

CA

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April 2025

casaleggio.it

e-commerce Italia

Ecommerce in Italy 2025

**CASALEGGIO
ASSOCIATI**
Digital Thinking

Ecommerce and Artificial Intelligence:
revolution in progress



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Digital Thinking

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We help companies to define their digital strategies and accompany them through the process of transformation, thanks to the solid experience we have gained since 2004.

Casaleggio Associati

We conceive and implement digital transformation projects

Business transformation has never been so quick and requires a medium to long-term strategy: we must set priorities, assess the feasibility, proceed with implementation and evaluate the return on investment. For these reasons, a solid strategy presupposes an overall vision in which business models, the digital ecosystem, advertising and digital relations with customers are jointly analysed as a unit.

Digital Thinking is the first value that we can pass on to our clients.

We design and build the digital future alongside them, proposing innovative solutions within their business processes and corporate business practices. We help our clients to communicate their transformation in novel terms and via new channels so as to better position them within a competitive global context.

We analyse market changes and changing needs, provide new insights and trends and compare them with international dynamics.

Our Services

Our in-depth analysis ability and many years of experience in numerous market sectors enable us to act as a solid, reliable partner for companies wanting to incorporate innovation into their business models.

Our areas of consulting and related services are:

→ Digital Strategy & Innovation

- Strategy Design
- Rethinking Business Model
- Artificial Intelligence Strategy
- Roadmap to Smart Company

→ Digital communication

- Brand Positioning & Reputation
- Digital Marketing Strategy
- Content Strategy
- Community accelerator

→ Research, Education & Digital Thinking

- Vertical studies and research
- Observatories on digital world
- Corporate trainings
- Speech

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Methodology

The 19th edition of the 'Ecommerce in Italy' report was realised through the elaboration of studies and market research, news articles and field experience by Casaleggio Associati, as well as through an online survey and in-depth interviews with 145 of the main market players. Participants included company owners, CEOs, general managers, marketing managers, country managers, Ecommerce managers and Internet managers.

The companies surveyed are Italian or Italian subsidiaries of multinational groups. All data presented refer to the Italian business-to-consumer market.

For this edition, the sector estimation method was supplemented and improved by a precise assessment of the turnover of thousands of merchants in the Italian

market. The 14,517 most significant Ecommerce sites in Italy were identified and of these for 8,437 sites the turnover was estimated individually through the analysis of available balance sheets or through the press releases of the company or of the sector associations or even through the strength ratios in terms of traffic with competitors. Most of the sites considered are listed on the following page:

www.ecommerceitalia.info/en/e-commerce-ranking-en/.

The sites were grouped by product sector and the aggregate turnover figure was multiplied by the representativeness of the identified cluster of sites with respect to the overall sector.

Goods and services sectors



FOOD AND BEVERAGE

Food, drinks, delivery, oil, coffee



PETS

Dogs, cats and pets food, products and accessories.



INSURANCE

Car, home and motorbike insurance, travel insurance.



CAR AND MOTORCYCLE

Vehicles, spare parts, vehicle products, clothing and accessories sale.



BABIES AND TOYS

Baby and premanan products, accessories and toys.



HOME AND FURNITURE

Furniture, household supplies, DIY, home decor, hardware.



PUBLISHING

Books, publishing contents on physical supports.



ELECTRONICS

Smartphones, TVs, PCs, appliances and other technological products.



PHARMACIES

Medicines



JEWELLERY AND WATCHES

Jewellery, watches, bracelets, earrings and precious necklaces



MARKETPLACE

Online shopping portals, supermarkets, online malls



FASHION

Clothing, footwear, jewellery, glasses, bags, accessories



HEALTH AND BEAUTY

Perfumes, cosmetics, medical products, treatments, supplements, glasses



GAMBLING

Online betting and gambling



SPORT

Sports clothing and equipment



LEISURE AND ENTERTAINMENT

Streaming, event tickets, music, video games, hobbies, collecting, gifts



TRAVEL AND TOURISM

Transport, hotels, tour operators, attractions

Casaleggio Associati Ecommerce Ranking

The ranking aims at assessing Ecommerce websites popularity in Italy. The calculus is based on the algorithm outlining the monthly Ecommerce Ranking, which analyses the following data:



Single Visitors: total number of single visitors on a monthly base in Italy (Casaleggio Associati evaluation on Semrush data)



Online popularity: brand relevance according to CA data and evaluation (non-visible data).



Average time: the average time spent on the analysed domain during each visit



Bounce rate: percentage of visitors leaving the website after viewing only one page.



Relevance: overall score calculated on the basis of previous data, through the algorithm we constantly improve.

The ranking has no statistical value but is indicative of the existing balance of power between the various players according to the parameters defined by Casaleggio Associati. Apps data are not currently taken into account.

Choice of the winning companies

In order to determine winners, the data related to Casaleggio Associati's "Ecommerce Ranking" on an annual basis was analysed and the appropriate corrections were made to avoid discrepancies and obtain a ranking that reflected the positions which emerged throughout 2022.

Fastest Growing Ranking

The ranking was created by aggregating three different factors: overall growth in terms of positions climbed, relative growth based on the value of climbed positions and the increase rate in single visitors year on year.

Follow the updated ranking on:

www.ecommerceitalia.info/e-commerce-ranking

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Introduction

The Opinion

The year 2024 marked a decisive turning point for Italian Ecommerce, consolidating the digital transformation of businesses and opening up new frontiers through the strategic integration of advanced technologies. With the total value of the online market reaching EUR 85.4 billion, up 6%, the sector has demonstrated an extraordinary capacity for resilience and innovation. Some segments faced tough challenges, while others, such as Betting & Casino, Auto & Moto and Insurance, seized expansion opportunities with excellent performances.

The adoption of Artificial Intelligence is radically redefining the online shopping experience, opening up unprecedented scenarios of personalisation, automation and advanced interaction. At the same time, App-commerce has established itself as a privileged channel, especially in the fashion industry, revolutionising the way in which customers are engaged and retained.

The rapidly evolving European regulatory environment, with the introduction of the Digital Services Act (DSA), the Digital Markets Act (DMA) and the DAC7, requires not only increased compliance, but also the opportunity for Italian Ecommerce companies to strengthen transparency and consumer trust. Recent tax investigations on giants such as Amazon further underline the need for a fairer and more responsible ecosystem.

Looking ahead, innovation continues to be the driving force: Marketplaces, Live Commerce and new interactive technologies are radically transforming business strategies, pushing Italian operators to anticipate change and create added value through authentic and engaging shopping experiences. The challenge and opportunity of the near future will lie in the ability of companies to adapt quickly, anticipate emerging needs and become active players in an increasingly dynamic and competitive market.

CHAPTER ONE

The State of Ecommerce

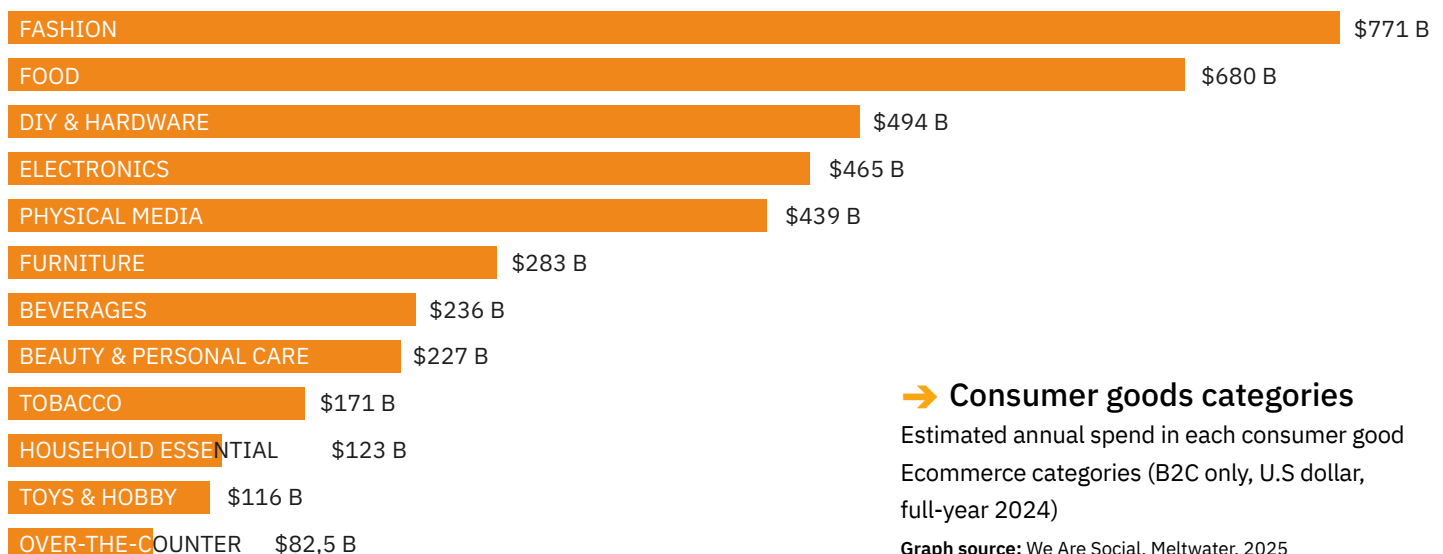
L'Ecommerce nel mondo

There are 5.56 billion users accessing the Internet worldwide (+3.9% in the last year), almost 68% of the world's total population. The majority of Internet users (96.3%, -0.2% YoY) use mobile devices to connect and globally the average time spent online decreased in 2024 by two minutes to 6h 38 min per day. Furthermore, for the third year in a row, the number of people shopping online every week worldwide decreased: -0.3% YoY, accounting for 55.8% of Internet users¹. In absolute terms, however, online shoppers grew to 2.54 billion people.

Mobile accounts for a large share, averaging 63.05% of global traffic, while 35.06% comes from desktop (down 12.5%) and 1.86% from tablet². In 2024 worldwide, mobile purchases (51.4%) surpassed desktop purchases (48.7%)³.

The global Ecommerce market in 2025 will reach \$4.32 trillion in sales, rising to an estimated \$5.89 trillion in 2029⁴.

Among the world's most purchased consumer goods online throughout 2024 are Fashion (\$771 billion), Food (\$680 billion), DIY (\$494 billion), and Consumer Electronics (\$465 billion).



1: Digital 2025, We Are Social, Meltwater, 2025; 2: Desktop vs Mobile vs Tablet Market Share Worldwide, Statcounter, 2025; 3: Statista, 2025; 4: Statista, 2025

Ecommerce via apps continues to grow and among the most used apps worldwide for online shopping is Amazon, followed by Shopee (SEA) and then Flipkart (Walmart). Also in the top ten are the Chinese Temu (4th), Shein (5th) and Aliexpress (7th)⁵.

	SHOPPING APPS	COMPANY
1	Amazon	Amazon
2	Shopee	SEA
3	Flipkart	Flipkart
4	Temu	PDD Holdings
5	Shein	Shein
6	Meesho	Meesho
7	AliExpress	Alibaba Group
8	Mercadolibre	Mercadolibre
9	Lazada	Alibaba Group
10	Myntra	Walmart

As far as payment methods are concerned, digital wallets are among the most widely used (50%), followed by credit and debit cards (34%). Credit transfers and buy now pay later remain with marginal percentages of 7% and 5% respectively⁶.

Compared to total retail sales in 2024, online sales weigh in at 20.1 per cent (vs. 20.8 per cent in 2023), and online penetration is estimated at up to 22 per cent in 2027⁷ (down by more than two points from last year’s forecast). Looking at individual sectors in the United States, for example, it can be seen, however, that more and more sales areas where online has become the majority. For example, among physical goods, video games surpassed the 50 per cent threshold of online sales in 2012, books in 2017, consumer electronics and furniture in 2020. The next expected sector is fashion in 2028.

➔ Most used mobile shopping apps

Ranking of mobile shopping apps, based on global monthly active users between 01 september 2024 and 30 november 2024

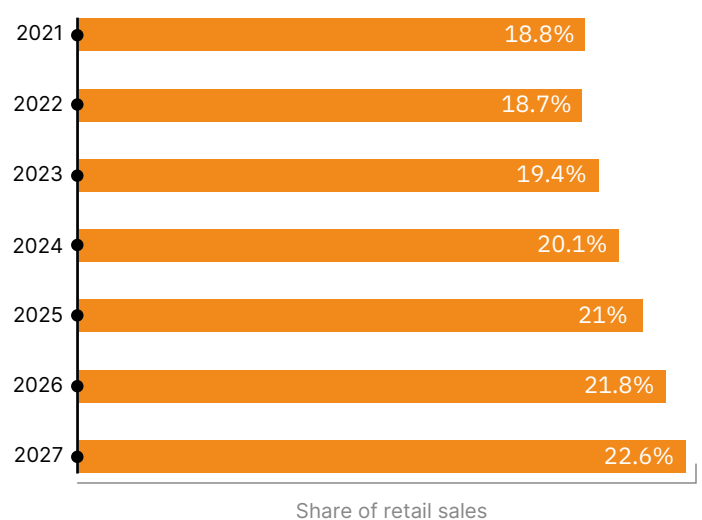
Graph source: We Are Social, Meltwater, 2025

	SHOPPING APPS	COMPANY
11	Ebay	Ebay
12	Wildberries	Wildberries
13	Shopsy	Walmart
14	Ozon	Ozon
15	Tokopedia	Goto Group
16	Lidl Plus	Schwarz Gruppe
17	Walmart	Walmart
18	Avito	Kismet Capital Group
19	Ajio Shopping App	Reliance Industries
20	AliExpress	Alibaba Group

➔ Ecommerce as percentage of total retail sales worldwide

From 2021 to 2027

Graph source: Statista, 2025

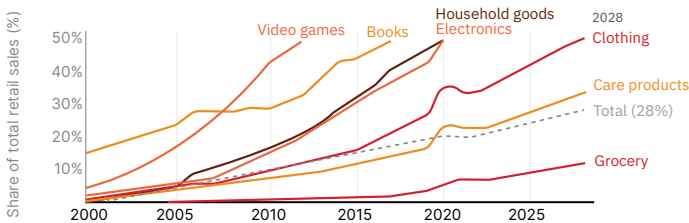


5: We Are Social, Meltwater, 2024; 6: Worldpay, 2024; 7: Statista, 2023.

➔ Ecommerce is becoming the most common sales channel in more and more categories

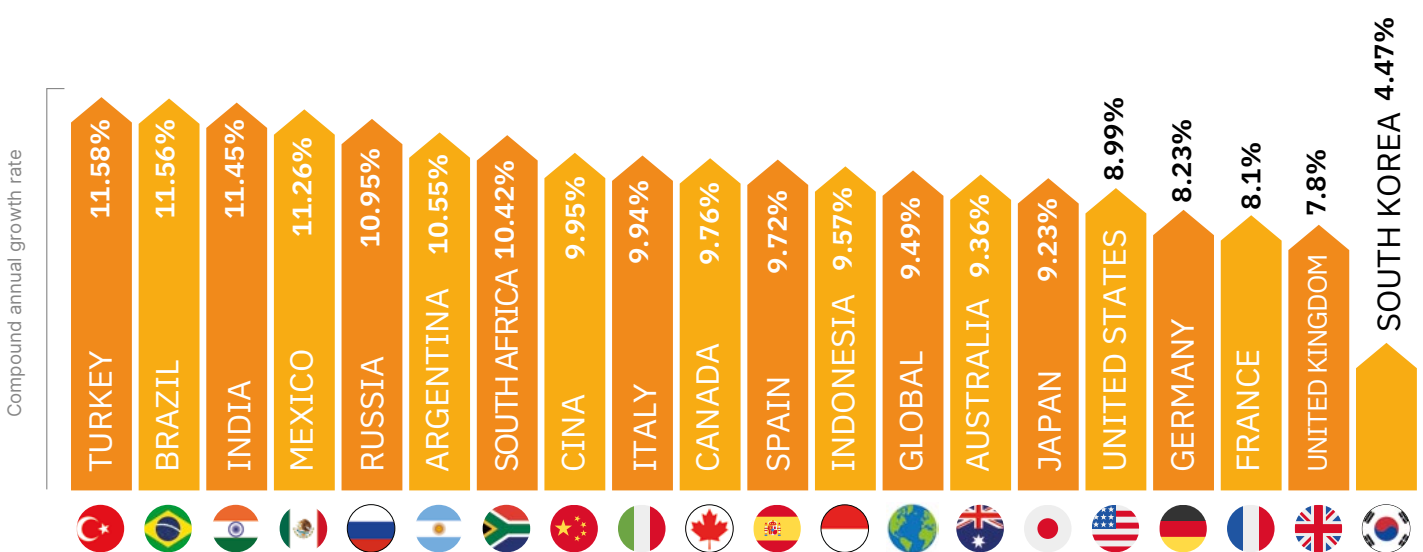
Timeline of US Ecommerce share of sales reaching 50%, by category.

Graph source: Forrester US Online Retail Forecast, August 2024



Comparing the various continents, it is Asia that leads the ranking of the world's largest Ecommerce markets, with total online retail revenues in Asian countries reaching almost USD 2 trillion in 2024, about USD 500 million more than the Ecommerce revenues achieved in the Americas. Australia, Oceania and Africa achieved much lower Ecommerce revenues in 2024, with values of less than USD 50 billion. Asia's leading position can mainly be attributed to China, which achieved a turnover of more than USD 1.4 billion in 2024.

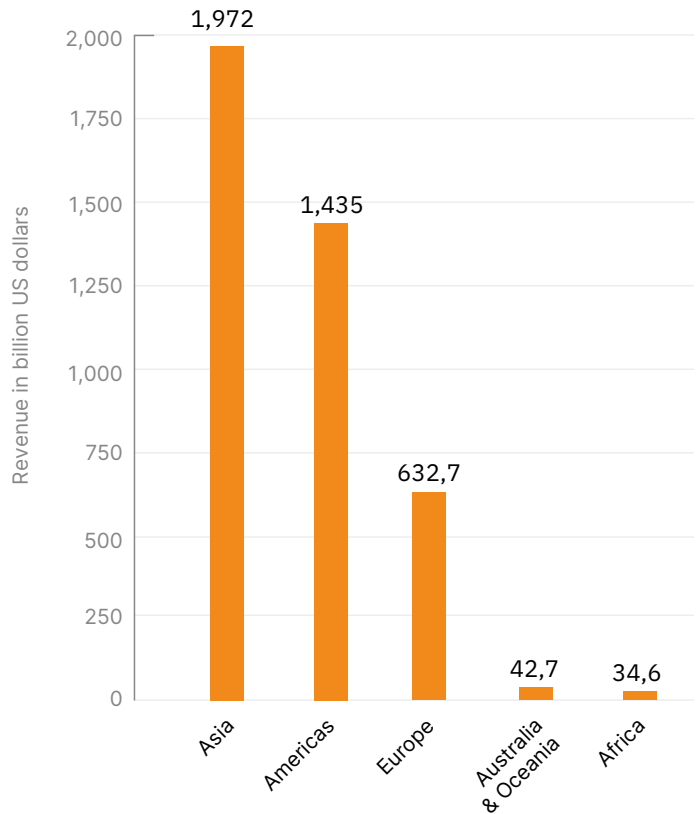
The growth estimates for the next four years see Turkey (CAGR +11.58%), Brazil (11.56%), India (11.45%), Mexico (11.26%) and Russia (10.95%) as the main players. China, on the other hand, is expected to grow at a CAGR of 9.95%, which is more in line with the global rate of 9.49%⁸.



8: Key Figures of E-commerce, Statista, 2024

➔ Total retail Ecommerce revenue worldwide in 2024, by region

Graph source: Statista Digital Market Insights, 2024



➔ Retail Ecommerce sales compound annual growth rate (CAGR) from 2024 to 2029, by country

Graph source: Statista Digital Market Insights, 2024

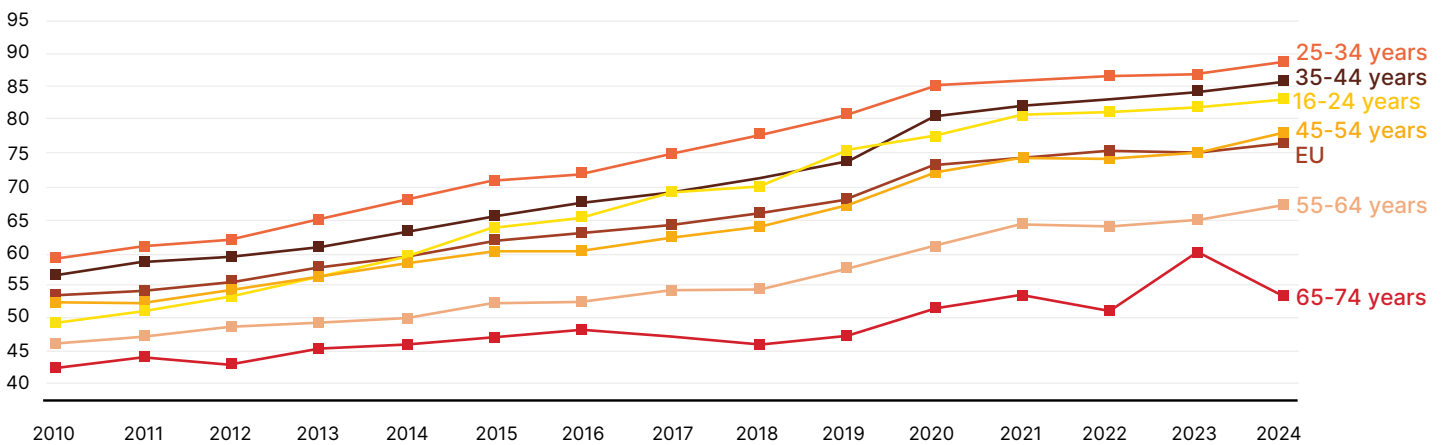
Ecommerce in Europe

In Europe, internet penetration in 2024 has arrived at 94% (percentage of the total population that has internet access between the ages of 16 and 74). On the other hand, the percentage of internet users who buy online has decreased slightly to 77% in 2024 (vs. 78% in 2023)⁹, the main reason being the over-65 segment, which has fallen from 60% to 53% in one year.

