



# E-barometern

PostNord in association with HUI Research

Q1

2025

**postnord**



# About E-barometern

**PostNord monitors** the Swedish retail sector's e-commerce development in association with HUI Research. E-barometern is published once a quarter and is based on four consumer surveys and a survey of companies. E-commerce is defined in E-barometern as being the online sale of items, with subsequent delivery to the home or a distribution point, or collection by the consumer from a store, warehouse or distribution center. The following are therefore not considered to be e-commerce in E-barometern:

- In-store purchases that were initially arranged via the internet
- The online sale of services (for example, travel, hotel accommodation and concert tickets)
- Downloading of, for example, music files, movies and applications
- Business-to-business online sales
- Consumer-to-consumer online sales

**E-barometern Q1 2025** is based on information gathered from retail companies in April and May 2025. A total of 97 companies took part in the survey. Four consumer surveys have been carried out using Kantar's web panel. All the surveys are conducted with a representative sample of Sweden's population between the ages of 18–79.

The first survey was conducted in February 2025, the second in March 2025 and the third in April 2025, with around 1,500 respondents per survey. The fourth survey was conducted in March 2025 with 3,019 respondents. The online surveys are representative of the 98 percent of Sweden's population that has internet access. Contact PostNord for detailed information about each survey.

## Foreword

**The year began with** optimism that 2025 would be the year of recovery. Eight in ten consumers and even more e-retailers said that their expectations regarding the economy and sales this year were better than or the same as last year. Since then, developments have become more uncertain. The theme of the last few months has been international turbulence as we wait to see how tariffs and their consequences play out in terms of trade and the economy. Despite this, the quarter ended with growth of nine percent.

**International and circular** e-commerce are more relevant than ever and serve as the main theme of this year's first E-barometern report. Half of the Swedish population has made online purchases from abroad in the past year. Last year, for the first time, China became the most popular

country from which to make online purchases, followed by Germany. E-commerce from the UK has declined sharply post-Brexit; developments regarding trade barriers can give an idea of how trade with the US may be impacted going forward.

**Where circular e-commerce is concerned,** we are seeing continued low awareness among consumers of the second-hand range that traditional e-retailers offer. Just like last year, only three percent of consumers purchased second-hand items online from a traditional e-retailer. Plick's CEO Jimmy Heibert anticipates greater potential for second hand if producing new items becomes more expensive in the event of a trade war and provides his perspective on what Swedish e-retailers have to gain from investing in second hand.

**A new feature of the** report is that we are now adding business intelligence on Beauty & Health to our sector pages due to it being an expansive and inspiring sector.

Enjoy the read!



**Ylva Staszewski**  
Acting Head of the Parcels  
business area,  
PostNord Sweden

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## Recovery in the shadow of global turmoil

In 2024 the Swedish economy began to bounce back from the recession, but this process has turned out to be slower than previously predicted. Subdued inflation and improved household purchasing power are boosting the economy, although these developments are taking place at a time when the global landscape remains volatile, which is having an impact.<sup>1)</sup>

The first quarter of the year saw tariffs, geopolitical instability and uncertain trading conditions affecting economic recovery. The trade tariffs introduced or raised in early 2025 have affected import and export flows, as well as prices.<sup>2)</sup> Where Swedish companies are concerned, this can entail higher costs – especially for exporters, as the United States is Sweden's third largest export market.<sup>3)</sup> The situation is also affecting companies without any direct trade with the United States, as global value chains mean that the impacts are felt widely throughout the business community. Where Swedish consumers are

concerned, items such as clothing, beauty products, wine, ice cream and plastics may increase in price.<sup>4)</sup>

However, households are more optimistic now than they were last year, with falling mortgage rates and real salary increases being a contributing factor. The Retail Outlook report forecasts a cautious upturn in sales volumes for the retail sector as a whole during the year.<sup>5)</sup> However, several uncertainties mean that the recovery will be slow. For example, households have financed part of their consumption in recent years with savings, meaning that they may have a major need to build up a buffer.

The situation in the world is changing, and global challenges such as tariffs and geopolitical turmoil have had a major impact. Nevertheless, the Swedish economy continued to move in the right direction in the first quarter of the year, with e-commerce also expected to continue on a positive trajectory during the year.

<sup>1)</sup> Retail Outlook report, March 2025 <sup>2)</sup> The Riksbank, January 2025 <sup>3)</sup> National Board of Trade Sweden, December 2024

<sup>4)</sup> SVT Nyheter, April 2025 <sup>5)</sup> Retail Outlook report, March 2025

<b>Total</b>	<b>9%</b>
Pharmacy	24%
Furniture & home furnishings	10%
Sports & leisure	10%
Clothing & footwear	9%
Building products	8%
Home electronics	6%
Groceries	2%
Books & media	-1%

## Strong start to the year for e-commerce

E-commerce continues to trend in the right direction; growth in the first quarter of the year was nine percent. Moreover, e-commerce has grown faster than in-store commerce<sup>1)</sup>, allowing the sales channel to gain market share in the retail sector as a whole. Growth has been at its highest since 2021, when e-commerce reached a historical peak. However, it is important to remember that several years of decline have meant that sales volumes in many sectors are now below the levels of the 2021 pandemic year.

The trend that gathered pace in 2024, with an increasing number of sectors showing growth, will continue in 2025. All sectors apart from books and media experienced growth during the quarter. Even capital-intensive sectors that have had an extended period of low sales, such as the home electronics and building products sectors, are now showing growth.

However, the world is in a state of flux, and while the overall trend is positive, the road ahead may be bumpy. Some sectors are more sensitive than others. For example, the clothing and footwear sector has proved to be relatively stable, while the home electronics sector is more sensitive to disruptions in supply chains and the situation in the economy.

In addition to the sales captured in the E-barometer growth figures, sales are also made through other channels. Competition from the international low-price giants is still growing, as are consumer-to-consumer sales. According to the Parcel Index for the first quarter of 2025, the biggest C2C players' parcel volumes have increased by 56 percent, with the corresponding figure for foreign e-commerce being 16 percent.<sup>2)</sup> This growth is challenging traditional e-commerce and will continue to shape how the market develops in the future.

<sup>1)</sup> Statistics Sweden, Turnover in Retail Trade <sup>2)</sup> Parcel Index, Q1 2025



# Continued success in the pharmacy sector

The online pharmacy sector is continuing to grow in size and importance. Its growth remains higher than that in all other sectors, with growth for the quarter of 24 percent. Growth for Q1 2025 is to some extent affected by factors affecting comparability, as Apoteket AB's e-commerce sales were negatively affected in Q1 2024 when operations were relocated to their new e-commerce warehouse.<sup>1)</sup>

The growth of the sector online can be explained by factors including lower prices than in traditional physical pharmacies and by sectoral shift towards beauty and cosmetics products. The sector also has very little competition from abroad, which is beneficial in terms of sales. However, going forward, it is likely that the competitive advantages will need to expand beyond the lowest possible price. According to Aposmart, which monitors price trends in the sector, market participants are beginning to focus more on visibility and effective campaign offers, as well as on continuing to broaden their product range.<sup>2)</sup>

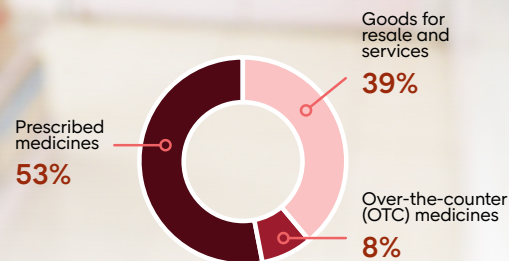
Most online pharmacy sales concern prescription medicines. However, significantly

more prescription medicines are sold in in-store commerce than in e-commerce; the e-commerce share of prescription medicines is only 16 percent.<sup>3)</sup> According to Jörgen Bitzekis, e-commerce director at Kronans Apotek, there is major potential to further increase sales of prescription medicines online, even though the products have relatively low margins. However, to make this possible, there is a need to keep raising awareness of the option of purchasing prescription medicines online.<sup>4)</sup>

There is still a great deal happening in the online pharmacy sector, and both growth and profitability vary among the different market participants. Swedish business daily Dagens Industri reported in February that market shares in the pharmacy sector are undergoing change. Growth among the pharmacy giants varied between 11 and 40 percent in 2024, with Apoteket experiencing the lowest growth and Apohem the highest. This affected Apotea's share price, as Apotea experienced a lower pace of growth than the rest of the sector.<sup>5)</sup> At the same time, Meds is planning to take big steps forward. The company's CEO has stated that, given the right conditions, an IPO may be considered in the future.<sup>5)</sup>

24%

e-commerce growth  
Q1 2025



Sales in the outpatient market,  
e-commerce Q1 2025

Source: Swedish Pharmacy Association/SA Service AB  
Share of total sales, SEK.

SEK 459

SEK +34 since last year

Average amount  
spent online over  
last 30 days

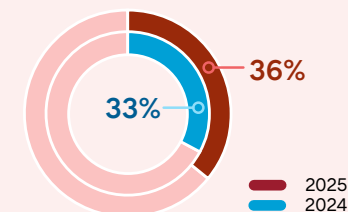
Basis: Consumer, has  
shopped online, average  
Jan – March

SEK 705

SEK -66 since last year

Average amount of  
most recent purchase  
from abroad

Basis: Consumer, has  
made online purchases  
from abroad



Percentage of  
e-commerce consumers who made  
a purchase in the category

Basis: Consumers who have shopped online



Percentage of e-commerce consumers who  
purchased the category from abroad

Basis: Consumers who have shopped online



Percentage who always or fairly often try to make  
conscious sustainability choices when shopping online

Basis: Consumers who have shopped online

<sup>1)</sup> Market.se, April 2024 <sup>2)</sup> E-handel.se, April 2025 <sup>3)</sup> Swedish Pharmacy Association, Sector report 2025 <sup>4)</sup> Detaljhandelspodden retail sector podcast, April 2025 <sup>5)</sup> Market.se, February 2025 <sup>6)</sup> Svensk Farmaci, February 2025

# Higher deduction could boost the sector

The online building products sector has long faced challenges, but better times are ahead. Growth for the quarter was 8 percent. After three consecutive years of decline, this is the first quarter to show growth. However, the protracted period of decline has led to sales volumes in the sector being significantly lower today than in 2022.

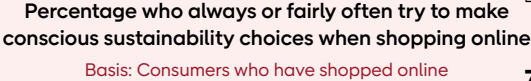
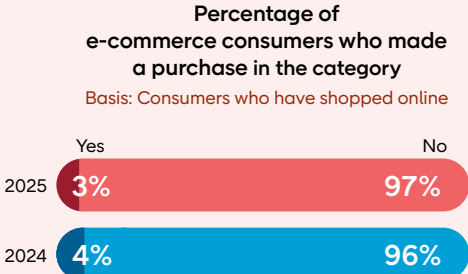
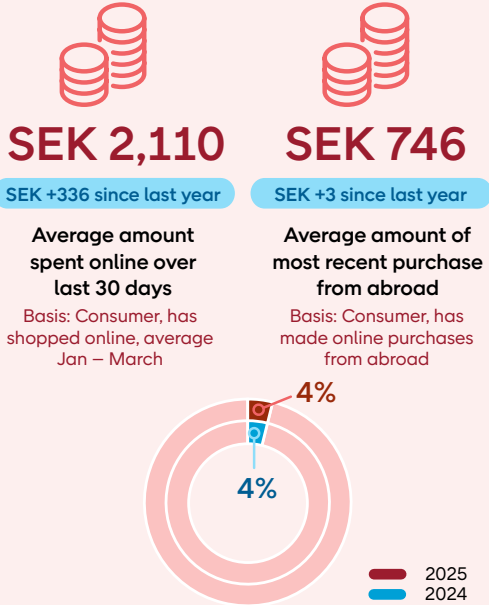
According to the Building Materials Index of the Association of Swedish Building Materials Merchants, the sector has witnessed growth in both current and fixed prices, meaning that volumes have grown during the quarter. Moreover, consumer sales have been particularly strong, suggesting that Swedish households have renewed interest in renovating their homes.<sup>1)</sup> However, despite these positive signs, the uncertainty in the economy as a whole is still impacting the sector. According to the Retail Outlook report, recovery, albeit weak, is expected in both 2025 and 2026.<sup>2)</sup>

To bolster the building products sector, the Swedish Government has decided to

temporarily increase the ROT (Repairs, Conversion, Extension) deduction from 30 to 50 percent as of May 2025. This increase forms part of the spring budget and aims to stimulate the economy. The higher deductions will remain in force for the rest of 2025.<sup>3)</sup>

The sector organization Association of Swedish Building Materials Merchants also wants to see a green ROT deduction enter into force. The proposal aims to provide greater incentives for sustainable construction by offering the chance to obtain a ROT deduction for energy efficiency measures, green technology, renovation using recovered materials and by rewarding the use of sustainable products.<sup>4)</sup>

It remains to be seen whether the increased subsidies will influence sales in the building products sector. It is likely that a combination of improved household finances and lower construction project costs will give the sector a boost this year.



<sup>1)</sup> Association of Swedish Building Materials Merchants, Q1 2025 <sup>2)</sup> Retail Outlook report, March 2025 <sup>3)</sup> SVT, April 2025 <sup>4)</sup> Association of Swedish Building Materials Merchants, January 2025

# Poor growth despite popularity of annual book sale period

Growth in books and media sold online was minus one percent in the first quarter of 2025. Two recurring challenges for the sector are interest in its core product, i.e., books, and the battle for consumer time.

In the run-up to the annual book sale period, which starts each year towards the end of February, Adlibris noted high demand for physical books even before the sale period began. The number of pre-bookings increased by double digits compared to 2024.<sup>1)</sup> According to the product and price comparison website Prisjakt, there was particularly great interest in books and tablets in February. The number of clicks on the website and in the app increased by 96 percent and 37 percent respectively compared to the previous year.<sup>2)</sup>

However, it is important to remember that sale periods do not automatically lead to profitability or increased sales. Selling items at a lower price may lead consumers to postpone their purchases until the

sale period, affecting sales in the months before and after.

The role of physical books in an increasingly digitalized book sector has been investigated in a new report from the Swedish Publishers' Association. It finds that audiobooks are only replacing physical books to a minor extent. Around 1 in 10 consumers surveyed said that the main reason they do not read printed books or e-books is that they listen to audiobooks instead. The report also points out that other media are increasingly occupying consumers' time.<sup>3)</sup> Examples include podcasts, streaming services and social media.

Although books have received the most attention in the first quarter, the rest of the bookstore range continues to be important. Regardless of product category, the sector is increasingly competing for the consumer's time. Streaming and social media are the main challengers for the sector as a whole.



# -1%

e-commerce growth  
Q1 2025



## SEK 518

SEK -77 since last year

Average amount  
spent online over  
last 30 days

Basis: Consumer, has  
shopped online, average  
Jan – March

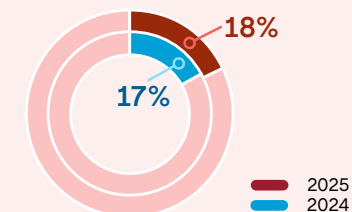


## SEK 729

SEK +92 since last year

Average amount of  
most recent purchase  
from abroad

Basis: Consumer, has  
made online purchases  
from abroad



Percentage of  
e-commerce consumers who made  
a purchase in the category

Basis: Consumers who have shopped online



Percentage of e-commerce consumers who  
purchased the category from abroad

Basis: Consumers who have shopped online



Percentage who always or fairly often try to make  
conscious sustainability choices when shopping online

Basis: Consumers who have shopped online



# Grocery sector cooking up online solutions

The online grocery sector continues to expand, with growth for the quarter of two percent. However, the rate of inflation means that price increases rather than volume growth are mainly driving this development. Easter, which along with Midsummer is the second most important sales event of the year, fell in April this year and in March last year.<sup>1)</sup> The fact that growth is still positive can therefore be considered a strong result for the sector.

