Ministry of Foreign Affairs

E-commerce Italy 2021:
The most promising online sectors & eye-catching developments

Commissioned by the Netherlands Enterprise Agency

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E-commerce Italy 2021:

The most promising online sectors & eye-catching developments

February 2022

This report was commissioned by the Consulate-general of the Kingdom of the Netherlands in Milan

Kingdom of the Netherlands

'Italy offers great cross border e-commerce possibilities for Dutch companies. Don't miss out!'

Olaf Bussink | Team Italia.nl

Jurjen Hallegraeff | Business Expansion.it

This report was commissioned by the Consulate-general of the Kingdom of the Netherlands in Milan

Introduction

February 2022

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Where can we find specific **opportunities** for Dutch e-commerce entrepreneurs in the **Italian** online landscape?

In this research, we give an overview of the **Italian online market** and **developments**. We zoom in to compare different online market **segments** in Italy and their Dutch equivalent. Following, we select in total three online subcategories and three e-commerce developments that show the **most potential** for Dutch companies. We analyze the trends and opportunities to pave the way for **Dutch companies** to make their **first steps** in the Italian market and to expand their online business to Italy.

Benvenuto

Olaf Bussink | Team Italia.nl

Jurjen Hallegraeff | Business Expansion.it

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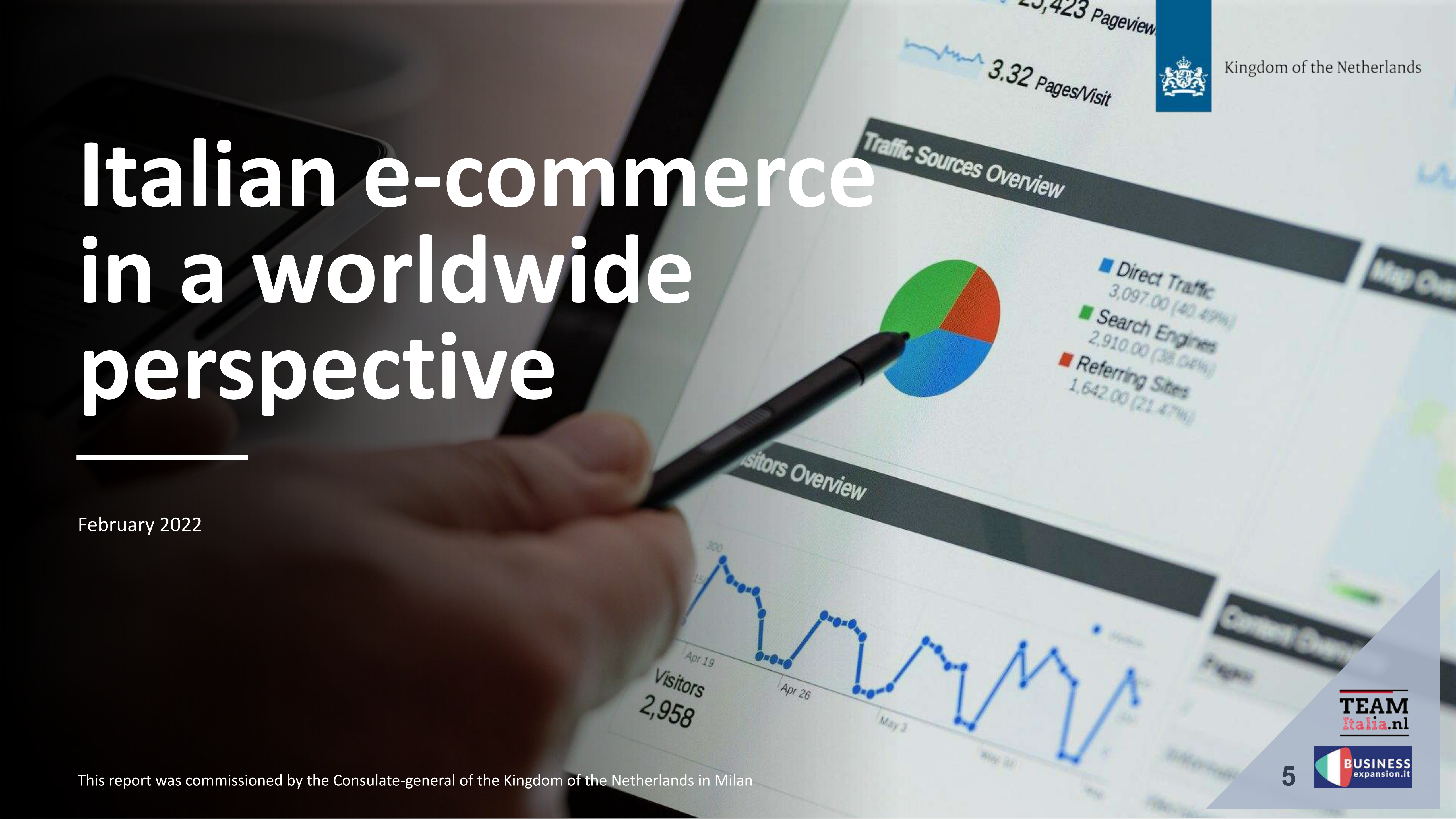
Italian e-commerce in a worldwide perspective

February 2022



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Italian e-commerce in a worldwide perspective

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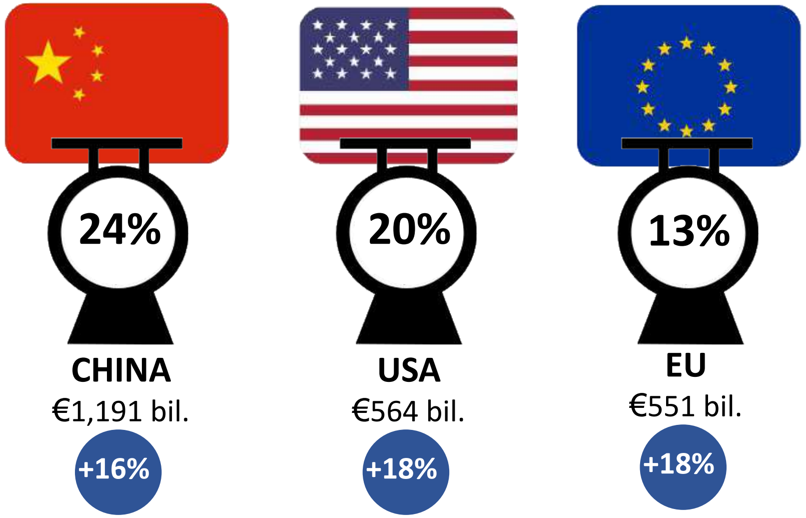
E-commerce worldwide product sales

China has the highest product e-commerce sales penetration worldwide with 24%, that equals **1.191 billion** Euro. This 24% means that of all products sold on the Chinese market, 24% is sold online. USA follows with a product e-commerce penetration of 20% and then Europe with 13%. All three have an average growth rate between 16% and 18% compared to the year before.

(source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results)



Let's clarify some definitions used:

E-commerce sales penetration:

The e-commerce sales penetration is the % of sales that is done through the online channels.

B2C Product sales:

This covers all the sales where a physical product has been shipped to the end customer. If this is not the case, we talk about a service.

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European e-commerce product sales

Looking at Europe there are more differences. The UK has the highest product e-commerce penetration and turnover (23% that equals 93 billion Euro) with an overall growth rate of 15%. Interesting is that also the Netherlands has a high product penetration of 23% with a total of 20 billion Euro turnover and a stunning 43% growth rate compared to the year before. Italy has a lower product e-commerce penetration of 8% with a total turnover of 23,4 billion Euro. With 31% **Italy** has the second **highest online sales growth rate** of Europe.

(source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results)

Country						
E-commerce sales penetration	23%	23%	15%	14%	8%	8%
Country code	UK	NL	DE	FR	IT	ES
Total E-commerce sales of product per year in €	€93 bil.	€20 bil.	€68 bil.	€57 bil.	€23,4 bil.	€16 bil.
The growth of the online sales in 2020	+15%	+43%	+16%	+17%	+31%	+23%

Italian e-commerce in a worldwide perspective

E-commerce product sales in Italy and the Netherlands

When we compare the product sales markets between Italy and the Netherlands, we noticed very significant differences. In Italy only 8% of all products are sold online, which generates an online market of 23,4 billion Euro. In the Netherlands, the total products sold online compared to offline are much higher, with 23%. The generated total online market sales of 20 billion Euro in the Netherlands is still smaller than the online market sales of 23,4 billion Euro in Italy. This is even more remarkable considering the population difference (IT: 60 million people, NL: 17 million people).

At the same time, we see that **both** countries have **extreme growth rate** of products sold online (IT: +31%, NL: +43%).

(source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results)

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INFOGRAPHIC: E-commerce 2020 - Products

E-commerce penetration

	IT	NL
E-commerce penetration	8%	23%
Total e-commerce sales	€23,4 bil.	€20 bil.
Growth	+31%	+43%

Country	CHINA	USA	EU	UK	NL	DE	FR	IT	ES
E-commerce sales penetration	24%	20%	13%	23%	23%	15%	14%	8%	8%
Country code	CHINA	USA	EU	UK	NL	DE	FR	IT	ES
Total E-commerce sales of product per year in €	€1,191 bil.	€564 bil.	€551 bil.	€93 bil.	€20 bil.	€68 bil.	€57 bil.	€23,4 bil.	€16 bil.
The growth of the online sales in 2020	+16%	+18%	+18%	+15%	+43%	+16%	+17%	+31%	+23%

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Italian e-commerce in a worldwide perspective

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INFOGRAPHIC: E-commerce 2021 - Products

Sneak preview 2021 results

IT	E-commerce penetration	NL
10%	%	28%
€30,5 bil.		€25 bil.
+18%		+25%

	CHINA	USA	EU	UK	NL	DE	FR	IT	ES
E-commerce penetration	28%	22%	16%	31%	28%	15%	13%	10%	8%
Value	€1459 bil.	€747 bil.	€736 bil.	€142 bil.	€25 bil.	€73 bil.	€59 bil.	€23,4 bil.	€18 bil.
Growth	+19%	+18%	+13%	+21%	+25%	+8%	+9%	+18%	+0,4%

* *Numbers based on quarterly figueres and expected growth*

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Chapter conclusions

Worldwide e-commerce is developing very rapidly. There are early adopters like the United Kingdom and the Netherlands, and countries that started later and slower like Spain and Italy.

