E-commerce in Russia 2020

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DATA insight

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Report structure

Key figures

0 / eGrocery in Russia, 2020

eGrocery includes all sales of online stores and food delivery services apart from the sales of food products via general-scope and multi-category online stores and marketplaces.

69 m
orders

RUB 1,880
average check

130
RUB bn
market size

+250%
growth in monetary terms (RUB)

Source: Data Insight, March 2021

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ePharma is the total sales of online pharmacies, including specialty online pharmacies, pharmaceutical delivery services, online sales and reservations of offline pharmacies. The sales of pharmaceutical products via non-pharmaceutical platforms, online stores and marketplaces are not included.

78 m
orders

RUB 1,679
average check

131
RUB bn
market size

+53%
growth in monetary terms (RUB)

Source: Data Insight, March 2021

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405 m
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RUB 1,780
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721
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Source: Data Insight, March 2021

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Other online stores represents the sales of all B2C players on the e-commerce market apart from the sales of food products via online stores and delivery services focused on medicines, food products and prepared meals, sales of online pharmacies, sales of major general-scope marketplaces, i.e. Wildberries, Ozon, Aliexpress Russia, Yandex.Market.

278 m
orders

RUB 6,205
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1725
RUB bn
market size

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growth in monetary terms (RUB)

Source: Data Insight, March 2021

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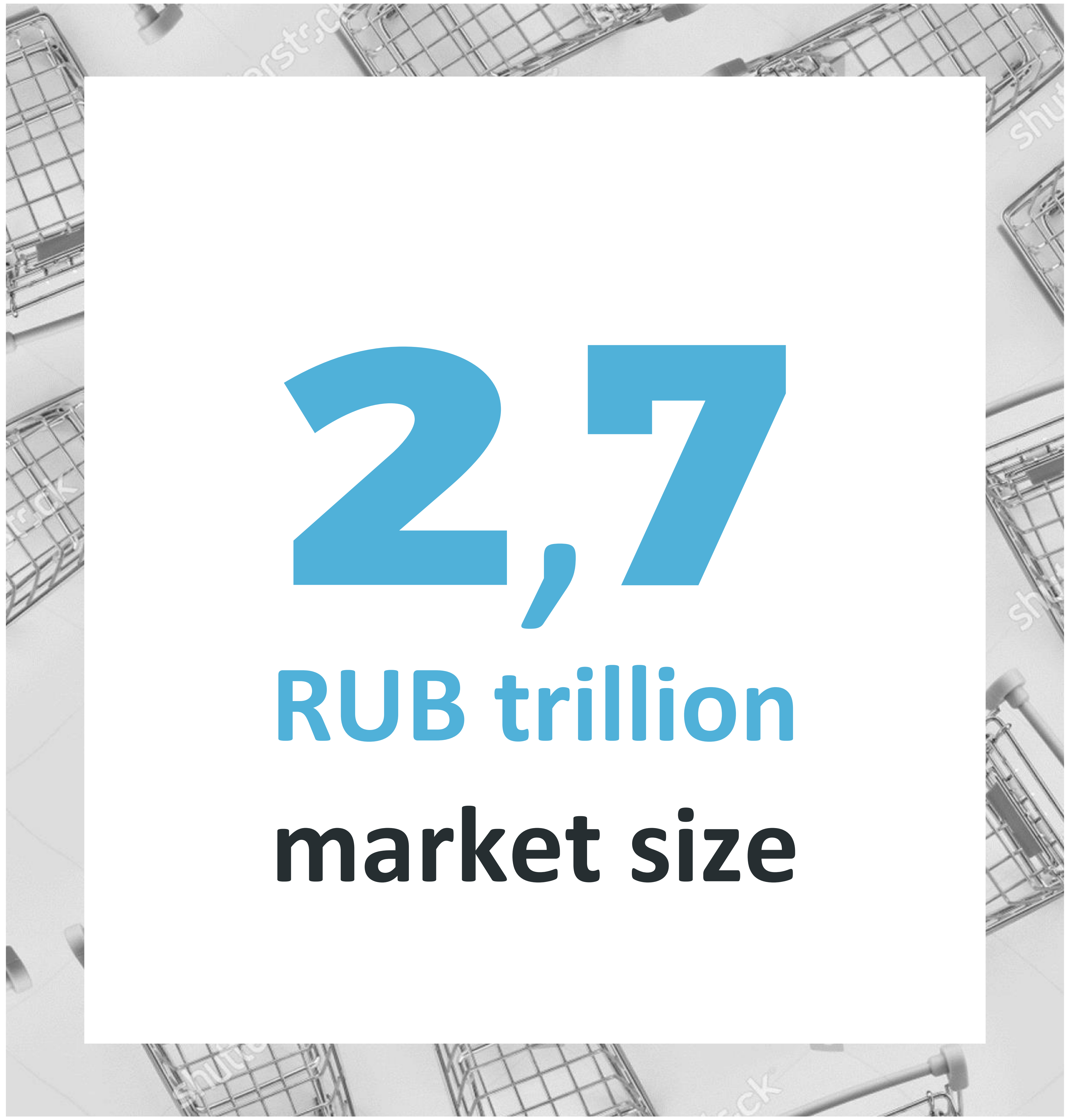

830 m
orders

RUB 3,260
average check

Estimates include the purchases of tangible goods in Russian online retail stores by individuals and do not include the purchases of travel and other services, prepared meals, public transport fares, tickets to events, digital/virtual products and cross-border purchases. The end price for the buyer is taken into account, including VAT and delivery cost

Source: Data Insight, March 2021

0 / Online C2C in Russia, 2020

C2C commerce is understood as the acquisition of new or used tangible goods, exclusive of motor vehicles and real estate, by individuals from other individuals over the Internet.

The number of sellers involved in C2C transactions was 13.2 million.

The number of buyers grew to 13.3 m. The number of purchases increased by 70% over the past 1.5 years.

301 m
sales

RUB 3,530
average check

1,0
RUB trillion
REVENUE

CAGR 2017-2020
53.2%

CAGR means compound annual growth rate for the period from 2017 to 2020.

Source: Data Insight in collaboration with Avito, C2C on the Russian Internet. E-commerce of Individuals, 2020 – https://datainsight.ru/DI_Avito_C2C_2020

Global e-commerce

- Key markets: country profiles
- Market comparison: the size and growth rate of the major markets, fastest growing markets, forecasts for 2020-24, e-commerce transactions per capita, the share of e-commerce in GDP

1 Key markets: country profiles

1,398
Population in 2019, m people

54%
Internet penetration 2019

China

$10,2
GDP per capita, 2019, '000

6.7%
E-commerce share in GDP, 2020F

$5 350
Household final consumption* in 2018, bn

USD 955
B2C e-commerce market in 2020F, bn

#26 Logistics Performance Index Rank, 2018

#31 Ease of Doing Business Index Rank, 2020

#42 The Inclusive Internet Index Rank, 2020

The Logistics Performance Index measures the efficiency of logistics and logistics infrastructure in various countries.

The Ease of Doing Business Index measures regulations and conditions affecting businesses in various countries.

The Inclusive Internet Index measures the Internet accessibility based on the local Internet infrastructure, prices, content, skills of the population and cultural factors.

* Households and non-profit institutions servicing households

Source: The World Bank, 2020; International Telecommunications Union (ITU), 2020; Statista, 2020

1 Key markets: country profiles

The USA

328
Population in 2019, m people

87%
Internet penetration 2019

USD 65.2
GDP per capita, 2019, '000

1.7%
E-commerce share in GDP, 2020F

USD 14,000
Household final consumption* in 2018, bn

USD 374
B2C e-commerce market in 2020F, bn

#14 Logistics Performance Index Rank, 2018
#6 Ease of Doing Business Index Rank, 2020
#3 The Inclusive Internet Index Rank, 2020

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Source: The World Bank, 2020; International Telecommunications Union (ITU), 2020; Statista, 2020

1 Key markets: country profiles

67
Population in 2019, m people

95%
Internet penetration 2019

The UK

USD 42.3
GDP per capita, 2019, '000

4.7%
E-commerce share in GDP, 2020F

$1,200
Household final consumption* in 2019, bn

USD 133
B2C e-commerce market in 2020F, bn

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#8 Ease of Doing Business Index Rank, 2020

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Source: The World Bank, 2020; International Telecommunications Union (ITU), 2020; Statista, 2020

1 Key markets: country profiles

83
Population in 2019, m people

88%
Internet penetration 2019

#1 Logistics Performance Index Rank, 2018
#22 Ease of Doing Business Index Rank, 2020
#18 The Inclusive Internet Index Rank, 2020

Germany

USD 46.3
GDP per capita, 2019, '000

2.4%
E-commerce share in GDP, 2020F

$2,100
Household final consumption* in 2018, bn

USD 92
B2C e-commerce market in 2020F, bn

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Source: The World Bank, 2020; International Telecommunications Union (ITU), 2020; Statista, 2020

DATA insight

1 Key markets: country profiles

1,366
Population in 2019, m people

34%
Internet penetration 2019

India

USD 2.1
GDP per capita, 2019, '000

1.5%
E-commerce share in GDP, 2020F

$1,200
Household final consumption* in 2019, bn

USD 44
B2C e-commerce market in 2020F, bn

#44 Logistics Performance Index Rank, 2018

#63 Ease of Doing Business Index Rank, 2020

#46 The Inclusive Internet Index Rank, 2020

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Source: The World Bank, 2020; International Telecommunications Union (ITU), 2020; Statista, 2020

1 Key markets: country profiles

144
Population in 2019, m people

81%
Internet penetration 2019

Russia

USD 11.6
GDP per capita, 2019, '000

2.5%
E-commerce share in GDP, 2019**

USD 850
Household final consumption* in 2019, bn

USD 37.4**
B2C e-commerce market in 2019, USD bn**

#75 Logistics Performance Index Rank, 2018
#28 Ease of Doing Business Index Rank, 2020
#26 The Inclusive Internet Index Rank, 2020

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** Data Insight estimates B2C e-commerce market size estimate includes the incoming cross-border purchases
Source: The World Bank, 2020; International Telecommunication Union (ITU), 2020; Ecommerce Foundation, country profiles, 2020; Data Insight, 2020

1 Key markets: country profiles

211
Population in 2019, m people

67%
Internet penetration 2019

Brazil

USD 8.7
GDP per capita, 2019, '000

1.0%
E-commerce share in GDP, 2020F

$1,200
Household final consumption* in 2019, bn

USD 18
B2C e-commerce market in 2020F, bn

#56 Logistics Performance Index Rank, 2018

#124 Ease of Doing Business Index Rank, 2020

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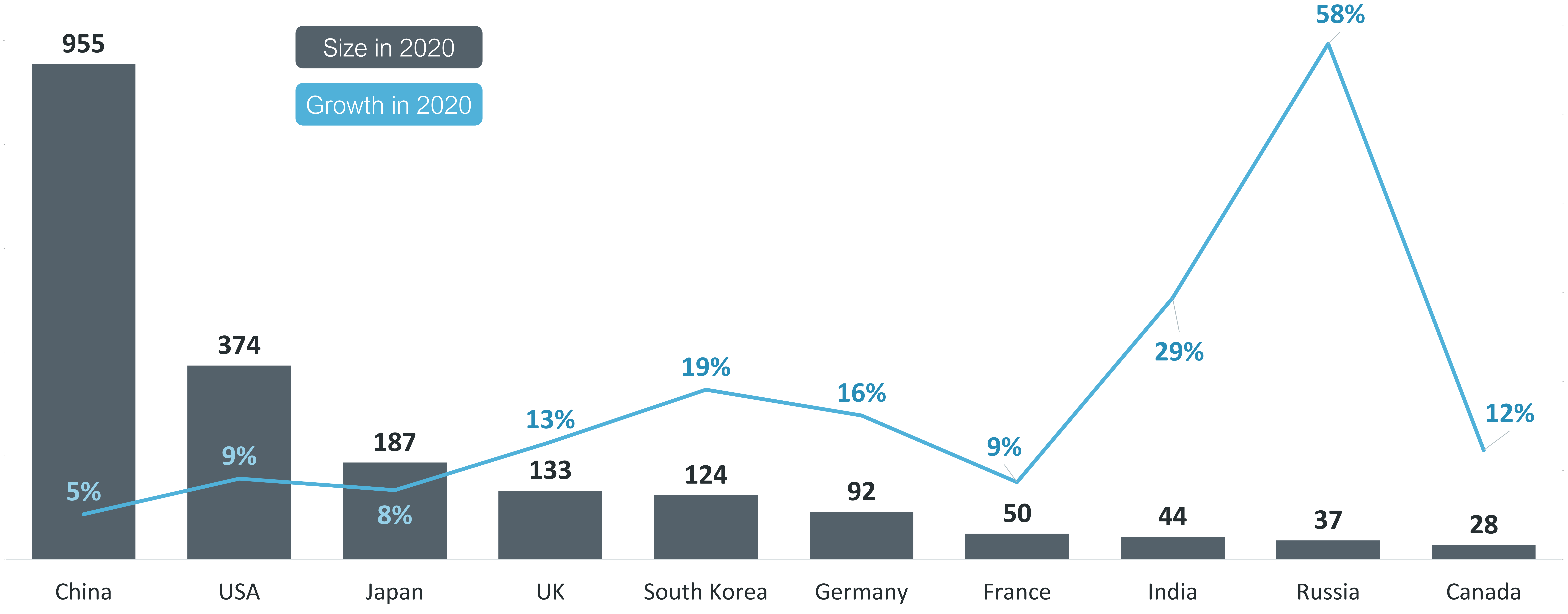
Source: The World Bank, 2020; International Telecommunications Union (ITU), 2020; Statista, 2020

1 Market comparison: major markets

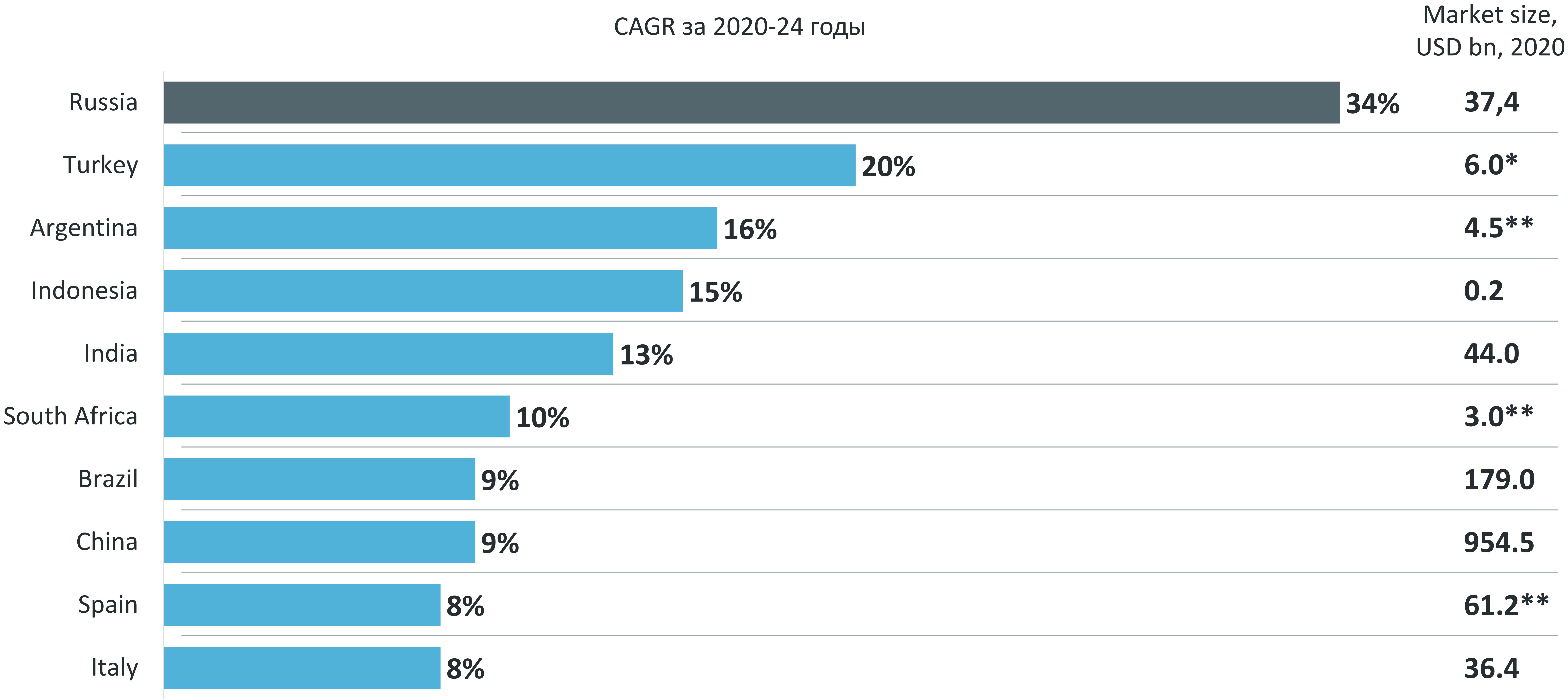
E-commerce market size and growth in 2020 (forecast), USD bn



Sources: Statista, 2020; Data Insight, March 2021 (for the Russian market)

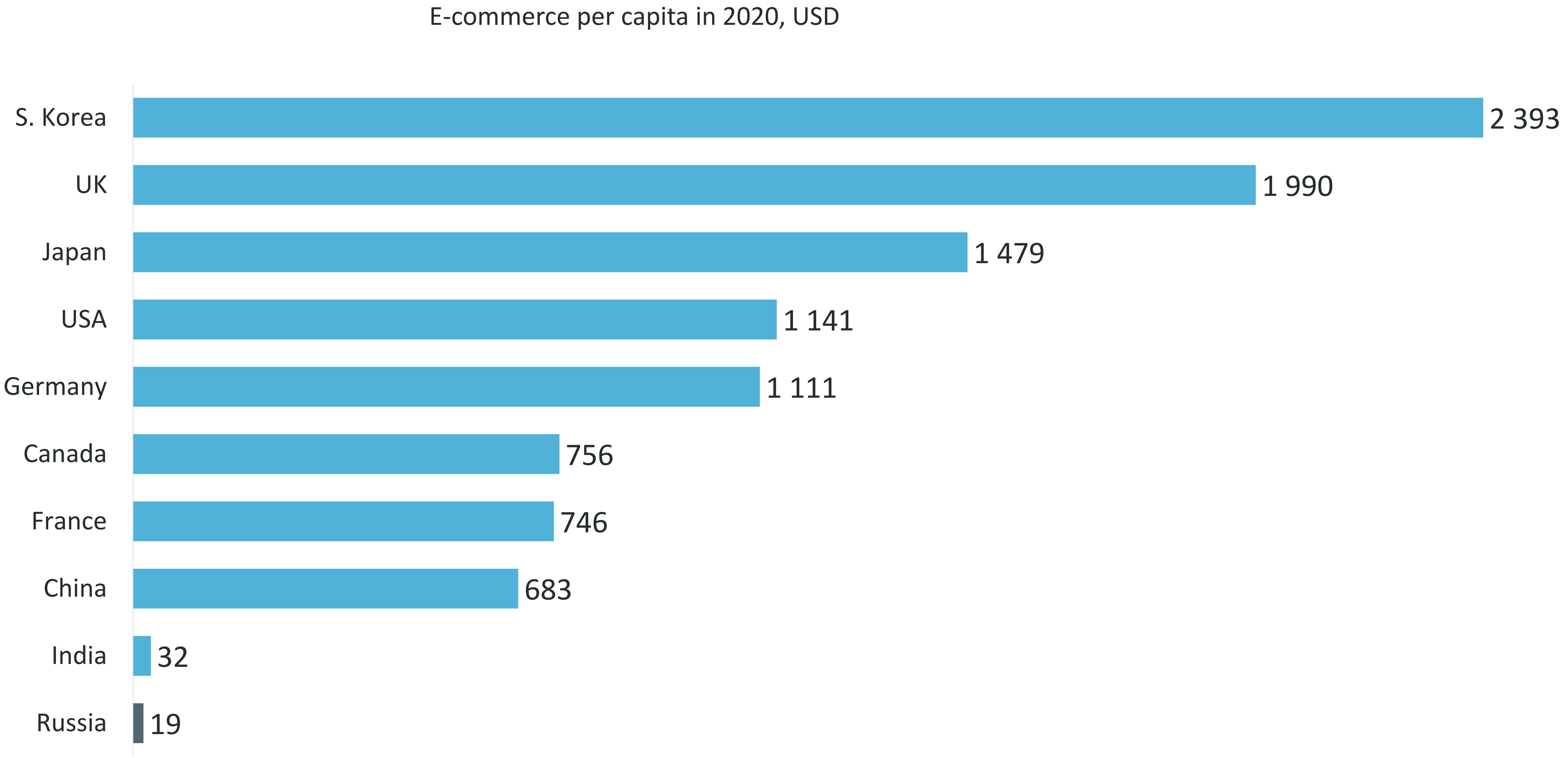
DATA insight

1 Market comparison:
fastest growing markets in 2020-24



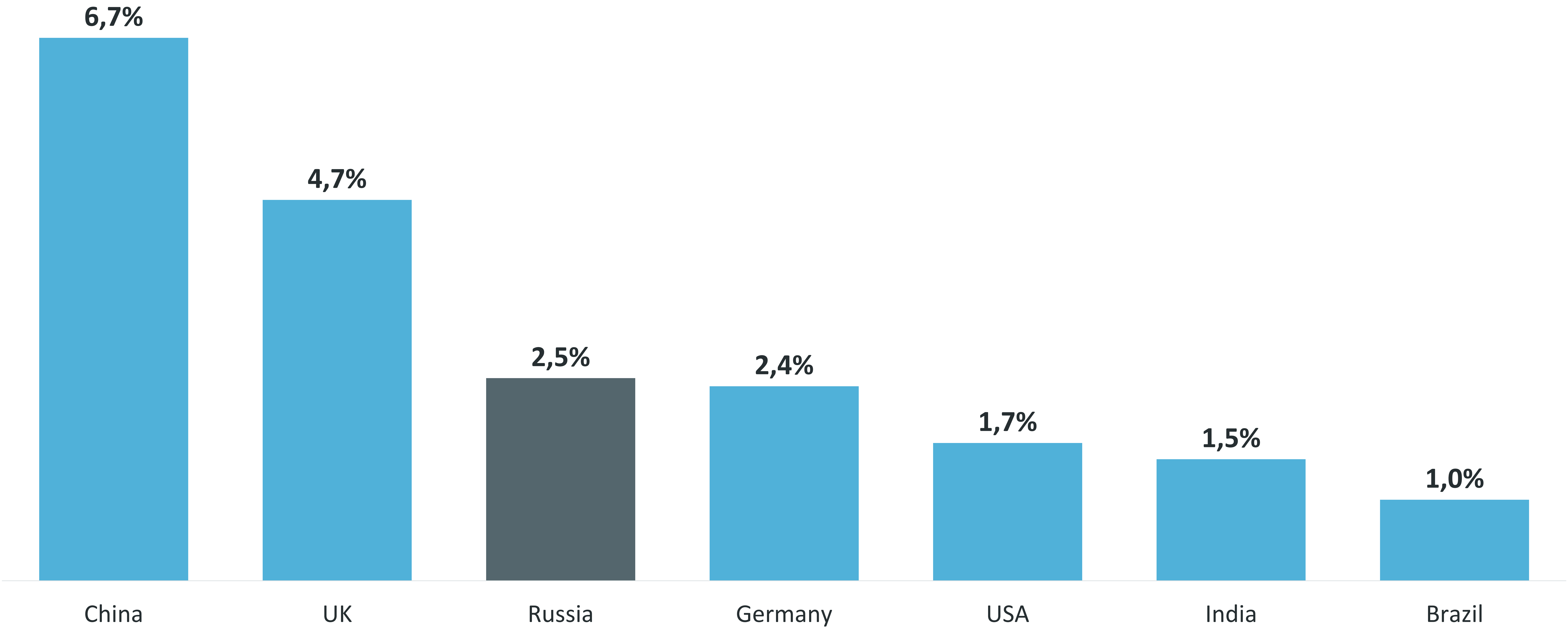
Source: Statista, 2020; Data Insight, March 2021F (for the size and growth rate of the Russian market)
*in 2018
**in 2019
Growth forecast is regardless of FX differences

1 Market comparison: online vs population



Source: Statista, 2020; World Bank, 2020; Data Insight, 2021

1 Market comparison: share of B2C e-commerce in GDP

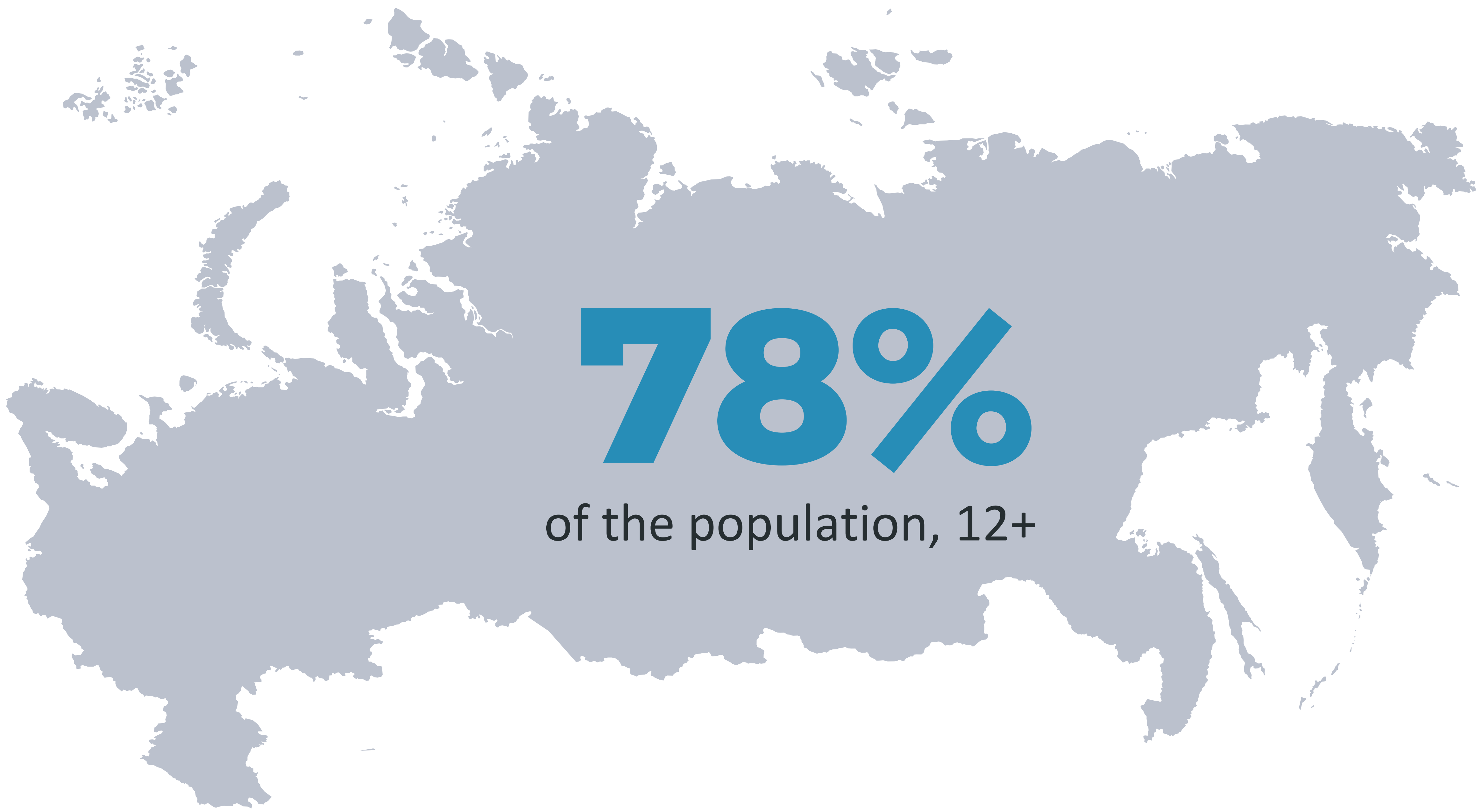


Source: The World Bank, 2020; Statista, 2020, 2019; Data Insight, 2021

Online audience in Russia

- Size and preferences of Russia's online audience
- User age and preferred devices
- Average time online per user

2 Size and preferences of Russia's online audience

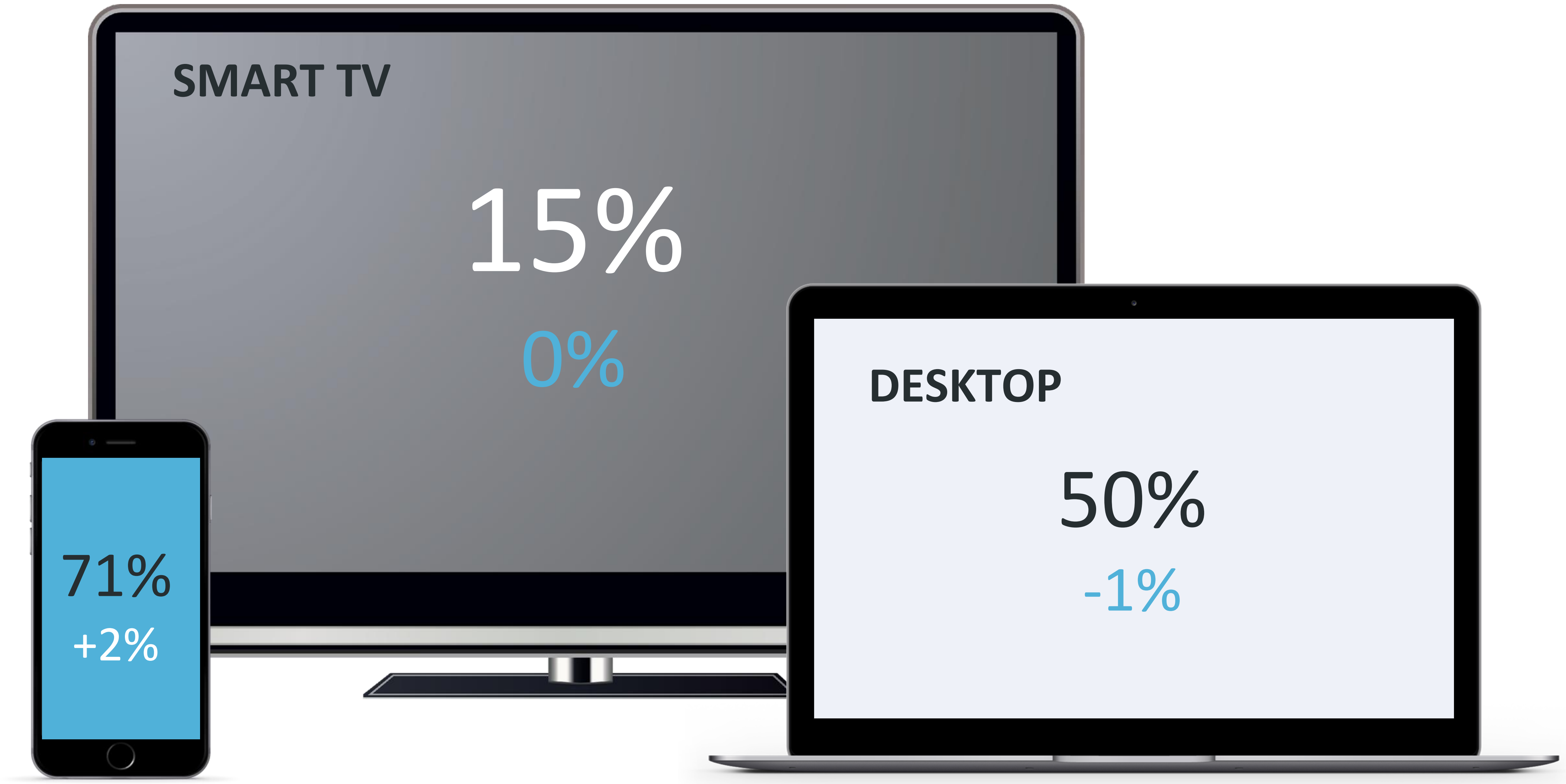


91% go online every day

Monthly online audience

95.5 m PEOPLE

0% (per year)