Selling groceries online is a challenging endeavor. Several market participants in the sector have struggled to make ends meet, largely due to the small margins and costly and complex transportation. However, they are continuing to develop their business models and invest in new e-commerce solutions.

One example is Coop, which is working to increase sustainability in its deliveries.

In collaboration with Gordon Circular, Coop offers reusable packaging for its e-commerce deliveries. In addition to the environmental benefits, the system has also led to more satisfied and loyal consumers, and to losing fewer customers.<sup>2)</sup> Mathem is working to streamline its picking process. Following the merger with Norwegian Oda, a new logistics system has been introduced, enabling more items to be picked per hour.<sup>3)</sup>

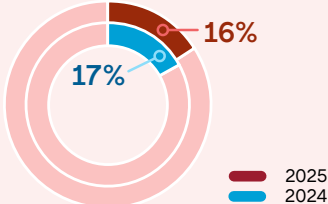
Experts from trade association Svensk Handel highlight joint delivery solutions, AI and route optimization as key components of making the online grocery sector profitable. They also see opportunities in the B2B offering, for example through public procurement for schools and elderly care, or via new revenue streams from LaaS\*.<sup>3)</sup> However, which solution(s) will ultimately be the key to a profitable online grocery sector remains to be seen.



Average amount  
spent online over  
last 30 days  
Basis: Consumer, has  
shopped online, average  
Jan – March



Average amount of  
most recent purchase  
from abroad  
Basis: Consumer, has  
made online purchases  
from abroad



Percentage of  
e-commerce consumers who made  
a purchase in the category  
Basis: Consumers who have shopped online



Percentage of e-commerce consumers who  
purchased the category from abroad  
Basis: Consumers who have shopped online



Percentage who always or fairly often try to make  
conscious sustainability choices when shopping online  
Basis: Consumers who have shopped online

<sup>1)</sup> Svensk Dagligvaruhandel Annual Report 2024 <sup>2)</sup> E-handel.se, April 2025 <sup>3)</sup> Market, February 2025  
\*Logistics as a Service

# Charged atmosphere in the electronics sector

Growth in the home electronics sector was slightly negative in 2024, hovering around zero between quarters. By contrast 2025 kicked off with growth in the sector of six percent for the first quarter, the strongest performance in the last three and a half years. However, with several weak quarters in the rear-view mirror, sales volumes in the sector are not the same as they were a few years ago.

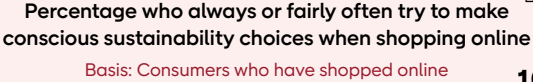
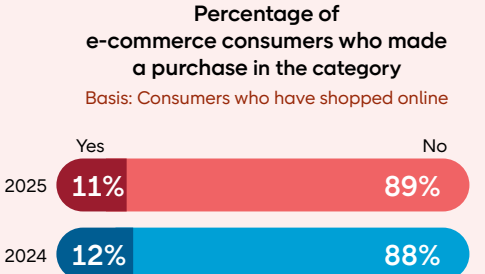
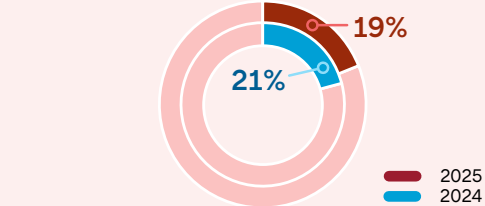
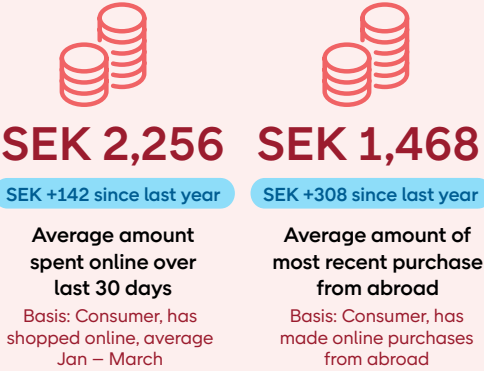
The uncertain situation in global trade could have a major impact on future developments, as the sector is largely dependent on imports and exports of various items.

China is the world's biggest exporter of electronics<sup>1)</sup> and with a fall in demand from the US, it may redirect more of its exports to Europe in search of new markets that can absorb the surplus. This could lead to a greater supply of Chinese electronics in the European market, which in turn could force down

prices and stiffen competition for European companies.<sup>2)</sup>

Supply chains are another sensitive area that risks being impacted by global market disruptions. In the home electronics sector, several product categories rely on components manufactured in Asia, especially microchips, which are a key component in almost all electrical products. More than 90 percent of the world's microchips are produced in Taiwan<sup>3)</sup>, meaning that conflicts in the region risk having a widespread impact on global electronics manufacturing.

The impact of the global trade war on the home electronics sector is still uncertain, not least due to the frequent changes in tariff guidelines. However, some market participants have already started taking action to reduce their risks. For example, Apple plans to move a larger part of its production from China to India.<sup>4)</sup>



<sup>1)</sup> Titoma, December 2024 <sup>2)</sup> Market, April 2025 <sup>3)</sup> Placera, March 2025 <sup>4)</sup> SVT, April 2025

# Low price raises questions in the clothing sector

Clothing and footwear continues to be a growth sector in e-commerce. In the first quarter of 2025, growth was 9 percent, which means that the sector is continuing to grow online. One reason for this sustained growth is that clothing is generally driven by trends and constitutes a non-capital-intensive everyday purchase. For this reason, changes in economic conditions do not affect the sector to the same extent as they do the furniture sector, for example.

There is a multitude of circular business models in the online clothing and footwear sector. Nevertheless, it is still the case that only a small proportion of traditional e-retailers sell second-hand items. However, many market participants are trialing new circular solutions. Recently, both Lindex and Bubbleroom, in collaboration with Revive Retail, launched their own C2C platforms on which consumers can buy and sell clothing via the retailers' own channels.<sup>1)</sup> KappAhl, in collaboration with Recrql, also recently launched a C2C solution

for second-hand items, "Kappahl Recrql".<sup>2)</sup>

During the quarter, the presence of Chinese market participants from the low-price segment in the second-hand market has raised questions. Second-hand stores report receiving large quantities of garments from Shein and Temu.<sup>3)</sup> The circular platforms have handled this in numerous ways. At Vinted, for example, Shein has recently become its own brand category.<sup>4)</sup> By contrast Erikshjälpen, a non-profit with second-hand stores all over Sweden, has stopped accepting clothing from Shein due to suspicions of harmful levels of chemicals in their items.<sup>5)</sup>

While it remains to be seen how the clothing of these market participants will be dealt with in the circular market-places, the interest in foreign discount retail and the second-hand market is impacting the development of the entire clothing sector.



## 9%

e-commerce growth  
Q1 2025



### SEK 1,232

SEK +50 since last year

Average amount  
spent online over  
last 30 days

Basis: Consumer, has  
shopped online, average  
Jan – March

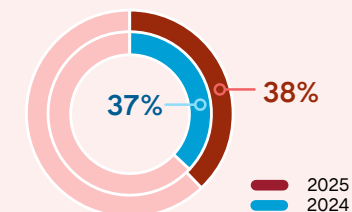


### SEK 962

SEK -6 since last year

Average amount of  
most recent purchase  
from abroad

Basis: Consumer, has  
made online purchases  
from abroad



Percentage of  
e-commerce consumers who made  
a purchase in the category

Basis: Consumers who have shopped online



Percentage of e-commerce consumers who  
purchased the category from abroad

Basis: Consumers who have shopped online



Percentage who always or fairly often try to make  
conscious sustainability choices when shopping online

Basis: Consumers who have shopped online

<sup>1)</sup> Revive <sup>2)</sup> Ehandel, February 2025 <sup>3)</sup> Sveriges Radio, January 2025 <sup>4)</sup> Vinted <sup>5)</sup> Sveriges Radio, February 2025



# Old furniture in a new guise

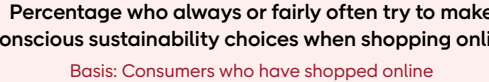
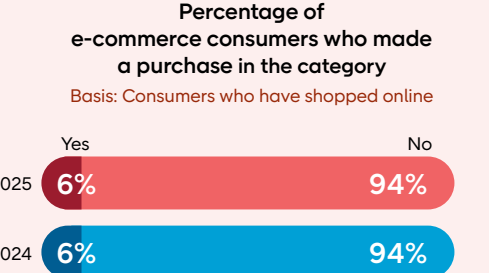
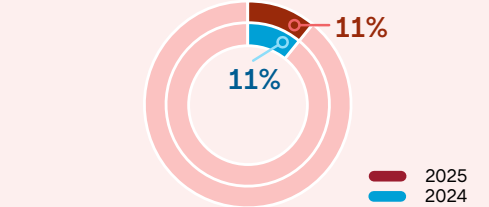
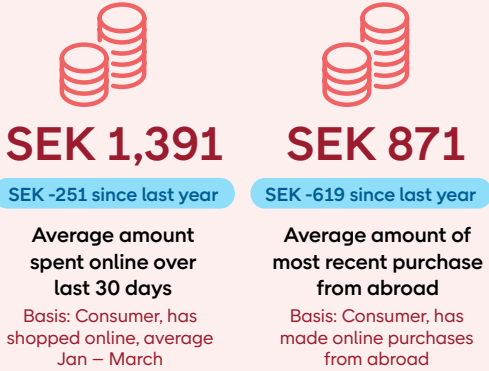
The online furniture and home furnishing sector started the year on a positive note. Growth in the first quarter was ten percent. Home furnishings have previously been the driving category in the sector, but as consumer purchasing power has increased, there is now further scope for more capital-intensive purchases in the furniture category. For example, BHG Group states that growth in all categories has driven the growth in the quarter.<sup>1)</sup>

Consumers are also showing greater interest in recovering old furniture. Upcycling is a viral trend on social media, with people combining reuse with an interest in second-hand items, creativity and a desire to add a personal touch to their homes. Hashtags such as #furnitureflip and #upcycled have amassed hundreds of millions of views on TikTok.<sup>2) 3)</sup> In the video clips, old furniture is given a new lease of life through small means. The furniture category lends itself particularly well to upcycling,

as many pieces are built using robust materials such as wood and metal, making them relatively easy to adapt and refine.

IKEA, for example, has long offered the opportunity to upcycle furniture, but this is now taking new forms.<sup>4)</sup> Søstre Grene is another company that provides tips on how to personalize their range through guides on their website.<sup>5)</sup> There are also specialized e-retailers whose business focuses on offering furniture components. Brands such as Beslagboden and Picky Living have partly concentrated their offerings on enabling upcycling by selling everything from cupboard and wardrobe doors to fittings and upholstery.<sup>6) 7)</sup>

If the interest in unique items persists, niche market participants may become more common in the future. This is particularly likely in this sector, where a few major participants dominate the market.



<sup>1)</sup> BHG Q1 report 2025 <sup>2)</sup> TikTok hashtags <sup>3)</sup> Tik Tik hashtags <sup>4)</sup> IKEA <sup>5)</sup> Søstre Grene <sup>6)</sup> Beslagsboden <sup>7)</sup> Picky Living

# Beauty sector moving from online to in-store

Few sectors stand out as much as the beauty sector. As of Q1 2025, E-barometern will monitor the sector to capture the trends, tendencies and business models that make it interesting – and unique.

Many new beauty companies launch their business journey by selling direct to consumer, D2C. This phenomenon is particularly common among influencers who launch beauty brands. There is a wealth of examples: Ida Warg started IDA WARG Beauty, Wilma Holmqvist has Hickapcosmetics and Daria Garipova has recently launched DAAR Cosmetics. The business model is particularly well suited to the beauty sector, partly because of the high level of interest in beauty, and partly because prior to launching, major influencers already have an established and loyal customer base in the form of their followers.

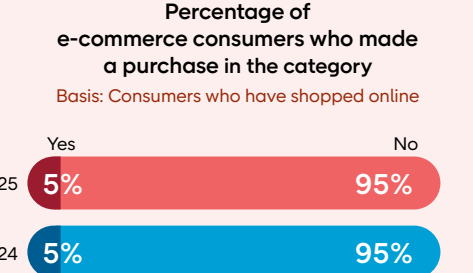
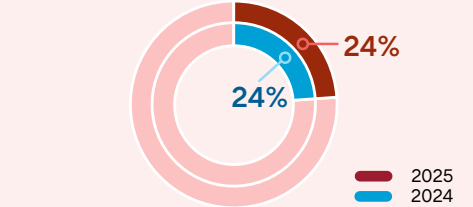
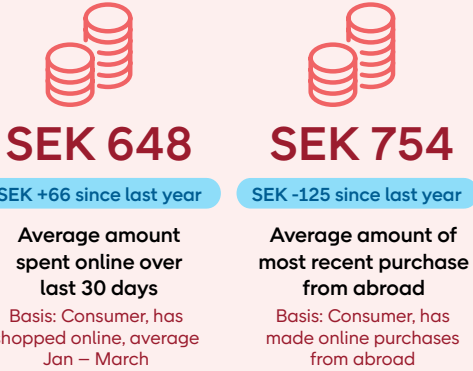
This process typically starts by the manufacturer setting up a website

and producing small product batches. They are often promoted through the founder’s own channels. This means that overheads can be kept relatively low.<sup>1)</sup> The advantage of starting small is that everything from risk to start-up costs can be kept in check. The downside is that the cost of production rises as sales volume increases because there are not yet any economies of scale.

There are many examples of how brands launched as D2C concepts online subsequently open physical stores. The well-known brand Caia Cosmetics has had a pop-up store at department store NK in Stockholm for some time and has now opened its first stand-alone store on Biblioteksgatan.<sup>2)</sup> Hickap has had a pop-up store in the Åhléns City department store, and Under Your Skin also had a temporary store in 2024.<sup>3) 4)</sup> The movement from online to physical store thus seems to be a recipe for success in the sector. It is likely that more brands will open such stores, at least temporarily.



\*The Beauty sector does not have sufficient coverage to be able to define growth.



