



Germany eCommerce Market Report - 2021

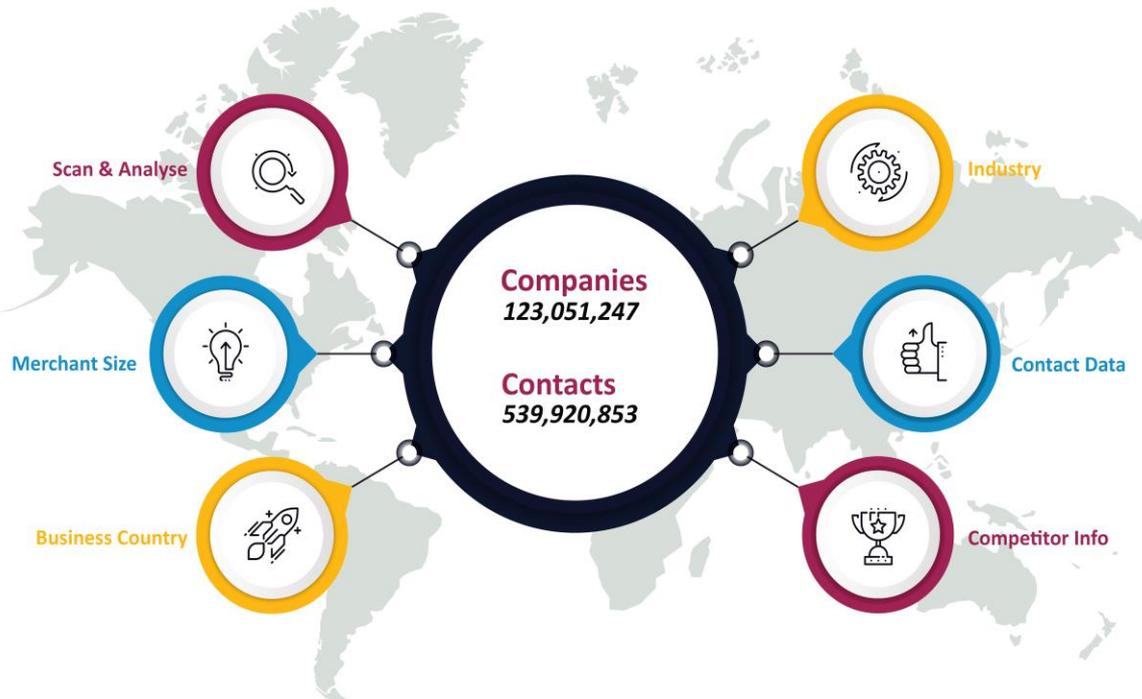
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About TAMI

TAMI patent technology helps companies to size their market opportunity and generate sales leads for their sales and marketing team. TAMI stands for Total Addressable Market Intel. With over 123M companies and 540M verified contacts we can help your company increase hit 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 to their services . Our technology is a B2B search engine similar to Google for which a patent has been granted in Europe. Below graphic shows how TAMI scans the internet





CEO Insight



Germany is the 5th largest eCommerce market globally with annual online sales estimated at \$107 billion, which is roughly 8.4% of the total eCommerce retail sales worldwide.

In 2021, there was **809K** additional domains registered which is an increase of 10% YoY. As expected, eCommerce grew substantially as evidenced by **314,000** e-Commerce enabled websites.

Unlike the UK, Germany's retail market survived COVID as the German government suspended the rule that a company had to file for insolvency if they ran out of cash. Instead, the German government provided a lot of supports to assist the retail and hospitality industries.

The German Bundestag parliament had called for the adoption of B2B mandatory e-invoicing to help combat VAT fraud. This follows the successes in Italy, Hungary and plans for Poland and France in 2023.

We are likely to see a continued surge in eCommerce both B2B and B2C in Germany but when it comes to mobile payments Germany is substantially behind other markets such as Asia, US and UK.

2021 Germany Internet Sales

GERMAN eCOMMERCE MARKET REPORT AT A GLANCE (2021)

The German eCommerce market is worth **€107.1B**



There are **9M** registered domains in Germany

2.8M of these domains are active websites

314K of these active sites are eCommerce enabled

149K of these eCommerce enabled sites are shipping products

303K of these active sites are shipping



89.8% of Germans use the internet

52% of Germans aged 70+ are internet users

92% of German online shoppers use Amazon

2021 eCommerce growth rate of **19%**

Average revenue per German user (ARPU) **€1082**

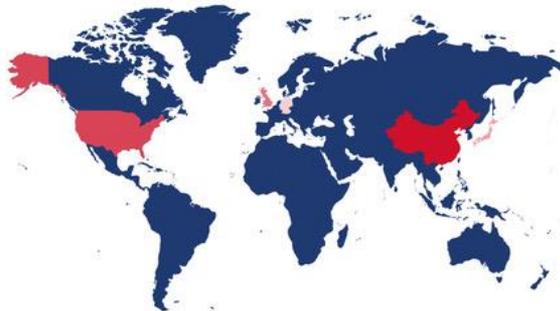
72% of Germans have bought online in 2021

Germany ranks **10th** for Mobile market globally

German teens spend an average of **258** minutes daily on the internet

Global Comparison

(based on eCommerce market worth)



1. China
2. United States
3. United Kingdom
4. Japan
5. Germany

Based on an analysis of **149K** eCommerce sites shipping products



2020 Germany Amazon



€31 billion
in sales in 2021



22% sales growth
between 2020 to 2021



92% of shoppers
in Germany are using Amazon



17 million German
shoppers subscribed to Amazon Prime



23,000
Employees



9 fulfillment
centers of a total of 41 in the EU



eCommerce Platforms

Top 10 eCommerce Carts

Contact us at
hello@tami.co.uk
to find a list of websites
that use these companies



30% of eCommerce websites are built on customized platforms, with many of these being large merchants doing more than \$20M+ in online sales

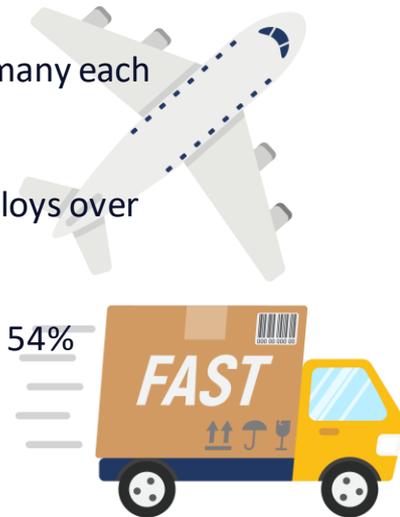
When acquiring these customers, the sales cycle is significantly longer as integration efforts are higher. Businesses need to consider a war chest and provide the merchant with a monetary inducement to complete the integration