Russia 0+, Monthly reach, all aged 12+, percentage of population, July 2020 –September 2020, increment in July 2020 – September 2020 vs April 2019 – September 2019
Source: Mediascope, The Internet Audience, 2020

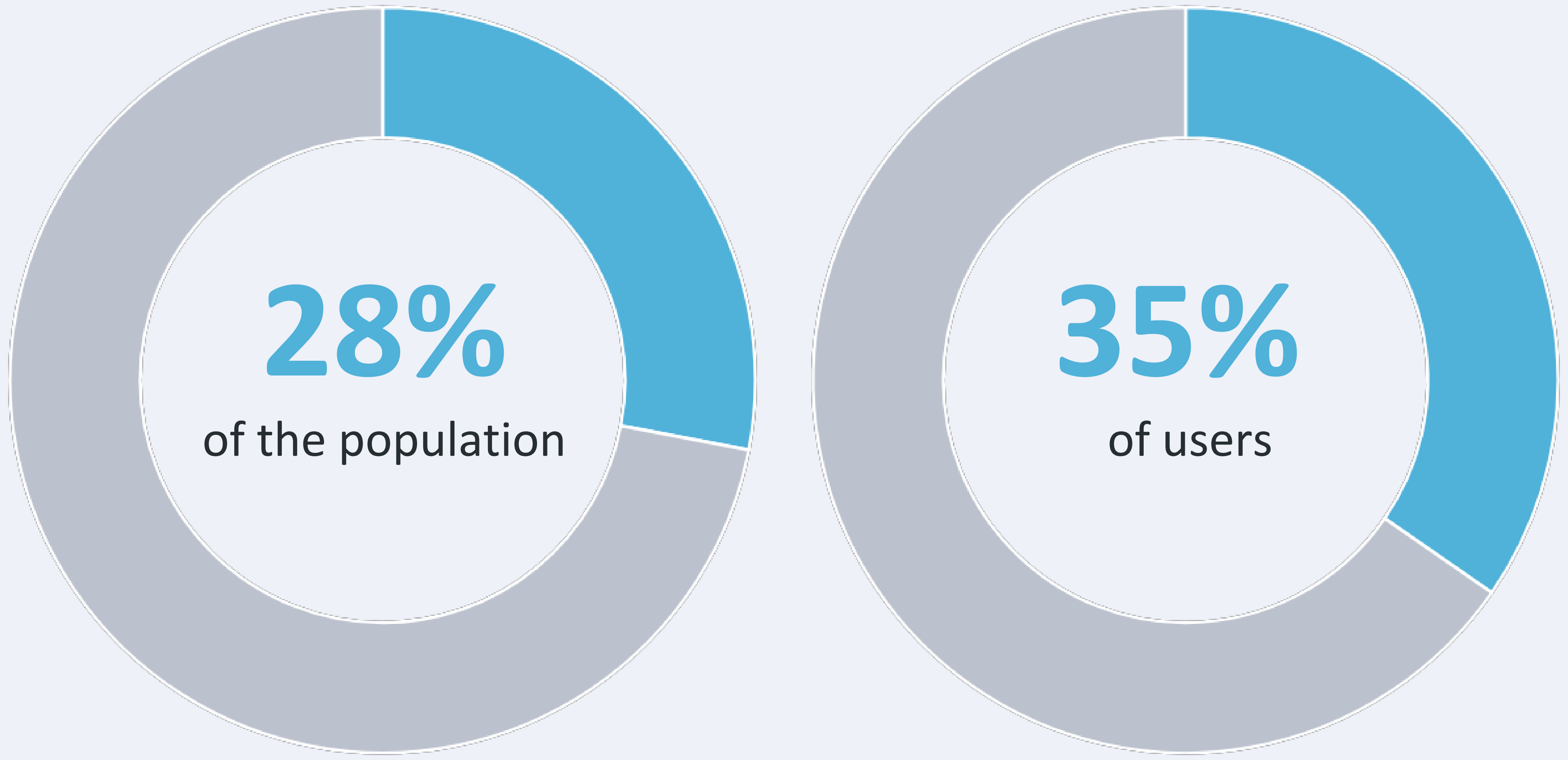
DATA insight

2 Size and preferences of Russia's online audience

MOBILE EXCLUSIVE

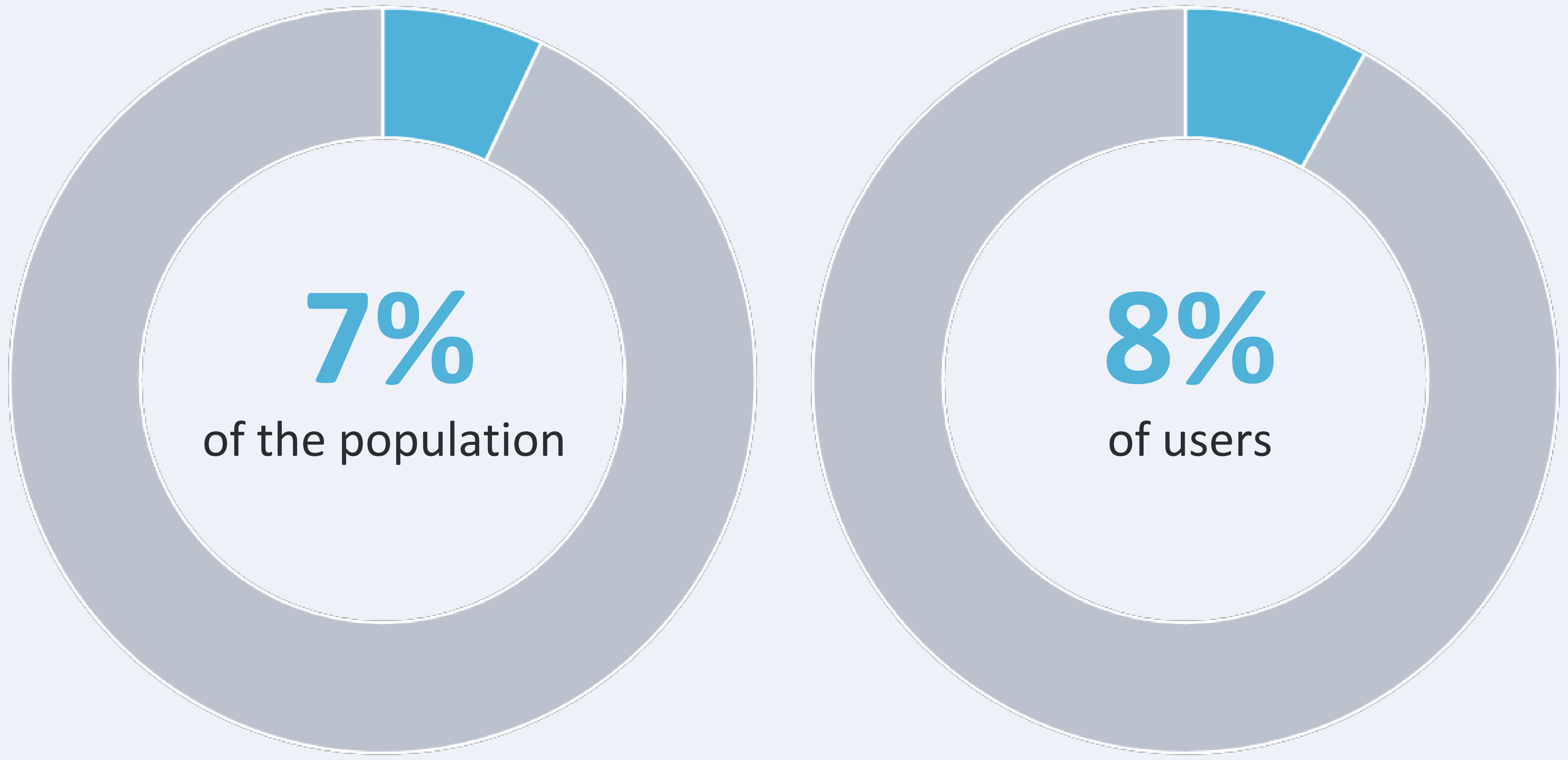
VS

DESKTOP EXCLUSIVE



33.9 M PEOPLE

+3% (per year)



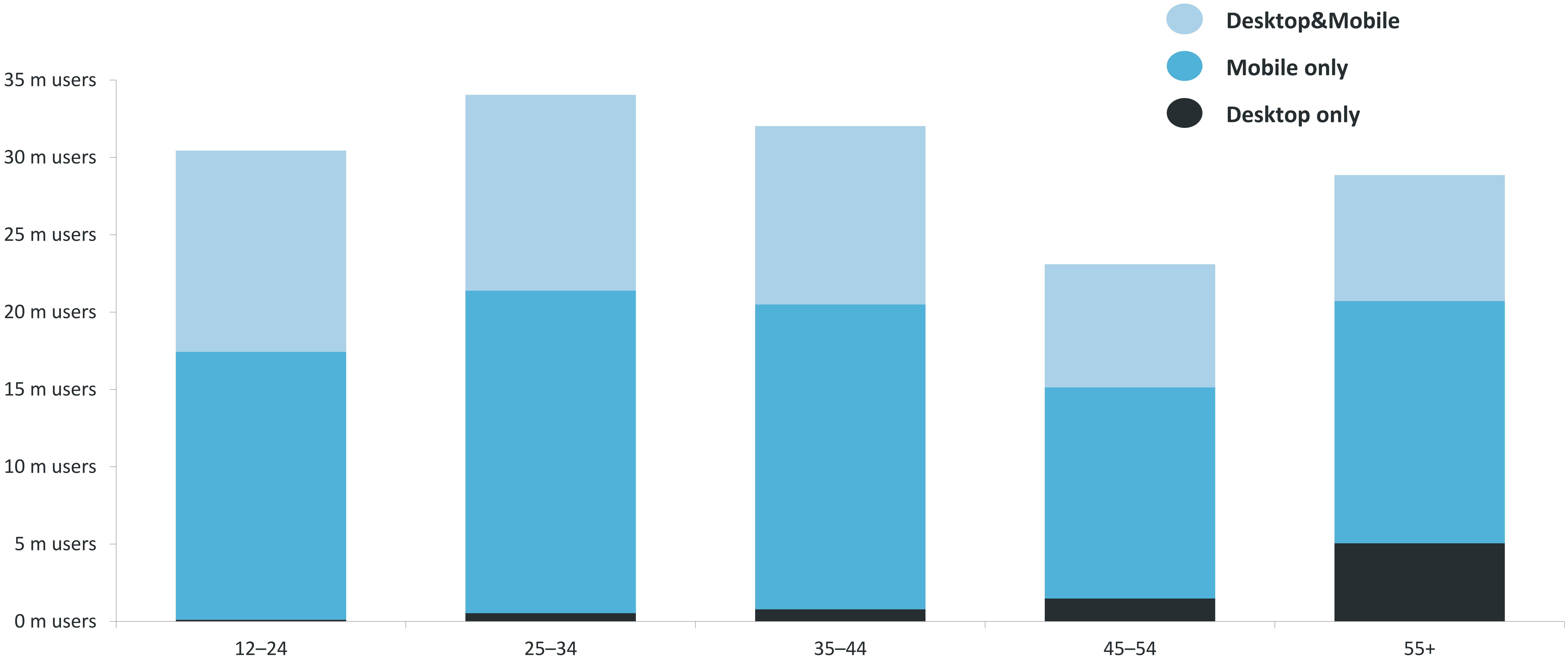
8.0 M PEOPLE

- 25% (per year)

Russia 0+, Monthly reach, all aged 12+, percentage of population, June 2020 –September 2020, increment in June 2020 – September 2020 vs April 2019 – September 2019

Source: Mediascope, The Internet Audience, 2020

2 User age and preferred devices



Russia 0+, Monthly reach, aged 12+, July –September 2020
Source: Mediascope, WEB-Index, 2020

2 Average time online per user per day

Russia 100k+, aged 12-64, average minutes per day online, September 2020
Source: Mediascope, The Internet Audience, 2020

B2C market in Russia

- Online B2C in Russia, 2020
- Online sales in Russia, 2011-2020
- Market structure, recorded sales and number of orders
- Growth structure in 2020
- Orders` growth
- Average check in 2015–2020
- Share of e-commerce on the retail market

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orders

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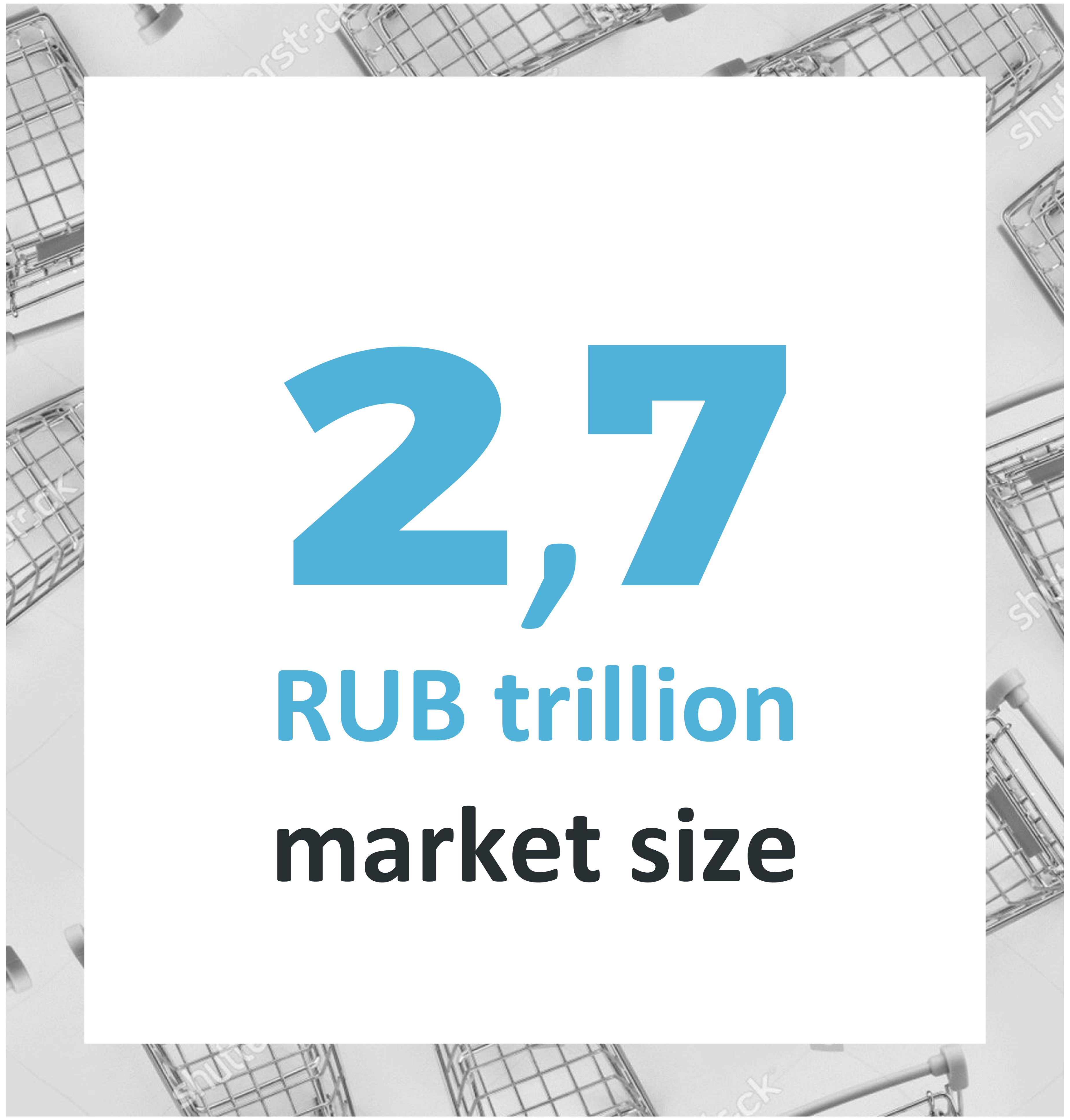
average check



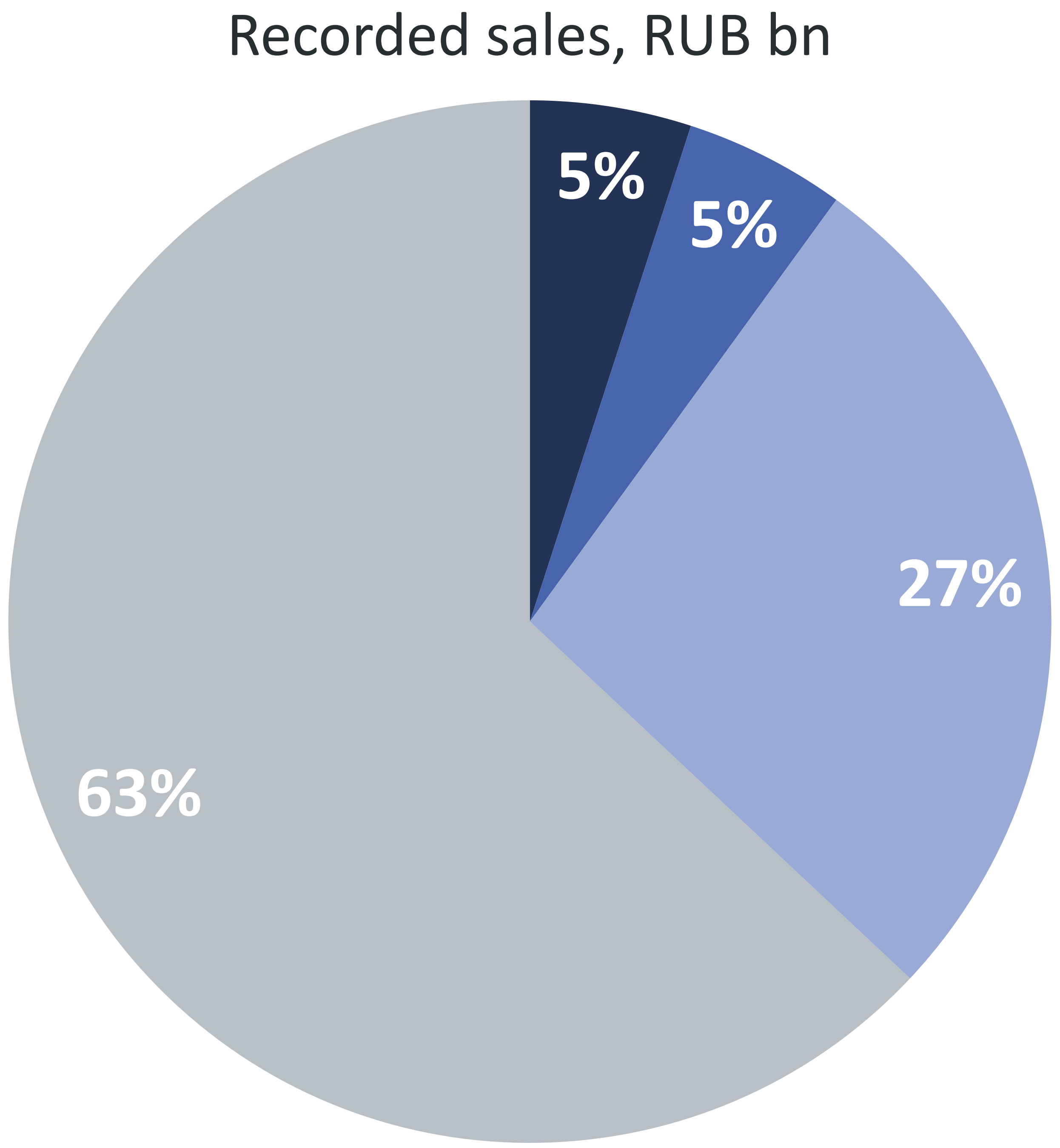
2,7
RUB trillion
market size

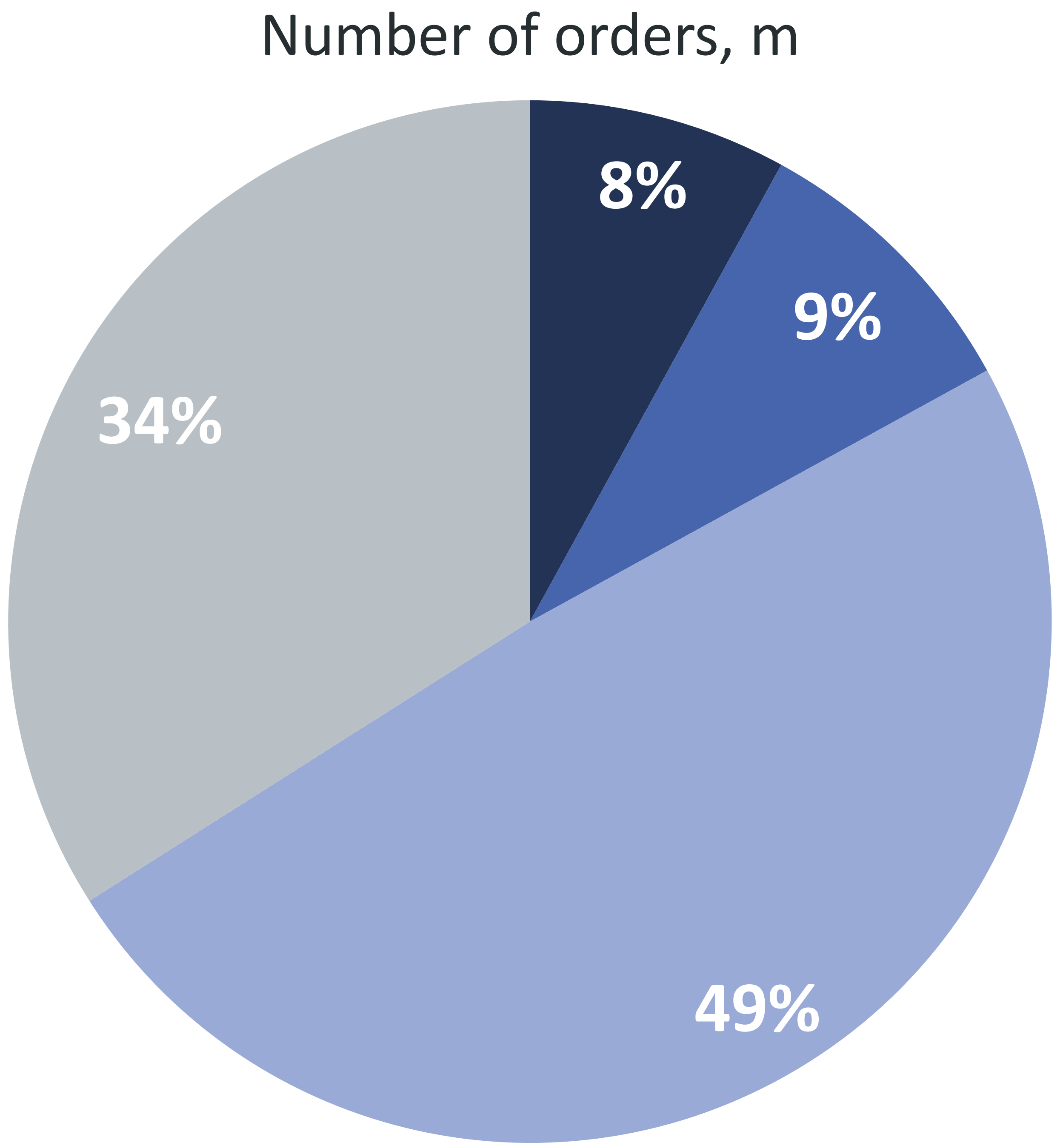
Estimates include the purchases of tangible goods in Russian online retail stores by individuals and do not include the purchases of travel and other services, prepared meals, public transport fares, tickets to events, digital/virtual products and cross-border purchases. The end price for the buyer is taken into account, including VAT and delivery cost

Source: Data Insight, March 2021

3 Market structure, recorded sales and number of orders

In 2020, new segments were added to the B2C market, which were not researched separately in the previous years: eGrocery, ePharma, major general-scope marketplaces.





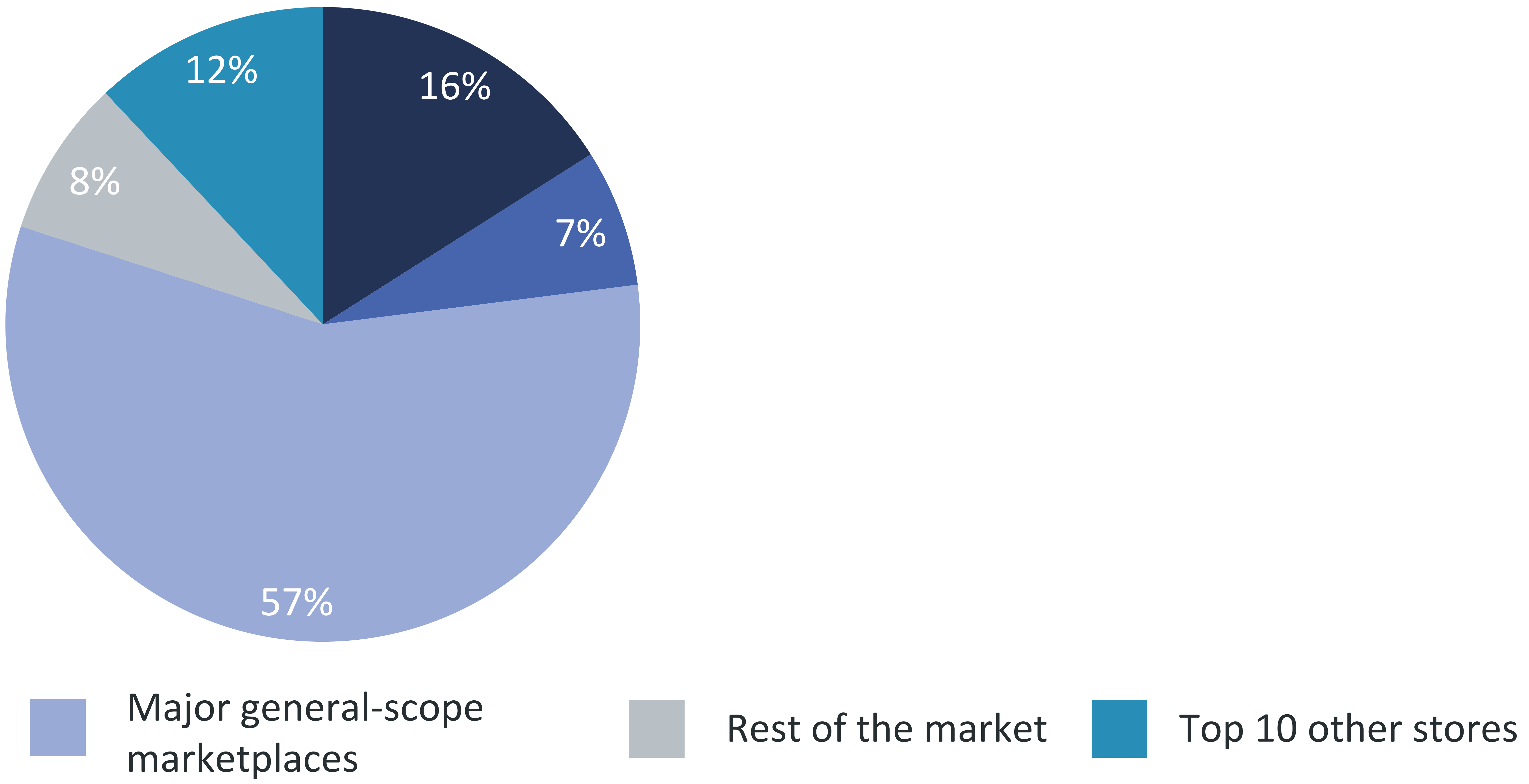
eGrocery ePharma Major general-scope marketplaces Rest of the market

Source: Data Insight, March 2021

3 Growth structure in 2020

In 2020, the **number of completed orders increased by 365 million**. The largest growth of 57% was observed in the major general-scope marketplaces segment.