<sup>1)</sup> Ekonomibyrån, February 2024 <sup>2)</sup> Fastighetsvärlden, October 2024 <sup>3)</sup> Dagens Industri, December 2023 <sup>4)</sup> Hickap on TikTok

## Big moments – greater demand?

After several challenging years, the tide has turned for the sports sector, with growth in the first quarter of 10 percent. According to the sports products trade association Svenskt Sportforum, the positive trend is based on higher consumption in all product categories, indicating strength in the sector's recovery and greater demand.<sup>1)</sup>

Sales in the sports sector fluctuate a great deal based on the season and weather. Warm temperatures in the first quarter of the year led to lower-than-expected sales of cross-country skis. At the same time, the weather meant an early start to the running season, with footwear sales consequently taking off.<sup>1)</sup>

Beyond the seasons, trends also play a key role in sports sector sales, with major sporting events being important trend-setters. During championships such as

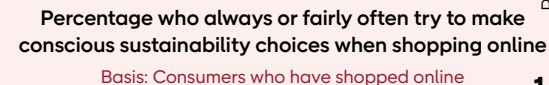
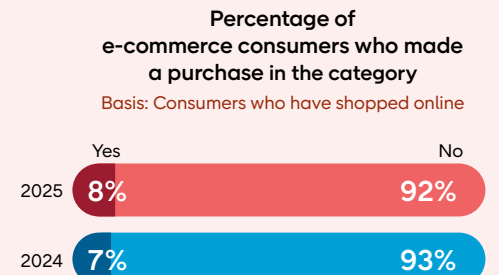
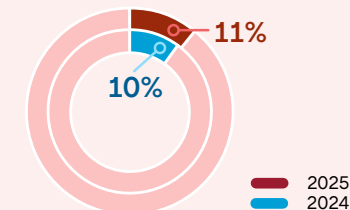
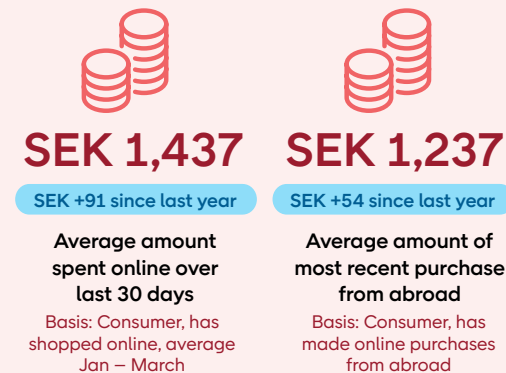
the World Cup, there is a clear increase in sales of footballs and soccer shirts in the sector.<sup>2) 3)</sup>

Sports and sporting events that offer Swedish success are responsible for particularly major trends. Some recent examples include greater interest in athletics following Mondo Duplantis' pole vault success<sup>4) 5)</sup> and a surge in interest in golf following Ludvig Åberg's achievements.<sup>6)</sup> Also, interest in judo grew after Tara Babulfath won the bronze medal at the Olympics last summer.<sup>7)</sup>

However, the impact on sales in different sports varies considerably. The effect is likely to be smaller in sports with a higher threshold, such as pole vaulting, while it is likely to be greater in more accessible and inexpensive sports, such as table tennis.

**10%**  
e-commerce growth  
Q1 2025

<sup>1)</sup> Svenskt Sportforum, Q1 2025 <sup>2)</sup> Market, July 2023 <sup>3)</sup> Itella, March 2023 <sup>4)</sup> Sveriges Radio, July 2021 <sup>5)</sup> SLA, September 2024 <sup>6)</sup> Sveriges Radio, April 2024 <sup>7)</sup> Sveriges Radio, September 2024







The image is an AI illustration.

# Increased differentiation – how retailers can grow in a turbulent market

The UK has long been ahead of the rest of Europe in terms of digital advertising and marketing. For this reason, it is often interesting to look at them more closely. The following is a deep dive into a study from Think with Google, from Google Sweden's industry manager Håkan Löfgren.



**Håkan  
Löfgren**

Retailers in the UK have been striving to offset economic uncertainty, rising costs, and online competition. A recent white paper by Google and Kantar, "The Differentiation Dividend"<sup>(1)</sup>, examined how they succeeded in doing this and concluded that brand differentiation is the most important driver of long-term sales success, accounting for 57 percent of companies' future growth. "Brand differentiation" is defined in the white paper as a brand's ability to set trends. Brands with a

high degree of differentiation were also found to have significantly higher pricing power – that is, the ability to command higher prices than their competitors. Over time, people have become increasingly price-conscious and less

brand-loyal. Nearly three quarters, 69 percent, of UK consumers now prioritize price over brand names. This has led to many retailers slashing their prices. But competing on price has hit the bottom line hard, and the differentiation of almost four in ten UK retailers is now also perceived as diminished. In fact, the total brand value of the UK's top ten retailers fell by 20 percent in one year alone, partly due to discounting. Homogeneity hurts brands.

The white paper highlights three areas to prioritize to reverse this trend and enable a higher degree of brand differentiation.

## 1. Align price with value perception

Differentiation starts with understanding your true value. One-third of all retailers surveyed had set prices that did not align with consumer perceptions of their offering. Pricing needs to be analyzed relative to competitors and customer perceptions of the brand. The aim is to establish a clear value proposition that justifies your price point. Consumer value is also about experiences, convenience, perceived purpose of the product and alignment to personal values – not just promotions and price. Communicate your value proposition across all relevant touch points, both offline and online.

## 2. Be visible at the right time for the consumer

The most important driver of short-term sales is not price, but salience. Being prominent, noticeable and relevant to consumer needs accounts for 48 percent of short-term sales growth. Being discoverable and



The five components of differentiation

**Be distinct:** Form an identity with a differentiated look and feel, whether in ads, products, or services.

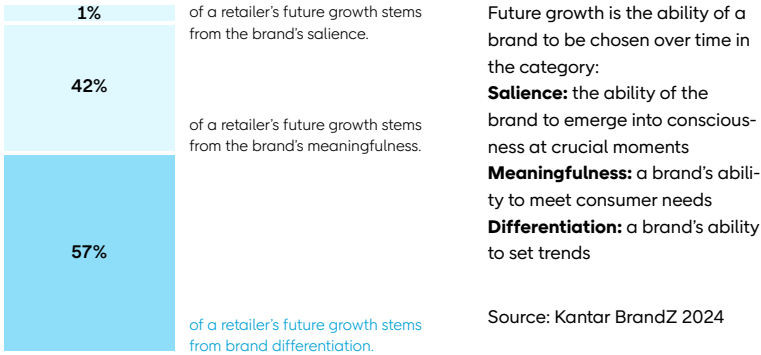
**Be unique and at the forefront:** Offer something truly different, perhaps a specialized niche or exclusivity, and use technology and data to enhance the customer experience.

**Be disruptive:** Challenge the status quo by offering new methods and products/ services.

**Be purposeful:** Stand for something more than just the products you sell.

**Be persistent:** When you think you have exhausted all avenues, many consumers will still never have seen your advertising or tried your product.

Most important single driver for short-term sales: Retail brand differentiation



accessible on digital platforms is crucial, with 71 percent of customers surveyed conducting extensive research online before purchasing. AI-optimized advertising combined with proprietary first-party data can help systematize this and give the retailer a competitive advantage over other retailers.

**3. Stand out from the crowd**  
There is a clear link between brand strength and pricing power. Strong brands can often command prices up to twice those of weaker ones. Just when retailers increasingly need to show up and stand out, they risk

being pulled into a murky middle ground of sameness and dragged down into the mire of discounts. Rapid advancements in technology, curiosity and high levels of ambition can help retailers to constantly evolve and remain at the forefront of their sector or category. When this is combined with human ingenuity, sales can be increased in the short term while building distinctive brands with real staying power and sales growth over time.

<sup>1)</sup> Differentiation drives retail success – Think with Google



The image is an AI illustration.

# A period of turbulence for international e-commerce

Foreign e-commerce continues to attract a great deal of interest from policy makers, e-retailers and consumers alike. The discussion touches upon everything from trade barriers to level playing field requirements. At the same time, consumer engagement is clear; almost half of consumers have made online purchases from abroad in the past year.

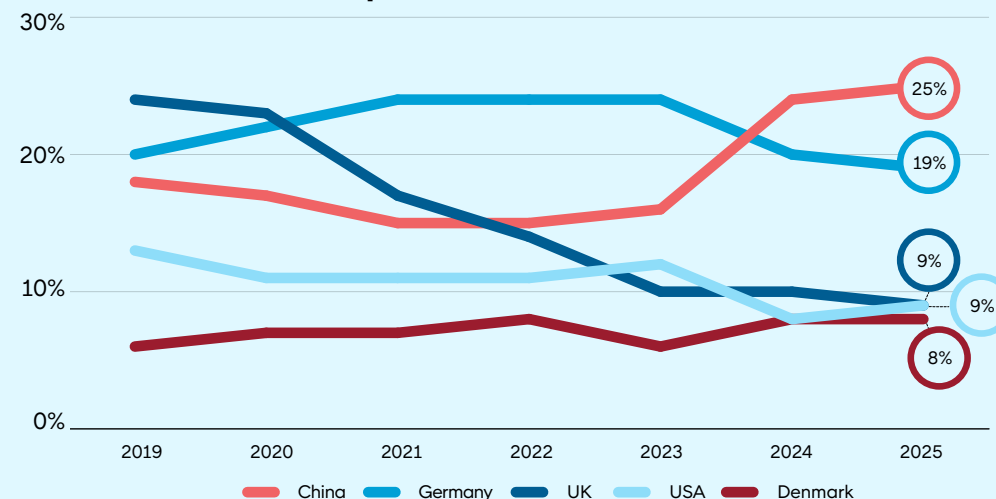
Last year saw major changes in the way Swedes make online purchases from abroad, with China for the first time becoming the most common country from which to make such purchases. The situation is more stable this year, with only minor changes. For example, e-commerce from China is up by only one percentage point. Germany is following a similar trend to last year, falling one percentage point, meaning that a record low proportion of Swedish consumers made their most recent online purchase from that country.

However, according to consumers, making online purchases from abroad has made a bigger impact on the money






in their pockets. In particular, costs beyond the price of the items, such as shipping and customs duties, have increased. One explanation for this is that the Swedish krona has been weak, although it has rallied. Another reason for the higher costs may be that households have become more affluent and can therefore pay extra for the service they desire, such as more rapid or environmentally offset deliveries. Media coverage of increased tariff costs is also likely to affect consumer perceptions, despite the fact that the increases have not yet entered into force. Finally, changes in campaign patterns with major market participants offering fewer discounts are also a possible cause.

There is currently great uncertainty in the global market – particularly in terms of tariffs and other trade barriers. As each country has its own specific circumstances, it is not possible to draw a general conclusion about foreign e-commerce. Markets must be analyzed individually.

## Consumers' most recent online purchase from abroad



Basis: Consumer, has made online purchases from abroad in the last year

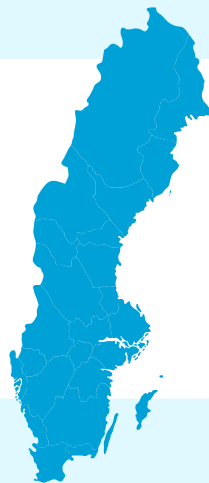
					
	China	Germany	UK	USA	Denmark
Percentage of most recent online purchase from abroad	25% (24%)	19% (20%)	9% (10%)	9% (8%)	8% (8%)
Average receipt	SEK 550 (SEK 629)	SEK 1,359 (SEK 1,221)	SEK 1,163 (SEK 1,220)	SEK 1,388 (SEK 1,019)	SEK 1,230 (SEK 1,229)

Basis: Consumer, made their most recent online purchase from abroad from each country  
Results for 2024 are given in brackets



## What consumers mainly associate with Swedish online stores

- |                                 |     |
|---------------------------------|-----|
| 1. Convenient payment solutions | 56% |
| 2. Relevant delivery options    | 45% |
| 3. Accessible customer service  | 35% |



Basis: Consumers who have shopped online

## What consumers mainly associate with foreign online stores

- |                           |     |
|---------------------------|-----|
| 1. Low prices             | 49% |
| 2. Wide range of products | 44% |
| 3. Unique products        | 32% |



Basis: Consumer, has made online purchases from abroad

# Swedish and foreign e-commerce – convenience versus price

This year, 35 percent of e-retailers say they feel that competition from foreign e-retailers has increased. At the same time, it is clear that consumer perceptions of Swedish and foreign e-retailers differ, which means that each market has its own advantages and disadvantages.

Swedish e-commerce is associated with a seamless and convenient purchase journey. Consumers feel that Swedish online stores stand out due to factors ranging from relevant payment and delivery options to accessible customer service. Foreign online stores are associated with attractive ranges at low prices. According to last year's [E-barometern for Q1](#), consumers and businesses share this view; six in ten e-retailers see low prices as the main competitive advantage of foreign market participants.

According to a report by Svea Bank, the prices of foreign low-price giants

risk generating unrealistic expectations among Swedish consumers about the prices of Swedish e-retailers.<sup>1)</sup> This is because many of the market participants offering the lowest prices do not comply with EU legislation in areas such as product safety.

It is crucial that Swedish e-retailers continue to meet the requirements for a convenient shopping experience, especially as this is increasingly becoming more of a hygiene factor requirement rather than a factor motivating consumers. For example, niche market participants often benefit from building loyalty through communities and strong customer relationships, while those in the low-price segment need to focus on offering a broad product range and a high level of availability to compete in a global market. Different positions require different strategies – but must always focus on customer needs.

<sup>1)</sup> Svea Bank, Q4 2024

# Chinese market participants improving the delivery experience

Over the past year, Chinese e-retailers have been a hotly debated topic among consumers and other e-retailers alike. Despite extensive criticism regarding factors including product content, increasing numbers of consumers are continuing to make purchases from Chinese market participants in the low-price segment, with price being a decisive factor.

Chinese e-retailers have improved their delivery experiences. Slightly fewer consumers report having problems with their most recent delivery, and delivery times have decreased by one day on average. These are two factors that are traditionally important to consumers. One of the most popular Chinese market participants, Temu, has also announced that it will be opening a warehouse in Sweden, meaning it will be able to further shorten lead times in the future.<sup>1)</sup> Chinese e-retailers have thus become better at offering deliveries that Swedes find appealing.

However, one obstacle that foreign e-retailers must overcome is the perception that the cost of shipping and customs duties, for example, has increased by over 50 percent. One reason for this is that market participants that previously attracted consumers with campaign offers such as free shipping have scaled back their offers as they have gained a foothold in the market. Low price remains the main reason consumers make online purchases from China. If costs additional to that of the item increase, this could put the brakes on interest in Chinese market participants in the low-price segment going forward.

Chinese market participants are no longer competing on price alone, but are also working to make the consumer experience more convenient – for example, by improving the delivery experience and offering a wide range of payment methods. They are thus strengthening and expanding their offering, making them more attractive to consumers.