→ Internet users who bought or ordered goods or services for private use in the previous 12 months by age group

EU, 2010-2024

Graph source: Eurostat, 2025



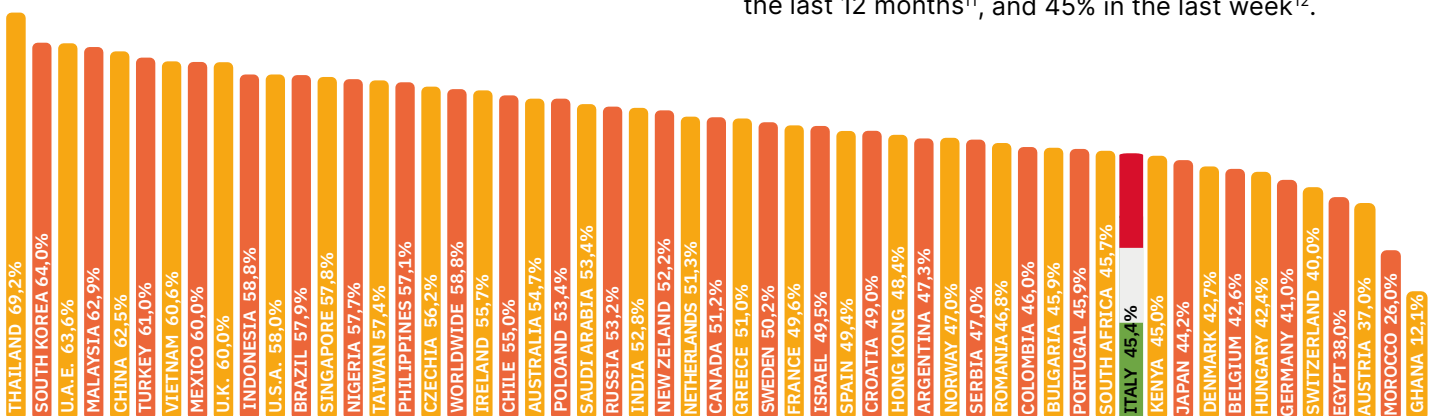
The value of B2C Ecommerce sales in Europe in 2024 was 640 billion and is expected to reach 700 billion by 2025 with a growth rate for the coming years of 9% (CAGR)¹⁰. The main Ecommerce players in Europe are Amazon, Allegro, AliExpress and Zalando.

→ Weekly online purchases

Percentage of internet users aged 16+ who buy something online each week

Graph source: We Are Social, Meltwater, 2025

Among the countries with the highest percentage of online shoppers are the Nordic countries such as Ireland (96%), the Netherlands (94%), Sweden (92%), Denmark (91%) and Norway (90%). Italy still has a significant gap with only 60% of its citizens having made a purchase in the last 12 months¹¹, and 45% in the last week¹².



9: European Ecommerce Report. Ecommerce Europe, 2023; 10: MordorIntelligence, 2024; 11: Ecommerce Statistics for individuals, Eurostat, 2025; 12: GWI, 2025.

CHAPTER TWO

Ecommerce in Italy

In Italy, the most recent recorded number of Internet users was 53.3 million at the beginning of 2025, with a penetration of 89.9%. This figure is up from that recorded in January 2024, with an increase of 2.2 per cent, 42.2 million Italians are also active on social media¹³.

The number of mobile connections in 2024 was 82.2 million (which is also higher than the total number of the population, with a penetration of 139%), up from the previous year by 0.3%. The percentage of Internet users accessing via mobile at the beginning of 2025 reached 89.9%¹⁴.

At the end of 2024, there were 44.4 million unique users in Italy, representing 76.1% of the population over 2 years old (+1.4% over the previous year) with an increase in time spent online of +8.9%.

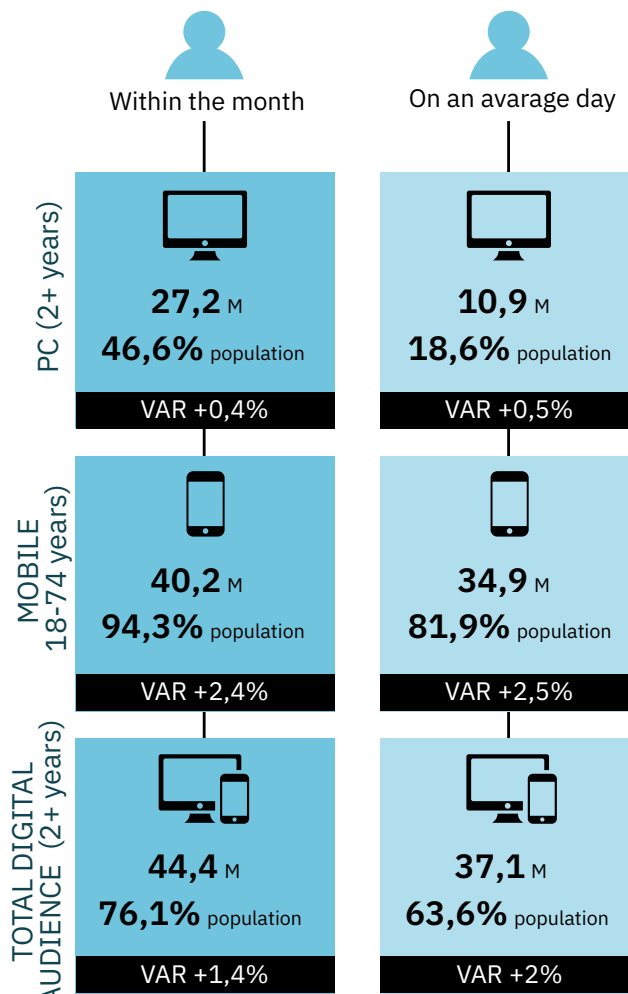
The driving medium is mobile (Smartphone and/or Tablet), which saw a 2.5 per cent increase in the user base in habitual and daily use, reaching 34.9 million individuals of age¹⁵.

Geographically, the North West is the most connected area with 67.3% of Italian adults surfing online; at the tail end are the South and the Islands with 59.6%¹⁶.

Taking the major players in the industry and their unique active users on sites and apps as a reference, the number is even higher, reaching over 44 million during 2024¹⁷.

→ Total digital audience in 2024

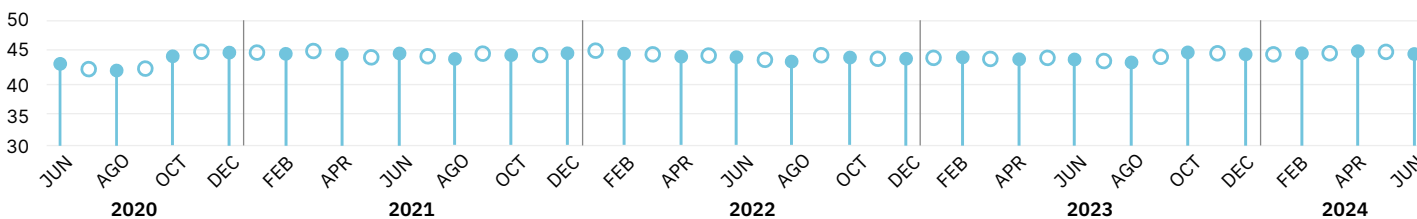
Graph source: Audiweb, 2025



→ Unique users of the sites/apps of major operators

Millions of monthly unique users (June 2020 - June 2024)

Graph source: AGCOM, 2024



13: Digital 2025: Italy, Datareportal, 2025; 14: Digital 2024: Italy, Datareportal, 2024; 15: Audiweb, 2025; 16: Total Digital Audience of December 2023, Audiweb 2023; 17: Communications Observatory, Agcom, 2024.

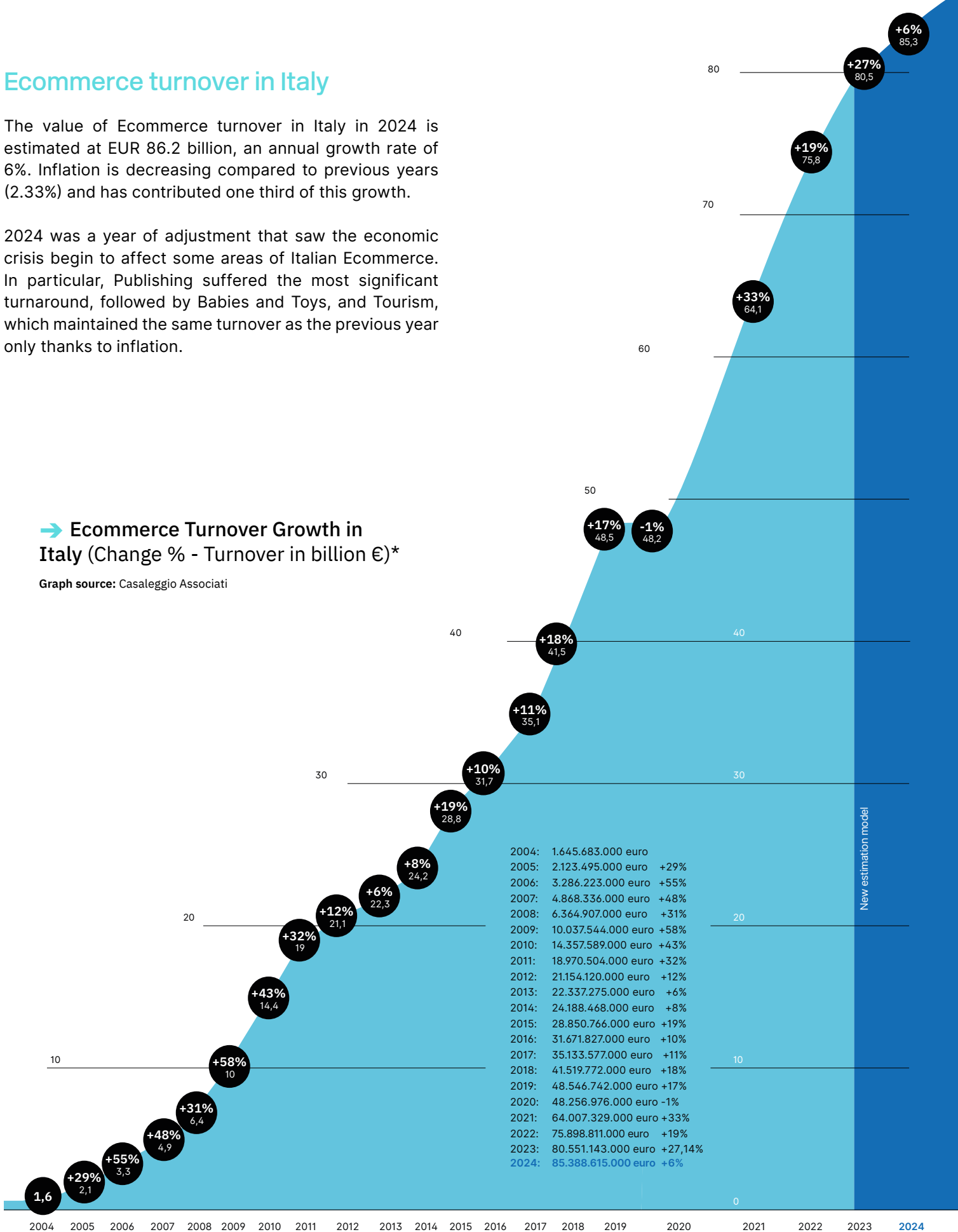
Ecommerce turnover in Italy

The value of Ecommerce turnover in Italy in 2024 is estimated at EUR 86.2 billion, an annual growth rate of 6%. Inflation is decreasing compared to previous years (2.33%) and has contributed one third of this growth.

2024 was a year of adjustment that saw the economic crisis begin to affect some areas of Italian Ecommerce. In particular, Publishing suffered the most significant turnaround, followed by Babies and Toys, and Tourism, which maintained the same turnover as the previous year only thanks to inflation.

→ Ecommerce Turnover Growth in Italy (Change % - Turnover in billion €)*

Graph source: Casaleggio Associati



→ Distribution of Ecommerce turnover in Italy

Graph source: Casaleggio Associati

Turnover distribution

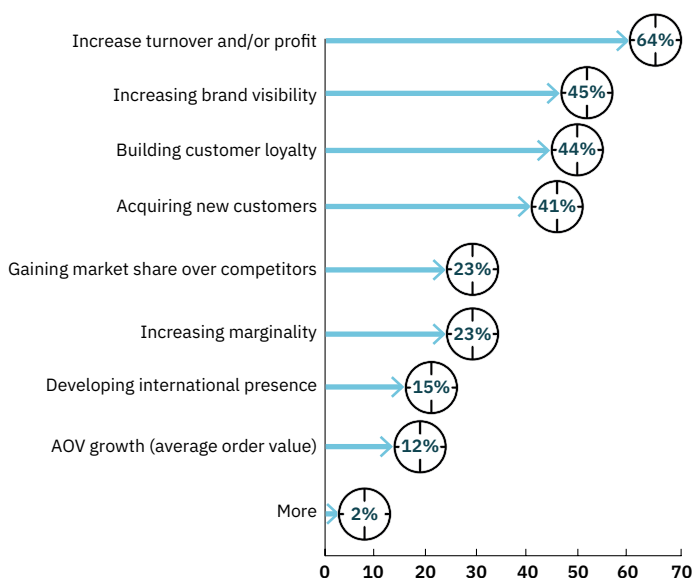
On average, an Italian Ecommerce site last year grew (+6%) below operators' expectations at the beginning of the year in terms of turnover. The sectors that suffered the biggest setback were those that grew the most in the previous year, such as Marketplace (+1% vs. +55% in 2023) followed by Travel and Tourism (0% vs +42% in 2023), and Pets (+7% vs +37%). The biggest setback is the Publishing sector (-14%). However, there are sectors that continue to drive growth such as Betting and Casinos (+31%), Cars and Motorcycles (+25%), Insurance (+17%) and Fashion (+16%).


Among the main objectives of the digital strategy, which the surveyed companies set themselves for 2025, are: for 64% to increase profit/turnover, in line with last year (65%), for 41% to acquire new customers, for 44% to build customer loyalty (up from 40% last year), for 45% to increase awareness (up sharply from last year where it was 34%), for 23% to increase margins, for 23% to gain market share over competitors, for 12% to grow the average order while 2% have other objectives.


→ Digital strategy 2025


What are the main goals of your digital strategy for 2025?

Graph source: Casaleggio Associati



 TRAVEL AND TOURISM
21.869.408.000

 MARKETPLACE
14.809.285.000


 LEISURE AND ENTERTAINMENT
13.444.221.000


 FASHION
6.030.757.000

 GAMBLING
5.090.002.000

 FOOD AND BEVERAGE
4.742.991.000


 ELECTRONICS
3.661.547.000

 HOME AND FURNITURE
3.371.328.000

 CARS AND MOTORCYCLES
2.508.380.000

 SPORT
2.478.617.000


 INSURANCE
2.391.668.000

 HEALTH AND BEAUTY
1.672.635.000

 PUBLISHING
1.275.842.000

 PHARMACIES
1.093.827.000

 JEWELLERY AND WATCHES
466.121.000

 PETS
259.231.000

 BABIES AND TOYS
222.746.000

Top Ecommerce in Italy

The Ecommerce Italia Awards 2025, organised by Casaleggio Associati, represent a significant benchmark for the Ecommerce sector in Italy, rewarding the most popular online sales sites based on the monthly Ecommerce Ranking. The second edition of these awards saw giants such as Amazon, Subito and eBay at the top, demonstrating their dominance in the Italian market.































The analysis conducted by Casaleggio Associati examined 14,517 companies operating in e-commerce in Italy, distributed across 17 different product sectors. This study identified the leading companies in five different categories, offering a detailed overview of the Italian Ecommerce ecosystem and the results achieved.

Analysing the top 14,000 Italian Ecommerce companies, it can be seen that the Top 10 of each sector are increasingly companies that offer marketplace services or have very extensive product ranges. The other characteristic that resonates at the top of the rankings is internationality, which unfortunately for the Italian economy often also means a foreign registered office. This is the case, for example, in historical flagship sectors such as Tourism, Food, Furniture or Health and Beauty.



Top 10 Fastest Growing 2025

The ten Ecommerce companies with the most significant growth in the past 12 months, according to Casaleggio Associati's weighted ranking.

Companies	Position	Industry	Nation	Valuation
1. Dr Max 	71	 Pharmacies		★ ★ ★ ★ ★
2. Steam 	29	 Leisure		★ ★ ★ ★ ★
3. Foot Locker 	95	 Sport		★ ★ ★ ★ ★
4. Goldbet 	72	 Gambling		★ ★ ★ ★ ★
5. Deghi 	57	 Home and Furniture		★ ★ ★ ★ ★
6. Douglas 	75	 Health and Beauty		★ ★ ★ ★ ★
7. Redcare 	52	 Pharmacies		★ ★ ★ ★ ★
8. 888 Casinò 	22	 Gambling		★ ★ ★ ★ ★
9. Prima 	39	 Insurance		★ ★ ★ ★ ★
10. Sephora 	73	 Health and Beauty		★ ★ ★ ★ ★



Top 100 ECOMMERCE ITALY 2025

The hundred brands that are driving the evolution of Ecommerce in Italy. The selection of the most popular online sales companies, determined by their performance over the past 12 months according to the Ecommerce Ranking algorithm, and representing the cutting edge of user experience and digital innovation.

1 amazon Amazon Marketplace ★★★★★	2 subito Subito Marketplace ★★★★★	3 ebay eBay Marketplace ★★★★★	4 Booking.com Booking.com Tourism ★★★★★	5 Apple Store Apple Store Electronics ★★★★★	6 LEROY MERLIN Leroy Merlin Home and Furniture ★★★★★	7 TRENITALIA Trenitalia Tourism ★★★★★	8 TEMU Temu Marketplace ★★★★★	9 RYANAIR Ryanair Tourism ★★★★★	10 IKEA Ikea Home and Furniture ★★★★★
11 MediaWorld Mediaworld Electronics ★★★★★	12 ticketone TicketOne Leisure ★★★★★	13 unieuro UniEuro Electronics ★★★★★	14 AliExpress Aliexpress Marketplace ★★★★★	15 DECATHLON Decathlon Sport ★★★★★	16 zalando Zalando Fashion ★★★★★	17 Sisal Sisal Gambling ★★★★★	18 Etsy Etsy Marketplace ★★★★★	19 airbnb Airbnb Tourism ★★★★★	20 SAMSUNG Samsung Electronics ★★★★★
21 Microsoft Microsoft Electronics ★★★★★	22 888 casino 888 Casinò Gambling ★★★★★	23 ManoMano ManoMano Marketplace ★★★★★	24 LaFeltrinelli IBS.it LaFeltrinelli IBS.it Publishing ★★★★★	25 TECNOMAT Tecnomat Home and Furniture ★★★★★	26 LaFeltrinelli Feltrinelli Publishing ★★★★★	27 trainline The Trainline Tourism ★★★★★	28 NIKE Nike Sport ★★★★★	29 STEAM Steam Leisure ★★★★★	30 xiaomi Xiaomi Electronics ★★★★★
31 AUTOdoc Auto-doc Car & Motorcycle ★★★★★	32 euronics Euronics Electronics ★★★★★	33 Vinted Vinted Fashion ★★★★★	34 eDreams eDreams Tourism ★★★★★	35 VIVATICKET Vivaticket Leisure ★★★★★	36 FLIXBUS Flixbus Tourism ★★★★★	37 hp HP Electronics ★★★★★	38 UCI Cinemas UCI Cinemas Leisure ★★★★★	39 prima Prima Insurance ★★★★★	40 Mondo Convenienza Mondo Convenienza Home and Furniture ★★★★★
41 easyJet Easyjet Tourism ★★★★★	42 NOTINO Notino Health and Beauty ★★★★★	43 The Space Cinema The Space Cinema Leisure ★★★★★	44 ZARA Zara Fashion ★★★★★	45 italo Italo Tourism ★★★★★	46 ITA AIRWAYS ITA Airways Tourism ★★★★★	47 WIZZ Wizz Air Tourism ★★★★★	48 JUST EAT Just Eat Food and Beverage ★★★★★	49 GET YOUR GUIDE Get Your Guide Tourism ★★★★★	50 Marketplace Facebook Marketplace Marketplace ★★★★★
51 Expedia Expedia Tourism ★★★★★	52 Redcare Redcare Pharmacies ★★★★★	53 adidas Adidas Sport ★★★★★	54 UnipolSai Unipol Sai Insurance ★★★★★	55 atida eFarma Atida eFarma Pharmacies ★★★★★	56 SNAI Snai Gambling ★★★★★	57 DEGHI Deghi Home and Furniture ★★★★★	58 MONDADORI Mondadori Store Publishing ★★★★★	59 SHEIN Shein Fashion ★★★★★	60 H&M H&M Fashion ★★★★★
61 zooplus Zooplus Pets ★★★★★	62 deliveroo Deliveroo Food and Beverage ★★★★★	63 cisalfa Cisalfa Sport Sport ★★★★★	64 LIBRACCIO Libraccio Publishing ★★★★★	65 lastminute.com Lastminute.com Tourism ★★★★★	66 INSTANT GAMING Instant Gaming Leisure ★★★★★	67 LOTTOMATICA Lottomatica Gambling ★★★★★	68 ePRICE ePrice Marketplace ★★★★★	69 LG LG Electronics ★★★★★	70 GROUPON Groupon Marketplace ★★★★★
71 Dr.Max Dr Max Pharmacies ★★★★★	72 GoldBet Goldbet Gambling ★★★★★	73 SEPHORA Sephora Health and Beauty ★★★★★	74 bet365 Bet365 Gambling ★★★★★	75 DOUGLAS Douglas Health and Beauty ★★★★★	76 LEGO Lego Babies and Toys ★★★★★	77 OSOS ASOS Fashion ★★★★★	78 EUROBET Eurobet Gambling ★★★★★	79 GameStop Game Stop Leisure ★★★★★	80 FARMACIA LORETO Farmacia Loreto Pharmacies ★★★★★
81 FARMASAVE Farmasave Pharmacies ★★★★★	82 GARMIN Garmin Electronics ★★★★★	83 MAISONS DU MONDE Maisons du Monde Home and Furniture ★★★★★	84 StrumentiMusicali.net Strumentimusicali.net Leisure ★★★★★	85 OVS OVS Fashion ★★★★★	86 ARCAPLANET Arcaplanet Pets ★★★★★	87 OBI Obi Home and Furniture ★★★★★	88 ticketmaster Ticketmaster Leisure ★★★★★	89 th.mann Thomann Leisure ★★★★★	90 conTe.it ConTe.it Insurance ★★★★★
91 PANDORA Pandora Jewelry and Watches ★★★★★	92 volagratis Volagratis Tourism ★★★★★	93 TRENORD Trenord Tourism ★★★★★	94 HUAWEI Huawei Electronics ★★★★★	95 Foot Locker Foot Locker Sport ★★★★★	96 KASANOVA Kasanova Home and Furniture ★★★★★	97 catawiki Catawiki Marketplace ★★★★★	98 Costa Costa Crociere Tourism ★★★★★	99 macrolibrarsi Macrolibrarsi Marketplace ★★★★★	100 PlayStation Store PlayStation Store Leisure ★★★★★