There is no reason to assume that countries that have started later will not go through the same growth development. For Italy we can assume that the Italian product **e-commerce penetration** will **grow to a 25%,** like we have seen in other countries. So there is still a huge e-commerce penetration growth to be made. This will come with numerous business opportunities for Dutch entrepreneurs. This growth to a 25% e-commerce penetration will bring the Italian online market to a stunning size of **74 billion Euro yearly turnover**.

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Zoom out:
Products and Services in the Italian and the Dutch market

February 2022

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Products and services in the IT and NL market

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E-commerce product and services

Before we go into details let's take one step back and also include **services** in our analyses. Doing so this will create a complete picture of the online landscape.

Comparing both markets, we must note that both have experienced a significant growth rate of products sold online (IT: +31%, NL: +43%) and a strong reduction of services sold online (IT: -47%, NL: -39%). Both strong increase and reduction are mainly related to the worldwide pandemic and the restrictions during this period.

In **Italy only 8%** of all **products** are sold online which generates an **online** market of 23,4 billion Euro. The **service** section is smaller and has an online penetration of **11%** of all the services sold in **Italy.** The total of this online service market is 7,2 billion Euro.

In the **Netherlands**, the penetration is very different. The total **products** sold online is higher: **23%**, which generates a total online market of 20 billion Euro. In the **service** section the penetration is extremely high, namely **84%** which represents a market of 6,6 billion Euro.
(source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results)

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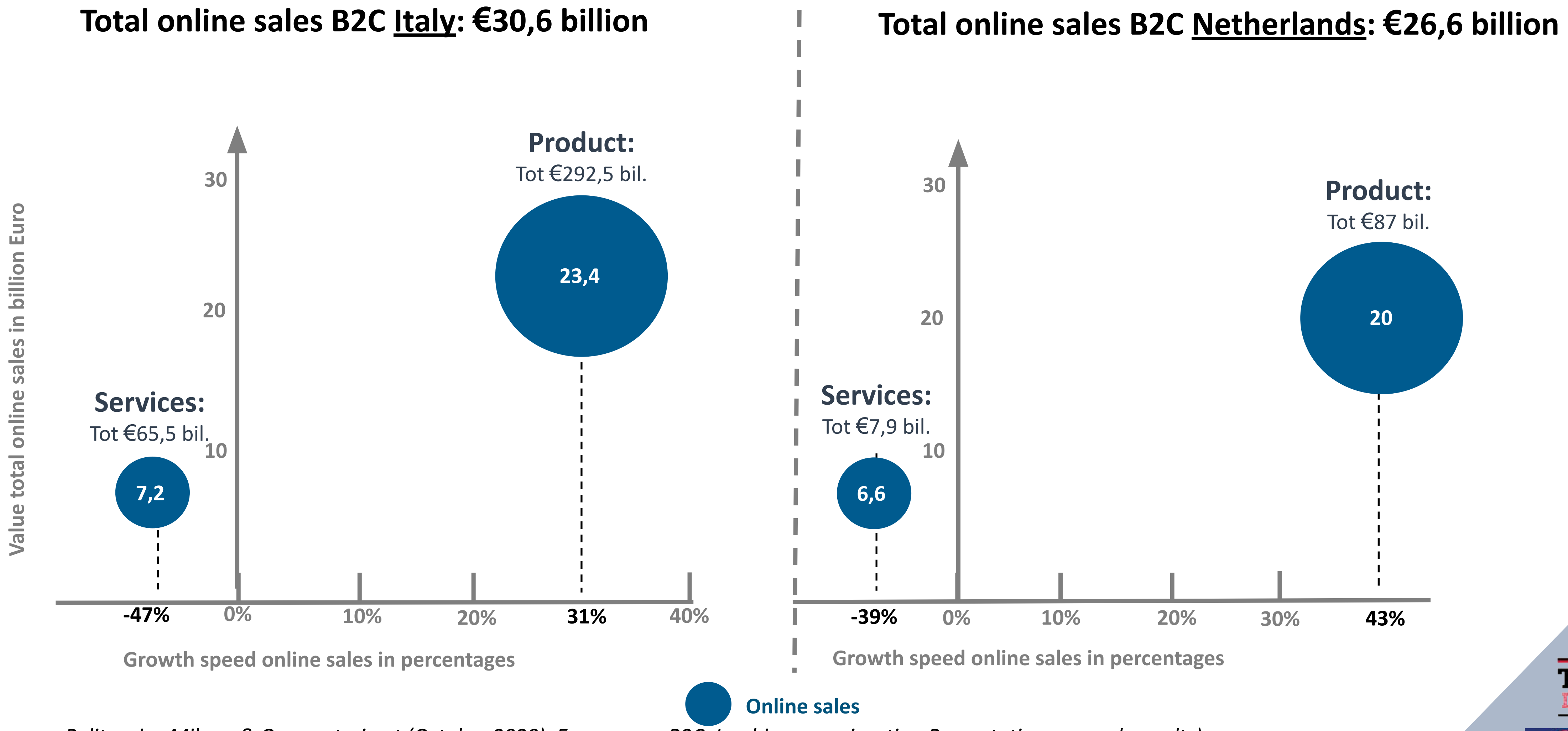
INFOGRAPHIC: E-commerce development 2020: Product and Services



(source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results)

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Dutch cross border e-commerce

Here we analyze the distribution of the **Dutch cross-border spendings** in 2020, so how are the Dutch cross-border purchases distributed over the foreign websites. For example, we notice that of the total cross board purchases on Consumer Electronics, 30% was spent on German websites.

The first clear trend is that geographic locations are the leading element in the purchase choice. The closer the country geographically is to the Netherlands, the more the business it generates (DE, UK, BE and FR). It is very clear that Dutch customers use German website the most. This can also mean that German companies successfully target the Dutch market.

For **Italian** and Spanish websites we noticed a very **low percentage** of Dutch purchases. This is a confirmation that the **Italian online market** is **not mature** yet and that Italian companies are not focussing on the Dutch market.

The three main Italian product categories that are used by Dutch customer are clothes, shoes and food. Here we can assume this is customer request driven sales and less marketing driven.
(source: Thuiswinkel Markt Monitor, 22 july 2020)

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INFOGRAPHIC: Dutch cross-border e-commerce

	DE	UK	FR	BE	CHINA	ES	IT	USA	SCANDIN	OTHER
Consumer Electronics	30%	8%	1%	27%	17%	1%	0%	5%	0%	11%
IT	34%	13%	1%	1%	16%	0%	1%	28%	4%	2%
Household electronics	67%	0%	20%	0%	8%	0%	0%	2%	0%	3%
Clothes	53%	16%	5%	2%	9%	2%	4%	3%	4%	3%
Shoes & Lifestyle	37%	21%	10%	2%	9%	4%	3%	6%	1%	5%
Food & Nearfood	30%	8%	3%	13%	18%	4%	6%	2%	0%	16%
Health & Beauty	30%	18%	6%	12%	13%	1%	1%	8%	2%	10%
Home & Living	57%	9%	4%	4%	9%	1%	0%	1%	5%	10%
DIY/Garden	51%	7%	3%	12%	14%	1%	0%	0%	8%	5%
Media & Entertainment	51%	7%	3%	12%	14%	1%	0%	0%	8%	5%
Toys	16%	15%	0%	9%	34%	1%	3%	10%	4%	8%
Sport & Recreation	52%	10%	2%	0%	7%	0%	0%	23%	0%	5%
Telecom	18%	13%	0%	3%	14%	1%	0%	15%	0%	36%
Other	54%	11%	1%	5%	8%	2%	2%	8%	3%	5%
Packet Tours	14%	11%	4%	0%	0%	7%	4%	13%	4%	44%
Tickets & Accomodation	11%	11%	15%	3%	0%	6%	4%	11%	4%	36%
Tickets for attractions & events	15%	14%	19%	14%	1%	5%	2%	5%	6%	19%

Guide: % of the total cross border e-commerce sales from Dutch companies in the specific country

Already significantly present in the Italians E-commerce market

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Products and services in the IT and NL market

Chapter conclusions

In both the product and service market we see that the **Netherlands** has a much **higher e-commerce penetration**. Considering the **absolute numbers** the markets are very **comparable** in size. The main difference being the bigger population of Italy (60M) compared to the Netherlands (17M).

This is why the **Italian market** is so interesting for Dutch e-commerce entrepreneurs. When the market will reach the Dutch penetration levels, there is still **50 billion Euro** product sales in the market open **to be divided**.

Talking about the online service market the potential upside is even bigger with a gap of 73% penetration to be closed (IT: 11% online service penetration, NL: 84%).

