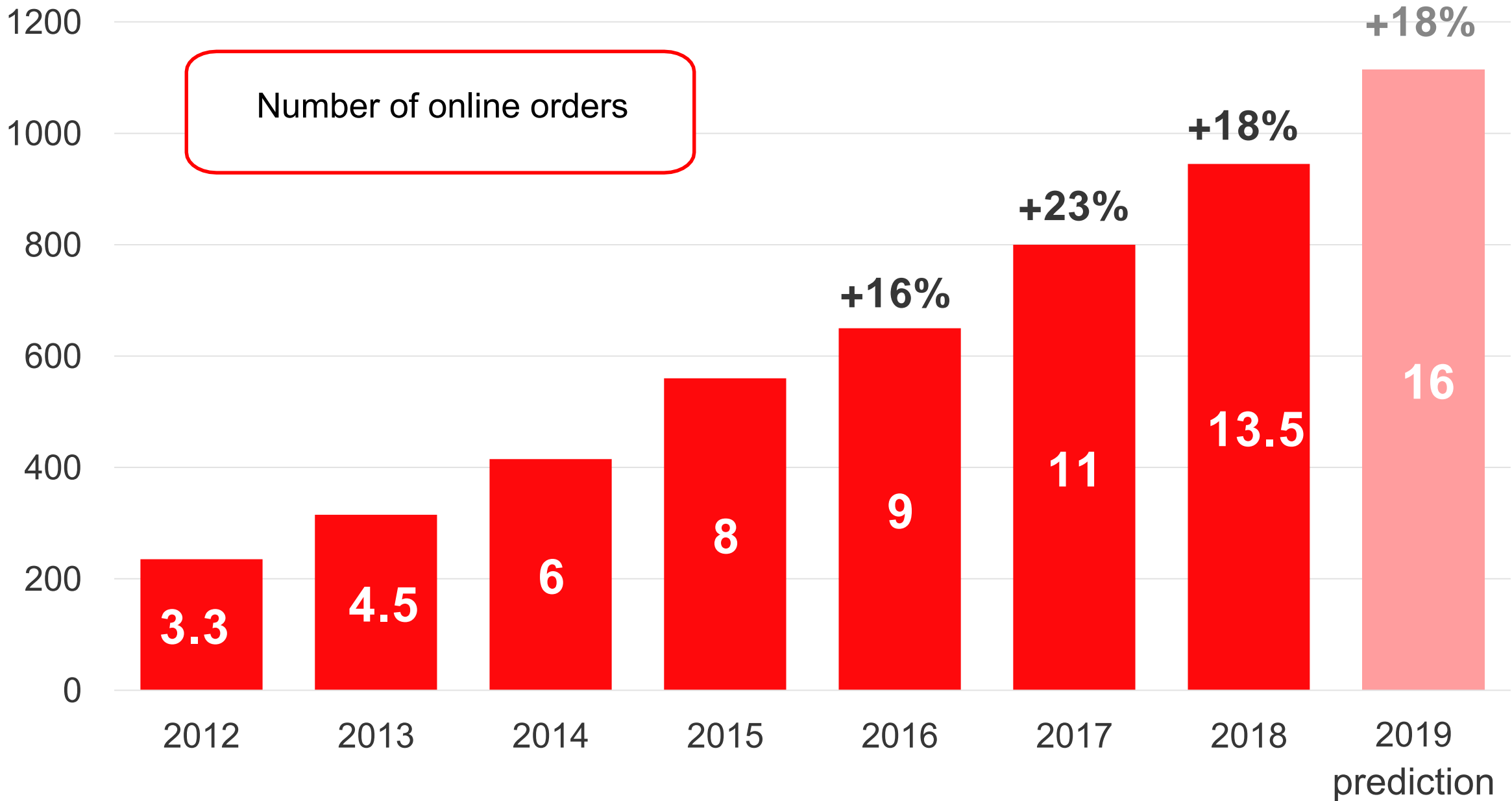2019

E-Commerce in Russia 2019

Online Russia

Market size

The volume of online sales grew by 18%

Internal online sales (tangible assets) EURO Mld.