Average receipt:

**SEK 550**

2024: SEK 629

Average cost over and above the price of the item (shipping, customs duties, etc.):

**SEK 57**

2024: SEK 37

Main reason for consumers to buy from China:

"Lower prices" **66%** (65%)

Consumers' favorite items to buy from China:

Clothing & footwear **28%** (26%)

Home electronics **11%** (13%)

Furniture & home furnishings **8%** (6%)



**29%** (26%)

of women made their most recent purchase from abroad from China



**21%** (22%)

of men made their most recent purchase from abroad from China

**92%**

of consumers had **no problem with their most recent delivery from China** (91%)

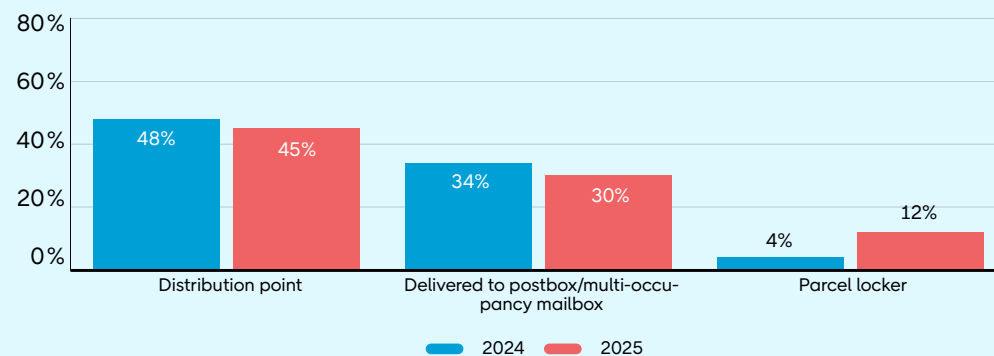


Average delivery time:

China: **15 days** (16)

Sweden\*: **4 days** (4)

## How consumers had their most recent online purchase from China delivered



Basis for all unless otherwise stated: Consumer, made their most recent online purchase from abroad from China

\*Basis: Consumer, has shopped online. Source: E-barometern Q2 2024

Results for 2024 are given in brackets

# Tough years for Germany

Germany's economy is struggling, and as the country has long been one of Sweden's most important trading partners, this impacts Sweden. Germany has also long been a key shopping destination for Swedish consumers, both in-store and online. However, in recent years, the direct importance of the country in terms of consumers' e-commerce consumption has declined. This year, the percentage of consumers who made their most recent online purchase from abroad from Germany was the lowest since measurements began in 2019.

As well as fewer people making online purchases from Germany, people are increasingly experiencing problems with their deliveries from the country. This year, almost one in ten had problems with their most recent delivery, compared to almost flawless deliveries last year.

However, one thing that remains unchanged is that the vehicle category is one of the most common categories in which online purchases from Germany

are made, setting the country apart from other markets. However, the significance of this category has decreased compared to last year – from second to third place. One explanation for this is the modernization of the vehicle fleet, with the proliferation of electric vehicles meaning that servicing needs to be performed at a workshop to a greater extent, and that the wear on certain parts, such as brakes, is lower.<sup>1)</sup>

Germany remains a key e-commerce country for Swedish consumers, but there are signs that challenges lie ahead. At the same time, there are circumstances with the potential to create opportunities. More than half of those who made purchases from Germany did so because German e-retailers offer products not available in Sweden. With rising trade barriers and a growing focus on the EU single market, there is potential for the country to become an obvious e-commerce destination once again for Swedish consumers on the hunt for hard-to-find items.



Average receipt:

**SEK 1,359**

2024: SEK 1,221

Average cost over and above the price of the item (shipping, customs duties, etc.):

**SEK 130**

2024: SEK 50

**Main reason for consumers to buy from Germany:**

"The items were not available on Swedish sites" **52%** (56%)

**Consumers' favorite items to buy from Germany:**

Clothing & footwear **25%** (21%)

Home electronics **12%** (11%)

Vehicles **11%** (16%)

**13%**  
(15%)

of women made their most recent purchase from abroad from Germany

**24%**  
(23%)

of men made their most recent purchase from abroad from Germany

**92%**

of consumers had **no problem with their most recent delivery from Germany** (97%)

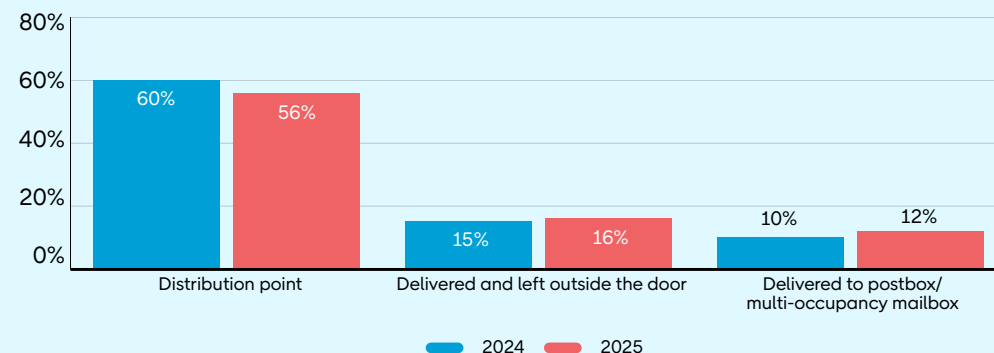


Average delivery time:

Germany: **7 days** (7)

Sweden\*: **4 days** (4)

## How consumers had their most recent online purchase from Germany delivered



Basis for all unless otherwise stated: Consumer, made their most recent online purchase from abroad from Germany

\*Basis: Consumer, has shopped online. Source: E-barometern Q2 2024

Results for 2024 are given in brackets



# United Kingdom – impact of trade barriers

Interest in UK e-commerce has declined among Swedish consumers since Brexit. The UK's withdrawal from the EU resulted in trade barriers such as tariffs increasing costs for consumers, causing them to change their purchasing habits.

In 2019, before Brexit, the UK was the country from which Swedes preferred to make online purchases. To put this in perspective, it is now about as common to have purchased from Denmark as from the UK, whereas five years ago there was a 19 percentage point difference between the two countries.

Besides the fact that fewer and fewer people are making online purchases from UK market participants, those who do so also experience trade barriers. Last year's [E-barometern for Q1](#) talked about major cost increases for customs duties and shipping, and this continues to be the case this year.

For consumers making online purchases from the UK, unique and hard-to-find products are increasingly driving purchases from the country. The percentage of consumers who made purchases in the UK to find items not available in Sweden has increased by ten percentage points since last year. This suggests that shoppers are more than willing to pay – as long as they find what they are looking for.

What has happened to e-commerce from the UK could be a taste of things to come if trade barriers from the US are perceived to be too high. Fewer consumers making online purchases from the country, higher costs and stronger incentives to shop there are thus some of the anticipated consequences.



Average receipt:

**SEK 1,163**

2024: SEK 1,220

Average cost over and above the price of the item (shipping, customs duties, etc.):

**SEK 246**

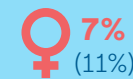
2024: SEK 95

## Main reason for consumers to buy from the UK:

"The items were not available on Swedish sites" **81%** (71%)

## Consumers' favorite items to buy from the UK:

Clothing & footwear	<b>25%</b> (38%)
Media	<b>12%</b> (15%)
Beauty & health	<b>12%</b> (7%)



**7%** (11%)

of women made their most recent purchase from abroad from the UK



**11%** (10%)

of men made their most recent purchase from abroad from the UK

**88%**

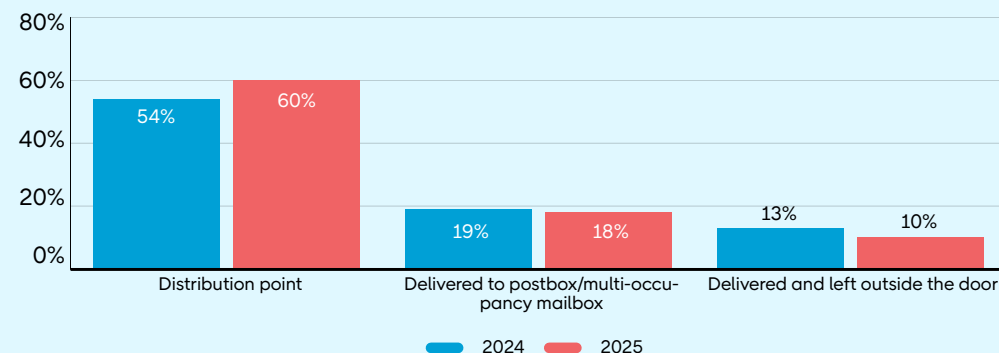
of consumers had **no problem with their most recent delivery from the UK** (92%)



Average delivery time:

**UK:**  
**10 days** (11)  
**Sweden\*:**  
**4 days** (4)

## How consumers had their most recent online purchase from the UK delivered



Basis for all unless otherwise stated: Consumer, made their most recent online purchase from abroad from the UK

\*Basis: Consumer, has shopped online. Source: E-barometern Q2 2024

Results for 2024 are given in brackets

# Uncertain outlook for US E-Commerce

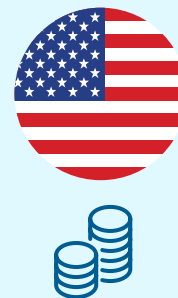
The United States is a country that has historically accounted for a stable proportion of consumer e-commerce from abroad. Last year, however, the country, like many other countries, was negatively affected by the rise of China. This year there have been no major changes – about the same number of people made their most recent foreign purchase from the United States as last year. It is worth mentioning that, at the time of this consumer survey, no tariff increases had yet entered into force. Looking ahead, there is a risk that raised trade barriers will lead to lower e-commerce activity from the US.

The US is the country from which consumers are experiencing the greatest increase in terms of delivery time and costs such as customs duties and shipping. The market is in a state of flux and, at the time when consumer responses were obtained, the Swedish krona was weak, which is one of the reasons for this. Another reason could be that consumers had already started to view

the United States as a more expensive trading destination, even though the tariffs had not yet entered into force. Put simply, consumers may have become more aware of the costs associated with foreign e-commerce.

Swedish consumers often turn to the US for items not available in Sweden. There are many examples of brands and products that go viral on social media but are only sold in the US, at least initially. Stanley Cup thermos mugs, Touchland hand sanitizer and Bloom and Lemme Chill nutritional supplements are a few examples.

What the future holds for American e-commerce in Sweden is difficult to predict. However, it is likely that the consumer relationship with e-commerce from the US will change. In all likelihood, fewer consumers will make online purchases from the country due to trade barriers, but among those who do shop from the US, unique and hard-to-find items will be an even more crucial driver.



Average receipt:  
**SEK 1,388**

2024: SEK 1,019

Average cost over  
and above the price  
of the item (shipping,  
customs duties, etc.):

**SEK 413**

2024: SEK 111

## Main reason for consumers to buy from the US:

"The items were not available on Swedish sites" **72%** (80%)

## Consumers' favorite items to buy from the US:

Clothing & footwear	<b>22%</b> (22%)
Media	<b>11%</b> (15%)
Home electronics	<b>9%</b> (7%)



**9%** (9%)

of women made their most recent purchase from abroad from the US



**9%** (8%)

of men made their most recent purchase from abroad from the US

**86%**

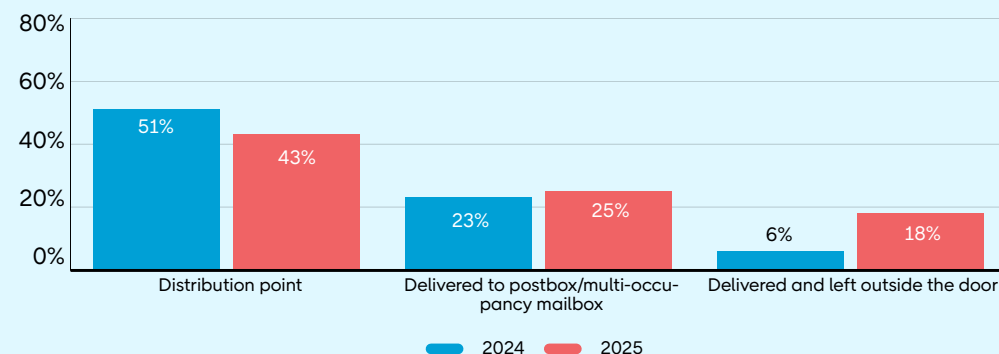
of consumers had **no problem with their most recent delivery from the US** (84%)



Average delivery time:

**USA:**  
**21 days** (15)  
**Sweden\*:**  
**4 days** (4)

## How consumers had their most recent online purchase from the US delivered



Basis for all unless otherwise stated: Consumer, made their most recent online purchase from abroad from the US

\*Basis: Consumer, has shopped online. Source: E-barometern Q2 2024

Results for 2024 are given in brackets

# Denmark – a secure e-commerce destination

In a time of great global uncertainty, e-commerce from Sweden's neighbor Denmark remains stable. Since 2019, the percentage of Swedish consumers who made their most recent purchase from the country has almost doubled, from five percent to eight percent. Last year, e-commerce from Denmark was one of the few segments to grow despite the rise of China.

Denmark's proximity to Sweden makes it a relatively easy country for Swedish consumers to make online purchases from. Danish e-commerce operators are seen as being clear in their communication; almost nine in ten consumers who made purchases from the country felt that the final price in Swedish kronor was clear. Among the countries from which it is most common to make online purchases, Danish e-retailers are also mainly associated with accessible customer service and relevant delivery options.

This year, clothing and footwear have taken the top spot among the items most frequently purchased from Denmark, while purchases of home electronics and furniture have declined. Danish design in the spheres of fashion, home electronics and interior design has long been popular, but now consumers are focusing more on updating their wardrobe. One reason is that clothing and footwear are less capital-intensive items than home electronics and furniture, which, combined with a weak krona, has led to a decline in interest in the latter product categories.

As the krona strengthens and trade barriers and geopolitical concerns shape the global market, Swedish consumers may find Danish e-commerce increasingly attractive. Denmark's geographical proximity, clear terms and conditions and unique product range make the country an accessible and attractive option.