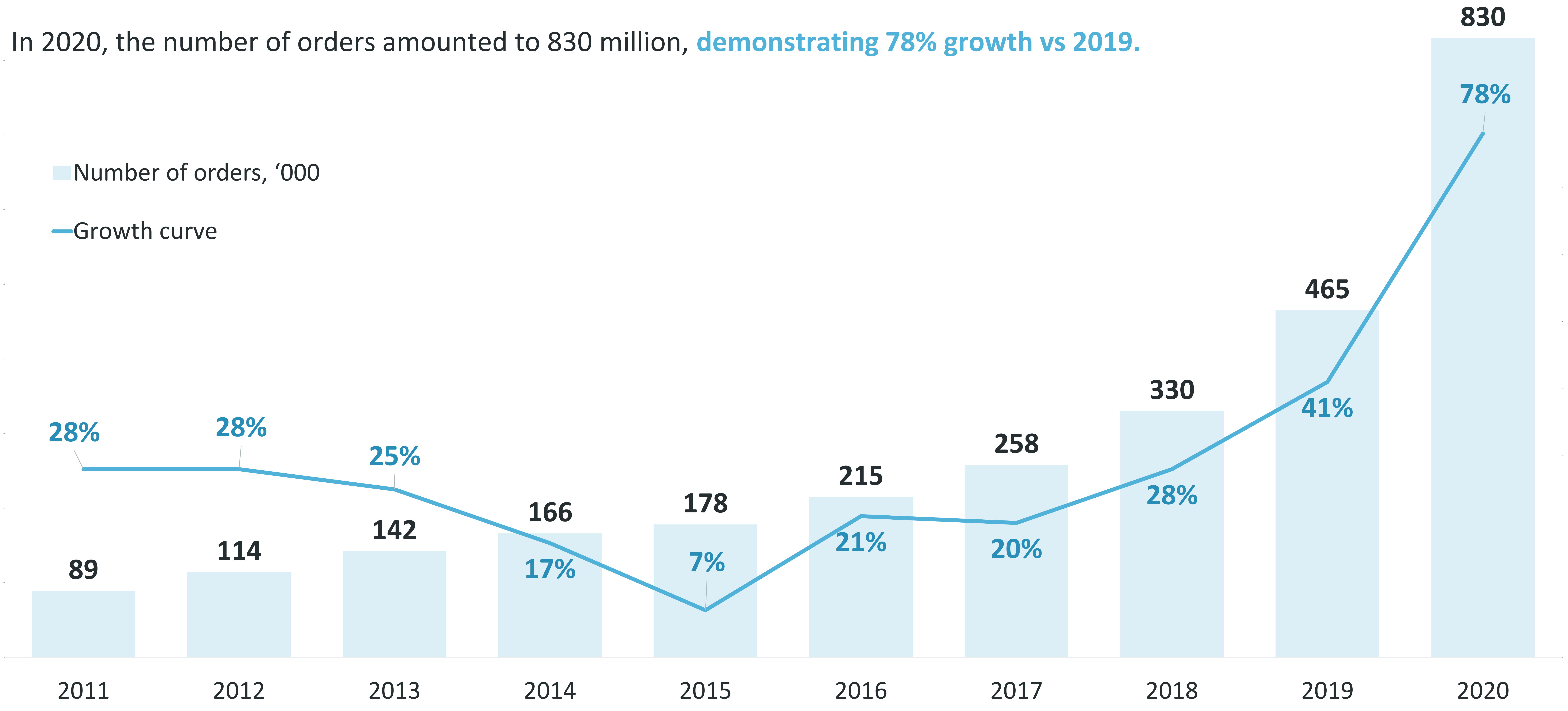
Growth structure, 2020



Source: Data Insight, March 2021

3 Changes in the number of orders, 2011-20

In 2020, the number of orders amounted to 830 million, **demonstrating 78% growth vs 2019.**



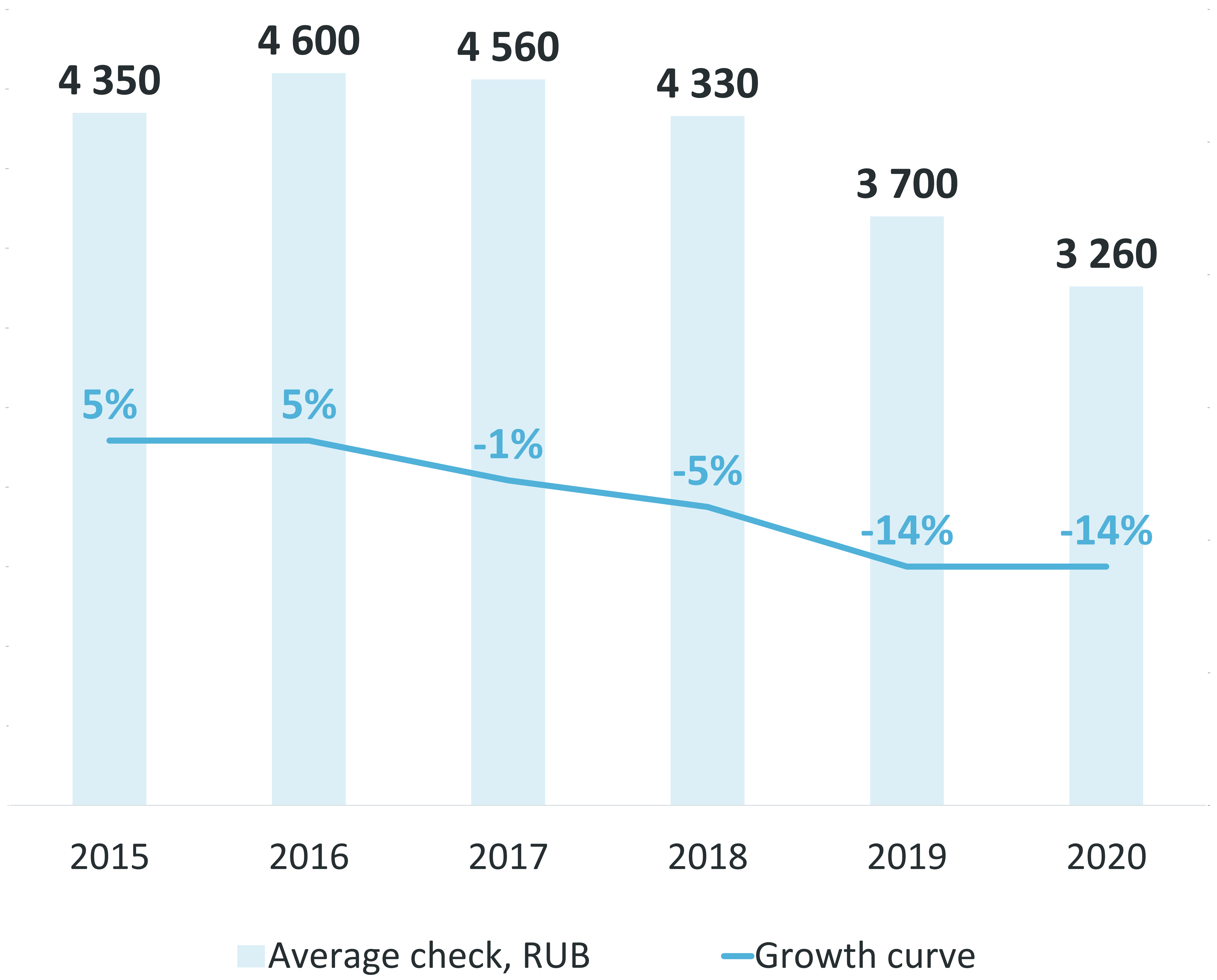
Source: Data Insight, March 2021

3 Changes in the average check amount, 2015-20

In 2020, the **average check amount decreased by 14%**.

Key drivers:

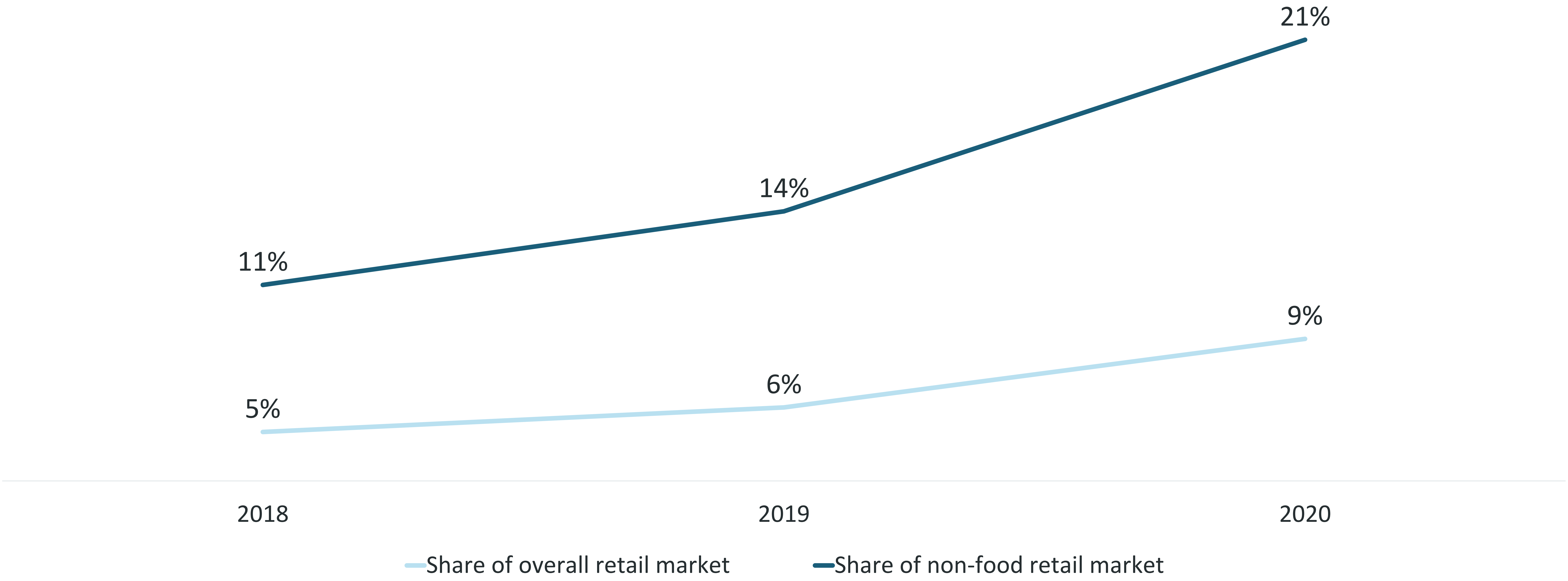
- online shopping becomes a daily routine;
- growing availability of free or cheap delivery;
- outstripping growth of general-scope marketplaces with a low average check;
- outstripping growth of segments with a low average check (online pharmacies, localized food delivery services).



Source: Data Insight, March 2021

3 Share of e-commerce on the retail market

The share of e-commerce is growing: in 2020, it accounted for **9%** of the overall retail market and **21%** of the non-food retail market.



Retail turnover in Russia for the year excluding car and fuel sales.

Source: Data Insight, March 2021

Impact of the pandemic

- Changes in preferred delivery options in 2020H1 vs 2019
- Impact of the pandemic on delivery channels, 2020H1
- The value of delivery in the restaurant business
- Impact of the pandemic on small businesses

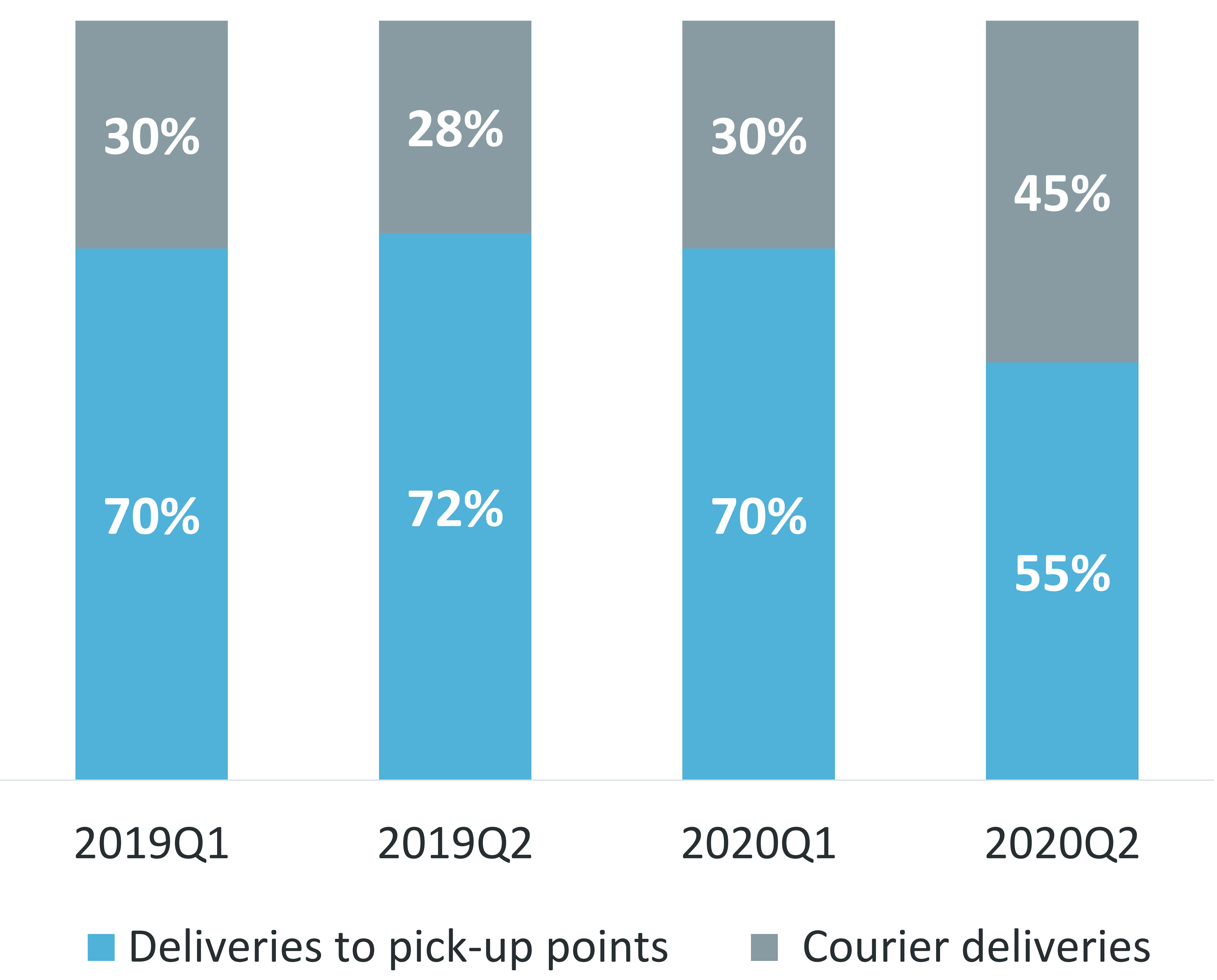
Changes in preferred delivery options: 2020H1 vs 2019

The share of orders with courier delivery in the first half of 2020 exceeds the share of such orders in 2019 by approximately **9%**.

On average, **71%** of orders made in the first half of 2019 included courier delivery and **29%** were shipped to pick-up points.

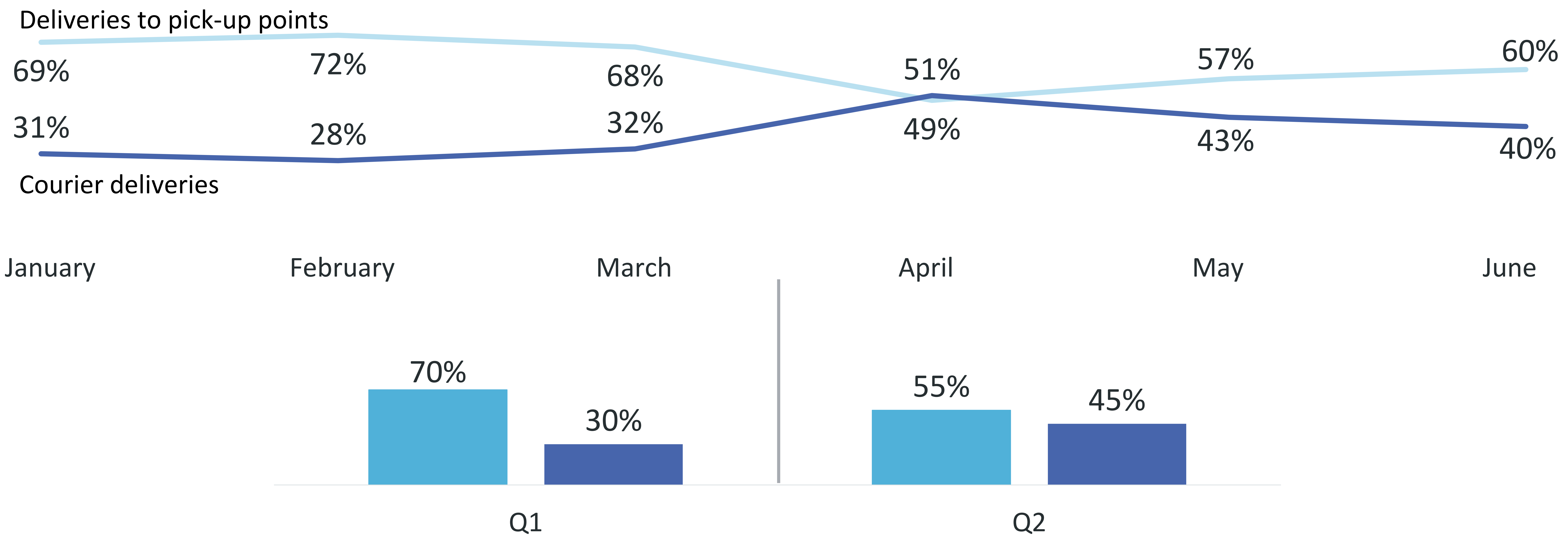
The figures in 2020 Q1 show no significant variance from those in 2019 Q1.
In the second quarter of 2020, the share of orders shipped to pick-up points increased significantly, i.e. by **15%** compared to the first quarter. Despite a more even distribution of orders by delivery methods this year, courier delivery remained the most popular option (**55%** of all orders).

Seasonality of delivery options: 2019H1 vs 2020H1



4 Impact of the pandemic on delivery channels

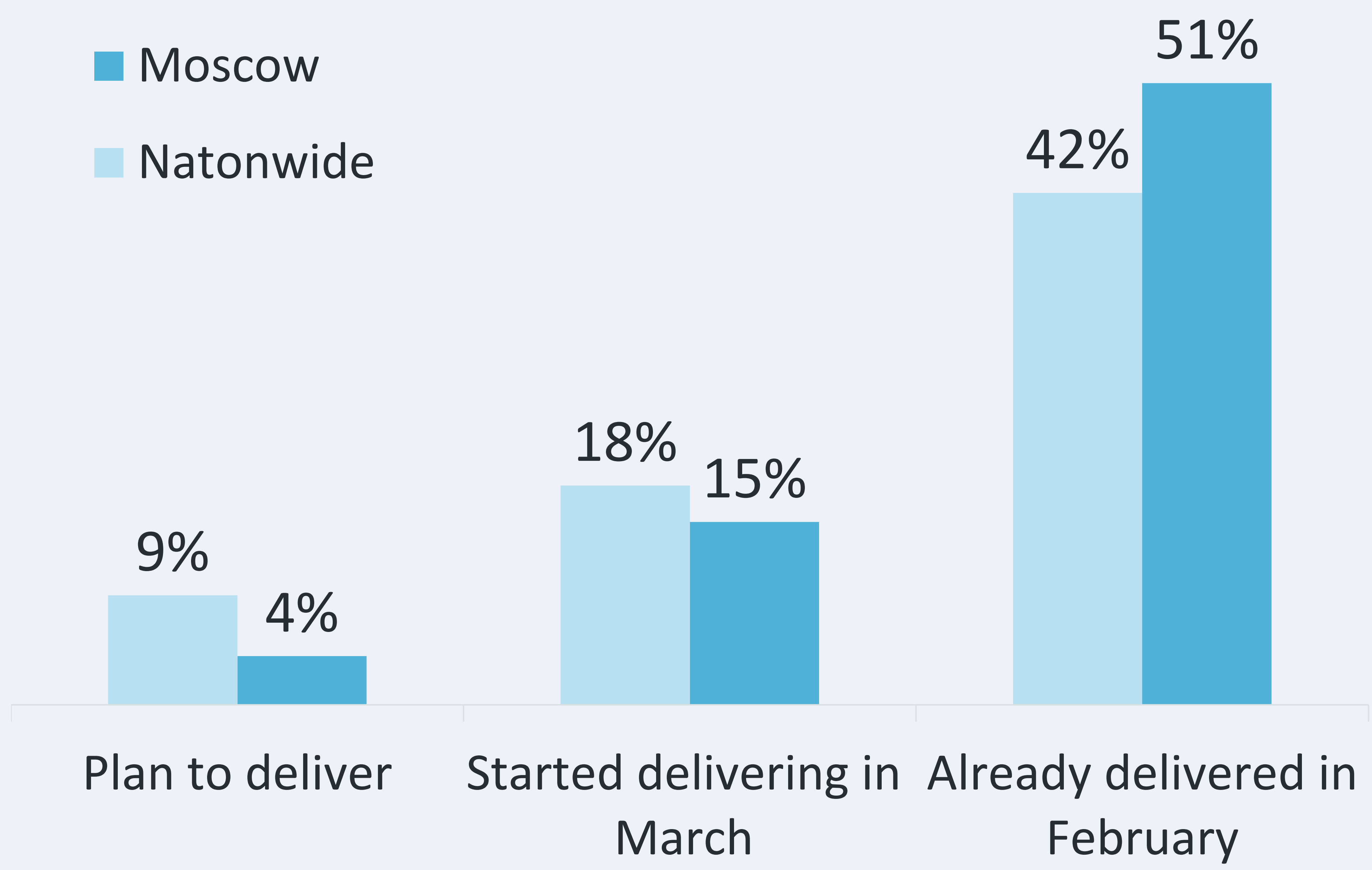
In the first quarter of 2020, deliveries to pick-up points and to the courier deliveries were at the level of 2019. However, as the self-isolation policy was enforced in April 2020, the share of home deliveries exceeded the share of shipments to pick-up points.



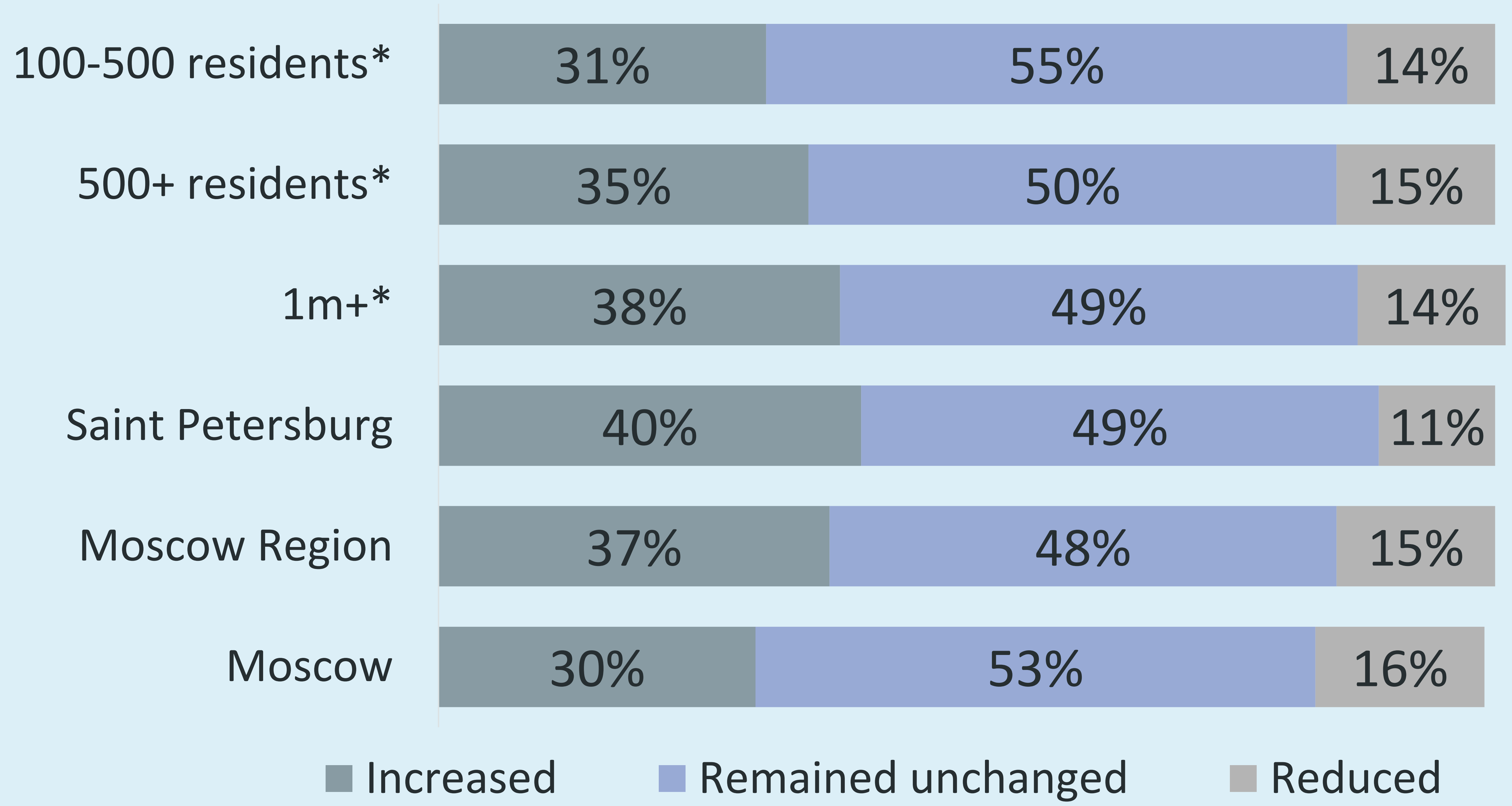
4 The value of delivery in the restaurant business: transition beginning in March 2020

At the beginning of the mandatory self-isolation period, restaurants rushed to organize deliveries: **18%** of the surveyed restaurateurs implemented delivery in March and **almost every tenth establishment planned to implement it in the near future. The share of delivered orders is increasing**, according to more than a third of the survey participants.

Percentage of all restaurants



Share of orders delivered last year… (% of restaurants)



*100-500 stands for cities with 100k–500k residents; 500+ stands for cities with 500k–1 m residents;
1mln+ stands for cities 1 million+ residents.

Source: Data Insight in collaboration with Delivery Club, The value of delivery in the restaurant business, 2020 : https://www.datainsight.ru/Delivery_2020

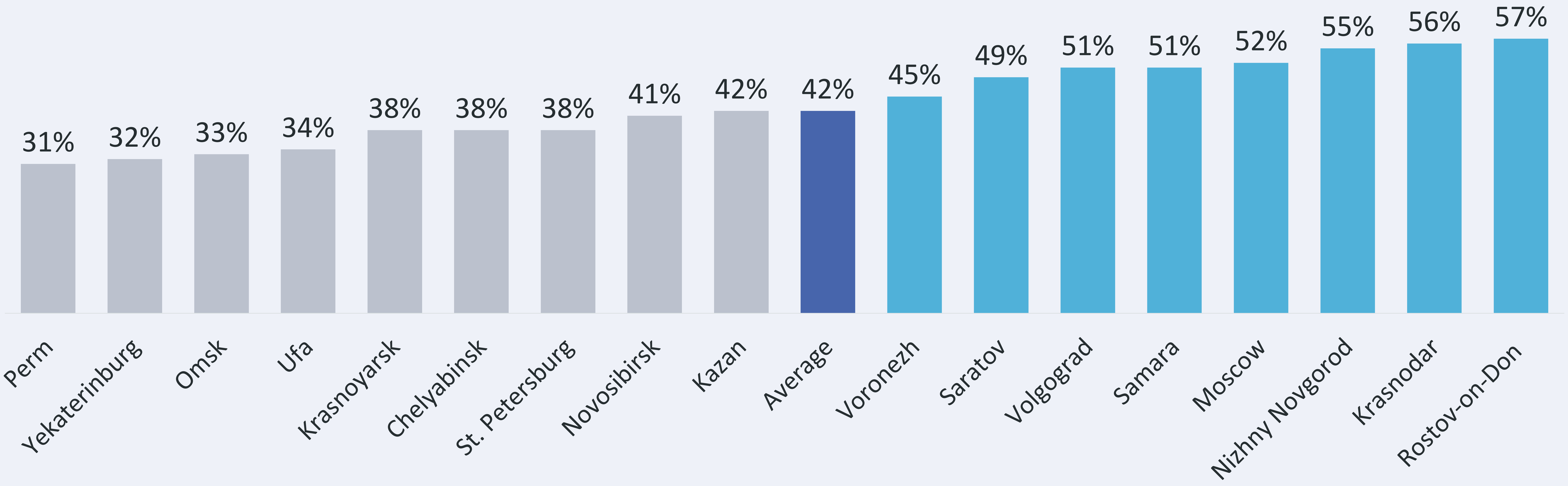
Delivery Club DATA insight

The value of delivery in the restaurant business: top cities and growth areas

The highest share of restaurants offering delivery was recorded in Rostov-on-Don (57%) and Krasnodar (56%).

Moscow and Moscow Region towns came third with a delivery utilization rate of 52% and 53%, respectively.

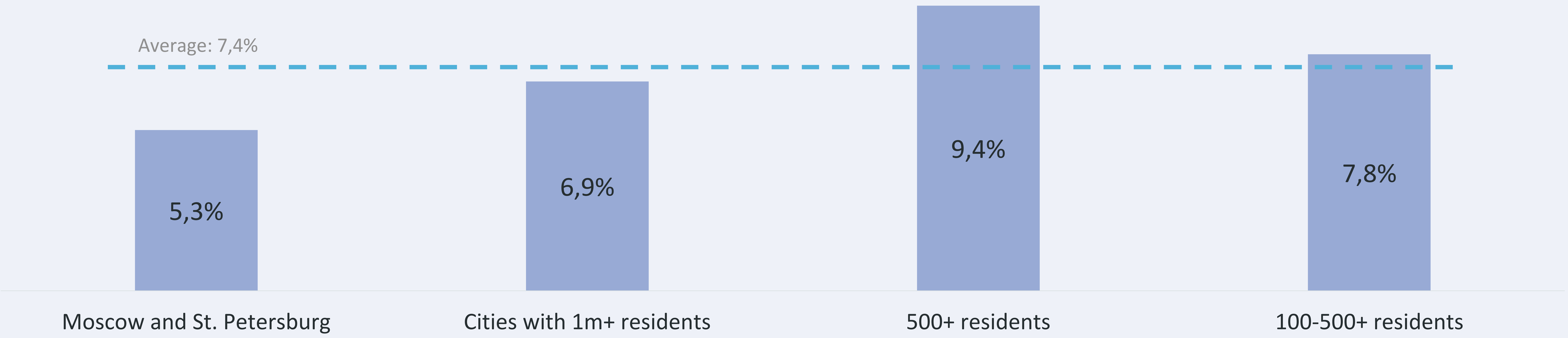
Share of restaurants offering delivery by city in March 2020



The value of delivery in the restaurant business: dark kitchen

The proportion of restaurants using dark kitchen is higher in medium-sized (500k+ residents) cities than in 1million+ cities and small towns. The determining factor is consumer habits. Residents of 500k+ cities are more likely to order food delivered to their home rather than go out for a meal than those of 1m+ cities. Residents of small towns often cook at home. Besides, in 1m+ cities, and particularly in capital cities, leasing additional dining space may be more cost-effective for a particular restaurant than opening a dark kitchen due to the high rents.