Shipping



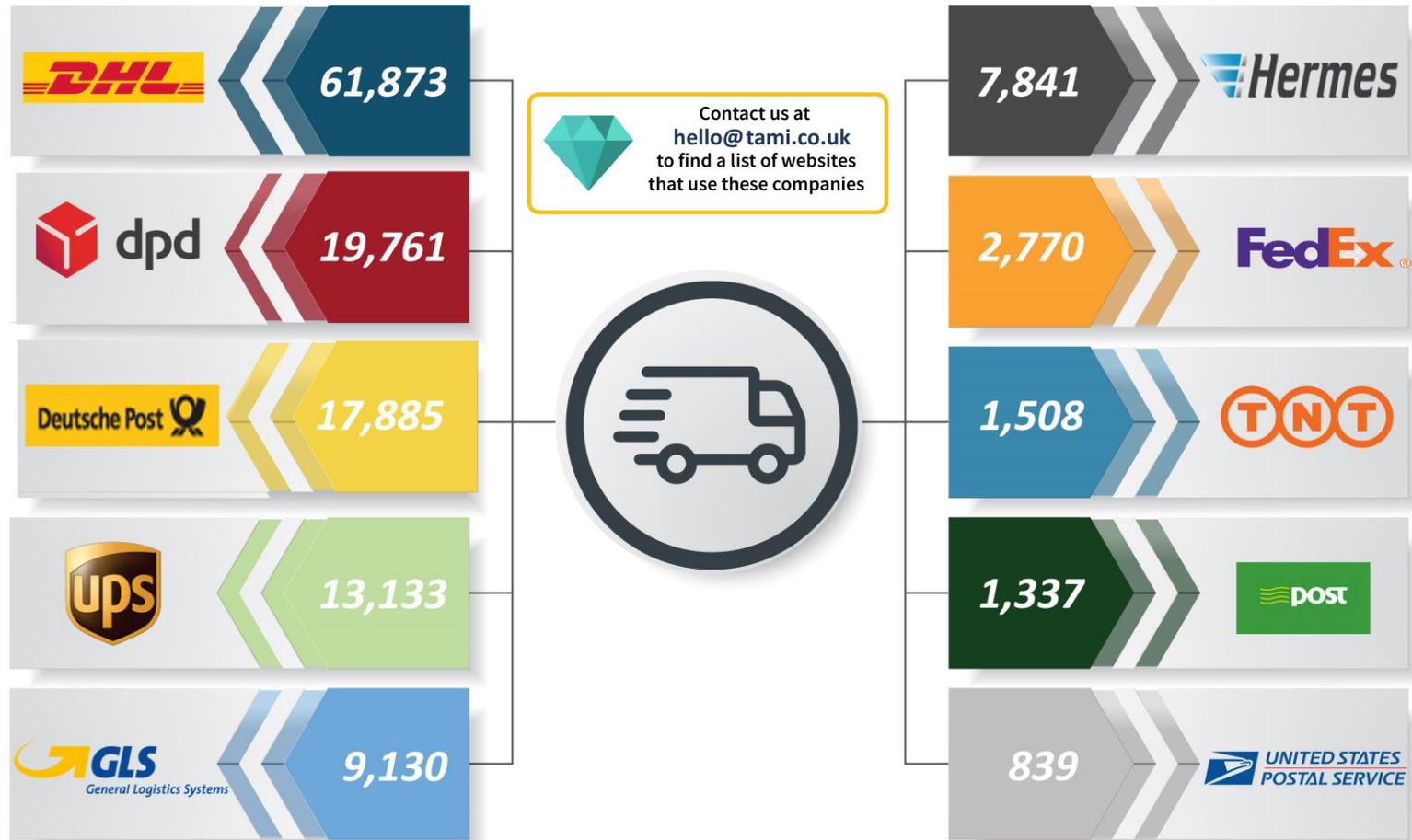
eCommerce Germany Shipping Market

- In Germany in 2020, 130 parcels were generated every second or 11 million each day.
- Germany parcel volumes are set to continue to grow, rising from around 3.7 billion in 2021.
- The revenue market of the German parcel market comes in at €23.5bn.
- From our analysis, DHL is the most popular shipping company used by eCommerce retailers in Germany. Trailing DHL is DPD, Deutsche Post, UPS and GLS.
- DHL generated the highest revenue at \$11.7 billion an increase of 22%
- The coronavirus pandemic turbo-charged German e-commerce in 2020, with total sales jumping 14.6 percent to EUR 83 billion, a new record. More than one-third of that volume comes from a single company: Amazon.
- Amazon sends almost a third of the 1.4 billion parcels delivered to private customers in Germany each year
- Amazon has invested over EUR 8 billion in German facilities and infrastructure and now employs over 20,000 people countrywide
- Although Amazon has made a strong presence in the German parcel market, DHL still obtain 54% market share.



Top 10 Shipping Companies

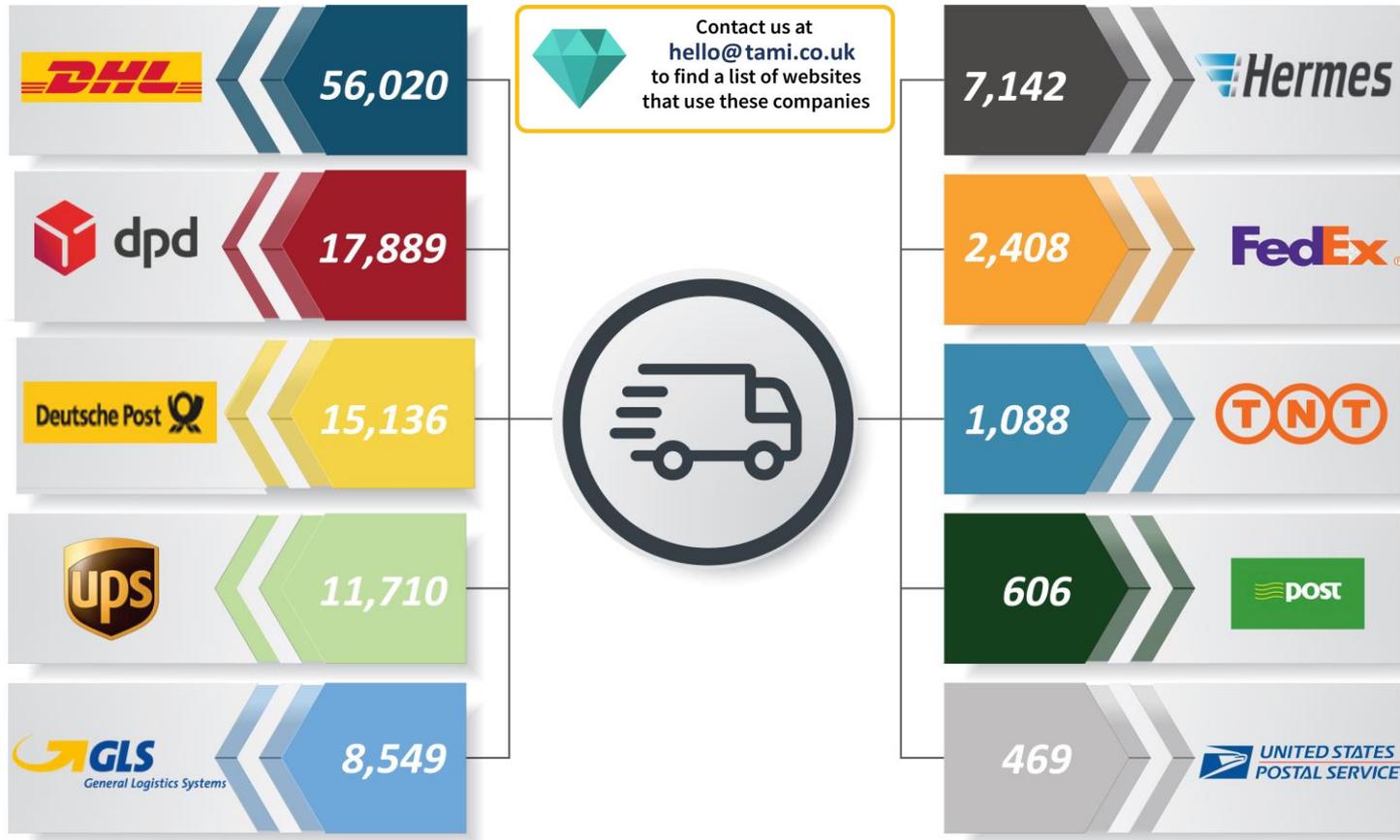
Based on analysis of 303,514 websites that ship products, the following are the top shipping companies mentioned on their websites excluding Amazon



eCommerce - Top 10 Shipping Companies

Based on analysis of 313,952 eCommerce websites that ship products, the following are the top shipping companies mentioned on their websites excluding

Amazon



Most Popular Web Tech –Int Shipping

The following is the most popular website technologies used by merchants who internationally ship.



Count of websites where evidence of international shipping is found



Contact us at
hello@tami.co.uk
to find a list of websites
that use these companies

Shipping Terms

Based on analysis of 303,514 German shipping websites, here is the % breakdown of merchants that provide the following services:



Roughly 89% of merchants in the Germany offer free shipping to customers, and only 1% offering next day shipping. Amazon on the other hand, offers free delivery on many products over 29.00 EUR to Germany, Austria, Belgium, Liechtenstein, Luxembourg and the Netherlands , and next day shipping for Prime customers. 12% of eCommerce merchants shipping products use more than 1 carrier

A black and white photograph of a person sitting at a desk, using a laptop. The person's hands are visible, with one hand on the keyboard and the other holding a credit card. A blue banner with the text "Payments & eCommerce" is overlaid on the image. A yellow horizontal bar is also present on the right side of the banner.