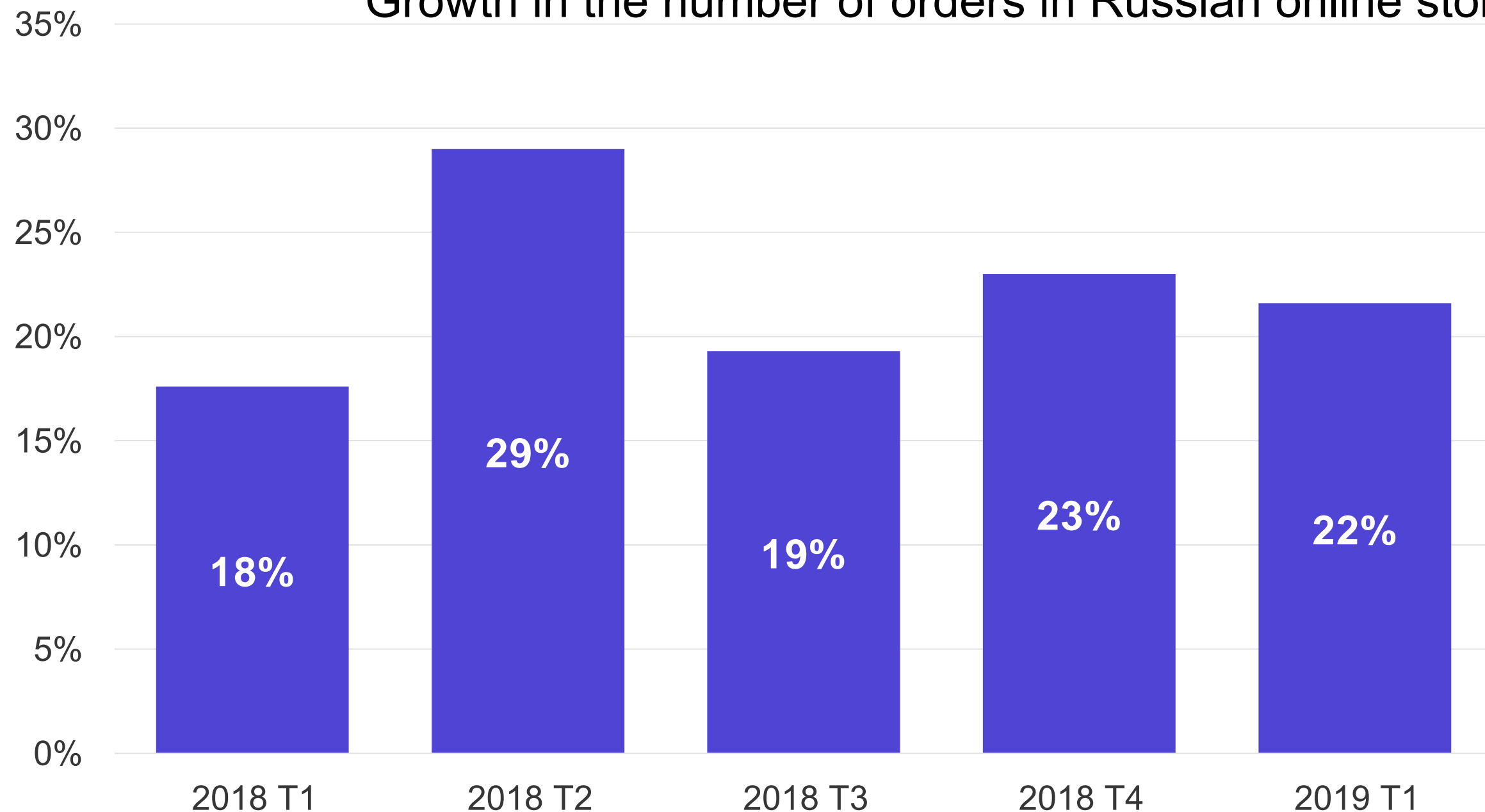Number of online orders

Year	Value	Growth
2012	3.3	
2013	4.5	
2014	6	
2015	8	
2016	9	+16%
2017	11	+23%
2018	13.5	+18%
2019 prediction	16	+18%

Online Russia

Components of growth

Internal online sales (tangible assets) EURO Mld.

	2012	2013	2014	2015	2016	2017	2018
Sell-Online	3.3	4.5	6	8	9.3	11.4	13.4
Sales growth	31%	34%	32%	35%	16%	23%	18%
Growth in the n. of the orders	28%	28%	25%	17%	7%	22%	22%
Average spending growth							-3%

