN ..... 232,874
7. TILBURG ..... 219,789
8. ALMERE ..... 211,893
9. BREDA ..... 184,069
10. NIJMEGEN ..... 177,659

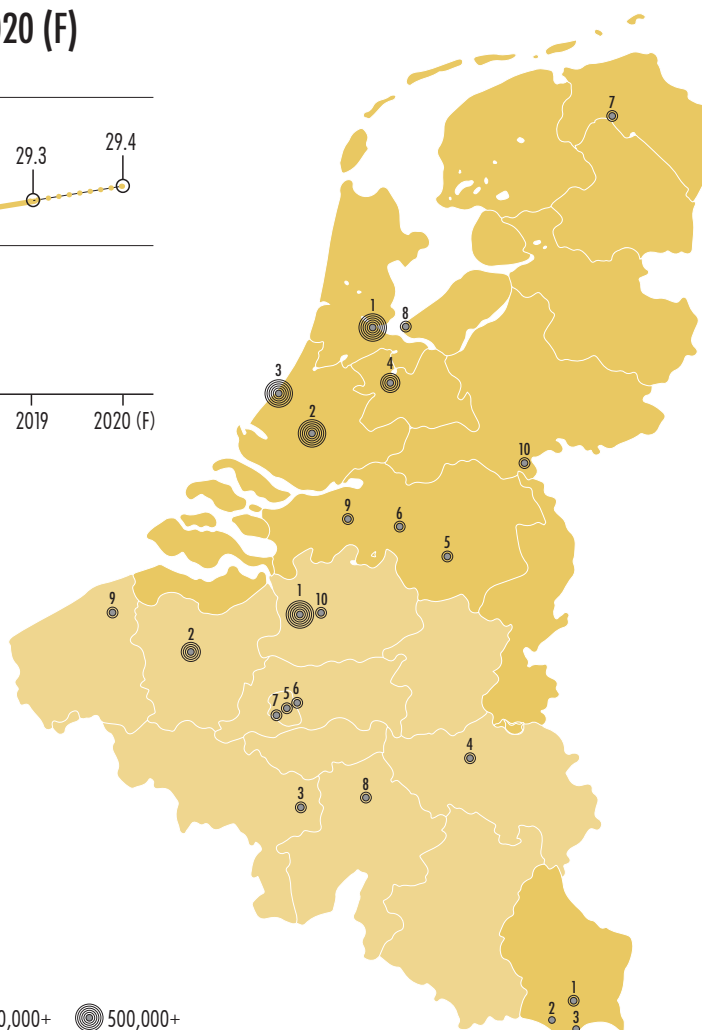
### BELGIUM

1. ANTWERP ..... 529,247
2. GHENT ..... 263,927
3. CHARLEROI ..... 202,746
4. LIEGE ..... 197,217
5. BRUSSELS ..... 185,103
6. SCHAERBEEK ..... 132,799
7. ANDERLECHT ..... 120,887
8. BRUGES ..... 118,656
9. NAMUR ..... 111,432
10. LEUVEN ..... 102,275

### LUXEMBOURG

1. LUXEMBOURG ..... 122,273
2. ESCH-SUR-ALZETTE 36,218
3. DUDELANGE ..... 27,409

• UNDER 100,000    • 100,000+    • 250,000+    • 500,000+



SOURCE: CITYPOPULATION.DE (2020)

## ECOMMERCE PERFORMANCE INDICES

INDICES	DEFINITION	GLOBAL RANK: BELGIUM	GLOBAL RANK: LUXEMBOURG	GLOBAL RANK: THE NETHERLANDS
LOGISTICS PERFORMANCE INDEX (LPI)	LPI measures performance along the logistics supply chain within a country	3 out of 160	24 out of 160	6 out of 160
EASE OF DOING BUSINESS INDEX	A high Ease of Doing Business ranking means the regulatory environment is more conducive to the starting and operation of a local firm	46 out of 190	72 out of 190	42 out of 190
E-GOVERNMENT DEVELOPMENT INDEX	The E-government Development Index measures the willingness and capacity of national administrations to use information and communication technologies to deliver public services	27 out of 193	18 out of 193	13 out of 193

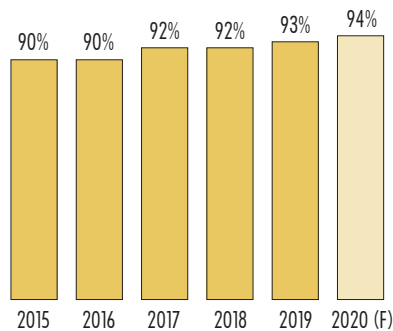
SOURCES: WORLD BANK, UNITED NATIONS

KEY: ● Top quartile    ○ Second quartile    ● Third quartile    ● Bottom quartile

# ECOMMERCE OVERVIEW

## INTERNET USAGE

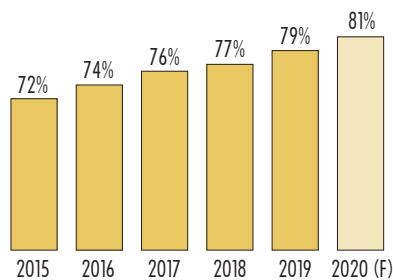
Share of the Benelux population using the internet



SOURCE: EUROSTAT

## ONLINE SHOPPERS

Share of internet users in the Benelux region shopping online



SOURCE: EUROSTAT

## INTERNET INCLUSIVITY INDEX

The overall Internet Inclusivity Ranking is based on how a country scores in the following categories (defined below): availability, affordability, relevance and readiness. Collating the category rankings in the right-hand column gives a country's overall Internet Inclusivity Ranking.

INDICES	DEFINITION	GLOBAL RANK: BELGIUM	GLOBAL RANK: THE NETHERLANDS
AVAILABILITY	Quality and breadth of available infrastructure required for access and levels of internet usage	27 out of 100	8 out of 100
AFFORDABILITY	Cost of access relative to income and the level of competition in the internet marketplace	26 out of 100	31 out of 100
RELEVANCE	Existence and extent of local language content and relevant content	15 out of 100	36 out of 100
READINESS	Capacity to access the internet, including skills, cultural acceptance and supporting policy	10 out of 100	11 out of 100
OVERALL INTERNET INCLUSIVE INDEX	Benchmark based on internet availability, affordability, relevance and the readiness of people to use it	21 out of 100	23 out of 100

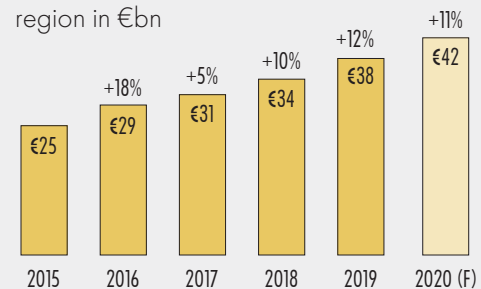
THE 100 ECONOMIES SELECTED FOR THE INDEX REPRESENT APPROXIMATELY 91% OF THE WORLD'S POPULATION AND 96% OF GLOBAL GDP

SOURCE: THE ECONOMIST INTELLIGENCE UNIT (2020)

KEY: ● Good ● Poor

## B2C ECOMMERCE TURNOVER

B2C ecommerce turnover for Benelux region in €bn



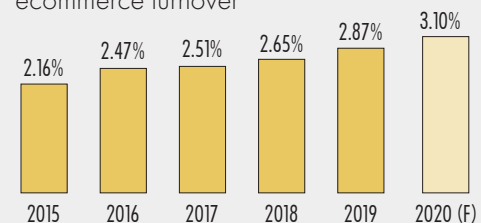
BELGIUM: GOODS 11%, SERVICES 66%

THE NETHERLANDS: GOODS 57%, SERVICES 43%

SOURCES: STATISTA, NATIONAL ECOMMERCE ASSOCIATIONS

## E-GDP

Share of total GDP made up by B2C ecommerce turnover



SOURCES: QUANDL, IMF, NATIONAL ECOMMERCE ASSOCIATIONS, RETAILX ANALYSIS



## COUNTRY DATA, 2019

### INTERNET USAGE

Share of population using the internet, by country, 2019



SOURCE: EUROSTAT (2019)

### ONLINE SHOPPERS

Share of the online population shopping online, by country, 2019

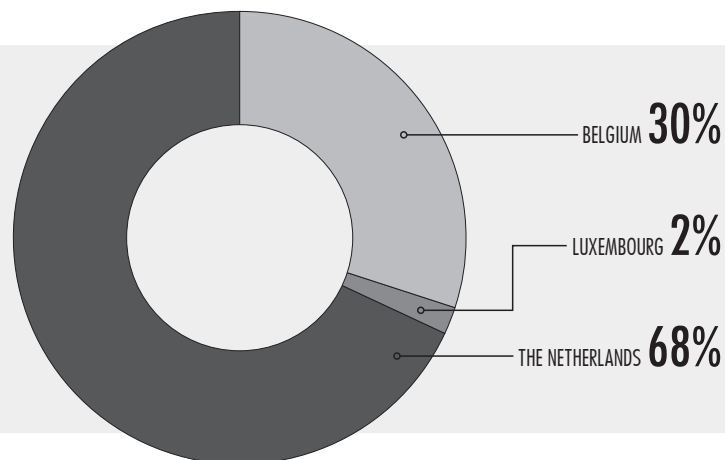


SOURCE: EUROSTAT (2019)

### ECOMMERCE TURNOVER SHARE

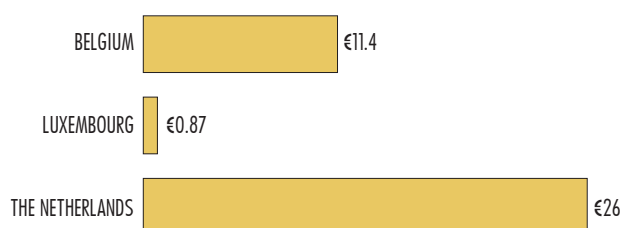
Country share of total B2C ecommerce turnover, 2019

SOURCES: STATISTA, NATIONAL ECOMMERCE ASSOCIATIONS, RETAILX ANALYSIS



### B2C ECOMMERCE TURNOVER

B2C ecommerce turnover by country, in €bn, 2019

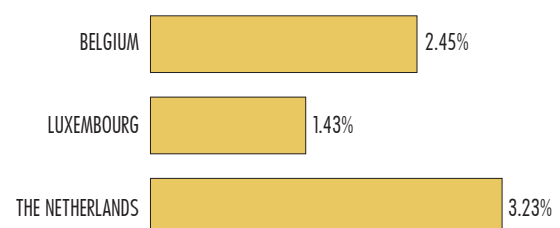


BELGIUM: GOODS 11%, SERVICES 66%  
THE NETHERLANDS: GOODS 57%, SERVICES 43%

SOURCES: STATISTA, NATIONAL ECOMMERCE ASSOCIATIONS

### E-GDP

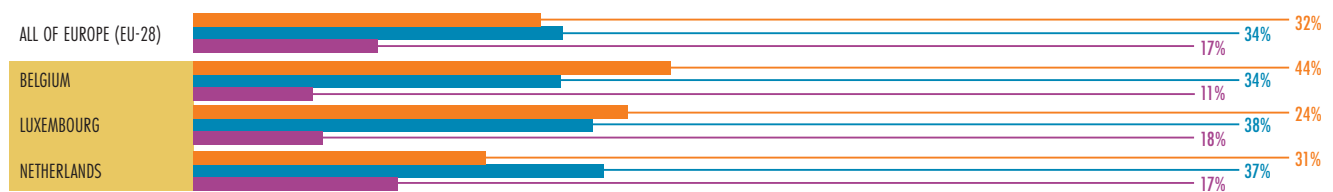
Share of total GDP made up by B2C ecommerce turnover, by country, 2019



SOURCES: QUANDL, IMF, NATIONAL ECOMMERCE ASSOCIATIONS, RETAILX ANALYSIS

## FREQUENCY OF ONLINE PURCHASES, 2019

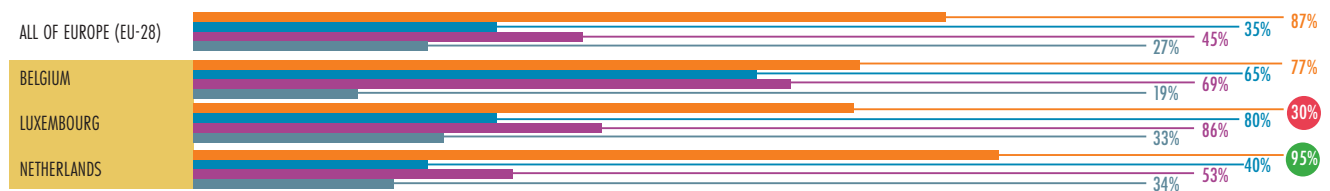
- Percentage of online consumers who made one or two online purchases over a three-month period
- Percentage of online consumers who made three to five online purchases over a three-month period
- Percentage of online consumers who made six to ten online purchases over a three-month period



SOURCE: EUROSTAT (2019)

## ONLINE PURCHASING NATIONALLY AND CROSS-BORDER, 2019

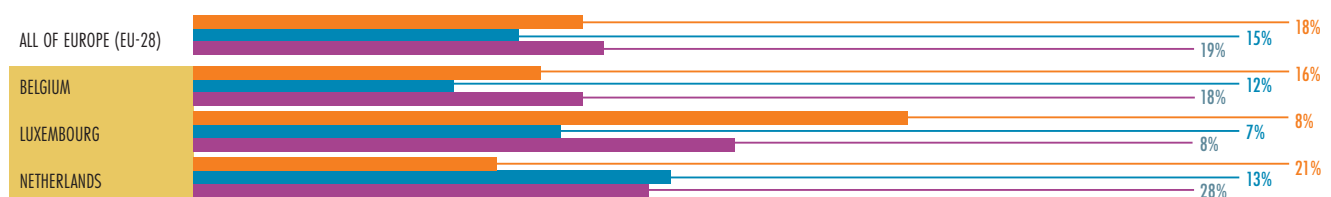
- Percentage of individuals who ordered goods or services, over the internet, from national sellers
- Percentage of individuals who ordered goods or services, over the internet, from other EU countries
- Percentage of individuals who ordered goods or services, over the internet, from sellers abroad (other EU or non-EU countries)
- Percentage of individuals who ordered goods or services, over the internet, from the rest of the world (non-EU)
- Country outperforming the rest of Europe
- Country underperforming compared to the rest of Europe



SOURCE: EUROSTAT (2019)

## SECURITY CONCERNS LIMITING OR PREVENTING INDIVIDUALS FROM USING THE INTERNET FOR SHOPPING AND BANKING IN 2019

- Percentage of internet users whose security concerns limited or prevented them from ordering or buying goods or services
- Percentage of internet users whose security concerns limited or prevented them from carrying out internet banking
- Percentage of internet users whose security concerns limited or prevented them downloading software, apps, music, video files, games or other data



SOURCE: EUROSTAT (2019)

## Join RetailX today and access exclusive research and webinars

RetailX offers the retail professional in-depth analysis of ecommerce markets by country, region and sector.

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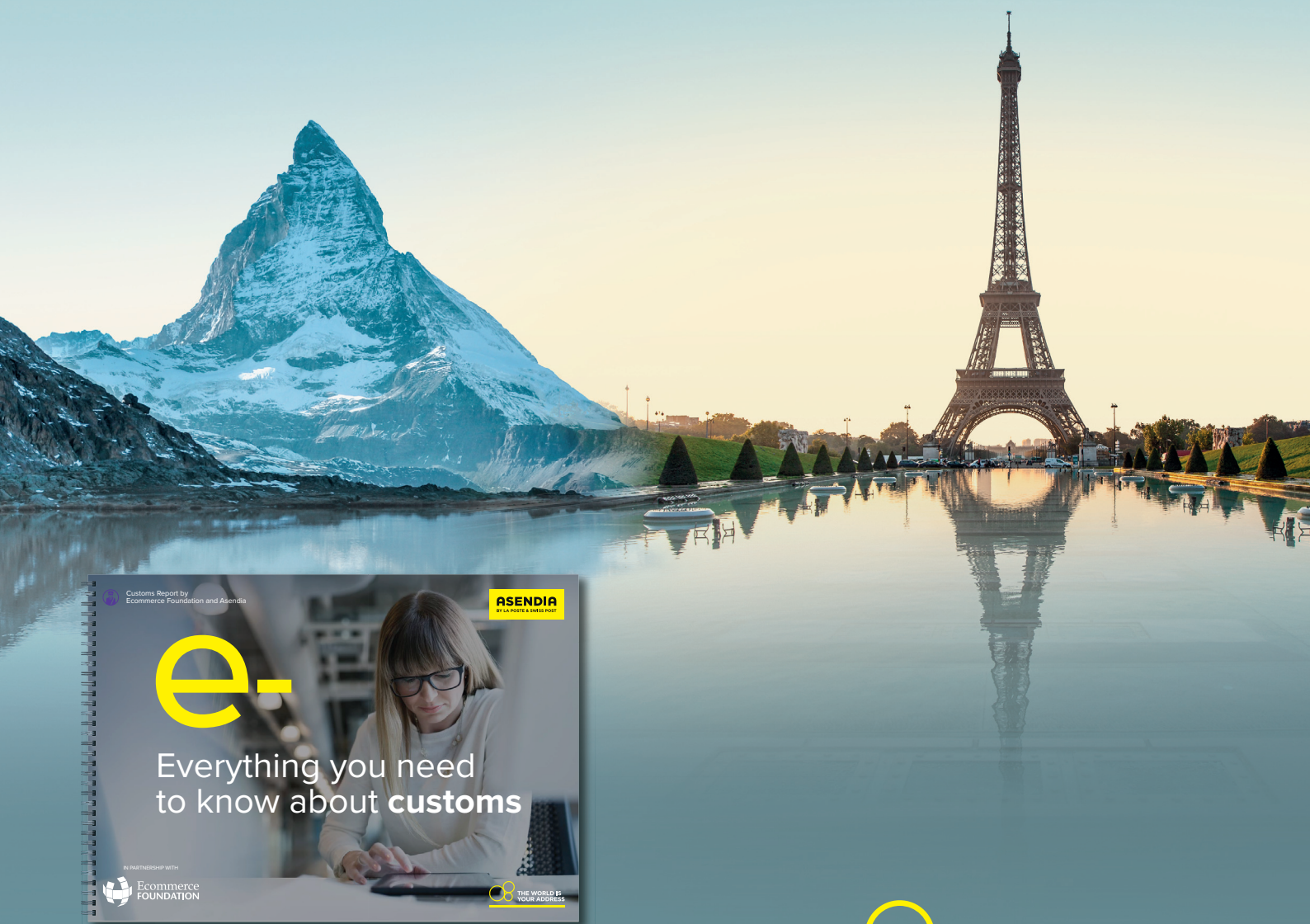




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**THE WORLD IS  
YOUR ADDRESS**





**Q&A:**  
**ELLEN KOP**

**ECOMMERCE  
INDUSTRY MANAGER  
BENELUX AND  
STRATEGIC ACCOUNTS,  
ASENDIA BENELUX**

Ellen is an ecommerce global delivery expert with 30 years of experience in international logistics. With a background in press and publishing, she started her career in logistics working as a sales agent for La Poste before deciding to make the switch to the dynamic world of ecommerce.

**What are the main characteristics you see concerning the Benelux region's ecommerce market size?**

Online food sales in the Netherlands have increased by 58% in 2020. This is a huge jump which shows that new consumers have entered the online grocery market.

We estimate around a quarter of e-shoppers will continue making digital purchases despite shops reopening and we expect a small number to avoid physical stores altogether.

**What, for you, has been the most exciting recent development in ecommerce?**

More brands are now opening new cross-border markets thanks to the boost that lockdown gave to online sales. Throughout the Covid-19 pandemic, we've seen an increase in webshops connecting to marketplaces in several countries. The higher order volumes and restricted working conditions have helped us learn and refine our methods to provide even better support to our clients.

**"We estimate around a quarter of e-shoppers will continue making digital purchases despite shops reopening and we expect a small number to avoid physical stores altogether"**

**What are the most common delivery types you see in the Benelux region? Will this change in the future?**

Home delivery still counts for the vast majority of all deliveries, although PUDO-deliveries have also resumed. New ways of providing proof of delivery to retailers, developed to comply with social distancing, mean home deliveries feel the safest option, so they will stay popular.

Many already existing ideas have begun to be implemented during the pandemic, helping to maximise the efficiency of ecommerce channels. For example, webshops are adopting omnichannel solutions at a faster pace.

**What are the most preferred products bought online in the Benelux region?**

The most popular products bought online in Belgium are pharmaceuticals, health and beauty products, food, toys and equipment for home working and gardening. In the Netherlands, the same products are popular both in retail and online, with IT, sports, home and living and food topping the list.

**What are the main trends you see when it comes to cross-border online shopping in the Benelux region?**

Last-mile players are key and postal operators are seen as reliable partners with well-functioning home delivery systems. Equally, shoppers are demanding sustainability and a reliable returns process.

The pandemic has helped us all to refine our approach to higher order volumes and seasonal peaks. It's also highlighted that trust is essential, and that good preparation ensures both retailers and consumers feel comfortable. ■

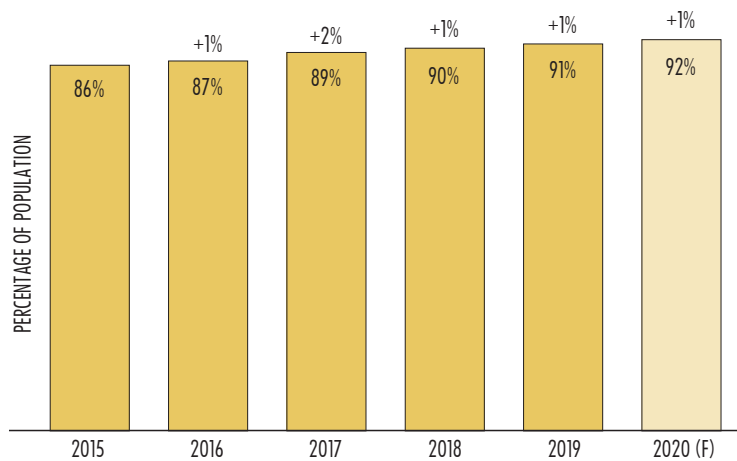
**ASENDIA**  
BY LA POSTE & SWISS POST

Formed in July 2012 as a joint venture between La Poste and Swiss Post, Asendia is one of the world's leading international mail and goods shipping providers. From ecommerce, direct mail and business mail to press solutions, it has the knowledge and experience to support businesses both locally and around the world.

[www.asendia.com](http://www.asendia.com)

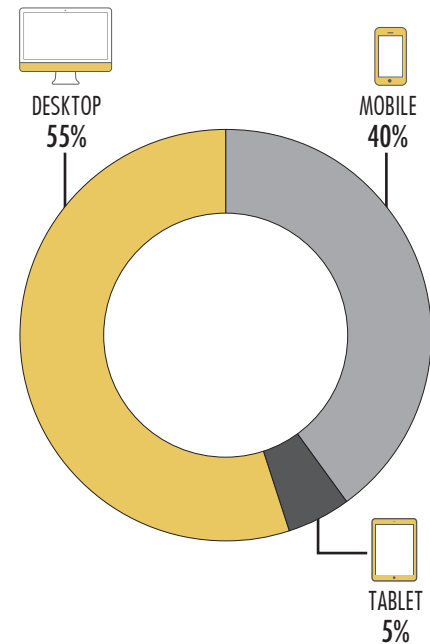
# BELGIUM

## INTERNET USAGE IN BELGIUM, 2015-2020 (FORECAST)



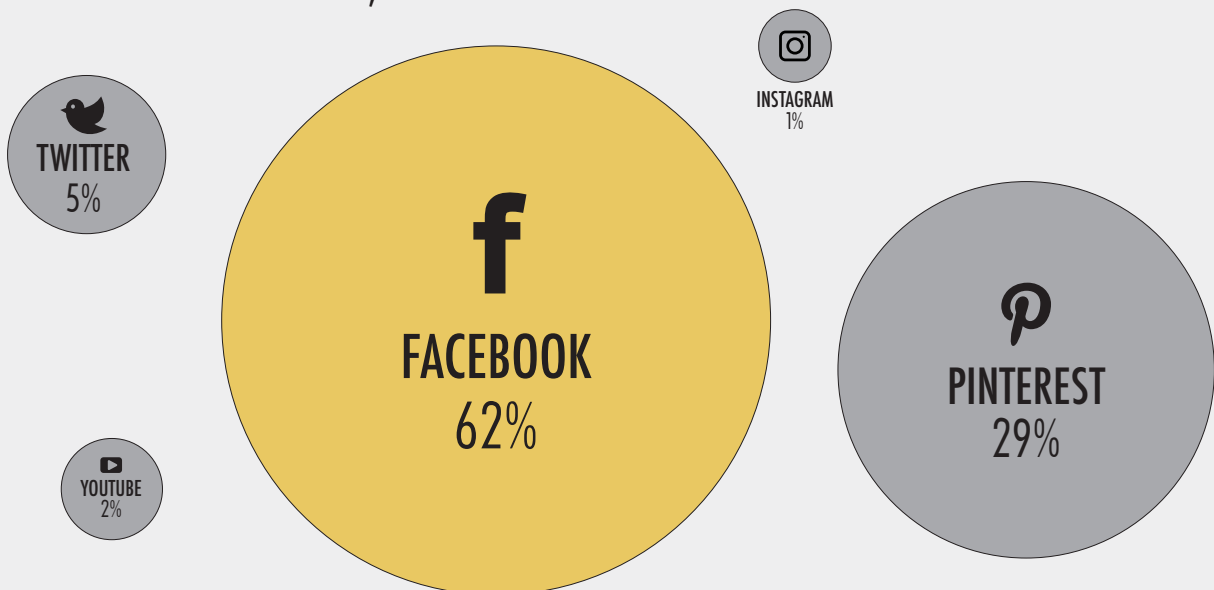
SOURCE: EUROSTAT

## DEVICE USAGE FOR ONLINE IN BELGIUM, 2020



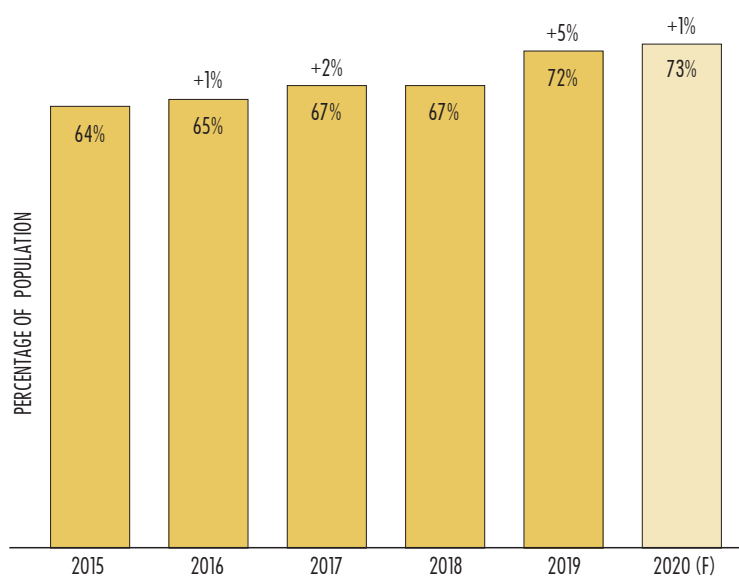
SOURCE: GS.STATCOUNTER.COM (2020)

## SOCIAL MEDIA USAGE IN BELGIUM, 2020



SOURCE: GS.STATCOUNTER.COM (2020)

## ONLINE SHOPPER RATES IN BELGIUM, 2015-2020 (F)



SOURCE: EUROSTAT

## SHARE OF TOTAL GDP MADE UP BY B2C ECOMMERCE TURNOVER

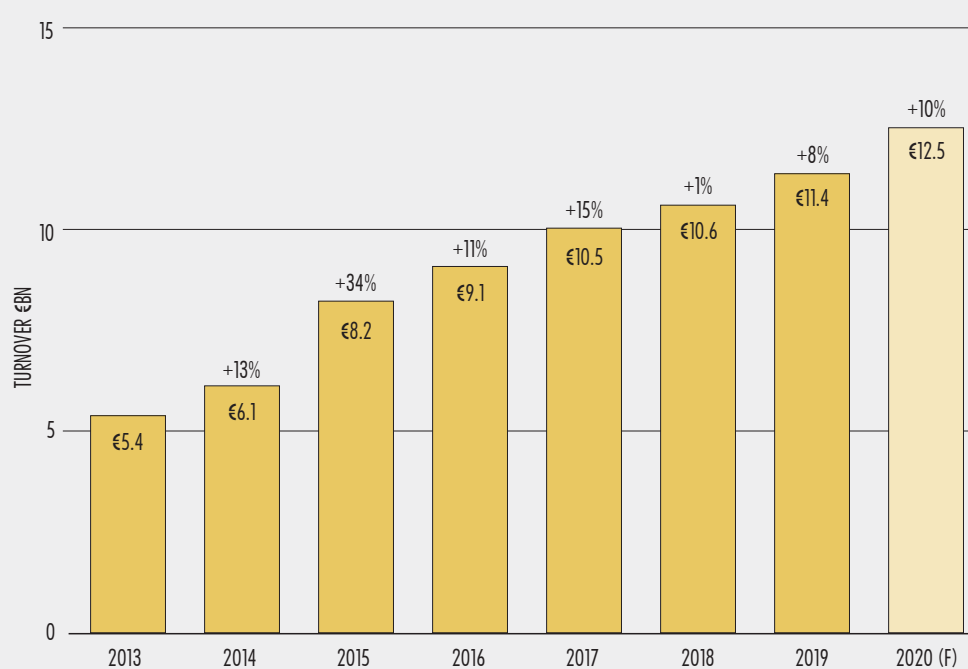
YEAR	E-GDP
2013	1.38%
2014	1.53%
2015	2.00%
2016	2.14%
2017	2.29%
2018	2.35%
2019	2.45%
2020 (F)	2.62%

SOURCES: QUANDL, IMF, NATIONAL ECOMMERCE ASSOCIATIONS, RETAILX ANALYSIS

## B2C ECOMMERCE TURNOVER IN €BN, 2013-2020 (F)

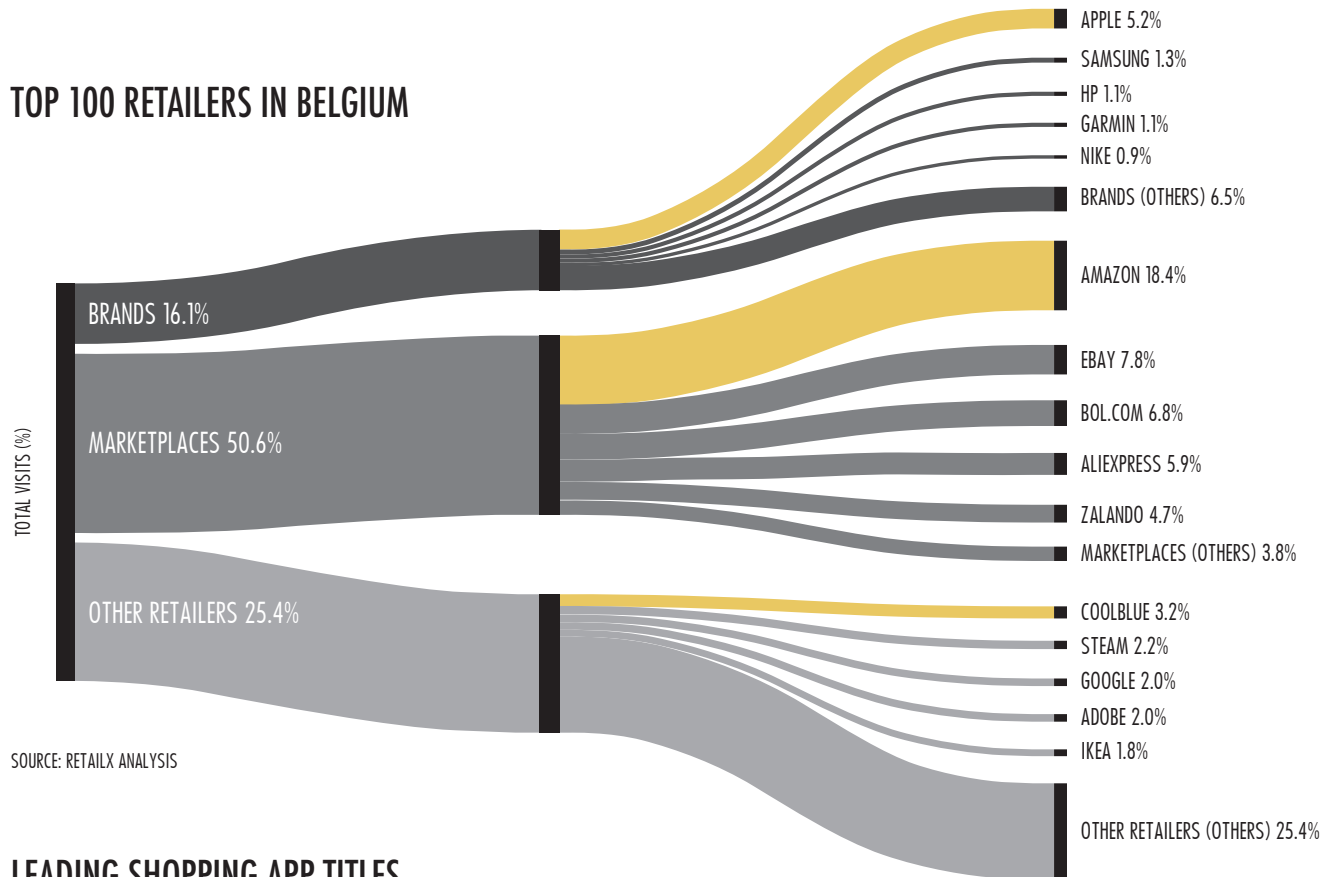
The graph shows the B2C ecommerce turnover in Belgium, including goods and services, in €bn \*

\*BELGIUM: GOODS 11%, SERVICES 66%



SOURCE: BECOMMERCE, RETAILX ANALYSIS

## TOP 100 RETAILERS IN BELGIUM



SOURCE: RETAILX ANALYSIS

## LEADING SHOPPING APP TITLES

Leading shopping app titles in the Apple App Store, by number of downloads in 1,000s, 2019

	XTRA	40.98
	H&M WE LOVE FASHION	26.67
	WISH SHOPPING MADE FUN	22.42
	ZALANDO FASHION AND SHOPPING	17.64
	ALIEXPRESS SHOPPING APP	14.67
	SHEIN FASHION SHOPPING ONLINE	12.38
	STOCARD LOYALTY CARDS WALLET	11.92
	2DEHANDS	10.79
	NIKE	10.45
	AMAZON	9.04

SOURCE: STATISTA, PRIORI DATA (2019)

ONLINE BUYER USAGE BY LANGUAGE		DUTCH	FRENCH
	2015	68%	59%
	2019	78%	80%

## LEADING MOBILE SHOPPING APP TITLES

Leading shopping app titles in the Google Play Store, by revenue, 2019

	WALLAPOP BUY & SELL NEARBY	€2,039
	NADESHIKO APP	€1,703
	MOURJAN	€1,608
	OPENSOOQ	€1,521
	BAZOS	€1,349
	TUTTI.CH FREE CLASSIFIED & SECOND-HAND SHOPPING	€1,331
	QUICKET	€1,231
	BAZARAKI	€1,177
	LANDWIRT.COM TRACTOR & AGRICULTURAL MARKET	€1,059
	OUR GROCERIES SHOPPING LIST	€1,005

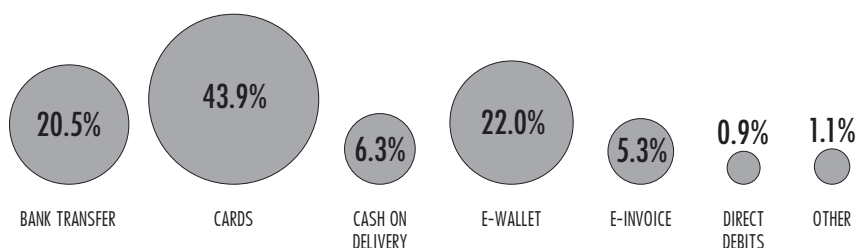
SOURCE: STATISTA, PRIORI DATA (2019)



## POPULAR ONLINE PAYMENT METHODS

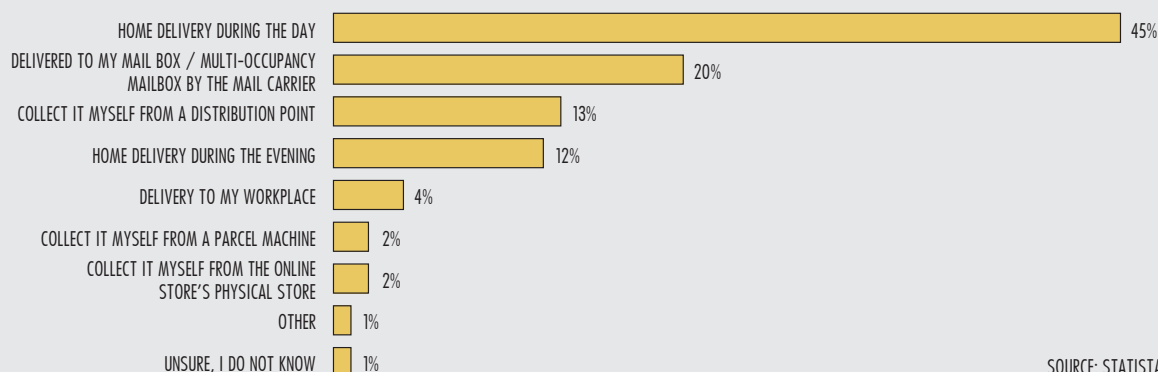
Popular online payment methods in Belgium, 2019

SOURCE: STATISTA (2019)



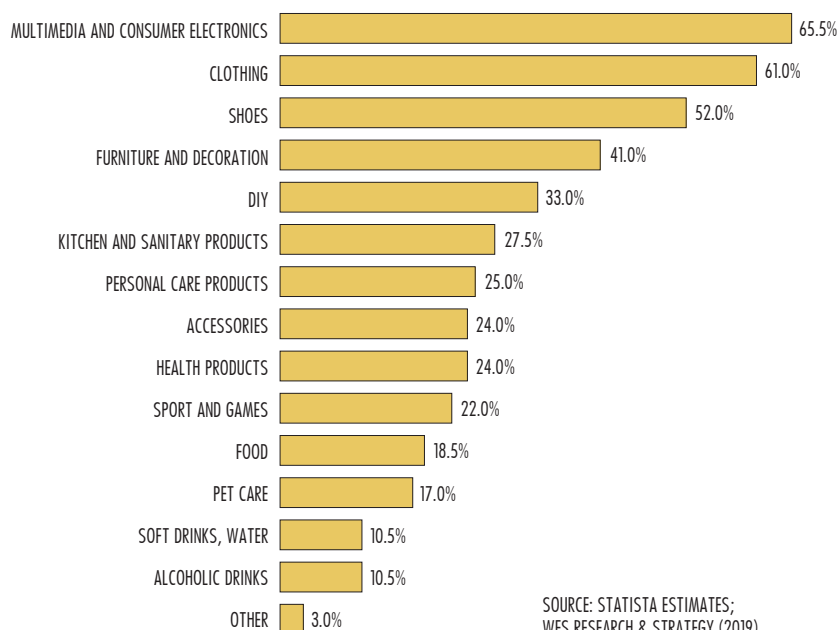
## PREFERRED DELIVERY TYPE WHEN ORDERING ONLINE IN BELGIUM, 2019

When do you order a product online, how do you prefer to have it delivered?



SOURCE: STATISTA, POSTNORD (2019)

## SHARE OF PEOPLE COMPARING PRICES ONLINE BEFORE PURCHASE IN BELGIUM BY PRODUCT, 2019



SOURCE: STATISTA ESTIMATES;  
WES RESEARCH & STRATEGY (2019)

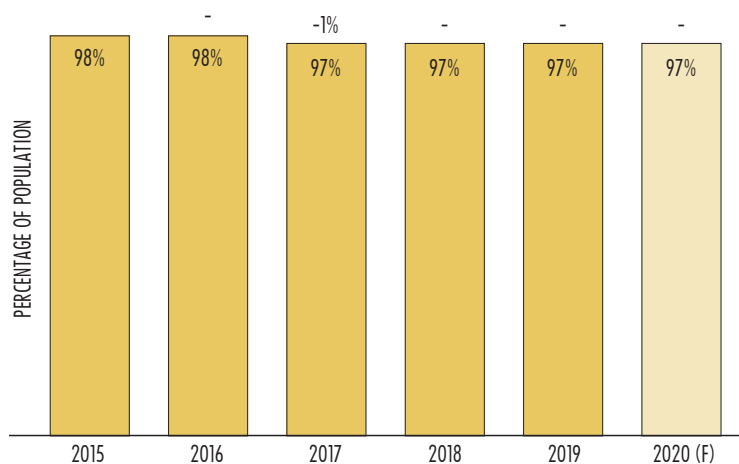
## PERCEIVED BARRIERS WHEN SHOPPING ONLINE IN BELGIUM, 2019



SOURCE: EUROSTAT (2019)

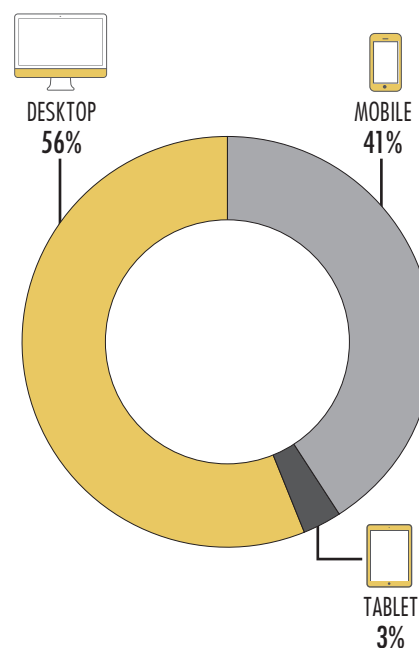
# LUXEMBOURG

## INTERNET USAGE IN LUXEMBOURG, 2015-2020 (FORECAST)



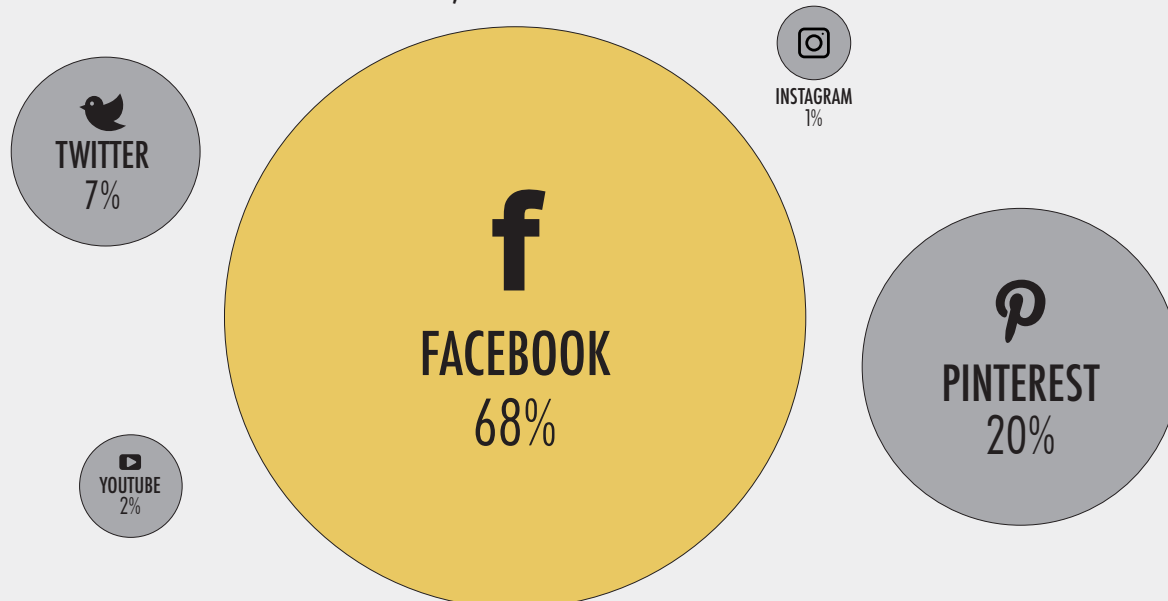
SOURCE: EUROSTAT

## DEVICE USAGE FOR ONLINE IN LUXEMBOURG, 2020



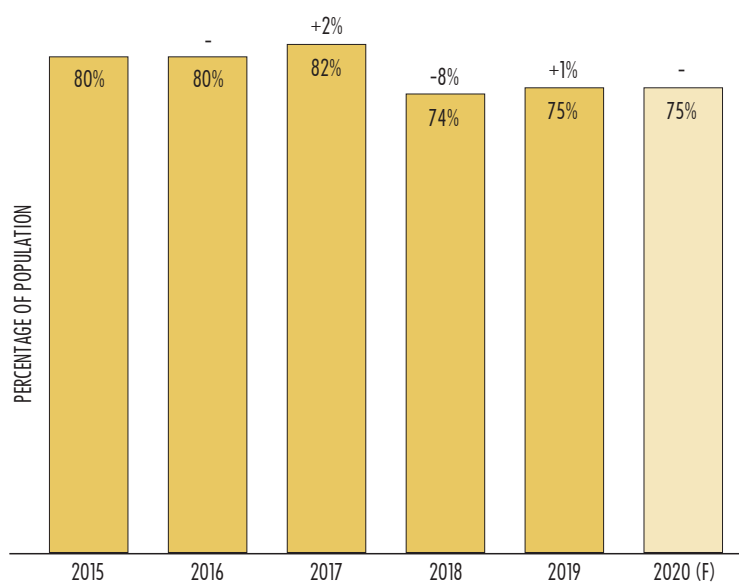
SOURCE: GS.STATCOUNTER.COM (2020)

## SOCIAL MEDIA USAGE IN LUXEMBOURG, 2020



SOURCE: GS.STATCOUNTER.COM (2020)

## ONLINE SHOPPER RATES IN LUXEMBOURG, 2015-2020 (F)



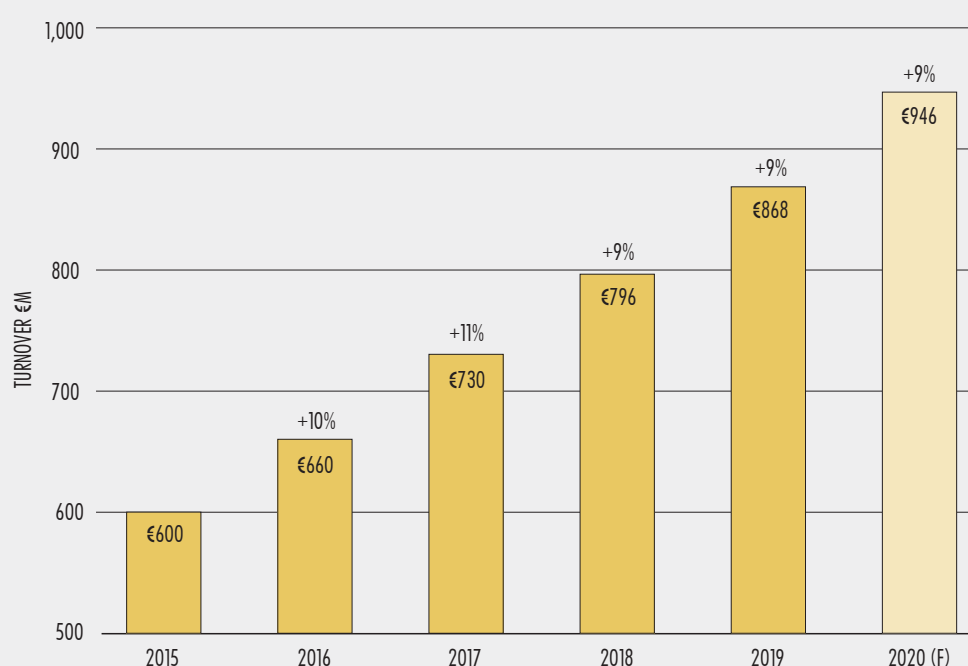
SOURCE: EUROSTAT

## SHARE OF TOTAL GDP MADE UP BY B2C ECOMMERCE TURNOVER

YEAR	E-GDP
2015	1.16%
2016	1.24%
2017	1.32%
2018	1.37%
2019	1.43%
2020(F)	1.49%

SOURCES: QUANDL, IMF, NATIONAL ECOMMERCE ASSOCIATIONS, RETAILX ANALYSIS

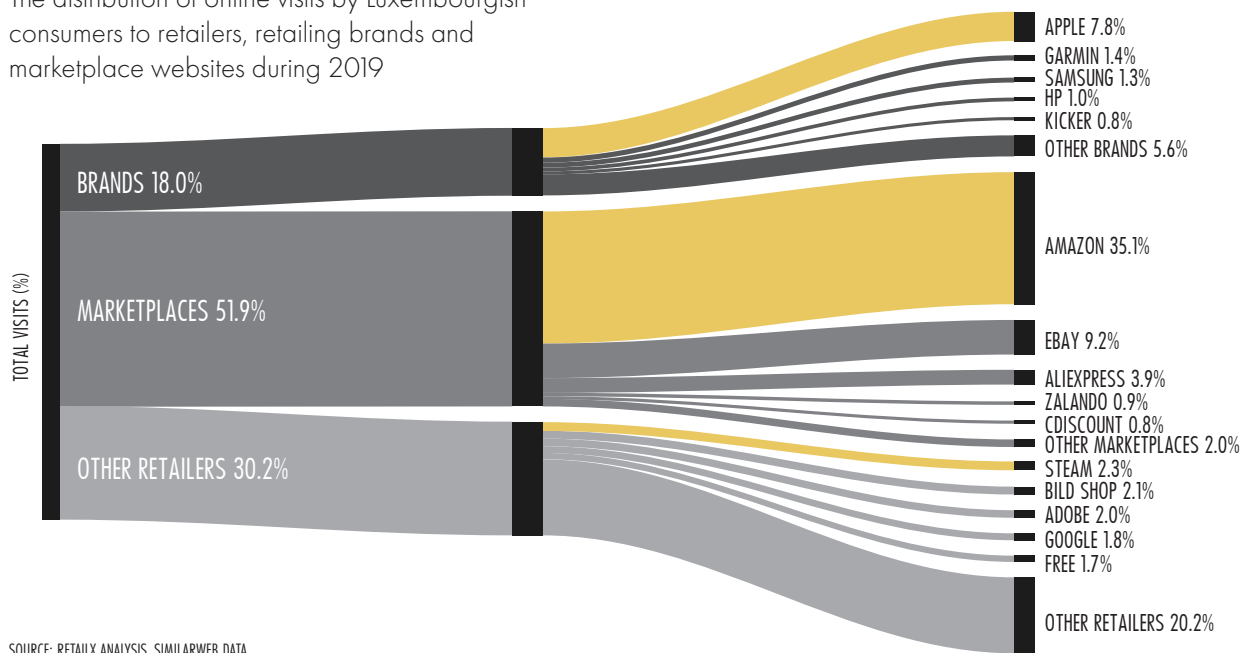
## B2C ECOMMERCE TURNOVER IN €M, 2015-2020 (F)



SOURCE: RETAILX ANALYSIS

## THE TOP 100 RETAILERS WITH THE MOST WEB TRAFFIC FROM LUXEMBOURG

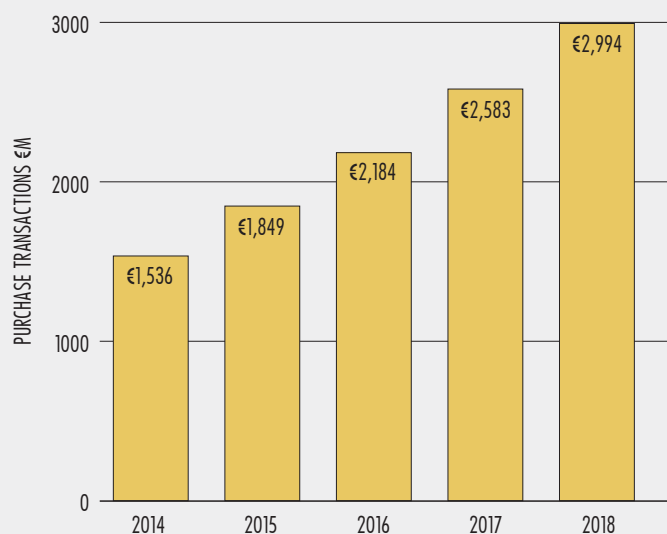
The distribution of online visits by Luxembourgish consumers to retailers, retailing brands and marketplace websites during 2019



SOURCE: RETAILX ANALYSIS, SIMILARWEB DATA

## E-MONEY TRANSACTIONS

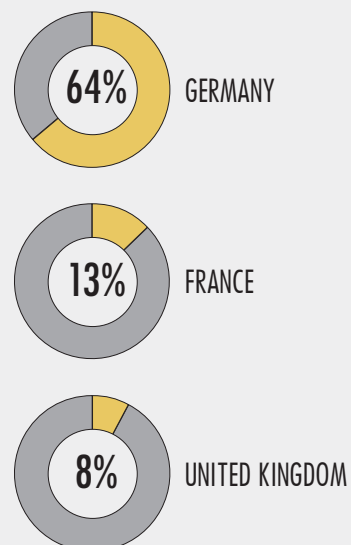
Total number of e-money purchase transactions, in €m, 2014-2018



SOURCE: STATISTA, ECB (2018)

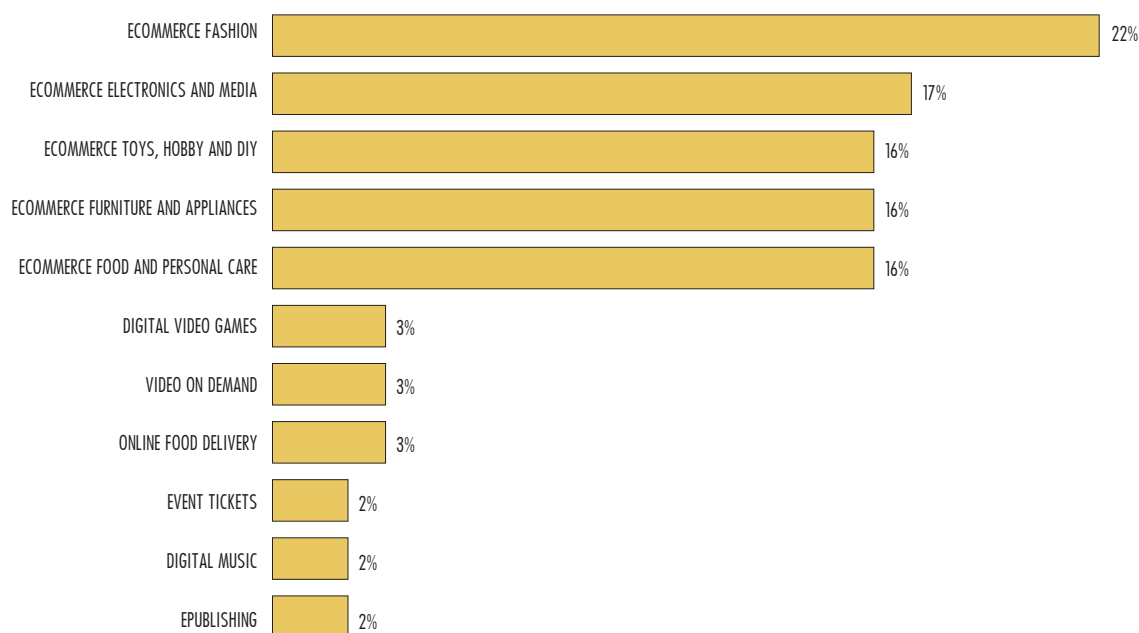
## CROSS-BORDER ECOMMERCE

Countries favoured by consumers in Luxembourg when making cross-border purchases, 2019



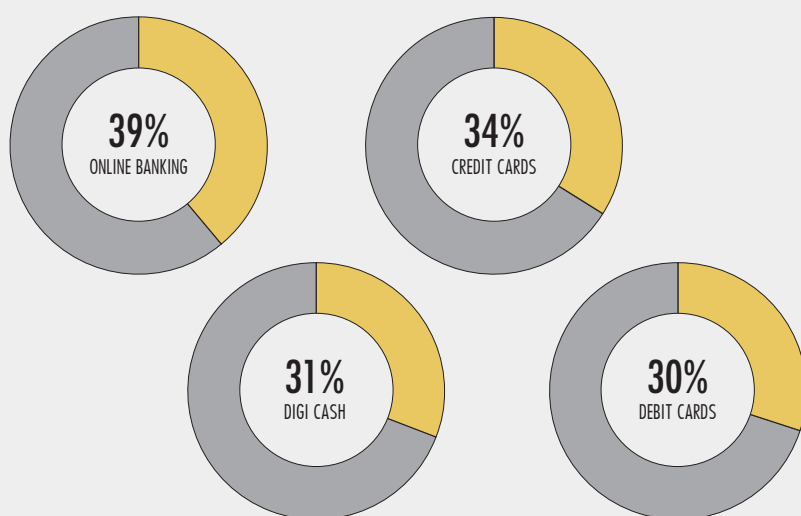
SOURCE: STATISTA, IPC, SURVEY SAMPLING INTERNATIONAL (2019)

## SHARE OF SELECTED DIGITAL MARKETS IN LUXEMBOURG, 2019



SOURCE: STATISTA (2019)

## POPULAR ONLINE PAYMENT METHODS IN LUXEMBOURG, 2019



SOURCE: STATISTA, TNS ILRES (2019)

## PERCEIVED BARRIERS WHEN SHOPPING ONLINE IN LUXEMBOURG, 2019

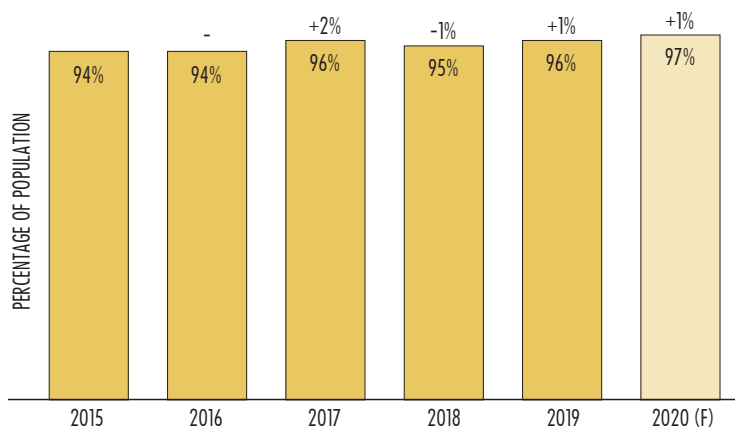


SOURCE: EUROSTAT (2019)



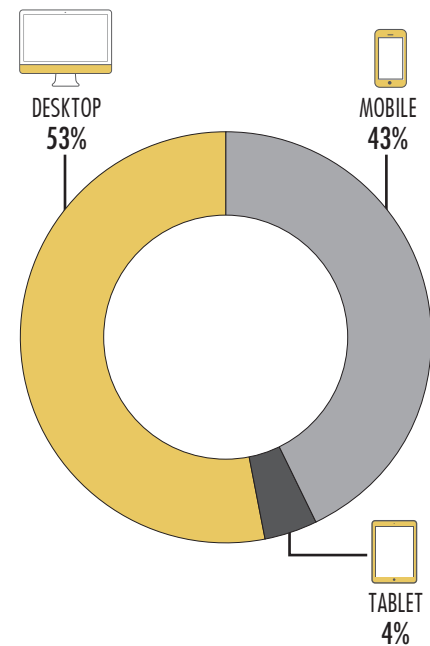
## THE NETHERLANDS

### INTERNET USAGE IN THE NETHERLANDS, 2015-2020 (FORECAST)



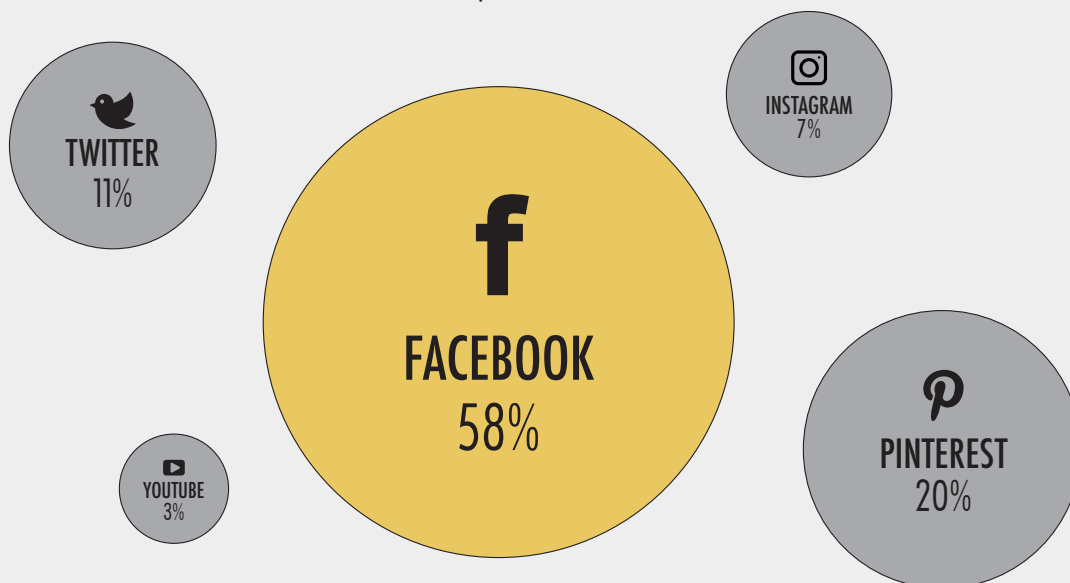
SOURCE: EUROSTAT

### DEVICE USAGE FOR ONLINE IN THE NETHERLANDS, 2020



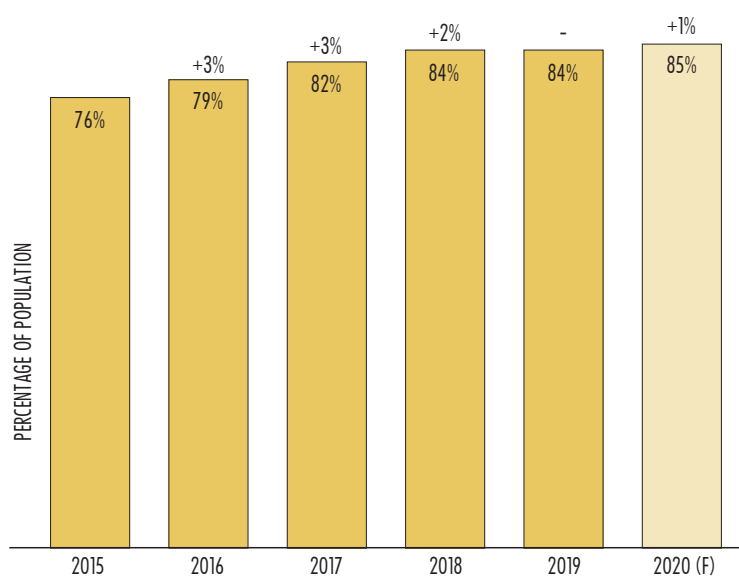
SOURCE: GS.STATCOUNTER.COM (2020)

### SOCIAL MEDIA USAGE IN THE NETHERLANDS, 2020



SOURCE: GS.STATCOUNTER.COM (2020)

## ONLINE SHOPPER RATES IN THE NETHERLANDS, 2015-2020 (F)



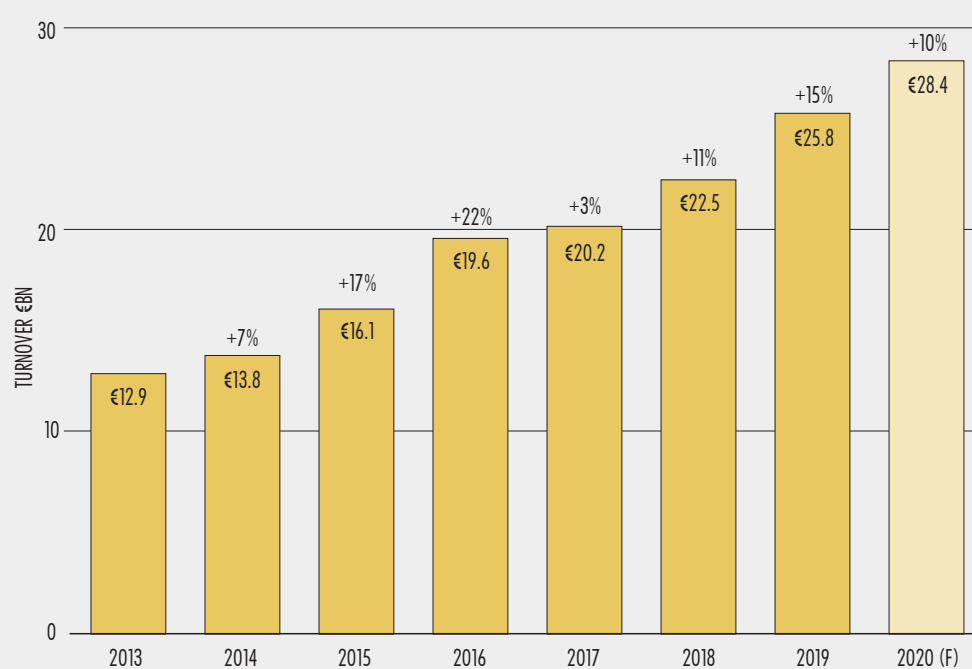
SOURCE: EUROSTAT

## SHARE OF TOTAL GDP MADE UP BY B2C ECOMMERCE TURNOVER

YEAR	E-GDP
2013	1.95%
2014	2.06%
2015	2.33%
2016	2.76%
2017	2.74%
2018	2.91%
2019	3.23%
2020 (F)	3.44%

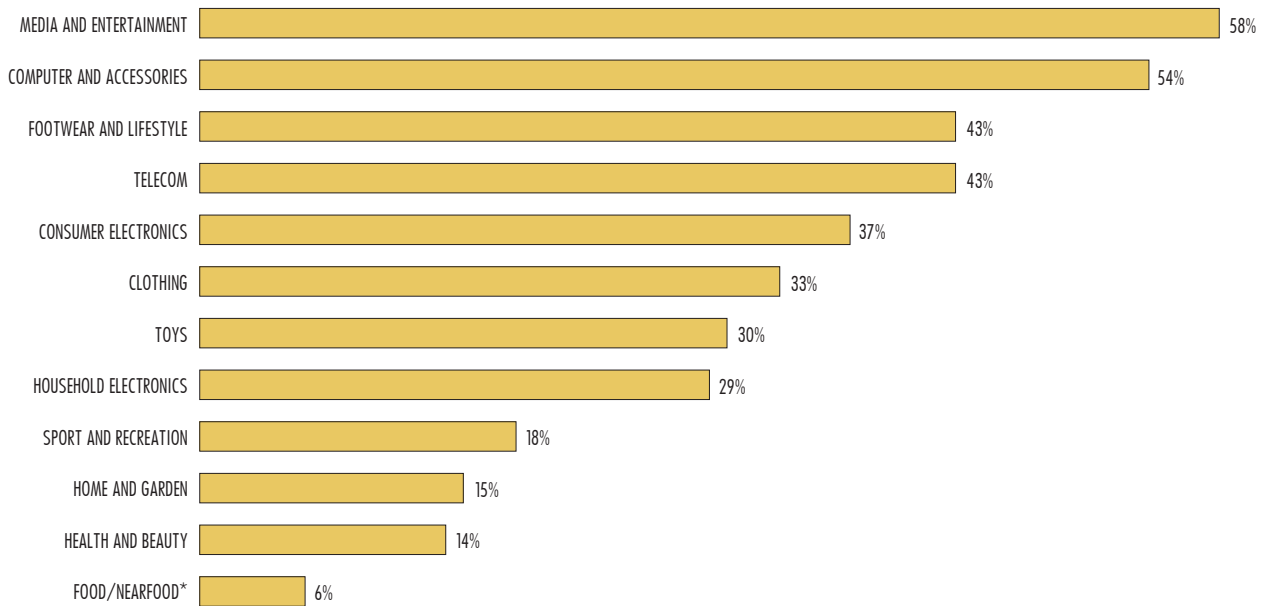
SOURCES: QUANDL, IMF; NATIONAL ECOMMERCE ASSOCIATIONS, RETAILX ANALYSIS

## B2C ECOMMERCE TURNOVER IN €BN, 2013-2020 (F)

THE NETHERLANDS:  
GOODS 57%, SERVICES 43%

SOURCES: THUISWINKEL, RETAILX ANALYSIS

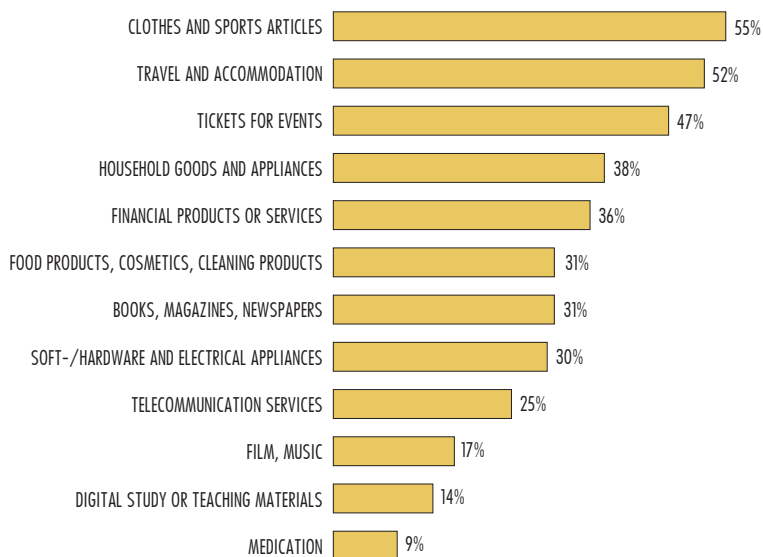
## ECOMMERCE SHARE OF RETAIL SALES IN THE NETHERLANDS, 2019



SOURCE: STATISTA, THUISWINKEL (2019)

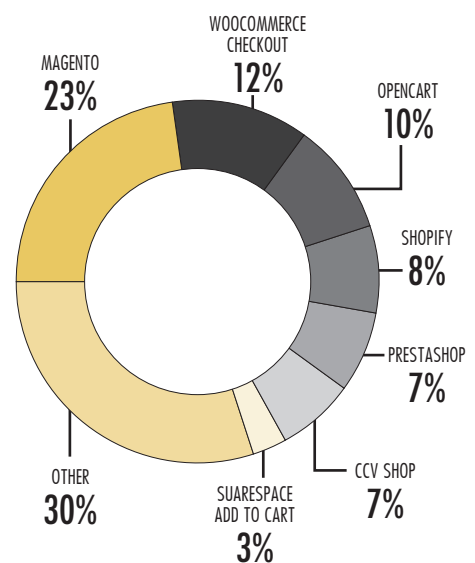
\* NEARFOOD = NON-FOOD GROCERY PRODUCTS, FOR EXAMPLE, BODYCARE PRODUCTS, HOUSEHOLD CLEANING PRODUCTS

## PREFERRED ONLINE PRODUCTS OR SERVICES IN THE NETHERLANDS, 2019



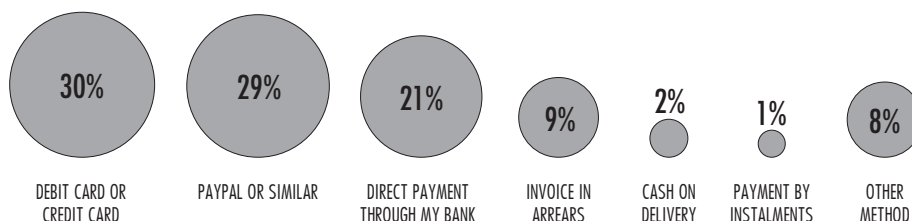
SOURCE: STATISTA, CENTRAAL BUREAU VOOR DE STATISTIEK (2019)

## ECOMMERCE SOFTWARE MARKET SHARE, 2019



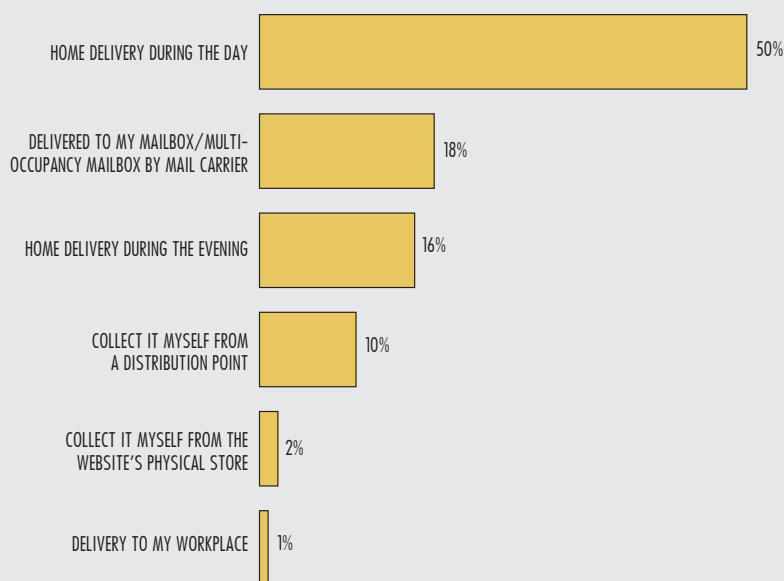
SOURCE: STATISTA, BUILTWITH (2019)

## POPULAR ONLINE PAYMENT METHODS, 2019



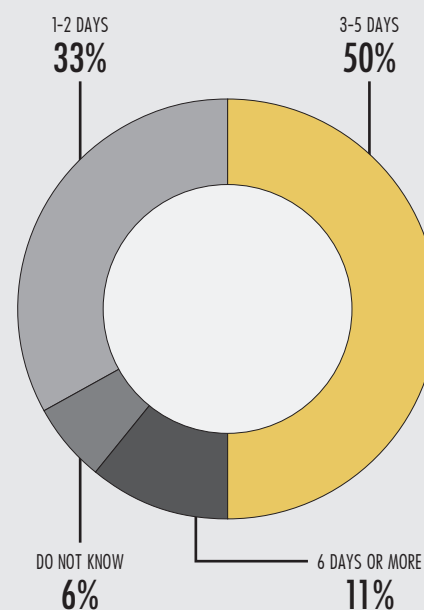
SOURCE: STATISTA, POSTNORD (2019)

## PREFERRED DELIVERY METHODS IN THE NETHERLANDS, 2019



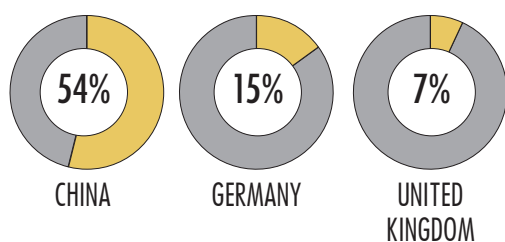
SOURCE: STATISTA, POSTNORD (2019)

## PREFERRED MAXIMUM ECOMMERCE DELIVERY TIME, 2019



SOURCE: STATISTA, POSTNORD (2019)

## LEADING SOURCES OF CROSS-BORDER ECOMMERCE TO THE NETHERLANDS, 2019



SOURCE: STATISTA, IPC, SURVEY SAMPLING INTERNATIONAL (2019)

## PERCEIVED BARRIERS WHEN SHOPPING ONLINE IN THE NETHERLANDS, 2019



SOURCE: EUROSTAT (2019)



## Q&A: STAN DE CALUWE

SENIOR MANAGER,  
SUPPLY CHAIN  
SOLUTIONS, HOLLAND  
INTERNATIONAL  
DISTRIBUTION COUNCIL

The consultant and logistics expert outlines the major issues around fulfilment within European ecommerce

Getting purchases to customers is a key part of the overall retail experience. It follows that investing in scalable and robust logistics infrastructure, or choosing reliable partners, represent board-level decisions. With both Brexit and the expansion of online retail in Eastern and Southern Europe, having the potential to make companies look anew at fulfilment operations, there's plenty to think about. Stan de Caluwe outlines both the issues and possible approaches.

### Have the logistics of certain sectors or retailers been hurt more than others by the effects of the Covid-19 pandemic?

Within the Netherlands, where we have many fulfilment centres that serve a big chunk of the European market, warehousing operations coped quite well. They implemented distancing measures in their warehouses and haven't seen any disruption. Of course, dealing with a continuous peak in online orders – a more than 30-50% increase in online orders for certain products – does pose its challenges, but the distribution centres of both third-party logistics providers (3PLs) and brands have been able to cope. It depends a lot

on the types of product and sales channel, of course. Hybrid centres, serving both B2B and B2C channels, have been able to reallocate resources from their slumping B2B to the booming B2C business. Purely retail distribution centres haven't been so lucky, although shopping streets have since reopened across Europe. The pandemic looks to be a seismic event for online retail, though. Many consumers have been shopping online for the first time and they will stay!

Where distribution centres and 3PLs have been coping, we do get a lot of complaints regarding the last mile and intercontinental shipments. Parcel carriers are stretched and their infrastructures barely hold. The promise of one or two day lead time across most of Europe from the Netherlands is not always met. Consumers have shown some understanding in this unprecedented situation but their patience won't last. That's one reason why we still get a lot of questions about setting up fulfilment operations here, in the middle of western Europe, to be close to the consumer.

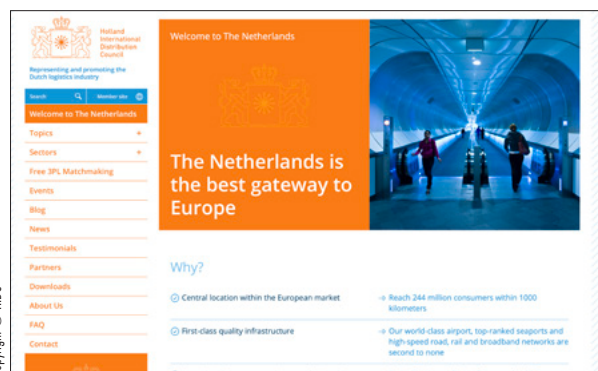
Brands that have been shipping directly to European consumers from their Asia or North America fulfilment centres – a model that's increasingly supported by digital solutions – have suffered from limited capacity on air freight lanes and postal services. Lead times will be even longer and unreliable and costs may increase, which will not be accepted by the European consumer.

### British retailers want to know what they should do about Brexit and how they can continue to sell into Europe.

Brexit has been a very unpredictable process and still, with only a few months to go in the transitional period, a lot is unclear about how seamless trade between UK and EU will be. In the best, but increasingly unlikely, scenario, a deal will be struck and we will know how to handle imports, exports and VAT. Yet even in this positive scenario there will be additional formalities for each shipment and, in the case of B2C, for every individual parcel. As a result, we see the number of UK brands and platforms looking to set up a mainland EU fulfilment centre increasing significantly.

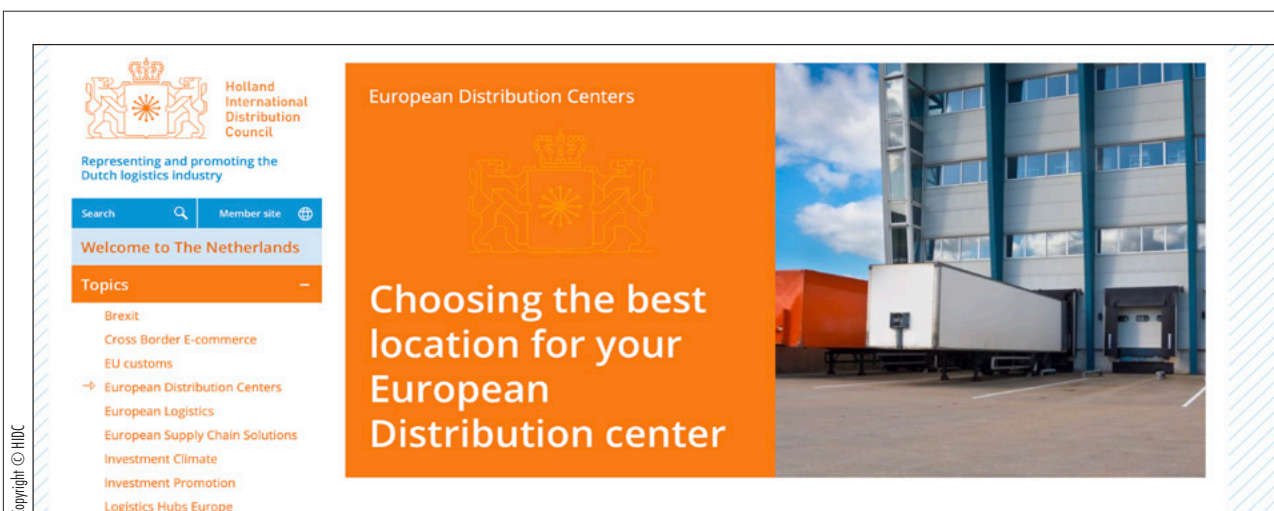
VAT is a massive question for most retailers coming from outside the EU and looking to sell in the EU, but also for inter-EU selling. So what are some important or unique points to bring up about inter-EU cross-border selling and VAT, as well as selling from outside into the EU and VAT?

Well, if an overseas company doesn't know how EU VAT works and they choose the 'trial-and-error' approach, these could be frustrating and costly errors. It is crucial to understand the European 'distance selling' rules when you sell to consumers from a European stock. If you hit certain sales thresholds, for example, €100,000 for Germany, then German VAT should be applied and filed in Germany. The same goes for



HIDC provides free matchmaking services for logistics partners





The Netherlands capitalises on its central location by providing help for businesses looking to relocate to the country

other European countries that all have their own institutions and peculiarities. The upcoming VAT changes, postponed until 1 July 2021, will simplify VAT in the EU by offering a one-stop-shop for VAT, letting you do your filings in one country. Brands and retailers should anticipate this change and be informed.

#### **What can SMEs learn from the Netherlands, especially relating to current trade arrangements and logistics for the Netherlands, both from outside and inside the EU?**

European importers and overseas exporters can both benefit from the favourable business climate in the Netherlands. The country includes Europe's largest port and best-connected airport, as well as the most business-friendly VAT environment in Europe, which is highly digitised and streamlined. For example, it is fairly straightforward to defer import VAT payments, meaning that you don't need to pay VAT upon import and then reclaim it. You can even do this without having an establishment in the Netherlands by making use of a fiscal representative. These low-barrier ways of streamlining supply chains and cash flows have proven to be very attractive for overseas companies.

#### **What are your main tips for SME retailers that are looking to sell online in mainland Europe?**

Europeans want their products within one or two days, so shipping from North America directly to consumers won't work. A fulfilment centre makes sense. A centre in the Netherlands would situate you between the three biggest ecommerce markets – Germany, France and the UK. If you want to build up stock in Europe, being in one centre makes sense and having stock in a central location is best. You can outsource the warehousing and fulfilment, even when your

volumes are still low. There is a wide variety of third-party fulfilment providers and it can be a challenge to find the right one based on your product, volume, sales channels and destination markets.

North American and British retailers and brands should also know that most Dutch people speak English. In fact, the Netherlands is the number-one English-speaking country in the world after native English-speaking countries such as the US and the UK, so nothing will get lost in translation.

#### **The other big question on everyone's mind: Amazon – is this the only solution for SMEs that are looking to sell into Europe?**

It's a great way to test the waters but relying on Amazon can be a risk further down the line. It is advisable to stay in control by owning the market data and intelligence that you gather selling online and fulfilling orders. There are many more platforms and online retailers that vary by country and may work better for you. Selling from your own webshop gives you total control and market info. The good thing with having a third-party fulfilment partner is that they can service all B2B and B2C sales channels (including Amazon) and give you a solution for returns. ■



Holland International Distribution Council (HIDC) – Dutch: Nederland Distributieland (NDL) – is a private, non-profit organisation providing free matchmaking services for logistics partnerships in Europe  
[hollandinternationaldistributioncouncil.com](http://hollandinternationaldistributioncouncil.com)



**Q&A:**  
**ERIK ANKONÉ**

**CREATIVE AND  
ACCOUNT DIRECTOR,  
REVOLTE STUDIO**

The branding and communications studio's co-founder offers a creative's perspective on engaging customers who may have a very different culture to those in a retailer's home territory

For companies wanting to enter the European market, the opportunities are out there. However, doing so involves navigating a variety of issues, not least communicating brand values to customers who may be unfamiliar with, or even suspicious of, a retailer. Erik Ankoné offers a creative's perspective on engaging customers in countries that may have a very different culture to a retailer's home territory.

**What tips you would give retailers from outside Europe looking to expand into the European ecommerce market?**

Keep in mind that Europe is far from a homogeneous market. There are many significant cultural differences, from the way

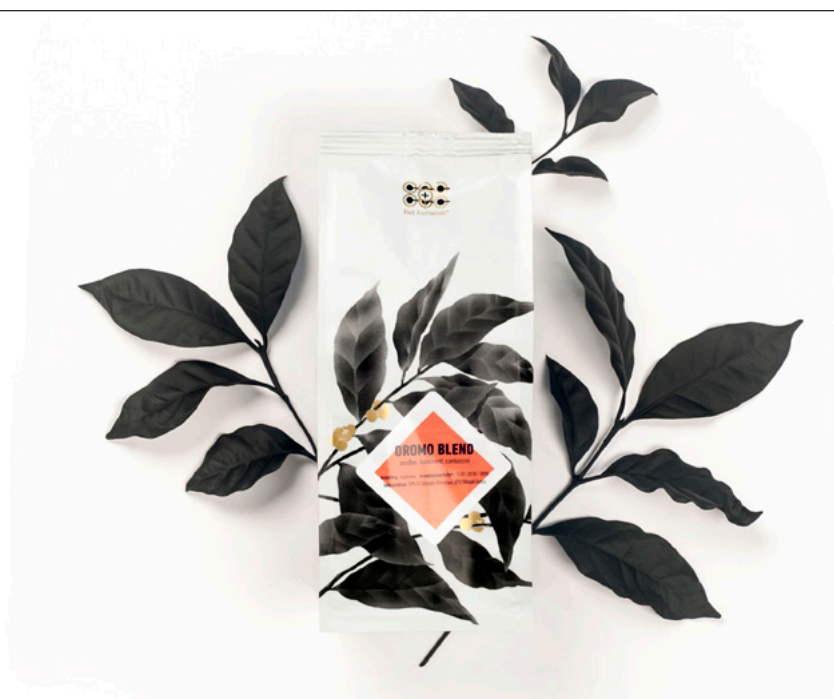
we congratulate someone's birthday to the way we build houses! Differences exist even within countries, so if you're going to run ad campaigns, don't be afraid to team up with local agencies to get extra help. They will know how to engage your target audience.

**Why is an understanding of brand identity and strategy important to a retailer wanting to engage in Europe?**

A strong brand identity is especially important if you exist solely online because your customers must get to know, like and trust you. Everything your brand does, says and portrays needs to fit the same narrative, otherwise customers won't know who they're dealing with. It's more difficult to create that trust without an in-store employee stepping in to explain.

With regards to opening up in Europe, unless you're bringing a unique product to the market, we probably already have what you're offering, especially in Western Europe. So focus on the story. Why is your approach or background different? Why is this difference important?

I think a lot of companies don't think about branding that much because they're happy and married to their logo and corporate identity. They may also have a good company culture but that is only inward – you have to convey that message outward too. Audit yourself. Do you still live by your core values? Do your customers experience



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Revolte Studio has undertaken package design and photography for online coffee retailer Het Koffielab



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Revolve's custom-branded energy drinks for visual artist ANK1

your brand the same way you do? If not, something may need changing.

**Where would you suggest that retailers entering the European market should allocate their budgets?**

It would be suspicious if I suggested investing in branding but I'll say this: know who you are as a company, how you talk, how you look, how you write, how you engage. Focus inwards before you step out, then adapt – it will make it easier to branch out beyond your borders. For smaller companies, it's hard to calculate ROI on branding, although big brands also started small. A good brand strategy plus the will to stick to it will get you there.

**Any extra tips for SMEs looking towards Europe?**

Know your target audience so that you can strategise your approach, your campaign look and your messaging. Branding is really just trying to shape an entity that your target audience would love to interact with. A company shows its face through every single point of contact with its customers. Understanding your target audience will help you understand how to behave as a brand.

You see a lot of brands jumping on the sustainability bandwagon but if it's not part of your DNA, then don't. If it

is, then sure, lean into it. Don't overdo it though – that might interfere with some of the other things that customers love about your brand.

If you're catering to a certain market, either research the language and cultural differences, or have a strategy team on the ground make recommendations. Choose between British or American English, for example, then stick with it.

Finally, branding is more than graphic design and copywriting – it's building a company that everyone believes in. If you really know what your brand stands for, company operations will move more quickly and efficiently. Living your brand makes selling your products so much easier, so get your house in order before you go across the border! ■

**REVOLTE**  
a branding and communication studio

Revolve Studio is a branding and communication studio based in Amsterdam. Through thorough analysis, strong design and clear communication, the company creates brand identities.

[www.revolvestudio.com](http://www.revolvestudio.com)

## WHEN AMAZON GOES TO MARKET

The European marketplace ecosystem is complex, with customers in different countries favouring the shopping portal that suits local needs. So what happens when Amazon launches in a territory, as it did in the Netherlands in March 2020? We look at whether its launch has already changed the Benelux region

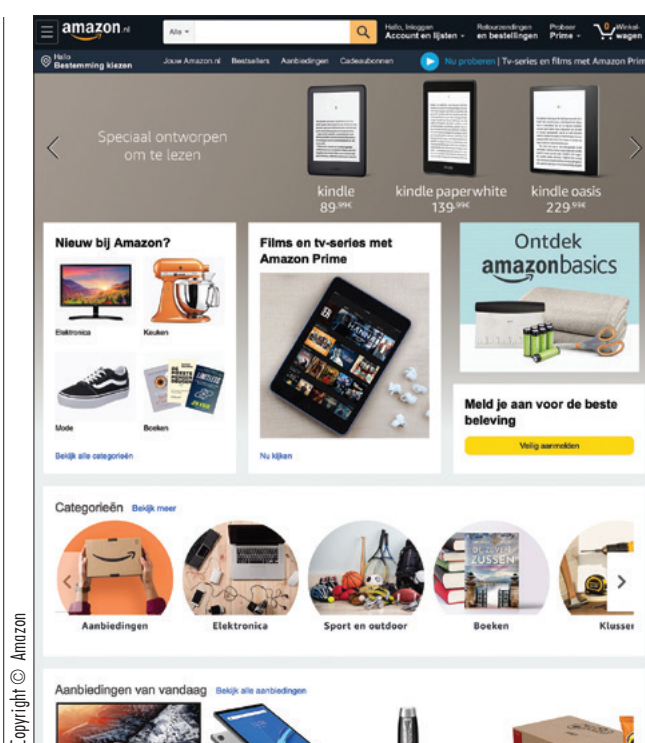
With revenues of \$280.5bn in 2019, Amazon is the world's largest online marketplace. So when Amazon launches a country-specific website, it follows that it has a huge impact on ecommerce in the region – which begins even before Amazon starts up its operations.

This was the case in the Netherlands when, in October 2019, it first became clear that amazon.nl was going to become a fully fledged, country-specific marketplace rather than just a destination for the purchase of ebooks and Kindles. "We're convinced that we can win the trust of the Dutch consumer with a wide product range, competitive prices and fast and reliable delivery," noted Roeland Donker, country manager Benelux for Amazon, in January 2020 as the company opened its platform to external vendors.

From the perspective of the UK or USA, countries where Amazon enjoys a dominant market position, it is easy to assume the company will soon enjoy a similar status in the Netherlands. But that stance overlooks the fierce competition that exists even for an innovative and aggressive company such as Amazon when it enters a new market. In great part, that's because these days, all territories are already served by marketplaces that have strongly localised offerings.

### MARKET LEADER

In the case of the Netherlands, the leading marketplace has long been bol.com, a company with an early history that, curiously, involves Amazon. In 1999, Bertelsmen Group, the German company behind the online pioneer Books Online, which became bol.com, held talks with Jeff Bezos over launching as Amazon Europe. Bezos rejected the idea. Instead, by 2009, bol.com was winning awards as the best webshop in the



Amazon.nl is using localised pricing to increase market share

Netherlands. In 2011, bol.com opened its platform to third-party sellers. By 2014, it had five million customers.

In 2018, bol.com's ecommerce net sales in the Netherlands were US\$1.41bn. By contrast, amazon.com's sales in the same year in the Netherlands were \$199.6m, an impressive figure but eighth overall in the country as a whole and still far behind the marketplace ranked second, Coolblue, which had net sales of \$1.11bn.

With the launch of amazon.nl approaching, bol.com moved to protect its place at the apex of the Dutch ecommerce market. Among its initiatives was a marketing campaign that focused for the first time on its selling partners – the retailers already using the platform. This followed bol.com launching a fashion category on its website in January, just a week after amazon.nl had announced that it was opening its doors to third-party sellers.

"Many customers were already searching for women's and men's fashion," noted Margaret Verstedden, bol.com's chief commercial officer. "That's why it makes sense to add this product range and make our assortment more complete than ever." At

the time, Verstedden denied that the move was a direct response to Amazon, saying it had been an initiative the company had been working on "for years". Maybe so, although the timing was, at the very least, fortuitous. The company also reduced its commission fees in some product categories.

## AMAZON'S DUTCH OFFER

From Amazon's side too, there was a strong sense of a company prepared to fight for market share. Amazon Prime, with its free deliveries and access to films and games to stream, was launched at a price of just €2.99 for Dutch customers, compared to £7.99 a month on the UK and \$12.99 in the USA.

Omnia, which specialises in dynamic pricing, analysed the effect of amazon.nl on the Dutch market on the day of its launch by looking at the top 10,000 products (according to popularity) in the electronics category. As well as amazon.nl, it analysed bol.com, Coolblue, Mediamarkt and Wehkamp. It looked at assortment size (measured by the number of EANs offered), price (measured by price comparison) and strategy. Its research also encompassed amazon.de.

Among its key findings were that Amazon in the Netherlands is pursuing a localised pricing strategy. Of 3,852 shared EANs across the entire market, Amazon offered a lower price on 2,416 (64%) of these products. The price difference was often small – on average, 3% lower than bol.com's prices – but significant nonetheless. It found further evidence of a localised price strategy by comparing products offered on amazon.nl and amazon.de.

Omnia also found evidence that Amazon was running a high-runner strategy, offering heavy discounts on key products such as Sony headphones to increase traffic, then cross-selling and upselling on higher margin goods after tempting consumers in. In response, bol.com also dropped its headphone price, which suggests one major way Amazon will affect the Dutch market. Since Amazon competes so aggressively on price, it will force other retailers to react, leading to more dynamic and competitive pricing.

## BEYOND BORDERS

The influence of amazon.nl will not just be confined to the Netherlands. That's partly because the Benelux area as a whole is one of different nationalities and languages. In the north of Belgium, for example, bol.com has long prospered by selling goods to Dutch-speaking consumers. Conversely, bol.com has long been eyeing Amazon's share of French-speaking customers

in Belgium, many of whom use Amazon's French site, which launched in 2000. In August 2020, bol.com launched a French version of its app.

"We choose to launch only as an app today, because research says that an increasing number of people do their online shopping on a mobile device," noted bol.com's Margaret Verstedden. The company claims that thousands of Belgian entrepreneurs have begun to use its marketplace. It plans to expand its click and collect scheme to 300 Delhaize supermarkets, including 58 in the French-speaking part of Belgium.

How all these different initiatives will shake down will become clearer with time but step back from the details of two big companies going toe to toe and the bigger picture is that marketplaces are becoming a key part of every regional market. When RetailX recently assessed European retail operations that appeared to have the attributes of marketplaces – either by behaving as pure marketplaces or because they were retailers offering marketplace-like features – the figures were striking.

In the Netherlands, 60% of retailers are either marketplaces or look like marketplaces, a figure that rises to 73% for Belgium. Looking at these figures, all retailers need to understand the dynamic influence of marketplaces when considering whether to expand into new markets, or indeed when choosing which marketplaces with which to partner. ■



The first RetailX European Marketplaces report lists and examines the major marketplaces and marketplace-like retail sites across Europe and analyses what the marketplace market in Europe looks like, as well as how each performs.

Assessing the mixture of pure and mixed marketplaces in each country, the report delves into the customer experience in each. It goes on to examine the merchant experience for sellers by looking at payments, subscriptions, logistics, consumer protection, brand protection and more.

The report takes a look at the growing role of non-transactional marketplaces, as well as those servicing the B2B space. Assessing five key marketplaces, the report also outlines the trends shaping the European marketplace landscape.

Download the report at: <https://retailx.net/product/european-marketplaces-report-2020/>



## THE LANGUAGE OF COMMERCE

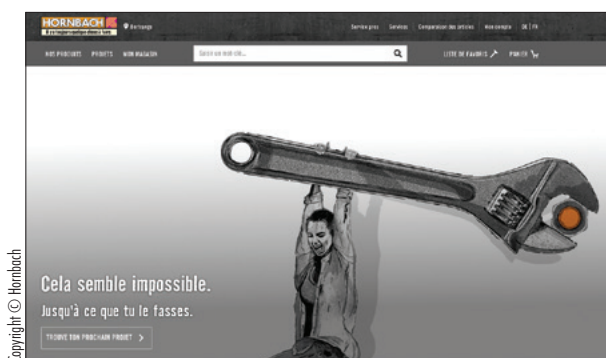
Dutch, French, German and Luxembourgish are all official languages in Benelux, although which one is used where and in what situation depends on the country and region in which the interaction is taking place.

Dutch is spoken in the Netherlands, which is the largest ecommerce markets in Benelux, with the Dutch also priding themselves on being the country where the most people speak English as a second or third language. 90% of adults there understand English, with 71% speaking German.

Luxembourg has three official languages: Luxembourgish, French and German. The majority of the population of the small country are multilingual, with the language they use being dependent on the context. A law passed in 1984 made the standing of all three languages equal for administration purposes, with government officials having to respond to members of the public in the language in which they have been addressed. However, in practice, French remains the dominant language for legislative documents, with German being widely used in print media.

The main ecommerce sites with the .lu suffix – DIY site Hornbach, consumer electronics and white goods retailer hifi and fashion retailer Next – operate in French, while the site of German-owned consumer electronics brand alternative.lu operates in German.

Between the Netherlands and Luxembourg lies Belgium. Roman Emperor Charlemagne split the area into three while dividing up his empire for his grandchildren in 843AD and the ripples of this ancient decision are still felt today. Dutch, French and German are Belgium's official languages, yet



Choosing the appropriate language is vital for targeted selling

consumer preferences for each language are based on geography and historical border changes within the country.

Flemish (or Belgium-Dutch) is spoken in the northern part of the country, where the majority of the population lives. French is preferred in the southern region of Wallonia. The capital city of Brussels is the exception. The city is officially multilingual, with transport, advertising and street signs in both Flemish and French. Yet despite it being located within the Flemish area of the country, it is French that is widely used in everyday life since this is the language used for higher education and business.

International brands and retailers wanting to market to consumers in the different countries that make up the Benelux region need to understand this multitude of languages, since the best experience and authenticity for consumers can only be delivered through careful targeting. Whichever language and domain are chosen for ecommerce sites, the multilingual consumers are likely to choose the language they are most comfortable with when it comes to search. This is a point that needs to be addressed if retailers and brands want to be found. ■



French dominates in Brussels, despite the city being in the Flemish-speaking part of the country





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# BENELUX REPORT DATA SOURCES

To supplement our own research in our analysis for the Benelux 2020 Ecommerce Country Report, we drew on these sources. While each one is referenced next to the chart or graphic they are used in, for transparency, here are all the links:

## Market overview

**TOTAL POPULATION:** [www.worldometers.info/](http://www.worldometers.info/)

**TOTAL GDP:** [www.quandl.com/](http://www.quandl.com/)

**LOGISTIC PERFORMANCE INDEX:** <https://lpi.worldbank.org/>

**EASE OF DOING BUSINESS:** [www.doingbusiness.org/en/rankings](http://www.doingbusiness.org/en/rankings)

**E-GOVERNMENT DEVELOPMENT INDEX:** [www.un.org/development/desa/publications/2018-un-e-government-survey.html](http://www.un.org/development/desa/publications/2018-un-e-government-survey.html)

## Ecommerce overview

**INTERNET USAGE:** <https://ec.europa.eu/eurostat/data/database>

**ONLINE SHOPPERS:** <https://ec.europa.eu/eurostat/data/database>

**INTERNET INCLUSIVITY INDEX:** <https://theinclusiveinternet.eiu.com/>

**B2C ECOMMERCE TURNOVER:** [www.becommerce.be/en\\_US/](http://www.becommerce.be/en_US/)  
[www.thuiswinkel.org/](http://www.thuiswinkel.org/)  
[www.statista.com/statistics/684215/e-commerce-turnover-in-luxembourg/](http://www.statista.com/statistics/684215/e-commerce-turnover-in-luxembourg/)

**FREQUENCY OF ONLINE PURCHASES:** <https://ec.europa.eu/eurostat/data/database>

**ONLINE PURCHASES NATIONALLY AND CROSS-BORDER:** <https://ec.europa.eu/eurostat/data/database>

**SECURITY CONCERNS:** <https://ec.europa.eu/eurostat/data/database>

## Belgium

**INTERNET USAGE:** <https://ec.europa.eu/eurostat/data/database>

**DEVICE USAGE FOR ONLINE:** <https://gs.statcounter.com/platform-market-share/desktop-mobile-tablet/belgium>

**SOCIAL MEDIA USAGE:** <https://gs.statcounter.com/social-media-stats/all/belgium>

**ONLINE SHOPPERS:** <https://ec.europa.eu/eurostat/data/database>

**B2C ECOMMERCE TURNOVER:** [www.becommerce.be/en\\_US/](http://www.becommerce.be/en_US/)

**LEADING SHOPPING APP (APPLE STORE):** [www.statista.com/statistics/698599/top-iphone-shopping-apps-in-belgium-by-number-of-downloads/](http://www.statista.com/statistics/698599/top-iphone-shopping-apps-in-belgium-by-number-of-downloads/)

**LEADING SHOPPING APP (GOOGLE PLAY STORE):** [www.statista.com/statistics/691257/leading-shopping-apps-in-google-play-in-belgium-by-revenue/](http://www.statista.com/statistics/691257/leading-shopping-apps-in-google-play-in-belgium-by-revenue/)

**POPULAR ONLINE PAYMENT METHODS:** [www.statista.com/outlook/243/129/ecommerce/belgium#market-globalRevenue](http://www.statista.com/outlook/243/129/ecommerce/belgium#market-globalRevenue)

**PREFERRED DELIVERY TYPE:** [www.statista.com/statistics/877903/online-purchase-time-in-belgium/](http://www.statista.com/statistics/877903/online-purchase-time-in-belgium/)

**INTERNET ACTIVITY:** [www.statista.com/statistics/993211/share-of-people-comparing-prices-online-in-belgium-by-product-category/](http://www.statista.com/statistics/993211/share-of-people-comparing-prices-online-in-belgium-by-product-category/)

**PERCEIVED BARRIERS:** <https://ec.europa.eu/eurostat/data/database>

## Luxembourg

**INTERNET USAGE:** <https://ec.europa.eu/eurostat/data/database>

**DEVICE USAGE FOR ONLINE:** <https://gs.statcounter.com/platform-market-share/desktop-mobile-tablet/luxembourg>

**SOCIAL MEDIA USAGE:** <https://gs.statcounter.com/social-media-stats/all/luxembourg>

**ONLINE SHOPPERS:** <https://ec.europa.eu/eurostat/data/database>

**SHARE OF SELECTED DIGITAL MARKETS:** [www.statista.com/outlook/994/257/digital-economy/luxembourg?currency=eur](http://www.statista.com/outlook/994/257/digital-economy/luxembourg?currency=eur)

**E-MONEY TRANSACTION:** [www.statista.com/statistics/443515/electronic-money-payment-in-luxembourg/](http://www.statista.com/statistics/443515/electronic-money-payment-in-luxembourg/)

**CROSS-BORDER ECOMMERCE:** [www.statista.com/statistics/875201/leading-countries-for-cross-border-e-commerce-purchases-from-luxembourg/](http://www.statista.com/statistics/875201/leading-countries-for-cross-border-e-commerce-purchases-from-luxembourg/)

**PERCEIVED BARRIERS:** <https://ec.europa.eu/eurostat/data/database>

## The Netherlands

**INTERNET USAGE:** <https://ec.europa.eu/eurostat/data/database>

**DEVICE USAGE FOR ONLINE:** <https://gs.statcounter.com/platform-market-share/desktop-mobile-tablet/netherlands>

**SOCIAL MEDIA USAGE:** <https://gs.statcounter.com/social-media-stats/all/netherlands>

**ONLINE SHOPPERS:** <https://ec.europa.eu/eurostat/data/database>

**B2C ECOMMERCE TURNOVER:** [www.thuiswinkel.org/](http://www.thuiswinkel.org/)

**ECOMMERCE RETAILERS:** [www.statista.com/statistics/792475/e-commerce-share-of-retail-sales-in-the-netherlands-by-product-category/](http://www.statista.com/statistics/792475/e-commerce-share-of-retail-sales-in-the-netherlands-by-product-category/)

**PREFERRED PRODUCTS:** [www.statista.com/statistics/561287/share-of-individuals-shopping-online-in-the-netherlands-by-type-of-purchase/](http://www.statista.com/statistics/561287/share-of-individuals-shopping-online-in-the-netherlands-by-type-of-purchase/)

**ECOMMERCE SOFTWARE:** [www.statista.com/statistics/1053195/e-commerce-software-market-share-in-the-netherlands/](http://www.statista.com/statistics/1053195/e-commerce-software-market-share-in-the-netherlands/)

**POPULAR ONLINE PAYMENT METHODS:** [www.statista.com/statistics/672216/ranking-of-preferred-payments-methods-in-the-netherlands/](http://www.statista.com/statistics/672216/ranking-of-preferred-payments-methods-in-the-netherlands/)

**PREFERRED DELIVERY METHODS:** [www.statista.com/statistics/672219/preferred-delivery-type-when-ordering-online-in-the-netherlands/](http://www.statista.com/statistics/672219/preferred-delivery-type-when-ordering-online-in-the-netherlands/)

**CROSS-BORDER ECOMMERCE:** [www.statista.com/statistics/875205/leading-countries-for-cross-border-e-commerce-purchases-from-the-netherlands/](http://www.statista.com/statistics/875205/leading-countries-for-cross-border-e-commerce-purchases-from-the-netherlands/)

**PERCEIVED BARRIERS:** <https://ec.europa.eu/eurostat/data/database>



# THANKS

At the moment, it can be difficult to see any further than the next flare-up in the Covid-19 pandemic. In whatever countries retailers operate, the reality is that business conditions can change tomorrow. This is not just because of government interventions, but because basic human behaviour is so difficult to predict. As we approach the winter, there is no guarantee, for example, that people will behave the same way they did when we were approaching spring. Time has gone on. The prospect of the bleak midwinter may make some more anxious to get out into the world whenever opportunities present themselves. Some have become close to blasé about the risks posed by Covid-19. Others have grown more cautious.

However, one pattern reoccurs in our research across different countries. The current epidemic has accelerated consumers' move towards doing more of their shopping online. This is not just because of ongoing health concerns, but because consumers are realising that ecommerce makes their lives easier.

Against this backdrop, it is fascinating to consider what the next five years may hold for the Benelux region's ecommerce sector. Thanks to the combination of geographic, socio-political and economic factors that we have explored in this report, it seems likely that Benelux will become one of the global centres of ecommerce. In particular, we expect the region's geographical advantages to make it a centre for logistics development as ecommerce continues to gain market share throughout Europe.

It may also be that Brexit so disadvantages the UK ecommerce sector that companies based in the region benefit. As for Amazon's entry into the Dutch market, it may shake up the Dutch ecommerce sector, making it more creative and dynamic, with effects far beyond the borders of the Netherlands.

However, it would be a brave soul who would make such sweeping predictions with any certainty. For now, we think this report offers a picture of a regional ecommerce sector in a state of flux, but one which continues to offer online retailers huge opportunities. ■

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