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Zoom in:
Sector comparison IT and NL

February 2022

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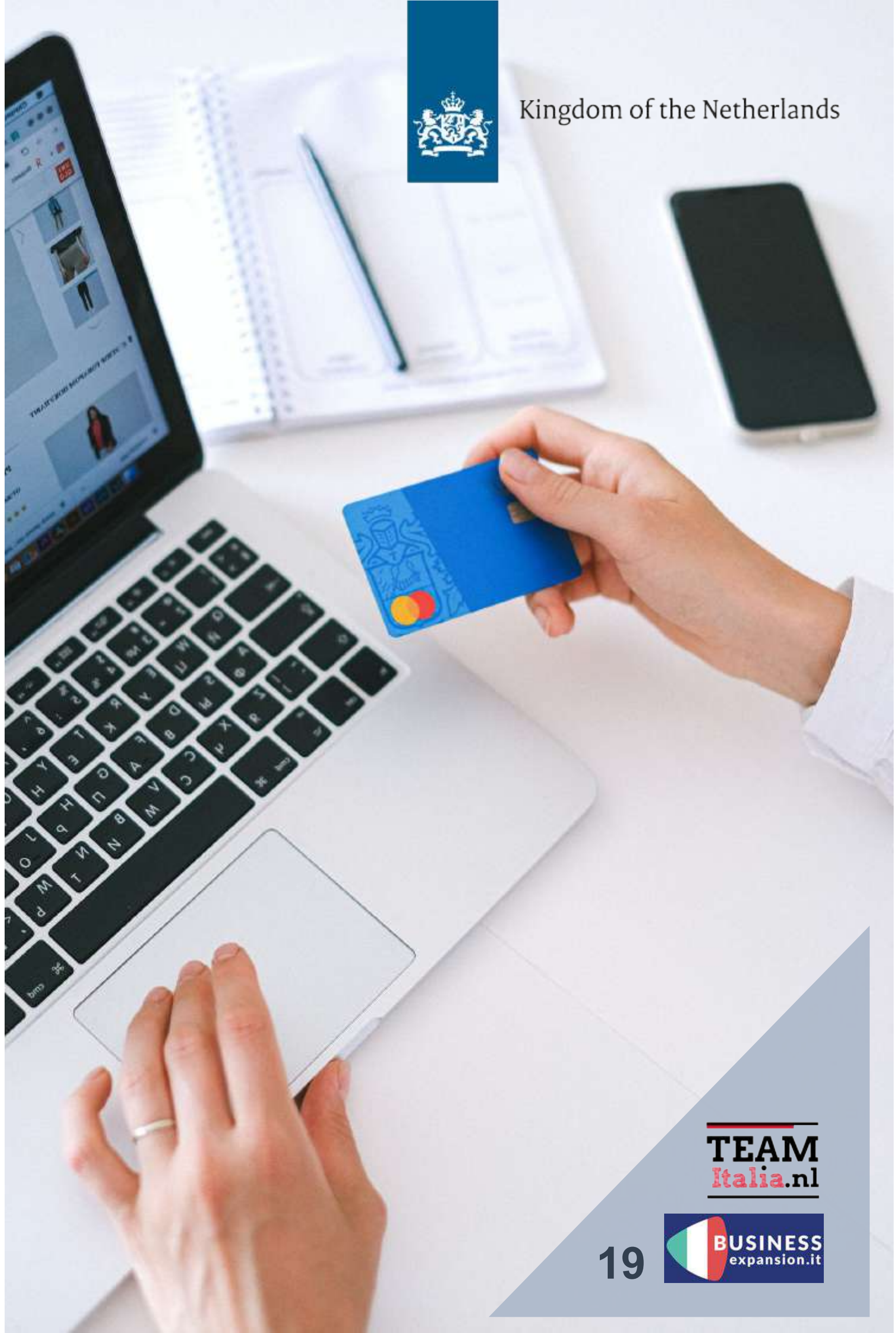
Introduction

In this chapter we will analyze **six segments** (Clothing and Fashion, Electronic and Informatica, Home and Living, Food and Grocery, Books and Children's toys, Others) in which the Italian and Dutch online market for products can be divided. We give a clear insight for each sector considering the total market size, the online sales, the online penetration and the growth.

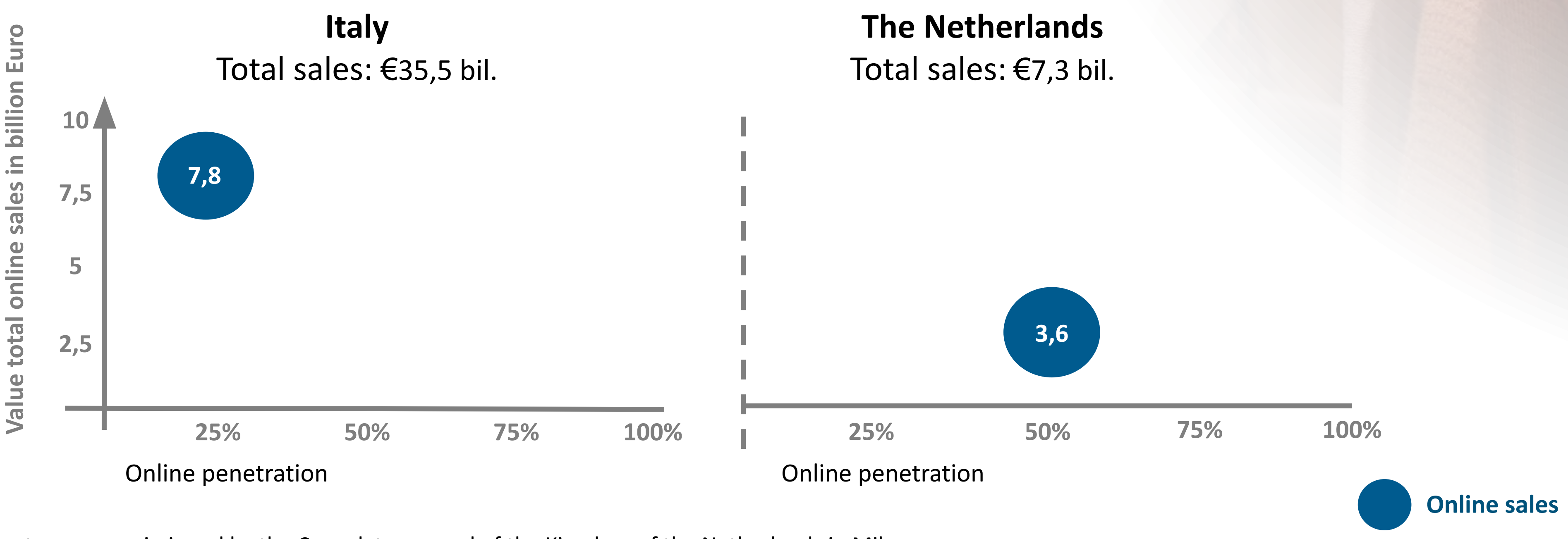
This information will help to give a good and balanced picture of the **potential** of the different **sectors** and helps to better understand the online markets.

This knowledge will lead to a choice for an in-depth analyses of three subsegments.



Clothing and Fashion

The turnover of the **'Clothing and Fashion'** industry is significantly **higher** in **Italy** (35,5 billion Euro). Italians and tourists spend much more on 'Clothing and Fashion' then the Dutch (7,3 billion Euro). The online penetration is **only 22% in Italy** what indicates that a very big growth of online sales is still expected. Taking these two factors into account this is a sector with a short-term online growth **potential** that equals **10 billion Euro** (growth from 22% to 49% penetration). Looking for Dutch potential we will zoom in to the niche: **High-end fashion and Design**, made in Italy (p.43).



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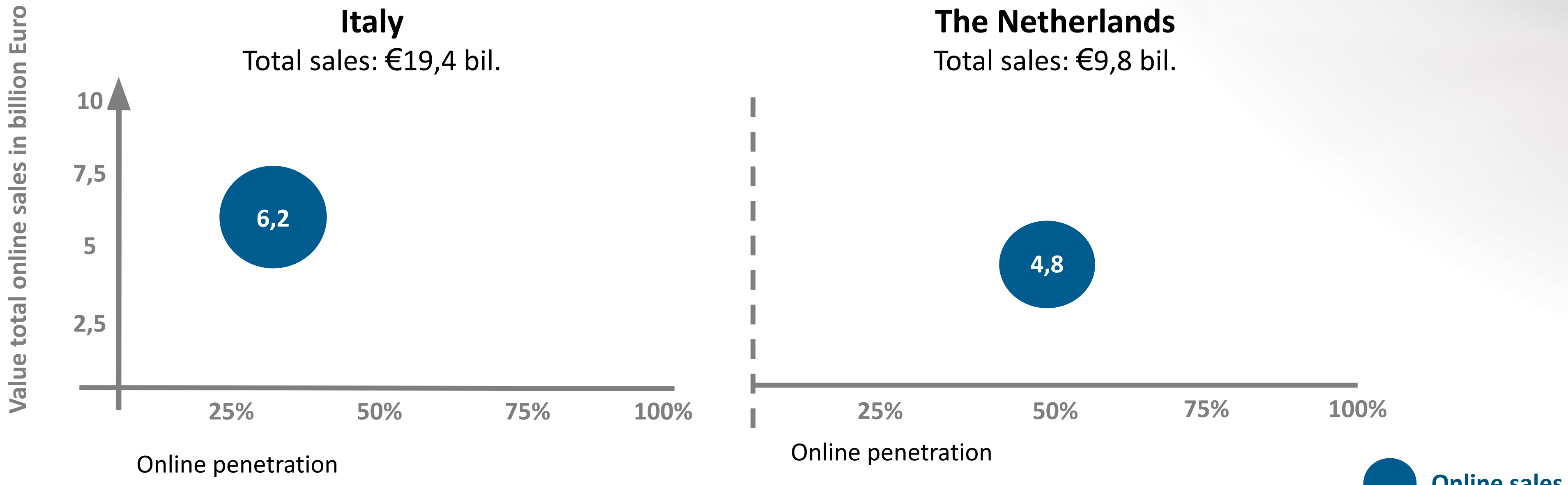
Consumer electronic

The Consumer Electronic is already a **relatively mature** sector. Seeing a **32%** penetration in **Italy** and a 49% in the Netherlands, it shows that Italy already has passed the first phase of growth. The total turnover of the segment, 19 billion Euro in Italy and 10 billion Euro in the Netherlands, are relatively in line with the population difference. Of course, there are interesting niche sectors that have not been explored. For example; the **E-bike sector** still has a very **low online penetration**. Our advice is to future investigate this niche sector: E-bikes.