Legend:
- Sell-Online
- Sales growth
- Growth in the n. of the orders
- Average spending growth
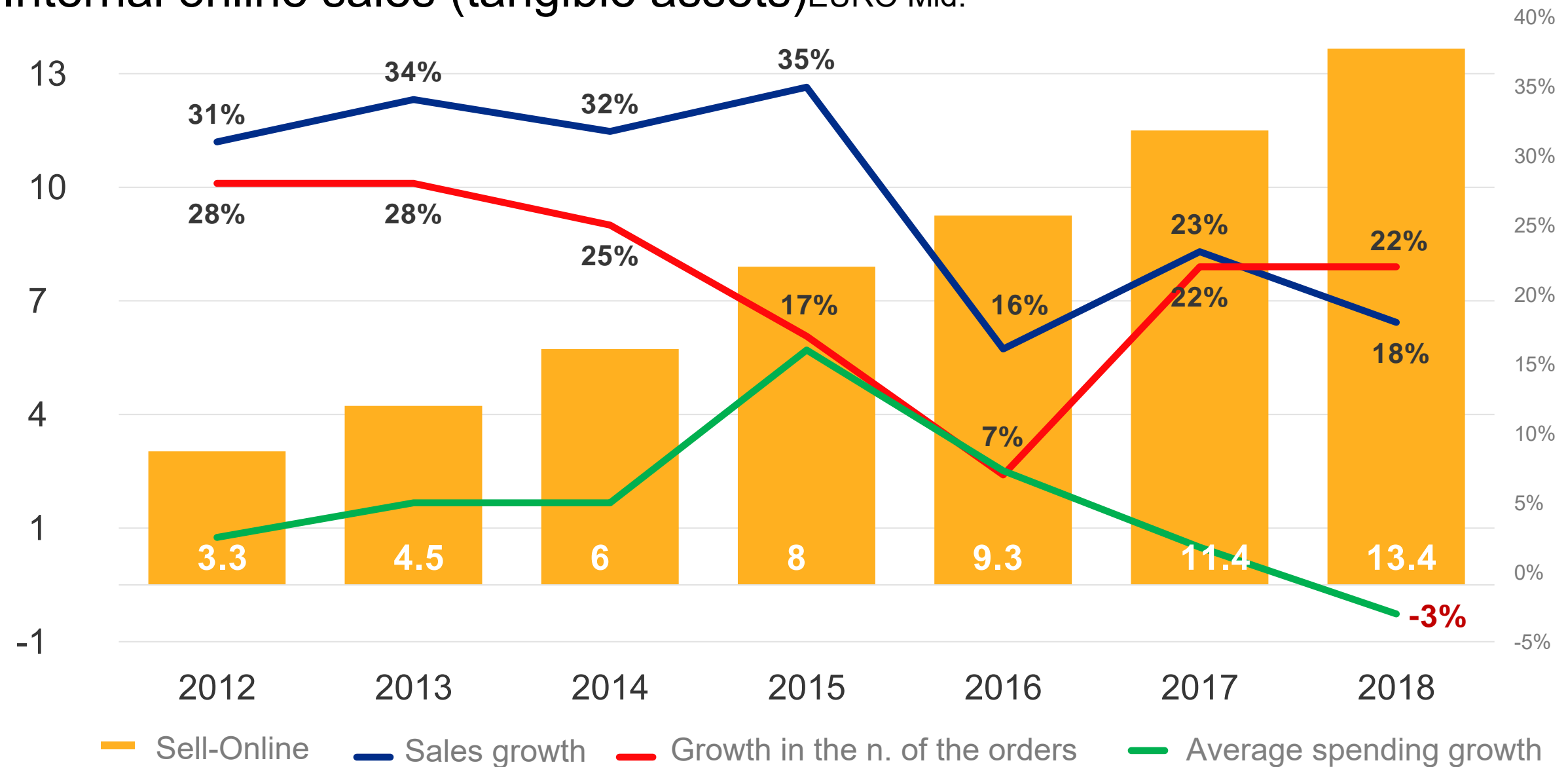
Online Russia

2019: First four months

Growth in the number of orders in Russian online stores

Bar chart showing growth in the number of orders:
- 2018 T1: 18%
- 2018 T2: 29%
- 2018 T3: 19%
- 2018 T4: 23%
- 2019 T1: 22%

T=quarter

2020: predictions

- Maintaining the growth rate of the number of online orders with an annual increase of 20%

- Slight negative dynamic of average consumption, especially in stores with a rapid increase of the orders

- Growth of the Russian e-Commerce market in monetary terms:+ 21%

TOP-10 online sales

#	SHOPS	Online sales		Orders, thousands		Average receipt, rub.	
		2018	Growth in %	2018	Growth in %	2018	Growth in %
1	WILDBERRIES.RU clothing,shoes and accessories	63 800	40%	39 800	37%	1 600	2%
2	CITILINK.RU universal shops	55 200	35%	5 190	33%	10 620	2%
3	DNS-SHOP.RU / TECHNOPOINT.RU technical and electronic	38 900	61%	5 800	71%	6 710	-6%
4	MVIDEO.RU technical and electronic	36 700	41%	3 570	71%	10 280	-17%
5	ELDORADO.RU technical and electronic	23 700	2%	4 340	11%	5 460	-8%
6	LAMODA.RU clothing, shoes and accessories	23 600	6%	4 030	5%	5 860	1%
7	OZON.RU universal shops	23 400	44%	8 640	51%	2 700	-5%
8	ULMART.RU universal shops	23 100	-37%	5 910	-24%	3 900	-18%
9	BONPRIX.RU clothing,shoes and accessories	16 500	10%	4 020	10%	4 120	1%
10	SVYAZNOY.RU technical and electronic	15 700	35%	1 480	37%	10 670	-1%