Average receipt:  
**SEK 1,230**

2024: SEK 1,129

Average cost over  
and above the price  
of the item (shipping,  
customs duties, etc.):

**SEK 59**

2024: SEK 37

## Main reason for consumers to buy from Denmark:

"The items were not available on Swedish sites" **50%** (55%)

## Consumers' favorite items to buy from Denmark:

Clothing & footwear	<b>30%</b> (15%)
Home electronics	<b>12%</b> (18%)
Furniture & home furnishings	<b>8%</b> (12%)



**9%**  
(8%)

of women made  
their most recent  
purchase from  
abroad from  
Denmark



**7%**  
(8%)

of men made  
their most recent  
purchase from  
abroad from  
Denmark

**94%**

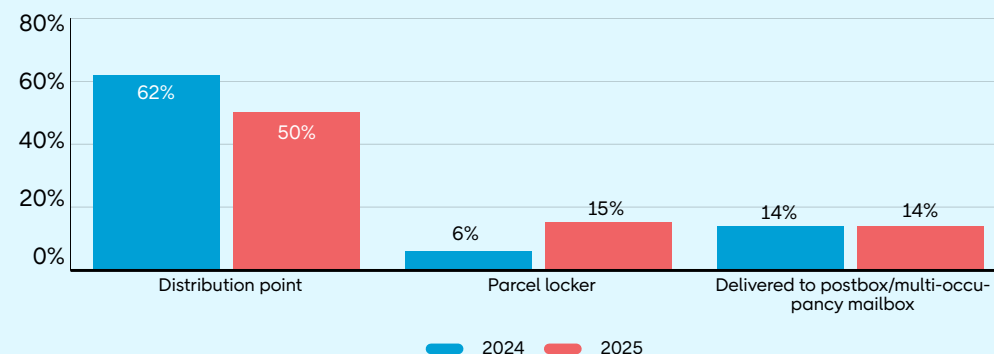
of consumers had **no**  
problem with their most  
recent delivery from  
Denmark (95%)



Average delivery  
time:

Denmark:  
**9 days** (6)  
Sweden\*:  
**4 days** (4)

## How consumers had their most recent online purchase from Denmark delivered



Basis for all unless otherwise stated: Consumer, made their most recent online purchase from abroad from Denmark

\*Basis: Consumer, has shopped online. Source: E-barometern Q2 2024

Results for 2024 are given in brackets



# Young people going against the trend – fewer online purchases from abroad

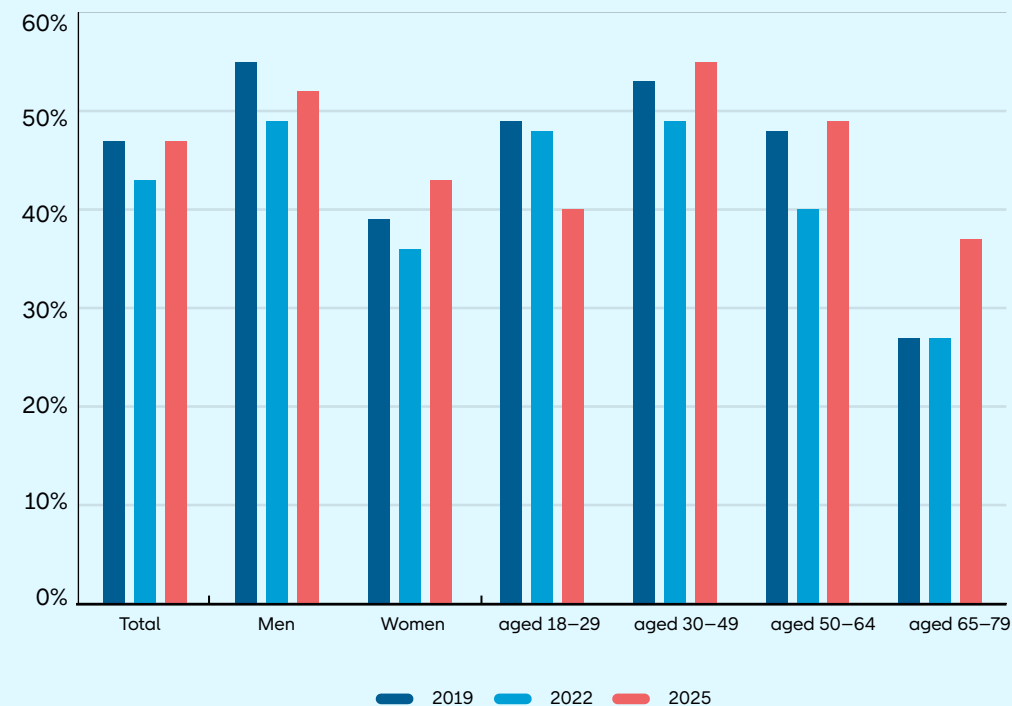
Foreign market participants are clearly popular among Swedish consumers. In [the E-barometer Annual Report](#), participants such as Temu, Zalando, Vinted and Amazon were among consumers' online favorites. Almost half of consumers, men and women of all ages, have made online purchases from abroad over the past year.

Looking more closely at the different generations, those aged between 30 and 49 are the most likely to have made online purchases from abroad, with this already being the case in 2019. Over time, there is greater interest in international e-commerce in all age groups – except among the youngest. Interest has waned in that age group, with fewer making online purchases from abroad this year compared to 2019 and 2022. One explanation is that young people increasingly shop second-hand, giving them access to unique products at a reasonable price – something that otherwise entices people to make purchases from abroad.

The country from which consumers make purchases also varies. For example, the oldest age group and women stand out regarding the extent to which they have made online purchases from China. Four in ten people aged 65 to 79 made their most recent purchase from China, a significantly higher proportion than in other age groups.

It is likely that more than 47 percent of consumers have made online purchases from abroad in the past year. Eight percent of consumers say they do not know whether they have made such purchases from a Swedish or a foreign e-commerce website. This is particularly unclear to older consumers, with more than one in ten consumers over the age of 65 saying they did not know if they made their most recent purchase from a foreign e-retailer. Many online stores abroad are designed to appear to have a Swedish dispatcher, making it difficult for consumers to know from where they are actually making their purchases.

## Consumers who have purchased from abroad in the last year

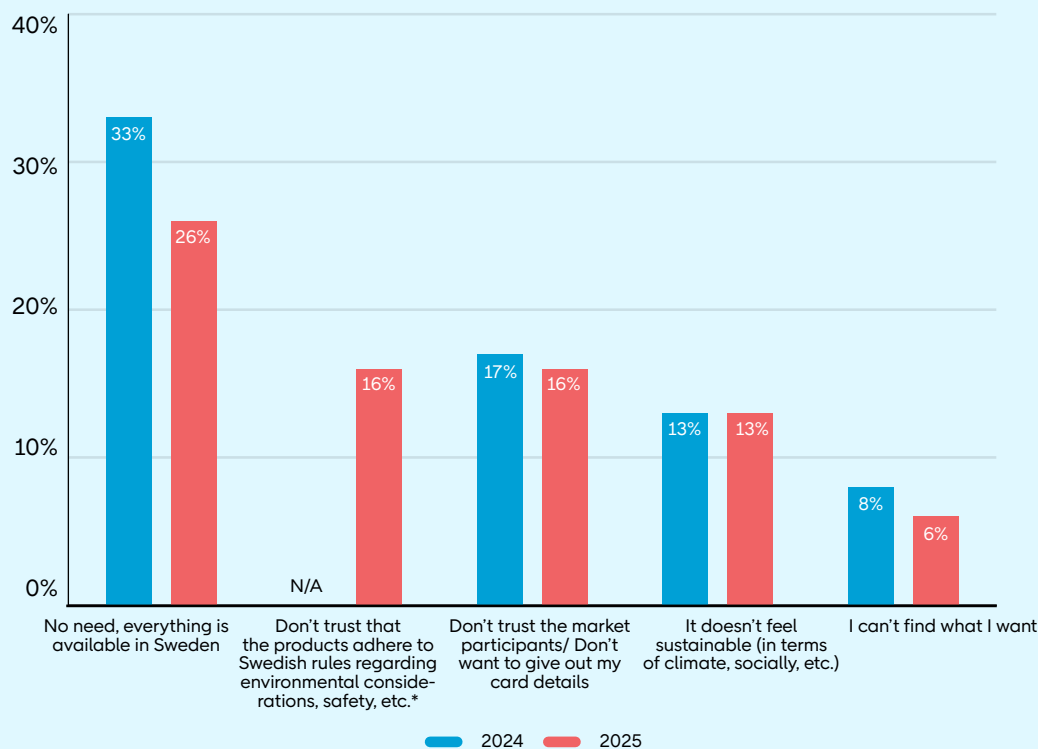


Basis: Consumers who have shopped online

44%

of consumers have **not**  
made online purchases  
from abroad in the last  
year\*\*

## Main reasons why consumers choose not to make purchases from abroad



Basis: Consumer, has not made purchases from online stores abroad in the last year

\*New response option in 2025

\*\*Basis: Consumers who have shopped online

## Trust and sustainability key competitive advantages

Despite the fact that increasing numbers of consumers are making online purchases from abroad, there are several obvious reasons why many are still refraining from doing so.

A key element of the debate on online purchases from abroad, particularly in the case of Chinese market participants in the low-price segment, is that these companies do not have to consider the common regulatory framework applicable in the EU. Swedish commercial firms must adhere to different regulations regarding aspects such as product safety and chemical content than their Chinese competitors.<sup>1)</sup> This risks products being imported that may be deficient in terms of safety and sustainability, which is reflected in consumer perceptions of foreign e-commerce. Sixteen percent of consumers doubt that products from abroad live up to Swedish requirements as regards environmental considerations, safety and chemical content.

There are other factors that discourage

consumers from making purchases from abroad. For example, there is uncertainty as to how payment details are processed in international purchases. Sustainability also plays a key role when consumers decide to avoid making purchases from abroad.

Swedish e-retailers have an opportunity to set themselves apart by being transparent, trustworthy and demonstrating a clear sustainability focus – important competitive advantages in an era when conscious consumption is becoming increasingly important.

However, a competitive offering is what is ultimately crucial to retaining loyal customers and boosting Swedish e-commerce. The percentage of consumers who consider that they do not need to make purchases from abroad because everything they need is already available in Sweden has fallen since last year. This implies that Swedish e-retailers are not fully meeting consumer demand. If this trend continues, there is a risk that more people will go for international options.

<sup>1)</sup> Svensk Handel

## Sustainability gaining in importance

Turbulent times due to the pandemic and economic uncertainty have affected consumer behaviors and priorities. Interest in sustainability issues has remained relatively stable in recent years, but this year it has clearly grown.

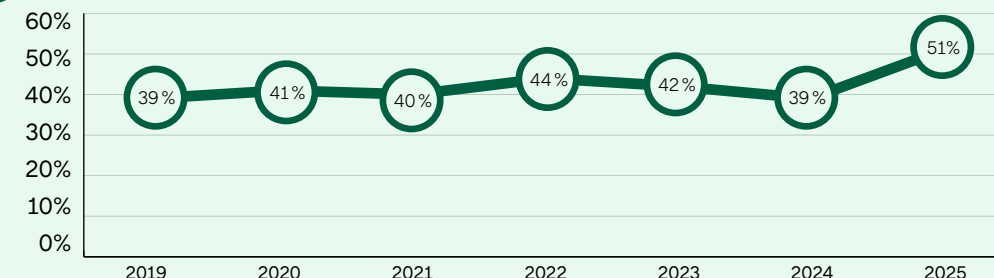
The E-barometer in Q1 2024 showed that sustainable e-commerce has been under economic pressure. With less money left over after interest rate hikes and price increases, consumers have become more restrained in their spending, and sustainability has become secondary to price. The year started with a sense of optimism about the economy<sup>1)</sup> and as economic conditions have improved, it is clear that people are increasingly focusing on sustainability. More than half of consumers say they often or always make conscious choices related to sustainability when purchasing items online. Increasing numbers of people are considering environmental impact, sustainability and working

conditions in their purchasing decisions. Among those who make conscious choices when purchasing online, social sustainability is the factor assigned most weight – meaning that the people who produce the items are offered fair working conditions and employment terms. Materials and origin also play a significant role.

Overall, the trend is towards a more conscious consumer, but developments are not clear-cut. Consumers are increasingly buying from international low-price giants not primarily associated with sustainability. This suggests that different groups have different motivations and that priorities and the importance assigned to sustainability vary depending on who is making the purchases and what is being purchased. Moreover, the same consumer may act differently in different situations – conscious choices in one context may be replaced by convenience or a focus on price in another.

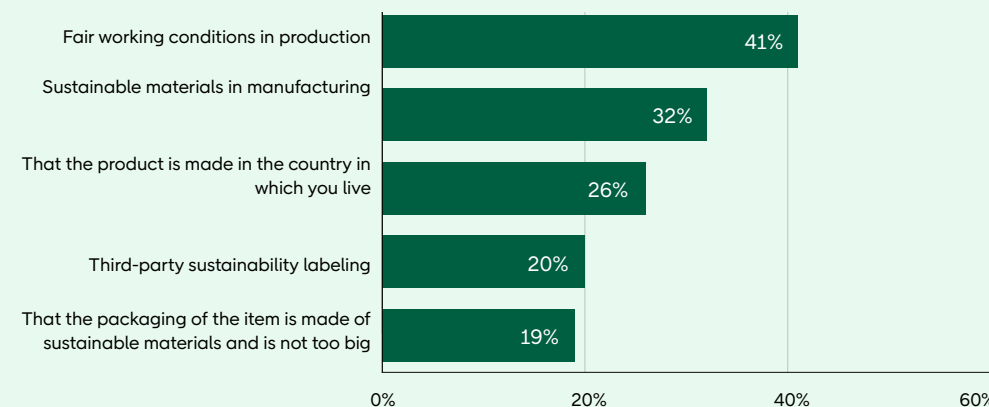
**77%**  
of e-retailers  
work actively with  
sustainability\*

### Percentage making conscious choices regarding sustainability aspects when shopping online



Basis: Consumers who have shopped online

### What factors are given most weight when making a sustainable e-commerce choice?








Basis: Consumer, makes sustainable choices when purchasing items online

\*Basis: All e-retailers

<sup>1)</sup> National Institute of Economic Research



Top 5 sectors in which sustainability matters most\*

	2023	2025
 1. Clothing & footwear	41%	46%
 2. Food	29%	25%
 3. Beauty & health	15%	18%
 4. Children's items & toys	11%	18%
 5. Home electronics	21%	15%

Basis: Consumers who have shopped online  
\*Percentage of consumers who think it is important that the products are manufactured and delivered with the highest possible level of consideration for sustainability

# Consumers want to prioritize sustainability – but price matters

Sustainability is a key aspect for many consumers, but its importance varies across product categories and target groups. What is being purchased and by whom has a major impact on how sustainability is prioritized in the purchase.

Clothing and footwear is the category in which sustainability is considered to be most important, reflecting the frequency with which purchases in this category are made. As this is a popular online category, with purchases made on a regular basis, consumers are more conscious of the sustainability aspect. In addition, the issue of sustainability in textile management is highly topical, with new regulations in this area reinforcing this further. Since January 1, 2025, households and businesses in the EU have been required to collect textile waste separately. This in turn is an initial step towards what is termed producer responsibility for textiles.<sup>1)</sup>

When it comes to food, it is clear that many consumers want to prioritize sustainability – but are limited by the money in their pockets. According to Svensk Handel's latest sustainability survey,

price has for the first time superseded sustainability in terms of importance when making food purchases.<sup>2)</sup> Rising food prices thus mean that sustainability is assigned lower priority. The same trend can be seen in other capital-intensive product categories such as home electronics, where price is often assigned more weight than sustainability.

Different target groups have different sustainability preferences. Women are more likely than men to make conscious choices when shopping. There are also variations between age groups. For those aged 30–49, many of whom have young children, sustainability is particularly important when buying children's products and toys.

In summary, sustainability is the top priority when it comes to choices related to what is closest to our bodies and what we eat, such as clothing, beauty and health, as well as food. However, it is worth bearing in mind that price is still a key factor, which means that interest in sustainability in a particular product category may depend on how much money the consumer has in their pocket.

<sup>1)</sup> Svensk Handel <sup>2)</sup> Svensk Handel's sustainability survey 2024/2025

22%

would be likely to  
abandon a purchase for  
sustainability reasons\*

## Lack of clarity in sustainability communication damages trust

Sustainability is a broad concept, which makes communication on sustainability a complex matter. As consumer interest in this area grows and the number of rules and regulations increases, so too does the need for e-retailers to communicate clearly about sustainability.