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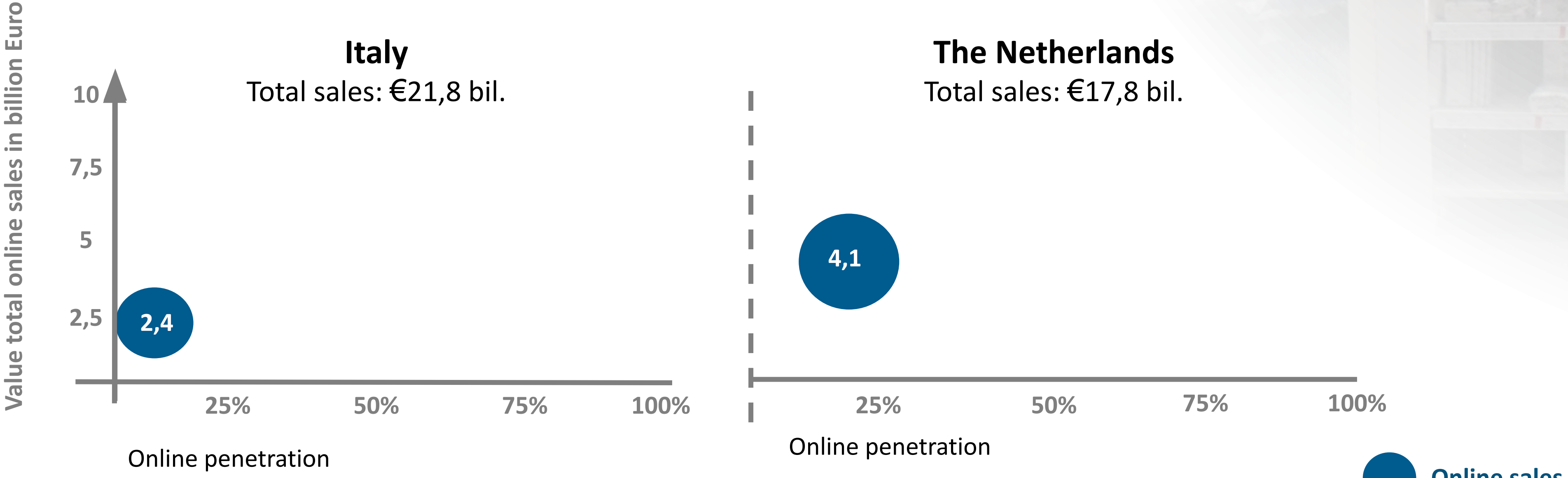
Home and Garden

Here we touch a sector **‘Home and Garden’** that in general is still in his **adolescence phase** online: 11% (IT) and 23% (NL) penetration online. In both the countries the market is still learning to find the right fit for the online channel. It is maybe not the biggest sector with 23 billion Euro (IT) and 17 billion Euro (NL) total turnover but the **potential** of **growth** in online penetration is **enormous**. So, the one who will find here the right solution or niche can be the market winner. A Dutch winner can come out of the niche **‘Flower and Plants’**. We see here significant potential and will investigate further. (p.40)



Sector comparison IT and NL

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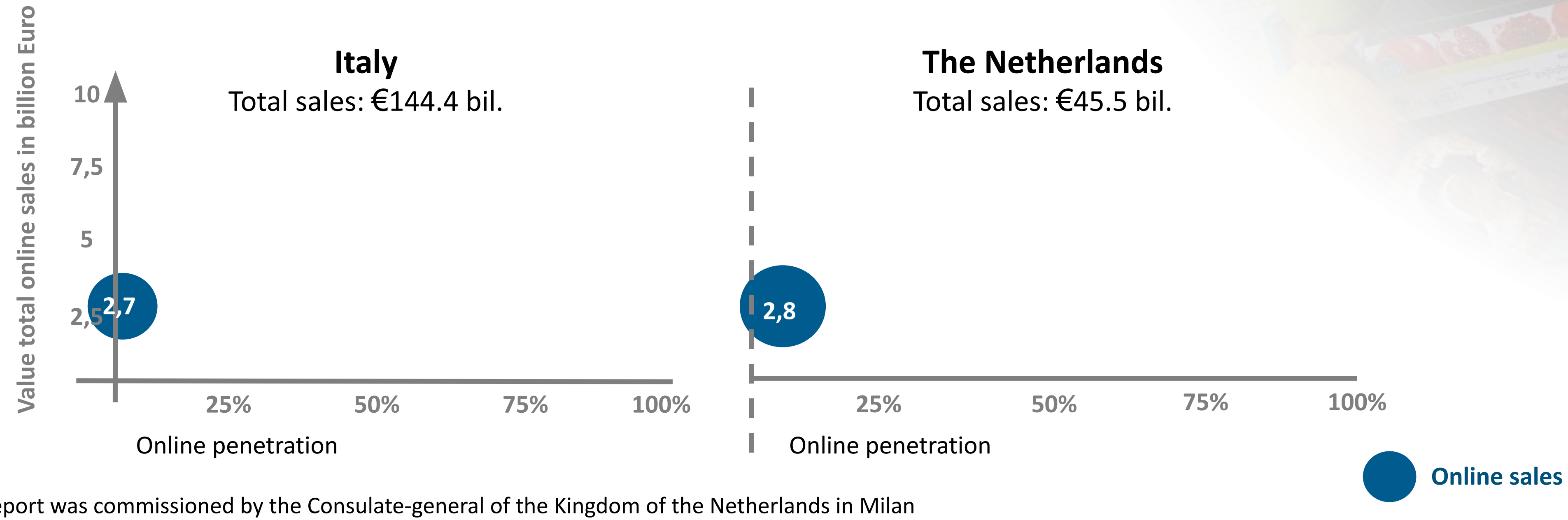
Food and Grocery

Of course, the sector **'Food and Grocery'** has unlimited possibilities because of the total size of the sector 144.4 (IT) and 45.5 (NL) billion Euro turnover. We see that the **total size** in **Italy** is a bit **higher** than the population difference would **predict**. Here of course the Italian kitchen, culture and the brand 'made in Italy' play a part. In a country where food and the quality of food are so important the online channel needs to overperform to persuade people to move to the online channel. For cross-border e-commerce this **sector** is a bit more **challenging** due to local regulation, distribution and fresh products. We believe it is very important and **promising** to look for a niche in the **supporting industry** of this sector: Warehousing and delivery methods and technology.



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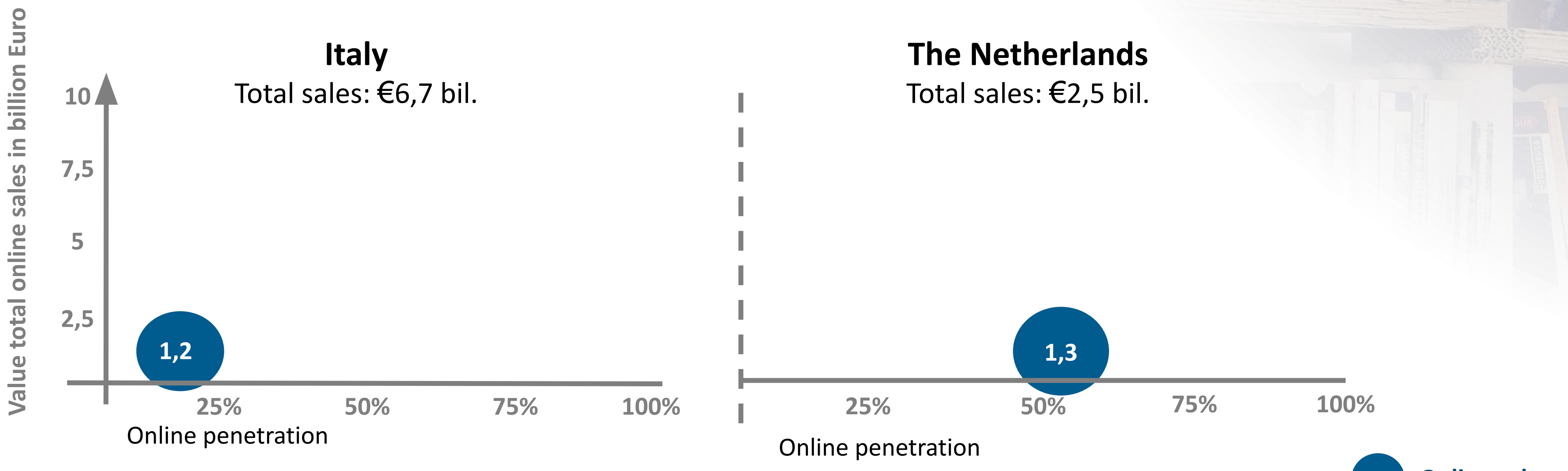
Books and Children's toys

'Books and Children's toys' is a relatively small sector. It is very interesting to see the differences in this sector between the countries. In the Netherlands this was one of the first sectors to go dominantly online with Bol.com. This has led to a 53% online penetration. In Italy we see that the online penetration it still just 18%. 'Books and Children's toys' are a **traditional sector** in the Italian culture. Book stores & toys shops still have a dominant place in the shopping streets. The five billion turnover of this sector is very interesting for Dutch entrepreneurs. For example, a focus on the niche: **ecological children's toys** can be interesting as the switch from plastic toys to sustainable toys is growing rapidly in Italy.



Sector comparison IT and NL

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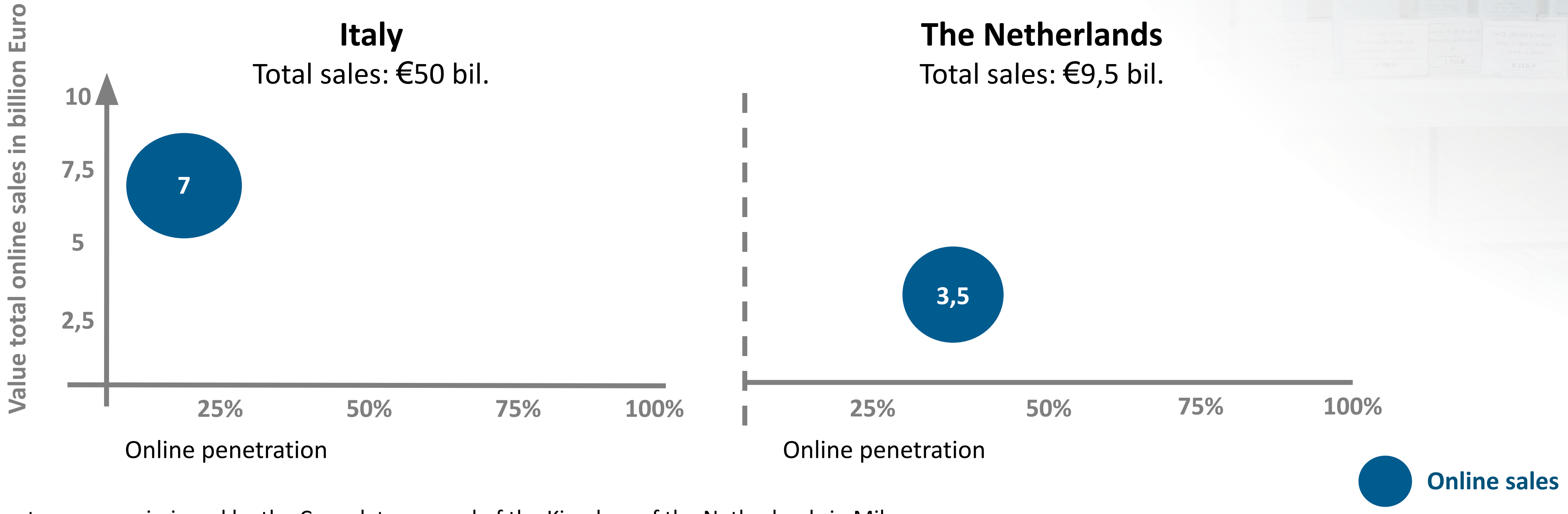
Others

Within developing markets the category **‘Others’** is relatively a big segment and a bit harder to analyze. The difference in total turnover of this segment between Italy (50 billion Euro) and the Netherlands (10 billion Euro) is partly because of the bigger population but depends also on definitions. We believe that 14% (IT) versus 37% (NL) gives a **correct picture** of the current online maturity of the markets.