Top 10 Industry Leaders 2025

The ten most popular companies for each of the 17 product sectors

FOOD AND BEVERAGE



ESTIMATE TURNOVER 2024:
€ 4.742.991.000

GROWTH (24-23):
13%

OF WHICH INFLATION (24-23):
3,2%

GROWTH (24-23)
PER ITEMS SOLD
(WITHOUT INFLATION)
10%

1	2	3	4	5	6	7	8	9	10
Just Eat	Deliveroo	Glovo	Vivino	Nespresso	Tannico	Callmewine	Bernabei	Lavazza	Eataly
★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★

The **Food and Beverage** sector exceeded 4.7 billion in revenue in 2024 and is continuously growing (13%). A quarter of the growth (3.2%) is due to price increases. The market is dominated by Italian players (95%), who are, however, on par with the top 10 players in the sector. The most represented region among Italian players in the sector is Lombardy, while among foreign players, it is Spain.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

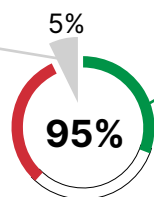


ITALIANITY TOP 10



ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)
Spain
United States
France



Main Regions (per number of companies)
Lombardy
Campania
Emilia-Romagna

PETS



ESTIMATE TURNOVER 2024:
€259.231.000

GROWTH (24-23):
7%

OF WHICH INFLATION (24-23):
0,3%

GROWTH (24-23)
PER ITEMS SOLD
(WITHOUT INFLATION)
7%

1	2	3	4	5	6	7	8	9	10
Zooplus	Arcaplanet	Bauzaar	Isola dei Tesori	Quattrozampe Shop	Robinsonpetshop	Il Verde Mondo	FarmaPets	Bitiba	Paco Pet Shop
★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★

The **Pets** sector had a modest growth last year (7%) with an almost non-existent inflation of 0.3%, reaching a turnover of 259 million euros. Italian actors in the sector represent 92% with a good presence (80%) also among the top 10. The most represented region among the sector's actors is Campania.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

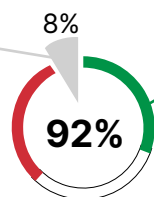


ITALIANITY TOP 10




ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)
Germany
Spain
Netherlands



Main Regions (per number of companies)
Campania
Emilia-Romagna
Piedmont

INSURANCE



ESTIMATE TURNOVER 2024:
€2.391.668.000

GROWTH (24-23): **↑ 17%**
OF WHICH INFLATION (24-23): **5,9%**

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION): **↑ 11%**

1	2	3	4	5	6	7	8	9	10
★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★

The **Insurance** sector reached a turnover of 2.4 billion last year with a growth of 17%, of which almost a third (5.9%) was due to price increases. Italian players in the sector represent 75% with a strong presence (70%) also among the top 10. The most represented region among the sector's players is Lombardy.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

+ **79**

ITALIANITY TOP 10

70%

ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)

Germany

France

Switzerland

25%


75%

Main Regions (per number of companies)

Lombardy

Piedmont

CAR AND MOTORCYCLE



ESTIMATE TURNOVER 2024:
€2.508.380.000

GROWTH (24-23): **↑ 15%**
OF WHICH INFLATION (24-23): **-0,7%**

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION): **↑ 16%**

1	2	3	4	5	6	7	8	9	10
★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★

The **Car and Motorcycle** sector reached a turnover of 2.5 billion in 2024 with a 15% increase in value with a slight decrease in prices (-0.7%). Italian companies represent 85% of the sector and the most represented region is Lombardy. Among the foreign countries most present in the sector are Germany and France. The sector's growth was ensured by the slowdown in the purchase of new machines, which increased the need for spare parts.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

6

ITALIANITY TOP 10

30%

ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)

Germany

France

United States

15%

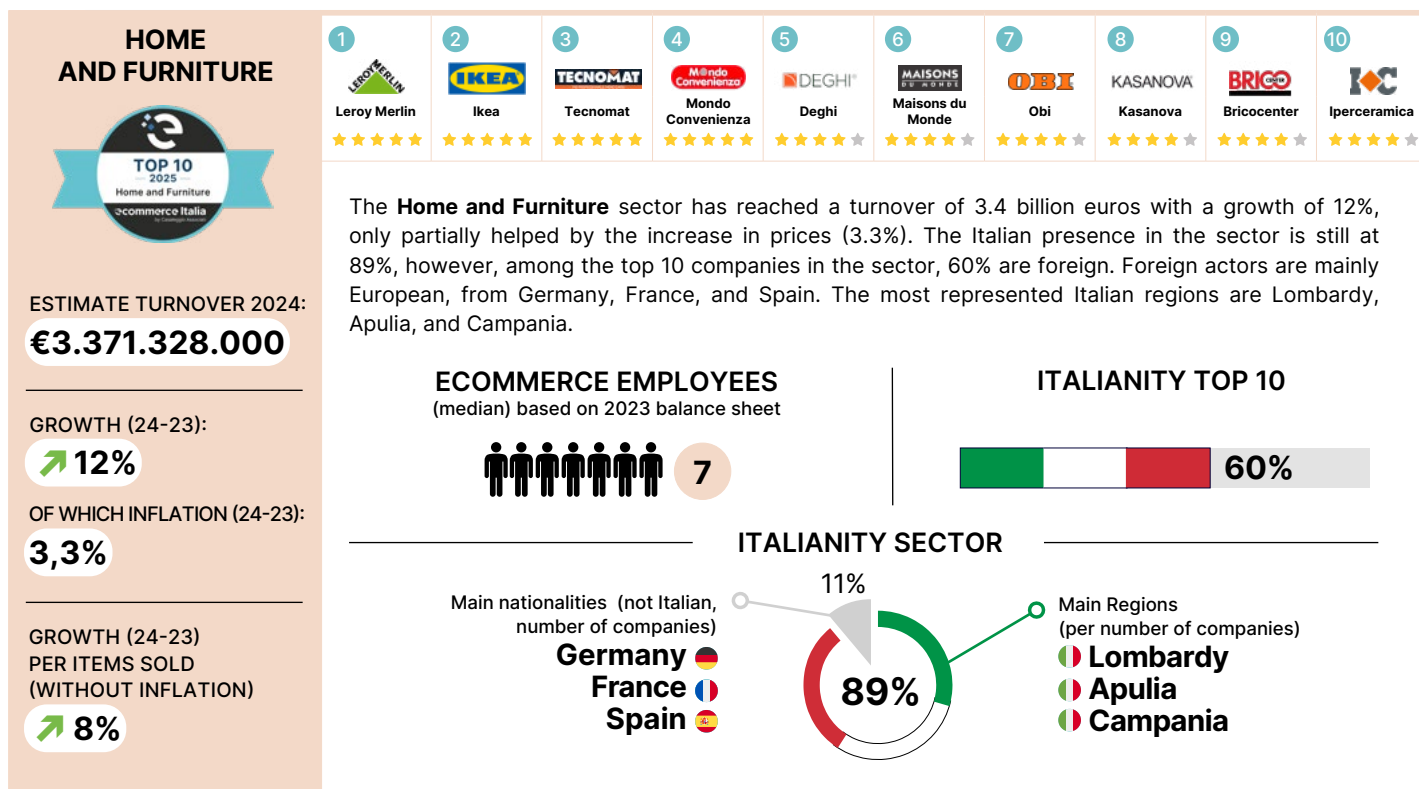
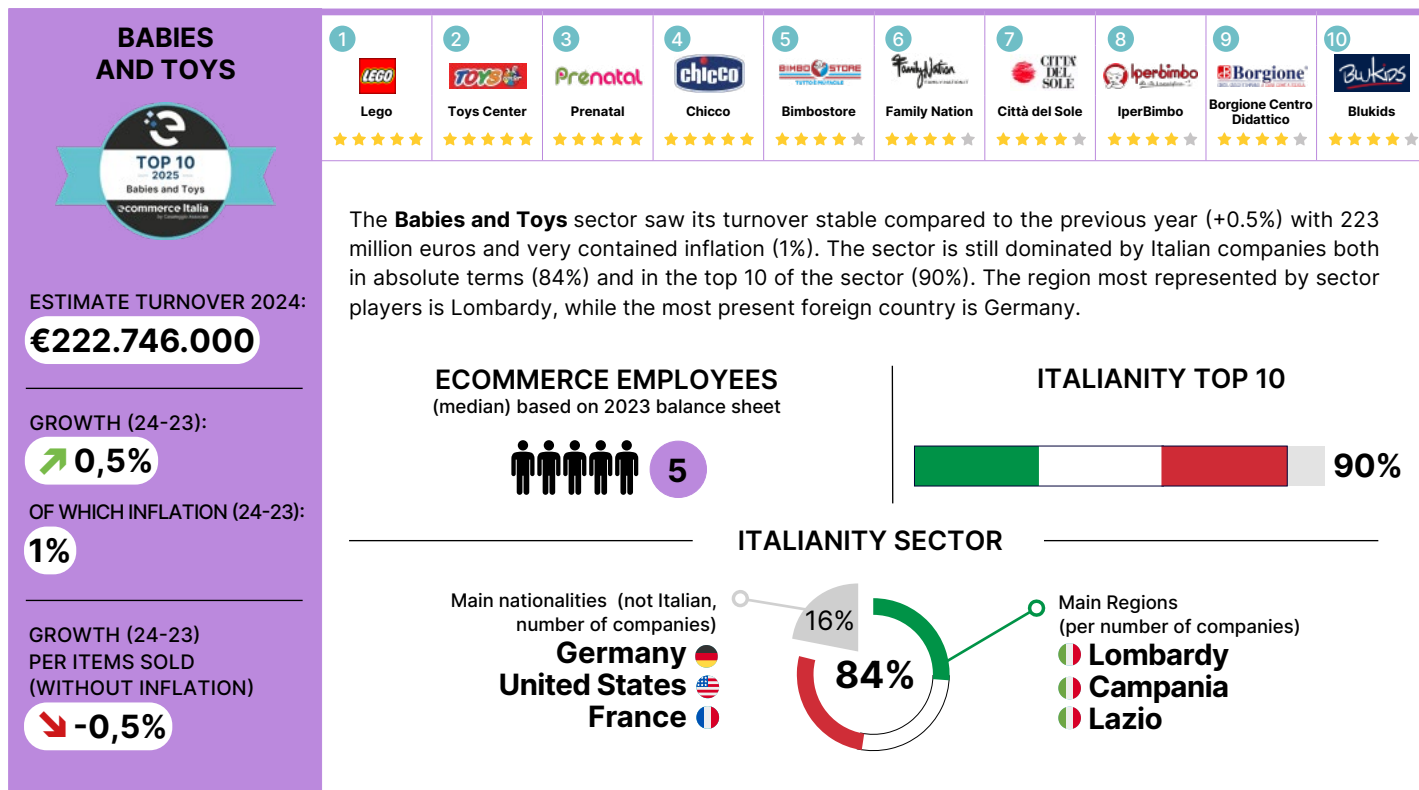
85%

Main Regions (per number of companies)

Lombardy

Lazio

Emilia-Romagna



PUBLISHING



ESTIMATE TURNOVER 2024:
€1.275.842.000

GROWTH (24-23):

-14%

OF WHICH INFLATION (24-23):

0,5%

GROWTH (24-23)
PER ITEMS SOLD
(WITHOUT INFLATION)

-15%

1 Feltrinelli LaFeltrinelli IBS.it ★★★★★	2 Feltrinelli Feltrinelli ★★★★★	3 MONDADORI Mondadori Store ★★★★★	4 LIBRACCIO Libraccio ★★★★★	5 libreriauniversitaria.it Libreria Universitaria ★★★★★	6 PANINI Panini Shop ★★★★★	7 unilibro Unilibro ★★★★★	8 ilGiardino dei Libri Il giardino dei libri ★★★★★	9 Edises Edises ★★★★★	10 abbonamenti.it Abbonamenti.it ★★★★★
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The **Publishing** sector has reduced its online sales revenue to 1.3 billion with a decrease of -14% and almost non-existent inflation (0.5%). The sector is still firmly in the hands of Italian players from a numerical point of view with 91% of Italian presence in the sector and 100% among the top 10. Foreign operators are mainly American. The sector's decline is mainly due to the transition to players present in other sectors (e.g. Amazon in Marketplaces, Netflix in Leisure Time).

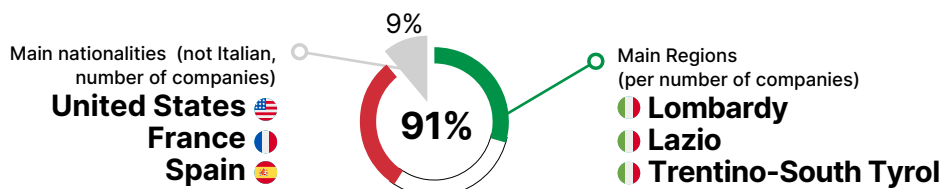
ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet



ITALIANITY TOP 10



ITALIANITY SECTOR



ELECTRONICS



ESTIMATE TURNOVER 2024:
€3.661.547.000

GROWTH (24-23):

4%

OF WHICH INFLATION (24-23):

1,5%

GROWTH (24-23)
PER ITEMS SOLD
(WITHOUT INFLATION)

2%

1 Apple Store Apple Store ★★★★★	2 MediaWorld Mediaworld ★★★★★	3 unieuro UniEuro ★★★★★	4 SAMSUNG Samsung ★★★★★	5 Microsoft Microsoft ★★★★★	6 mi xiaomi Xiaomi ★★★★★	7 euronics Euronics ★★★★★	8 hp HP ★★★★★	9 LG LG ★★★★★	10 GARMIN Garmin ★★★★★
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The **Electronics** sector has recorded a growth of 4%, reaching a turnover of 3.7 billion euros. 74% of the companies in the sector are Italian, while the percentage drops to 40% for the top 10 companies. The regions most represented by sector players are Lombardy, Lazio, and Campania.

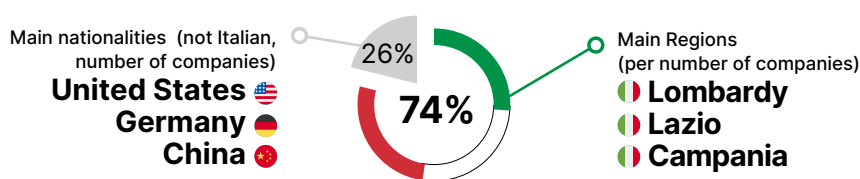
ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet




ITALIANITY TOP 10



ITALIANITY SECTOR



PHARMACIES



ESTIMATE TURNOVER 2024:
€1.093.827.000


GROWTH (24-23): **11%**
OF WHICH INFLATION (24-23): **1,8%**

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION): **9%**


1 Redcare Redcare ★★★★★	2 atida efarma Atida eFarma ★★★★★	3 Dr.Max Dr Max ★★★★★	4 FARMACIA GALLO Farmacia Loreto ★★★★★	5 FARMASAVE Farmasave ★★★★★	6 +farmae Farmae ★★★★★	7 tuttofarma TuttoFarma ★★★★★	8 1000Farmacie 1000 Farmacie ★★★★★	9 Farmacia Guacci Farmacia Guacci ★★★★★	10 FARMACOSMO Farmacosmo ★★★★★
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The **Pharmacies** sector exceeded the one billion euro turnover threshold last year with an 11% growth and contained inflation at 1.8%. The regions most represented by sector players are Campania, Lombardy, and Lazio. The novelty that has interested many is the opening of a physical Amazon parafarmacy in Milan, which could herald imminent investments in the sector by the American giant.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

+  **11**

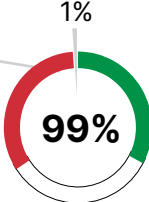
ITALIANITY TOP 10

 **100%**


ITALIANITY SECTOR

Main nationalities (not Italian, number of companies): **France** 🇫🇷, **Spain** 🇪🇸

Main Regions (per number of companies): **Campania**, **Lombardy**, **Lazio**



JEWELRY AND WATCHES



ESTIMATE TURNOVER 2024:
€466.121.000


GROWTH (24-23): **15%**
OF WHICH INFLATION (24-23): **6%**

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION): **9%**


1 PANDORA Pandora ★★★★★	2 Stroili Stroili Oro ★★★★★	3 BUESPIRIT Blue Spirit ★★★★★	4 SWAROVSKI Swarovski ★★★★★	5 CASIO Casio ★★★★★	6 GIOLIA PURA Gioia Pura ★★★★★	7 swatch Swatch ★★★★★	8 OMEGA Omega ★★★★★	9 Cartier Cartier ★★★★★	10 TIFFANY & CO. Tiffany ★★★★★
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The **Jewelry and Watches** sector saw double-digit growth (15%) last year, which was largely driven by a price increase (6%) also due to being considered a safe haven for some. Italian players in the sector represent 40% among the top 10 companies and 83% of the total operators, leaving room for foreign operators mainly from the United States, Germany, and Great Britain. In Italy, operators are mainly from Lombardy.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

 **5**

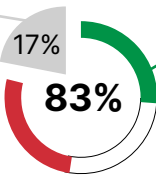
ITALIANITY TOP 10

 **40%**

ITALIANITY SECTOR

Main nationalities (not Italian, number of companies): **United States** 🇺🇸, **Germany** 🇩🇪, **Great Britain** 🇬🇧

Main Regions (per number of companies): **Lombardy**, **Campania/Lazio/Veneto**, **Tuscany**



MARKETPLACE



ESTIMATE TURNOVER 2024:
€14.809.285.000

GROWTH (24-23):

↑ 1,9%

OF WHICH INFLATION (24-23):

1%

GROWTH (24-23)
PER ITEMS SOLD
(WITHOUT INFLATION)

↑ 0,9%

1 amazon Amazon ★★★★★	2 subito Subito ★★★★★	3 ebay eBay ★★★★★	4 TEMU Temu ★★★★★	5 AliExpress AliExpress ★★★★★	6 Etsy Etsy ★★★★★	7 ManoMano ManoMano ★★★★★	8 Marketplace Facebook Marketplace ★★★★★	9 ePRICE ePrice ★★★★★	10 GROUPON Groupon ★★★★★
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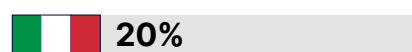
The **Marketplace** sector has recorded a small growth of 1.9%, reaching a turnover of 14.8 billion euros. The sector is strongly dominated by foreign countries in terms of turnover, as eight out of the top 10 players are foreign. The most prominent foreign countries are the United States, China, and Spain. Marketplaces continue to remain the prerogative of Amazon. The acceleration of Chinese players such as Temu and Aliexpress has created a solid low-cost alternative.

ECOMMERCE EMPLOYEES

(median) based on 2023 balance sheet



ITALIANITY TOP 10



ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)



Main Regions (per number of companies)



FASHION



ESTIMATE TURNOVER 2024:
€6.030.757.000

GROWTH (24-23):

↑ 16%

OF WHICH INFLATION (24-23):

4%

GROWTH (24-23)
PER ITEMS SOLD
(WITHOUT INFLATION)

↑ 13%

1 zalando Zalando ★★★★★	2 Vinted Vinted ★★★★★	3 ZARA Zara ★★★★★	4 SHEIN Shein ★★★★★	5 H&M H&M ★★★★★	6 ASOS ASOS ★★★★★	7 OVS OVS ★★★★★	8 YOOX Yoox ★★★★★	9 intimissimi Intimissimi ★★★★★	10 spartoo Spartoo ★★★★★
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The **Fashion** sector has reached a turnover of 6 billion thanks to a 16% growth, largely contributed by the increase in prices (13%). Foreign actors represent 21% of the total actors and 6 out of 10 of the top-ranked ones. Among the most present countries from abroad in the sector, we see the United States, France, and Great Britain. In Italy, the most represented regions are Lombardy, Campania, and Veneto.