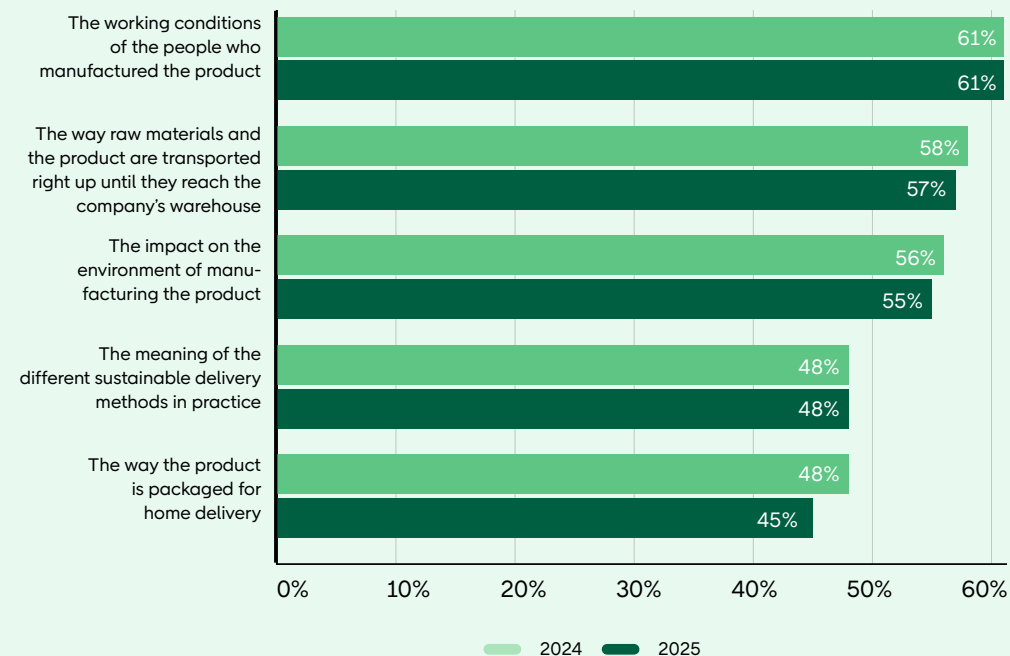
Despite the importance of communication on sustainability, consumers making online purchases often feel that the information is inadequate. Among consumers who to some extent make sustainable choices in e-commerce, social sustainability, such as the working conditions of those who manufactured the product, is the factor they prioritize the most. At the same time, it is precisely this area that is perceived as being the most unclear. A full six in ten consumers say that information on the working conditions of those who manufactured the product was not clearly displayed on the

website from which they made their most recent purchase. Many consumers also see information on transportation and manufacturing as being unclear.

A lack of transparency has consequences. A full 22 percent of consumers are likely to abandon a purchase for sustainability reasons, such as the delivery being too harmful to the environment or there being non-existent or insufficient information on climate impact. This indicates how strong the link is between clear communication and conversion.

It is therefore becoming increasingly important that e-retailers not only work on sustainability, but also communicate their efforts in a credible, tangible and accessible way. A lack of clarity risks impacting consumer confidence and purchase decisions.

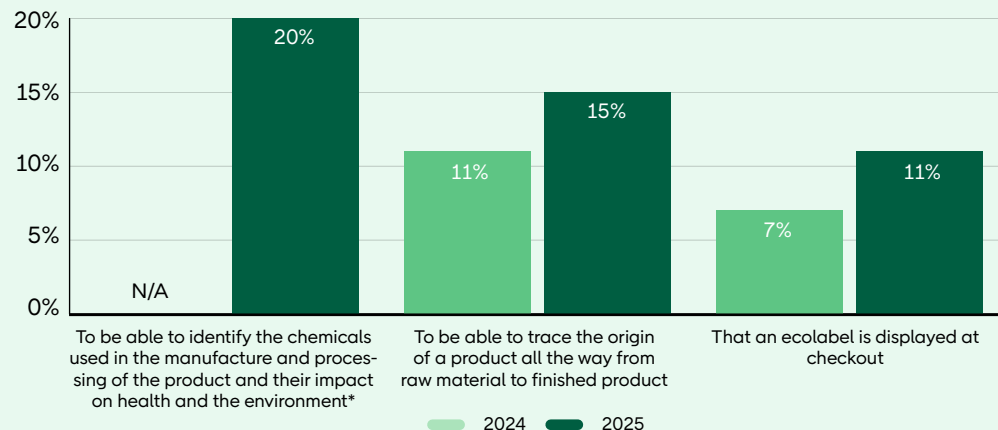
### Perceived lack of clarity on the website when making most recent purchase



Basis: Consumers who have shopped online

\*Basis: Consumers who have shopped online

## Percentage who consider it crucial...



Basis: Consumer, has shopped online.

\*New response option in 2025

**The European Green Deal** – the EU's comprehensive strategy to make the EU the world's first climate-neutral continent by 2050. The initiative encompasses a wide range of legislation that imposes various requirements on companies in the EU. The plan affects all parts of the economy – from investment and production to consumption and technology development.<sup>1)</sup>

**Substantiating Green Claims** – Aims to counteract vague or unsubstantiated environmental claims and ensure that a third party reviews and approves them.<sup>1)</sup>

**Digital Product Passport** – A digital tool linked to each individual product, containing detailed information on its entire life cycle – from manufacturing and material content to use, repair and recycling.<sup>2)</sup>

## EU setting requirements for e-commerce

E-retailers are obliged to comply with a large number of EU regulations, and even more regulations are in the pipeline due to the European Green Deal. In parallel with EU legislation, consumers also have higher expectations in relation to e-retailers.

Increasing numbers of consumers consider ecolabels at checkout to be crucial, along with the ability to trace a product's origin from raw material to finished product. These aspects are linked to forthcoming regulations such as Green Claims and the Digital Product Passport. Green Claims will ensure that environmental claims are third-party verified<sup>1)</sup>, and the Digital Product Passport will provide traceability from raw material to finished product.<sup>2)</sup> Chemical content is also a crucial consideration for many consumers, with one in five wishing to know what chemicals are

used and how they impact health and the environment. Although this is already regulated within the EU, many products from non-EU countries do not meet the same requirements. Complying with regulations and competing with market participants operating in a global low-price market poses a challenge to EU e-retailers.

EU regulations, both existing and forthcoming, go hand in hand with consumer demands. New regulations will mean major changes for many e-retailers. Many will need to adapt their products and business models to meet the new requirements, but also to be competitive. There is thus a built-in challenge for e-retailers – regulations can entail higher costs, and even if consumers demand greater sustainability, they are often unwilling to pay a higher price for it.<sup>3)</sup>

<sup>1)</sup> European Commission <sup>2)</sup> GS1 Sweden <sup>3)</sup> Dagens Industri, March 2025



# Sustainable deliveries gaining in importance

As consumers become more environmentally conscious, sustainable deliveries are becoming an increasingly important part of the purchase experience.

Consumers are increasingly switching to a more sustainable delivery method at checkout. Despite this, almost half of consumers said that when they last made an online purchase, it was not particularly clear what sustainable delivery methods such as carbon offset, fossil-free or eco-friendly actually meant.

Third-party ecolabels such as the Nordic Swan Ecolabel help consumers choose a delivery option that meets stringent requirements regarding climate performance and high energy efficiency. The new sector agreement for fossil-free deliveries, initiated by Svensk Handel, also aims to provide a clearer picture by defining what a fossil-free delivery means. Common definitions and verified

certifications are thus replacing ambiguous environmental concepts.<sup>1)</sup>

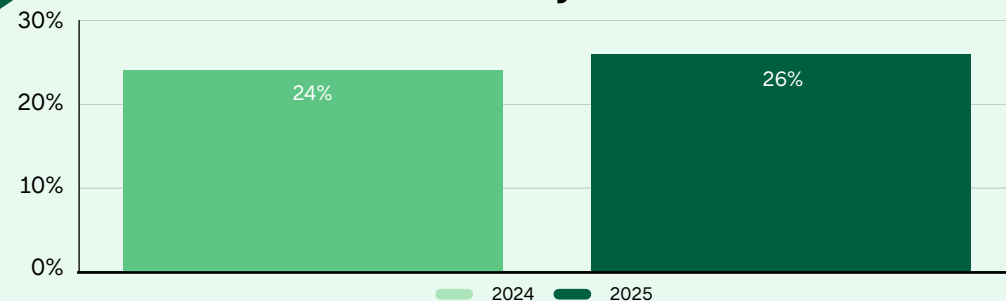
In addition, increasing numbers of consumers find it crucial to be able to see the environmental impact of the product in the delivery options. This is an aspect that is becoming even more central due to the EU's new Corporate Sustainability Reporting Directive (CSRD), which aims to improve the quality, comparability and transparency of sustainability information, including that stemming from the supply chain.<sup>2)</sup>

Clarifying the terminology and the impact of deliveries on the environment will enable consumers to make more sustainable choices. Common definitions and credible certifications strengthen trust in sustainable options and are likely to ensure that more people actually select them.

## 48%

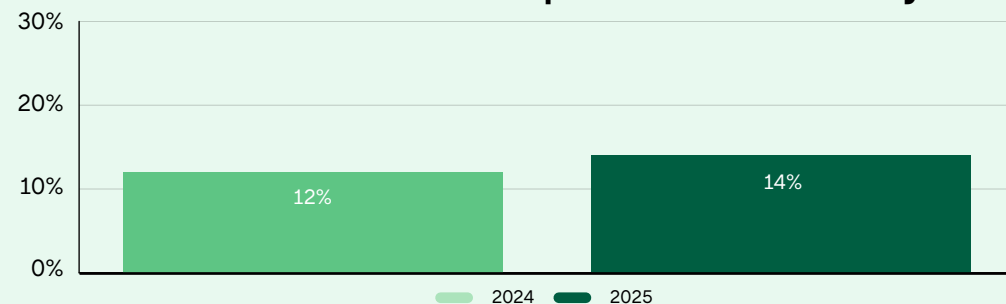
felt when making their most recent online purchase that it was **unclear what sustainable delivery actually means\***

## Percentage of people who usually switch to a more sustainable delivery method at checkout



Basis: Consumers who have shopped online

## Percentage who think it is essential to see the environmental impact of the delivery



**CSRD** (*Corporate Sustainability Reporting Directive*) – requires companies to report their sustainability impacts in a more detailed, comparable and verifiable way. It encompasses the entire value chain, which includes logistics and deliveries.<sup>2)</sup>

Basis: Consumers who have shopped online

\*Basis: Consumers who have shopped online

## Second-hand C2C commerce – the biggest circular model

Circular offerings online cover a wide variety of services, functions and business models. There are three main types of circular offerings: second-hand sales, rentals and repairs. What they all have in common is that they aim to offer alternative ways of consuming new items. However, the way consumers take advantage of circular e-commerce offerings has changed over time.

The most common offering is to buy and sell items second hand straight from another consumer. However, it has become increasingly common for consumers to make use of platforms that also provide logistics services. The proportion of people who bought or sold a product through a resale service, such as Sellpy, Plick or Vinted, has increased by five percentage points compared to the previous year. Younger consumers in particular are turning to these market

participants, with one in four having used such services in the last three months.

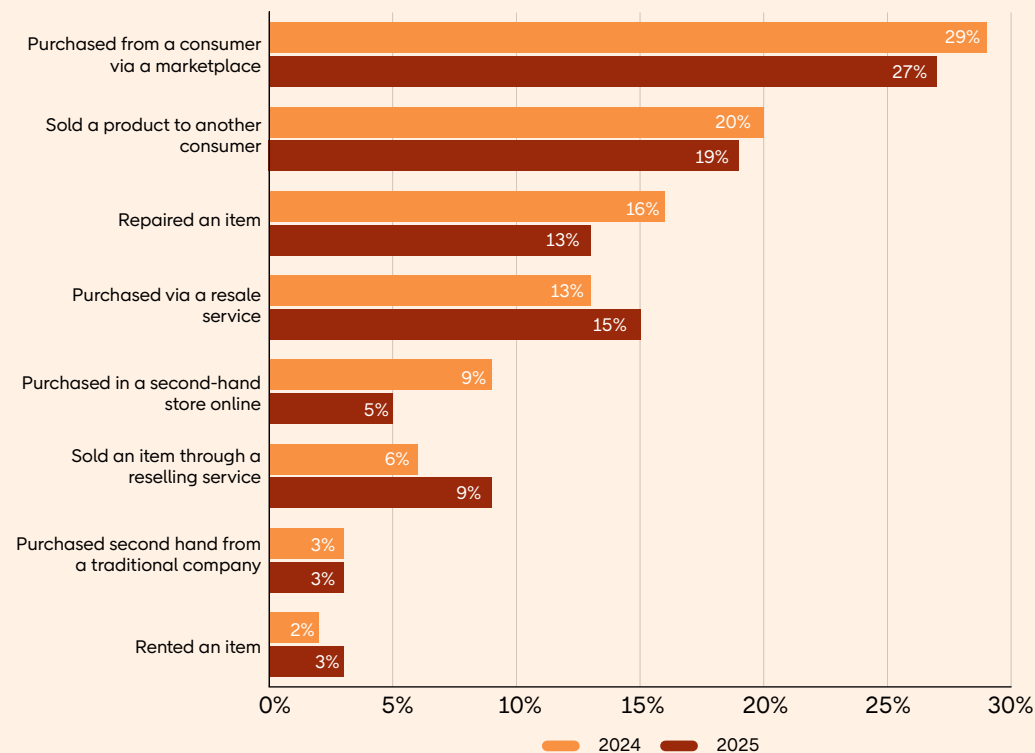
Repairs and rentals are still a relatively minor phenomenon online. However, there are reasons to believe that their share will increase over time. The EU's sustainability efforts include the Right to Repair Directive, which will give consumers the right to repair items to reduce environmental impact.<sup>1)</sup>

In summary, consumer-to-consumer (C2C) sales account for the largest share of online circularity. Only three percent have made purchases from a traditional e-retailer, and e-retailers looking to expand their circular e-commerce business face both challenges and opportunities.

# 49%

of consumers have used circular e-commerce services in the last quarter\*

### Consumers' use of circular offerings online



Basis: Consumer, has shopped online (multiple choice)

\*Basis: Consumer, has shopped online (multiple choice)

## Most common reasons for consumers not buying second hand from traditional e-retailers

1	Did not know that the option existed	22%
2	Prices do not live up to expectations	11%
3	The item could not be purchased from a traditional e-retailer	10%
4	The selected e-retailer had no second-hand offering	8%
5	Range offered is not as good as in other channels	6%
6	Not as convenient as marketplaces focused on second hand	4%

Basis: Consumer, has not purchased second-hand items from a traditional e-retailer

**49%**  
of consumers  
have purchased  
second-hand items

**28%**  
of consumers have sold  
an item via a circular  
marketplace

**15%**  
of e-retailers have a  
circular offering\*

**3%**  
of consumers have  
purchased second-hand  
items from a traditional  
e-retailer

Basis: Consumers who have shopped online

\*Basis: All e-retailers

## Low awareness of second-hand offerings from traditional e-retailers

Consumers rarely avail themselves of the circular offerings of traditional e-retailers. This year, like last year, only three percent of consumers have purchased second-hand items from a traditional e-commerce company.

Consumers say that the biggest obstacle to purchasing second-hand items directly from e-retailers is not knowing that the option exists. Just under one in ten consumers say that the item they wanted to purchase was not available directly from the e-retailer, and just as many say that the e-retailer they wanted to purchase from did not have a second-hand offering.

Today, only 15 percent of traditional e-retailers include second-hand items as part of their offering online. Reasons for this may include logistical challenges, difficulties in scaling up or profitability issues in the circular offering.

However, there are several examples

of companies that already offer second-hand sales via their sales platforms. One example is electrical and white goods retailer Elgiganten Outlet, where the consumer can find second-hand items and filter them based on the item's condition.<sup>1)</sup> Another example is Bubbleroom, which in collaboration with Revive Retail launched Bubbleroom Pre-loved, where the consumer can purchase second-hand items via their website.<sup>2)</sup> A third example is Kjell & Company, which sells second-hand and quality-controlled technology.<sup>3)</sup>

Managing your own second-hand sales requires effort and planning, but when the concept takes off, it can provide a number of benefits. For example, e-retailers can boost their brand, encourage loyalty and generate greater trust in relation to their customers by offering second-hand solutions to complement their regular offering.