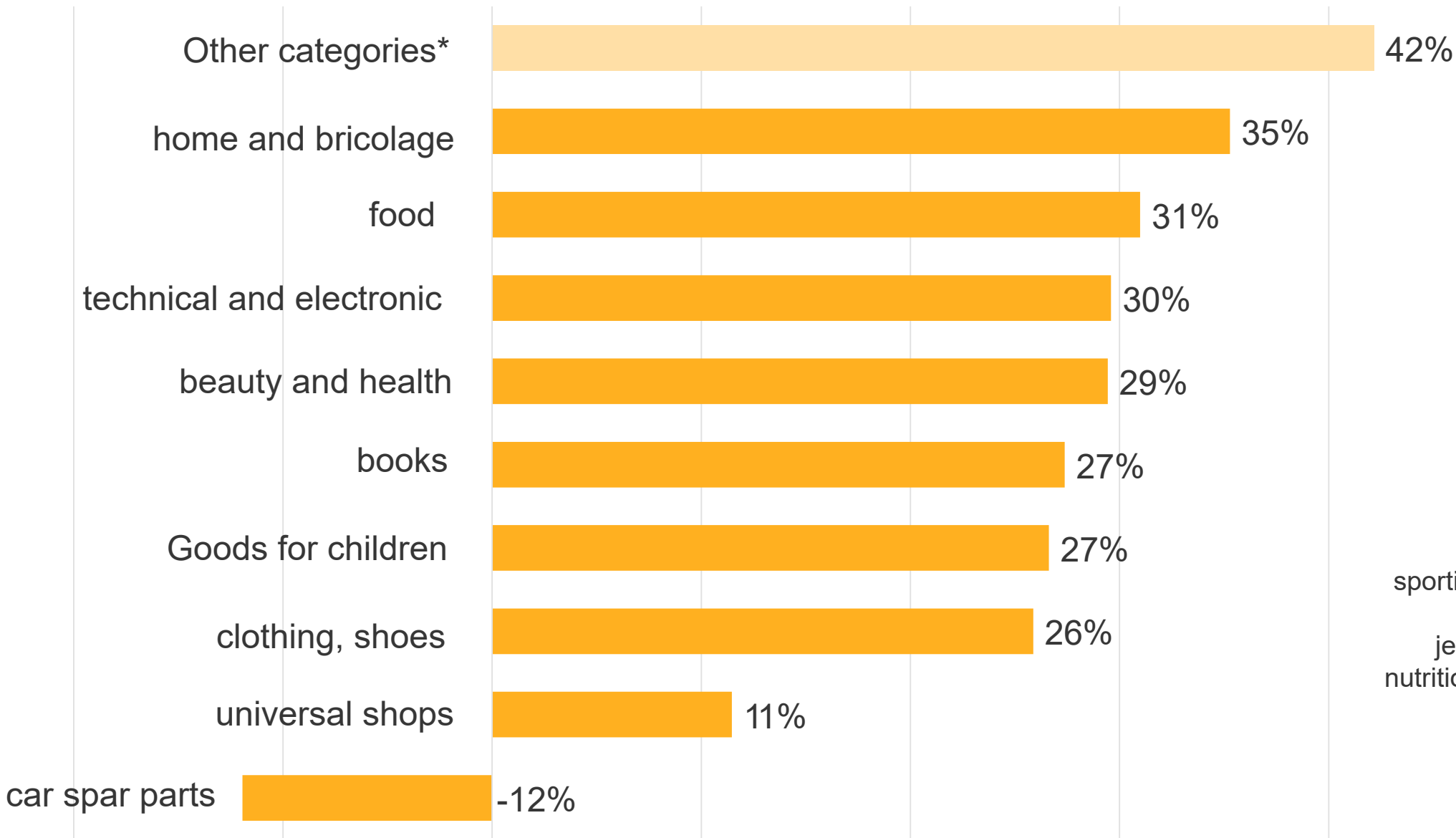Online Russia

Types of stores

Graph of online sales by categories (research conducted on top 300 online stores).

- ■ technical and electronic
- ■ clothing, shoes
- ■ universal shops
- ■ home and bricolage
- ■ car spare parts
- ■ beauty and health
- ■ books
- ■ Goods for children
- ■ food
- ■ other categories