ECOMMERCE EMPLOYEES

(median) based on 2023 balance sheet



ITALIANITY TOP 10



ITALIANITY SECTOR


Main nationalities (not Italian, number of companies)



Main Regions (per number of companies)



HEALTH AND BEAUTY



ESTIMATE TURNOVER 2024:
€1.672.635.000

GROWTH (24-23):
16%

OF WHICH INFLATION (24-23):
1,4%

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION)
15%

1	2	3	4	5	6	7	8	9	10
NOTINO	SEPHORA	DOUGLAS	TIGOTA	MYPROTEIN	PINALLI	PROZIS	ADRIALENTI	KIKO	VERALAB
Notino	Sephora	Douglas	Tigotà	MyProtein	Pinalli	Prozis	Adrialenti	KIKO Milano	VeraLab
★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★

The **Health and Beauty** sector has generated over 1.6 billion euros in revenue with a 16% growth in value and a 15% growth in units sold. Italian operators represent 79% of the sector and 60% of the top 10 in the sector. Among the countries most represented in the sector are France, the United States, and Spain. In Italy, the main regions are Lombardy, Campania, and Veneto.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

8

ITALIANITY TOP 10

60%

ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)

France 🇫🇷

United States 🇺🇸

Spain 🇪🇸

21%

79%


Main Regions (per number of companies)

Lombardy

Campania

Veneto

GAMBLING



ESTIMATE TURNOVER 2024:
€5.090.002.000

GROWTH (24-23):
15%

OF WHICH INFLATION (24-23):
0,5%

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION)
14%

1	2	3	4	5	6	7	8	9	10
Sisal	888	SNAI	LOTTOMATICA	GOLD BET	BET365	EUROBET	giochi24.it	BETFLAG	starcasinò
Sisal	888 Casinò	Snai	Lottomatica	Goldbet	Bet365	Eurobet	Giochi24	Betflag	StarCasinò
★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★

The **Gambling** sector had a turnover of around 5 billion euros with a growth of 15% and negligible inflation. Foreign operators mainly come from Malta and Great Britain. The sector is experiencing a strong contraction in physical retail with operators like Flutter and Lottomatica acquiring major competitors. Online, the new multi-year concession that will be released in 2025 will likely reduce the number of operators from around 80 today to less than 30 due to the high costs expected by the Government, which will force operators to merge and form consortia. From the customer's point of view, the contraction will be even more visible because many operators use different brands and sites (the so-called skins) that will be prohibited by the new regulations. (Analysis conducted in collaboration with Agimeg)

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet

17

ITALIANITY TOP 10

70%

ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)

Malta 🇲🇹

Great Britain 🇬🇧

Spain 🇪🇸

16%

84%


Main Regions (per number of companies)

Lazio

Campania

Veneto

SPORT



ESTIMATE TURNOVER 2024:
€2.478.617.000


GROWTH (24-23): **↑ 1,6%**
OF WHICH INFLATION (24-23): **2,2%**

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION): **↓ -0,6%**

1 DECATHLON Decathlon ★★★★★	2 NIKE Nike ★★★★★	3 ADIDAS Adidas ★★★★★	4 CISAIRA Cisalfa Sport ★★★★★	5 FOOT LOCKER Foot Locker ★★★★★	6 JD JD Sports ★★★★★	7 TRADEINN Tradeinn ★★★★★	8 NENCINI SPORT Nencini Sport ★★★★★	9 MAXI SPORT Maxi Sport ★★★★★	10 SPORTER Sporter ★★★★★
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The **Sport** sector reached a turnover of 2.5 billion euros last year with a growth of 1.6%, which however did not match the inflation of 2.2%. 76% of operators are Italian, but in the top 10 only 40% are Italian. Among the most represented foreign countries we see France, United States, and Germany, while in Italy the main regions are Lombardy, Veneto, and Emilia-Romagna.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet



8

ITALIANITY TOP 10



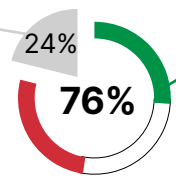
40%

ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)

France 🇫🇷
United States 🇺🇸
Germany 🇩🇪

24%




76%

Main Regions (per number of companies)

Lombardy
Veneto
Emilia-Romagna

LEISURE AND ENTERTAINMENT



ESTIMATE TURNOVER 2024:
€13.444.221.000


GROWTH (24-23): **↑ 9%**
OF WHICH INFLATION (24-23): **2,8%**

GROWTH (24-23) PER ITEMS SOLD (WITHOUT INFLATION): **↑ 6%**

1 TICKETONE Ticketone ★★★★★	2 STEAM Steam ★★★★★	3 VIVATICKET Vivaticket ★★★★★	4 UCI CINEMAS UCI Cinemas ★★★★★	5 THE SPACE CINEMA The Space Cinema ★★★★★	6 GAMING Instant Gaming ★★★★★	7 GAMESTOP Game Stop ★★★★★	8 STRUMENTIMUSICALI Strumentimusicali.net ★★★★★	9 TICKETMASTER Ticketmaster ★★★★★	10 THOMANN Thomann ★★★★★
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The **Leisure and Entertainment** sector reached a turnover of 13.4 billion euros last year with a turnover growth of 9%, of which 2.8% is inflation. 83% of the sector operators are Italian, a percentage that decreases to 50% in the top 10. In Italy, the most represented regions are Lombardy, Piedmont, and Veneto.

ECOMMERCE EMPLOYEES
(median) based on 2023 balance sheet



6

ITALIANITY TOP 10



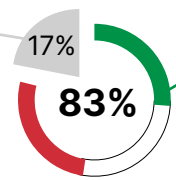
50%

ITALIANITY SECTOR

Main nationalities (not Italian, number of companies)

United States 🇺🇸
Spain 🇪🇸
Germany 🇩🇪

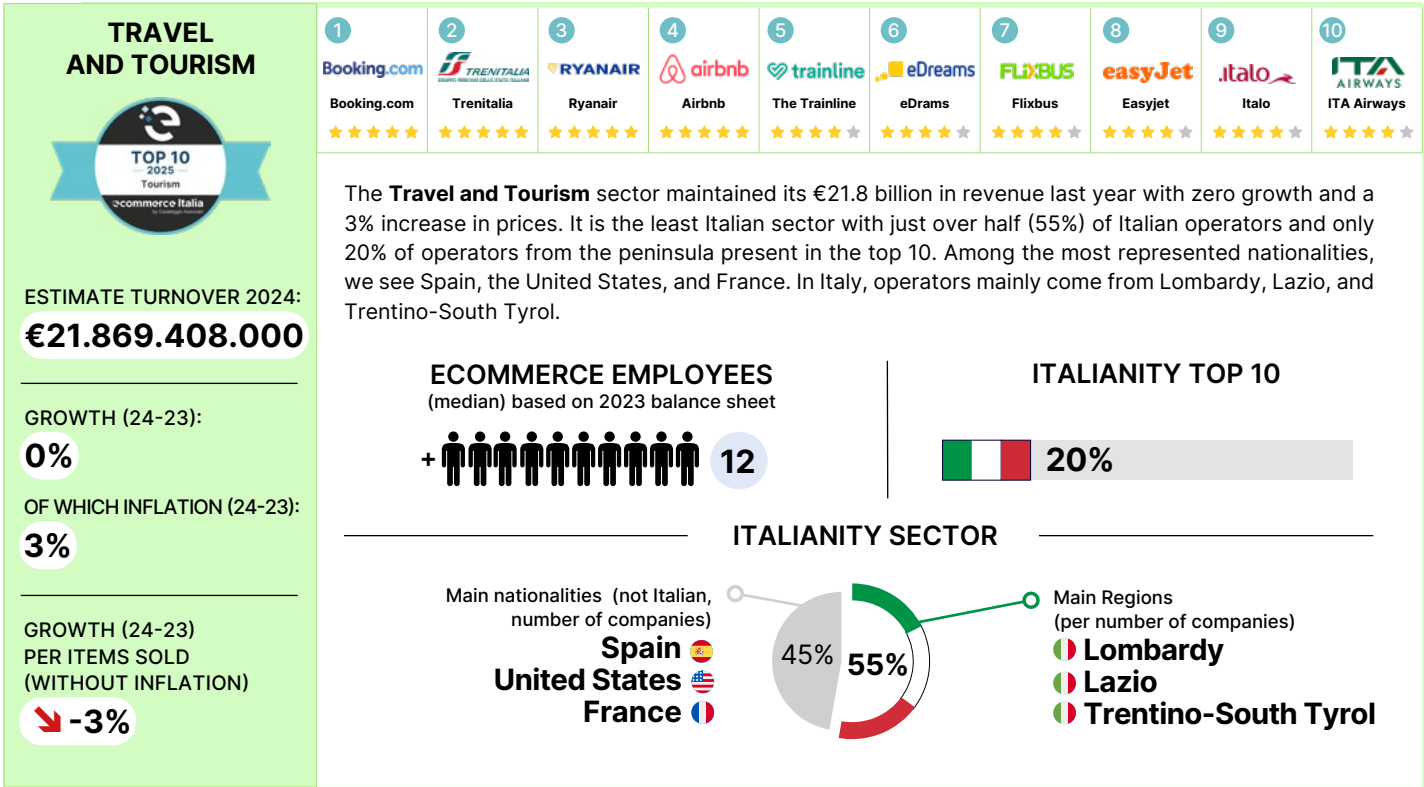
17%



83%

Main Regions (per number of companies)

Lombardy
Piedmont
Veneto



CHAPTER THREE

Ecommerce trends

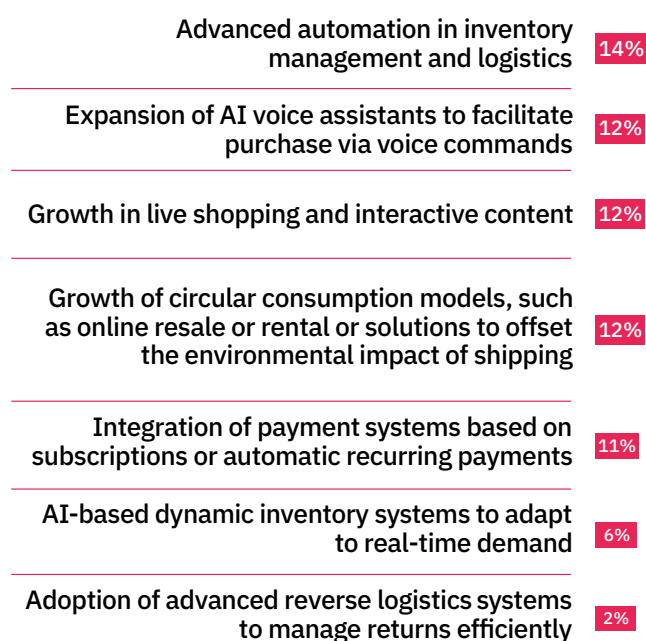
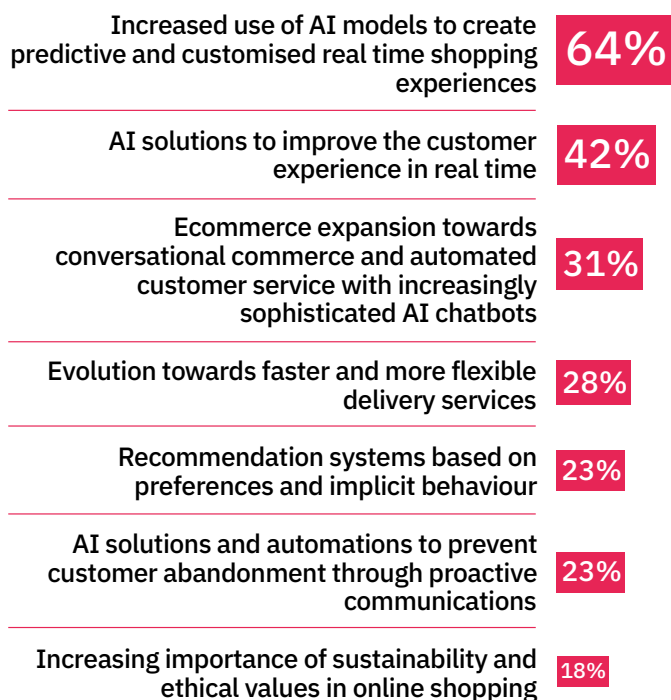
Ecommerce trends

Some significant trends emerge in the Italian Ecommerce landscape that will see a strong acceleration by 2025. 64% of companies indicate a growth in the use of AI models to offer predictive and personalised shopping experiences in real time. In parallel, 42% are investing in AI solutions dedicated to enhancing the customer experience with immediate contextual interactions, while 31% highlight an expansion towards conversational commerce and automated customer service through increasingly advanced AI chatbots. Other relevant changes include faster and more flexible delivery services (28%), recommendation systems based on implicit preferences and behaviour (23%), and AI solutions to prevent customer abandonment through proactive communications (23%). There is also a growing emphasis on sustainability and ethical

values in purchasing decisions (18%), alongside greater automation in inventory and logistics management (14%). Finally, there is growth in live shopping and interactive content (12%), the use of AI voice assistants to facilitate purchases (12%), and circular consumption models such as online resale and rental or environmental offsetting of shipments (12%), as well as the integration of payment systems based on subscriptions or recurring automatic payments (11%). Minor trends include AI-based dynamic inventory systems (6%) and advanced reverse logistics solutions for efficient returns management (2%).

→ What are the main trends emerging and the main changes we will see in 2025?

Graph source: Casaleggio Associati

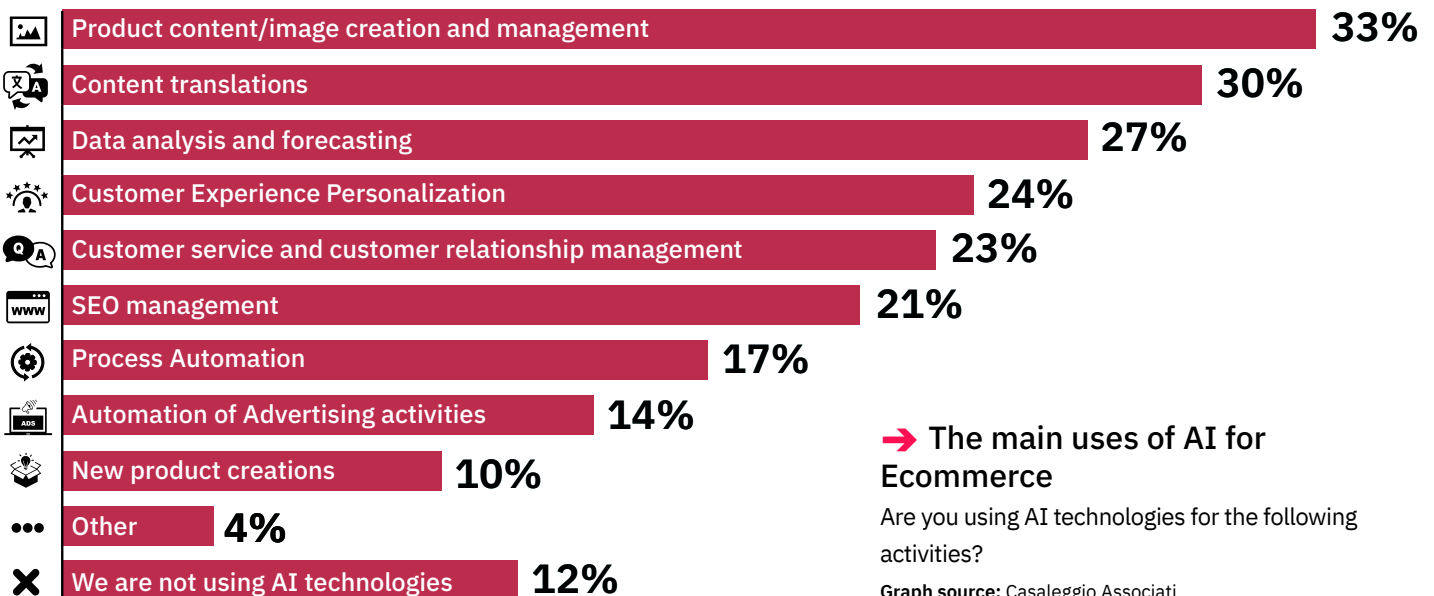
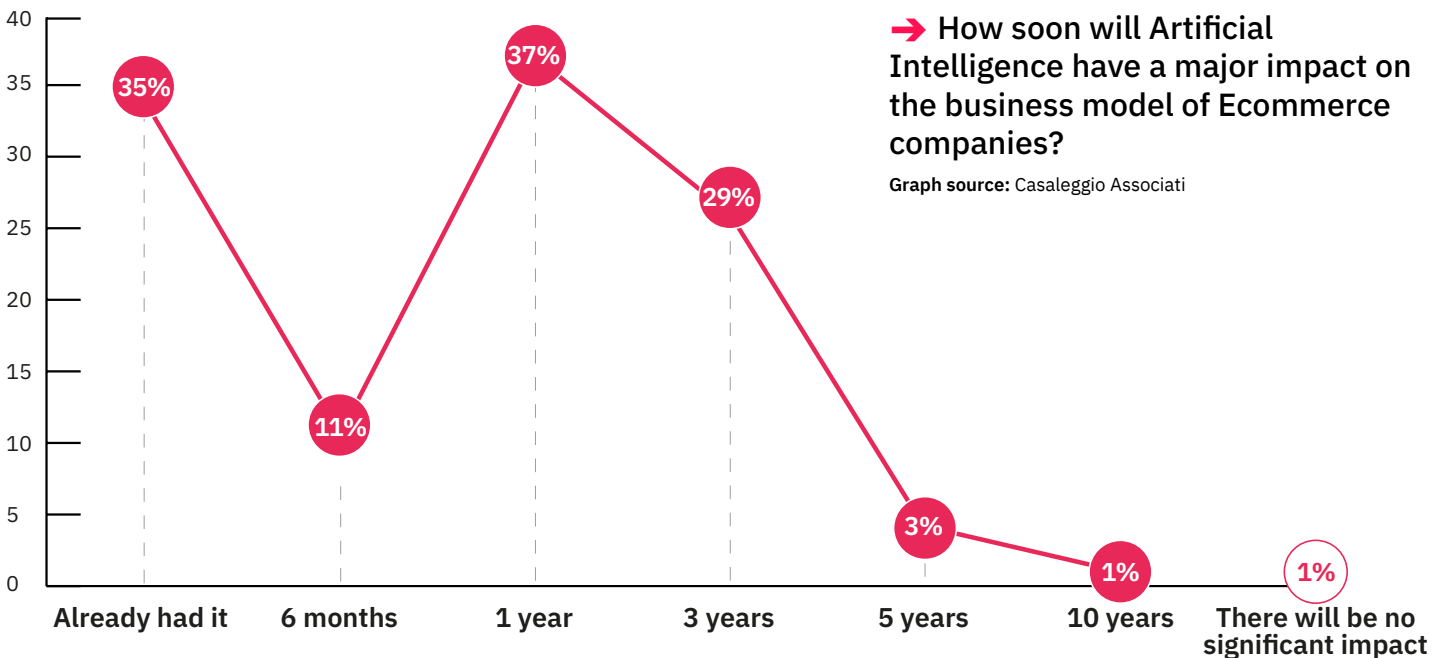


AI-Commerce

35% of Italian Ecommerce companies believe that AI is already having a significant impact on Ecommerce business models (up from 32% last year). Adoption by 28% of merchants, who assumed it would have a significant impact by 2024, came down to a few percentage points of operators actually figuring out how to use AI for their business.

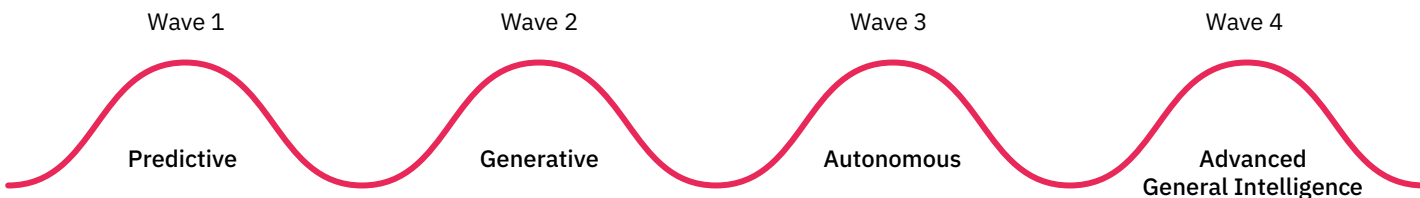
On the other hand, the ranks of optimists have grown significantly with 48% expecting a turnaround by 2025, in addition to about one third of companies who believe they have already seen it.

Artificial Intelligence continues to expand its uses in the world of Ecommerce. If from 2015 to 2022 we saw predictive AI take hold, from 2022 until last year generative AI, 2025 will definitely be the year of agent AI. AI agents in fact do not transactionally return an answer to a question, but 'work' continuously for a goal that is set for them. Among the best-known examples today are OpenAI's Operator and Manus as stand-alone systems, or no-code design systems such as n8n.



→ Waves of AI Development

Graph source: Salesforce/ Coresight Research



Companies that have integrated AI into their processes have adopted it for content and image creation (33% of respondents, was 24% last year), data analysis and forecasting (27%, was 16% last year), automation of advertising activities (14%, same as last year) and other processes (17% vs. 13%).

Walmart has started using LLMs to manage the more than 850 million pieces of information it has on the products it sells. The company claims that it would have needed 100 times the current number of people to manage the process without AI.

For 23%, AI is already being used for customer care management (it was 13% last year) and for 24% for customising the customer experience. Finally, 10% of respondents also use it for new product design.