<sup>1)</sup> Elgiganten Outlet <sup>2)</sup> Bubbleroom, December 2024 <sup>3)</sup> Kjell & Company

# Price, sustainability and desire make people buy second hand

Consumers purchase second-hand items online for two main reasons: because it is inexpensive and because it is sustainable. Fewer consumers are purchasing second-hand items for price reasons compared to last year, but price is still the main driver. At the same time, the proportion of people purchasing such items for sustainability reasons is increasing, albeit slowly.

Almost a fifth of consumers purchased more second-hand items this year than they did last year. Of these, almost half did so because they feel it saves them money. This again underlines the link between price and second-hand purchases.

Consumers who have purchased more second-hand items online also appreciate other things. In addition to a wider range, sustainability and the fact that it has become easier to find products, one fifth feel it has become more enjoyable to purchase second-hand items online. Like in traditional e-commerce, it is

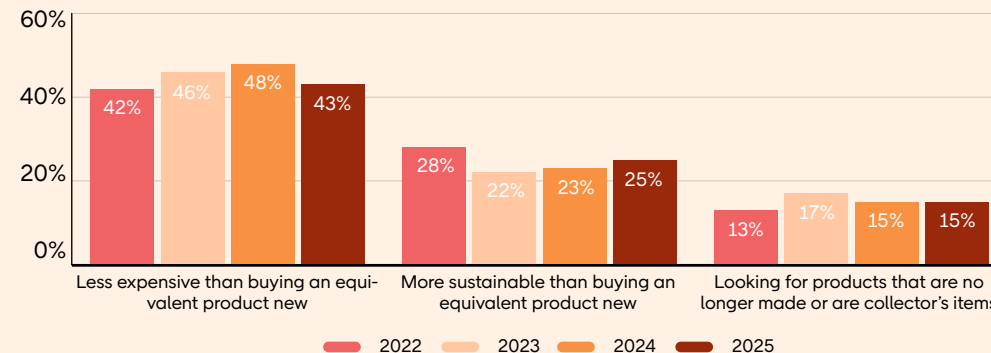
important that the second-hand purchase journey is convenient and efficient, but also enjoyable. Enhancing the purchase experience for the consumer could involve access to a community or personalized offers, for example. This also raises the consumer's expectations of the purchase journey in the long term, something that may also gain in importance in second-hand e-commerce.<sup>1)</sup>

There are several examples of how second-hand market participants are working to improve the online customer experience. One example is the Swappie platform, where consumers can compare the functionality of used mobile phones.<sup>2)</sup> Another example is Relovie, a search engine for second-hand commerce.<sup>3)</sup> Initiatives to improve ease and convenience thus generate willingness to consume more second-hand items.

## 19%

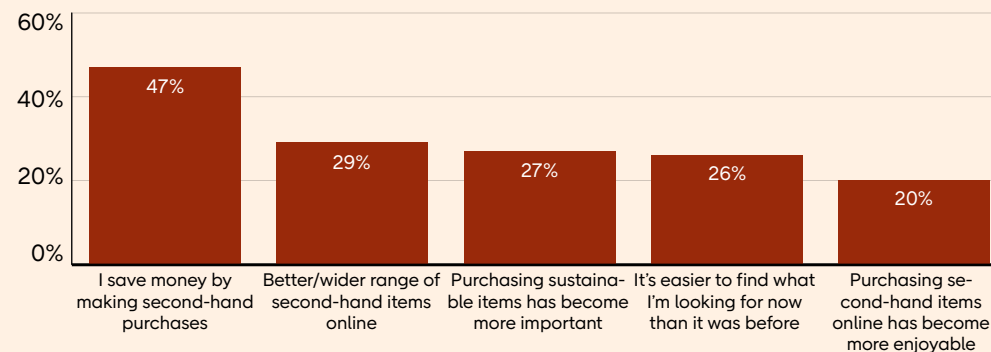
of consumers have purchased **more second-hand items** in the last year\*

## Main reason for purchasing second-hand items online



Basis: Consumers who have shopped online

## Consumer reasons for purchasing more second-hand items



Basis: Consumer, has purchased more second-hand items online in the last year

\*Basis: Consumer, has purchased more second-hand items online in the last year



## Consumers' favorite participants in the second-hand market online

1 Tradera

2 Sellpy

3 Vinted

4 Blocket

5 Facebook Marketplace

Basis: Consumer, has purchased second-hand items online

**SEK 898**

is the average amount spent on second-hand purchases in Q1 2025\*



**41%**

of consumers bought clothing and footwear when they made their most recent second-hand purchase\*

**50%**

of consumers aged 18–29 bought clothing and footwear when they made their most recent second-hand purchase\*



**25%**

of men purchased media when they made their most recent second-hand purchase\*

## Consumers appreciate service in the second-hand sector

Consumers' favorite platforms for purchasing second-hand items online reflect which circular business models they use the most. At the top of the list of their favorite websites is Tradera, followed by Sellpy, Vinted, Blocket and Facebook Marketplace. All platforms allow consumers to both buy and sell items to other individuals, either themselves or via a company that acts as an intermediary.

Consumers appreciate market participants that make it simple and convenient to both buy and sell second-hand items. Tradera and Sellpy offer several different service components in their purchase journeys. For example, consumers only need to have limited or no contact with other buyers and sellers. They also offer easy shipping and delivery solutions at checkout. A third service is technological solutions, such as AI tools, which simplify ad creation.<sup>1)</sup>

Blocket and Facebook Marketplace also offer services that facilitate the use of

their platforms to some extent, but they generally require the consumer to be more active in the process.

There is also other added value, beyond service, that can attract consumers. Plick works with features such as community building, which creates value for a young target audience.<sup>2)</sup> Reach is also a key factor. On Vinted, for example, consumers can buy and sell items to other countries within the EU, broadening the market they have access to.

For established retailers with several key elements in place, such as well-functioning websites, agreements with carriers and different payment options, there is thus an opportunity to create a second-hand store that offers a high level of service that consumers appreciate. As consumer expectations of the purchase journey continue to rise, service will remain important – even in circular commerce.

\*Basis: Consumer, has purchased second-hand items online

<sup>1)</sup> Butikstrender, 2024 <sup>2)</sup> Plick

# Trust is the key to second-hand e-commerce

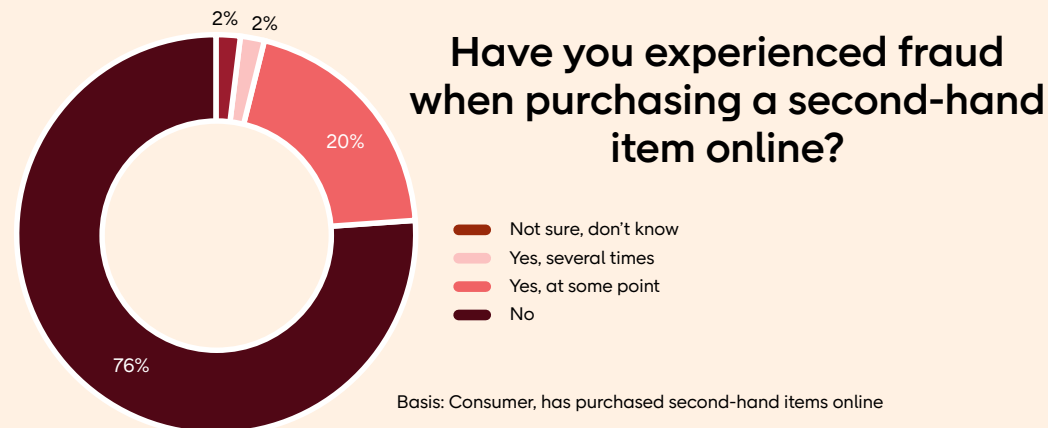
Fraud has been a hot topic in recent years – in commerce in general and in the second-hand sector in particular.<sup>1)</sup> It can take place between businesses, individuals and consumers. One in five consumers have experienced fraud at some point when purchasing second-hand items online.

According to the police, most fraud occurs on C2C platforms and can take different forms.<sup>2)</sup> One example is brand fraud, where both sellers and buyers can defraud and be defrauded. Fraud also takes place via platforms, with people assuming false identities to exploit individuals and access bank details by means of social engineering. The fraudster may then ask the consumer to move to a different platform, where the fraud is then carried out.

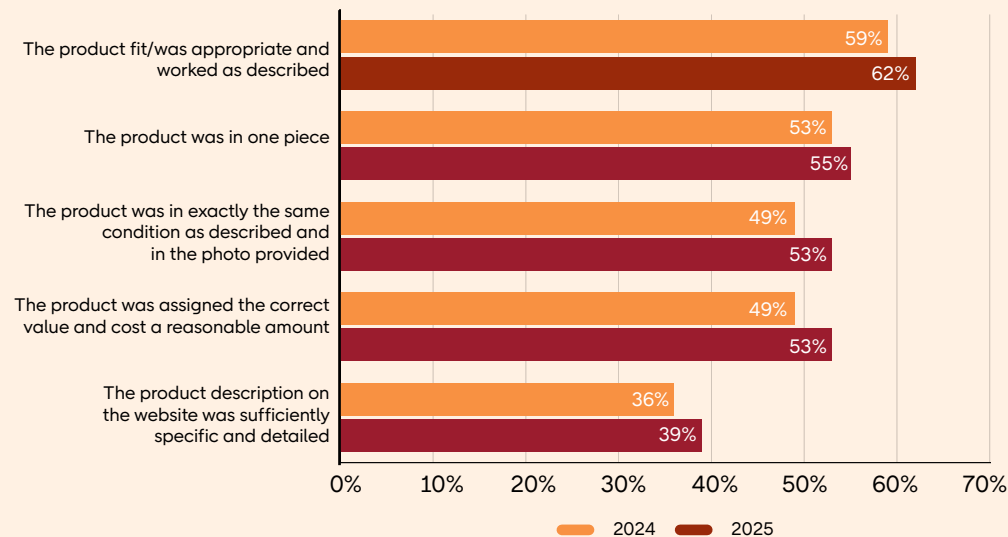
Fake websites are another example of how sophisticated violations can be carried out using advanced technologies, AI and bots. In some cases, third parties can also target websites.<sup>3)</sup>

Seventeen percent of consumers who have purchased more items second-hand over the past year feel more confident about the safety of online purchases. Moreover, an increasing proportion of consumers find that the products they buy second hand live up to their expectations where condition is concerned. This suggests that some consumers are becoming more confident when making second-hand purchases online, but there is still room for improvement.

As the level of professionalization in the second-hand market grows, more people feel assured that the right product will be delivered, that payment solutions are secure and that the quality of the products is guaranteed. Traditional e-retailers have a key role to play in this in terms of setting a standard and creating a secure environment for second hand in e-commerce.



## Consumers' experience during their most recent second-hand purchase online



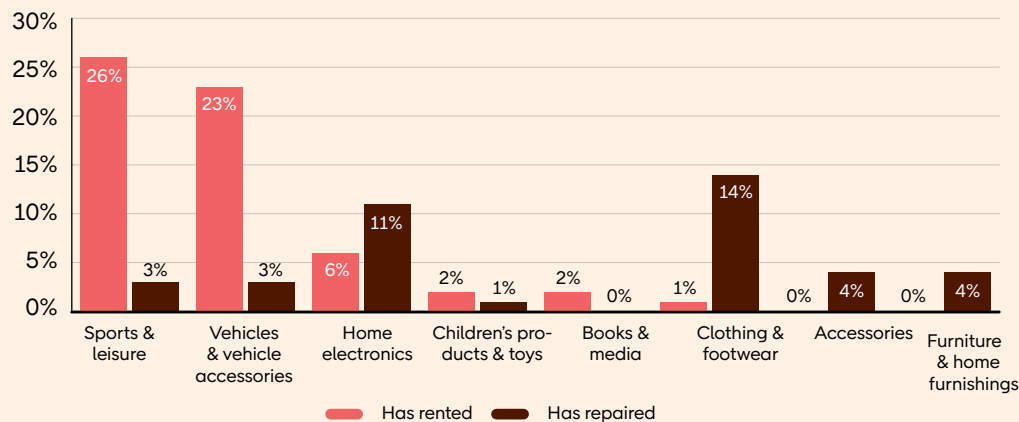
**Right to Repair**

A directive aiming to make it easier for consumers to repair products or replace spare parts, even after the warranty period has expired.<sup>1)</sup>

**13%**  
of consumers use **repair**  
as a circular service  
online (16%)\*

**3%**  
of consumers use  
**rental** as a circular  
service online (2%)\*

### Product categories that consumers have rented or repaired using e-commerce services over the past month



Basis: Consumer, has repaired an item online, has rented via an e-commerce service

\*Basis: Consumers who have shopped online

## Potential for online repairs and rentals still untapped

Rental and repairs remain the circular services in e-commerce that are used the least. Only three percent of consumers have rented an item, and 13 percent have used an e-commerce repair service in the last three months.

Rental in e-commerce is currently limited. Consumers are more willing to rent expensive items that are purchased or used infrequently, such as tools, building accessories or seasonal sports and leisure products. Repair services are mainly used in the clothing and footwear categories, closely followed by home electronics. The Right to Repair Directive will soon make repairs in retail a necessity, enabling more people to repair items in the future.<sup>1)</sup>

Circular services such as rental and repair entail some logistical challenges, but there are benefits for those who

succeed. Houdini has managed to make circularity part of its brand, offering repair services in partnership with Repamera.<sup>2)</sup> If done correctly, this can generate both engagement and customer loyalty while strengthening the brand.

The circular transition also offers potential for e-retailers to develop their omnichannel offerings. Many e-retailers already have a physical presence that can be developed into pick-up/drop-off points for items rented or repaired. One example of this is Veja, which has launched circular services for its sneakers in selected stores.<sup>3)</sup> This results not only in better logistics and availability, but also a stronger and more relevant brand in a market undergoing transition.

<sup>1)</sup> European Commission <sup>2)</sup> Houdini <sup>3)</sup> Veja

# Tariffs redrawing the map – providing opportunities for second hand?

As new tariffs threaten to drive up the price of manufacturing new items in an already shaky economy, new doors are opening for second hand. But many traditional e-retailers have not identified their role in the circular market. At the same time, platforms such as plick are growing, with a young user base making second hand the obvious first step when it comes to their style and their finances.

“Where young people are concerned, there’s no longer any stigma attached to purchasing second-hand items. And sometimes having a second-hand garment rather than a new one gives them even higher status,” says Jimmy Heibert, CEO of plick.

**Plick was founded** in 2013 and is now one of Sweden’s biggest social second-hand marketplaces among the young. The company, led by CEO and co-founder Jimmy Heibert, focuses sharply on tech, sustainable consumption and community.

Being an app-first company, plick is fully mobile-friendly and designed to fit into young people’s daily lives. Users buy and sell clothing on the app – sometimes to revamp their wardrobe, and sometimes as their first side hustle.

