

Freedonia Focus Reports
Global Collection



Global Food E-Commerce

April 2019



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About This Report

Scope

This report forecasts to 2023 and 2028 global food e-commerce sales by major world region in nominal US dollars. World regions include:

- North America
- Europe
- Asia/Pacific
- Latin America
- Africa/Mideast

To illustrate historical trends, world and regional demand are provided for 2013 and 2018.

This report analyzes the global business-to-consumer (B2C) sale of food and beverage products. Sales include those made using devices that access the internet, such as:

- desktop computers
- laptops
- tablets
- smartphones
- point-of-sales transactions using contactless payment
- smart wearables

Sales made through retailer websites, physical stores (online in store), email, QR codes, catalogs, and smartphone apps are all included. Additionally, Value-Added Tax (VAT), sales tax, and delivery costs are included in sales figures.

Excluded from the data in this report are:

- consumer-to-consumer transactions (e.g., a private individual selling used items through an online marketplace)
- business-to-business transactions (e.g., a business paying a third-party delivery company)
- grocery purchases made via personal shoppers (as those sales are recorded as in-store purchases)
- non-food items sold by grocery retailers (e.g., cleaning or personal hygiene products)
- foods prepared by restaurants (e.g., pizza delivery companies)
- returned items

About This Report

For the purposes of this report, the terms “food e-commerce”, “online grocery”, and “e-grocery” are used synonymously.

Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Food E-Commerce (FW10063) is based on *Global Food E-Commerce* published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 4 | NAICS & SIC Codes Related to Food E-Commerce

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
454111	Electronic Shopping	5961	Catalog and Mail-Order Houses
454112	Electronic Auctions		

Source: US Census Bureau

Table 5 | NACE Codes Related to Food E-Commerce

NACE Code	Definition
47.91	Retail sale via mail order houses or via internet

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

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Freedonia Industry Studies

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Global E-Commerce
Global Pharmaceutical Packaging
Global Pressure Sensitive Tapes
Global Protective Packaging Market
Protective Packaging Market in the US
Retail E-Commerce Packaging Market in the US

Freedonia Focus Reports

Data Processing & Hosting: United States
E-Commerce: Canada
E-Commerce: United States
Food Retail: United States
Global Demographics
Global Macroeconomy
Travel Services: United States

Freedonia Custom Research

Packaged Facts

Amazon Strategies and the Amazon Shopper
Meal Kits: Trends and Opportunities in the U.S.
Online Grocery Shopping in the U.S.
U.S. Grocery Market Focus: The Amazon Food Shopper
U.S. Grocery Market Focus: The Walmart Food Shopper
U.S. Pet Market Focus: The Amazon Pet Food and Supplies Shopper
U.S. Pet Market Outlook, 2019-2020

Trade Publications

Canadian Grocer
E-Commerce Times
Ecommerce Magazine
Essential Retail
euromeatnews.com
Food Industry Asia

About This Report

Food Navigator

FoodDive

Grocery Dive

Internet Retailer

Practical Ecommerce

SeafoodSource

Supermarket News

Agencies & Associations

Agriculture and Agri-Food Canada

Ecommerce Foundation

European Commission

European eCommerce & Omni-Channel Trade Association

Eurostat

Global From Asia

International Monetary Fund

Internet Merchants Association

Organisation for Economic Co-operation and Development

United States Census Bureau

United States International Trade Commission

World Bank