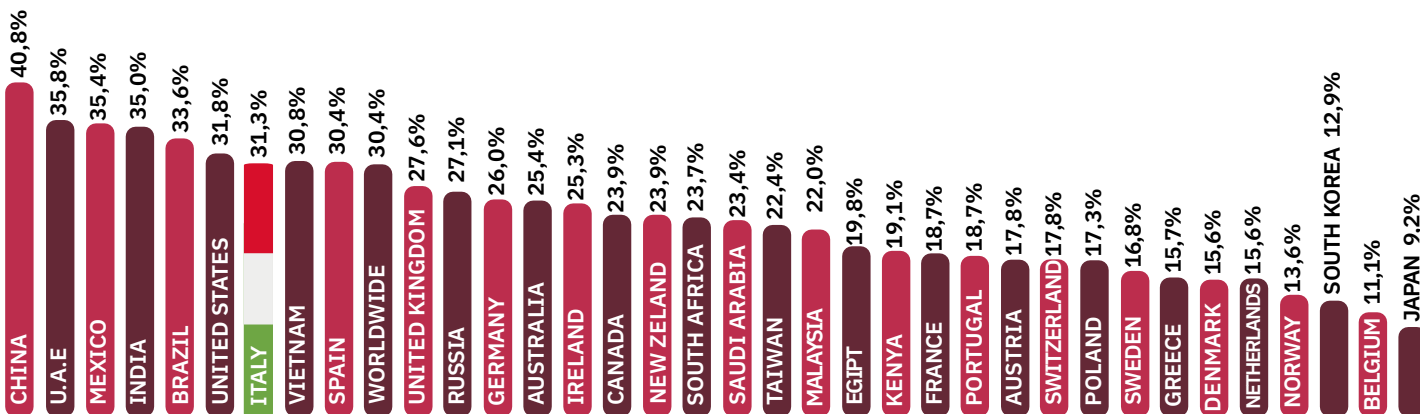
Significant use cases such as content translation (30 per cent) and SEO management (21 per cent) have also emerged over the past year due to significant developments in the quality of services that can be used in SaaS.

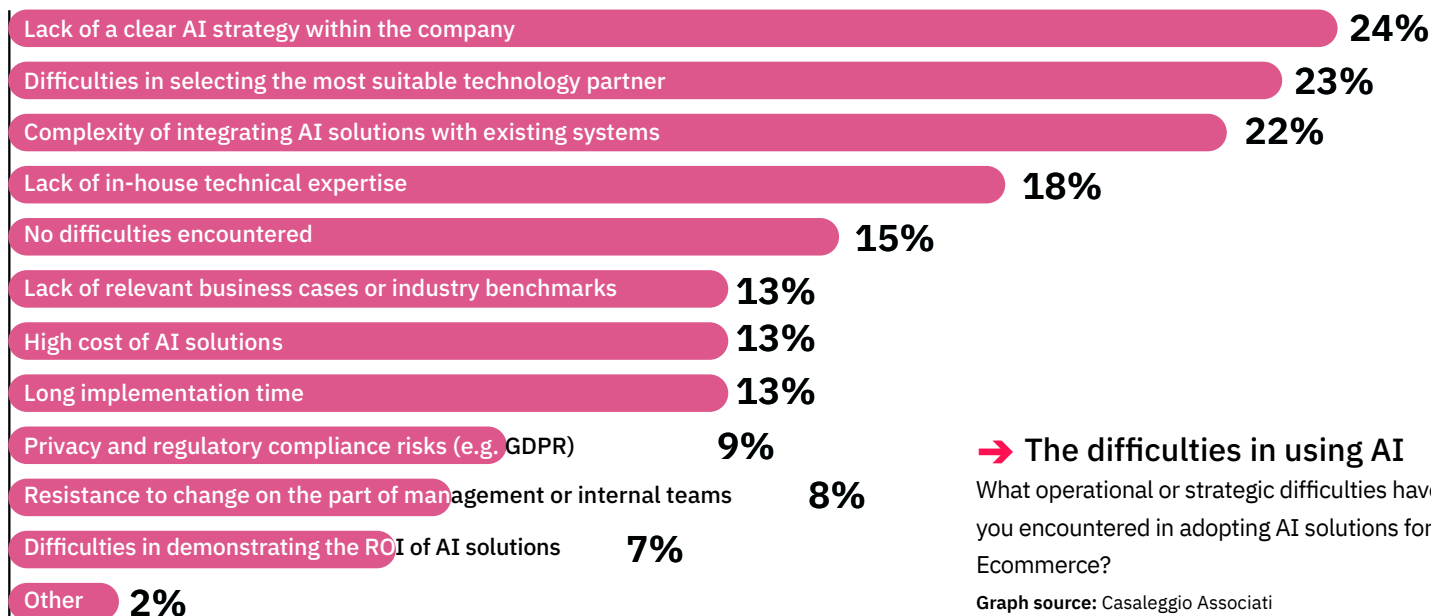
It is precisely for SEO that we are witnessing a shift from the centrality of the keyword, to that of the customer's intent to today that of the AI agent with whom merchants will have to interact by introducing the concept of B2A (Business to Agent). This aspect will go beyond the simple online positioning of one's own content, but will see an important evolution through voice Ecommerce since already today 31% of Italians use their own assistant (e.g. Alexa, Google Home, Siri) at least weekly. By 2025, these devices will increasingly be equipped with AI agent capabilities and thus be able to carry out searches and purchases on our behalf.

→ Use of Voice Assistants

Percentage of Internet users aged 16+ who use Voice Assistants (eg. Siri, Alexa) each week

Graph source: We Are Social, Meltwater, 2025





→ **The difficulties in using AI**
 What operational or strategic difficulties have you encountered in adopting AI solutions for Ecommerce?

Graph source: Casaleggio Associati

Slowing down the adoption of AI are difficulties that pioneer companies are experiencing such as those due to the lack of a clear internal AI strategy (24%), the difficulty in selecting the most suitable technology partner (23%), and the complexity of integrating AI solutions with existing systems (22%). Other significant difficulties include lack of in-house technical expertise (18%), lack of relevant business cases or industry benchmarks (13%), high costs of AI solutions (13%), and long implementation times (13%). Other less frequent obstacles include privacy and regulatory compliance risks such as GDPR (9%), resistance to change from management or internal teams (8%), difficulties in demonstrating the ROI of AI solutions (7%), and finally other minor reasons (2%). Significantly, 15% of the respondents, on the other hand, stated that they did not experience any difficulties.

Live Commerce

Live Commerce was the invention of Taobao in China in 2016. It has since been adopted worldwide and has been growing in Italy for a few years now.

Many liken it to the concept of online TV shopping, but it has a much broader and more engaging impact, and above all it enables a faster and more timely purchase flow.

In the US, revenue from Live Commerce is expected to reach \$68 billion by 2026¹⁸ accounting for between 10 and 20 per cent of total Ecommerce transactions¹⁹.

Those who benefit most are operators with a loyal customer base who like to attend events where they can see and interact with key people in the company, and sectors where an explanation of the product that goes beyond the technical specifications displayed on the page is important.

The success of Live Commerce is based on three main pillars:

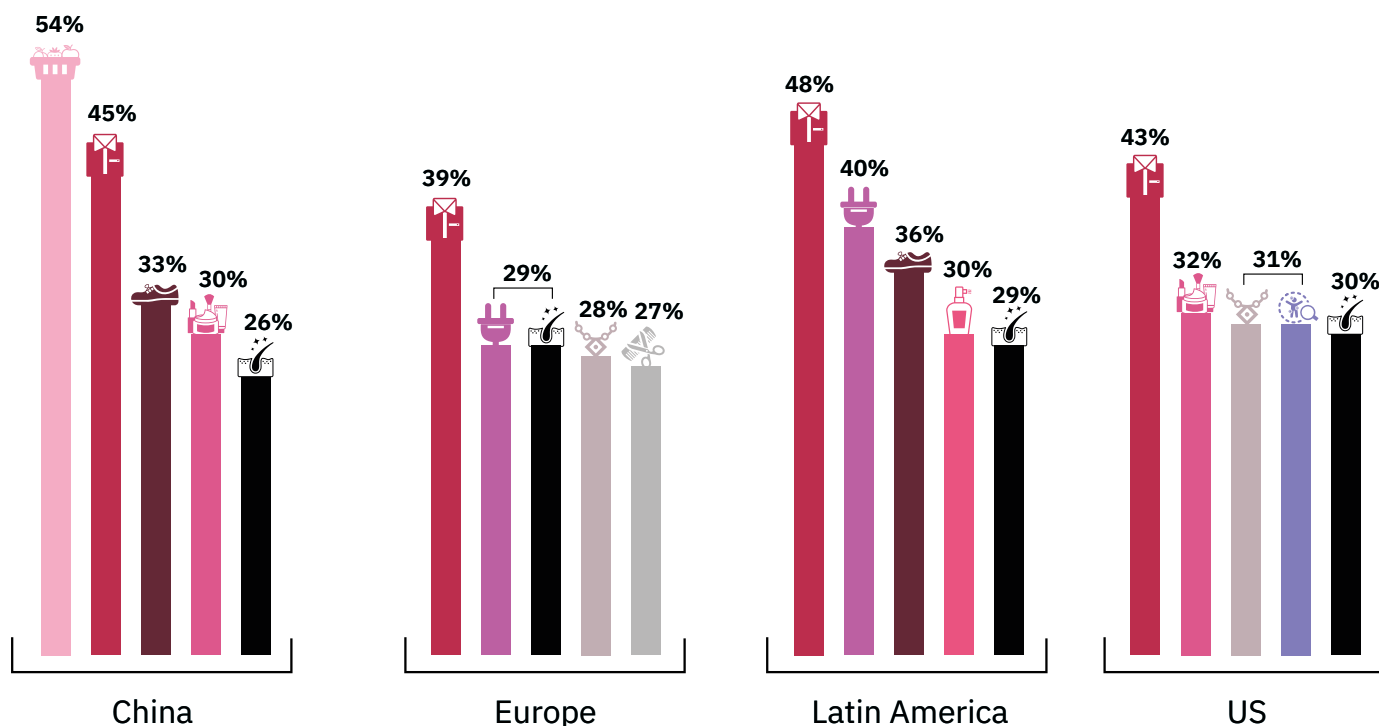
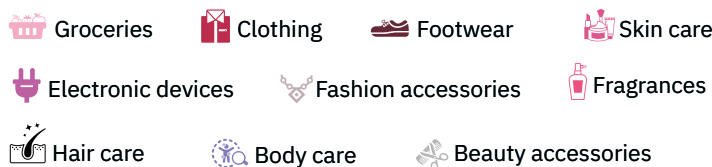
- 1 Interactivity** Consumers can interact directly with presenters, ask questions and get personalised advice, replicating the experience of a physical shop.
- 2 Urgency** Limited time offers and low stocks create a sense of urgency that drives immediate purchase.
- 3 Authenticity** Influencers, brand ambassadors or even company employees show products in action, increasing consumer trust.

If in China the most purchased products - given their wide distribution - are now related to supermarket shopping, in Europe they are related to clothing, consumer electronics and health and beauty²⁰.

18: Source: Statista, 2024; 19: Source: McKinsey; 20: Source: Ready For the Prime Time, McKinsey.

→ Top five categories most purchased via live commerce in past 12 months

Graph source: McKinsey Global Live Commerce Survey, August-September 2022



The success of this format is particularly linked to the choice of platforms used. In China, platforms such as Taobao Live, Douyin, Little Red Book, WeChat, and Kuaishou have succeeded in combining the interaction experience of social media with the purchasing process in the smoothest way possible, enabling a conversion that sometimes exceeds 30% of viewers, more than tenfold the standard conversion rates of Ecommerce sites.

In Italy, a new player in the Live Commerce market is Bazr²¹, but sales volumes are still largely dependent on the use of social media, in particular live videos on TikTok and Instagram. Since March 2025, TikTok Shop has also landed in the Italian market, and will probably be the real test case for the evolution of Live Commerce in the country. Some pioneers such as Michelle Hunziker’s Goovi with b.live are among the first users of this channel. The pioneers of this format in Italy such as ClioMakeUp and Veralab²² measure their success already in the tens of thousands of euros of turnover per live, even if they also reach hundreds of thousands of euros for some live shows. In these activities, the planning of logistics and

warehousing is important, as in the case of Lidl in the UK, which in a market test managed to invoice one thousand pounds per minute, until running out of stock after 19 minutes²³.

To maximise the potential of Live Shopping, Ecommerce managers can follow some effective strategies. First of all, it is essential to collaborate with influencers who share the brand’s values and have followers close to their target audience. In particular, micro-influencers are very useful because they create more genuine engagement, with lower costs per acquisition.

Another opportunity to be seized is represented by live broadcasts: periodic sessions in which new products are presented, temporary promotions are launched, and direct interaction with the public takes place, answering questions in real time. Not surprisingly, data show that around 50 per cent of TikTok users have purchased products after following a live broadcast.

21: Source: Digital4; 22: Source: Tiktok; 23: Source: The Grocer.

App-Commerce

Worldwide, online sales from mobile phones (51.4%) surpassed those from desktops for the first time. Italy is close behind with 42.1% sales from mobile²⁴.

In order to simplify the purchasing process, the major operators have made app-based purchasing available, which stores payment systems and customer data, making the purchase truly 'one-click', as well as perfectly adapting the interface to the device being used. Push notifications, instant accessibility and comfortable navigation mean that the conversion rate via app is significantly higher than via traditional websites.

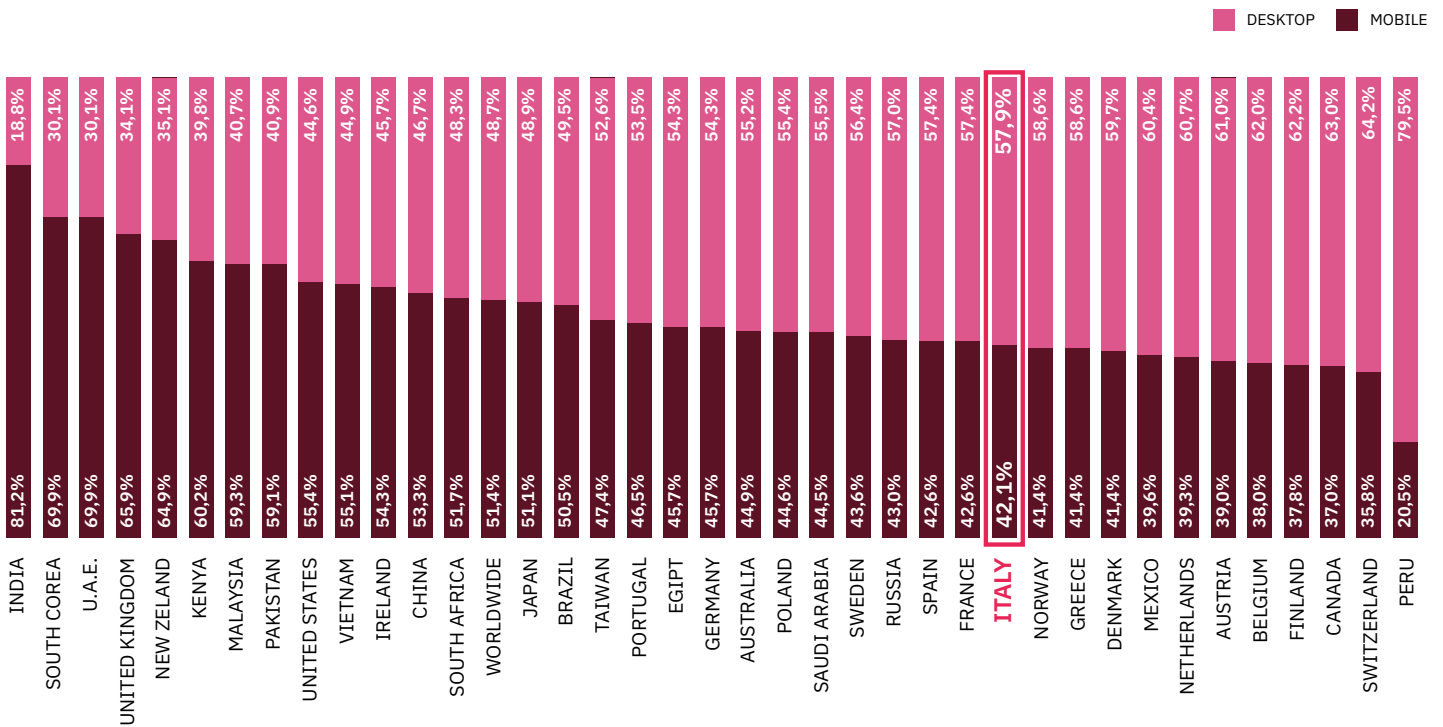
In Italy, merchants offering shopping from apps see on average about one third of their total turnover coming from this channel. The fashion sector is the real exception, as the majority of online turnover today comes from apps, in some cases operators get more than three quarters of their total turnover from the app.

The app is proposed mainly by sites with a high frequency of purchases during the year and thus in general by operators in the upper part of the Ecommerce Italy Ranking or which in any case offer a loyalty programme for their customers. The download action (and any updates during the year) on the part of the customer must in fact be justified in the long term; otherwise it only results as a hindrance to the conversion rate.

➔ Share of Ecommerce purchases by device

Percentage of online consumer goods purchases attributable to Ecommerce activity on each device (B2C only)

Graph source: We Are Social, Meltwater, 2025



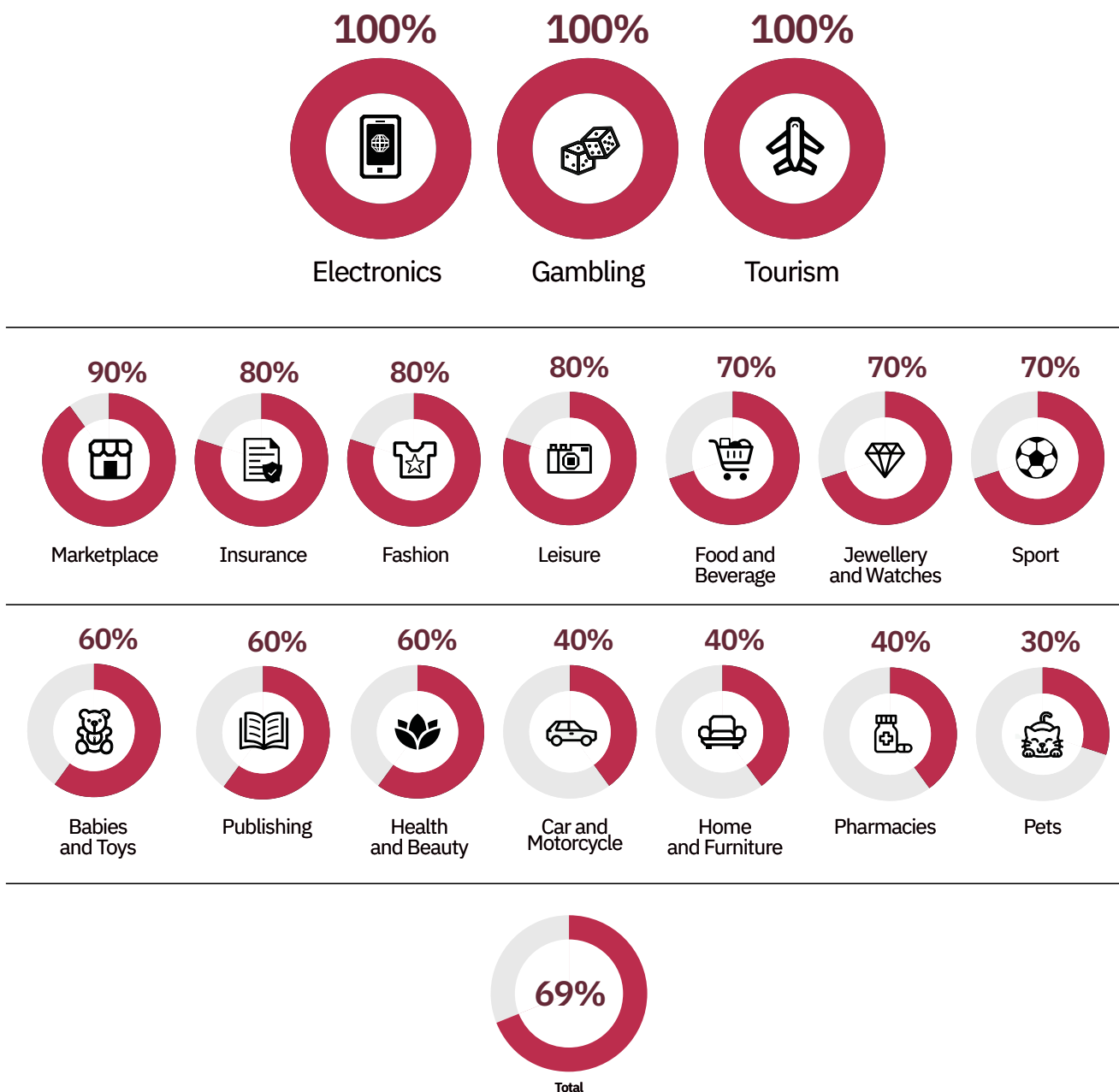
24: Source: Statista, 2025

Analysing the top 10 companies by turnover for the different product categories, a clear trend emerges: in the Electronics, Betting and Gaming and Tourism sectors, all companies have an app. On the contrary, in the sectors Animals, Pharmacies, Home and Furnishing, and Cars and Motorcycles, most of the top companies do not offer an app to their customers. Given the relevance of sales from apps for those operators who offer it as a purchasing method, those who are not offering this purchasing channel today can expect to increase their sales by at least 10% by integrating their sales service with a CRM to manage 1to1 loyalty programmes.

In conclusion, the importance of apps in the Italian Ecommerce landscape is set to grow further, and already accounts for a significant share of the overall turnover of the most advanced merchants in the sector.

➔ Apps in the top 10 of the sector (by online turnover)

Graph source: Casaleggio Associati



Ecommerce under control: the role of regulation

The relevance of Ecommerce in the global economy is increasingly triggering the interest of states in its regulation and supervision. The past year has seen various activities by the European Union and the Italian state in trying to address and monitor this sector.