27%
21%
18%
11%
6%
4%
4%
4%
3%
2%
4%

Online Russia
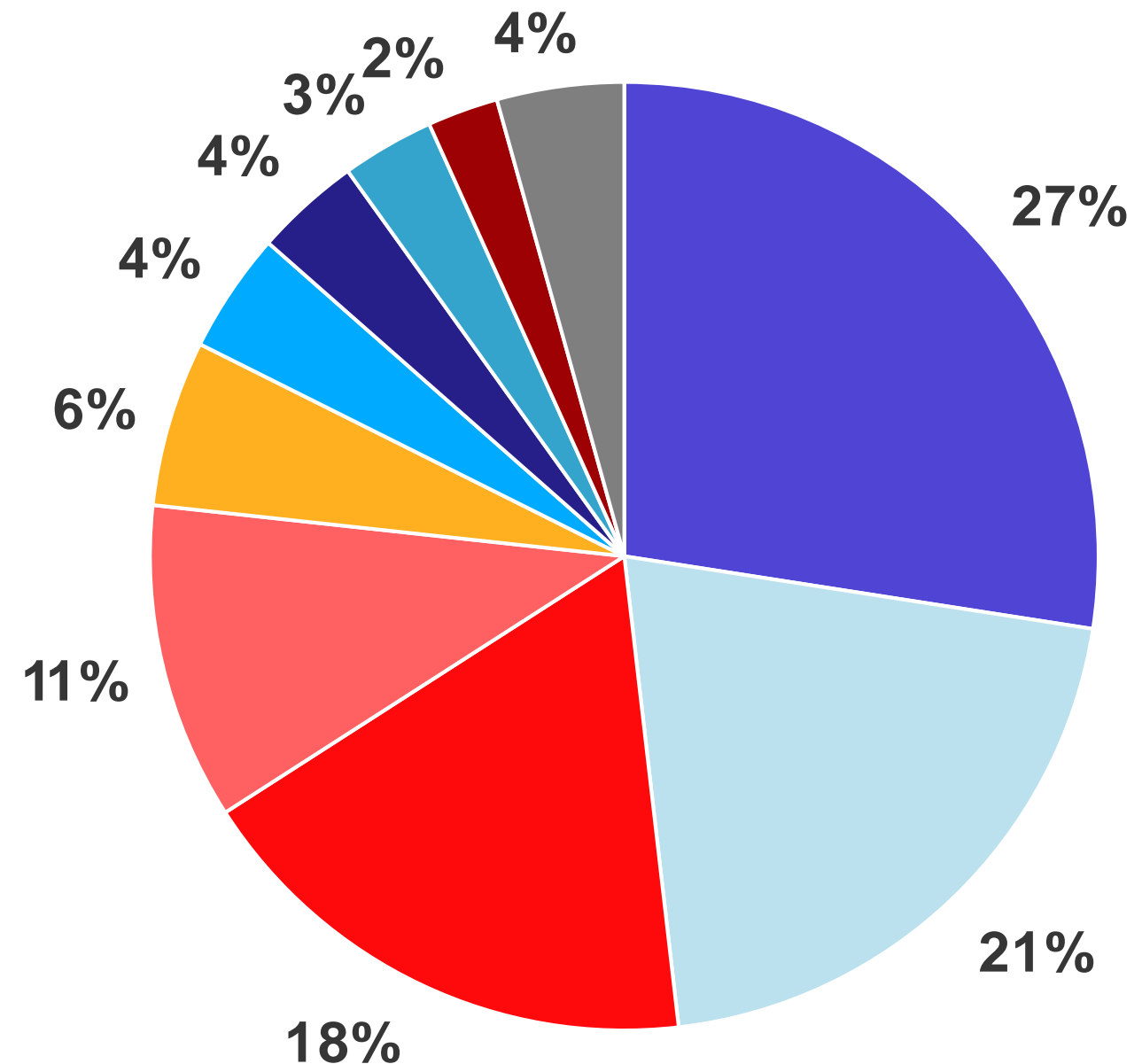
Growth dynamics by categories

Online sales growth by categories; (research conducted on top 300 online stores).

Category	Growth
Other categories*	42%
home and bricolage	35%
food	31%
technical and electronic	30%
beauty and health	29%
books	27%
Goods for children	27%
clothing, shoes	26%
universal shops	11%
car spar parts	-12%