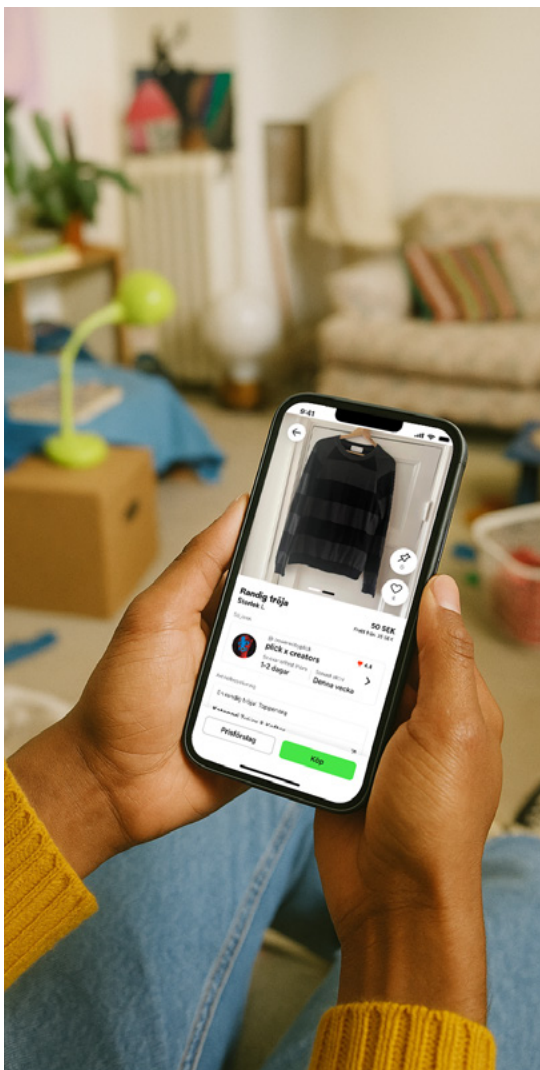
“For many of our users, this is the first job they have,” says Jimmy Heibert. “Just as young people used to work a few hours now and then at the supermarket, they may now choose to buy and sell second hand.”

The most business-minded build up their own stock at home and sell items for hundreds of thousands of Swedish kronor, while others mostly want to finance their next purchase.

“The typical user is one who buys something and wants to get as much money back as possible so they can







## “For many of our users, this is the first job they have. Just as young people used to work a few hours now and then at the supermarket, they may now choose to buy and sell second hand.”

buy something new,” says Jimmy Heibert.

There has been a huge change in the maturity of young men when it comes to making sustainable purchases, with men's share of such purchases rising from 15 percent to 40 percent in the space of three years. Jimmy also sees a clear pattern in how young men shop,

“Quite a lot of them have an individual style they want to show off, so they have to be able to convert this to be able to afford it.”

Plick is constructed to be something bigger than just a transaction. The social dimension is key, with many people spending time on the app without necessarily buying or selling anything. For users, it's not just about finding garments – it's about finding themselves. By following friends, gaining inspiration from others and discovering what is currently trending, the app becomes a place to both explore style and create an identity.

“We've always seen ourselves as a social platform for young people

– fashion just happens to be the biggest category right now,” says Jimmy Heibert. “We try to value not just purchases, but also the time spent creating your style amid an abundance of second-hand clothing. It's both a challenge and an opportunity.”

**To keep** users engaged, plick invests heavily in activating its community in the app itself – through competitions, gamification and campaigns with free shipping. Instead of focusing on traditional performance marketing in broad channels such as Meta and Google, a sizeable portion of the marketing budget goes to initiatives that boost loyalty where users are already active.

Over the past year, plick has also modified its external marketing strategy – for cost reasons and to make a greater impact.

“We do not spend as we did before,” says Jimmy Heibert. “The macroeconomic situation requires us to focus more sharply on profitability, resulting in us scaling down the number of channels we work with. Today we

focus mainly on TikTok and to some extent Snapchat – very little on other platforms.”

Rather than measuring each individual activity in isolation, the company tries to maximize overall value – especially in collaborations and content production.

“When we collaborate with an influencer today, we calculate what we get out of them in terms of content, what we can reuse in our own channels, what works organically – and only then do we look at performance,” says Jimmy Heibert. “This makes more of an impact at a more reasonable cost.”

When the US recently imposed increased tariffs on items from countries without free trade agreements, this raised the question: what happens to fast fashion when the price of manufacturing new items rises – especially from major manufacturing countries like China and Bangladesh?

“Many of these items will be subject to very high tariffs,” says Jimmy Heibert. “This will allow second hand to gain ground. It may become even more relevant. If there's a full-blown trade war, the winner could well be C2C, at least where clothing is concerned. We have a very strong offering in that segment.”

**With the** cost burden on newly manufactured items increasing, Jimmy envisions that more e-retailers may

## About plick

Plick is a social buying and selling platform for second-hand items focusing on young people aged 13–25. Users mainly buy and sell clothing, but also accessories, shoes and electronics. The platform currently has over 1.5 million registered users, around a quarter of whom are active every month. An average garment on the platform sells for around SEK 450.

Plick's revenue model is made up of several components: transaction fees, shipping, microtransactions (such as extra visibility in the app), an advertising component offering display advertising and native partnerships, and buyer protection.

The company has also run a separate B2C business in used electronics since February 2024. Sales are made in that segment via professional resellers, which means that the fee is on the seller's side rather than the buyer's.

The platform's checkout offers Swish mobile payment, card payment, selectable shipping options and supplementary insurance in partnership with the Norwegian company Tillit, which gives the buyer a 14-day inspection period instead of the usual 24 hours.

The company's origin and primary focus is on Sweden, but it is also active in Finland.



start the shift towards second hand – not as a sideline, but as a strategic segment in their range.

“I think e-retailers should get involved,” he says. “It’s good for us too. Consumers vary – some will want the security of purchasing from an established market participant, which requires a serious offering.”

At the same time, he warns that second hand should not be reduced to a PR exercise.

“There’s a huge amount to be gained if you view it as a business and not as a means of ‘greening’ the rest of your operation.”

However, where many of the major e-commerce market participants are concerned, their second-hand business is still marginal. In the latest E-barometern survey, only three per cent of consumers said they had purchased second-hand items straight from an online store.

“This can be graded as a fail,” says Jimmy Heibert. “Those e-retailers who engage wholeheartedly have a great deal to gain. It leads to better margins, more loyal users and a more relevant offering.”

He highlights Polarn O. Pyret as an example of a company that has taken

**“We know the weight of the parcel on dispatch and receipt. If someone tries to send air in an envelope, or change the contents, we can see that immediately.”**

second hand seriously, thus opening up to new customer groups.

“Suddenly you become relevant to a larger audience than before,” says Jimmy Heibert. “That’s where I think we should be heading – towards no longer making a distinction between new and second hand.”

Plick’s majority shareholder has been Schibsted for several years now. However, in the fall of 2024, the ownership structure changed when the media group divided its operations into two companies: one for media and one for marketplaces, the latter under the new name of Vend. The restructuring process involved Schibsted reducing its ownership in Plick to below 51 percent, thus becoming a minority shareholder.

“We’re still clearly a part of their core business, but we’re a start-up and that doesn’t always fit into the logic of the stock exchange,” says Jimmy. “So, we made the joint decision that they should step down from majority ownership. It gives us greater room for maneuver, while Schibsted remains an important strategic partner.”

**In connection with the** change of ownership, Plick also took over two existing used electronics marketplaces, Blocket Nybegagnat in Sweden and its Norwegian counterpart, both originating from Schibsted.

“They’ve done a fantastic job of building them up,” says Jimmy Heibert. “We now have the opportunity to develop the business further in our own environment, enabling us to take slightly bigger risks and make rapid progress.”

The new B2C venture differs from Plick’s usual C2C model but serves as a natural complement to existing offerings – especially for a young target audience.

“These are parents who buy used electronics for their children,” he says. “So, this offering is perfect for them. It’s safe, provides a warranty and comes from professional market participants. It’s a vastly different offering from our usual one – this one is about trust and safety. But it boosts our overall offering for young people, making us relevant in more parts of their daily lives.”

A key part of the purchase experience is the checkout – and here, Plick is working constantly to improve flow, security and price logic.

“The checkout is one of our most dynamic components,” says Jimmy. “We can add or remove features the same day and are constantly A/B testing everything from display order to insurance and shipping.”

When Swish was added as a payment method, they immediately saw more people completing their purchases. For Plick’s young target audience, simplicity is essential.

Another new feature is supplementary insurance in partnership with Norwegian insurance firm Tillit, which extends the inspection period from 24 hours to 14 days.

“You may not get the chance to try out a pair of shoes in one day, but in two weeks you’ll realize if they aren’t for you,” says Jimmy Heibert.

## Plick’s top three

- Trousers
- Tops, such as cardigans and jumpers
- Footwear

*Top categories based on sales.*





The price of shipping is also more personalized than the user sees.

“We work with a fairly complex model where the price is based on several factors – not just size, but also category, average order value and, in some cases, what we think the buyer is willing to pay,” says Jimmy.

At the same time, the sustainability aspect has been integrated in the checkout – through Nordic Swan Ecolabel shipping options launched in partnership with PostNord, for example.

“We’re trying to make people more aware that how you decide to have your parcel delivered also matters,” he says.

Another key issue for C2C platforms like pick is security. Although fraud is a rare occurrence, constant attention to this issue is required.

“This is nothing new,” says Jimmy. “Professional fraudsters have always existed, and we’re making constant efforts to identify patterns and stop them in time.”

**A crucial security factor** is that pick books the shipping itself.

“We know the weight of the parcel on dispatch and receipt,” says Jimmy. “If someone tries to send air in an envelope or change the contents, we can see that immediately.”

AI and internal risk systems help flag behavior diverging from the

norm – but threats don’t just come from within.

“There are attacks from abroad, attempts to mimic our checkout or redirect users to other environments,” he says. “We work on tracking and blocking such traffic on a daily basis.”

And talking of AI, while pick may look like a fashion platform externally, it is a tech company at heart – with AI forming an integral part of its day-to-day work.

“We’ve always been a tech company,” says Jimmy. “From the outside, it may seem like we’re a fashion company, but AI and technology are the common thread running through everything we do – from uploading to moderation, relevance and how products are displayed.”

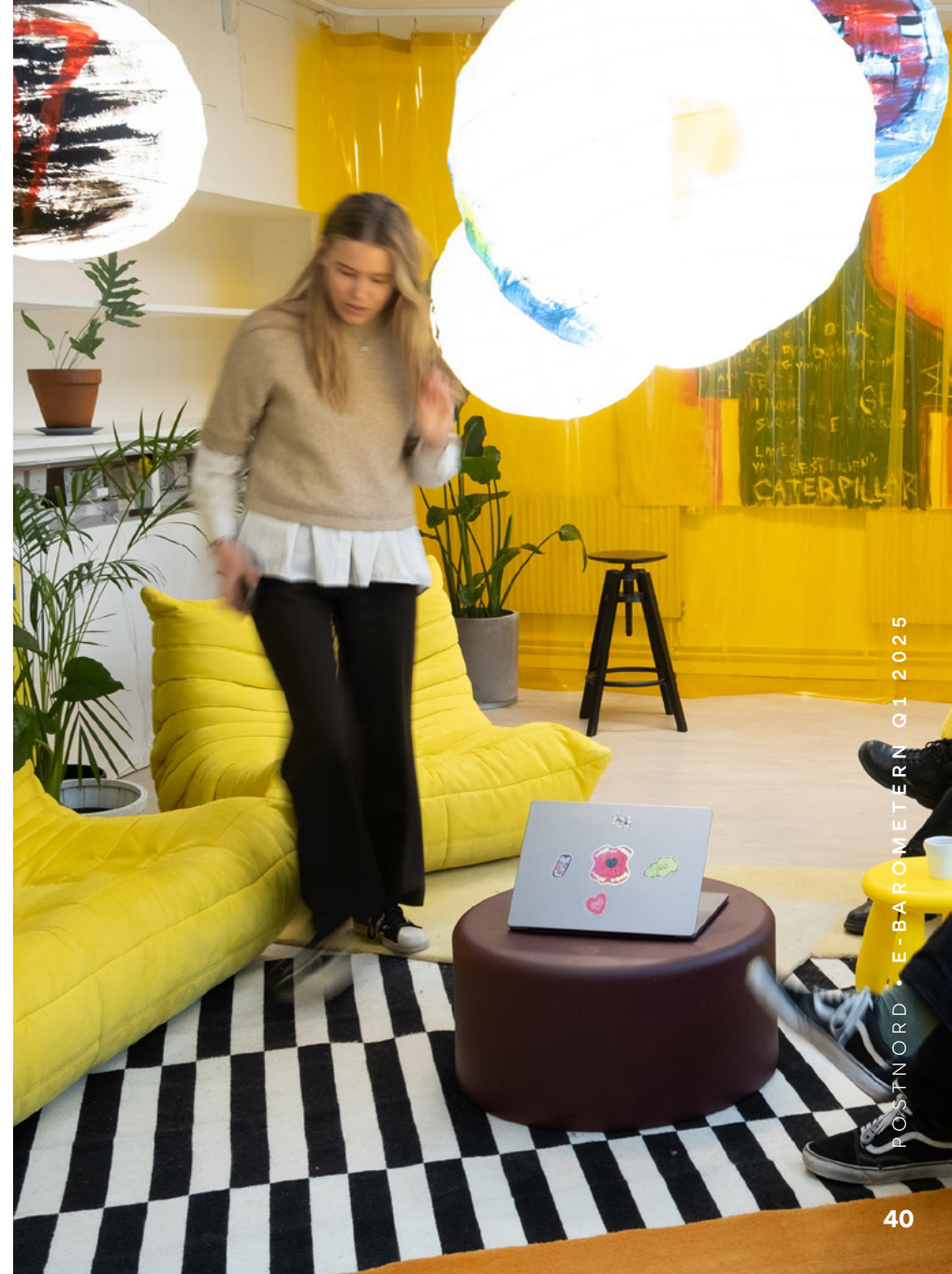
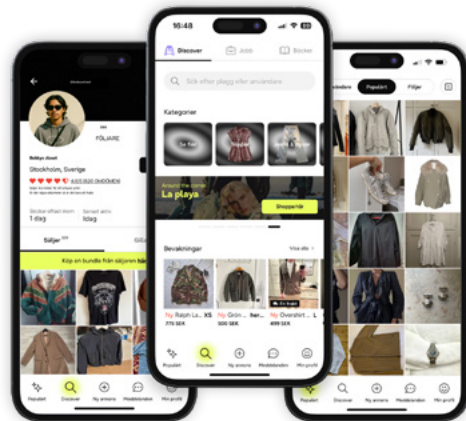
Where users are concerned, this is most noticeable in the upload flow. This is where pick has devoted the most attention in terms of external

functionality – and where the threshold for posting a garment has been significantly lowered.

“We let AI produce the description, suggest brands, categorize,” he says. “This lowers the threshold and encourages more people to post their items.”

At the same time, Jimmy thinks that traditional methods are often equally good or even better than AI in some cases.

“There’s massive over-confidence in inserting AI in all parts of the process,” says Jimmy. “Many of the best-performing elements are built using traditional algorithms; they’re often more efficient, particularly in terms of the energy they consume. It’s important to use technology where it really makes a difference,” he concludes.



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## postnord

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## hui.

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HUI Research AB provides, via its consultancy and research activities, professional decision-making material and advice to businesses and the public sector in the areas of retail, tourism, consumption and economics. The company was founded in 1968 and is an independent subsidiary of the trade association Svensk Handel (Swedish Commerce).

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