Accessibility

In order to guarantee the accessibility of online purchasing tools, as of 28 June 2025, the European Accessibility Act (EAA) will affect many Italian companies operating in the Ecommerce and digital services sector. In particular, all companies with more than 10 employees and a turnover of more than EUR 2 million, which sell products or services online directly to consumers, will have to comply. The obligation will also affect manufacturers and importers offering digital or physical goods for the European market, including banking, financial services, tourism or digital platforms. Even companies based outside the EU will have to comply if they offer their products or services on the European market. The only companies excluded are micro-businesses, i.e. those with fewer than 10 employees and an annual turnover of less than EUR 2 million. Those who fall into these categories will have to update their website following the international WCAG 2.1 level AA guidelines²⁵, thus ensuring comprehensible content, easily navigable even without a mouse, compatible with assistive technologies and suitable for users with sensory or motor disabilities. Failure to comply with these requirements could result in penalties ranging from EUR 5,000 up to EUR 40,000, making it crucial for companies to start compliance early to avoid penalties and ensure an inclusive and accessible experience for all.



²⁵: Source: [w3.org](https://www.w3.org).

Market transparency

In 2024, the European Union introduced the Digital Services Act (DSA) and the Digital Markets Act (DMA) to improve transparency, fairness and security in the digital marketplace. The Digital Services Act (DSA) and the Digital Markets Act (DMA) represent two of the most important European regulations recently introduced to regulate digital activities, and they also have a direct impact on Italian Ecommerce merchants. The DSA mainly concerns content management and platform liability. Italian merchants selling online through their own sites or marketplaces will have to pay more attention to the provenance and legality of the products offered, adopting stricter procedures to avoid illegal or counterfeit content. They will also be required to ensure greater transparency in the information provided to consumers, including clarity on online reviews and dispute resolution methods. The DMA, on the other hand, has as its main objective to regulate the behaviour of large digital platforms, defined as 'gatekeepers' (e.g. Amazon, Google, Apple), ensuring fairer competition. Italian merchants could benefit indirectly, as the DMA requires dominant platforms to adopt more transparent and fairer practices towards third-party sellers. This means that Italian merchants could have more favourable commercial conditions, less dependence on platforms and more control over data, prices and commercial strategies.

Transparency for marketplaces

The DAC7 directive, transposed in Italy by Legislative Decree No. 32/2023, introduces the obligation for operators of digital platforms to communicate information on active sellers on their platforms to the tax authorities. This is to ensure greater fiscal transparency and combat evasion in the ecommerce sector. The European regulation DAC7 (Directive on Administrative Cooperation) also has a direct impact on Italian Ecommerce merchants selling products or services through digital platforms. In particular, DAC7 introduces the obligation for digital platforms (such as Amazon, eBay, Etsy, Airbnb, etc.) to periodically communicate to tax authorities information on sellers operating through them. This includes identification data, information on transactions and earnings realised through the platform.

Verification of product certifications

Coming into force on 13 December 2024, Regulation (EU) 2023/988, known as the GPSR, establishes new rules to ensure that all products sold in the European Union, both online and offline, are safe for consumers. This regulation imposes obligations on manufacturers, importers and distributors, requiring them to ensure the safety of products placed on the European market. In practice, this means that an online seller will have to check more carefully that the products offered meet all European safety standards. It will no longer be sufficient to simply rely on the certifications declared by the manufacturer: the merchant will have to directly ensure that each item sold is safe for the end consumer. In addition, product information will have to be more complete and clear: each seller will be required to provide precise indications on the possible risks associated with use and detailed instructions to ensure safe use of the items sold. Online platforms and ecommerce sites will have to implement stricter systems to constantly monitor the products sold, quickly identifying any defective or dangerous items, removing them promptly and alerting both consumers and the competent authorities. In the event of non-compliance with the GPSR rules, Italian merchants risk financial penalties, as well as damage to their image due to the possible removal of products.

Ateco Updates

In Italy, as of 1 April 2025, the classification of economic activities undergoes a significant overhaul with the introduction of 96 new ATECO codes specifically for ecommerce, replacing the only code previously used. This detailed breakdown aims to more accurately represent the different operations in the Ecommerce sector, distinguishing between the sale of physical and digital goods, intermediary platforms and support services such as logistics and customer care. Businesses will have to update their ATECO codes at the Chambers of Commerce to ensure correct identification of their activities and to align with the new classifications.



Taxation

The attention of Italian tax authorities has been focused on the tax practices of Ecommerce multinationals. Recently, the Milan Public Prosecutor's Office launched an investigation into Amazon for an alleged EUR 1.2 billion tax fraud related to sales made in Italy between 2019 and 2021. The accusation concerns the use of algorithms that allegedly allowed non-EU sellers, mainly Chinese, to avoid paying Italian VAT, making Amazon co-responsible for the unpaid taxes. This investigation underscores the growing attention of the authorities to the tax practices of large Ecommerce platforms and the need for greater transparency and compliance with local tax regulations.

Duties

The European Union is planning measures to counter the rise of unregulated imports by Asian online retailers such as Temu and Shein. Proposals include the introduction of a turnover tax on Ecommerce platforms and an administrative fee per item to discourage competition based on extremely low prices and to ensure the safety of imported products.

Omnibus Directive

Transposed in Italy in 2023, the Omnibus Directive aims to strengthen consumer protection in the digital environment. Among the main novelties, it introduces obligations for businesses regarding the transparency of online reviews, prohibiting the publication of false or manipulated reviews. It also requires sellers to clearly indicate whether reviews come from verified consumers who have actually bought or used the product or service.

In summary, recent regulatory initiatives and tax investigations highlight the importance for companies operating in the ecommerce sector to adapt to new regulations, both in terms of business classification and digital accessibility, as well as to ensure strict compliance with current tax laws.

CHAPTER FOUR

Online marketing

Online marketing is evolving towards an ever closer integration with the world of social media, which has become the primary source of site discovery for people up to 35 years of age. Search engines endure as the primary source for people under the age of 54 and finally, television is now the primary source of brand discovery for people over the age of 55.

As far as brand awareness channels are concerned, they are divided according to age groups where young people under 35 are focused on social media, people under 54 are focused on search engines and finally the older age group is still focused on television.

Free delivery remains the main lever to incentivise purchasing in all age groups, followed by coupons and discounts. In third place under 45 years of age are customer reviews, while from 45 years of age and above is the ease of returns.

→ Online purchase drivers

Percentage of internet users in each age group who say each factor would encourage them to complete an online purchase

Graph source: We Are Social, Meltwater, 2025



Online Promotion

When it comes to the online promotion of their brand, a large proportion of Italian companies are still finding it difficult: 41% say they are constantly experimenting and find online promotion difficult (last year the percentage was even higher at 53%). However, more and more companies are finding the right way to promote their business, in fact 46% of them (up from 34% last year) are satisfied. On the other hand, 13% (in line with last year) were completely dissatisfied, as they could not find a system with a good cost/performance ratio.

Marketing and advertising activities

The marketing budget for Ecommerce presents a significantly different distribution compared to the previous year, highlighting new priorities and strategies. Search Engine Marketing (SEM), while remaining dominant, decreases from 38% in 2023 to 30%, indicating a diversification of investments, also due to rising keyword prices. The budget dedicated to SEO also decreases, from 18% to 16%. This phenomenon can be attributed to the automation of several activities that are now manageable with less expensive AI tools.

Advertising on social media remained substantially stable (from 11% to 11.6%), while Email Marketing contracted slightly, from 12% to 11.5%. Investments in Price Comparators (from 3% to 6.1%) and Display Advertising (from 3% to 5%) grew significantly, a sign that immediate and comparative visibility strategies are on the rise.

New strategies such as Branding Activities also emerge, accounting for 3.5% of the budget, while Online Reviews and Reputation Management weighs in at 4.3%. Marketplace Advertising (Amazon, Zalando, etc.) gets 3.2% of the total, reflecting an increasing focus on direct sales via third-party platforms.

Offline campaigns reappear with an investment of 2.6%, signalling a return to multi-channel strategies. Affiliate Marketing grows slightly (from 1% to 2.6%), while Influencer Marketing and Advertorials play a minor role, at 1.9% and 1% respectively.

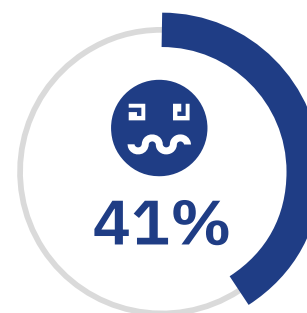
→ Online promotion remains difficult

How do you consider the online promotion activity of your brand?

Graph source: Casaleggio Associati



It is satisfactory.
We have found the way to best promote our Ecommerce site



It is difficult.
We are constantly experimenting



It is unsatisfactory.
We cannot find a system that has a truly beneficial cost-effectiveness ratio



➔ **The Ecommerce marketing budget**

What is the percentage breakdown of your activities marketing and advertising?

Graph source: Casaleggio Associati

Programmatic advertising is definitely one of the new trends that has shifted advertising budgets. The possibility of relying also on AI systems to choose advertising in real time according to the target, the price at a certain instant and the availability of stock on the part of the merchant has opened up a new avenue to make advertising investments more profitable.

SEM has seen an increase in cost due to Google’s business strategies, but also due to aggressive strategies by Chinese giants targeting Western competitors. For example, Temu invested in keywords such as ‘Walmart’s Black Friday deals’, ‘Kohl’s Black Friday’ and ‘Bed Bath Beyond’. On the other hand, Shein focused on keywords such as “Walmart clothing”, “Zara jeans”, “Mango clothes” and “Nordstrom Rack shoes”. This kind of aggressive strategy resulted in keywords such as ‘Walmart apparel’ costing 16 times in just two years²⁶.

26: Source: Reuters.

CHAPTER FIVE

Selling abroad

Strategies for foreign market presence and turnover

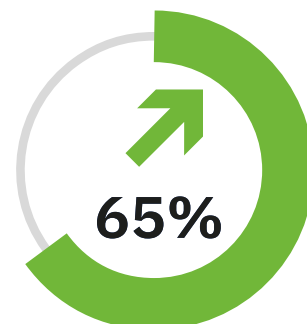
Almost half of the surveyed merchants (49%) sell only in Italy, while 36% have a multilingual site and also sell abroad. Only 11%, however, have a strong international presence (up from 7% last year), while another 4% (down from 7% last year) claim to be able to sell abroad via marketplaces.

Turnover generated abroad accounts on average for 27.5% of the total and only for just over a quarter of the companies does the incidence exceed 50%. During the past year, sales abroad increased in 65% of the cases for the companies involved in the survey, while they were stable for 33% and decreased in only 2% of the cases.

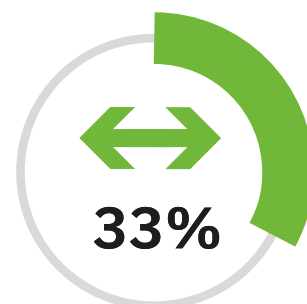
→ Foreign sales

Compared with the previous year, Ecommerce sales from abroad are:

Graph source: Casaleggio Associati



Increased



Stable

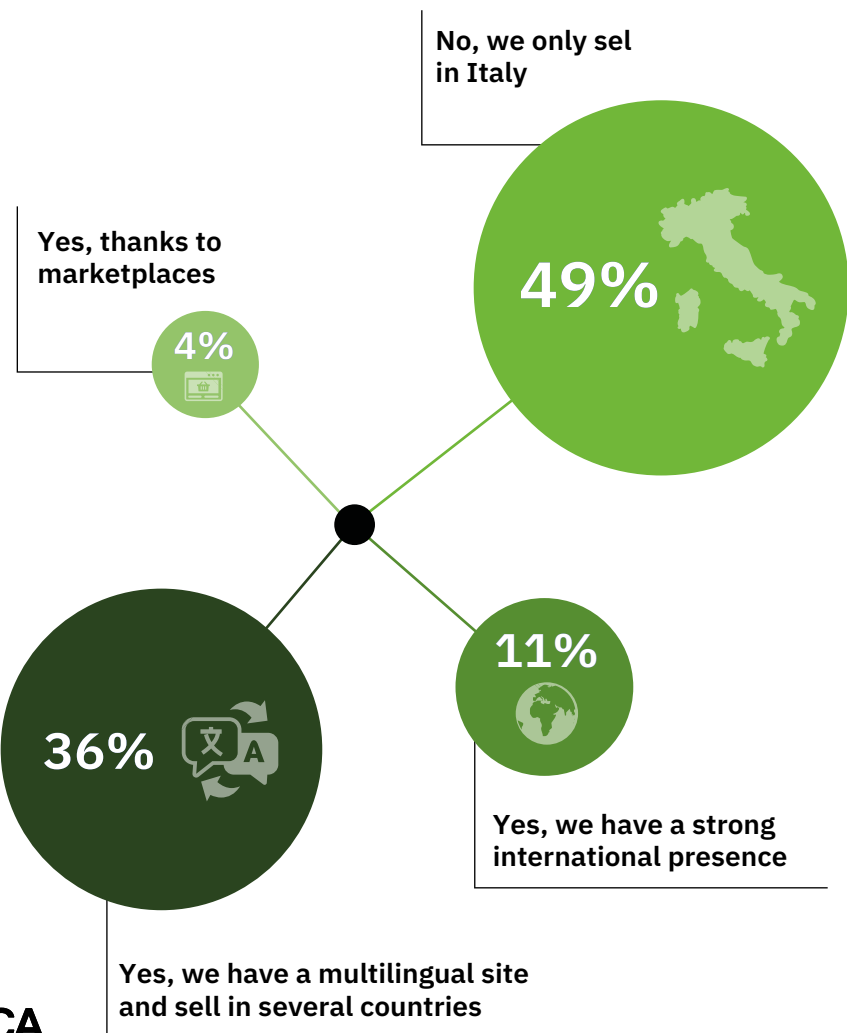


Decreased

→ International presence

Does your Ecommerce have an international presence?

Graph source: Casaleggio Associati



Foreign markets with greater presence of Italian companies

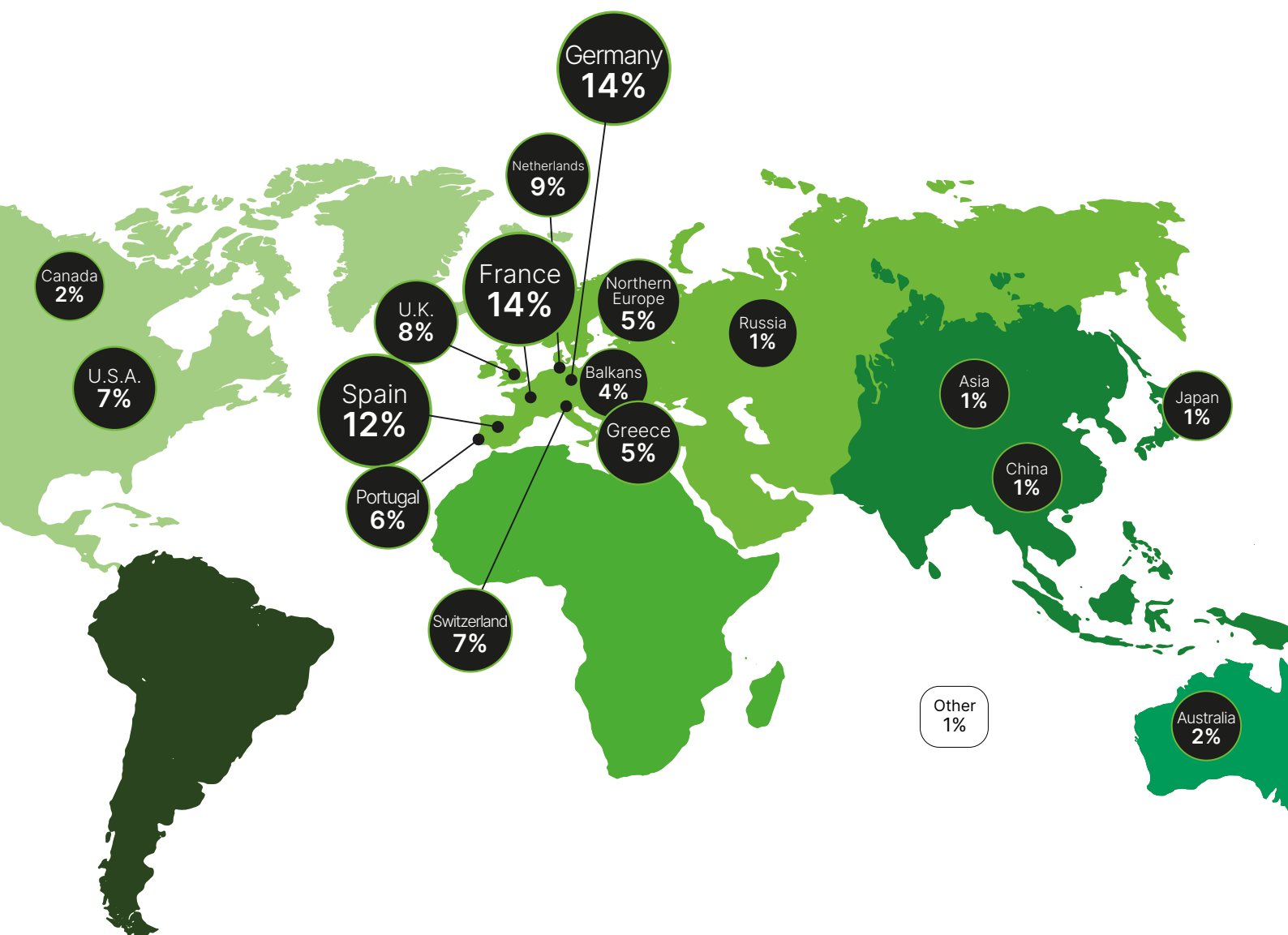
Foreign presence is becoming increasingly marked in a variety of countries. France and Germany emerge as the preferred international markets for Italian exhibitors, both reached by 14% of Italian operators. They are followed by Spain (12%), the Netherlands (9%), the UK (8%), Switzerland and the USA (all at 7%). More distant markets such as Australia, Canada and Asia are less relevant, each reached by 1-2% of operators. Latin America, India and Africa do not currently attract significant Italian operators, confirming a low penetration in these regions.

Switzerland and the USA (all at 7%). More distant markets such as Australia, Canada and Asia are less relevant, each reached by 1-2% of operators. Latin America, India and Africa do not currently attract significant Italian operators, confirming a low penetration in these regions.

→ Top countries for Ecommerce exports

What are the nations/areas, besides Italy, in which you sell online?

Graph source: Casaleggio Associati



CHAPTER SIX

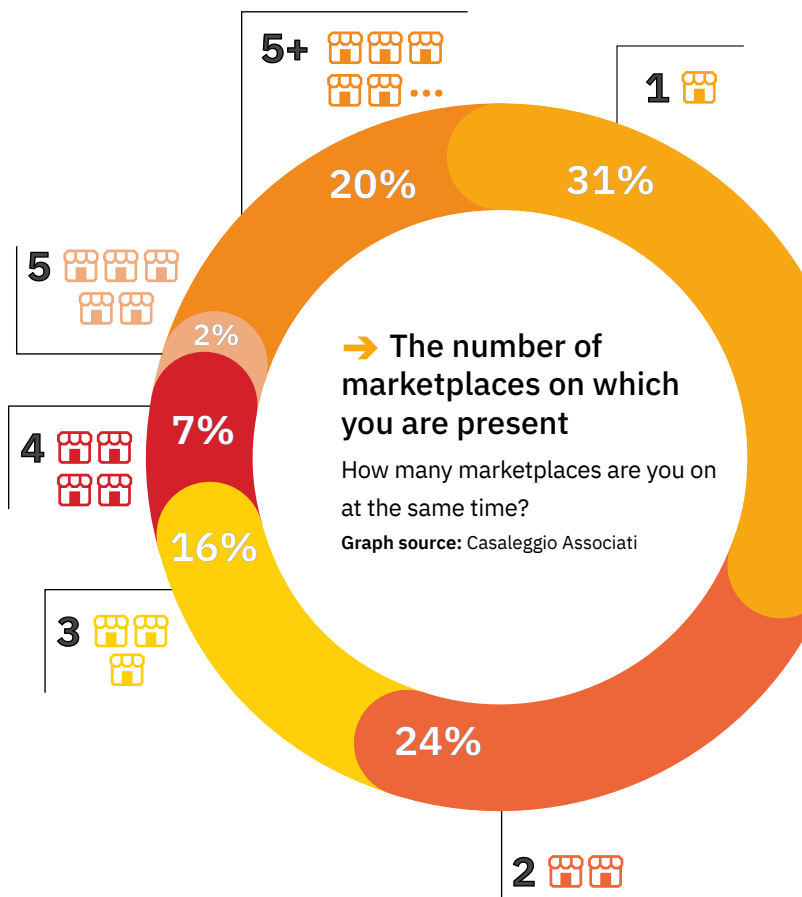
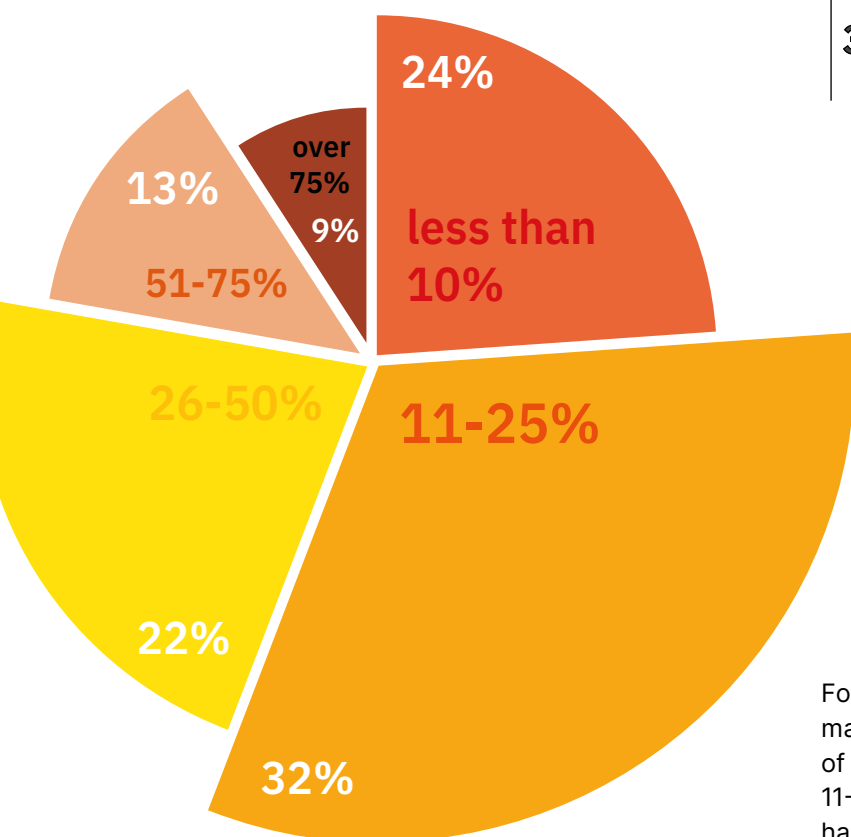
Selling on Marketplace

53% of Italian merchants sell on marketplaces, but for many the number of those used remains small. 31% sell on only one marketplace, while 24% sell on 2 marketplaces. Only 16% sell in 3 marketplaces and the percentage drops to 7% for those selling in 4 and 2% for those selling in 5. A good 20% finally sell in more than 5 marketplaces. The sector most reluctant to use marketplaces is the pharmacy sector.

