



# Facts & figures: ecommerce in Fr

## Supply side

- sales growth
- number of stores

## Demand side

- number of internet users and buyers
- split per age and demographics
- top 15 stores: characteristics

## Focus on textile

- continuous growth
- mail order Companies (still) own the market

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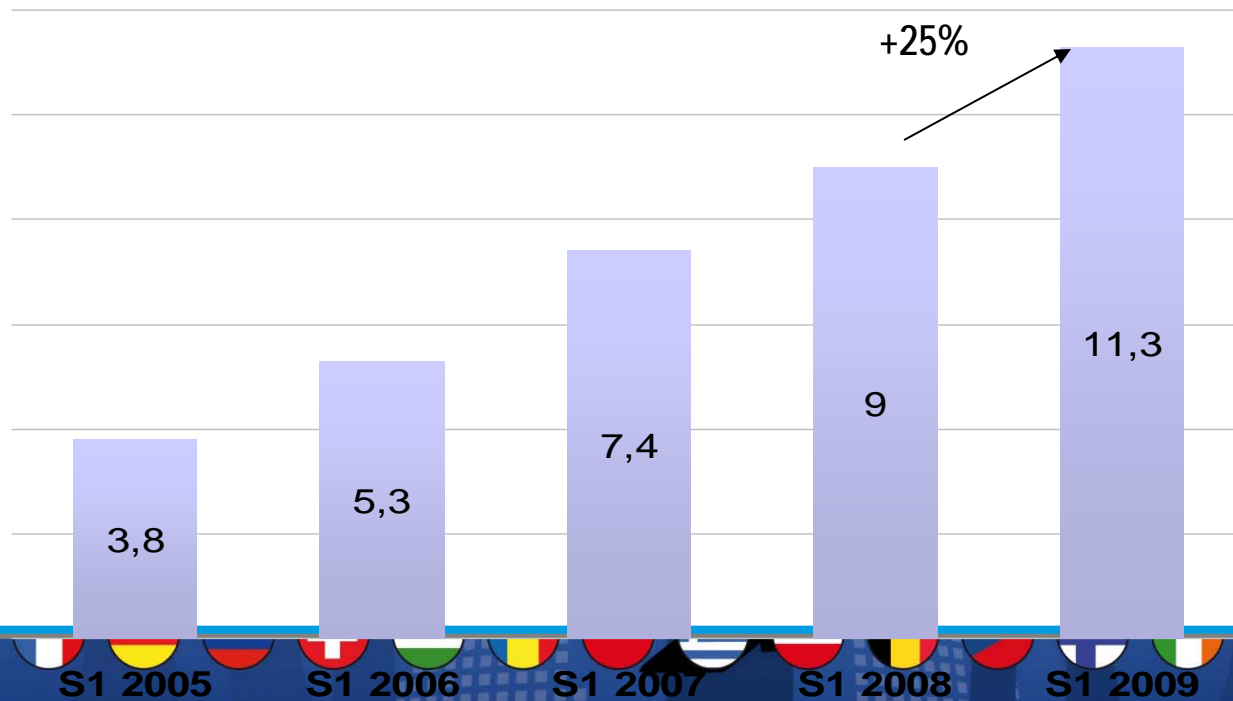
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# E-commerce in France up +25% over S1 2009



Source : Fevad

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but top 35 stores grow « only » +7%

Annual growth %	2008 / 2007	Q1 2009 / Q1 2008	Q2 2009 / Q2 2008	S1 2009 / S1 2008
Total panel iCE 30	16%	7%	7%	7%
iCE 30 BtoC <i>Excl. travel</i>	13%	10%	9%	9%
>> high tech	9%	10%	3%	7%
>> extile	15%	14%	9%	11%
iCE 30 e-travel	20%	4%	6%	5%
iCE 30 BtoB	19%	-2%	-5%	-3%