Payments & eCommerce

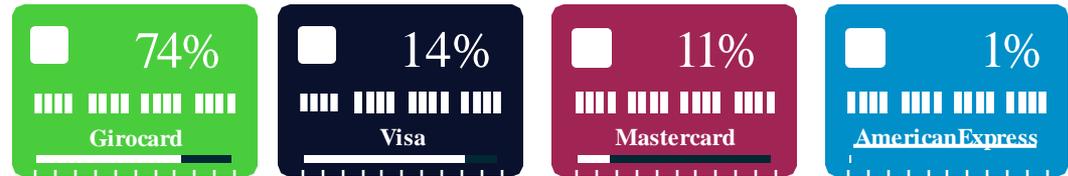
Germany eCommerce Payment Insights

Similar to many countries, COVID-19 has spurred additional online growth. Buy now, pay later (BNPL) options continue to grow online and at the POS. They are now the second most popular way to checkout online. Retailers looking to provide checkout options will want to enable acceptance of options like Klarna and Afterpay. The increase in mobile e-commerce continues to push growth with mobile and digital wallets, which are the number one method for online checkout.

2020 e-com mix by payment method

Digital/Mobile Wallet	-	26%
Buy Now / Pay Later	-	19%
Direct Debit	-	18%
Bank Transfer	-	13%
Credit Card	-	10%
Charge & Deferred Credit Card	-	4%
Cash on Delivery	-	4%
Debit Card	-	2%

2019 card brand breakdowns (e-com and POS)



Top 10 Payment Companies



78% of all Germany eCommerce merchants declare who they use for payment processing on their website either via image, text or JavaScript.



75% of these merchants are using PayPal which is a massive share of the market

Klarna.

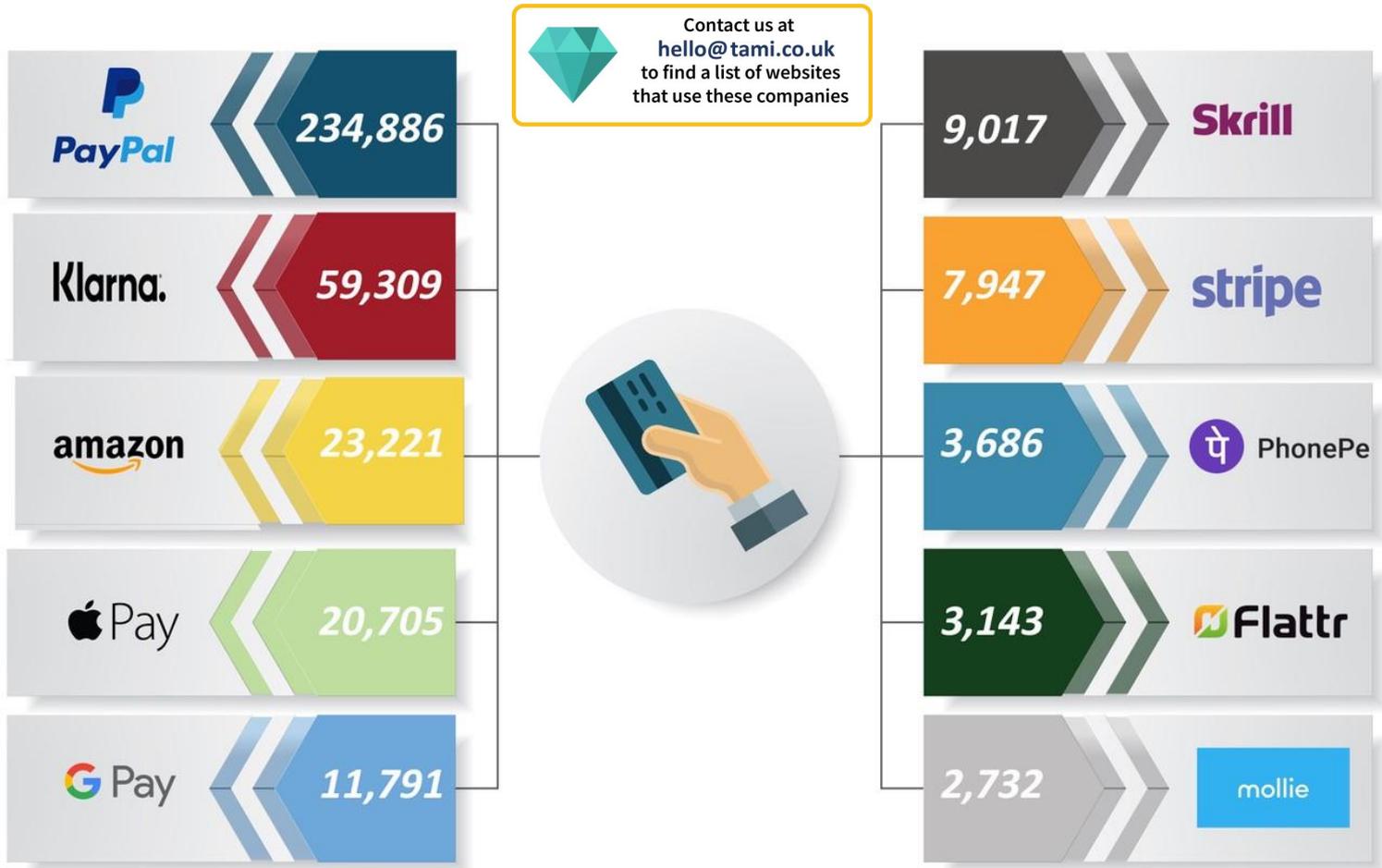
Klarna jumped up to 2nd place with 59K eCommerce merchants now using Klarna as BNPL is only progressing in the payment space.

amazonpayments

Amazon Payments have moved to third place followed by Apple Pay.

Top 10 Payment Companies

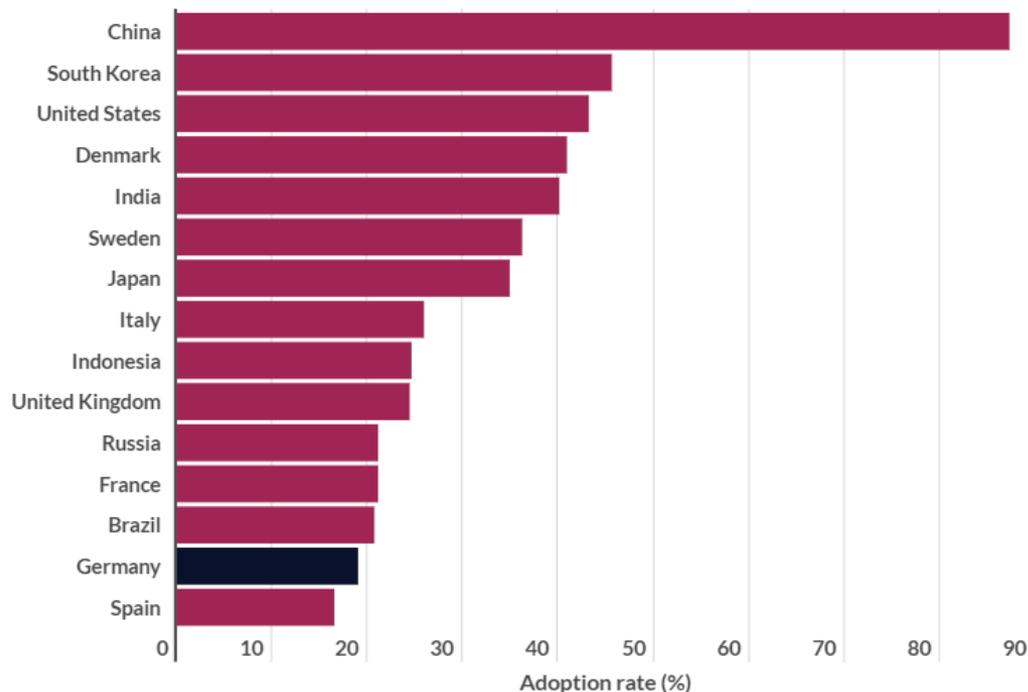
Based on analysis of 313K eCommerce websites the following are the top payment companies used by Germany merchants



Mobile Payments

- Germany has one of the lowest adoption rates in the world for mobile payments
- Cash continues to be king
- In Germany, less than 20% of smartphone users used proximity mobile payments in 2019
- Over 6.7 million users use their mobiles for payments daily
- It is expected this figure will reach 10.5 million by 2023, accounting for 14.6% of the population, or 19.4% of smartphone users