→ Turnover through marketplace

What percentage of online sales are generated through marketplaces?

Graph source: Casaleggio Associati



For more than half of the companies (54%) selling on marketplaces, the weight of these platforms in terms of turnover is still less than 50% (for 32% in the range 11-25%, for 22% in the range 26-50%). On the other hand, 22% of the companies that use marketplaces have a turnover share of more than 50% (for 9% it is even more than 75%, for 13% in the range 51-75%). For a remaining 24%, the incidence is less than 10%.

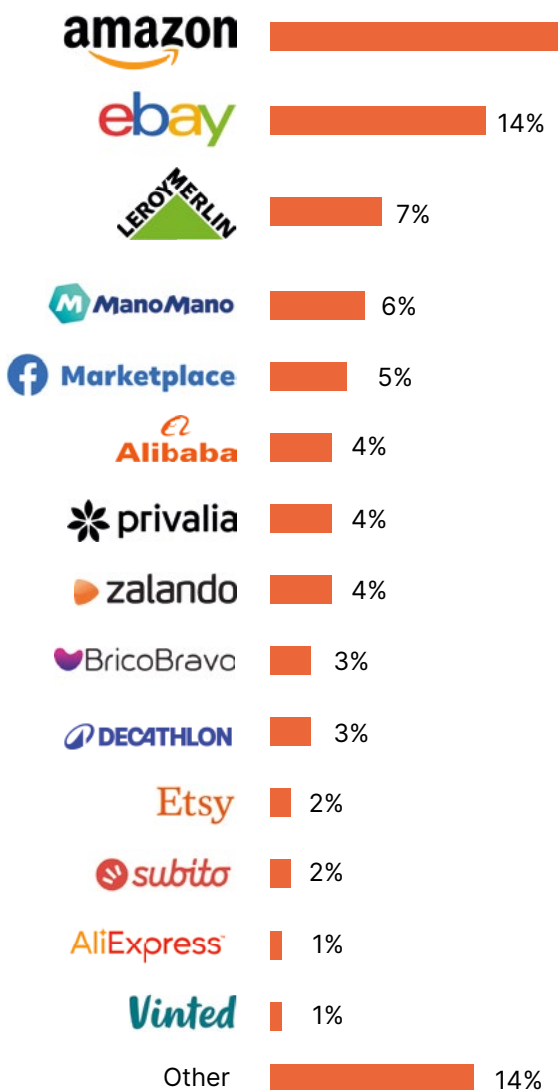
In Italy, Amazon clearly dominates the panorama of the marketplaces used, with 40% of the preferences, confirming its role as absolute leader in the sector (in the United States alone it manages over 42% of total Ecommerce turnover of which over two thirds is generated through third party sellers²⁷), confirming itself as the preferred platform for online sales. It is followed, at a significant distance, by Ebay with 14%, and Leroy Merlin with 7%. ManoMano (6%) and Facebook (5%)

occupy intermediate positions, while Alibaba, Privalia and Zalando each register 4% of the preferences. Other marketplaces such as Brico Bravo and Decathlon are used by 3%, followed by Etsy and Subito (both 2%). Among the emerging platforms we see Vivino, Glovo, Chrono24, Miravia (by Alibaba, for now started in Spain), Kaufland (for now for German, Austrian and Eastern European markets), Fnac and Cdiscount.

→ The most used marketplaces

What marketplaces do you use?

Graph source: Casaleggio Associati



→ In which country are the most popular global marketplaces seeing the highest use?

Graph source: Ecommerce Trends Report

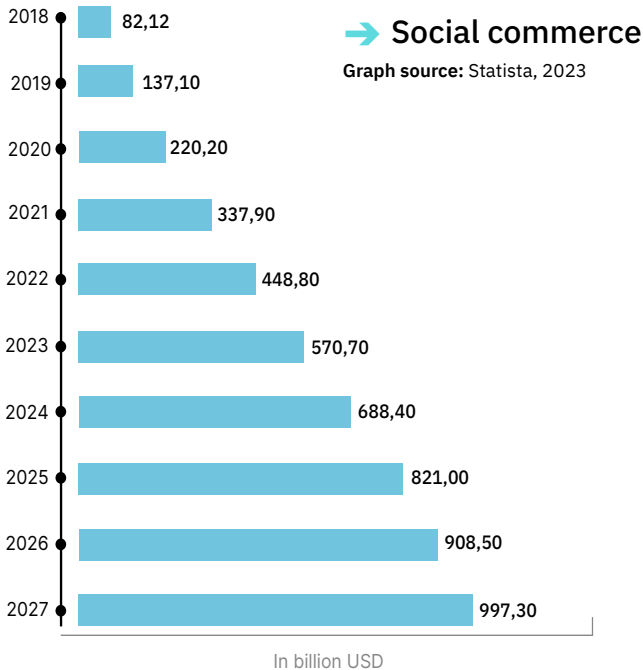
India	Amazon
South Africa	Shein
UAE	Temu
Australia	eBay
Malaysia	Shopee
Nigeria	Alibaba/AliExpress - Jumia
Sweden	Zalando
Argentina	Mercado Libre/Livre
Poland	Vinted

27: Source: SEC filings, 2024.

CHAPTER SEVEN

Social Media

The Ecommerce social media market continues its growth; globally, it is estimated at USD 821 billion by 2025, with a forecast for 2027 of approximately USD 1 trillion²⁸.



Italian companies' favourite social networks

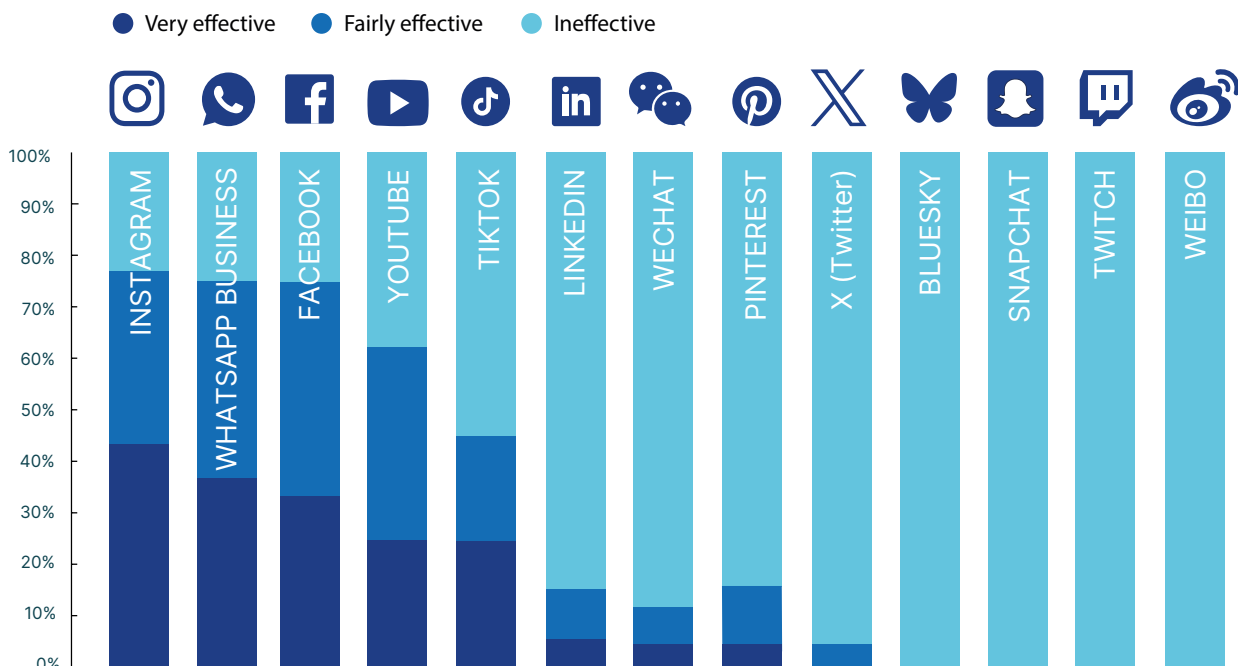
Among the most effective social networking sites, Instagram once again came first with 44% of the preferences, followed by Whatsapp (37%) and Facebook (34%). It should be noted that the Top 3 is made up of companies all belonging to the Meta group.

Next among those considered most effective are YouTube (22%) and TikTok (22%), as well as LinkedIn (which fell from 19% to 6%). However, a strong dichotomy is evident for many of these, depending on sectors, users and objectives: suffice it to say that social networks such as X (formerly Twitter) and WeChat are considered ineffective in 96% and 87% of cases respectively, as is Pinterest (83%). Even LinkedIn itself still generates perplexity and is considered ineffective by 76% of respondents. Much more negative, sharply, was the judgement towards Twitch and Weiboo as tools for converting online sales.

→ The most effective social

What social media do you find most effective for your business?

Graph source: Casaleggio Associati



28: Source: Statista, 2023.

Social media and ROI

The formula for using social media in Ecommerce has not yet been found. Only 37 per cent of companies are satisfied with their social media performance (up from 31 per cent last year), 18 per cent consider it to be completely unsatisfactory (up from 23 per cent last year) and the remaining 45 per cent (in line with 46 per cent last year) are struggling to find a solution.

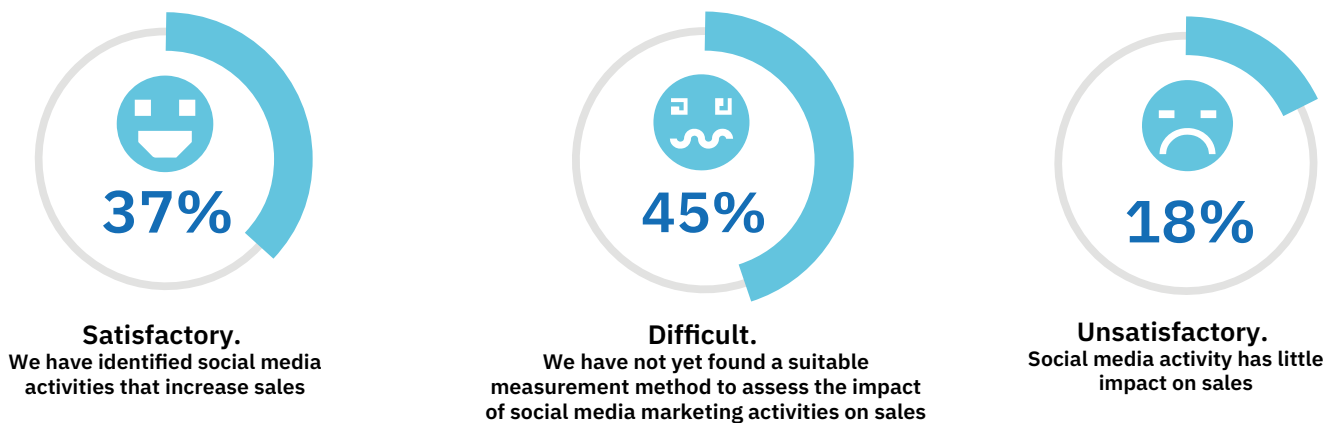
→ Social media advertising remains difficult

How do you consider social media marketing activity in terms of generating sales and return on investment?

Graph source: Casaleggio Associati

Social media investment forecasts

Compared to last year, the percentage of companies planning to increase their investment in social media activities in 2025 is on the rise: from 37% last year to 45% this year. On the other hand, the number of companies deciding to keep their investment stable is decreasing (37% vs. 43% last year). Only for 7% of the companies surveyed will the investment be reduced (vs. 9% last year) and only for 11% will it not be planned at all in 2025 (vs. 10% in 2024).



→ Social media investments

What is the social media investment forecast for 2025?

Graph source: Casaleggio Associati

CHAPTER EIGHT

Organisational structure

To guarantee a competitive service, it is necessary to have an organisational machine of excellence. For this reason, areas that might be given as more established, actually continue to innovate.

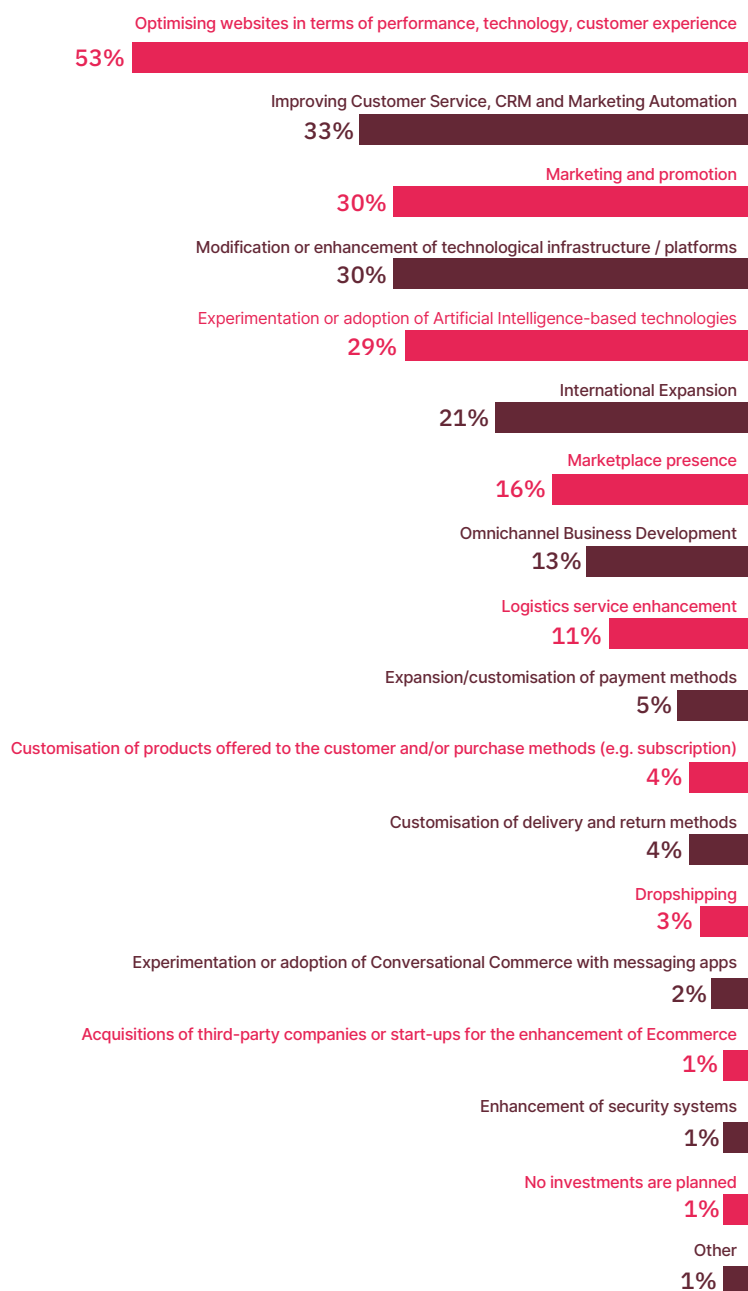
Short-term investments

This year, short-term investments by Italian companies are mainly directed towards two main options: optimisation of the site in terms of performance, technology and customer experience (53%), while in second place are investments in improving customer service, CRM and marketing automation (33%).

This is closely followed by investments in marketing and promotion (down one position, from 44% to 30%), changes or upgrades to technology infrastructure/platforms (30%) and experimentation or adoption of AI-based technologies (29%).

This was followed by investments in international expansion (21%), marketplace presence (16%), omnichannel business development (13%) and logistics service enhancement (11%).

Lower priority investments (<10%) include customisation or expansion of payment methods (5%), customisation of products and purchasing methods (4%), customisation of delivery and return methods (4%), dropshipping (3%) and experimentation with messaging apps (conversational commerce) at 2%. At 1%, on the other hand, acquisitions of third-party companies or start-ups for enhancing Ecommerce and strengthening security systems. Only one per cent of the respondents do not plan to invest at all.



→ Short-term investments

Where do you plan to focus your investments in the short term?

Graph source: Casaleggio Associati

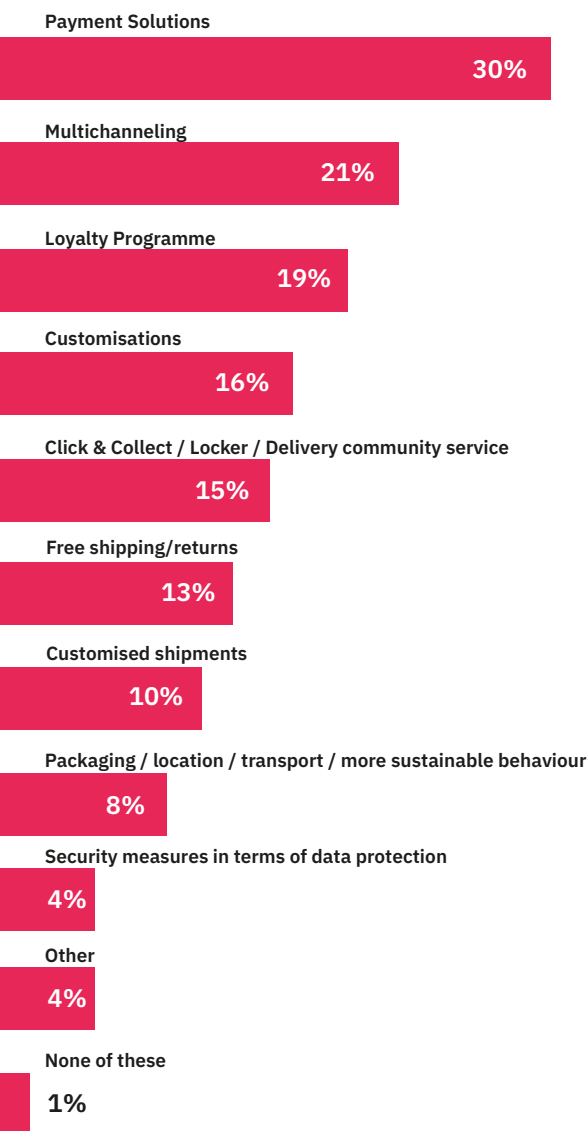
The organisational structure for Italian Ecommerce companies mainly concerns payment solutions (30%), Multi-channel (21%), Loyalty Program (19%) and Customisation (16%).

This is followed by new delivery solutions (click & collect, locker, etc.) in 15% of the cases surveyed and free shipping and returns in 13%, as well as customised shipments with 10%. Only 8%, on the other hand, stated that they would review packaging, transport and general business behaviour with a view to greater sustainability, a special case to point out if we take into account the increasing attention of consumers to these details.

→ Strategies to increase sales

What strategies do you put / will you put in place to increase online sales?

Graph source: Casaleggio Associati



On the sustainability front, 23% of the companies surveyed, for example, say they already engage in policies to promote recycling and reduce material consumption, just as 21% already offer their customers sustainable, recyclable or reusable packaging.

14% prepare corporate sustainability reports internally, while 12% have the reduction of CO2 emissions as an additional goal.

But this does not mean that more cannot be done: there are still only 10% who use sustainable means of transport or couriers, have already obtained sustainability certifications, contribute financially to support corporate sustainability initiatives and organise specific training for their staff.

Finally, only 7 per cent include corporate sustainability data in their financial statements, only 5 per cent know what their customers think about sustainability, and only 4 per cent use zero-impact server processing power.

→ Strategies for Ecommerce Sustainability

Compared to Sustainability, your company:

Graph source: Casaleggio Associati



Logistics

Logistics management is evolving, but still slowly due to investments to be amortised or planned for a change in the current set-up

Logistics in most cases still remains the responsibility of the company (65%).