* - other categories
sporting goods, accessories for pets,
jewelry and watches, sports nutrition, bicycles, weapons and military articles, Touristic services, radio-controlled models, gifts, musical instruments, optics.
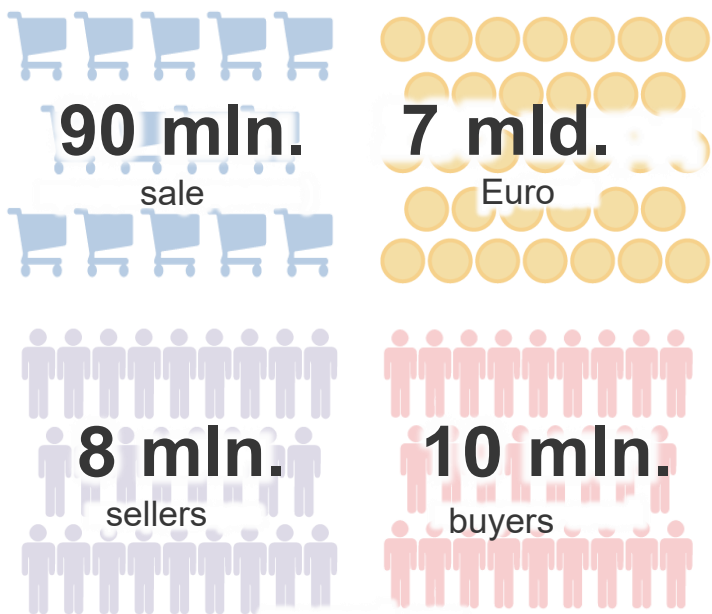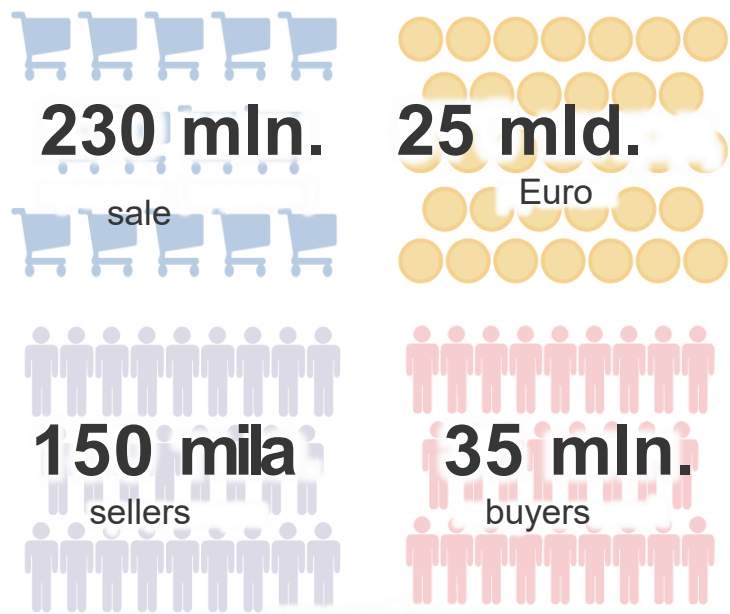
C2C online in Russia

Comparison of online C2C sales economy and e-commerce market

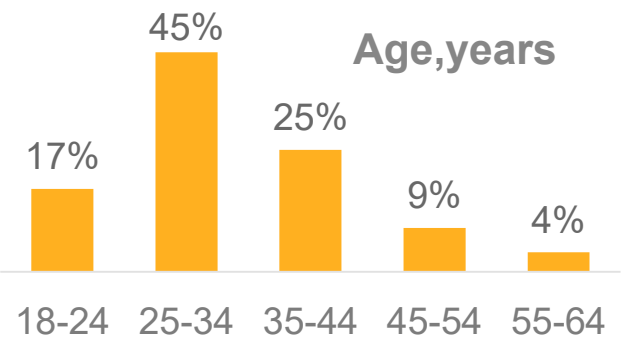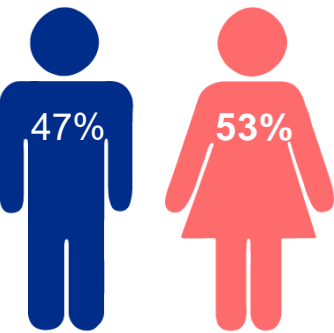2018 - based on data for the first quarter of the year

C2C

90 mln.
sale

7 mld.
Euro

8 mln.
sellers

10 mln.
buyers

B2C

230 mln.
sale

25 mld.
Euro

150 mila
sellers

35 mln.
buyers

Customer profile

47% 53%

Age, years

45%

17% 25%

9%

4%

18-24 25-34 35-44 45-54 55-64

Internet experience

Less than 3 years **4%**

From 3 to 5 years **7%**

From 5 to 7 years **20%**

From 7 to 10 years **28%**

10 to 15 years **27%**

More than 15 **14%**

Income

7%

18%

33%

42%

■ high   ■ Average income
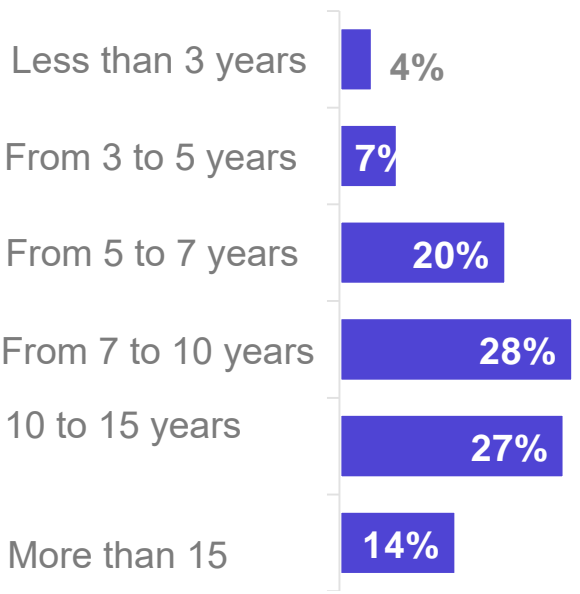■ Medium-high   ■ High income