A very interesting niche sector in ‘Others’ is the **‘Cosmetics and Skincare’** subsector. We will have a closer look into this niche in the chapter ‘In depth: subsectors’. (p.46)



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Zoom in:
online developments

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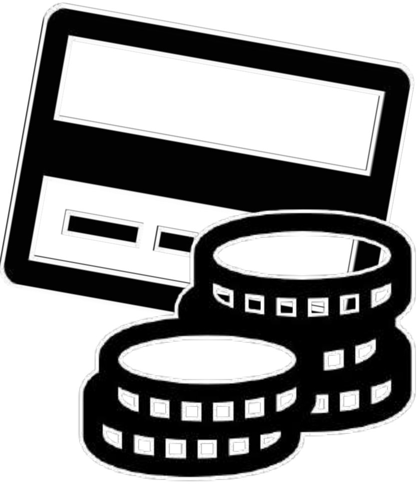

Online payment solutions

The Netherlands is one of the **early adapters** in online payment methods. Early on Dutch online customers have accepted the online payment method iDeal together with other solutions like credit cards, PayPal, Tikkie and Pay Later.

There are only **a few companies** that offer payment solutions in Italy. The most important solutions are Credit Cards, Stripe, Nexi and PayPal. Alternative payment solutions are growing fast such as Satispay and Klarna Pay Later.
(source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report)
(source: J. Hallegraeff (February 2021). Finding e-commerce opportunities for Dutch companies in Italy. Embassy and the Consulate-General of the Netherlands in Italy.)

Opportunities:
Companies in the Netherlands have gathered a lot of experience in online payment solutions over the years. The Italian market is following a few years later in this development in a slightly different market landscape that shows a lot of potential. This topic needs to be investigated in more detail.

AI and e-commerce solutions

A total of **45% of the bigger companies in the Netherlands** (>500 employees) are using AI in their business processes in 2019. The most popular solutions are Machine Learning, Automatization and Data Analytics.

In 2020 over 78% of these larger companies have chosen for a chat solution on their website that includes another person on the other side, **22% of the companies** have chosen for a visual chatbot.
(source: www.cbs.nl/nl-nl/nieuws/2021/41/bijna-helft-grote-bedrijven-gebruikt-artificial-intelligence - 15 October 2021)

In 2020 the total value of the AI business in Italy was estimated to be over 300 million Euros, this is a 15% growth compared to one year earlier. **61% of the large sized companies** have implemented an AI solution and **21% of the medium sized companies**. Due to the Pandemic the budget of most companies has decreased for AI solutions, however the market continues to grow due to the number of new companies entering the market.
(source: https://blog.osservatori.net/it_it/artificial-intelligence-italia-mercato-progetti-tecnologie - March 2021)

Opportunities

The market of Artificial Intelligence (AI) is in the early stages of growth and is showing a lot of potential for future growth. The development is very international driven and at this moment is mostly interesting for larger sized companies for analytics and to automate their processes. As the market will continue to grow in the future, the price of entry and investments will drop and Small and Medium Sized Enterprises (SME) will be able to enter too. For now, we note this development and we hope to investigate this subject in the short future.

Last mile delivery

Companies in the Netherlands are well developed on the last mile delivery such as bicycle couriers and software solutions. Dutch companies have an increased knowledge on **locker delivery solutions** for the first and most important, the second attempt delivery. This market is not stabilized for now, there are quite some new start-up companies, including branded and white-label lockers in every city.

(source: Market research: Finding e-commerce opportunities for Dutch companies in Italy - 2021)
(source: ACM Market study last-mile delivery 2020)

Italian customers mainly prefer to receive their parcel **at home**. Nonetheless, couriers are heavily investing in locker and click-and-collect solutions to solve the second attempt delivery issues.

In Italy there are several last mile delivery solutions that are in a startup phase but are looking promising, such as Glovo, PonyU, Milkman and Tannico Express. It is not to underestimate that **smaller e-commerce shops are struggling** to compete with the bigger e-commerce stores, especially on the last mile delivery. Often parcels arrive too late, delivery is too expensive and the second attempt delivery is not fulfilling.

(source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results
(source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report

Opportunities:

In Italy there are several last mile delivery solutions that are in a startup phase and are looking very promising. Some examples are: Glovo, PonyU, Milkman and Tannico Express. Dutch entrepreneurs can collaborate or start their own business in Italy. It's not to underestimate that smaller e-commerce shops are struggling to compete with the bigger e-commerce stores, especially on the last mile delivery. Often parcels arrive too late, delivery is too expensive and the second attempt delivery is not fulfilling.

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Online marketplaces

The most important marketplaces in the Netherlands are Bol.com, CoolBlue and Marktplaats. The Netherlands has around 250 marketplaces in total, interesting is that Amazon is not the biggest at the moment.
(source: www.emerce.nl/nieuws/marketplaces-for-brands-al-250-marktplaatsen-nederland)

In Italy Amazon is by far the leading marketplace with **38% of the market share**. Followed by Ebay, Subito.it & Facebook. It is important to realize the dominance of Amazon in the Italian market. This offers great possibilities to enter the market fast and strong in cooperation with them. At the same time it makes it hard to compete if you choose a different channel strategy. Other International players in the market are: Zalando, IBS, Etsy, Asos, ManoMano, Privalia, Alibaba.
(source: www.statista.com/statistics/1120558/)

The most important marketplace that is founded in Italy is **E-Price.it**. They launched in 2015 and are by far the most dominant local player. Also Subito.it is considered as a strong Italian player but it is owned by Swedes Schibsted. Marketplaces like Japal (EaaS) and Everli.com have grown very fast.
(source: https://ecommercenews.eu/italian-online-retailer-eprice-opens-marketplace-to-european-merchants/)

Of Italian online companies **45%** makes use of marketplaces. Of the users 65% makes use of more than one marketplace. In Italy 49% of the marketplace users depend for more than 25% of their turnover on the marketplaces.
(source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report

Opportunities:
Italian online consumers love to use online marketplaces for their purchases. The main reasons are ease of use and strong pricing. Due to the experience of Dutch companies in marketplaces, they can easily transform this and expand this to the Italian market. This is a very interesting development that needs more investigation, however we have found other developments even more interesting for now.

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Online customer experience

The online customer experience is a developing process. Important stakeholders expect this development to become one of the most **important trends.** The final customer will experience the online shopping personalized up to every detail. It will almost be as you are shopping in real time in the store, but now online. Here you can think of the use of avatars, personal shopping assistants, virtual showrooms and product suggestions based on your interest, past purchases, location and climate.

In Italy the customer experience is also a topic high on the agenda of online companies, especially of the larger ones. Budget has been made available to implement AI solutions, including **personalized customer experience solutions.**

(source: J. Hallegraeff (February 2021). Finding e-commerce opportunities for Dutch companies in Italy. Embassy and the Consulate-General of the Netherlands in Italy.)

(source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report

Opportunities:

It is expected that online customer experience will develop substantially in the future and will be personalized to every single customer. For now it's not clear how this will happen, to what extend and when it will take place. For this reason we will note this development and would love to investigate this development in the near future.

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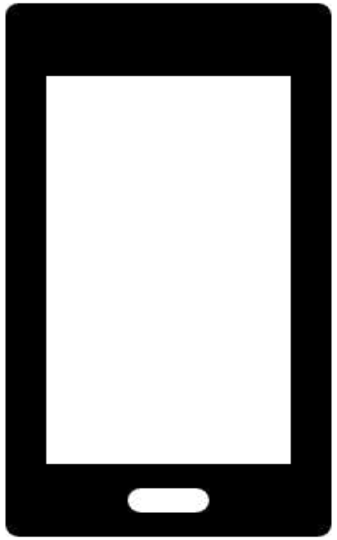
Online sustainability

In the Netherlands sustainable and ethical commerce will become more important in the near future. Online customers want to **feel good** about the product they just bought.

Many Italian e-consumers (86%) indicated that they are **worried about sustainability** and 79% prefer sustainable packages for their e-commerce orders. Interestingly, only 21% is willing to pay extra for sustainable packaging.

Examples of these possibilities are: green energy for warehousing, recycling of materials, CO2 neutral delivery, the use of biodegradable products, recycled packaging and sponsoring green and sustainable local projects.
(source: J. Hallegraeff (February 2021). Finding e-commerce opportunities for Dutch companies in Italy. Embassy and the Consulate-General of the Netherlands in Italy.)

Opportunities:
The sustainability trend is developing fast on online e-commerce. Customers are conscious about the environment and they expect to have an online offer based on these preferences. This international trend is happening in both Italy and in the Netherlands and we will investigate this industry in more detail on p.54 of this research.



Mobile

Interesting is to see that there is a **huge difference** between the mobile purchases in the Netherlands and Italy. Last year the mobile purchases in the **Netherlands** grew 11% to 5,1 billion Euros, that represents **19%** of all online orders.