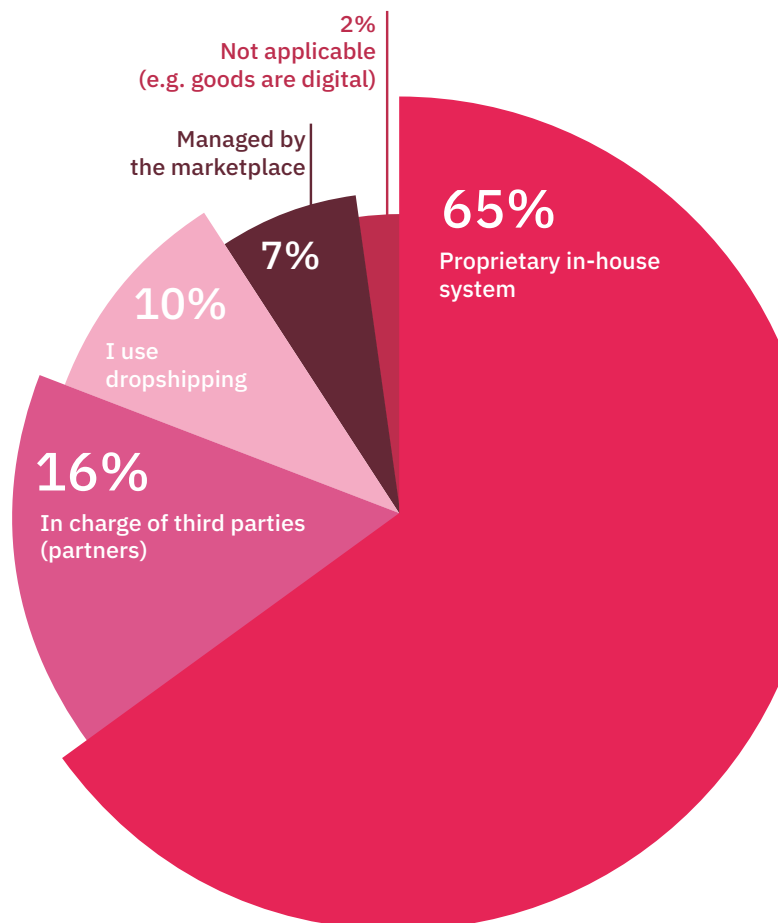
The percentage of those relying on third-party partners is growing (16% vs. 14% last year) while the percentage of companies also relying on marketplaces for warehousing and deliveries is slightly down (7% vs. 11% last year). The number of those relying on dropshipping is increasing (10% vs. 5% last year).

The degree of satisfaction of companies with logistics services also increased: for the majority (88% vs. 51% last year), they are still improvable (it depends a lot on the suppliers), while for only 6 % the service is completely satisfactory. For another 6%, however, we found complete dissatisfaction with the need to review suppliers.

→ The warehouse still remains in the company

Warehouse management is:

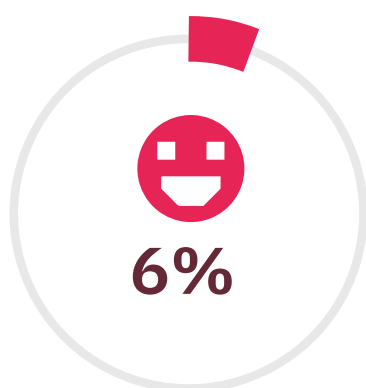
Graph source: Casaleggio Associati



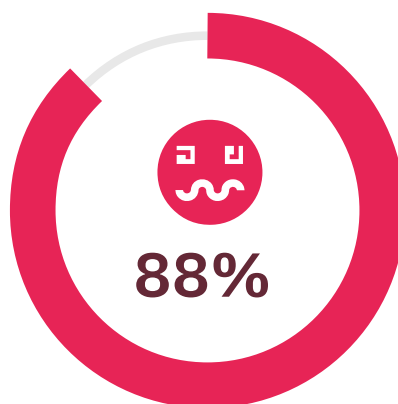
→ The shipping service has room for improvement

How do you rate the service offered by your suppliers for shipping services?

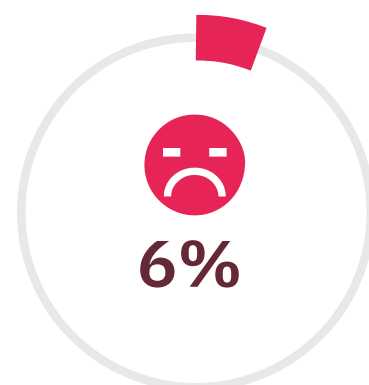
Graph source: Casaleggio Associati



Satisfactory.
We feel we have achieved an ideal quality/cost ratio.



Improvable.
One or more suppliers are not up to our requirements.



Unsatisfactory.
We will change one or more suppliers shortly.

Delivery expectations on the part of Italian customers remain higher than the European average, with 24% of customers wanting next-day delivery and the majority of customers (55%) on the peninsula not wanting to wait more than two days²⁹.

The ongoing global evolution in payment systems is the transition to A2A (account-to-account) methods that eliminate intermediate layers to optimise costs.

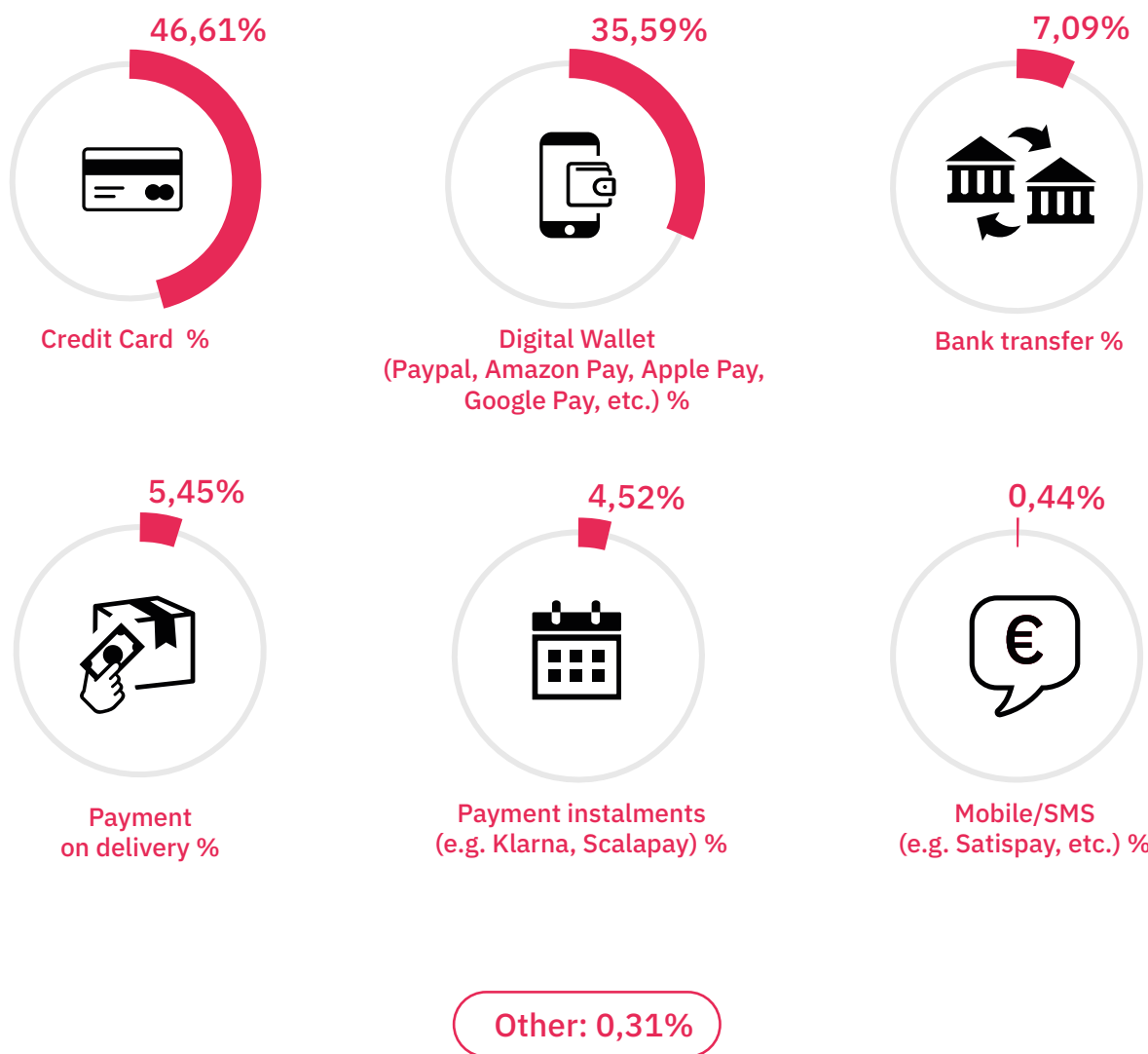
Digital Payments in Ecommerce

Once again this year for Italian Ecommerce companies, credit cards are the most popular means of payment (47%, up from last year), followed by digital wallets (36% - up almost two points from last year). In third place is the bank transfer (7%), followed by payment on delivery (5%, slightly down) and instalment systems (up from 5% last year to 4%).

→ Distribution of payment methods

What is the percentage distribution among the following payment methods? (Indicate the % value of your total online sales)

Graph source: Casaleggio Associati



29: Source: Retail Economics, Auctane, 2024.

The Ecommerce Manager

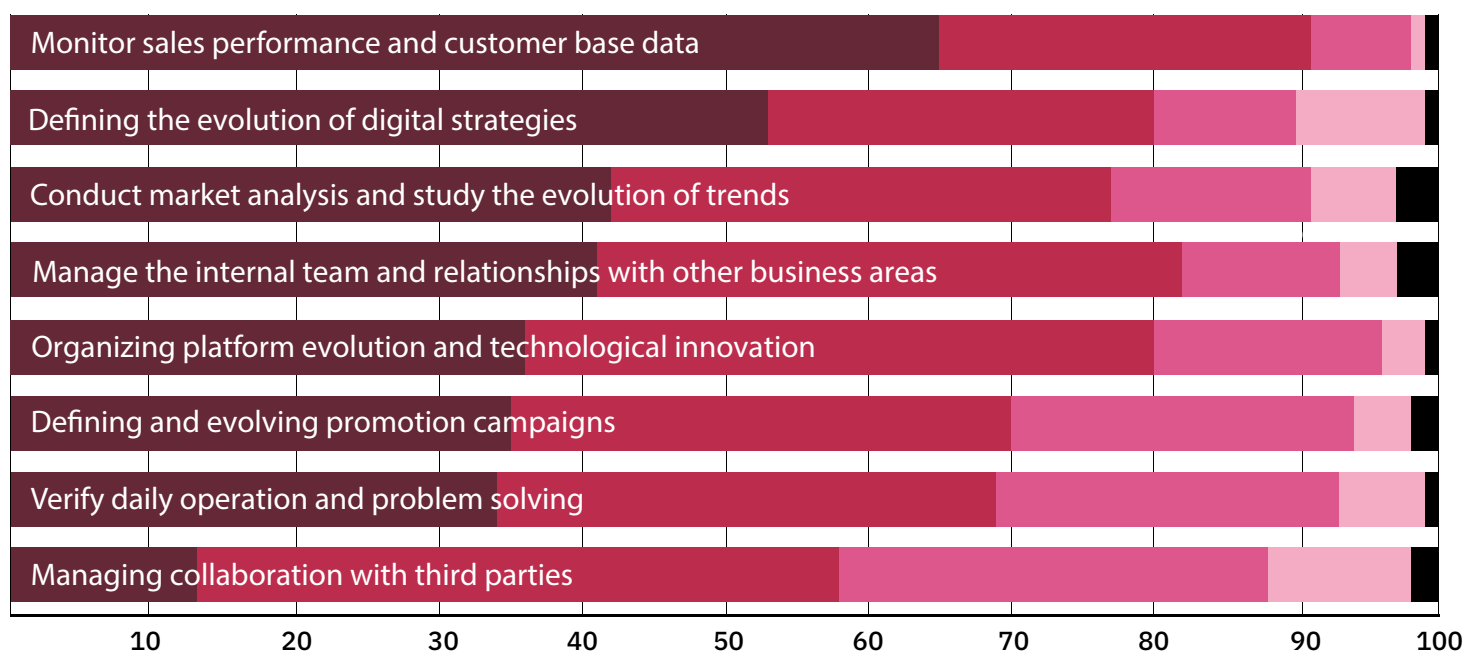
The main activities of the Ecommerce manager today are numerous, such as monitoring sales performance and data on the customer base (65% of Ecommerce managers consider this to be very important), defining the evolution of digital strategies (53%), carrying out market analyses and studying trends (42%), managing the internal team and relations with other areas of the company (41%), organising platform evolution and technological innovation (36%), defining and evolving promotion campaigns (35%), checking daily operations and problem solving (34%) and finally managing collaboration with third parties (13%).

→ The activities of the Ecommerce Manager

How relevant from 1 to 5 are the following activities in performing the role of Ecommerce manager? (Enter a value from 1 to 5 where 1 is unimportant and 5 is very important)

Graph source: Casaleggio Associati

● Very ● Somewhat ● Sufficient ● Slightly ● Not at all



The organisation of the Ecommerce teams of Italian companies varies considerably depending on the sector they belong to. According to data from the Annual Report 2023 (filed in 2024), the insurance sector clearly stands out with the largest team, with a median of 79 employees. This is followed at a distance by the Betting and Casino sector (17 employees), Marketplace (13 employees) and Travel and Tourism (12 employees). Pharmacies (11) and Fashion (10) occupy intermediate positions, while the sectors with leaner teams include Children and Toys, Jewellery and Watches (both with 5 employees), Cars and Motorcycles, Electronics and Leisure (all with 6). Overall, the median Ecommerce team in Italy consists of 8 people.

→ The Ecommerce Team

How many people does your ecommerce team consist of?

Graph source: Casaleggio Associati



Insurance

79



Gambling

17



Marketplace

13



Tourism

12



Pharmacies

11



Fashion

10



Publishing

9



Sport

8



Health and Beauty

8



Pets

8



Food and Beverage

7



Home and Furniture

7



Electronics

6



Leisure

6



Car and Motorcycles

6



Babies and Toys

5



Jewellery and Watches

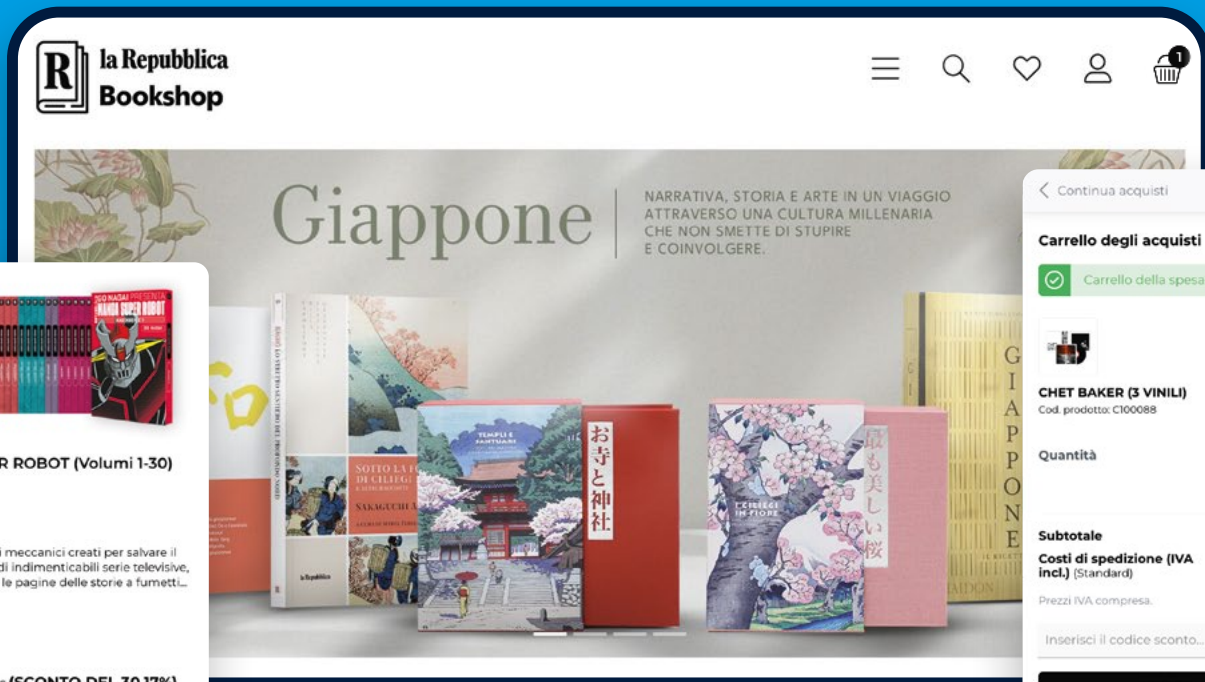
5

Organisations interviewed

We would also like to thank all the other companies that actively participated in the realisation of this study, in particular those listed below:

AgriEuro, Anocom, Aosom Italy, Araldi, Arcadia, Archiproducts, Arteni Spa, Ausilium, Babbi, Balato, Bauzaar, Bergzeit GMBH, Bernabei, Blass, Boehringer Ingelheim, Boiron, Bricodistribution, Caleffi, Calicantus, Callmewine, Camomilla Italia, Casa dello Sport, Cisalfa Group, ClioMakeUp, Coltelleria Collini, Cosesucose, Dado, Decidiprezzo, Design Factory, DF Sport Specialist, DHL eCommerce, Dike, Donkid, Doppelgänger, Dr. Max, Dyson, eDreams ODIGEO, Enspire, Erresse di Stefano Errani, Euronics, Evert, F.lli Campagnolo, Faba, Fabbri 1905, Fanatics, Farmacia Carli, Farmacia De Leo, Farmacia dei Passanti, Farmacia Di Bettolle, Farmacia Falco dei dottori Roberto e Pietro Monteleone, Farmacia Ferretti, Farmacia Longo, Farmacia Miliardi, Farmacie Comunali Riunite, Fedulloshop, FG Group, Gaesco, Generalimport, GF Retail, Gioielleria Caruso, Glee-commerce, Golmar Italia, Golook, Grada, Grub, Gruppo Italiano Vini, Gruppo Selex, GymBeam, Iaia, Imperial Spa, indigo.ai, ITA Airways, Japal, Kaufland, Kuvera, L-Nutra, La

Passione, La Redoute Italy, Laboratoire Native Italia, Lacertosus, Lentiamo, Leonardo Shoes, LG Electronics, Macrolibrarsi, Malianta, Mason's, MayerMoover, Microsoft, MilanOpenTour, Milo, Mondadori Retail, Multicedi, Nebulab, Nomination, OmniaRetail|Wheelup, OmnitekStore, Onlywood.it, OnShop, OVS, Parmaitaly-shop, Perdormire, personalsalus, Pharmalite, Phoenix Pharma Italia, Platum, Polifarma Benessere, Prenatal Retail Group, Prime Digital Solution, RBM Accessori Moto, Redcare, Reschimica, Ressa Servizi, Risaliti SRL, Risparmio Casa, Rivoldrink, Ronco srl, Rossini Group, Samsung, San Marco, Santacandida Italia, Sap Emerys, Securlab, Shopware, Sisal, Sorelle Ronco, Stefi Illuminazione, Stripe, StrumentiMusicali.net, Synthetic Lab, TicketOne, Top Retailers, Trenord, Trusted Shops, Trustpilot, TuttoFarma, U.G.A. Nutraceuticals, UHU Bostik, Ulysses Boutique, Uvanera, Verde!, Verti Assicurazioni, Viatris, Villa Massimo, Vinoso, Vip District, Vittorio Petrone, Vodafone, Wella Company, Wineshop.it, Wordlift, Zoocare.



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Top industry analysts, including Gartner, Forrester, and IDC, consistently recognize Shopware for delivering impactful solutions that prioritize efficiency and long-term success.

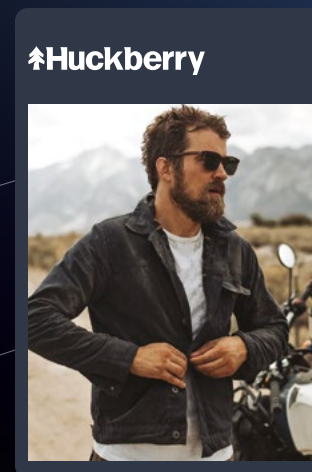
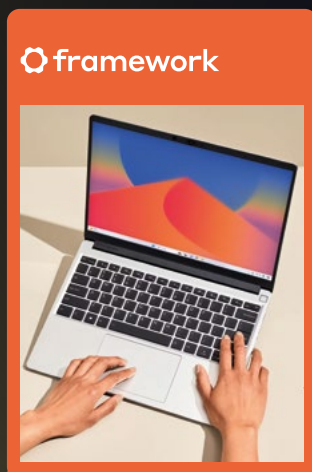
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- Personalization
- Unified Commerce
- Loyalty & Referrals
- AI-Driven Commerce

Design

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- Design System
- Accessibility
- Conversion Rate Optimization
- Design Audits

Development

- Shopify Plus
- Headless Commerce
- System Integration
- Replatforming
- Custom Apps

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Power to the Marketer

Today, marketing must be more than just a cost center, it must be a revenue center and a key driver for business growth.

63% of marketers spend a significant time on measurement and reporting. Marketers need consolidated solutions that empower them to do more with less.

The central image shows a woman in a blue long-sleeved shirt looking at a laptop. Overlaid on the scene are several digital marketing tools and analytics:

- Subject line generator:** A box with a plus sign and the text "Subject line generator".
- AI Segmentation:** A box with a plus sign, "AI Segmentation", and "Contacts whose cart value... is high". Below it, a message says "Join our loyalty program! and access our exclusive members sale".
- Mobile App Preview:** A smartphone displaying a "New Collection" of sneakers with a "SHOP NOW" button, a "May 1" sale tag, and "Latest product recommendations" for a "Sweatshirt" and "Sneakers".
- Revenue Chart:** A box showing "\$115k" in green, "Revenue from web recommendations", and a line graph showing an upward trend.
- Personalized Tokens:** A box with "Personalized Tokens" and "Latest product recommendations" for a "Sweatshirt" and "Sneakers".

Our industry-specific, outcome-driven, omnichannel customer engagement platform makes SAP Emarsys the platform of choice to take on these challenges for more than 1,500 companies around the world.

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- Measurable Results**
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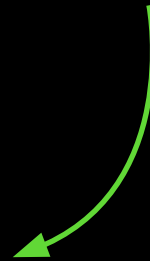


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