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Source : ICE / Fevad

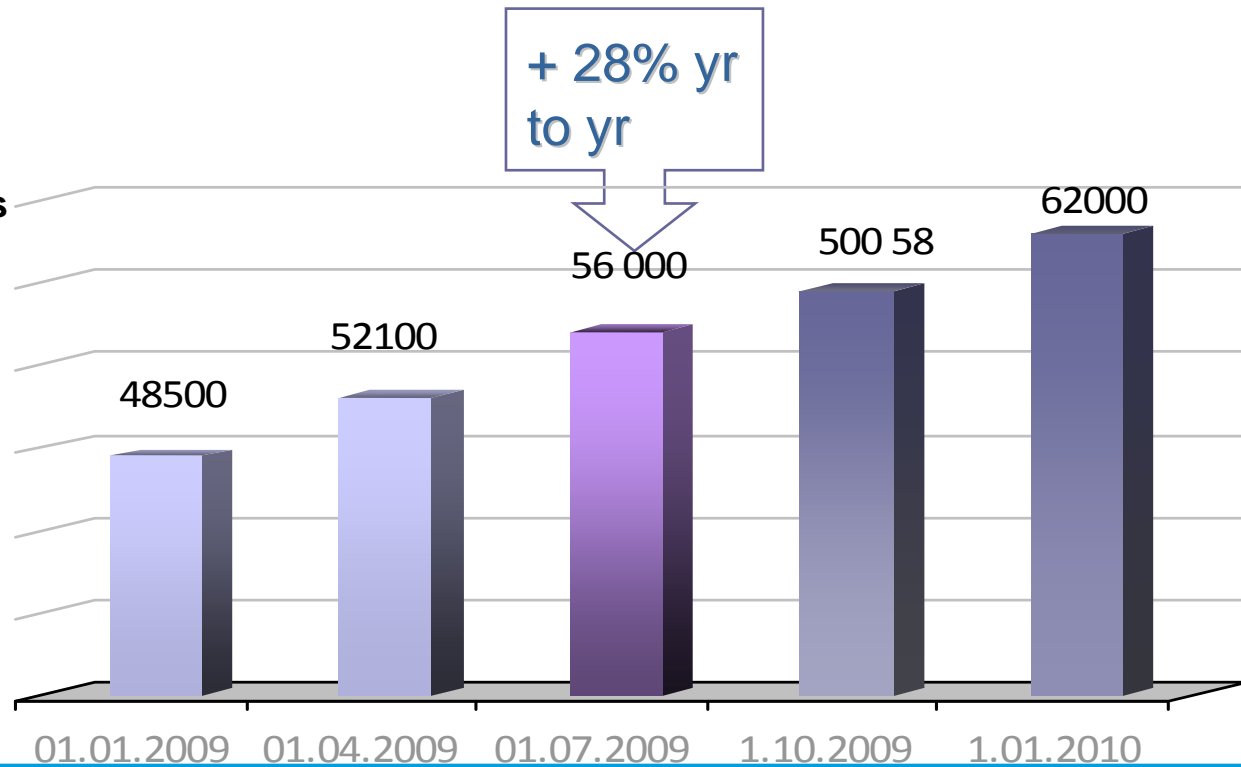
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# 50% of global sales growth is due to new stores

Number of active ecommerce stores



Source : Fevad

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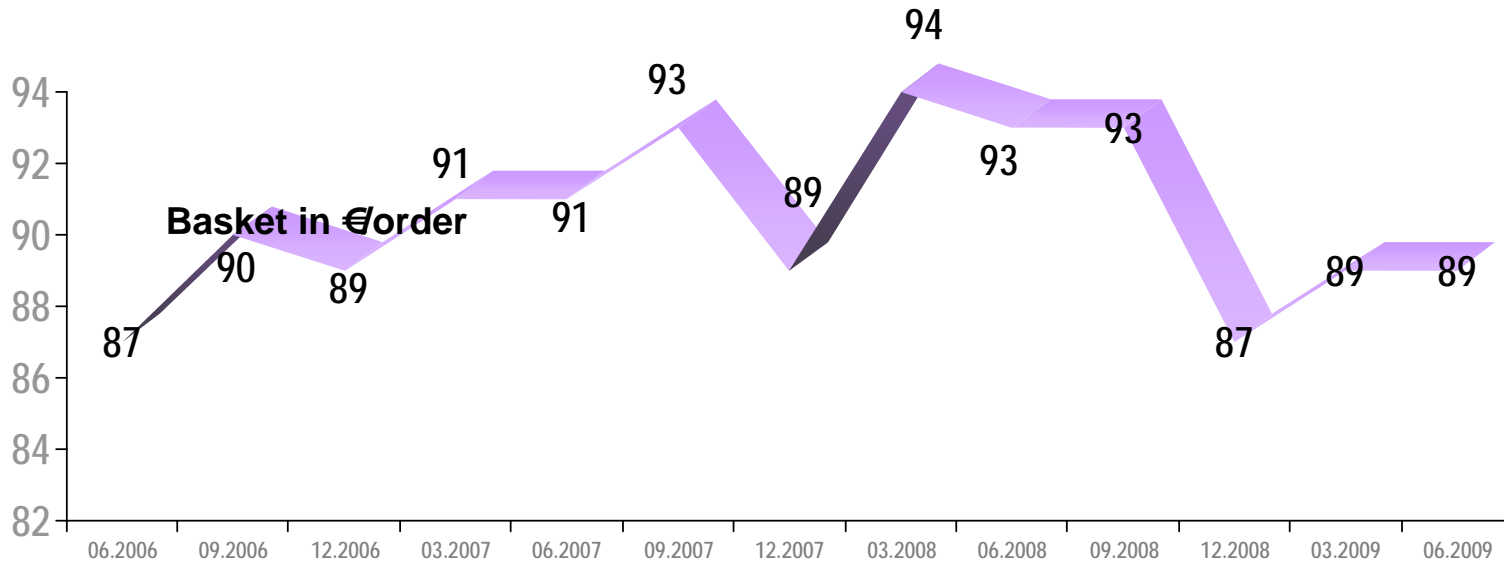
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# average basket down (since T4 '08)



Source : ICE/FEVAD

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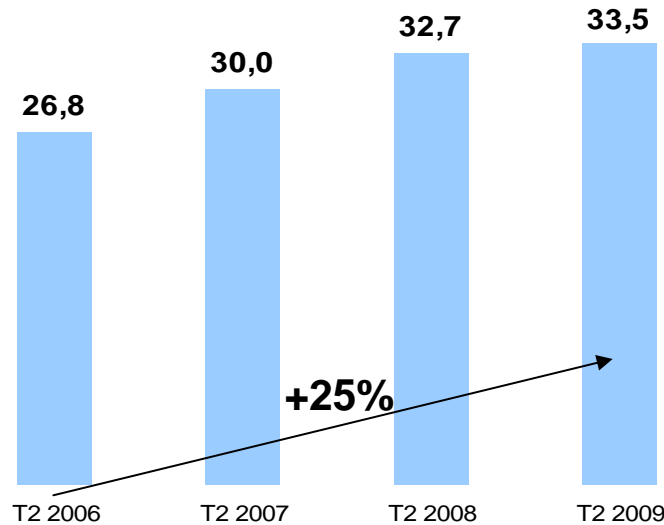


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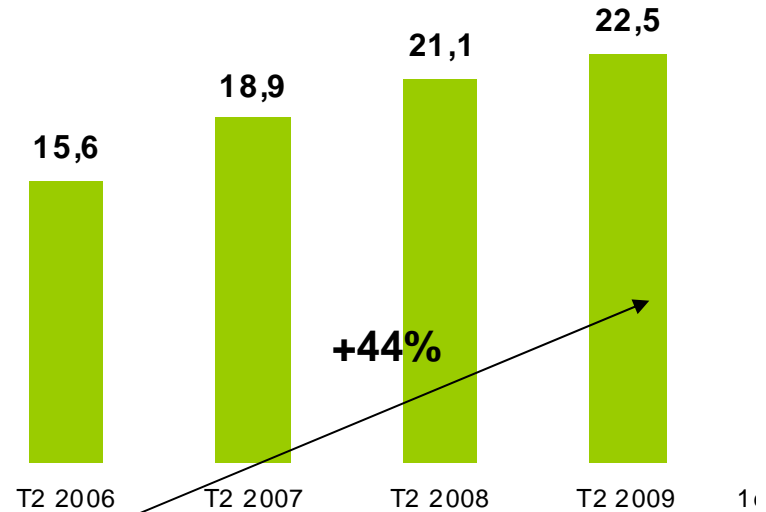


# 33,5 m internet users / 23,5 m buyers

Internet users: + 25% in 3 years



Internet buyers: + 44% in 3 years



Source : Médiamétrie//NetRatings

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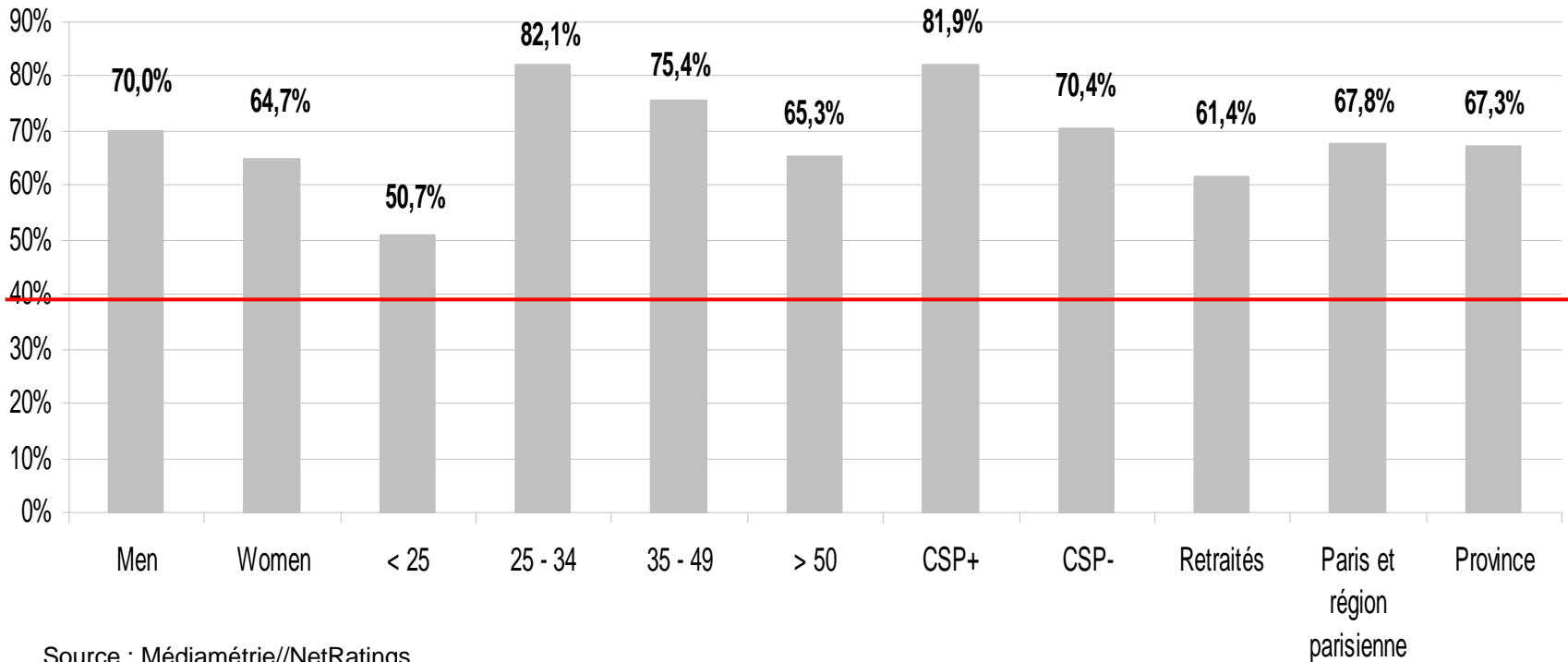
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# 67% of internet users are internet buyers



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# Top 15 French stores: 12 French, 8 Pure Players, only 3 Retail Chains

	Brands <sup>(1)</sup>	Unique Visitors <sup>(2)</sup>	Active Reach <sup>(3)</sup> (%)	Nationality (parent Cy)	type of store
1	eBay *	12 501 000	35,9%	US	PP / C2C
2	PriceMinister *	10 002 000	28,7%	Fr	PP / C2C
3	3 Suisses *	8 347 000	24,0%	Fr	Mail Order
4	Amazon *	7 877 000	22,6%	US	PP
5	La Redoute *	7 519 000	21,6%	Fr	Mail Order
6	Fnac *	7 326 000	21,0%	Fr	Ret
7	Cdiscount *	7 281 000	20,9%	Fr	PP
8	Voyages-Sncf.com *	7 195 000	20,7%	Fr	Travel
9	Vente-privee.com *	5 875 000	16,9%	Fr	PP
10	Kiabi.com *	5 056 000	14,5%	Fr	Ret
11	Pixmania *	4 982 000	14,3%	Fr	PP
12	Rue du Commerce *	4 917 000	14,1%	Fr	PP
13	Carrefour *	4 851 000	13,9%	Fr	Ret
14	Spartoo *	3 897 000	11,2%	Fr	PP
15	Quelle.fr *	3 724 000	10,7%	Germ	MO

Source : Médiamétrie/Netratings

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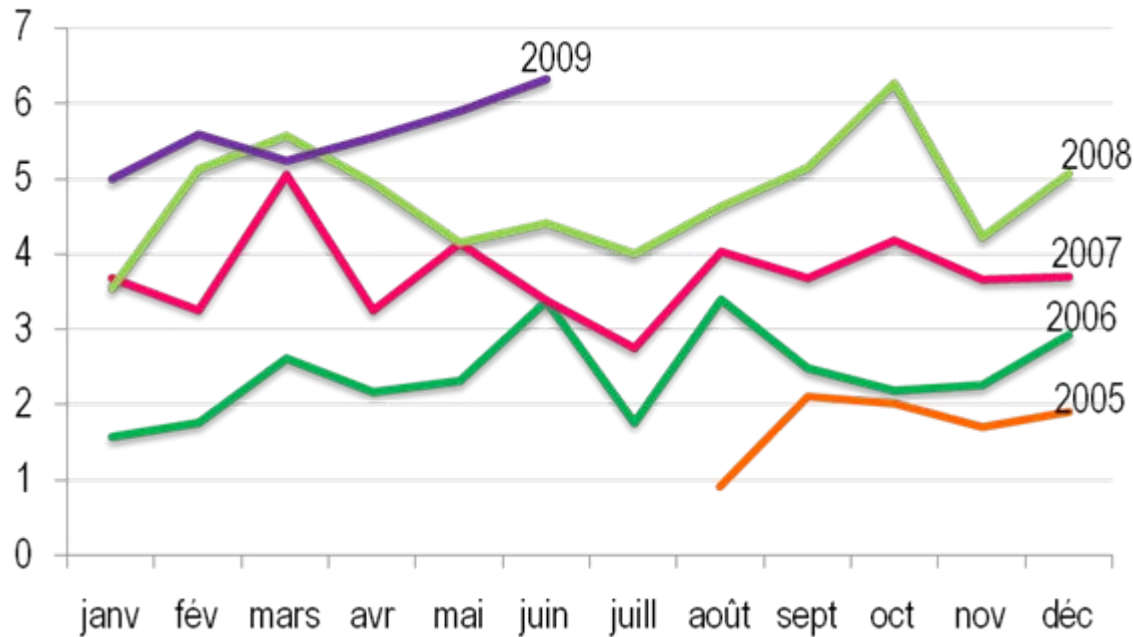
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# Textile internet share of total market: a steady growth up to >6% today



Source : IFM

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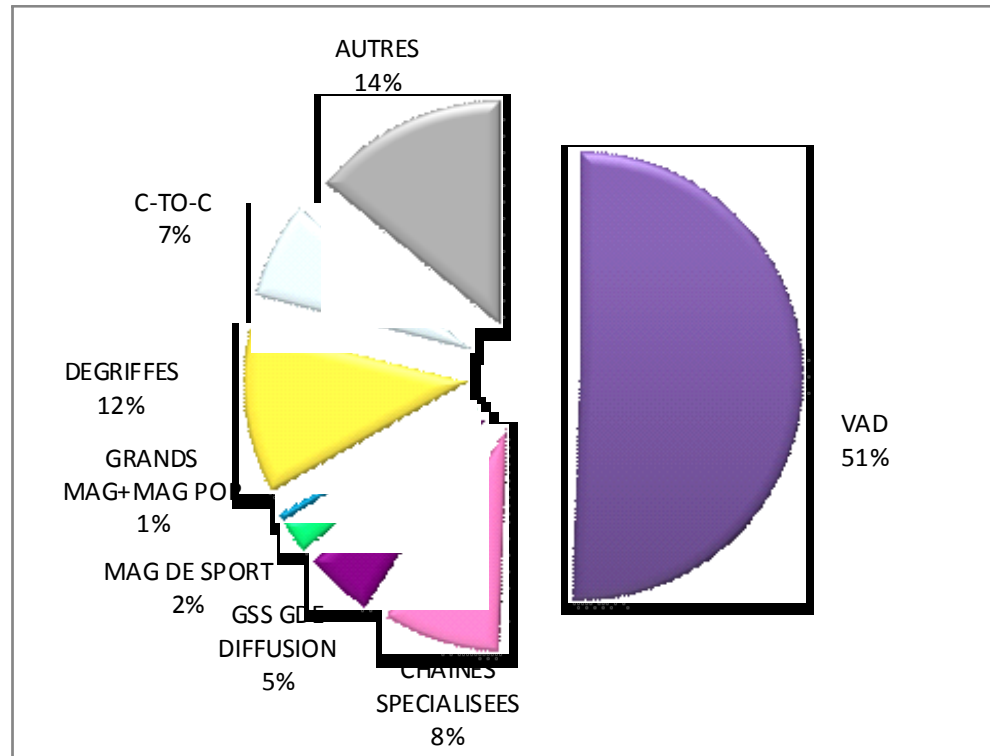


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# Mail Order –textile- Groups still owns 51% of the internet textile market

Jul 08 / jun 09  
textile internet  
Market shares:



Source : IFM

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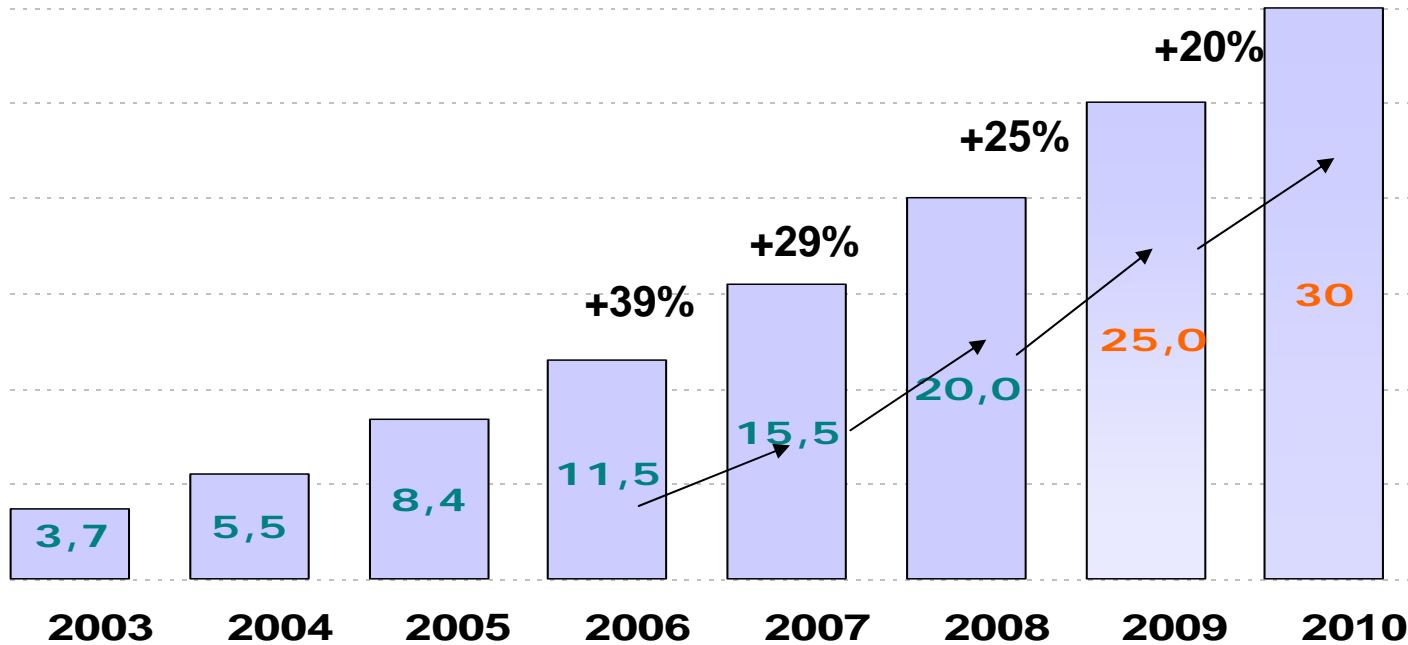


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# Internet sales estimate: € 30 bn in 2010



Source : Bilan e-commerce 2008 Ice/Fevad

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# Thank you!

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