However, in **Italy** the online mobile purchases has grown by 22% to 15,7 billion Euros, that represents a **stunning 51%** of all purchases online.
(source: www.emerce.nl/nieuws/ecommerce-nederland-coronajaar-266-miljard-euro – March 2021)

Opportunities:
The reason for this difference is speculated for now. It might come from the limited access of Italians to PC or laptops. But it could also be related to the improved mobile pages over the past years and the habit of Dutch online customers to purchase via PC or laptop. We will investigate this development in more detail on p.52 of this research.

INFOGRAPHIC: Mobile 2020

Italy

€15,7 bil. mobile turnover

+22%

growth compared to the previous year

€2,6 bil.	€13,1 bil.
SERVICES	PRODUCTS

Mobile orders of total: 51%

SERVICES: 36%

PRODUCTS: 54%

Netherlands

€5,1 bil. mobile turnover

+11%

growth compared to the previous year

€1,3 bil.*	€3,8 bil.*
SERVICES	PRODUCTS

Mobile orders of total: 19%

SERVICES: **%

PRODUCTS: **%

*Assumption based on the distribution of the total online volume

** percentage unknown

Source: https://www.emerce.nl/nieuws/ecommerce-nederland-coronajaar-266-miljard-euro

Kingdom of the Netherlands

Conclusions:
results market overview

February 2022

Conclusions: results market overview

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Chapter conclusions: subsectors

There are **many great opportunities** for Dutch companies in Italy. Based on the first more general research (part A) we have selected three main industries and three important online developments to investigate in more detail.

The first sub-sectors we want to research in more detail is the **Flower and Plants** industry. The main industry of Home and Living has experienced a strong growth in the last year. The subsector: Flower and Plants is showing quite a few opportunities for Dutch companies in Italy.

The second subsector we will research is **High-end fashion and Design**. This industry shows a lot of potential and the online penetration in Italy is only 22%. This is quite low compared to the Netherlands and other online developed countries.

The last subsector we will research is **Cosmetics and Skin care**. The industry is a dominant industry in Italy and has experienced a huge transformation to online in the last year. Interesting is that the online penetration of this market is still low with only 14%.

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Conclusions: results market overview

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Chapter conclusions: online developments

The first online development we will research in more detail is the **digital payment industry**. This market is highly developed in the Netherlands and the Italian equivalent is still years behind. Further investigation is needed to understand this market in more detail.

The second online development we will research is the **use of mobile**. It's known that the mobile is the preferred device for quick research online and now in Italy over 50% of all the online purchases is done by a smartphone.

The last online development we will research is **online sustainability**. Different from the other trends is that this development is more demand driven. The need for sustainable products and services is high and companies need to adapt to this request with high urgency.

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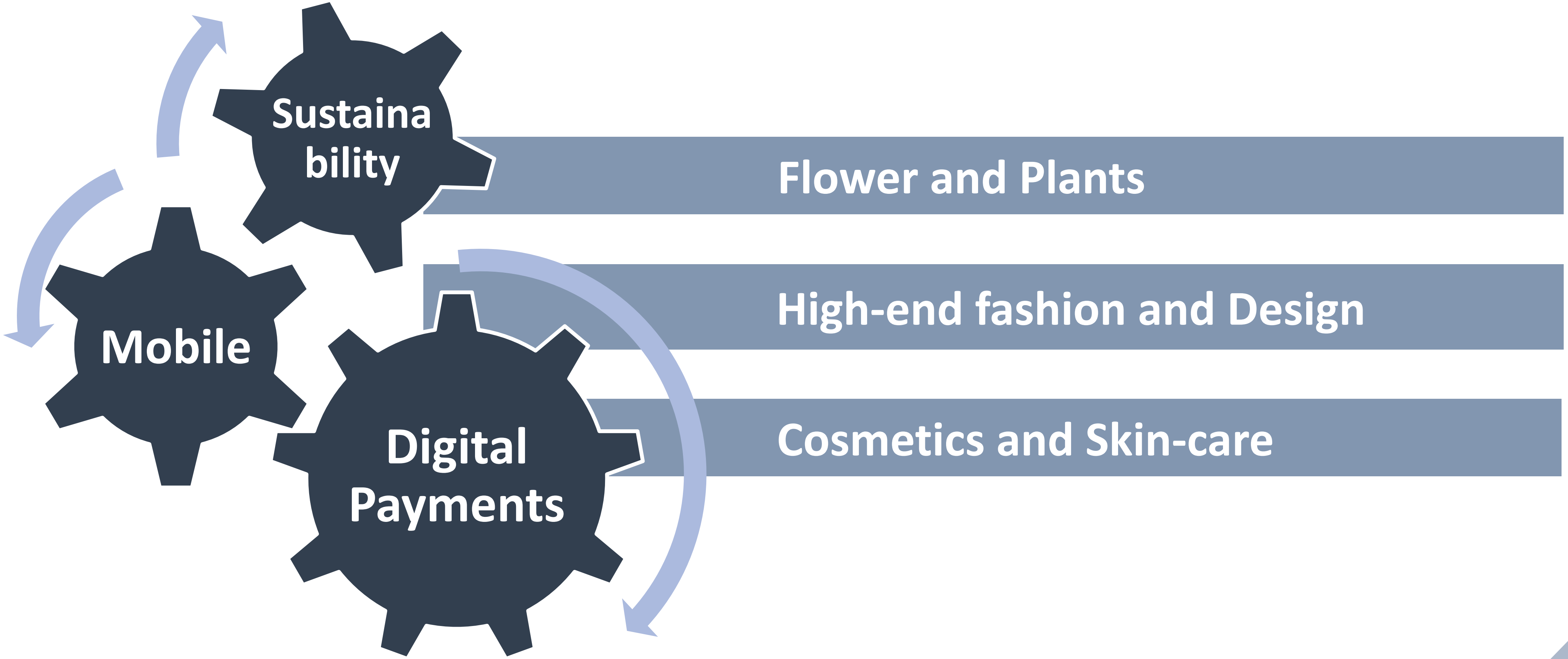
Next steps

We will do an in-depth research from two different viewpoints. We advise **three specific subsectors** and **three e-commerce developments** for future investigation. Our conclusion is that they have high potentials for Dutch companies based on the data and information we analyzed.



In depth:
subsectors

February 2022

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Flowers and Plants

Zooming in on the subsector **'Flowers and Plants'** we see very interesting developments in the Italian market, especially in the online market. Italians who are **active** in green and gardening grew by **25%** from 16 to 20 million people in 2020. After the pandemic we are expecting this number to settle around 17 million Italians.

Internet is the primary source of **information** in the purchasing phase of Flower and Plants after 'word of mouth' and advice from friends and family members.

The majority of the Italian millennials buys flowers multiple times a year. Of this group 70% buys flowers two to four times a year.
(source: *E-commerce e gardening; EimaDigital Preview, Nomisma 2020, Fiori e piante: i millennial italiani 2019)*

The **size** of the Flowers and Plant market in Italy is **€2.6 billion**, with a 7% turnover growth in 2020.

In 2019 **2,9%** of the turnover of this sector was **online**. We see a **200% online sales increase** in 2020.
In the Netherlands it is a market of €1,6 Billion of which 12% is sold online.
(source: *www.emerce.nl/nieuws/aandeel-online-bloemenverkoop-gegroeid-43-procent-2016-5-procent-2019)*

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Conclusion: Flowers and Plants

We conclude that the Flower and Plants subsegment is in a very positive flow. The amount of people 'interested and active' has grown strongly with 25%. The complete sector turnover has grown with 7% to a market size of €2,6 billion. This combined with the current 'green' sentiments shows that the future horizon is very positive. This brings us to the conclusion that the Flower and Plants sub-segment is **stable and growing.**

Zooming in to the online sales, we can conclude that the e-commerce is still in his **unmatured state**. With a penetration of only 2,9% the e-commerce market will explode in the coming years. The product information phase already takes place online. Together with growing interest of younger generations in 'Flower and Plants strongly suggest that 'online' is the future.

One of the main reasons for a low penetration is the lack of online players. So, a higher amount of professional online players can create a strong acceleration.

Opportunities:
Knowing that online often reduces the cost and impact of the 'middlemen', this field can be very interesting for Dutch companies. Especially for those that now travel daily with flowers from NL to IT. Direct sales to the end consumer can have a positive impact on the ecological footprint and the pricing. Especially when you take into account the high prices of flowers in Italy. Also diversifying risk and volume can give extra benefits when you choose to enter a new market with different use of Flowers and Plants (timing, motive and style).

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FACTSHEET Sub-sectors: Flowers and plants

Italy in development

- People active in **green & gardening** increased to 20 million in 2020, this is a **25% growth**;
- Internet is a primary **source of information** in the choice and purchase of flowers and plants;
- Italian **millennials** are used to buy flowers multiple times a year (70% buy 2 to 4 times a year).

Conclusions

- Total sales in sector is growing (7%), market **size is €2.6 Billion;**
- **Online** is more and more the leading channel for **information;**
- **Online market share** for flowers is still relatively small (2,9%)
- Growth of online share is **very fast (200%);**
- Low amount of **dedicated** online **players.**

Local opportunities

- Flowers already travel daily from NL to IT;
- Prices of flowers are much higher in Italy;
- Different use of flowers and plants (timing, motive and style.

source: E-commerce e gardening; EimaDigital Preview, Nomisma 2020, Fiori e piante: i millennial italiani 2019

Italy in numbers

Growth sector

- ✔ Size Flowers and Plant market €2.6 Billion;
- ✔ 20 million persons active in gardening, 25% growth;
- ✔ 7% turnover growth in the overall sector.

Growth e-commerce

- ✔ 2,9% buy their flowers online in 2019;
- ✔ 200% increase in online sales for garden furniture and gardening in 2020.

Details

- ✔ Flowers and Plants are an important sector of Made in Italy, which represents 5% of agricultural production, for an annual value of €2.6 Billion.

Large ecommerce players

- ✔ The colvinco (ES) (https://www.thecolvinco.com/it)

Possible NL players

Bloomon, Hold, Bakker.com, Plantsome, Planten-grow, Perfectplantdeal, Bloembollenkopen.nl

Marketplaces

https://it.yougardener.com/

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High-end fashion and Design

To understand the Italian market of ‘High-end fashion and Design’ we zoom in on the market of ‘Personal Luxury Goods’. The ‘Personal Luxury Goods market contains: leather goods, fashion, watchmaking, jewelry & perfumes.