Dark kitchn share among restaurants offering delivery



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Source: Data Insight in collaboration with Delivery Club, The value of delivery in the restaurant business, 2020 : https://www.datainsight.ru/Delivery_2020

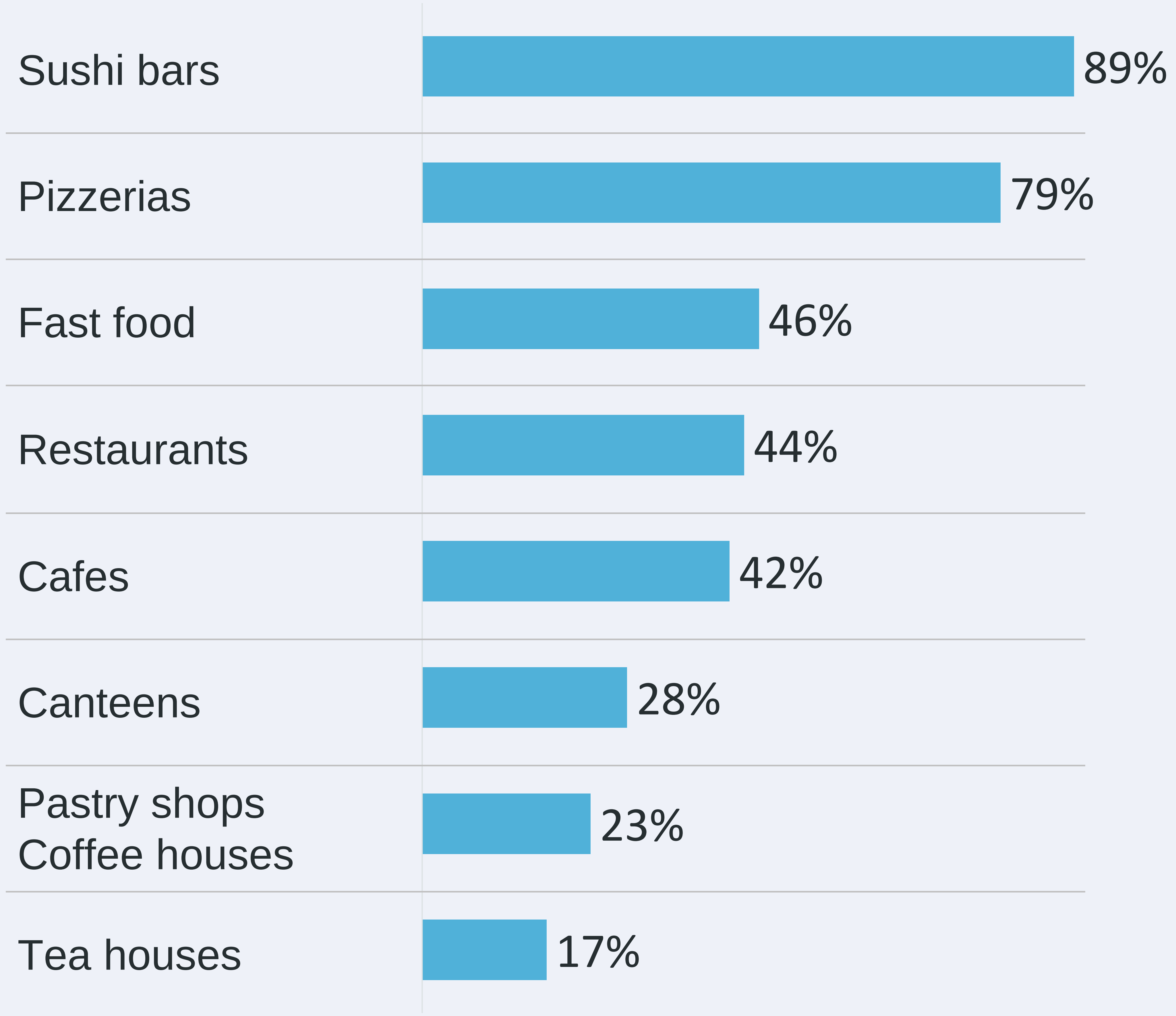
4 # The value of delivery in the restaurant business: success factors and top segments

The delivery option is most frequently offered by sushi bars and pizzerias (89% and 79%, respectively). The share of restaurants in other categories that deliver their orders is below 50%.

According to the restaurant owners, delivery becomes profitable when following conditions are met:

- Meals are prepared quickly, **within 20 minutes**;
- **The restaurant is located centrally or in a residential neighbourhoo** which allows for shorter delivery times;
- **The dishes are easy to transport and** retain their appearance **after delivery;**
- **The restaurant can handle large numbers of orders placed simultaneously:** delivery orders are received around lunch and dinne time, which is already considered 'peak' hours;
- **The key offering of the restaurant is food** rather than style, atmosphere, or alcohol, which cannot be delivered.

Shares of various categories of restaurants offering delivery



Impact of the pandemic on small businesses: millennials' opinion

In June 2020, Data Insight approached entrepreneurs of different backgrounds and lines of business and asked them how they survived self-isolation and how they envision e-commerce in the near future.

E-commerce development

9 out of 14 businessmen noted that their involvement in e-commerce has increased since the start of the pandemic. E-commerce activities also developed in the companies providing services to customers, e.g. such as massage and fitness services.

Government support for business

More than half of the surveyed businessmen benefited from government support in the form of minimum wage payments and subsidies, some of which did not expect the state to interfere.

Pandemic as a threat

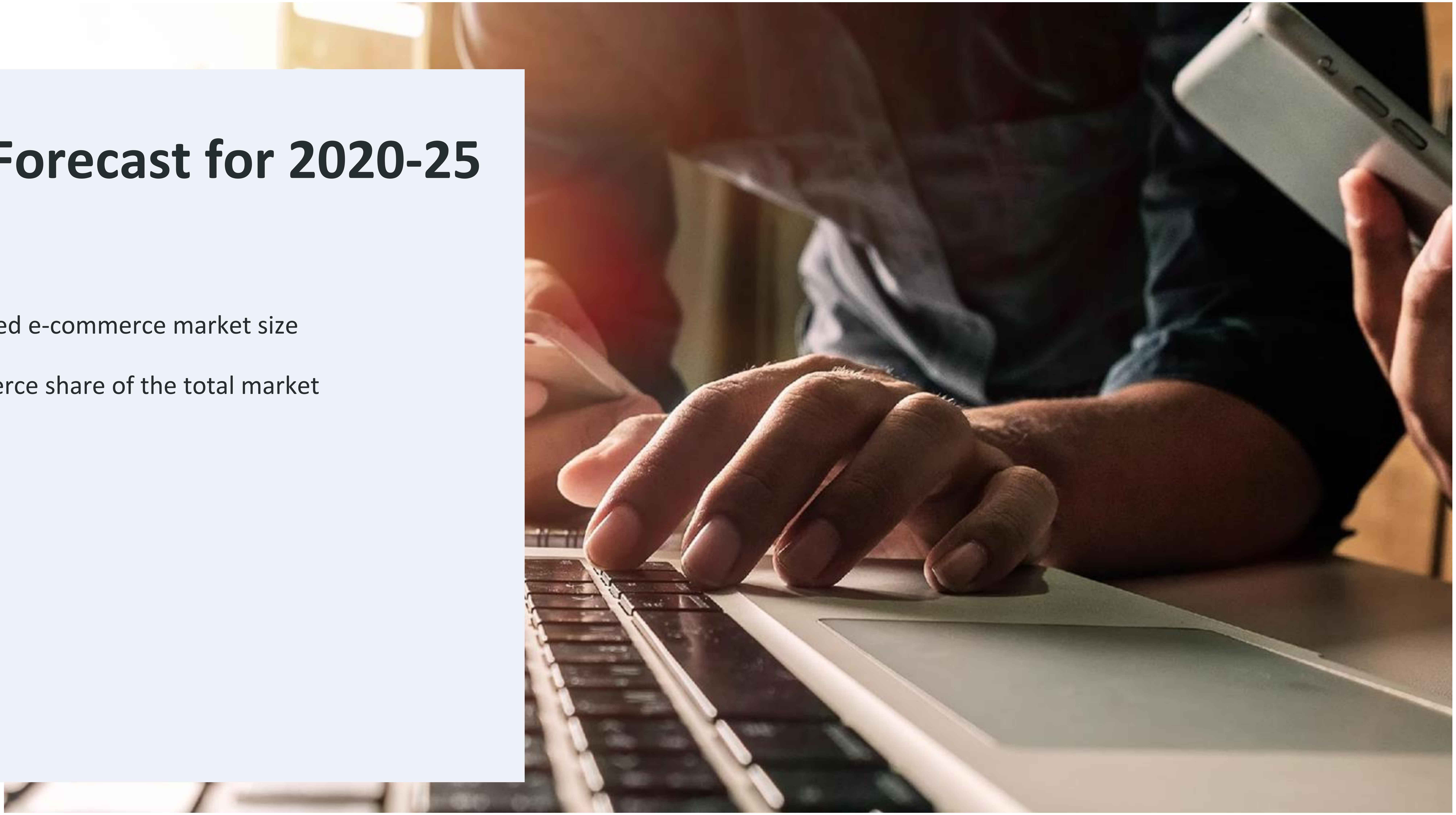
12 out of 16 entrepreneurs described the pandemic as a threat to their business. Half of the respondents reported a decrease in the purchasing power and challenges in attracting new customers. Some specified that their business was adversely affected by the closure of borders and suspension of raw materials imports.

Pandemic as a threat

9 entrepreneurs mentioned exploring new tools to support business development. Some respondents noted that during self-isolation they managed to improve their business organization, particularly by reviewing partnerships and preferred types of employment.

According to all respondents, e-commerce will grow further, despite all the existing challenges and a sharp change in the market conditions.
Some of them believe that the pandemic will prompt the development of new technical functionality enabling businesses and customers to go online.

Source: Data Insight in collaboration with Ozon, Millennials in Business, 2020

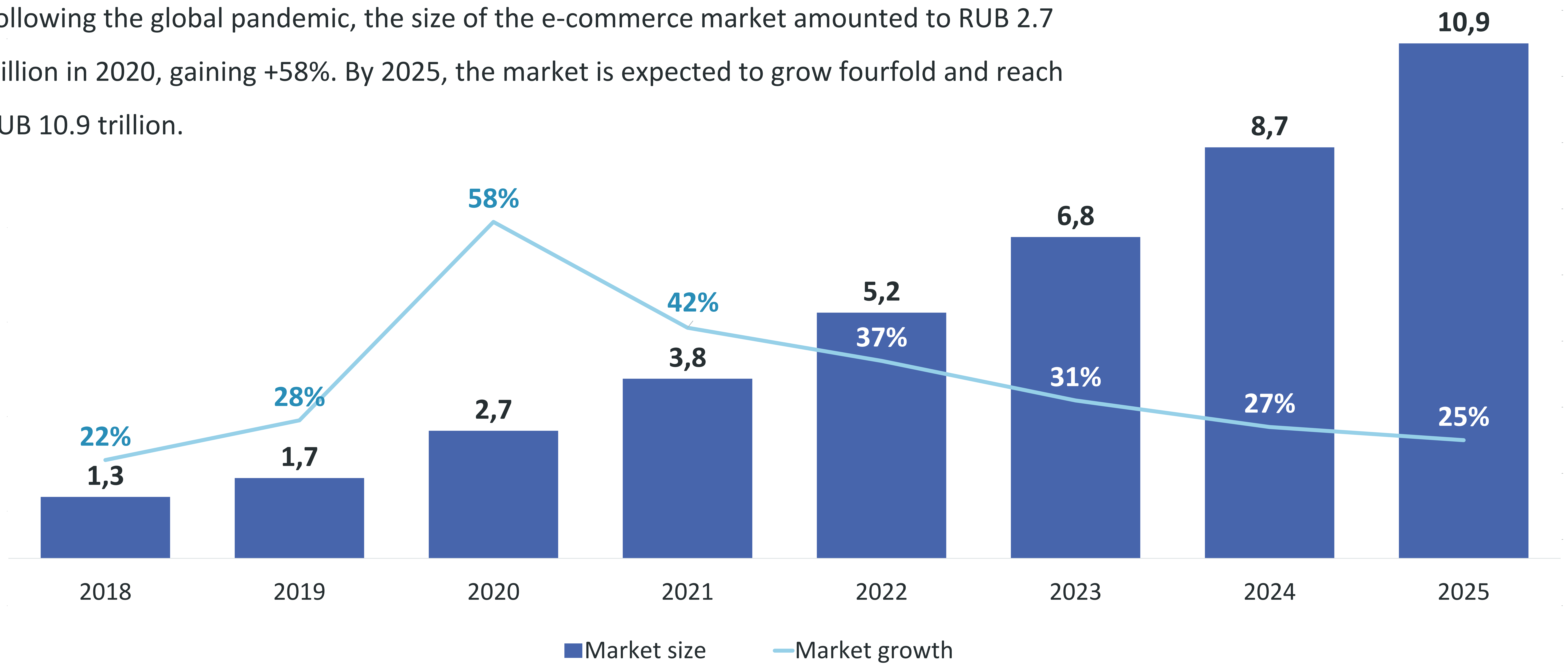


B2C: Forecast for 2020-25

- Forecasted e-commerce market size
- E-commerce share of the total market

5 Forecasted e-commerce market size: market size

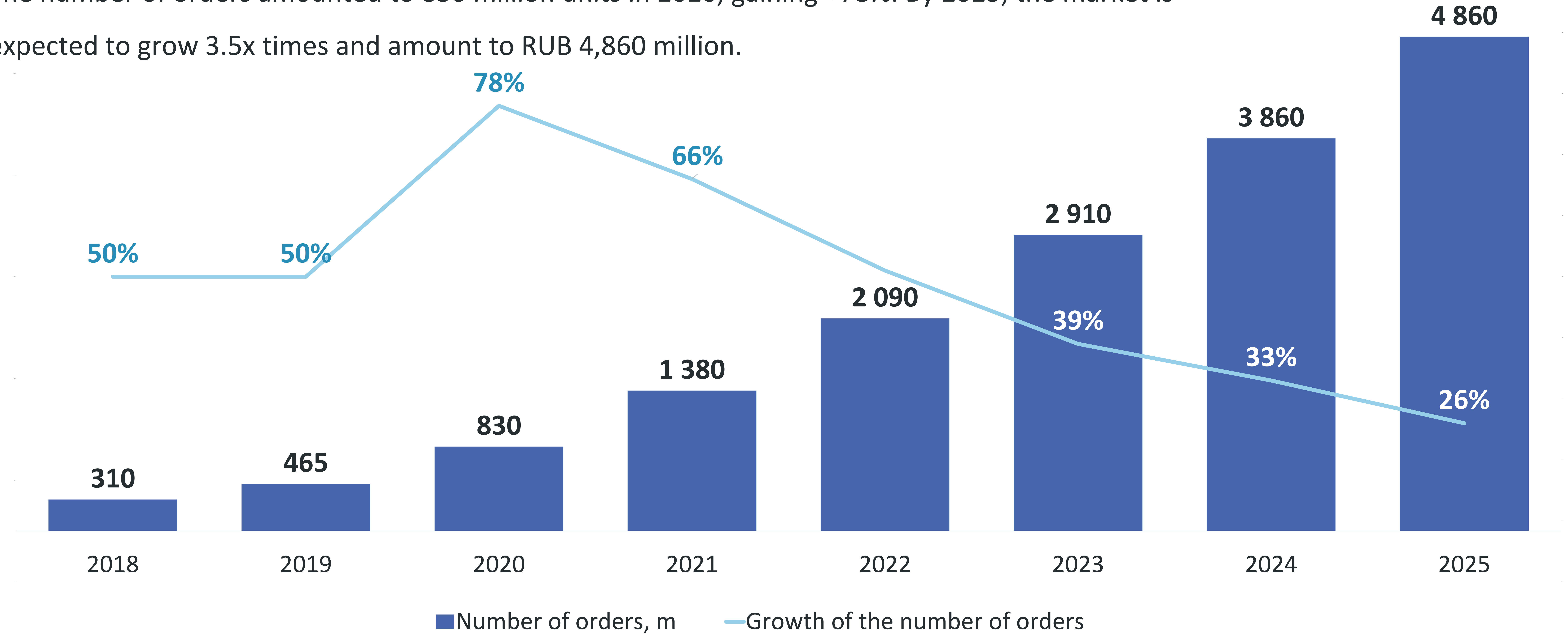
Following the global pandemic, the size of the e-commerce market amounted to RUB 2.7 trillion in 2020, gaining +58%. By 2025, the market is expected to grow fourfold and reach RUB 10.9 trillion.



Source: Data Insight, March 2021

5 Forecasted e-commerce market size: number of orders

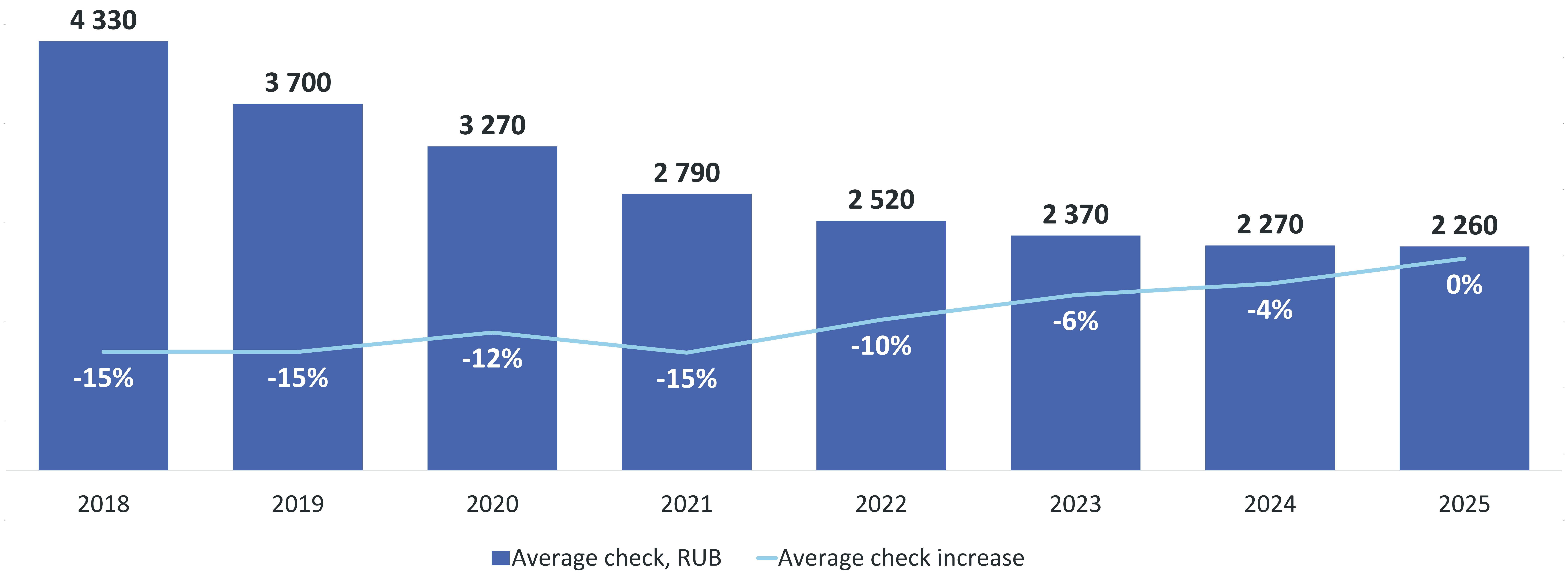
The number of orders amounted to 830 million units in 2020, gaining +78%. By 2025, the market is expected to grow 3.5x times and amount to RUB 4,860 million.



Source: Data Insight, March 2021

5 Forecasted e-commerce market size: average check

The average check decrease subsides each year: in 2025, the average check is expected to remain at 2024 level.



Source: Data Insight, March 2021

E-commerce share of the total market

The share of e-commerce in retail trade will expand annually: it amounted to 8% in 2020 and is expected to reach 26% in 2025.

Source: Data Insight, forecast based on the Russian Federal State Statistics Service data for March 2021

C2C market in Russia

- Online C2C in Russia in 2020
- C2C sellers: profiles, geography, delivery options and areas
- Product categories on the C2C market
- Russian C2C market in 2020: 5 key facts

0 Online C2C in Russia, 2020

C2C commerce is understood as the acquisition of new or used tangible goods, exclusive of motor vehicles and real estate, by individuals from other individuals over the Internet.

The number of sellers involved in C2C transactions was 13.2 million. The number of buyers grew to 13.3 m. The number of purchases increased by 70% over the past 1.5 years.

301 m
sales

RUB 3,530
average check

1,0
RUB trillion
REVENUE

CAGR 2017-2020
53.2%

CAGR means compound annual growth rate for the period from 2017 to 2020.

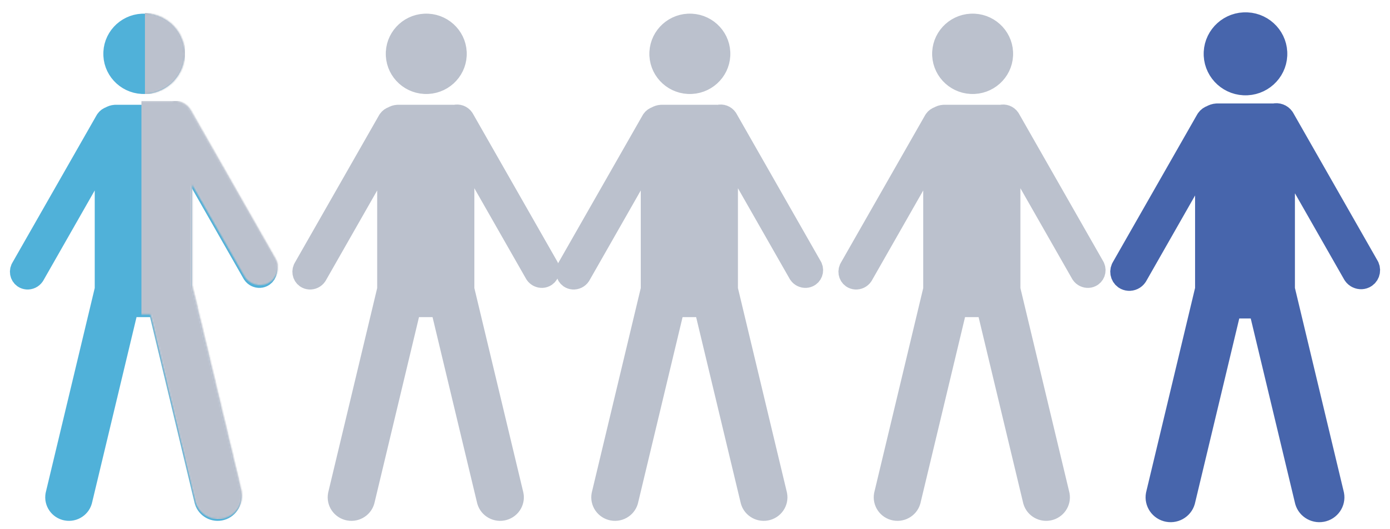
Source: Data Insight in collaboration with Avito, C2C on the Russian Internet. E-commerce of Individuals, 2020 – https://datainsight.ru/DI_Avito_C2C_2020

C2C sellers: profiles

2020 saw a significant growth of the share of middle-income sellers. The distribution of C2C sellers by gender shifted strongly in favor of men. As for the sellers' age structure, the role of older groups continues to increase: the share of C2C sellers aged 55+ grew from 4% to 10% over 3 years. In 2017, the share of sellers under 35 was 62%, while in 2020, almost the same percentage (61%) was comprised of sellers over 35.

C2C sellers spread by income and gender

Sellers' income

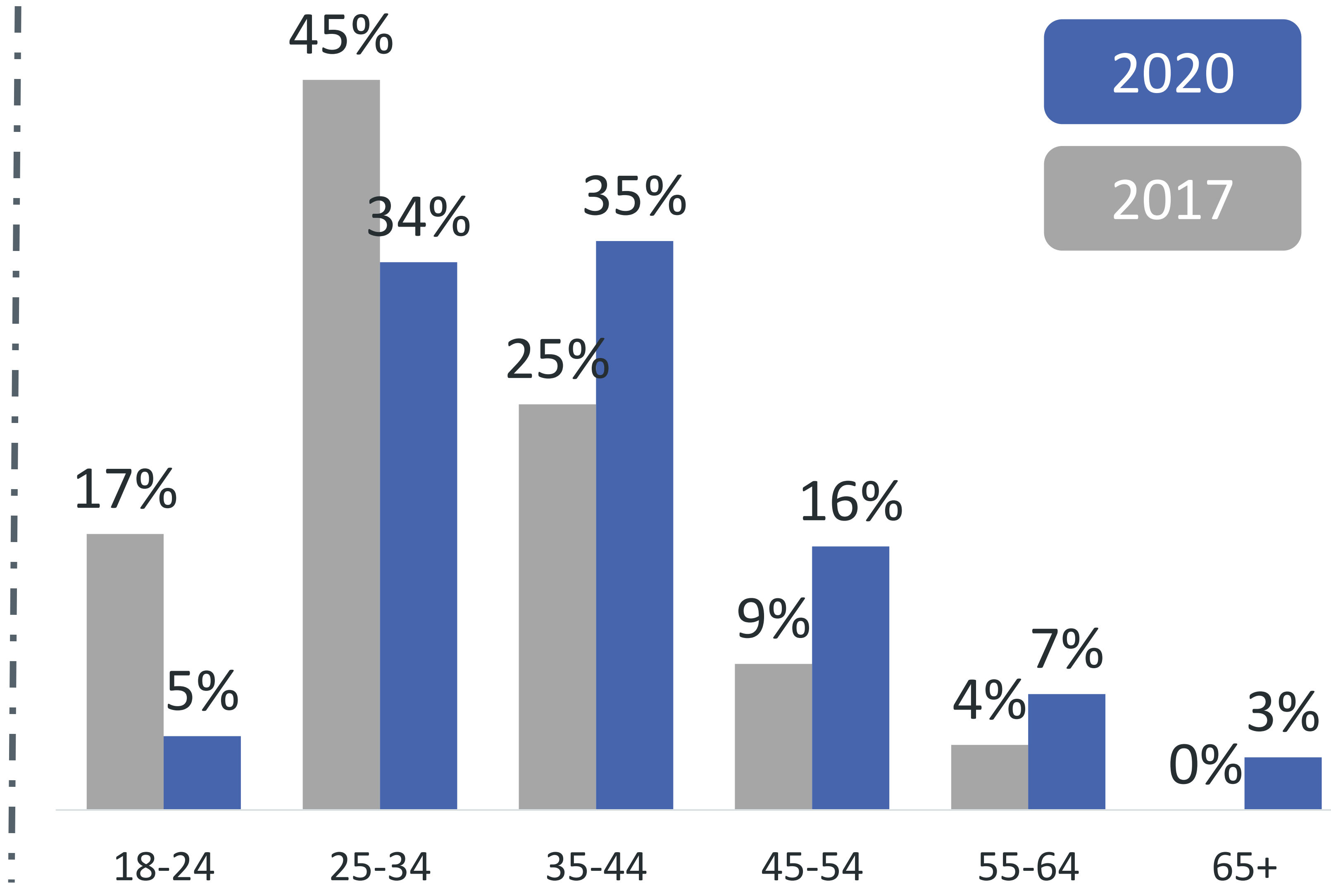


	Low	Average	High
2020	3%	87%	10%
2017	7%	78%	15%

Gender

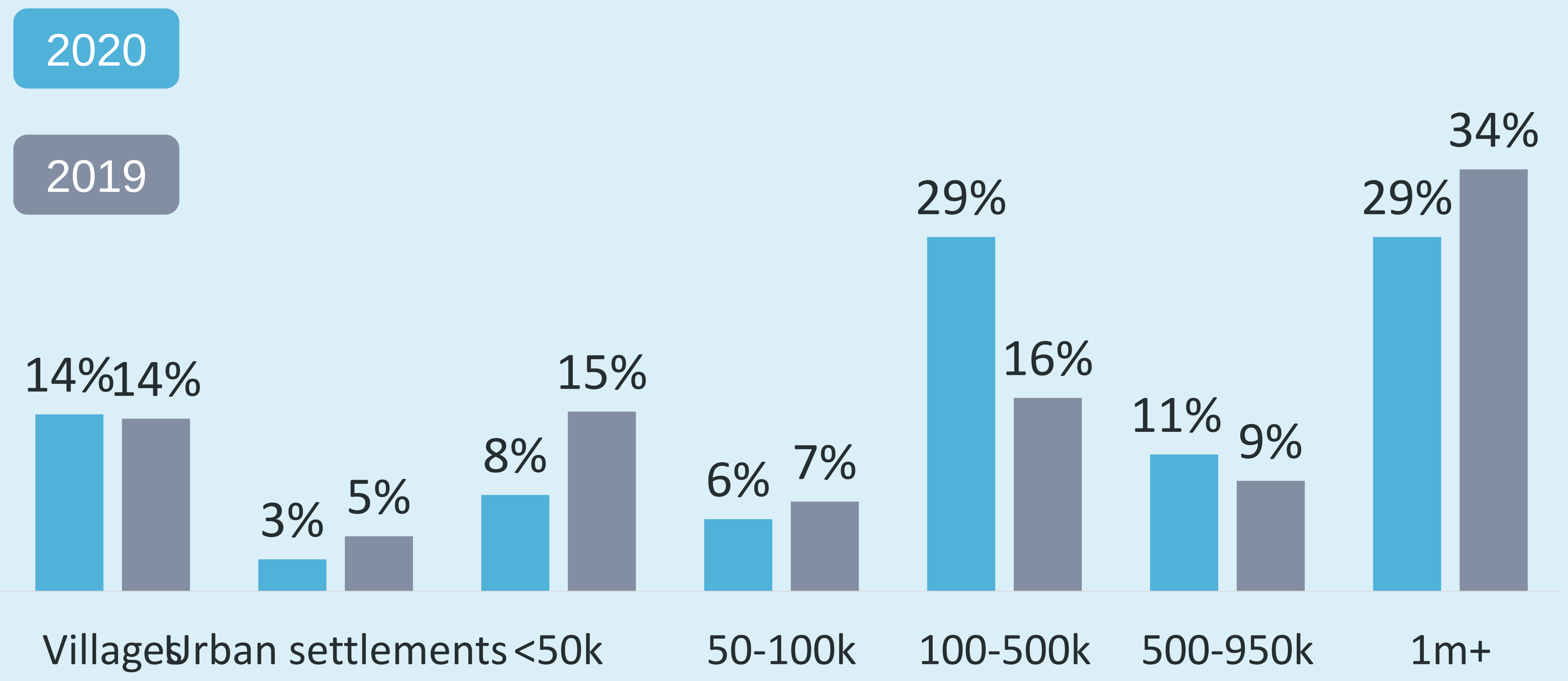
	2017	2020
♂	49%	63%
♀	51%	37%

C2C sellers spread by age



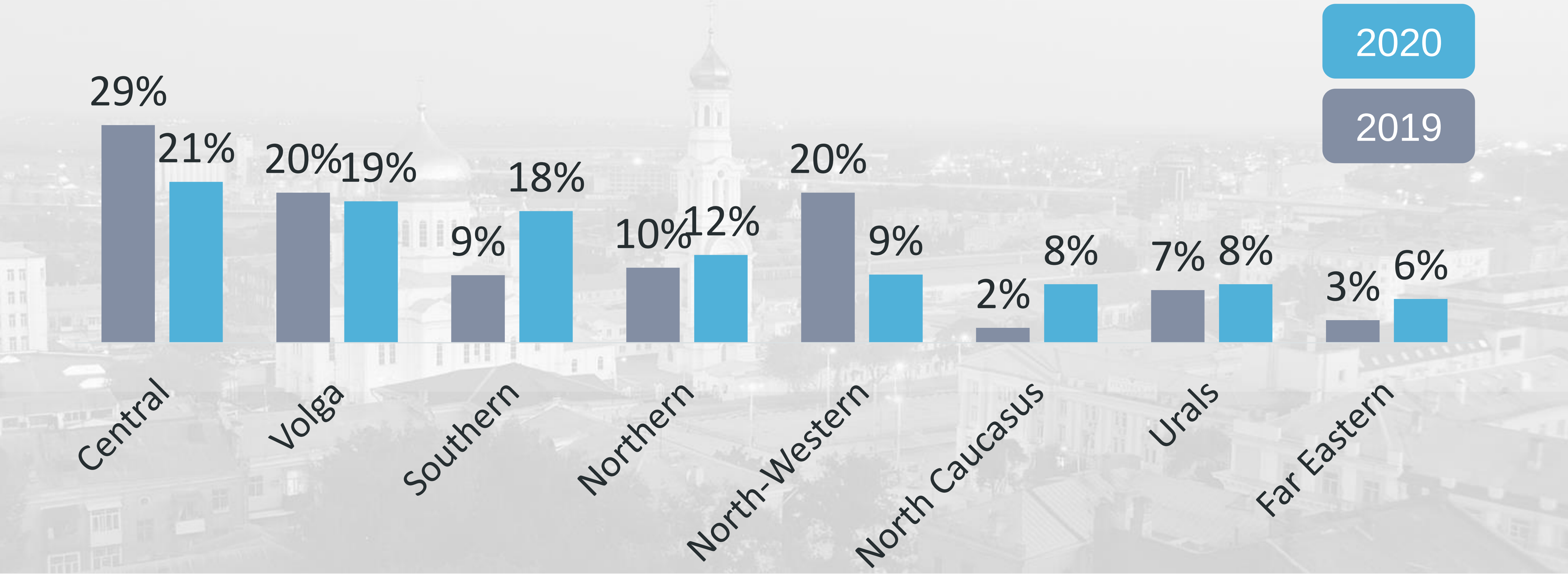
6 C2C sellers: geography

Individual sellers spread by location type



The fastest growing proportion of C2C sellers is among the population of cities with 100k+ to 1 m+ residents. While in 2019 such locations accounted for 25% of C2C sellers, in 2020 their share increased to 40%.

Individual sellers spread by location type



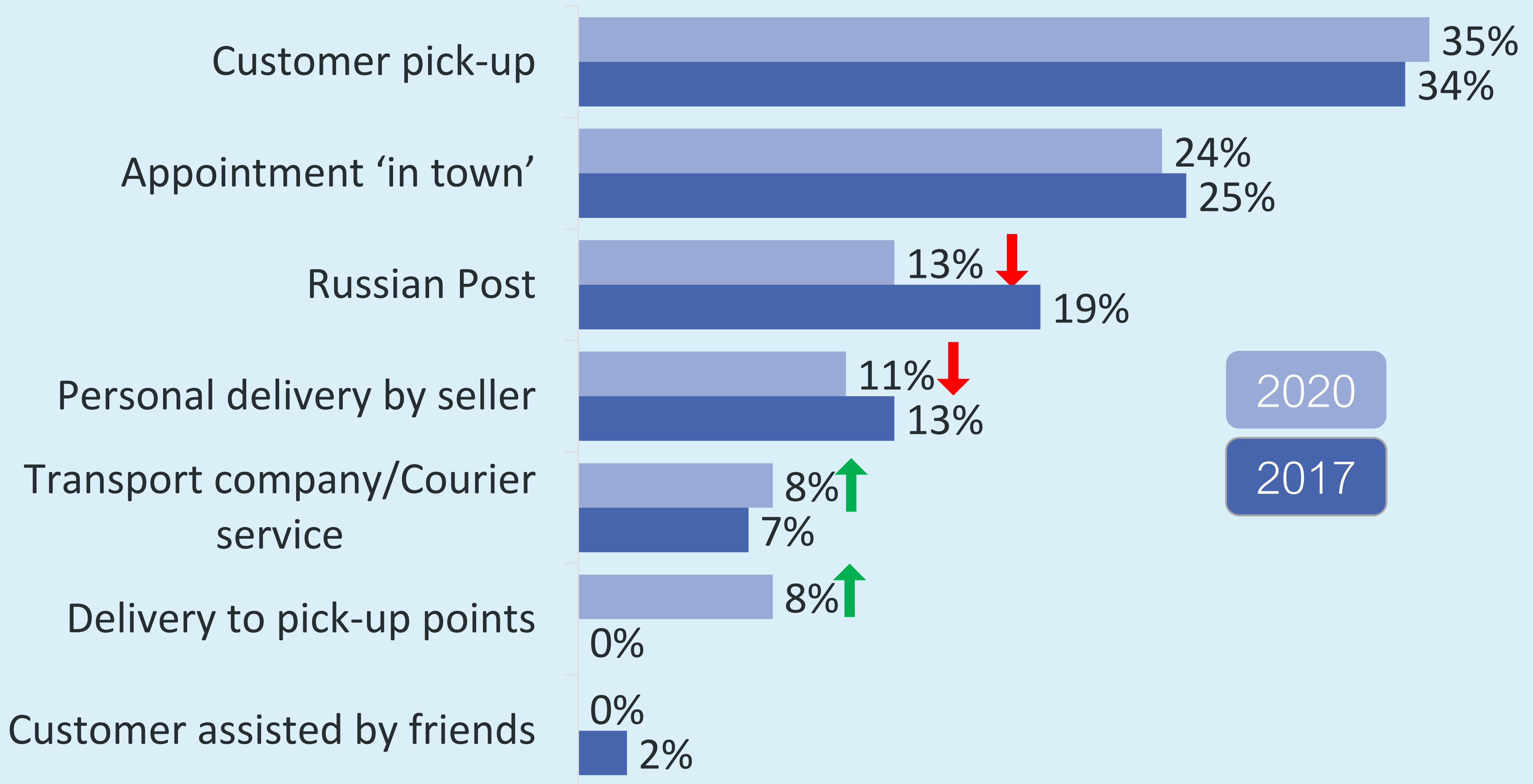
South and North Caucasus Federal Districts showed the the fastest growing number of C2C sellers over the past three years. The shares of Central and especially North-Western Federal Districts reduced significantly. In 2017, they accounted for almost half of the sellers collectively, while in 2020 their total share dropped to 29%.

6 C2C sellers: delivery options and areas

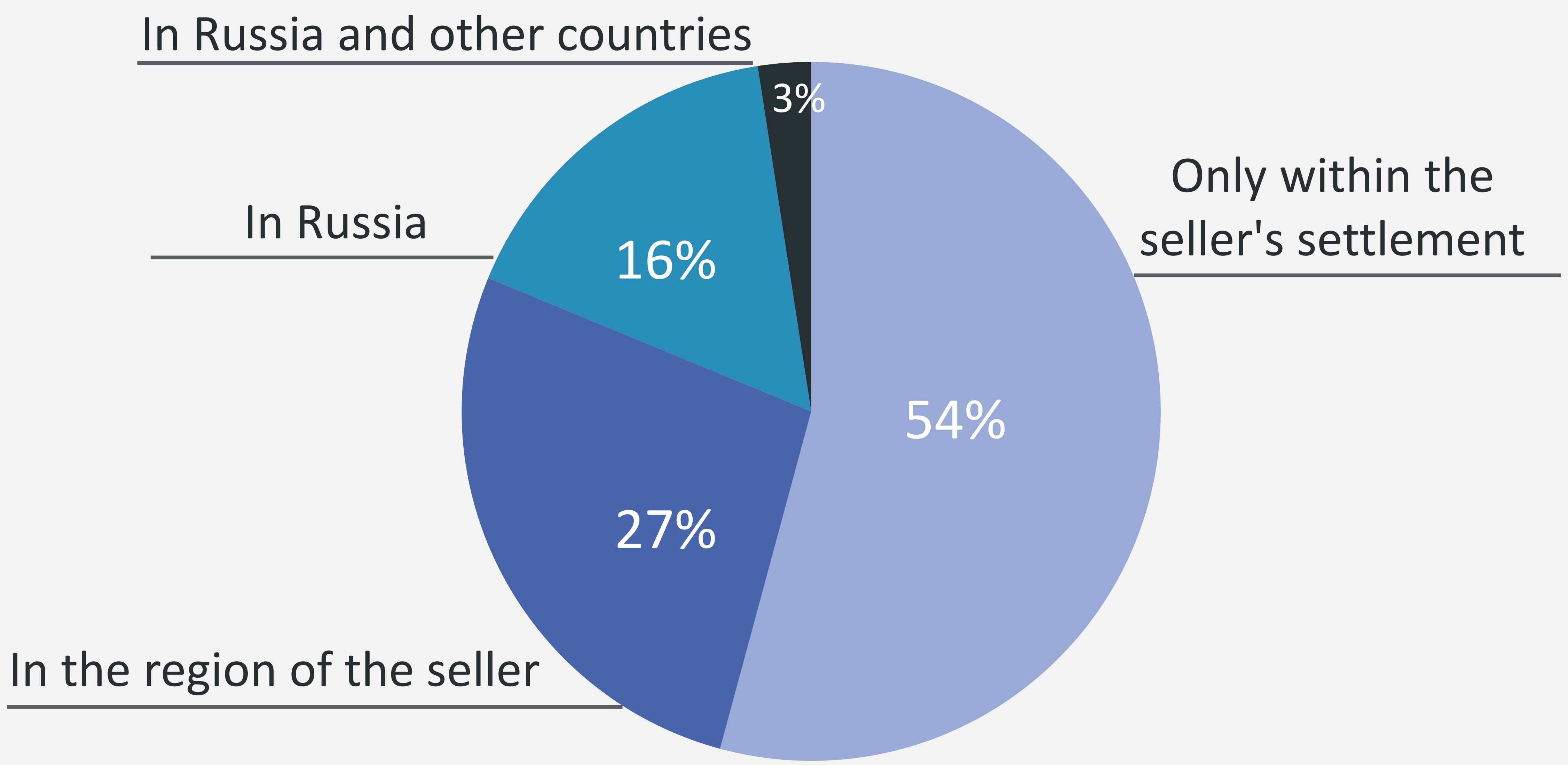
In 2020, **C2C players started shipping goods using a transport or courier company** more often, which was particularly the case for deliveries to pick-up points. The share of deliveries made in person, as well as those carried out via the Russian Post, decreased.

The geographic coverage of C2C sales continues to expand: the share of sellers active only within their own location or region reduced in 2020, while the share of those delivering orders outside their region grew from 8% in 2017 to 19% in 2020.

Order delivery methods used by C2C sellers



Where do your buyers live? Sellers' responses



6 C2C product categories: sales in various products categories

Share of new products in C2C sales contiues to grow.

The share of C2C sales **of new items and products that did not fit the seller** collectively amounted to 27% in 2017, while in 2020, these categories accounted for 8% and 32% of the total C2C sales, respectively.

The top-3 most popular product categories on the C2C market are electronics and home appliances, apparel and footwear and children's goods, accounting for 34%, 30% and 25% of the market, respectively.

Most transactions (24%) were in the category of electronics and home appliances, followed by children's goods (18%) and auto parts and accessories (17%).

In 2020, the total amount under the survey question exceeds 100% since a transaction can include more than one product.

Source: Data Insight in collaboration with Avito, C2C on the Russian Internet. E-commerce of Individuals, 2020: https://datainsight.ru/DI_Avito_C2C_2020

6 Russian C2C market in 2019: 5 key facts

MARKET

The online C2C market in monetary terms **gained 87% over 1.5 years**: its yearly size **amounted RUB 1.06 trillion in 2020, compared to RUB 568 billion in H2 2018 – H1 2019**.

The number of online purchases on the C2C market rose **by 70% in 1.5 years and reached RUB 301 million**.

SELLERS AND BUYERS

In 2020, still more buyers entered the C2C market, while the number of sellers stopped growing, despite a higher frequency of sales. The number of sellers and buyers amounted to **13.2 million and 13.3 million, respectively**.

TRANSACTIONS

Monthly transactions per seller are growing: **in 2017, one seller averaged one sale per month, while in 2019 this number increased to 1.3 and in 2020 to 2.3 sales.**

The number of long-distance and cross-regional transactions demonstrated a growth trend again, **as well as the demand for delivery, particularly the delivery to pick-up points.**

Online
retail exports

- Online retail exports into Russia, 2020
- Online retail export revenue: overview
- Deliveries in retail exports
- Online retail exports structure by country, 2018-20
- Product categories in online retail exports
- Online retail exports by federal district

7 Online retail exports in Russia, 2020

Online retail exports are understood as orders placed with Russian online stores by international customers via the store website, social media and other channels, sales via representative offices and the store websites with international country-code domains, as well as cross-border orders placed with Russian SMEs via sales platforms, including global marketplaces and social media.

27,4 m
shipments

USD 42
average check

Compared to last year, the number of shipments grew by 11.7 million, while the average check decreased by 19%.

$1,16 bn

RUB 83.8 bn.

MARKET SIZE

Source: Data Insight in collaboration with eBay, Retail exports via the Internet, 2020: datainsight.ru/DI_eBay_Export2020

7 Online retail export revenue: overview

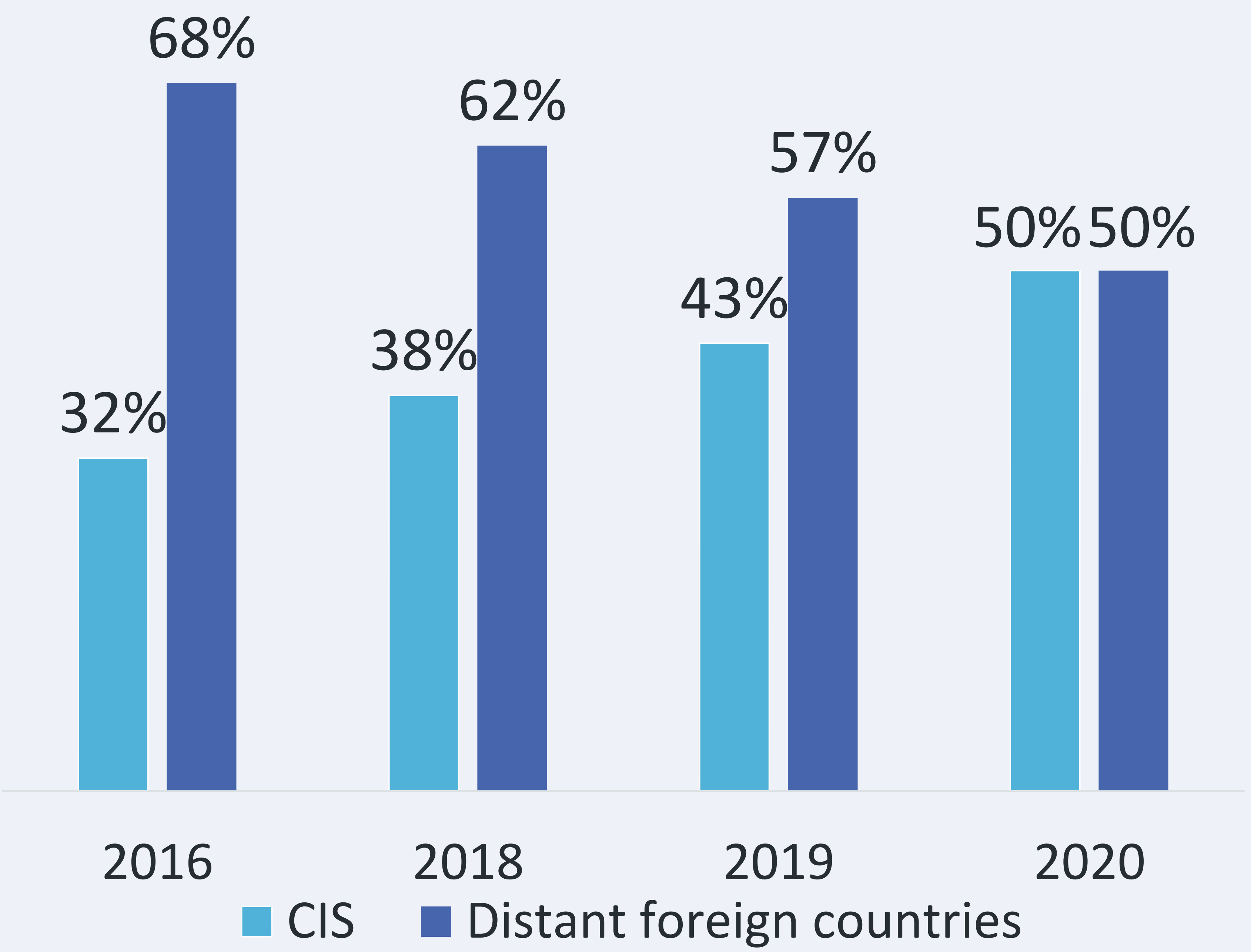
Source: Data Insight in collaboration with eBay, Retail exports via the Internet, 2020: datainsight.ru/DI_eBay_Export2020

Online retail exports structure by country, 2018-20

Near-abroad countries	2018	2019	2020
Belarus	17,5 %	**21,8 %**	**22,3 %**
Kazakhstan	13,7 %	12,9 %	17,7 %
Ukraine	6,6 %	4,6 %	5,6 %
Other near-abroad countries		3,5 %	3 %

Foreign countries	2018	2019	2020
The USA	17,6 %	**20,4 %**	**17,3 %**
Western Europe	10,7 %	10,4 %	10,8 %
The UK	3,8 %	3,8 %	4,0 %
Israel	2,0 %	2,2 %	3,0 %
Canada	2,2 %	2,3 %	2,2 %
China	2,4 %	1,9 %	1.3%
Other foreign countries		20,0 %	10,0 %

The CIS countries have played an increasingly important role in online retail exports from Russia. According to the forecast 2020E, their share in the export revenue of Russian sellers will reach 50%.



* Former USSR republics (except for the Baltic countries)

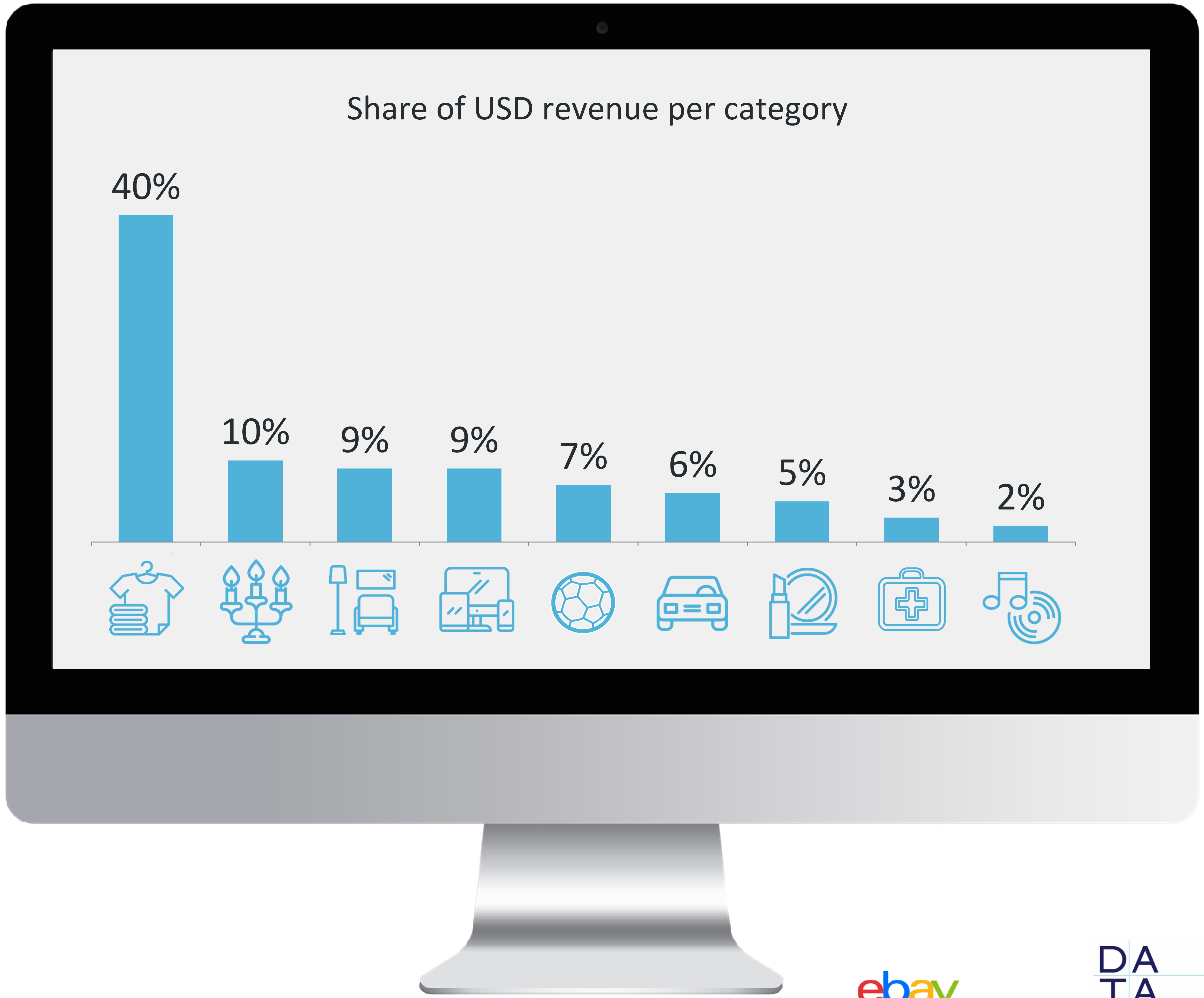
Source: Data Insight in collaboration with eBay, Retail exports via the Internet, 2020: datainsight.ru/DI_eBay_Export2020

7 Product categories in online retail exports

Apparel and footwear topped all product categories in terms of USD revenue for the third year in a row.

Most dynamic categories in 2019:

- Homeware and decor with +215% YoY* growth;
- Sports and recreation products with +101YoY* growth



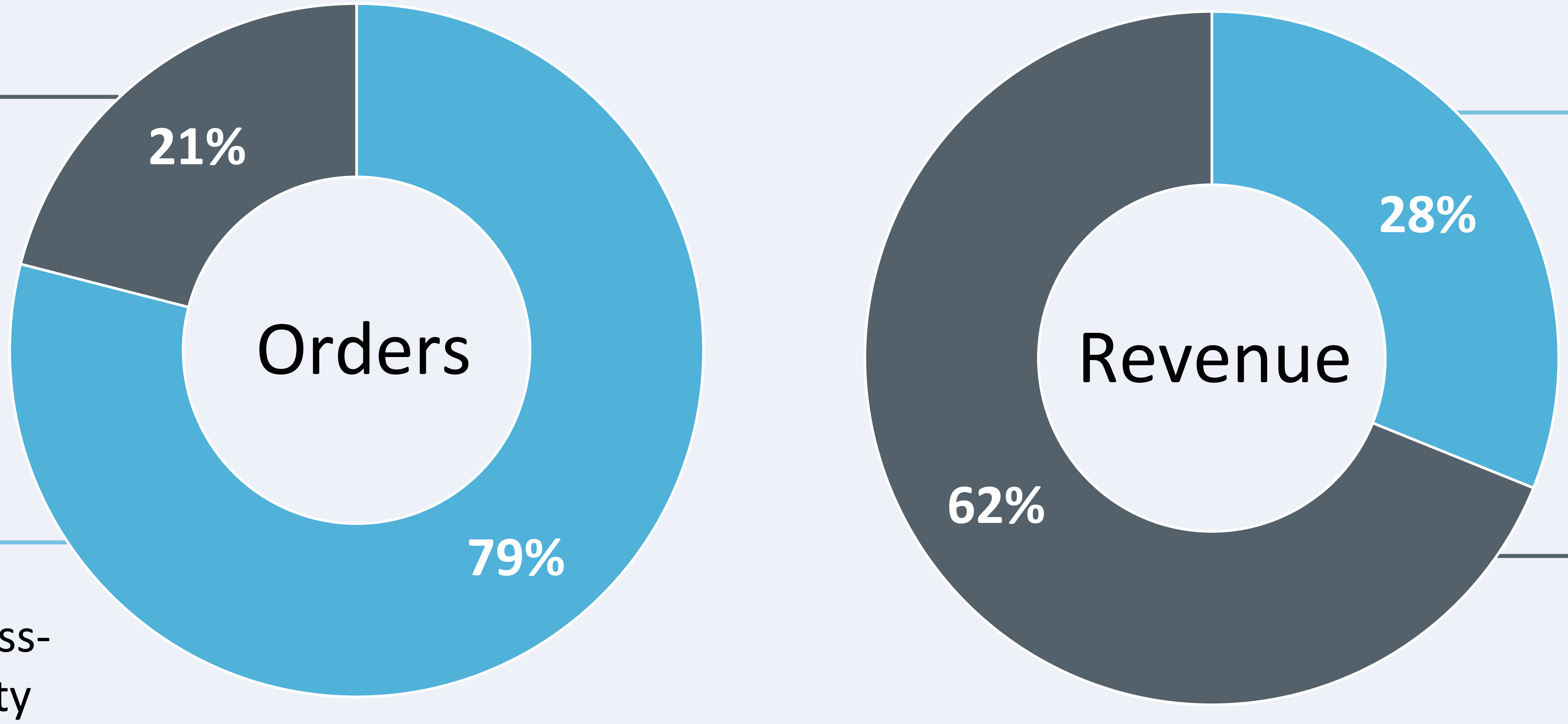
* YoY means year-over-year

Source: Data Insight in collaboration with eBay, Retail exports via the Internet, 2020: datainsight.ru/DI_eBay_Export2020

7 / Deliveries in online retail export

5.8 m parcels
will be delivered by transport companies

21.6 m parcels
will be delivered via platforms with own cross-border delivery capacity



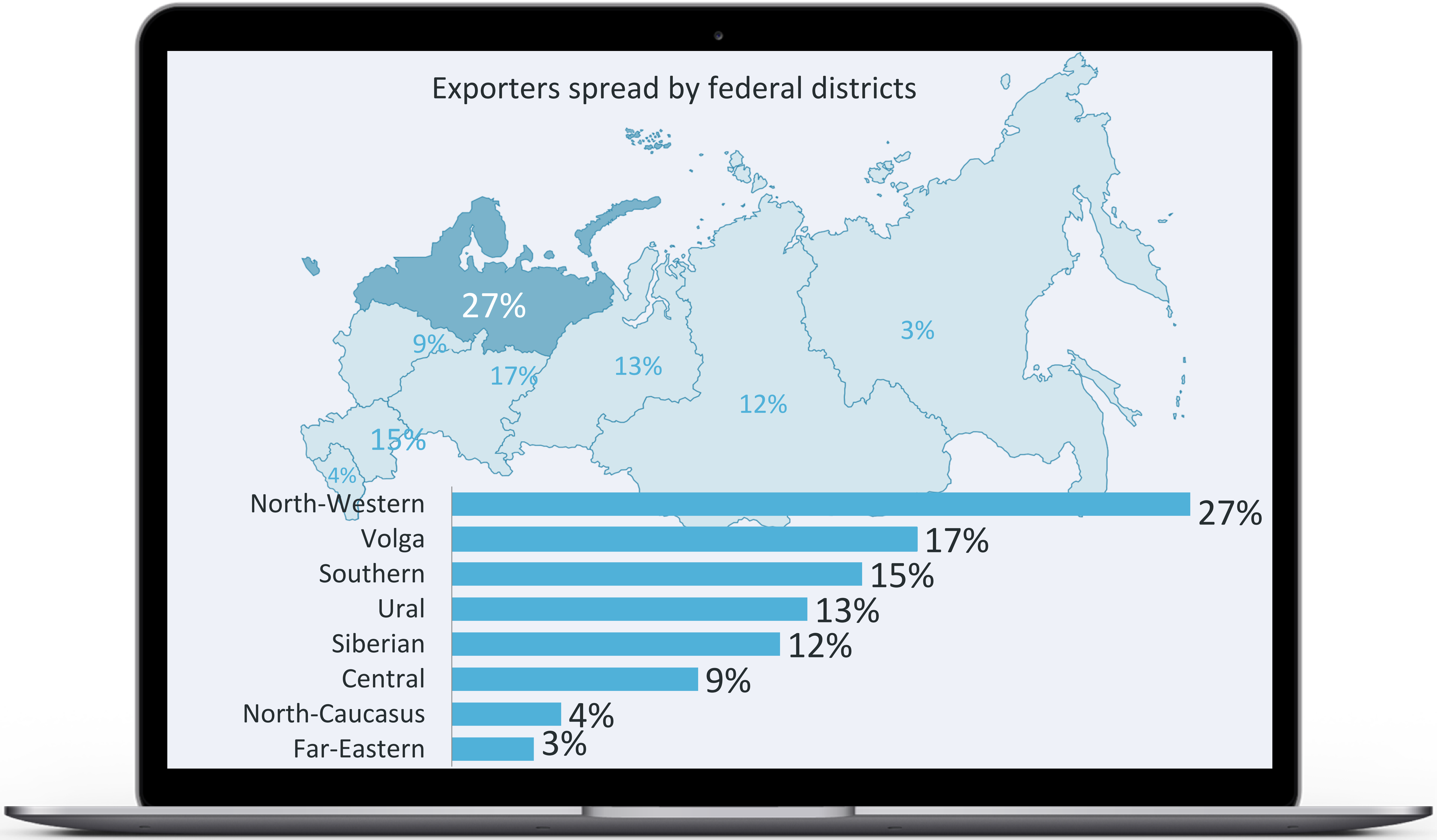
USD 437 m
of the export revenue will be generated by orders made via sales platforms with own cross-border delivery capacities, such as Wildberries, Lamoda, Ozon

USD 723 m
of the export revenue will be generated by orders made via sales platforms (such as Ebay, Etsy), as well as in Russian online stores directly

- **Sales platforms and marketplaces with own delivery service**
- **Sales platforms and marketplaces using third-party transport companies**

Source: Data Insight in collaboration with eBay, Retail exports via the Internet, 2020: datainsight.ru/DI_eBay_Export2020

7 Online retail exports by federal district



17 regions with the share of eBay exporters above the national average

Export activities of SMEs by region*:

169 (+24) Saint Petersburg
169 (-17) Moscow
164 (-17) Bashkortostan
147 (-17) Tyumen Region
137 (+7) Mari El Republic
123 (+5) Moscow Region
121 (+5) Voronezh Region
117 (-13) Yaroslavl Region
116 (+18)Saratov Region
113 (+11) Omsk Region
111 (+4) Udmurtia
111 (-16) Novgorod Region
110 (+49) Volgograd Region
108 (-13) Kaliningrad Region
104 (+18) Samara region
102 (+11) Chelyabinsk region

*The regional export index is calculated as the Affinity Index and equals the ratio of Ebay-listed exporters' share (percentage) in the regional companies to their share in all Russian companies.

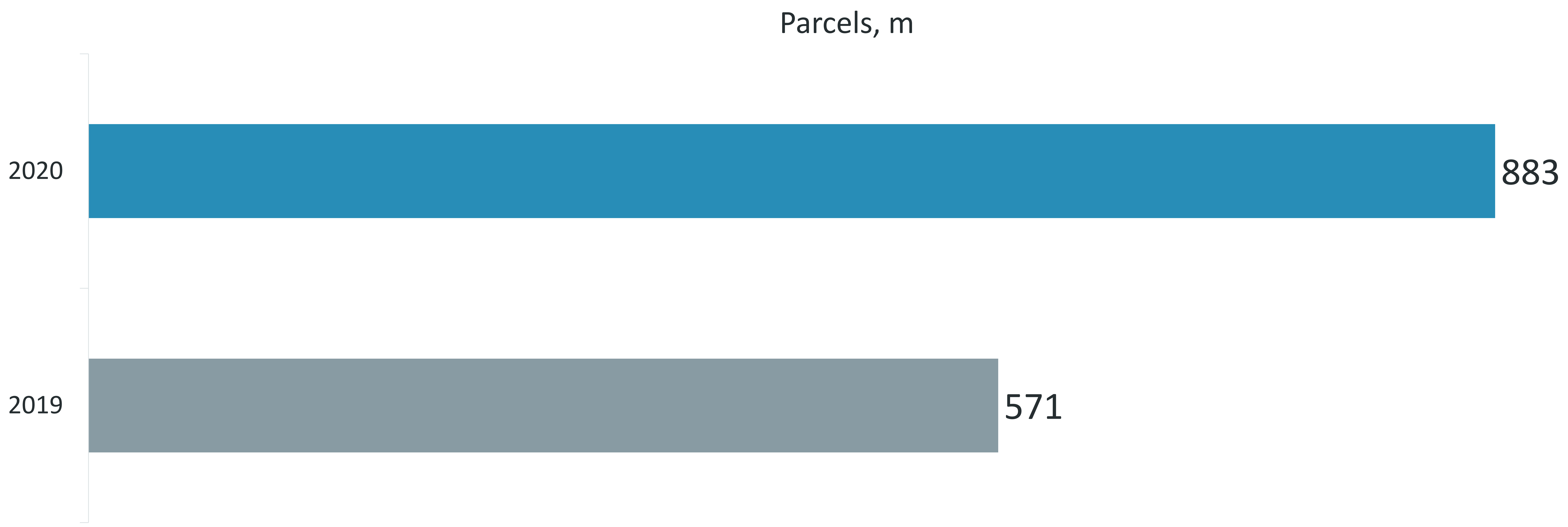
Source: Data Insight in collaboration with eBay, Retail exports via the Internet, 2020: datainsight.ru/DI_eBay_Export2020

Logistics for e-commerce

- The size of the Russian e-commerce logistics market
- Logistics for e-commerce in Russia, 2020Q3
- Break-down by delivery channel
- Delivery options at online stores, 2020Q3
- Courier delivery and pick-up points in big cities, 2019-2020H1
- Delivery to pick-up points in big cities, 2019-2020H1
- Bulky goods delivery, 2019
- Fulfillment

8 The size of the Russian e-commerce logistics market

Data Insight estimates that **883 million shipments were made in 2020 alone.** This is 35% more than in 2019.



The estimate is based on data provided by logistics companies and the Russian Post, as well Data Insight information on the number of shipments on the e-commerce market. The estimate includes C2C sales made by individuals on social media, via specialized platforms and MLM. The estimate does not include food imports, exports or sales. The shares of Wildberries and Ozon are calculated based on the number of orders rather than shipments, which sometimes vary.

* including all modes of transport and transportation segments

Source: Data Insight, The logistics of E-commerce, 2020: http://logistics.datainsight.ru/logistika-dlya-elektronnoy-torgovli

8 Logistics for e-commerce in Russia, 2020

Logistics for e-commerce encompasses all options that are available for the end customers to receive orders made online.

	2020, million parcels	2020, share in total parcels	2019, million parcels	2019, share in total parcels	Growth in 2020 vs 2019
Russian Post	**104**	**12%**	**95**	**17%**	**+9%**
Logistics companies	**203**	**23%**	**141**	**29%**	**+31%**
In-house delivery services	**576**	**65%**	**335**	**59%**	**+42%**
Total	**883**		**331**		**+35%**

Below are some of the key factors that influenced the logistics market in 2020:

1. The pandemic prompted an increase in the number of online buyers, transition to remote work, demand for contactless delivery;

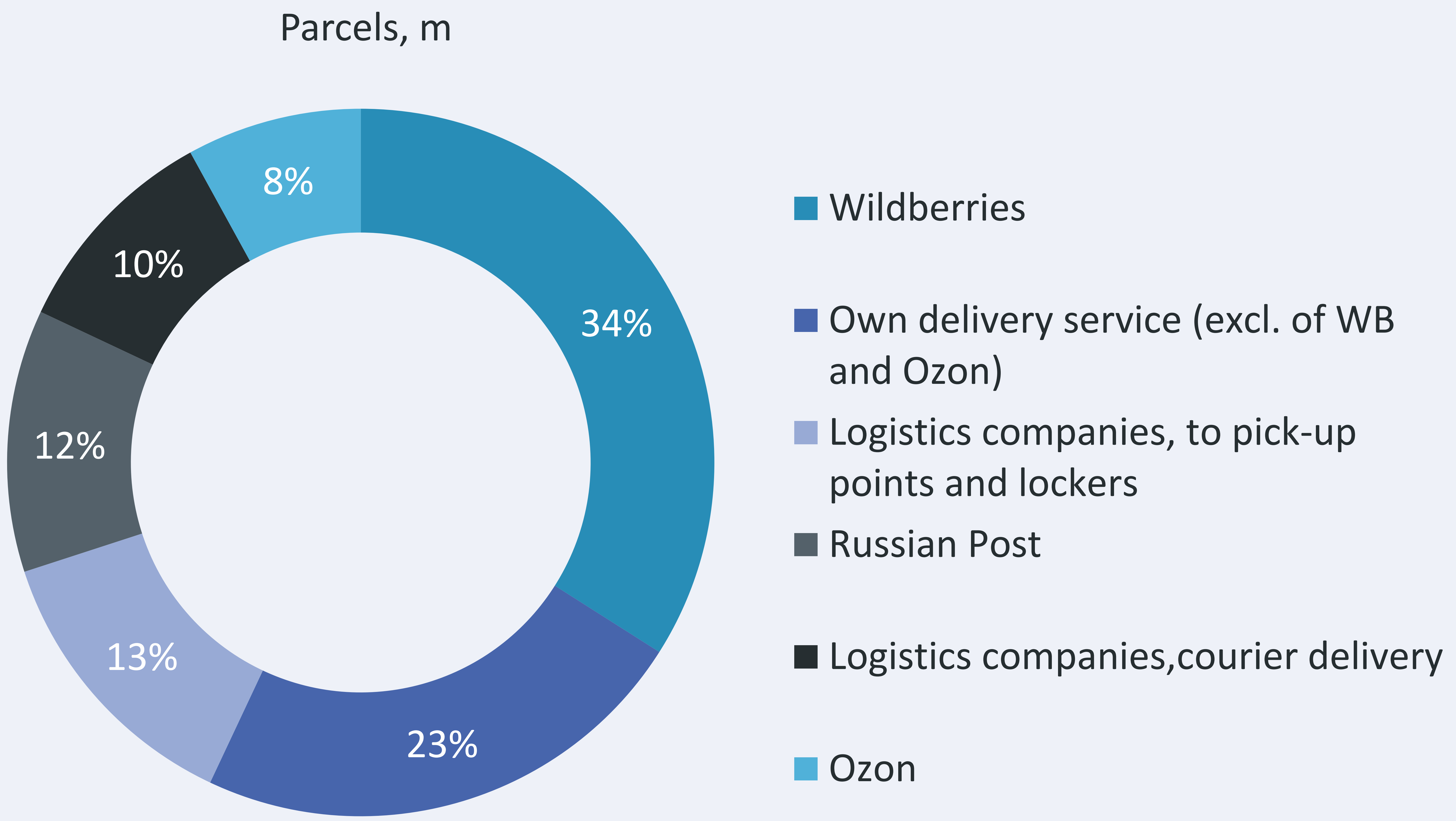
2. Rapid growth of large stores and marketplaces with own delivery services: 64% of online orders delivered over three quarters of 2020 were shipped by in-house delivery services.

Source: Data Insight, Logistics for e-commerce, 2020: http://logistics.datainsight.ru/logistika-dlya-elektronnoy-torgovli

Shares by delivery channel

64% of parcels

were delivered by the sellers' own logistics services (In-house capacity, Wildberries, Ozon, 2020).



Source: Data Insight, Logistics for e-commerce, 2020: http://logistics.datainsight.ru/logistika-dlya-elektronnoy-torgovli

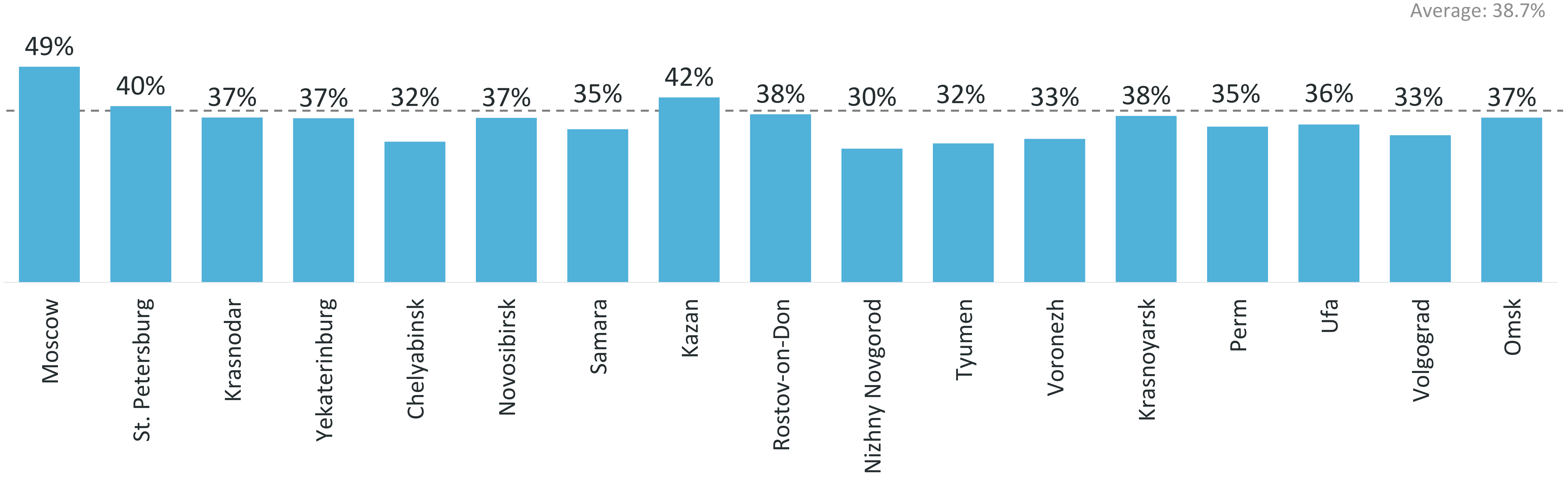
8 Delivery options at online stores, 2020Q3

Almost all online stores (97%) offer courier delivery.

The majority of sellers, i.e. 94% of the top 100 and 90% of other stores, provide online order shipment to pick-up points. Partner network distribution points are equally popular among all stores. There is no link between the number of stores that rely on pick-up points and locker networks and their size. The share of stores carrying out shipments to partner lockers and mail deliveries among the 100 largest players are approximately the same at 36% and 33%, respectively. Outside the top 100, mail deliveries are more popular than lockers.

8 Courier delivery in big cities

Moscow, St. Petersburg and Kazan account for the largest share of orders delivered by courier. In general, courier delivery is more common in large cities. The national average share of this delivery method is 38.7%.

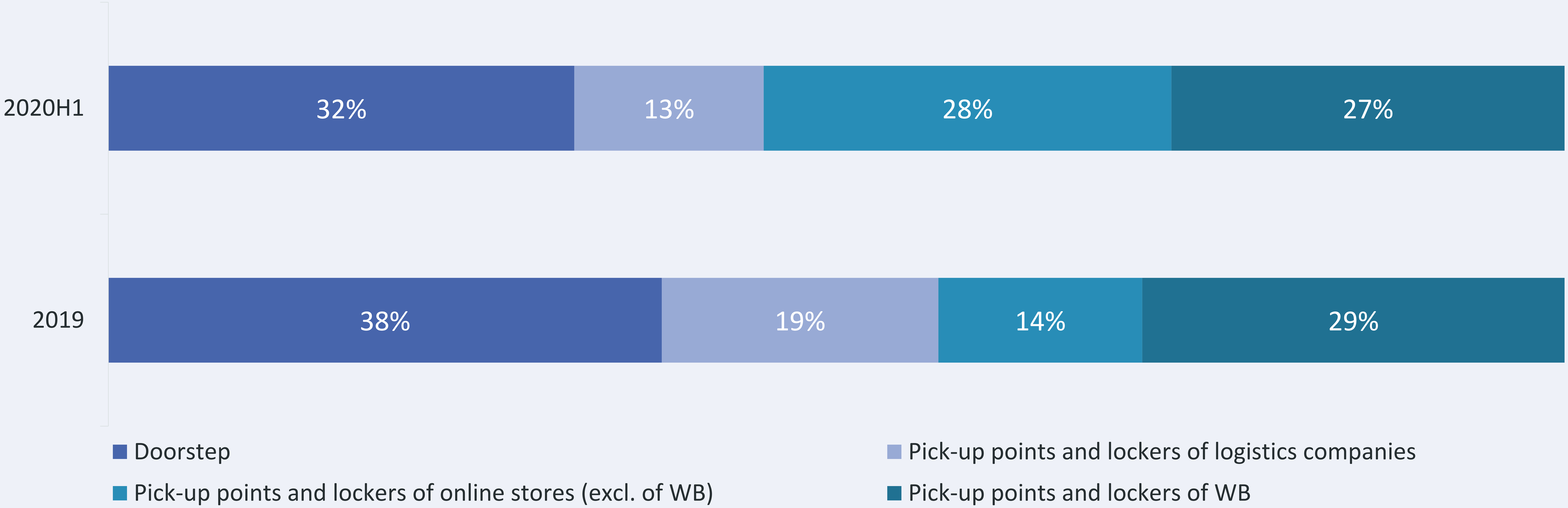


Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, 2019: datainsight.ru/PP-DeliveryRussia2019

8 Delivery to pick-up points: market shares

-Doorstep -pick-up points and lockers of logistics companies -Pick-up points and lockers of online stores (excl. of WB) -Pick-up points and lockers of WB

Pick-up points and lockers are still the most popular delivery channel. According to Data Insight, 68% of all parcels delivered in 2020H1 were received via pick-up points and lockers. The market leader Wildberries ships 90% of all orders to pick-up points.



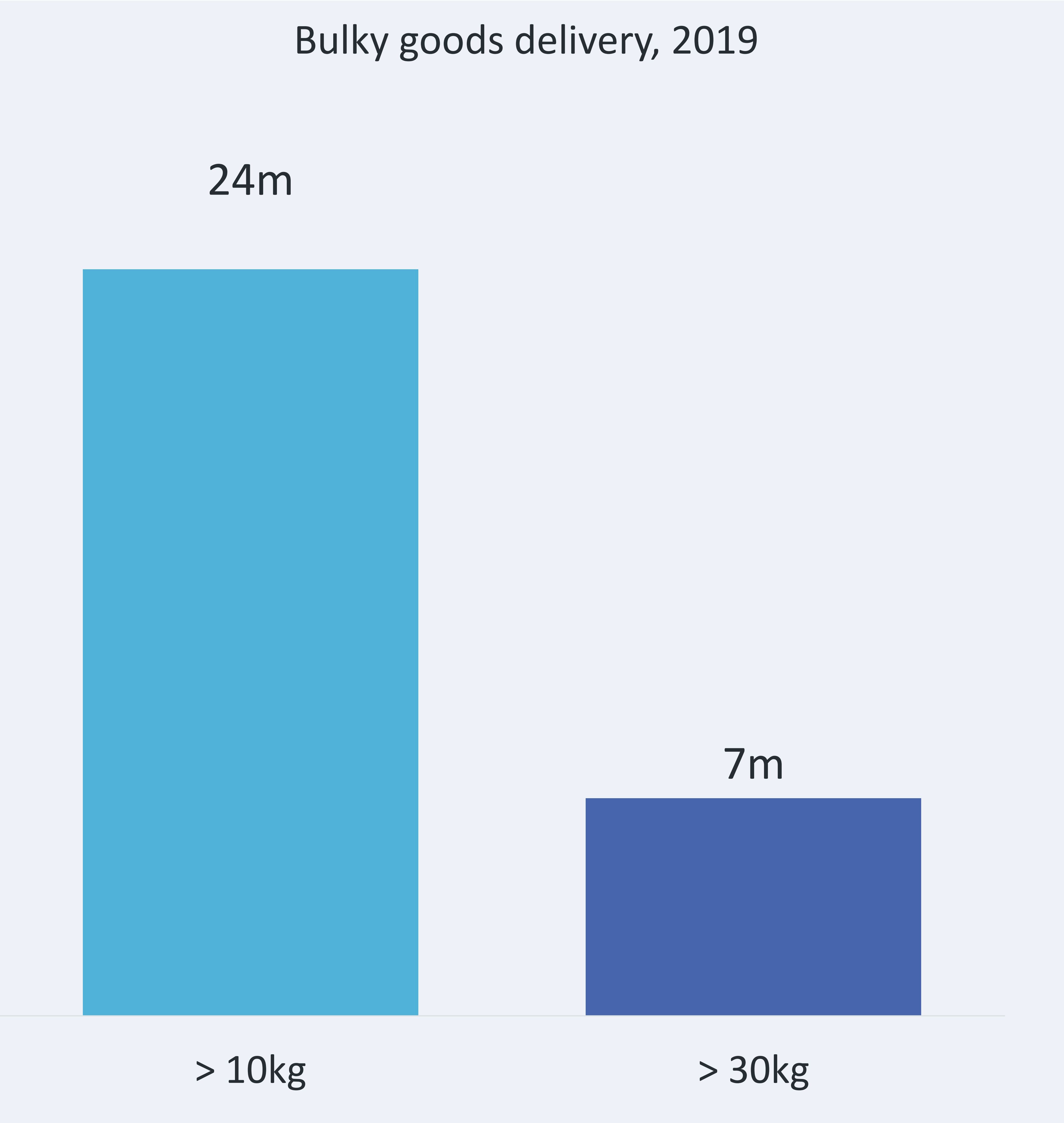
Source: Data Insight, Logistics for e-commerce, 2020: http://logistics.datainsight.ru/logistika-dlya-elektronnoy-torgovli

8 Bulky goods delivery: segment assessment and specifics

According to Data Insight, Russian stores shipped 24 million parcels heavier than 10 kg and 7 million parcels heavier than 30 kg in 2019.

Specifics of bulky goods delivery:

1. One of the main delivery methods, i.e. shipment to pick-up points and lockers, is not applicable to bulky items.
2. Bulky goods delivery is a complex service. Specific parts of the process are important, such as parking, unloading, lifting and carrying. This imposes additional requirements on all delivery participants.
3. Bulky goods delivery often includes extra services, such as removing old furniture and appliances, assembly, connection and disposal of packaging. Most customers currently make individual arrangements regarding these services with the seller.
4. For stores that cooperate with multiple transport companies, technical solutions enabling the optimal choice of partner for each specific shipment are becoming increasingly important.
5. Apart from being large and heavy, bulky cargo is also quite often high value. The stores must therefore provide insurance coverage for the transported goods and consider securing them against theft.



Source: Data Insight, Bulky Goods Delivery, 2020: http://logistics.datainsight.ru/content/Logistic_DI_KGT_2020

8 Bulky goods delivery: product categories

In addition to product categories with a significant share of bulky items, bulky parcels are largely comprised by major categories where even a small share corresponds to a high number of orders. For example, electronics (2% of bulky shipments), children's goods (7%), office supplies (2%).

Categories with the largest share of bulky parcels:

95% tires and discs

90% furniture

75% building and home renovation products

70% sports equipment

50% business equipment

Categories with the highest number of 10kg+ orders are listed. The number of items in many categories differs from the number of orders as bulky parcels often include multiple items.

Number of orders and items in top10 categories:

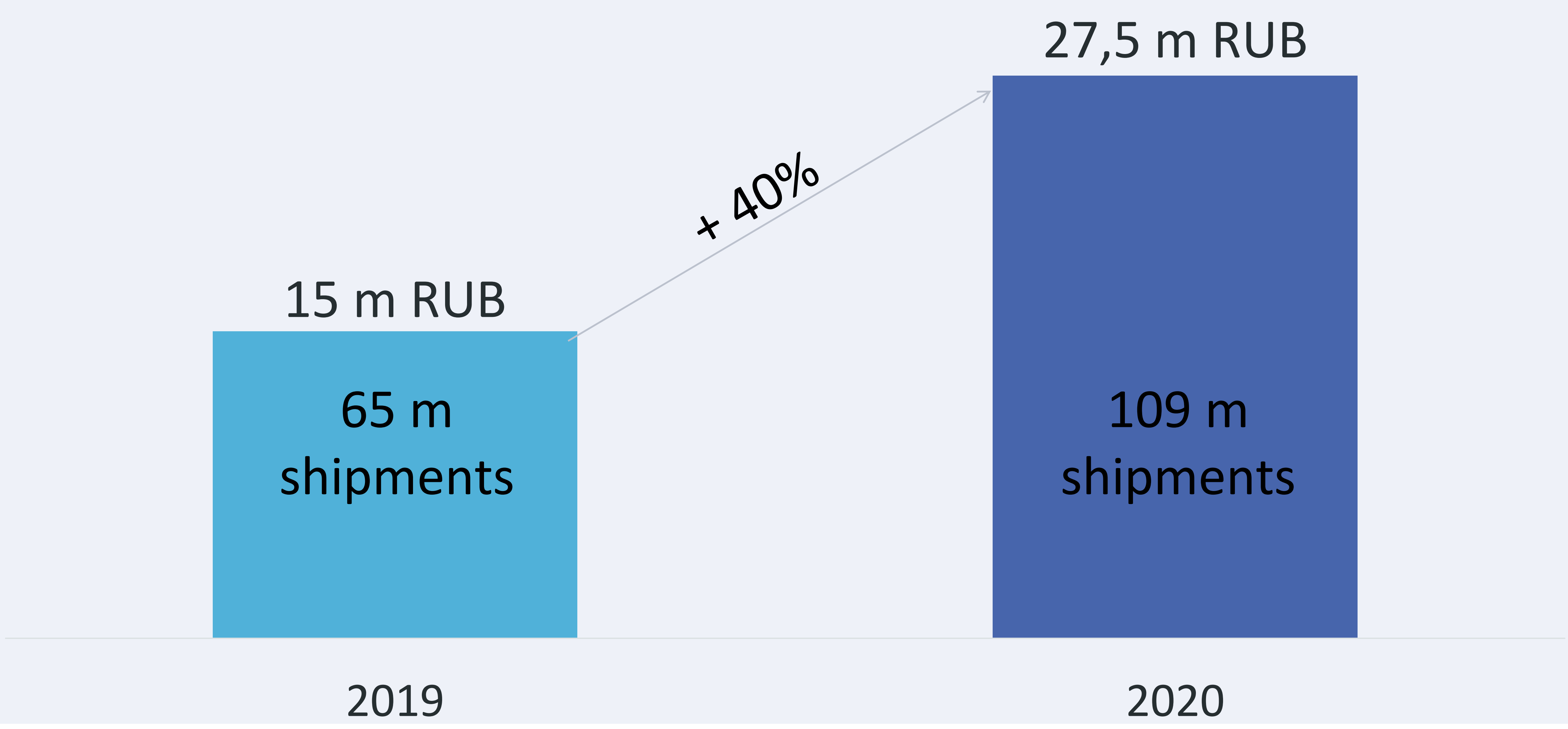
Product category	Number of 10kg+ orders per day	Share in overall 10kg+ parcels	Number of items
Auto parts	14,300	23%	21,450
Furniture	14,300	23%	57,200
Building and home renovation	10,700	17%	16,050
Tires and discs	6,000	10%	24,000
Tools	4,800	8%	4,800
Home electronics and appliances	3,000	5%	3,000
Children’s goods	2,900	5%	4,060

Source: Data Insight, Bulky Goods Delivery, 2020: http://logistics.datainsight.ru/content/Logistic_DI_KGT_2020

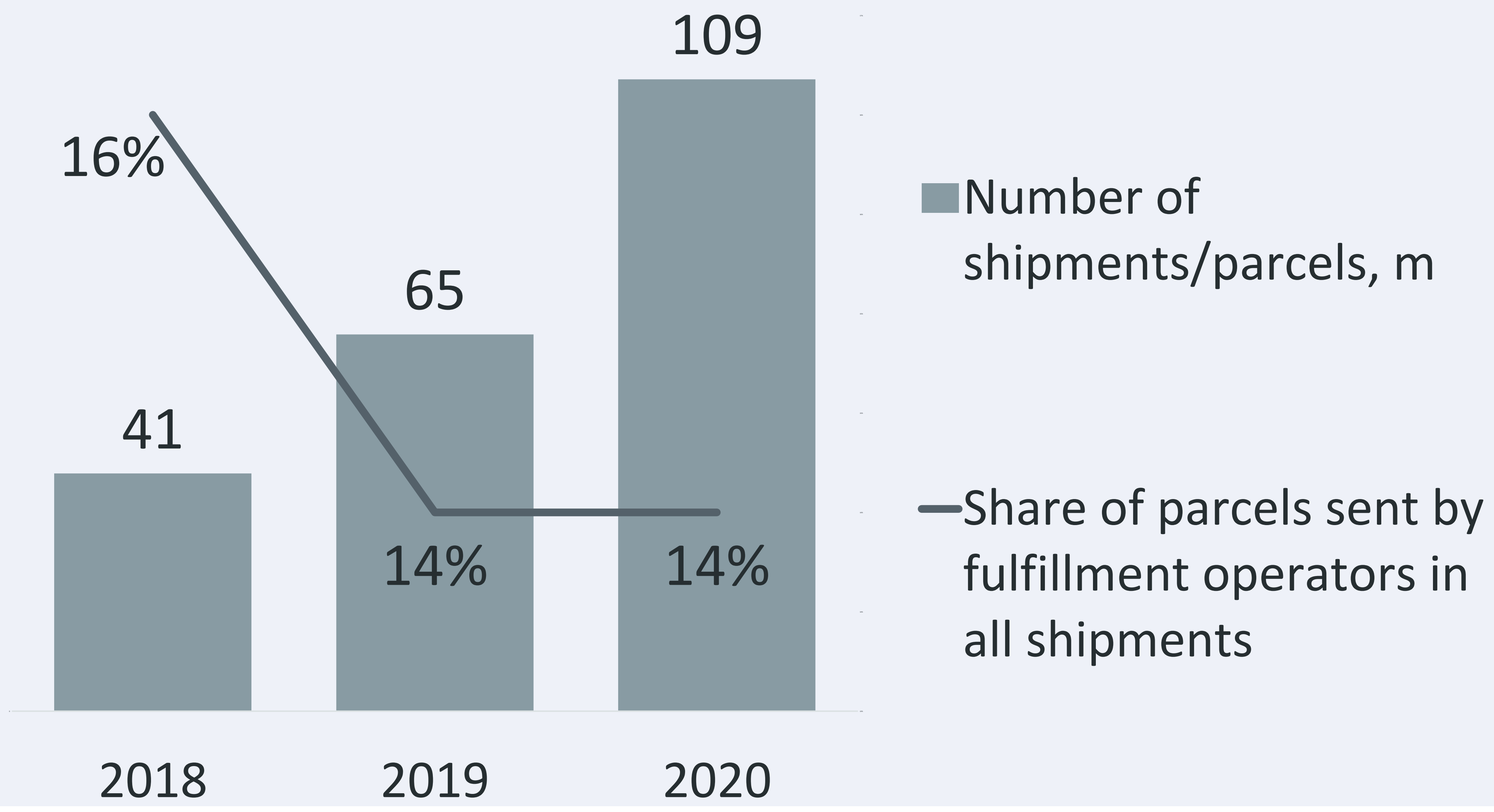
8 Fulfillment: overview, 2018-20

The estimated size of the fulfillment market in 2019 is RUB 15 billion (65 million shipments). Data Insight forecast for 2020 is RUB 27.5 billion (109 million shipments). 2020 demonstrated 40% growth vs 2019. The number of parcels changed by 165% over the past two years, showing 63% CAGR.

Fulfillment market estimate*



Change over 2 years

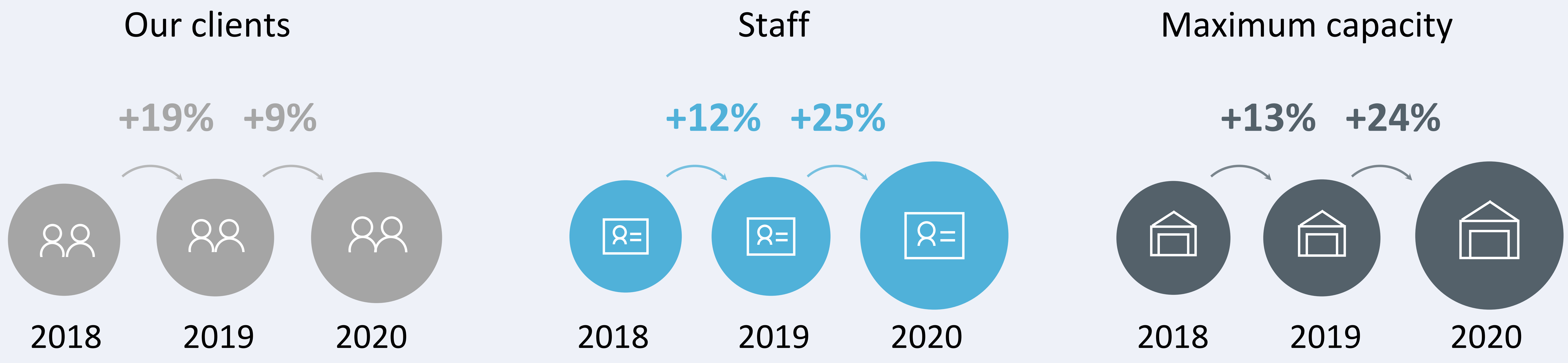


*Market valuation includes fulfillment services for online stores and fulfillment by store (FBS) model servicing marketplaces, where the goods are not stored at the marketplace warehouse. The valuation is exclusive of the marketplaces' own fulfillment capacities, whereby stores and manufacturers place their goods in the storage facilities of Beru (Yandex.Market), Ozon or Wildberries, because that model does not support sales via any other channels.

Source: Data Insight, Fulfillment for E-commerce, 2020, http://logistics.datainsight.ru/fulfilment-dlya-internet-torgovli-2020

8 Fulfillment: increase in the number of customers, employees, capacity

Maximum capacity (the number of orders that operators are able to ship per day) grew by 14% compared to 2019 due to the launch of new facilities and development of the existing ones. With the market growing by 40%, that implies a decrease in the capacity margin.



Source: Data Insight, Fulfillment for E-commerce, 2020, http://logistics.datainsight.ru/fulfilment-dlya-internet-torgovli-2020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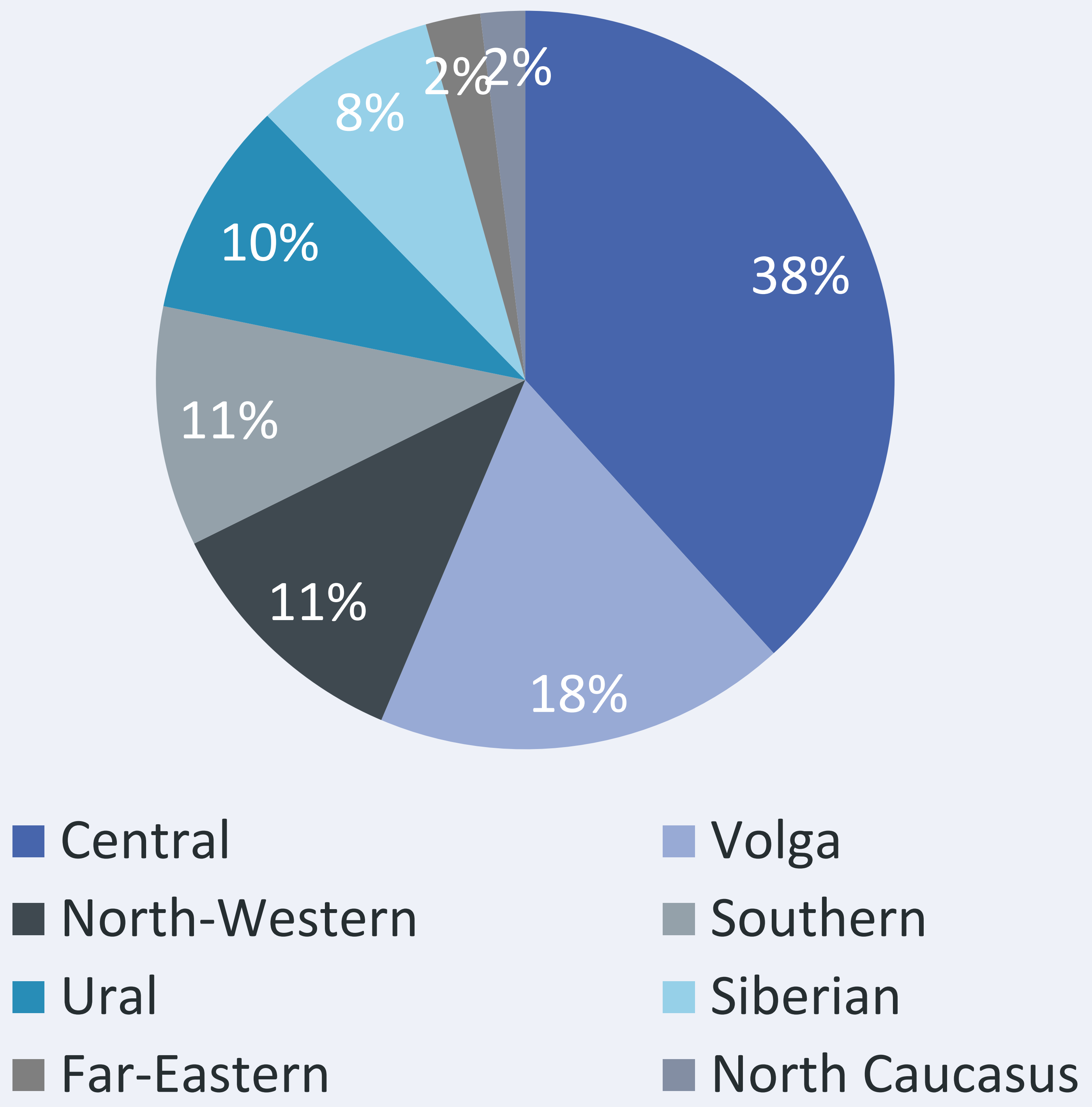
The geography of e-commerce

- Deliveries geography
- Online orders geography
- Online orders per resident
- Average delivery time in big cities
- Average shipping distance
- Deliveries geography: the biggest cities compared

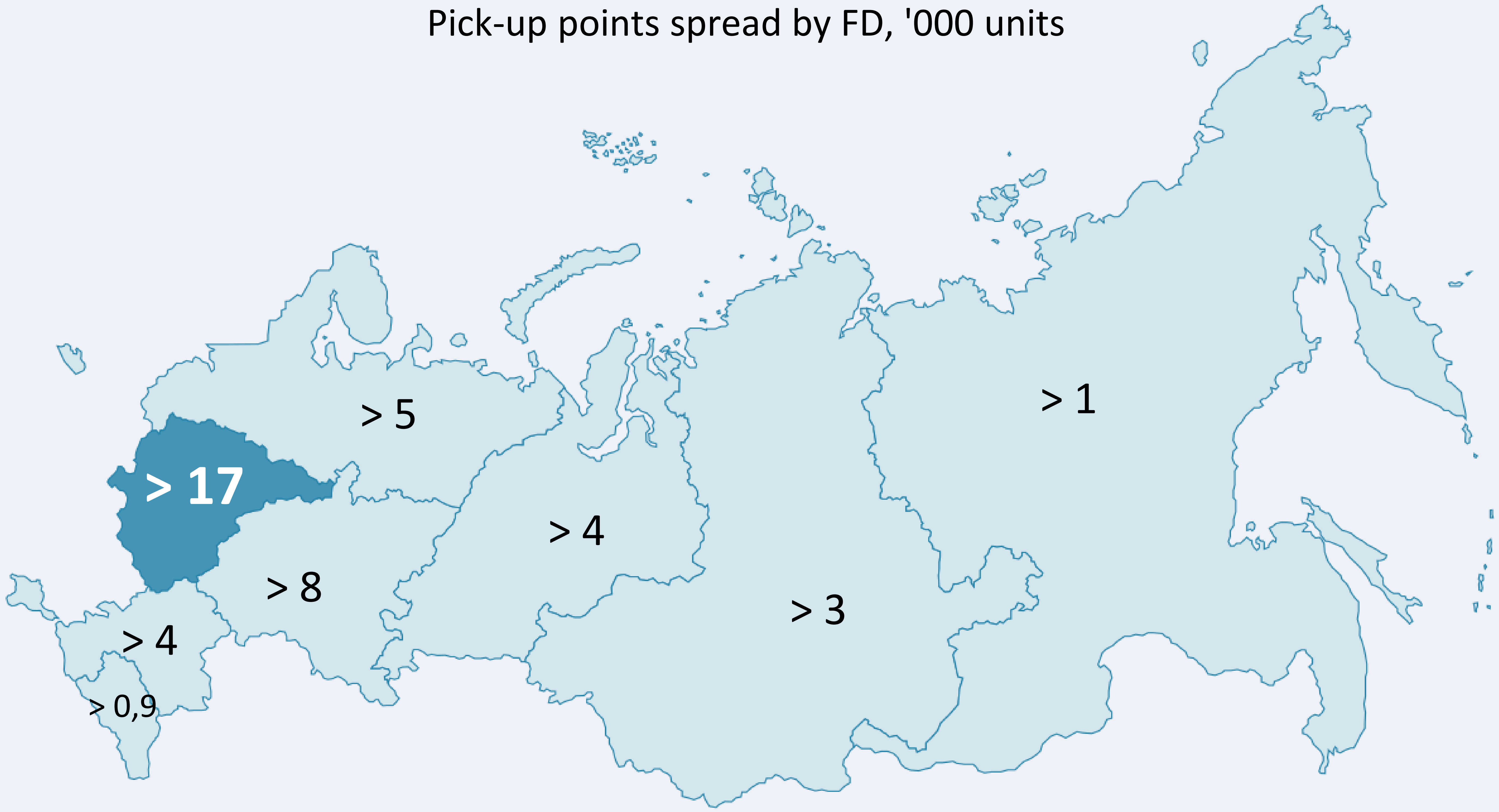
9 Deliveries geography: order distribution points by federal district of Russia

There are more than 46,000 order distribution points in Russia. Most of the pick-up points are located in Central Federal District, which accounts for more than 17,000 of them (38% of the total number).

Shares of pick-up points by federal district



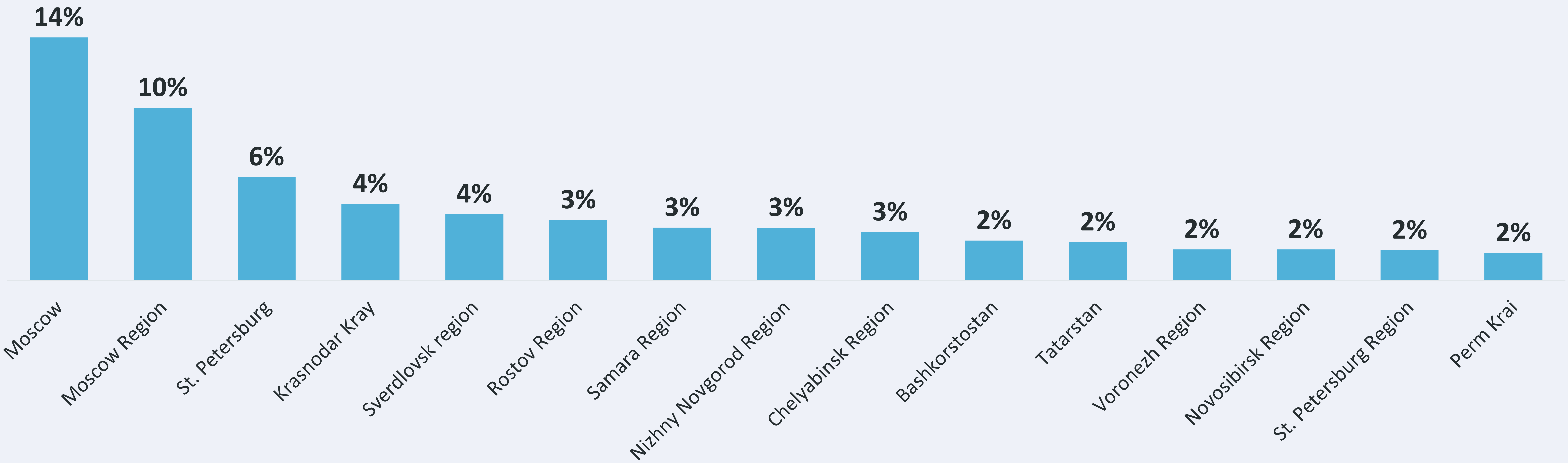
Pick-up points spread by FD, '000 units



Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, 2019: datainsight.ru/PP-DeliveryRussia2019

9 Deliveries geography: distribution by region, top15

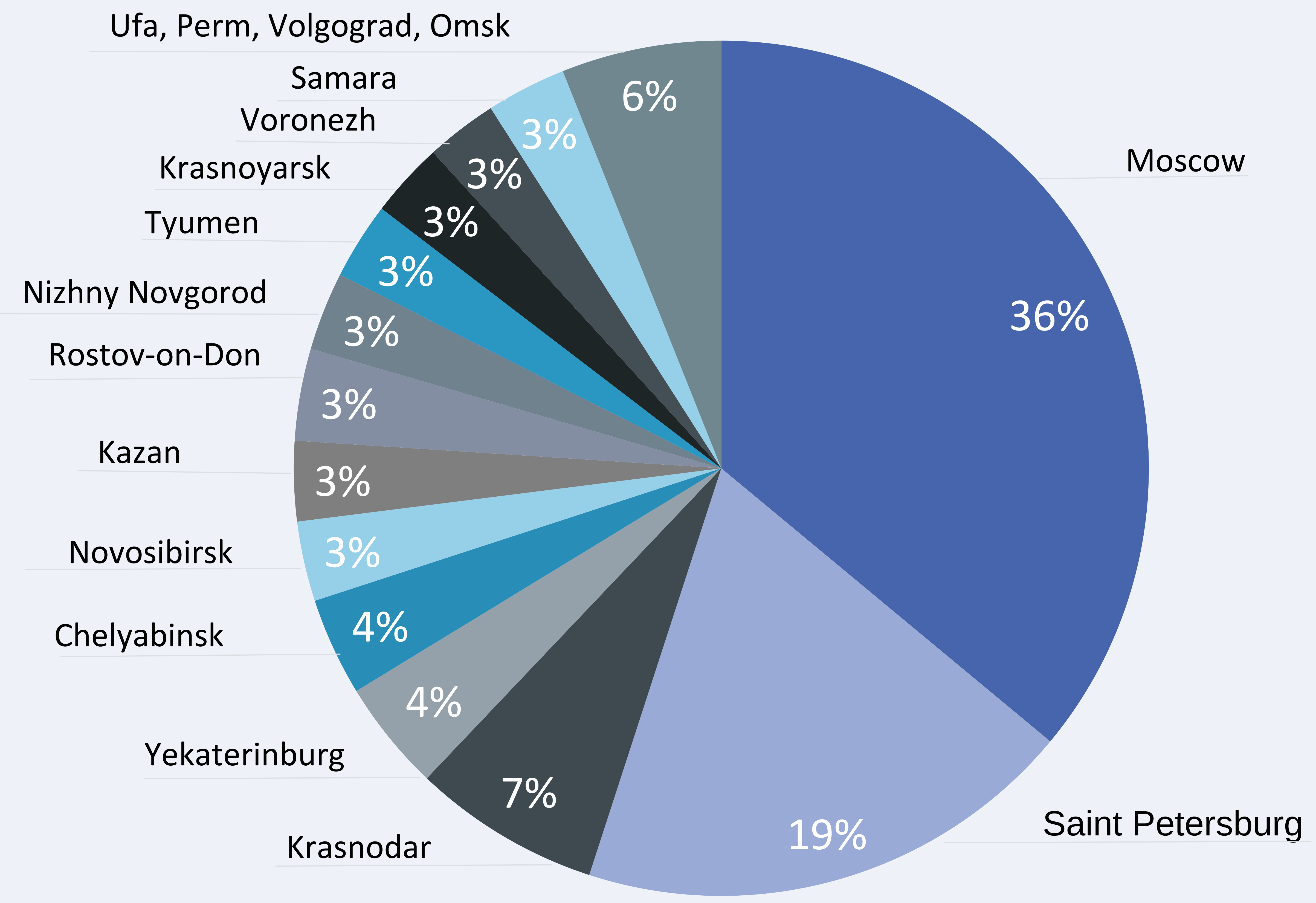
Top15 Russian regions account for 61% of all pick-up points. Moscow and Moscow Region are the leaders in the number of pick-up points, accounting for 24% of all pick-up points.



Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, 2019: datainsight.ru/PP-DeliveryRussia2019

9 Online orders geography, 2020

Online orders distribution by city



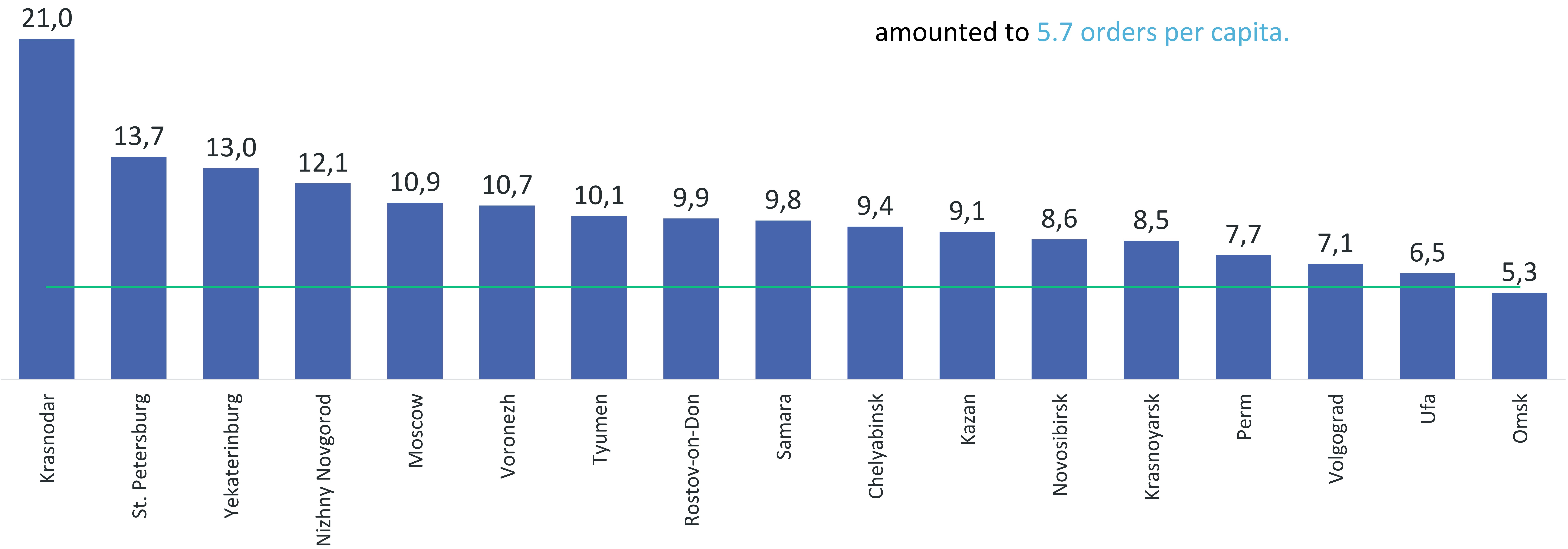
Fifteen 1m+ cities and two large cities (Tyumen and Krasnodar) account for the orders of **47.4%** of e-commerce goods. The overall number of orders made in medium-sized cities and small towns is only a few percent higher than the number of orders made in cities with 1m+ residents.

* Shares in all online orders placed in 2020

Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, 2019: datainsight.ru/PP-DeliveryRussia2019

9 Online orders per resident

Below are overall online orders per resident (including retirees and children) in 2020. The national average amounted to 5.7 orders per capita.



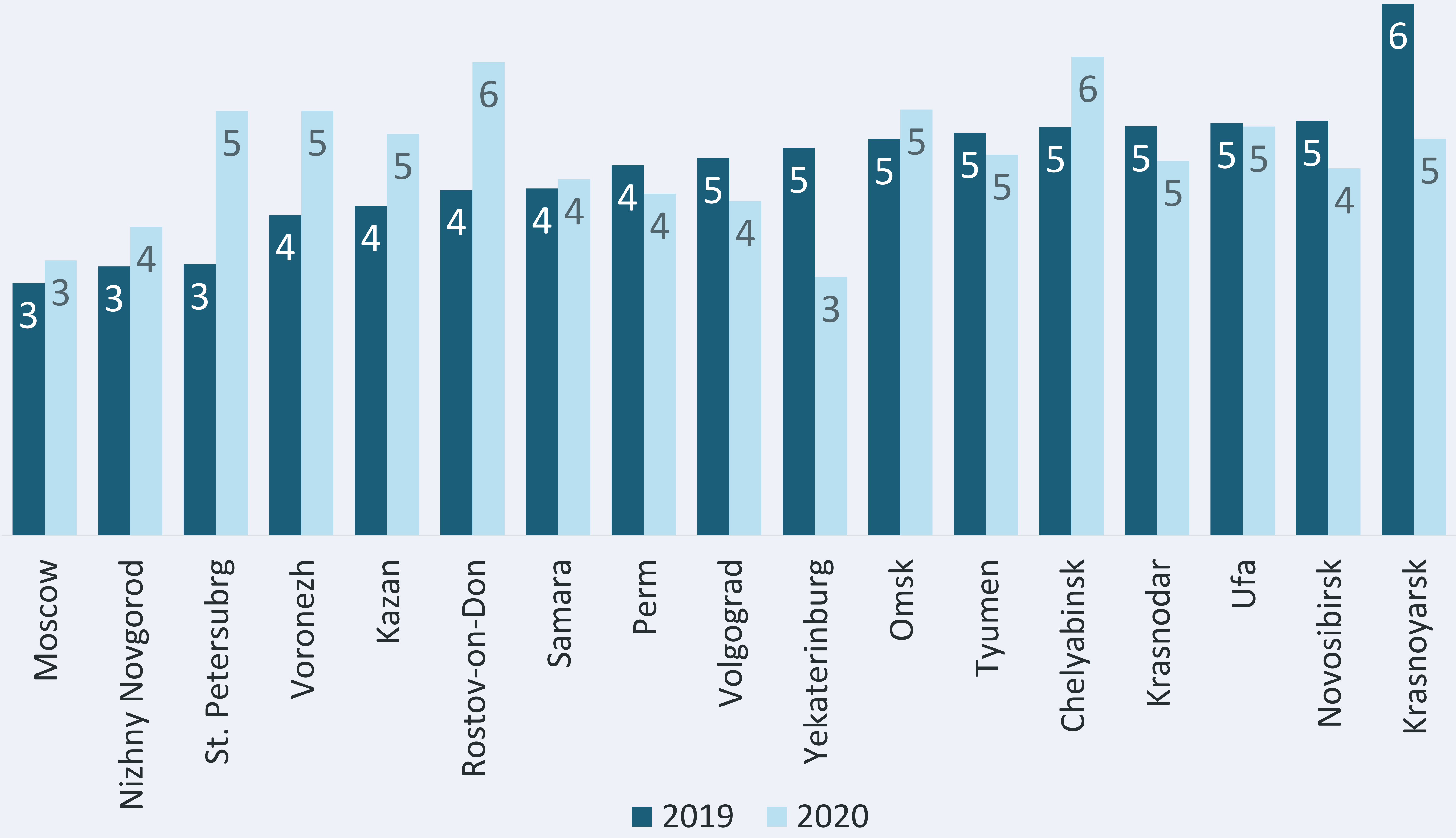
The data represents orders made in 2019H2 – 2020H1.
Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, 2019: datainsight.ru/PP-DeliveryRussia2019

9 Average delivery time in big cities

In the first half of 2020, an **increase in delivery time** compared to 2019 was recorded.

The number of orders picked up due to the mandatory self-isolation policy and increased the logistics operators' workload.

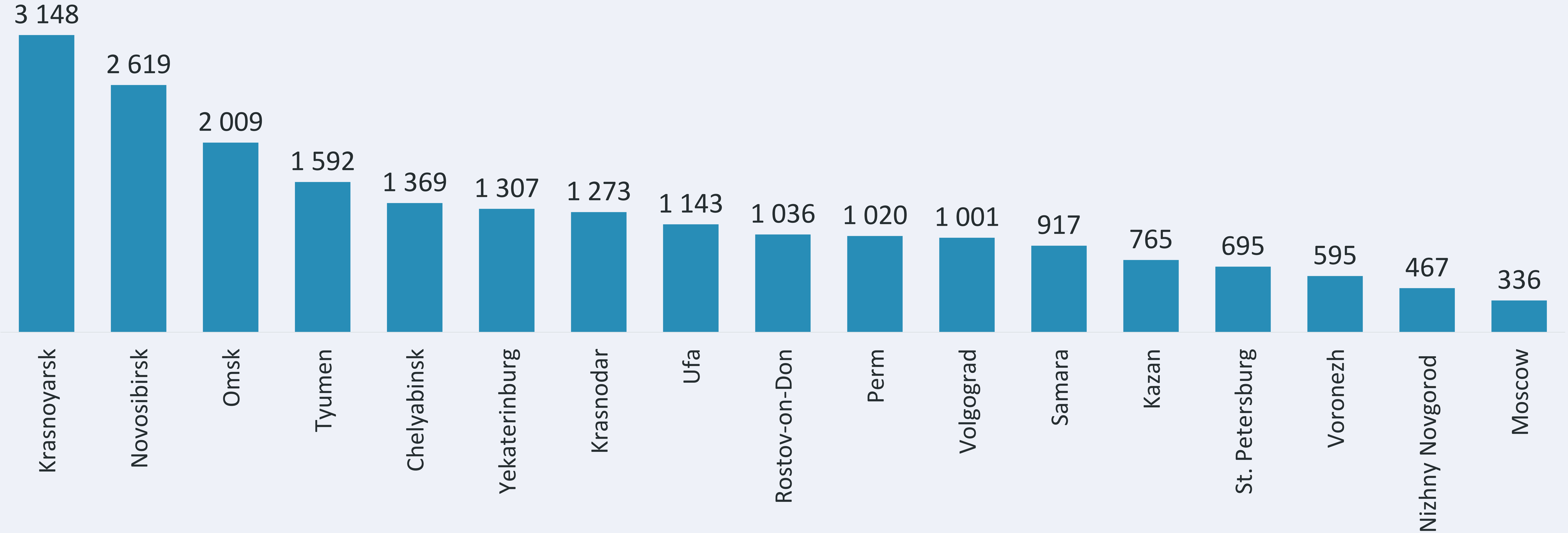
The average delivery time was 4 days in 2019 but rose to **almost 5 days** in the first half of 2020.



Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, 2019: datainsight.ru/PP-DeliveryRussia2019

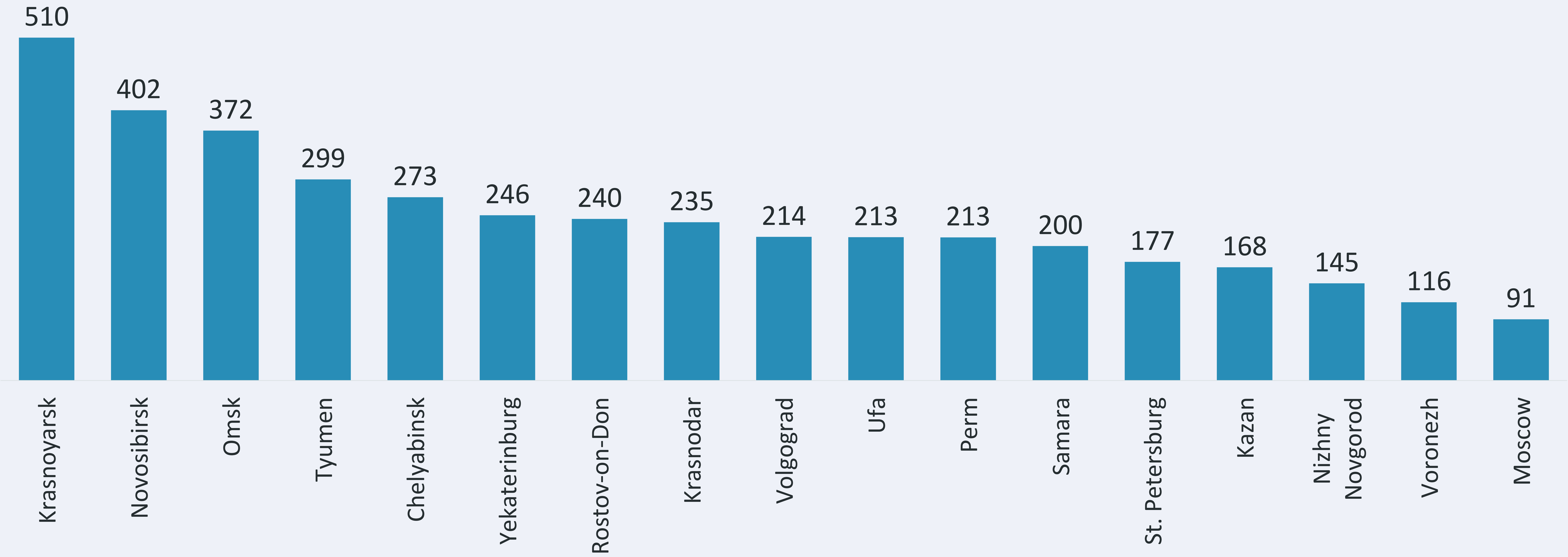
9 Average shipping distance (km)

The longest shipping distance is covered by orders delivered from Siberia, while parcels received by customers in central Russia travel the shortest distances. Orders delivered to Siberia cover **3 times longer average distance** than orders shipped to cities in the central part of Russia.



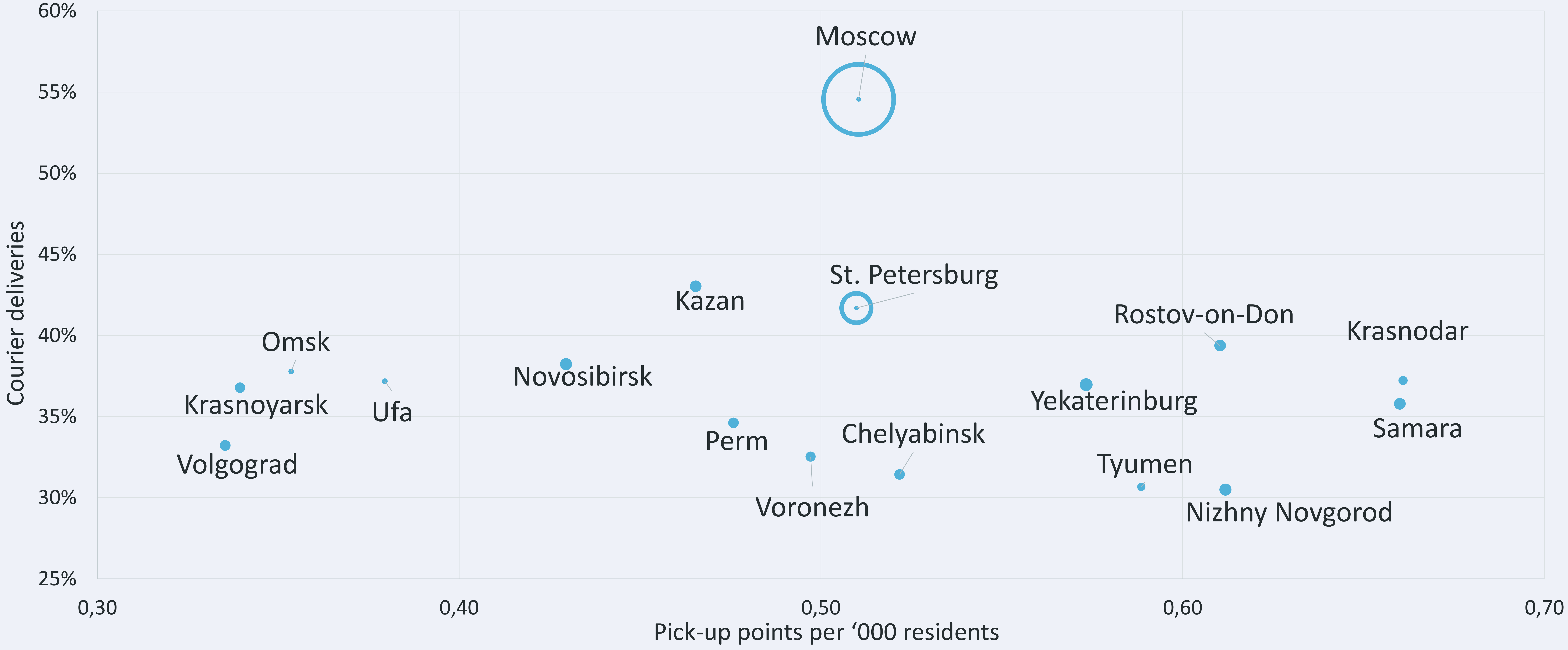
9 Shipping distance per order per day (km)

Orders shipped to Eastern Siberia cover **5 times longer daily distance** than orders made by customers in the European part of Russia



Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, 2019: datainsight.ru/PP-DeliveryRussia2019

Deliveries geography: major cities compared



The circle size is proportional to the city population.

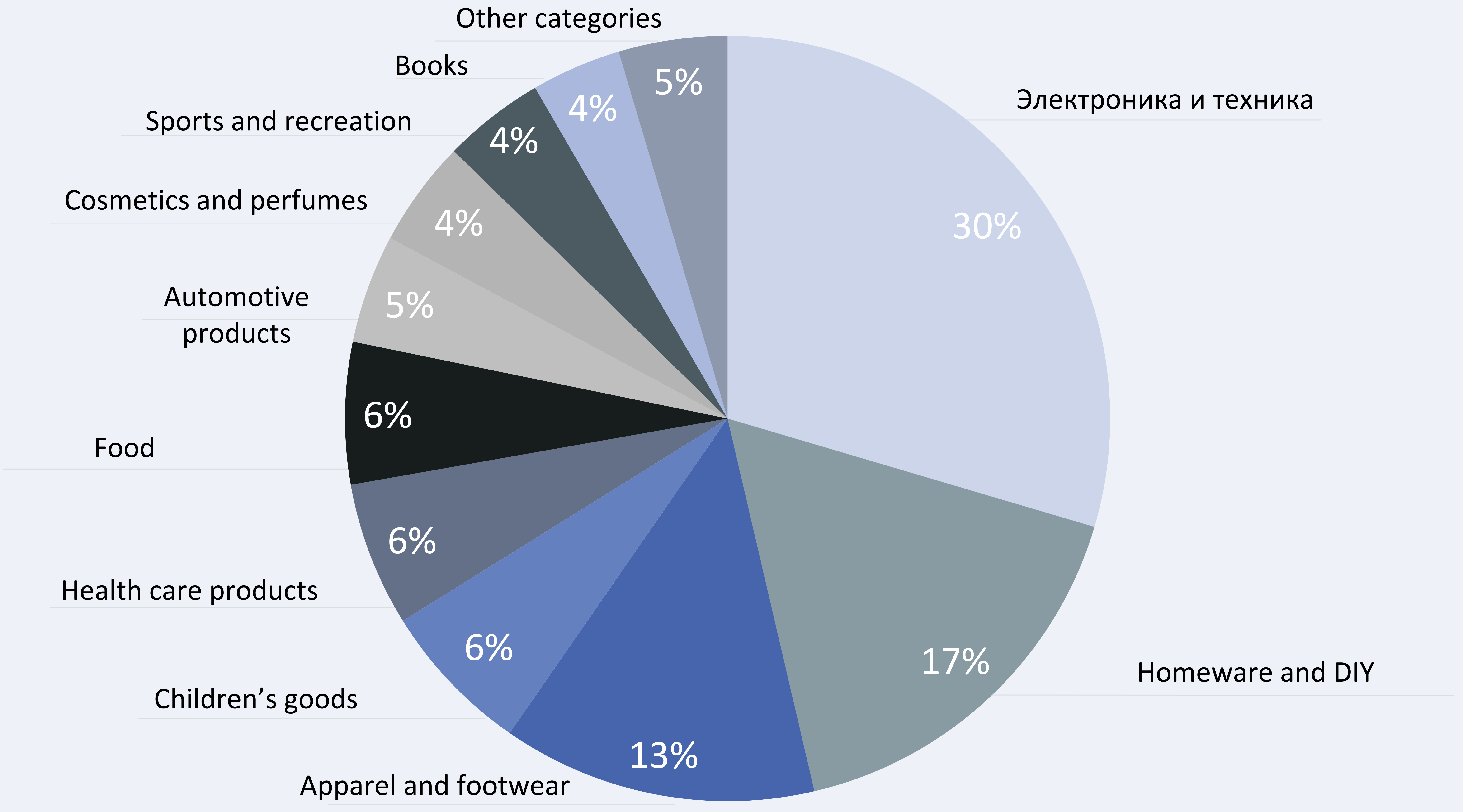
Source: Data Insight in collaboration with PIMSolutions, The Geography of Online Store Deliveries, , 2019: datainsight.ru/PP-DeliveryRussia2019

Online stores

- Number of stores by product category
- Changes in the structure of Top 1,000 Russian online stores
- Traffic sources by product category
- Omni-channel performance rating of Russian retailers

10 Number of stores by product category

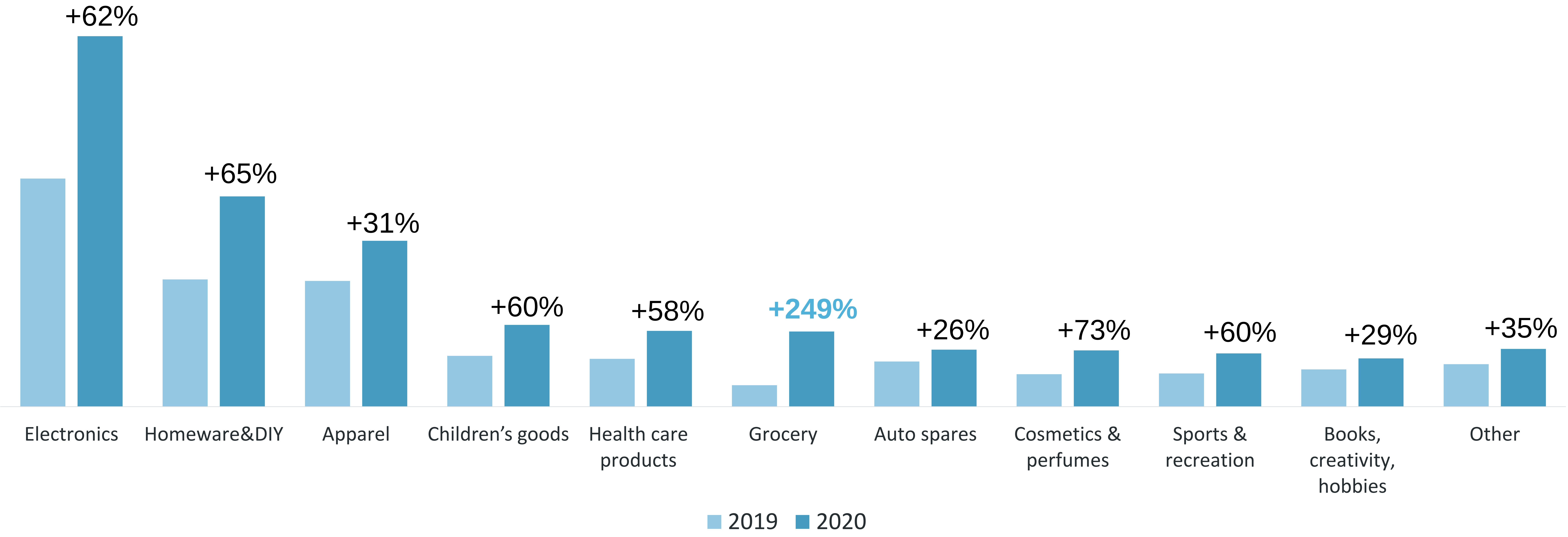
Top1,000 Russian online stores: revenue share by category



Source: Data Insight, March 2021

10 Changes in the structure of Top 1,000 Russian online stores, 2019-20

A 249% spike was observed in the food category in 2020, which demonstrated the highest annual growth.



Data on Top1,000 online stores in Russia

Source: Data Insight, March 2021

10 Traffic sources by product category

Online bookstores are the most dependent on organic search traffic, while the share of direct traffic is the highest in general-scope stores and food stores.

Share of traffic sources in online stores by product category

Category	Organic search	Direct traffic	Links	Paid search	Email	Social media	Display advertising
DIY	44%	19%	15%	10%	5%	3%	3%
Automotive products	47%	28%	8%	9%	4%	2%	2%
Home appliances and electronics	39%	21%	**29%**	5%	2%	2%	2%
Children's goods	38%	16%	8%	8%	5%	4%	2%
Pet supplies	42%	26%	9%	**12%**	**8%**	2%	2%
Online pharmacies	**56%**	29%	7%	2%	1%	3%	1%
Books	51%	20%	20%	2%	2%	4%	1%
Food	33%	**31%**	10%	10%	7%	4%	4%
Sports goods	43%	24%	6%	10%	5%	**5%**	4%
Jewelry	39%	20%	15%	10%	5%	4%	**7%**

The average traffic sources structure in online stores of specific product categories is calculated as the arithmetic mean, regardless of the "weight" of individual stores based on the number of visits or orders. The calculation is based on Top 1,000 Russian online stores
Source: Data Insight, based on SimilarWeb data, 2020

Omni-channel performance rating of Russian retailers

Data Insight and AWG scrutinized the omni-channel performance of the major Russian retailers. We assessed the **seamlessness of customer experience**, regardless of the channel via which the purchase is made, e.g., brick-and-mortar store, website, mobile app or customer support staff (call center, etc.).

Overall rating winner

M.Video

Specific rating winners

Customer experience rating	Technology interaction rating	Order receipt experience rating
Sportmaster	**Detsky Mir**	**Perekrestok**

The rating was based on the following data:

data obtained using the mystery shopper method;

AWS and Data Insight estimates based on accumulated data and/or data obtained using proprietary technology solutions;

Online stores' data on delivery options and times, product descriptions and online sales;

data on mobile application ratings and number of downloads, downtime and web performance provided by third-party services.

Source: Data Insight in collaboration with AWG, Omni-channel performance of major Russian retailers through the eyes of the customer, 2020: https://omni.datainsight.ru/en

10 / Omni-channel performance rating: Top 10

№	Company	Website	Category	Overall rating	Customer experience rating	Technology interaction rating	Order receipt experience rating
1	**M.Video**	mvideo.ru	Home electronics and appliances	**26.88**	8.13	12.75	4.0
2	**Adidas**	adidas.ru	Sports goods	**26.68**	6.58	13.35	5.3
3	**Vseinstrumenti.ru**	vseinstrumenti.ru	Homeware and DIY	**26.48**	6.50	12.35	5.6
4	**Sportmaster**	sportmaster.ru	Sports goods	**26.17**	8.79	11.75	4.1
5	**Petrovich**	petrovich.ru	Homeware and DIY	**26.13**	8.25	11.50	4.4
6	**Re-Store**	re-store.ru	Home electronics and appliances	**26.11**	7.86	11.25	5.5
7	**DNS**	dns-shop.ru	Home electronics and appliances	**25.80**	8.13	11.05	4.6
8	**SUNLIGHT**	Sunlight.net	Jewelery, watches	**25.40**	7.65	12.00	4.8
9	**Komus**	komus.ru	Office supplies	**24.89**	8.29	12.35	2.8
10	**Perekrestok**	vprok.ru	Food	**24.82**	8.17	9.15	6.0

Source: Data Insight in collaboration with AWG, Omni-channel performance of major Russian retailers through the eyes of the customer, 2020: https://omni.datainsight.ru/en

Online payments in e-commerce

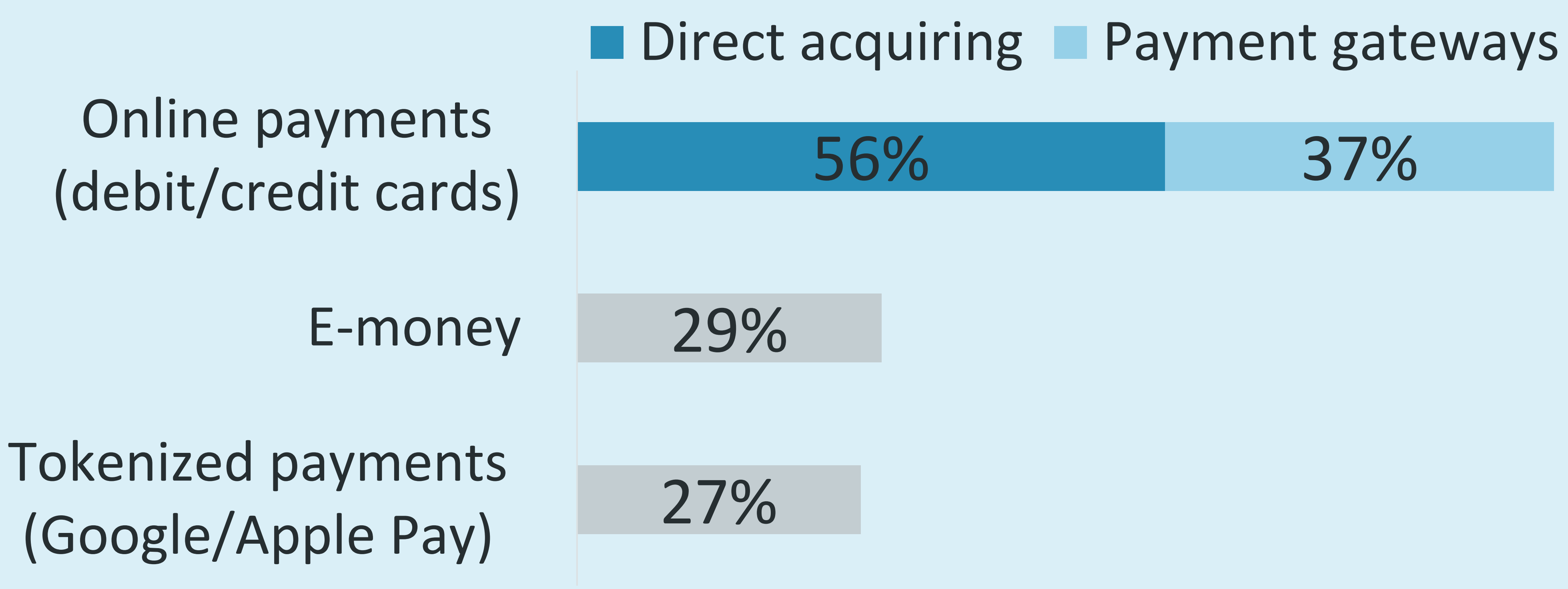
- Payment methods in e-commerce
- Online payment growth drivers
- Online payments: customer experience
- Structure of payments by segment
- Provider selection: business priorities
- Crucial payment options for business

11 Payment methods in e-commerce

Business experience

Most businesses implement credit/debit card payment via **direct acquiring (56%) or payment gateways (37%).** E-money and tokenized payment methods are also popular.

Types of connected payments



Customer experience

91% of customers pay with a credit/debit card online (when making an order on the website or in the app).

77% of customers pay in cash upon receipt.

66% of customers pay with a credit/debit card offline, i.e. upon receipt.

Other payment methods, which account for **less than 50% of the responses**, include payments via a bank transfer, e-wallet, mobile money, payment terminal, quick payment system, cryptocurrency.

Source: Data Insight in collaboration with RBK. money, Online payments through the eyes of the customer, 2020: datainsight.ru/sites/default/files/DI_RBKMoney_OnlinePayments2020.pdf

11 Structure of payments by segment

Online credit/debit card payments play a leading role in practically every segment.

The most prominent segments are ticket purchases, online education, borrowings, subscription-based services and cellular services.

Source: Data Insight in collaboration with RBK.money, 2020 Online payments through the eyesof the customer, https://datainsight.ru/sites/default/files/DI_RBKMoney_OnlinePayments2020.pdf,2020

RBK. money

DATA insight

11 Online payments: customer experience

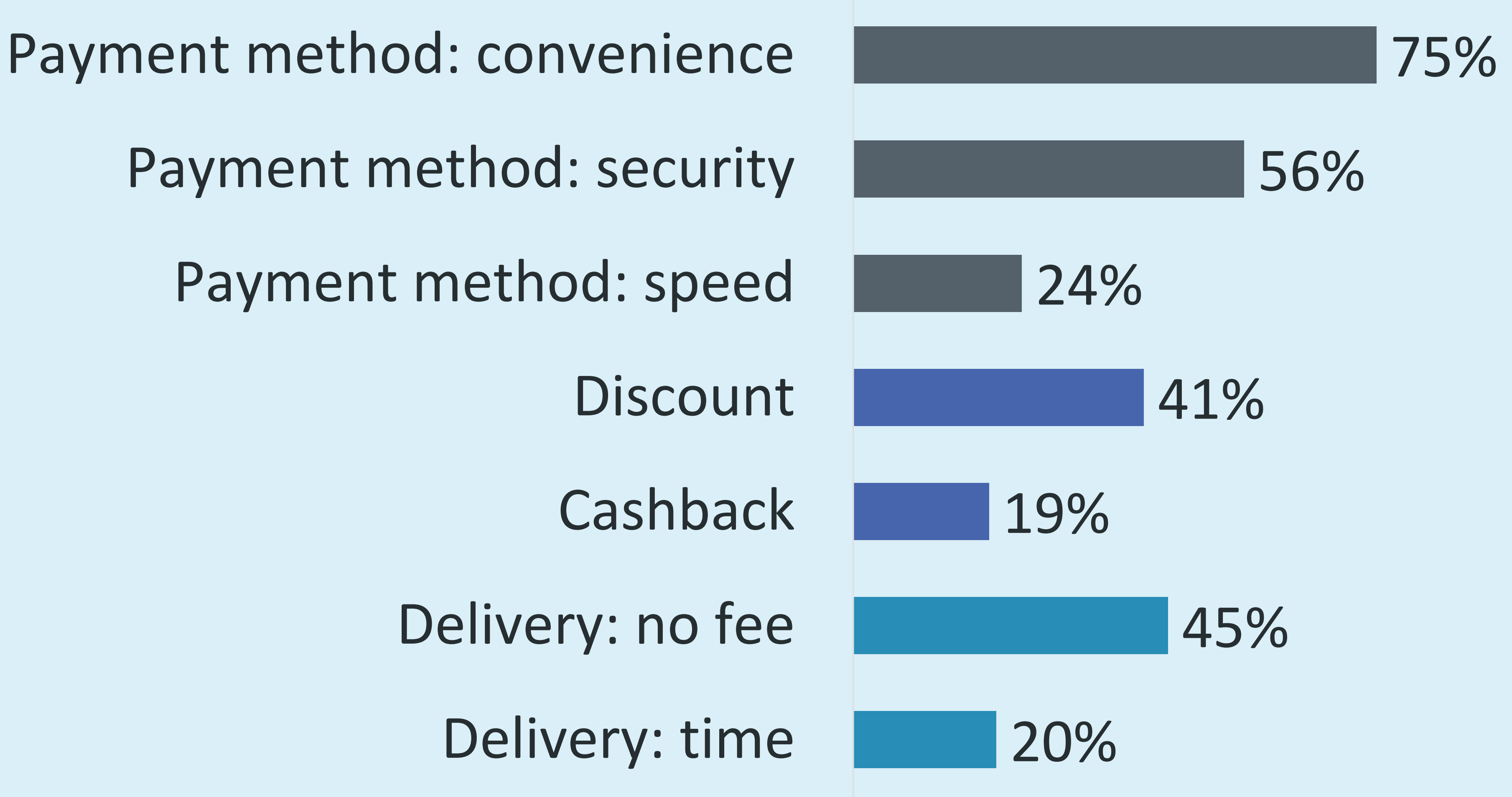
When choosing a payment method, almost **80% of customers look at the payment fee**; 25% of them describe it as the first key factor they consider when making a purchase. When making a purchase decision, most buyers (75%) look at the convenience of payment.

When choosing a payment method, customers pay attention to:

	Primary factors	Secondary factors
Payment fee	25%	53%
Data protection	21%	43%
Easy top-up	17%	38%
Transaction speed	14%	41%
Number of actions	7%	23%

Data protection is important for 64% of customers: 41% of them have a purchase amount in mind that they would not exceed for security reasons

When making purchase decisions, customers pay attention to:



Payment convenience and payment method security affect the purchase decision **more** than discounts or free shipping.

Report partners

About eWave

eWave is the leading global independant commerce innovator, founded in 2009 with over 280 professionals. The company provides B2C and B2B businesses with the broad range of services in e-commerce and digital transformation.

As an award-winning partner of enterprise class platforms: Salesforce Commerce Cloud, Adobe Magento Commerce, and other API first, Headless Commerce surround solutions, eWave helps clients create competitive advantage with commerce@core.

eWave’s unique methodology (the eWave Way) combines: customer experience; channel ecosystems, credentialed commerce capability, change consulting, customised care and cloud capacity with relentless business innovation.

With an expanding client base including Nike, Canon, L'Oréal and Kathmandu, Rip Curl and more, eWave is trusted by world-class brands serviced by teams across more than 18 cities around the globe, founded and headquartered in Sydney, Australia.

ewave.com/ru ewave.com

About Get4click

Marketing platform **Get4click** is an affiliate network with an unusual approach.

Marketing platform Get4click is an affiliate network with an unusual approach.
Using a unique referral program we really increase sales and bring a high quality clients for our ecommerce clients. Our another key strength is that we work on a partnership network basis.
Get4click is highly converting. For more than 8 years our loyalty program has been remaining demanded and highly attractive for users.
Over the past year, we have grown x5 (!) in 2020 and continue to actively develop together with Ecommerce, new brands have joined us: SDEK, Detmir, OFD platforms, Sbermarket, Samsung, Profi, Metro and many others - in total we now have more than 130 clients.
In addition to high-conversion traffic from brands, the service has a unique traffic from OFD cash register receipts. Now we are working with five partners: Platform OFD, Pervaya OFD, Taxicom, Tarus and OFD.ru.
This year the service won "Big Turnover-2020" in the category "Traffic and Lead Generation"
Achievements over the past year:

1. Traffic and orders – x5 growth
2. Clients - x2 growth
3. Average check - more than 10% growth
4. Conversion from visits to purchases - more than 73% growth

get4click.ru

About PickPoint

PickPoint is a full-cycle logistics service provider for online order delivery.

At the beginning of 2021, the last mile of PickPoint includes 13,500 lockers and pick-up points. The PickPoint network provides online shoppers with a full range of contactless services for receiving orders and making payments, as well as returning products that did not fit. In December 2020, PickPoint launched PickPoint Box C2C service, which allows individuals and small businesses to send their parcels via lockers across the country. Its user base is estimated at 13,5 million people.

More than 10,000 online retailers are connected to PickPoint. PickPoint is a pioneer of the Russian postamat market who installed the country's first unit in 2010.

About PONY EXPRESS

PONY EXPRESS – universal logistics operator.

For over 28 years, the company has successfully implemented projects in postal services, express delivery, cargo transportation, and warehouse logistics. While actively developing cross-border and multi-modal areas, the company specializes in creating industrial solutions for different economy sectors.

Today, the company serves more than 40,000 localities in more than 220 countries and territories around the world.

PONY EXPRESS infrastructure includes 138 express centers (the company's own branches and representative offices). More than 7,000 partners' give away points and postamats are available to customers.

The total area of logistic terminals and warehouses is 77,600 sq. m.

The company's car fleet includes more than 1,300 vehicles.

The company has more than 4,000 employees.

The company handles over 11 million shipments annually.

About Yandex.Routing

Yandex.Routing — is a system for planning optimal routes and monitoring their implementation in real time.

Who benefits?

- Companies that develop their own logistics and want to make it cheaper, more transparent, and higher quality.
- FMCG manufacturers, retail and online traders, transport companies, and courier services.

For SMB and Enterprise:

- It's even useful for small delivery volumes: a separate interface is available and special rates are provided for small businesses.
- Large companies can take advantage of the API with detailed documentation and ability to embed the routing process in their internal systems.

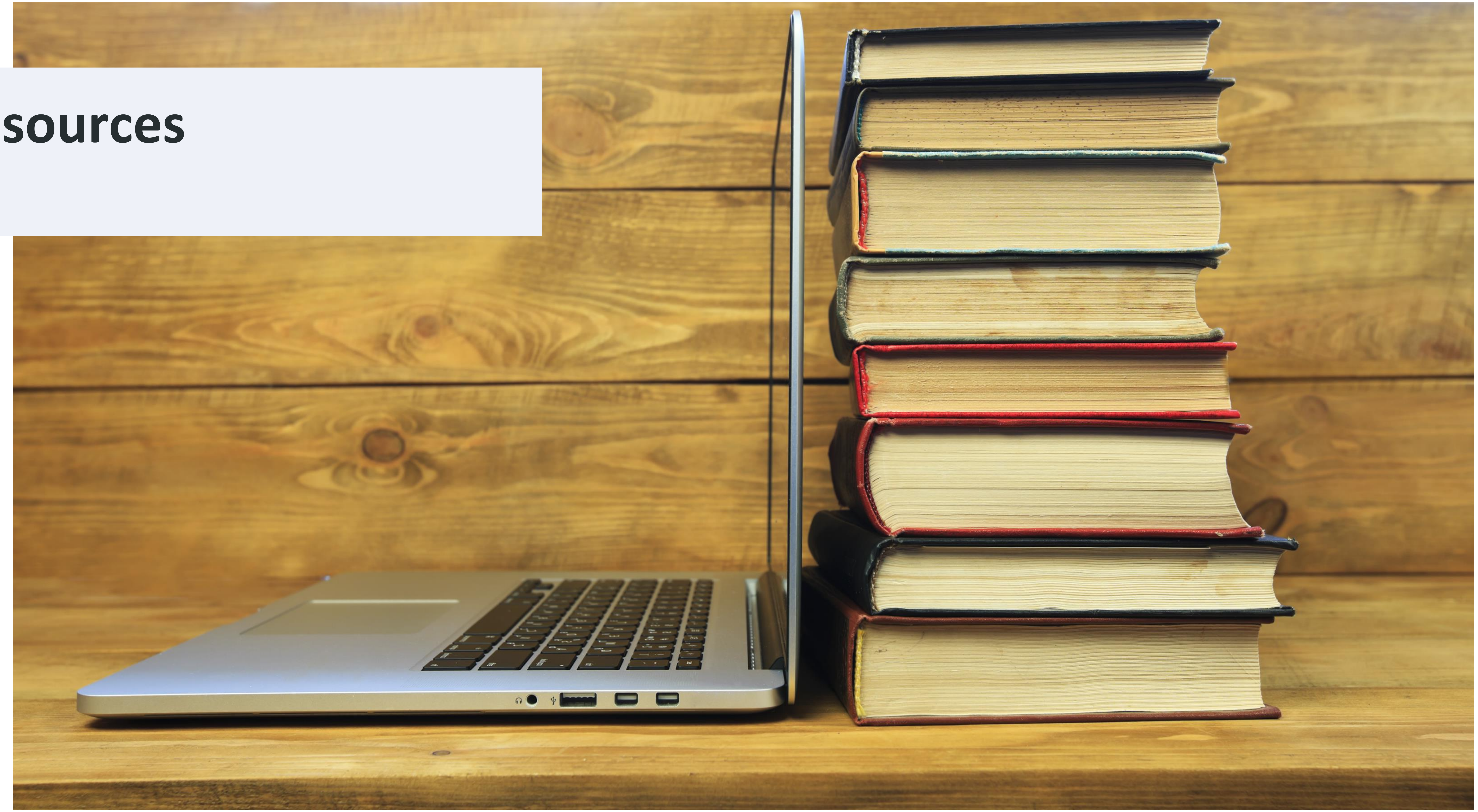
Yandex.Routing lets you:

- Quickly plan routes.
- Efficiently use resources.
- Improve customer service.
- Monitor order fulfillment.
- Simplify work for couriers and drivers.

It's easy to register and try. The first 14 days are free.

yandex.ru/courier

Data sources



Data Insight research and data:

- Data Insight in collaboration with Avito, C2C on the Russian Internet: E-commerce of Individuals, 2020;
- Data Insight in collaboration with eBay, Online retail exports, 2020;
- Data Insight in collaboration with PimSolutions, