

## Press Release

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### Online Retail is developing at different Paces within Eastern Europe

In its latest report "Eastern Europe B2C E-Commerce Report 2012", Hamburg-based secondary market research company yStats.com presents information about trends, sales, shares of B2C E-Commerce on total retail sales and popular product categories as well as Internet users, online shoppers, and important competitors on the Eastern European B2C E-Commerce market. The main markets Russia, Poland, Czech Republic, Ukraine, Hungary, and Slovakia are analyzed more closely, information about Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Estonia, Greece, Latvia, Lithuania, Macedonia, Romania, and Slovenia is also included.

An increase in both Internet users and online shoppers can be observed in the whole Eastern European region, but the individual markets display strong differences. While Russia is leading both in terms of online sales and with regard to the total number of Internet users, Slovakia exhibits an Internet penetration, which is above the total European average.

#### High Growth Rate in Russian B2C E-Commerce until 2015

The number of Internet users is expected to amount to nearly 60 million by 2012, 40 million of whom are projected to access the Internet daily. B2C E-Commerce continues to grow, too: by 2015, revenue is expected to be twice as high as in 2011. In 2011, B2C E-Commerce accounted for less than two percent of total retail sales. The product category with the highest online revenues in 2011 was electronics and home appliances, followed by computers, notebooks and parts as well as shoes and clothing. Online supermarket Utkonos.ru aims to shift all business activities to online sales starting in 2013, closing all of its supermarkets and pick-up stations. Comparing sales figures, in 2011, Utkonos.ru was the leading online shop in Russia, followed by mass merchant Ozon.ru and electronics retailer Komus.ru.

#### Particularly Mobile Commerce grows in Poland

In 2012, B2C E-Commerce was expected to grow by approximately 25 percent in Poland, which is nevertheless a lower growth rate than in previous years. In June 2012, the most purchased products in B2C E-Commerce in Poland were clothing/shoes, followed by household appliances/consumer electronics/digital media. The number of mobile online orders is growing considerably. In 2011, M-Commerce grew more than sevenfold in Poland compared to the previous year. Price comparison sites, some of which feature user ratings, were especially popular among Poles in 2011. Internet users most frequently visit the shopping site of mass merchant Allegro.pl, followed by Groupon.pl.

#### Many Czechs purchased Clothing on the Internet

In 2011, more than 60 percent of all Czechs used the Internet and approximately one third of all Internet users conducted online purchases. Mobile purchases ranked among the preferred activities of the increasing number of smartphone users in the Czech Republic in 2011. Average per capita spending on online purchases in the Czech Republic decreased in 2011 from the rate in 2010. However, growth of average per capita spending by a single digit percentage figure was forecasted for 2012. In 2011, Czech consumers spent an average of 1,000 Czech Crowns per online clothing purchase. This amounts to almost 40 Euro. The most popular product category in the Czech Republic was clothes and footwear in 2011, followed by tickets and cosmetics. In 2011, Alza.cz was the leading online shop in terms of sales, followed by Mall.cz and Kasa.cz. Consumer electronics retailer Alza.cz also invested in M-Commerce, presenting its mobile shopping portal m.alza.cz in March 2012.

#### Online Retail also on the Upswing in Ukraine and Hungary

In Ukraine, both the number of Internet users and their share on the total population grew constantly between 2008 and 2012. Herewith connected, B2C E-Commerce sales also increased strongly from 2010 to 2011. Among the most purchased online product categories were household goods as well as clothes,

shoes, accessories, and jewelry. In 2011, mass merchant Rozetka.ua generated the highest online revenues, distantly followed by the computer and electronics retailers Allo.ua and Fotos.ua.

B2C E-Commerce in Hungary also shows a constant upwards trend. While two-thirds of individuals already used the Internet in 2011, the share of online shoppers on the total population was considerably lower. Nevertheless, B2C E-Commerce sales increase in Hungary by a mid-range double-digit percentage figure every year, partly based on the great popularity of online coupon retailers. In this field, online coupon seller Bonusz Brigad generated the highest sales in 2011, followed by Kupon Vilag and Napi Tipp.

### **Slovakia with higher B2C E-Commerce Growth than many other Countries in Eastern Europe**

B2C E-Commerce in Slovakia is increasing relatively fast compared to other Eastern European countries. Especially young people conduct online purchases here. The products that were most purchased online in 2011 were clothes and sports goods as well as household goods. Groceries, on the other hand, did not represent a product category that was purchased much on the Internet. This, however, did not prevent British supermarket chain Tesco from opening an online grocery shop in Slovakia in October 2012.

In Bulgaria, both Internet user penetration and online shopper penetration were distinctly below other countries in Eastern Europe. Online retail here was especially concentrated on the south-western region of the country in 2011. In Croatia, mainly clothes and sports goods as well as books, magazines, and E-learning material are bought online. However, event tickets represent the most popular product category in Estonian online retail. In 2011, B2C E-Commerce sales in Greece only increased half as much as in previous years, whereas the number of online shoppers grew more between 2010 and 2011 than in the years before. In Slovenia, nearly a third of individuals used mobile devices to access the Internet in the first quarter of 2012, however, only a small single-digit percentage figure of all online purchases was conducted using such devices.

B2C E-Commerce in Eastern Europe is on a course for growth, with most countries increasing their online sales between 10 and 45 percent annually, as stated by the secondary market research company yStats.com from Hamburg in its report "Eastern Europe B2C E-Commerce Report 2012". Regarding online shopper penetration, considerable differences are noticeable in Eastern Europe, where countries such as Russia and Slovakia are much more developed than countries such as Bulgaria and Romania.

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