The total market size of this sub-segment ‘Personal Luxury Goods’ in Italy is €14 Billion, this is 25% of the total Italian market for ‘Luxury goods’ (car, boat, ect).

Italy covers 6,5% of the world sales of ‘Personal Luxury Goods’ with the world market being €220 Billion.

It is important to realize that tourism plays a very significant part in the sales of ‘Personal Luxury Goods’. 60% of all tourism spend goes to ‘Made in Italy’ products.

Looking at the online market, we see a 50% growth of online sales of ‘Personal Luxury Goods’ in 2020. The current e-commerce market has a size of €0,96 Billion in 2020. This is a 7% e-commerce penetration.

Part of the high-end fashion and design is clothing. Here we see that the online sales grows with 22% to a total of €3,9 Billion.

(source*: The Future of Luxury: Bouncing Back from Covid-19: Bain & company 2021; www.statista.com; 2021)*

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Conclusion: High-end fashion and Design

If we look at the sub-segment of 'High-end fashion and Design' we can state that Italy is a country in the heart of this industry. Of the world business 6,5% is taking place here. Demographically you would expect only 0,8%. Of the total clothing production in Europe **40% is made in Italy.**

Italy has been able to create an extremely strong brand with 'made in Italy'. This brand helps to create a stunning 53% in export of the total sales of 'Personal Luxury Goods'

The **online sale has grown with 50%** in 2020, of which a significant part comes from abroad. This brings the online sales penetration in this subsector to 7% and the turnover to €1 billion Euros.

A very interesting development is that the shift to digital, the big role of social media and influencers are transforming this market. With this online development the market becomes less dependent of visiting tourists and offers a good channel for requiring orders and customer relationship management.

Opportunities:
Dutch entrepreneurs that work in the High-end fashion and Design industry and produce their product in Italy have a great chance to benefit from the strong brand 'Made in Italy'. By entering the Italian market it is very well possible that a huge international market will open up. The fact that there are more small Dutch companies can lead to operation in marketing, service and aftercare.

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FACTSHEET Subsectors: High-end design (Luxury Personal Products)

Italy in development

- With the Luxury Personal Products Market we intend the leather goods, fashion, watchmaking, jewelry, perfumes and cosmetics;
- Their total market size in Italy is €14 Billion, this is a +/-25% of the total Italian market for luxury products;
- Made in Italy products make up 60% of total tourism spending in Italy.

Conclusions

- The Luxury Personal Products Market has a significant role in the Italian GDP;
- Made in Italy is a very strong brand and could also stimulate the export (53%);
- The growth in the online sales of Luxury Personal Products is enormous (50%);
- The online sales is becoming a relevant part of the total sales (7%).

Local opportunities

- Make use of the ‘Made in Italy’ brand, including the international export;
- Shipping advantages; the product is already in Italy;
- Unite forces with other Dutch boutique brands that produce in Italy.

source: The Future of Luxury: Bouncing Back from Covid-19: Bain & company 2021; www.statista.com; 2021

Italy in numbers

Growth sector

- ✔ The personal luxury goods worldwide market is €220 Billion;
- ✔ The Italian market size is €14 Billion (6%).

Growth e-commerce

- ✔ In 2020, 50% growth in online sales of personal luxury goods;
- ✔ The current E-commerce market has a size of €0,96 Billion, this is 7% of the market;
- ✔ The online growth of clothing grows by 22% to a total of €3,9 Billion.

Details

- ✔ The export is 53% of the personal luxury goods market in Italy;
- ✔ Over 40% of the total clothing production in Europe is made in Italy.

Possible NL players

https://www.hanssop.com/
https://www.minois.co/nl/
https://tessvanzalinge.com

Marketplaces

https://www.italist.com/
https://barrocoitalia.com
https://www.viamadeinitaly.com/

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Cosmetics and Skin care

Italy is a country where 'cosmetic and skin care' is very important. They represent an industry that is very classic and reseller oriented. We are talking about a €10 billion industry in comparison with the €2,5 billion in the Netherlands.

Although the online sales is only representing 4,5% of the total sales we see some significant changes here in the trends. In 2019 the online sales of cosmetic sales has been growing with 22%.

In 2020 we see that 18 million Italians have bought Health and Pharma products online. Of which 5,6 million are regular online buyers. This group has grown with 20,7%.

In the age group under 30, we can see that consumer trends are increasingly driven by the web and especially by bloggers and influencers.

We see the importance of mobile in this sector with the fact that already 79% of the online sales orientation is mobile. One-third of the orientation is done by men, further we see that the age group of 25-44 years generate 50% of the online sales. Some of the most-followed cosmetics influencers in the world are Italian (e.g. Chiara Ferragni).

The main trends are: interaction with the digital world, greater connection between health and beauty, sustainability and ethical choices, personalized products and individual experiences and alternative distribution models

source: THE COSMETICS INDUSTRY IN ITALY; Switserland global Enterprise 2020, Continua a crescere l'interesse online per cosmetici e prodotti beauty durante la pandemia 2021

Conclusion: Cosmetics and Skin care

We can conclude that the market for 'Cosmetics and Skin care' products in Italy is significantly bigger then the Dutch one (4x). The **€10 billion** spend makes it a very relevant market.

If we look at the online channel, we see strong growth and development. This is driven by the young adults and the very strong online present of bloggers and influencers in the Italian market. We see this in the **growth of 22%** (2019). Very important for the online channel is to realize the dominance of mobile use.

We should not make the mistake to only look at the youth. The average life expectancy in Italy is **11 years higher** than the global average, with one of the highest percentages of over 65s in the world (almost 30%). This offers great possibilities for personalized products for this target group.

Opportunities:
Dedicated online Dutch brands now have a chance to enter the Italian market with distinctive USP's. Without the burden of the reseller channel and all the experience in 100% online they can make an impact. Even a 'mobile only' strategy could already be an option in this market.

Kingdom of the Netherlands

FACTSHEET Sub-sectors: Cosmetics and Skin care

Italy in development

- Eighteen million Italians have bought Health and Pharma products online in 2020 of which 5,6 million are regular online buyers. This group has grown by 20,7%;
- In the age group of under 30, we can see that consumer trends are increasingly driven by the web and especially by bloggers and influencers;
- The main digital trends in Italy will be: interaction with the digital world, greater connection between health and beauty, personalized products and alternative distribution models;
- Italians have an higher life expectancy.

Conclusions

- The market size is significantly bigger in Italy compared to the Netherlands (4x);
- The online market is growing fast and speeding up (22%);
- The market is moving more and more to mobile use (79%).

Local opportunities

- Dedicated online brands have a chance to enter the market with distinctive USP’s;
- Influencers and socials will shape the online market;
- Strategy of online only and working with influencers smaller players greats lots of possibilities.

Italy in numbers

Growth sector

✔ Total IT cosmetics sector is in total €10 billion in 2019, the NL is in total €2,5 billion.

Growth E-commerce

✔ 4,5% of the cosmetic sales is online, this realize a total growth of 22% in 2019.

Details

✔ 65% of the sales orientation is done by women;
✔ The age group of 25-44 years generates 50% of the online sales;
✔ Some of the most-followed fashion and cosmetics influencers in the world are Italian.

Large e-players

www.efarma.com
www.shop-farmacia.it

Possible NL players

www.paulaschoice.com

Marketplaces

https://www.theitalianreve.com/
www.skinshop.it

source: THE COSMETICS INDUSTRY IN ITALY; Switserland global Enterprise 2020, Continua a crescere l'interesse online per cosmetici e prodotti beauty durante la pandemia 2021

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In depth:
online development

February 2022

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Online developments

Numbers: Digital payments

The most used online payment method in Italy are **credit cards** with (41%), followed by digital wallets (25%) and bank transfers (15%). Credit cards and bank transfers are currently losing market shares. Also payment upon delivery (12%) and payment via mobile (2%) are declining in favor of instalments payment methods (+4%).

Online payments, and especially the use of online wallets, are growing fast in Italy. Of all the payments executed in Italy, **over a third are digital payments.**
An interesting trend is **Buy Now Pay Later (BNPL) solutions**. With this payment solution you can pay your purchases after receiving the product and in different instalments. This solution was just recently introduced in Italy and it has already gained 4% of all online payments.

In Italy there are a lot of different banks and the **banking bureaucracy** is significant. It will be difficult to create a similar payment solution between banks like iDeal was able to realize in the Netherlands.

Important players in Italy are: Credit card companies, PayPal and local PSP companies are **Nexi and Satispay.**

Important players in the Netherlands are: iDeal, PayPal, Credit card companies and local PSP players are Adyen, Pay.nl, Sisow and Mollie.

Source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report

Online developments

Kingdom of the Netherlands

Trends: Digital payments

This industry of digital payment solutions is fast moving due to **ease of use, customer demand and innovations.** The pandemic stimulated this development strongly which resulted in fast growing industry and a big market share in the payment methods industry in Italy.

Due to the high technological influence this world is very unstable for now. With new innovations and a continuous arrivals of new start-ups the preferred payment method of final customers can change in just a few months. An example is the strong increase of the **Buy Now Pay Later solutions.** They just made their market introduction two years back and now gained up to 4% of all the digital payments.

Source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report

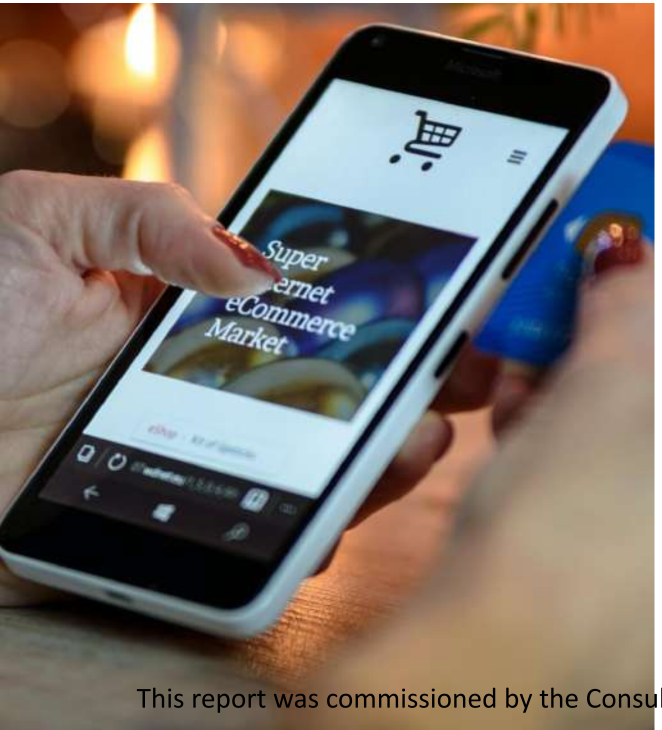
Forecasts: Digital payments

For now, the use of credit cards as preferred digital payment method will dominate but decline. We expect a lot can change in the near future. The reason for these strong shifting markets is dependent mainly on ease of use for the final customer, customer demand, new offers of start-up companies and technological innovations.

The use of digital payment solutions and digital wallets will increase even more in the future. We expect that the solution Buy Now Pay Later and other solutions as Satispay will continue to gain market shares. The growth and success of these companies will depend strongly on the technological innovations and ease of use for the final customer. Digital payment fintech companies can pop-up, become a market leader or disappear instantly.

Numbers: Mobile

In 2020 Italian online customers have spent in total € 15,7 billion using their smartphone. This is an increase of 22% compared to 2019. In **51% of all online purchases** the mobile phone was the preferred device to order.



In 2021 Android had a market share in Italy of **69%** and IOS from Apple had a market share of **30%.** Practically, companies that wants to enter Italy do not have to focus on other operating systems.

Of all executed online payments the most preferred method to purchase is by the use of mobile applications. These applications are optimized for mobile purchases, saved payment methods and **ease of use** of the final customer.

Source: https://gs.statcounter.com/os-market-share/mobile/italy October 2020
Source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results

Online developments

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Trends: Mobile

During the lockdown, the smartphone has become the most **preferred way** to purchase online in Italy. Desktop computers are the second preferred method of purchasing online. While using the smartphone for online purchases by Italian customers the use of online wallets and pre-saved payment methods are very popular due to their **ease of use** for the final customer.

Source: Politecnico Milano & Osservatori.net (October 2020). Ecommerce B2C: La chiave per ripartire. Presentation research results

Forecasts: Mobile

The usage of smartphones for online purchases has taken over the market as the preferred purchase method and will continue to grow in the following years. This development will be stimulated in a positive way by new and more customer friendly solutions, mobile applications and mobile payment solutions.

Online merchants, website developers and app designers are obligated to start with ‘mobile first’ thinking instead of ‘desktop first’ design. Mobile content and copywriters are restrict to more powerful applications and less detailed content.

Numbers: Sustainability

Of Italians 42% declare to be willing to pay extra for more sustainable shipments, however less than 1% of Italian online retailers could offer **ecological delivery solution.** Moreover, 63% of consumers declare to be more likely to buy from a company that shares information on the impact of its products on the planet. Of the users 76% **expect companies to drive climate change.**

Examples of companies active in Italy with **sustainable e-commerce:**

- Last green mile: PonyU and Glovo
- Recycled packaging: Packhelp.it, Selfpackaging.it
- Re-used products: Vinted
- Green products such as 0km food and groceries: Cortilia, Hellofresh

Examples of companies active in the Netherlands:

- Last green mile: bicycle couriers, and electric delivery bikes: PostNL.
- Recycled packaging: Voges NL, Unilever, De Jong verpakkingen
- Re-used products: Marktplaats.nl, Vinted.

(Source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report)
(Source: What is a CSO and does every company need one?, World Economic Forum, 2021)

Online developments

Kingdom of the Netherlands

Trends: Sustainability

The **demand** from the online customer for sustainable e-commerce products and services is high. **Larger sized e-commerce companies** are very active in this sector with statements to be more sustainable in a certain year and different initiatives per sector. The first Italian SME companies are starting to follow this trend.

Source: Casaleggio Associati (2020). E-commerce in Italy 2020 (B2C). Report

Forecasts: Sustainability

Sustainability will become the new standard online. Customers are not willing to pay extra but expect merchants to participate in this anyway.

The majority of the Italian SME e-commerce companies will soon follow this international trend. This can vary from statements to be more sustainable by a certain year, recyclable packaging, green delivery to recycled products within the assortment, ‘green-label’ product options, ‘plant a tree’ initiatives and more.

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Conclusion:
in depth

February 2022

Final conclusions

After this research one conclusion strongly stands out: **The moment is now**. If you, as **Dutch e-commerce entrepreneur,** want to be on time you need to step in right now. The **Italian online market** is growing up very fast and the online penetration has a steep growth curve. Traditional Italian player are starting to move online, local start-ups are growing fast and foreigner e-entrepreneurs and investors are stepping in.

It is important to realize that you will need **2-3 years** to be **up to speed**. By stepping in now you are in time to benefit from the **natural growth** of the online market.

If you start **later**, it can well be that you find this growth wave coming back at you. Meaning that it will be to **hard and costly** to enter because the market is already mature and dominated by a few players.

Three sub-sector and three development have been **highlighted** to show their **big potential**. The results can give online entrepreneurs the **inspiration and confidence** to step in **now.**

More subsector and development will **follow** in the future to pave the way for Dutch e-commerce entrepreneurs in the Italian market.

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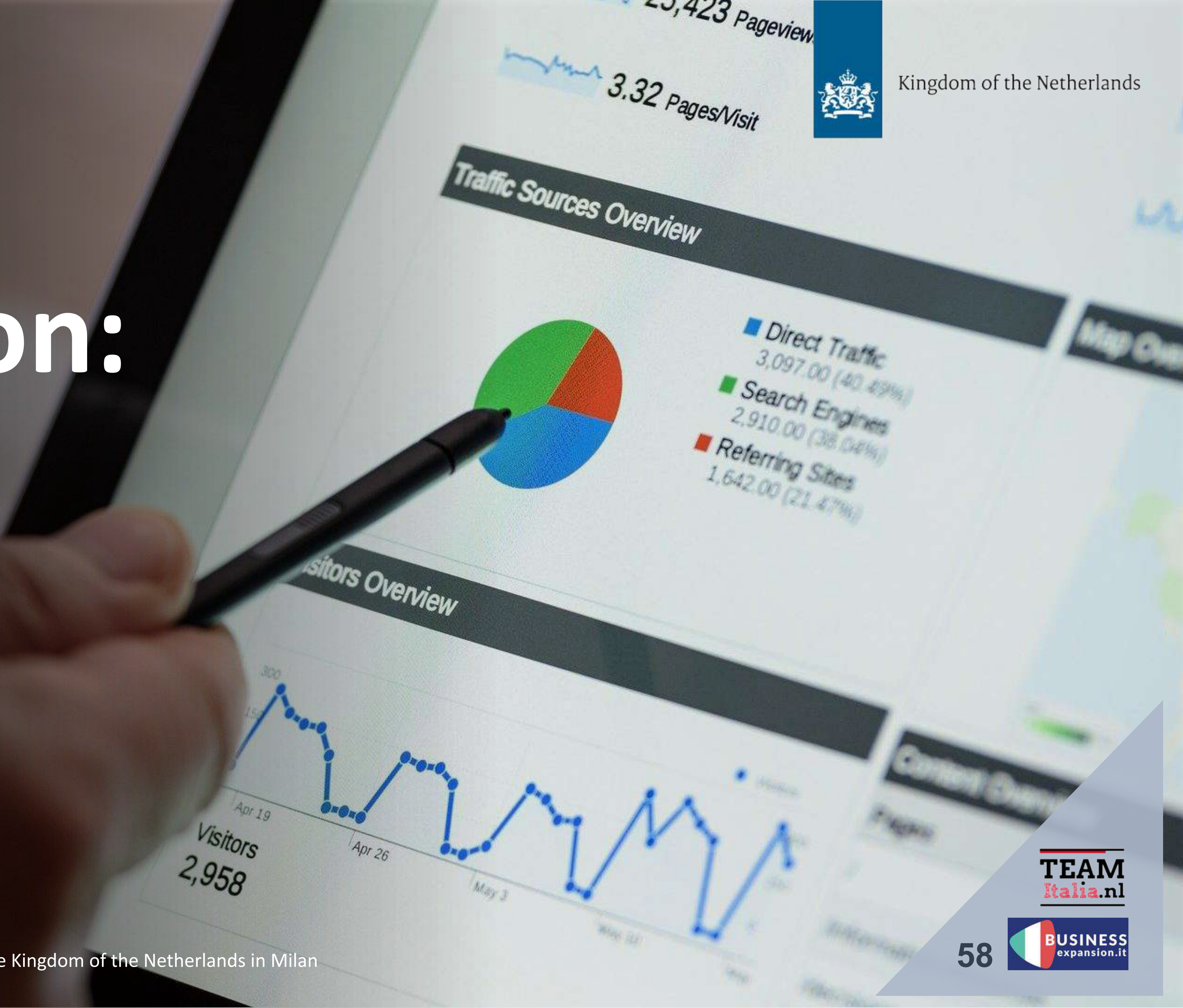
Practical information:
how to move

February 2022



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How to move?

In Italian is the only way

All channels and communication has to be in Italian.

Start with a market research and entry plan

Go into depth and research your pricing, payment methods, logistics, website- and product registration.

Dare to price

You can be competitive with medium pricing. Include the shipping costs into the price.

Start simple

Start with the fulfilment from 'home' and with a reduced bestsellers offer.

Realize you start again from zero

Italian customers don't know your products or brand.

Take your time

It takes two to three years to be at full speed.

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Next subjects to investigate

Sectors:

- E-bikes
- Kids applications
- Kids toys
- Wellness industry

Developments:

- Artificial Intelligence (AI)
- Contactless payment
- Customer experience
- Marketplaces
- Last mile delivery

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Contact details

Consulate-general of the Kingdom of the Netherlands in Milan - Italy:

Edith de Vries
Manuela Capra
mil-ea@minbuza.nl

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Contact us
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