Almost half - people aged 25 to 34 years.
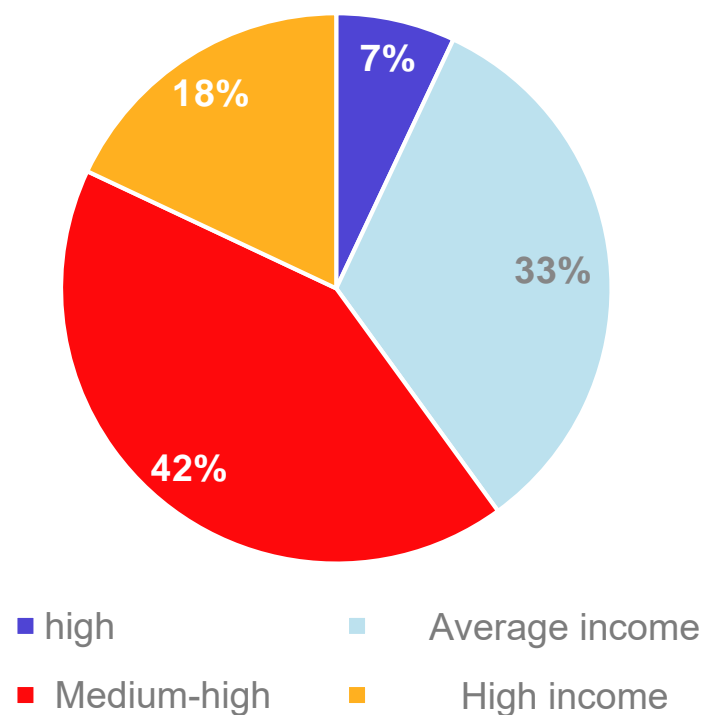
The women are little more than men.

The majority (89%) have been using the internet for more than 5 years.

One-third of buyers have an average income, another 40% is above average. People with low incomes only 7%.
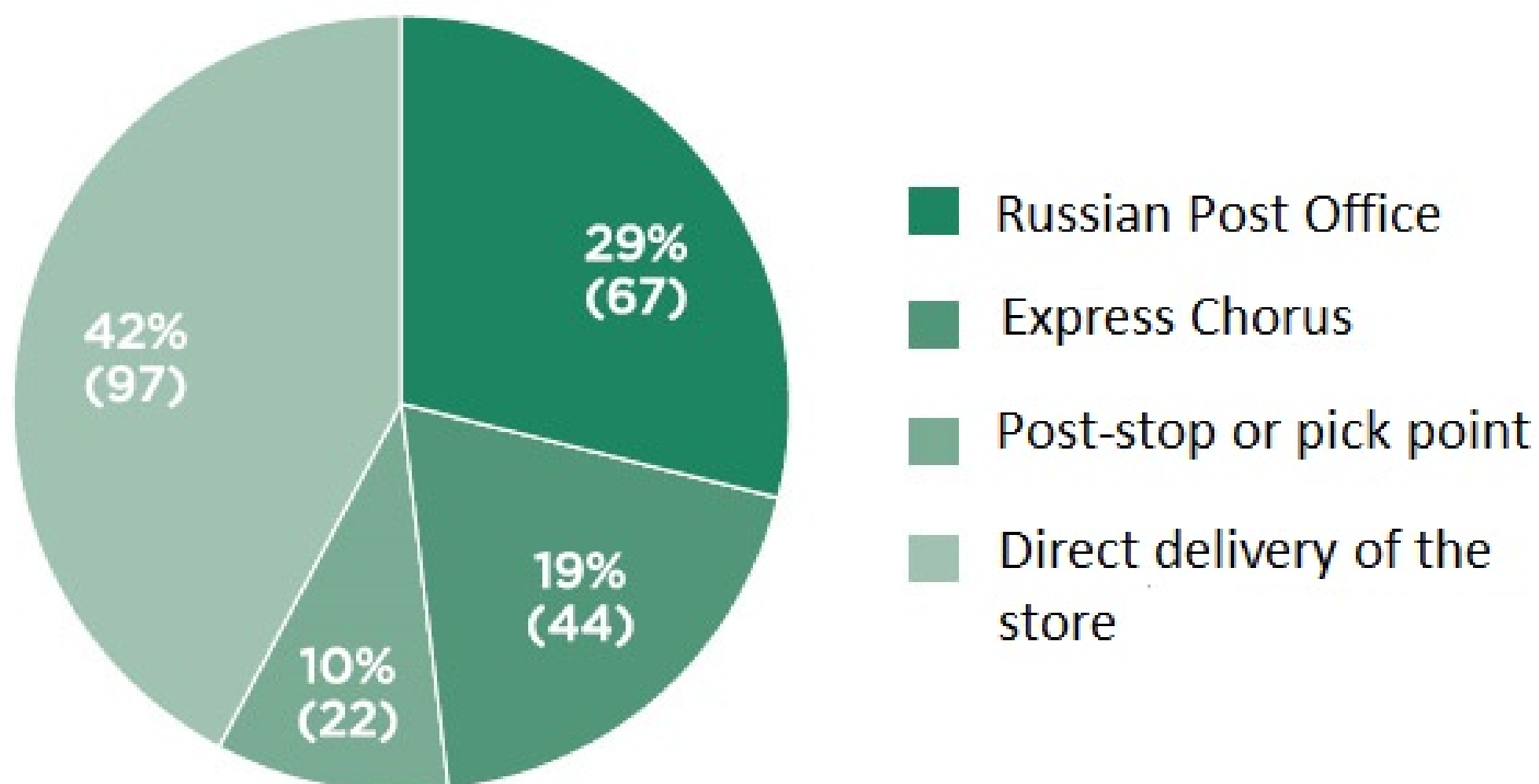
Online survey First quarter data 2018