Adoption Rate by Country

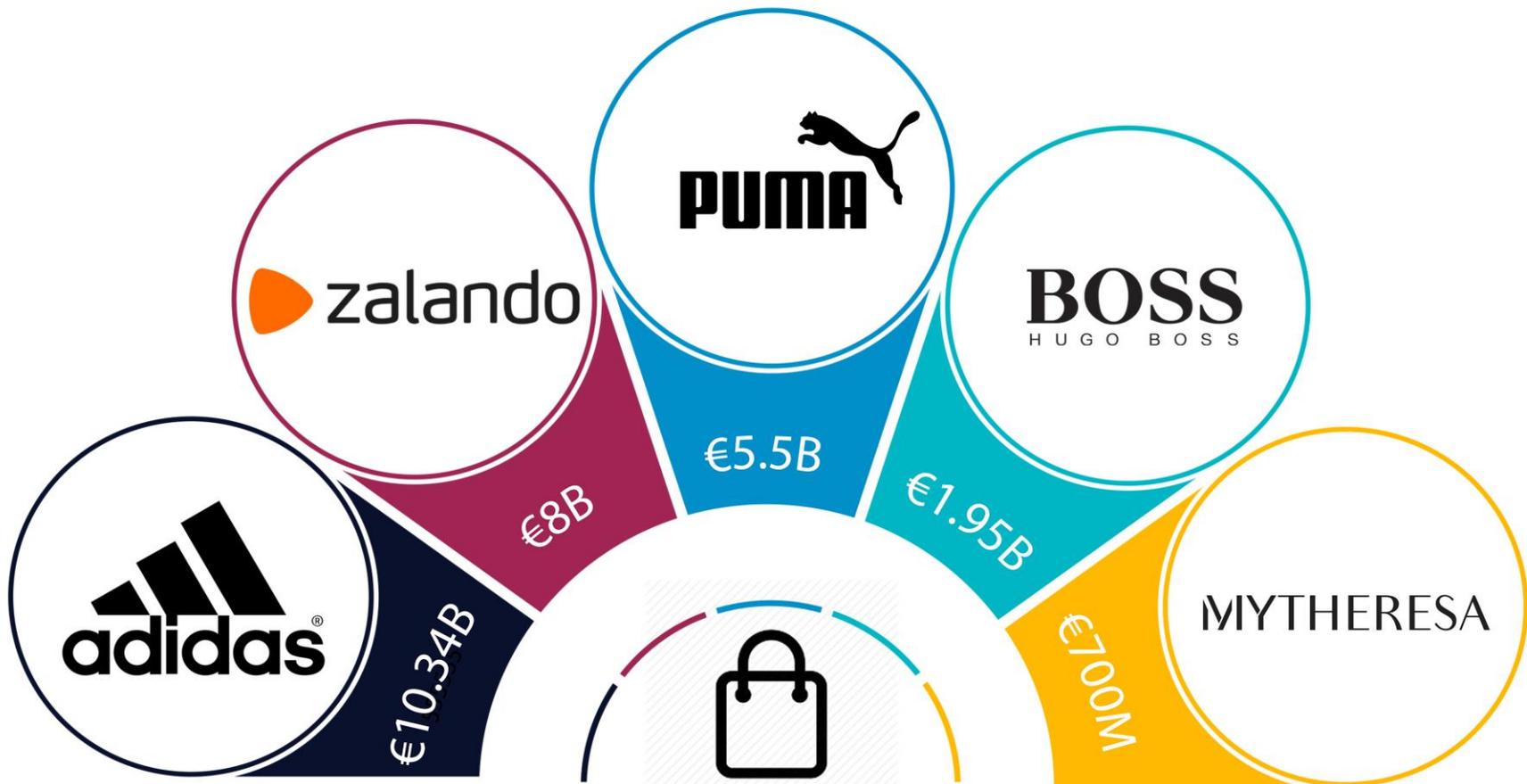


Sources: eMarketer, yStats

Key Players by Industry – Germany eCommerce Market

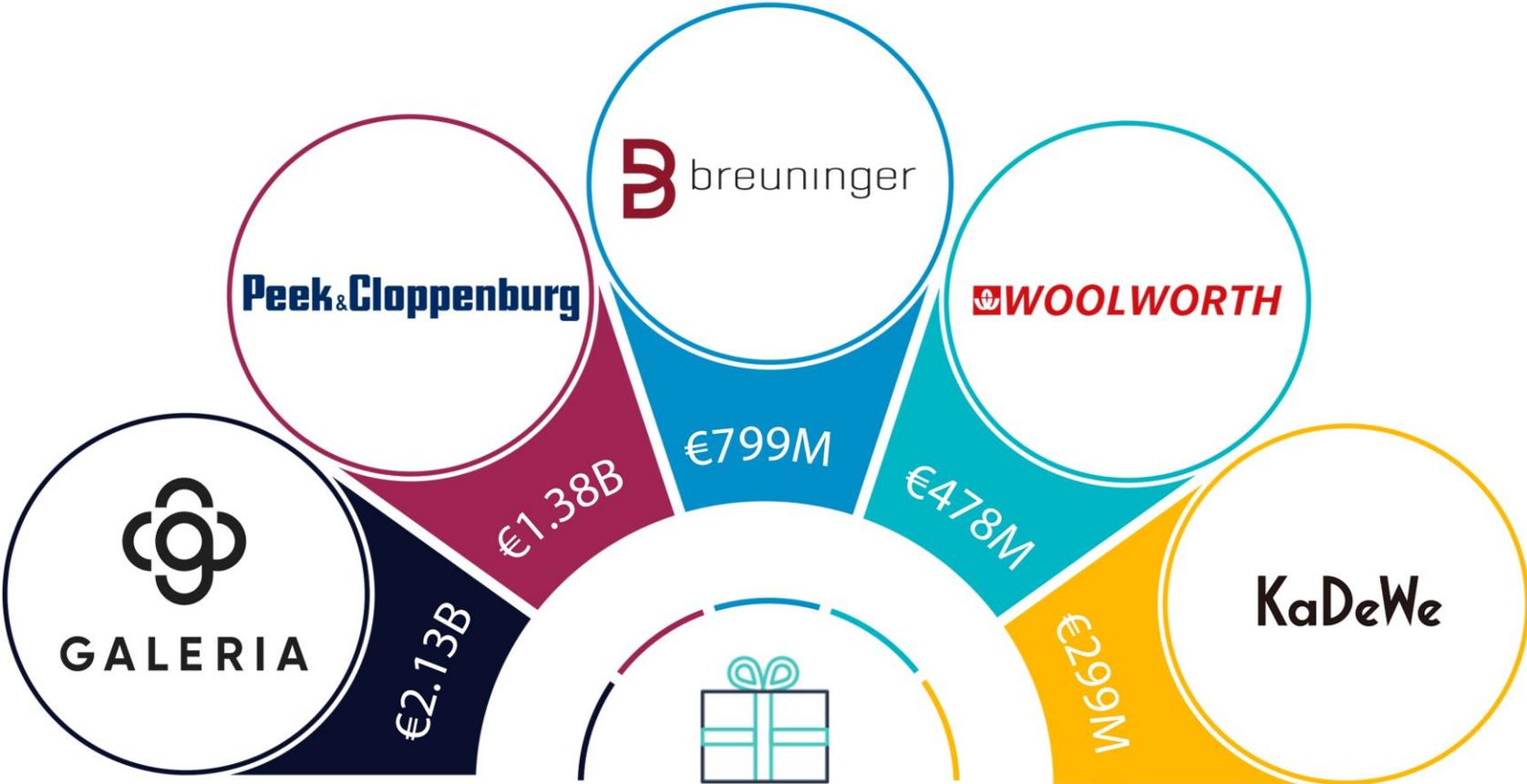


Top Germany Companies - Fashion



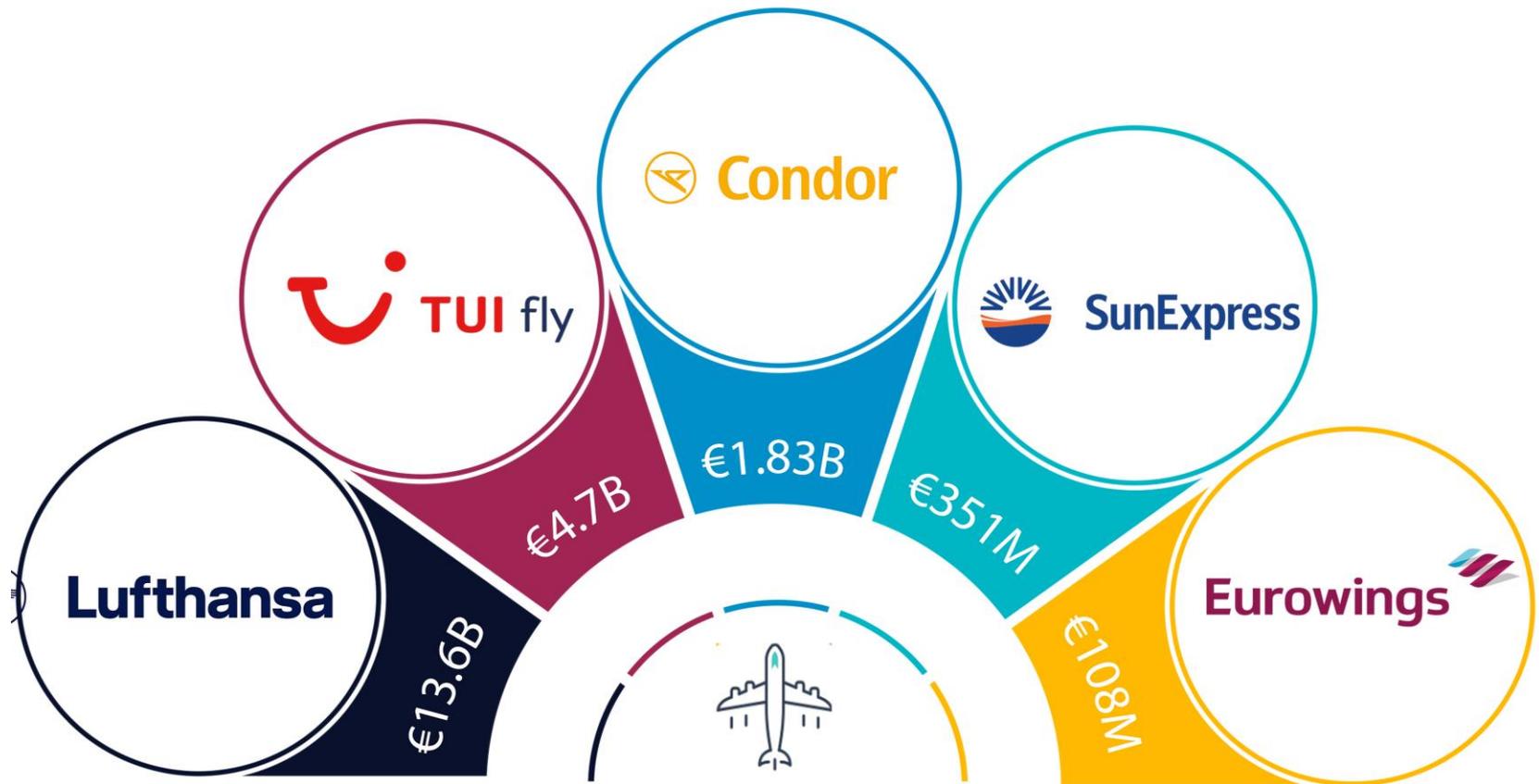
Although the owners of Adidas and Puma are brothers, there is a stifling difference between the turnover generated by each monopoly as Adidas is seen to have greater success in the fashion industry seeing as their turnover has reached a staggering €10bn compared to its brother Puma who's generated €5bn.