Online Russia
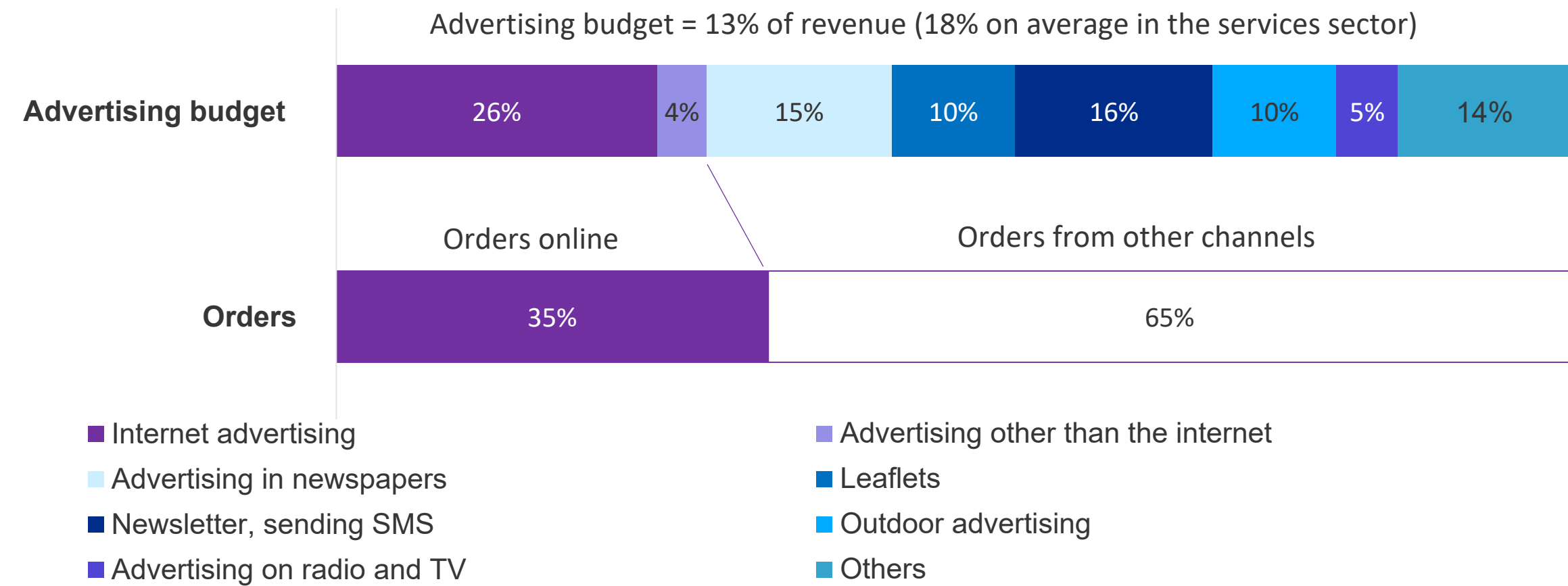
Types of delivery

Division of logistics services for online shops by type of delivery (millions of deliveries)

29% (67)

42% (97)

19% (44)

10% (22)

- Russian Post Office
- Express Chorus
- Post-stop or pick point
- Direct delivery of the store

Online Russia

35% of the revenue is generated from online sales, and 13% from the revenue is invested in advertising

Advertising budget = 13% of revenue (18% on average in the services sector)

Advertising budget	26%	4%	15%	10%	16%	10%	5%	14%

Orders online   Orders from other channels

Orders	35%	65%

- ■ Internet advertising
- ■ Advertising in newspapers
- ■ Newsletter, sending SMS
- ■ Advertising on radio and TV

- ■ Advertising other than the internet
- ■ Leaflets
- ■ Outdoor advertising
- ■ Others

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