Top Germany Companies – Dept' Stores Online



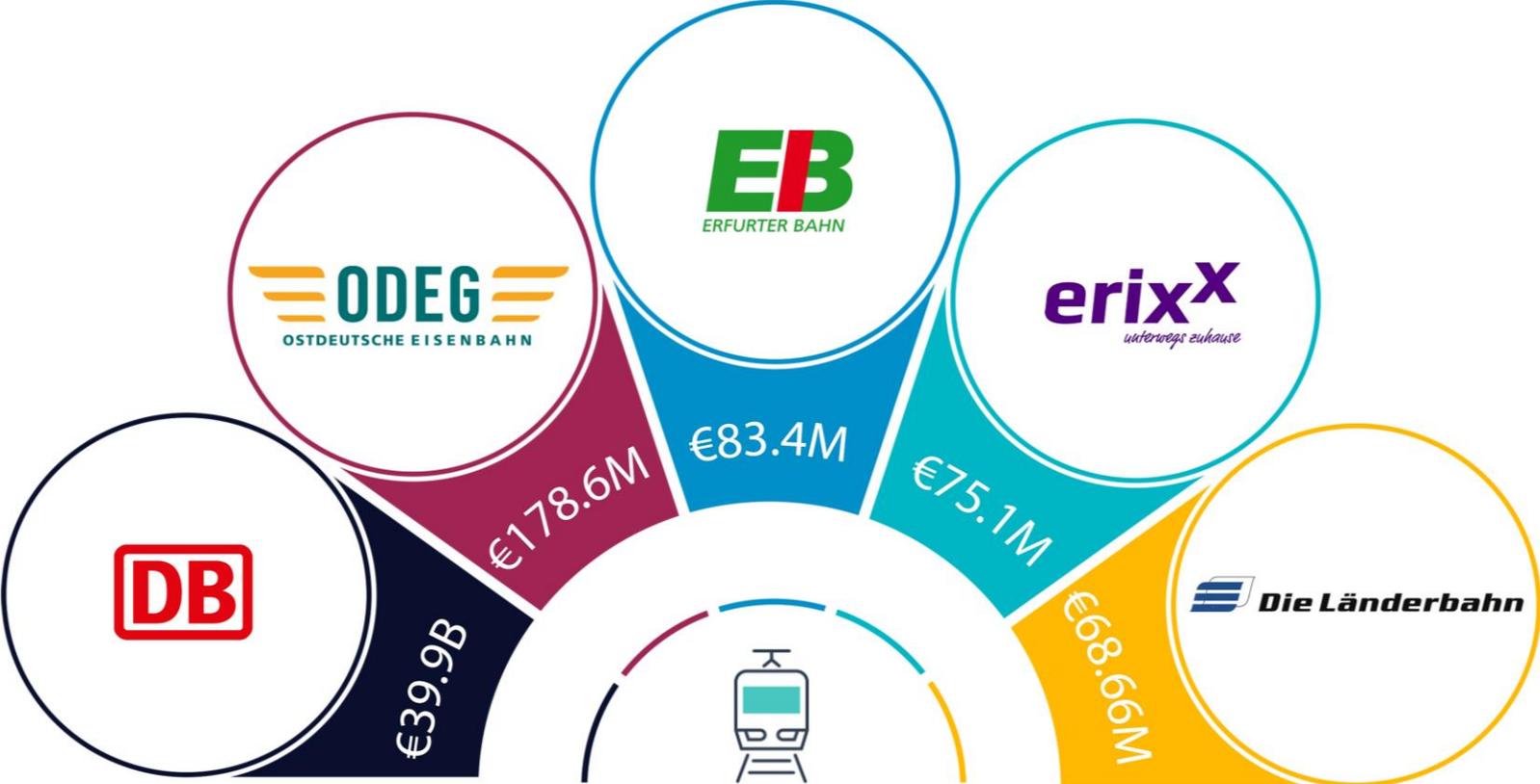
According to Businesswire who have claimed to have carried out extensive research regarding the Department Stores market in Germany, they have forecasted that the strength of this market will begin to wind down as they predict their growth is poised to reduce by \$1.3bn during 2020-2024. This could be due to the fact we see E-tailers such as Amazon becoming dominant market players.

Top Germany Companies - Airlines



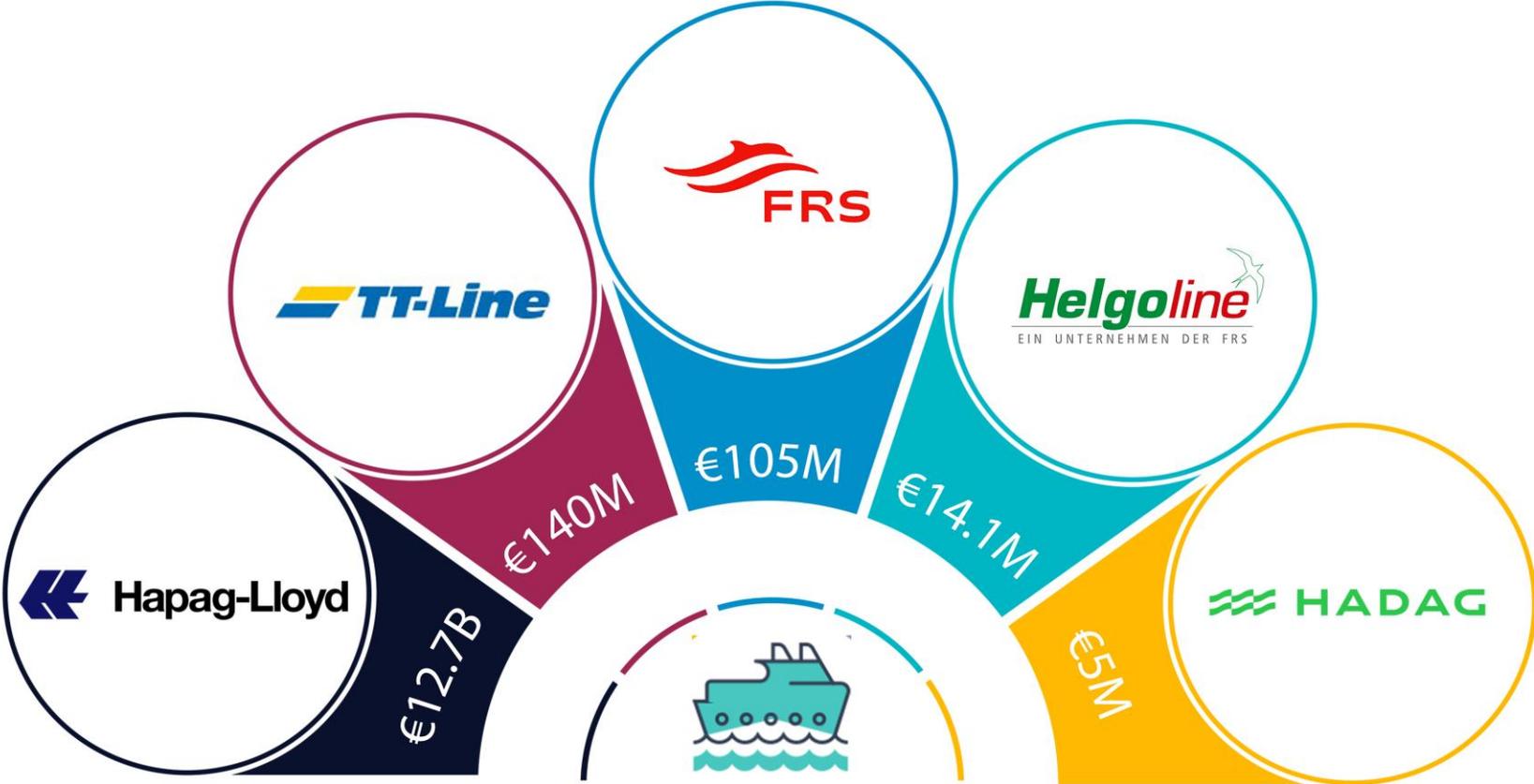
Undoubtedly the pandemic hit the aviation industry hard due to travel bans and restrictions implemented worldwide. This became clear through a massive drop in revenue by one of the world's largest airlines, Lufthansa. Lufthansa's revenue dropped from €36.4bn to €13.6bn leading to financial difficulties and employee redundancies.

Top Germany Companies - Trains



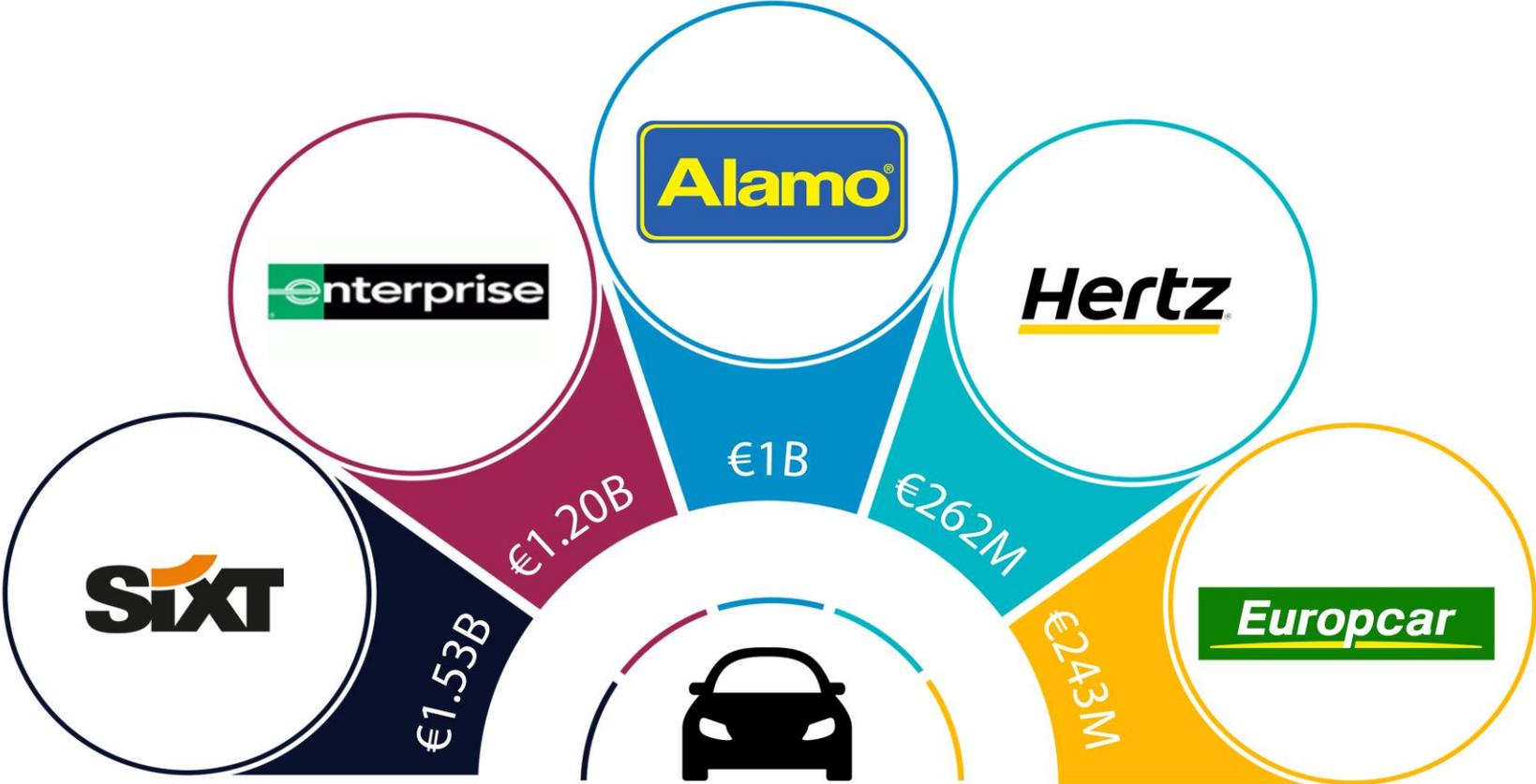
Similar to the aviation industry, new contracts for export sales in 2020 were down by 37.5%. However, it's not all doom and gloom as the German rail supply industry represented by VDB reported turnover of €12.5bn in 2020, a 7% increase compared with 2019.

Top Germany Companies - Ferries



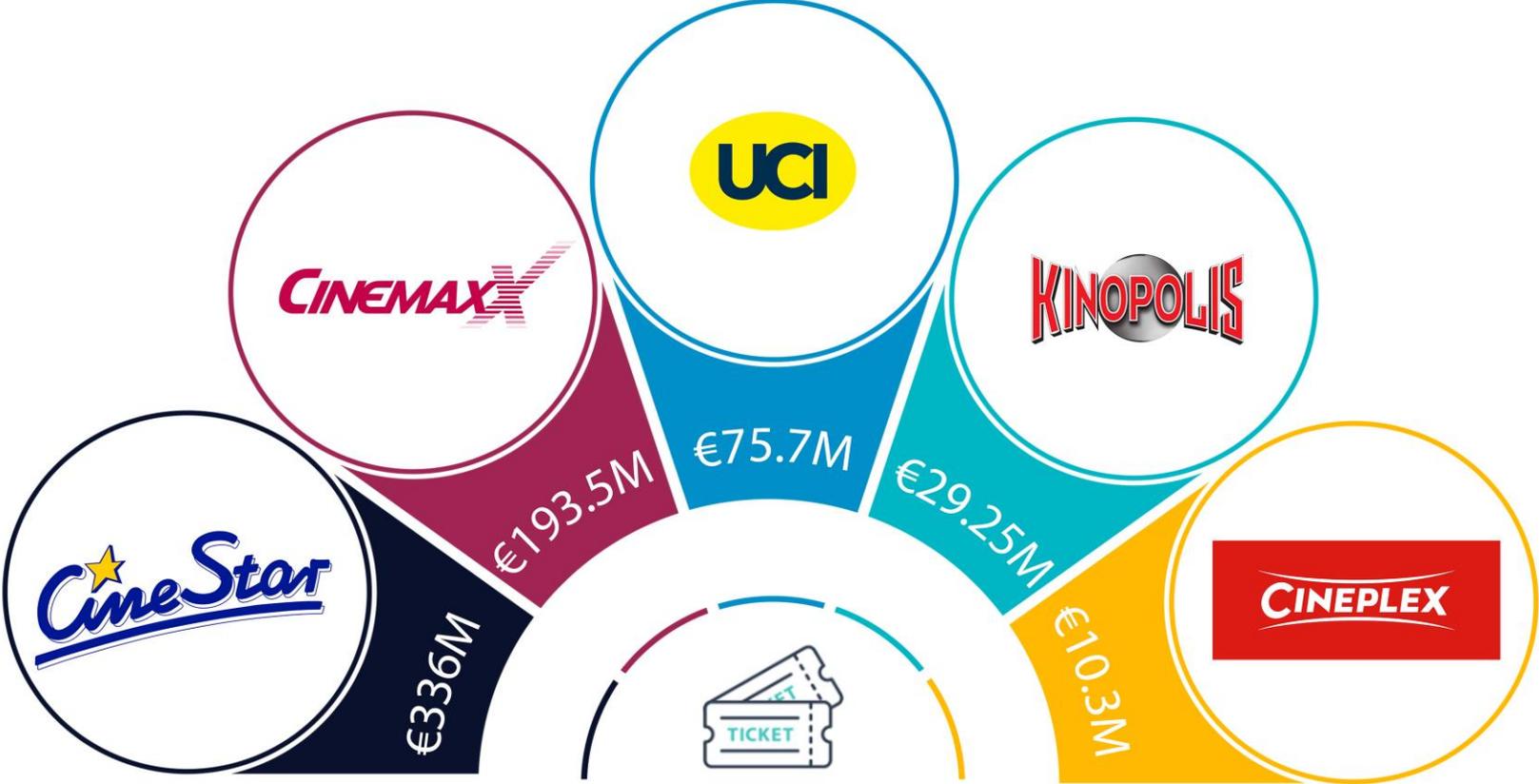
COVID hit the Germany Ferry Industry badly with overseas arrivals falling by 97.1% in June 2020. There were just 57,100 arrivals in June 2020 and 73,900 departures. This compares with monthly travel of approximately 2 million in each direction in June 2019.

Top Germany Companies – Car Hire



Due to the pandemic, with less people travelling car rental agencies such as Sixt and Enterprise saw a loss in potential revenue. However, due to the vaccine we expect this industry to see a massive boom as people are on the move again.

Top Germany Companies - Cinemas



In 2020, there were **4,926** cinema screens in Germany, a decrease compared to the previous year with 4,961. With the rise of online streaming services such as Netflix and NowTV, it is likely we will see the cinema industry begin to suffer due to how accessible these online services are becoming.

Top Germany Companies – Sports Packages



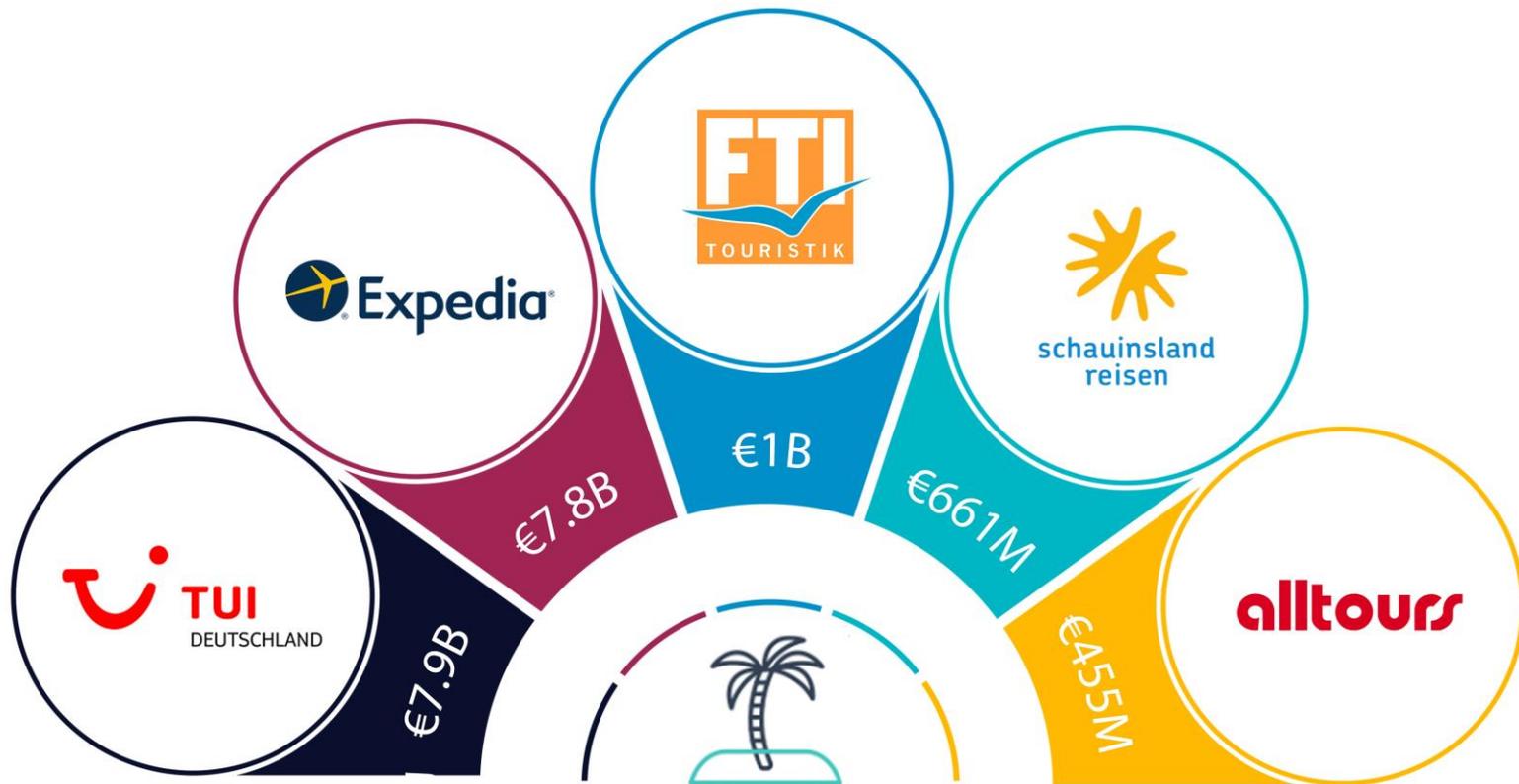
Although the football industry in Germany isn't as dominant as the UK, there are still household names present in Germany such as FC Bayern Munich who have seen great success in recent years as they lifted the Champions League Cup in 2020.

Top Germany Companies – Insurance



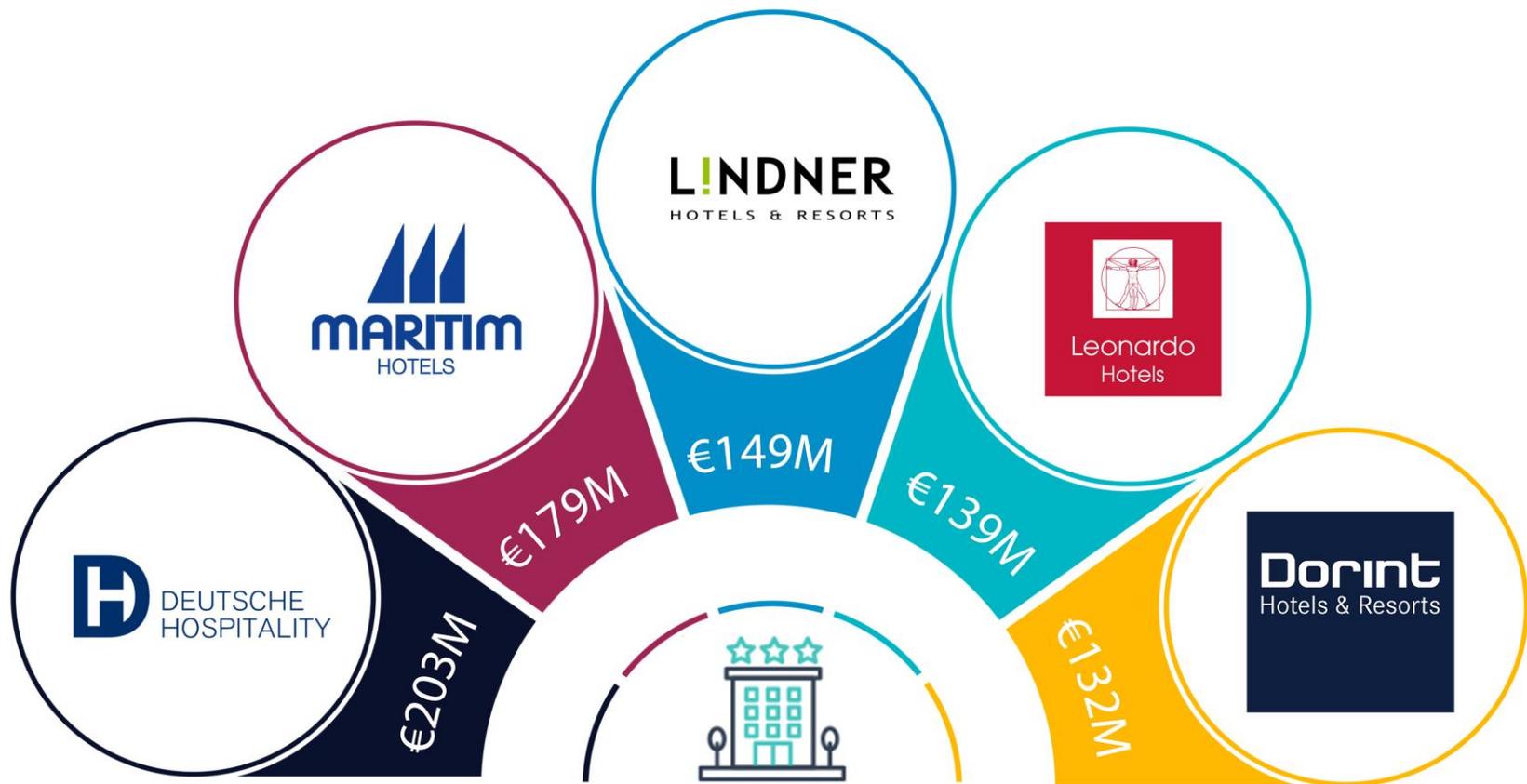
Germany General Insurance Market Size is worth €2.2B as the property and casualty insurance market in Germany is estimated to grow at a CAGR of approximately 3%, from 2021-2026.

Top Germany Companies – Travel Agencies



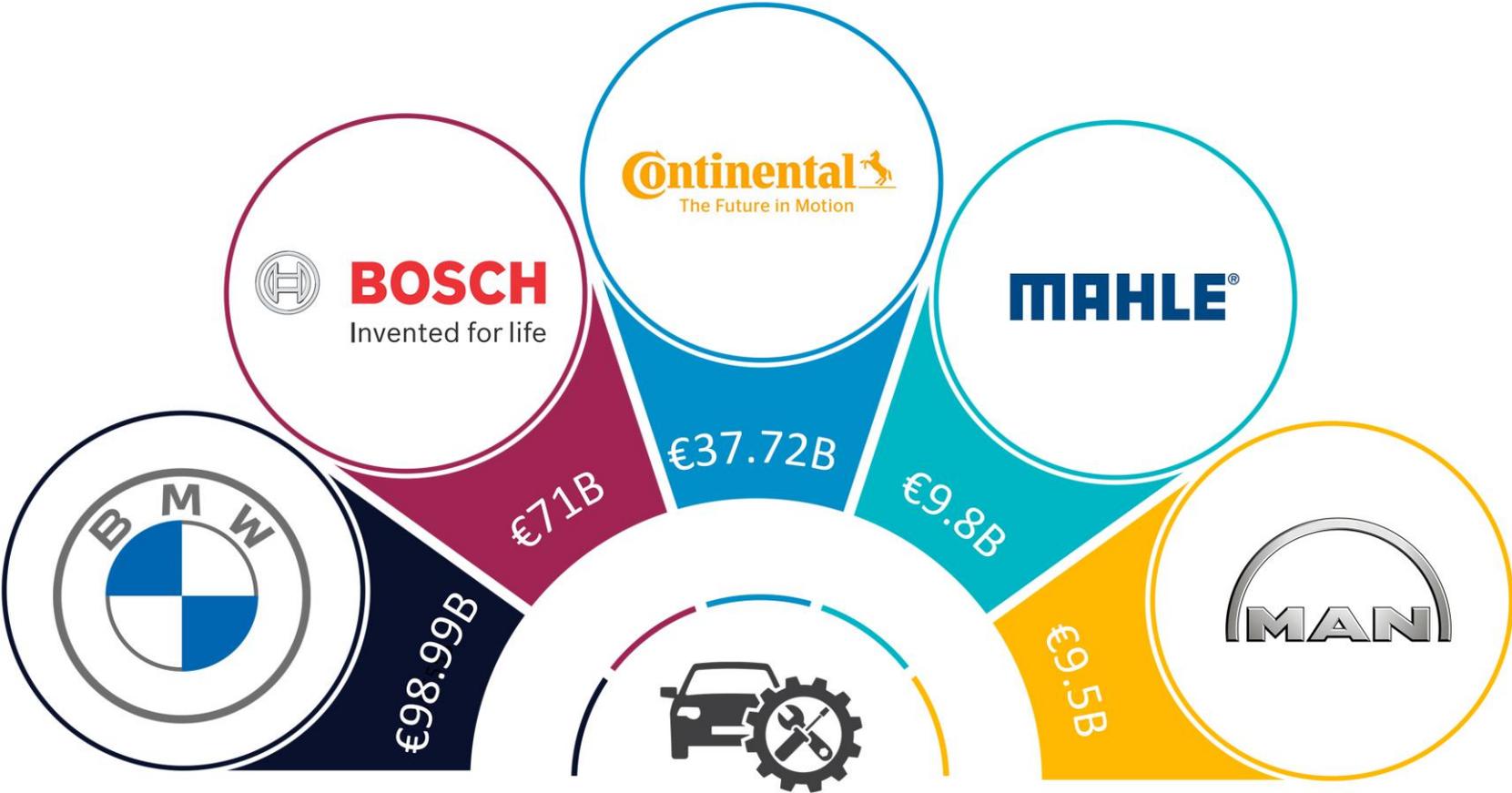
Tour Operations/Travel Agencies occupied 39% of the German Tourism Market in 2020, amounting to €12.5bn. Although this figure may seem impressive, there has been a huge drop in revenue from €35.4bn in 2019 to €12.5bn. This is largely due to the coronavirus pandemic.

Top Germany Companies - Accommodation



Currently there are almost 49,000 open and running accommodation establishments in Germany, with roughly 302.3 million overnight stays recorded in 2020. The share of overnight stays completed by guests from abroad is highest in hotels. Large cities in particular profit from this development.

Top Germany Companies - Auto Parts



In 2020, the auto sector listed turnover of **EUR 379.3 billion** – around 20 percent of total German industry revenue. Germany is Europe's number one automotive market, accounting for around 25 percent of all passenger cars manufactured (3.5million) and approximately 20 percent of all new car registrations (2.9million).

TAMI: The most complete and accurate picture of your market

The most up to date contact information & guaranteed email bounce rate of less than 5%, ensures you are never blacklisted

Staff Alerts

3 new employees

Grace Alawneh
Principal Network Architect
grace.alawneh@company.com
EMAIL CONFIRMED

New CEO hired

Nick Danville
CEO
nick.danville@company.com
EMAIL CONFIRMED

Dylan was promoted

Dylan Jasper
Partner
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Sasa Smith changed company

Sasa Smith
Sales Manager
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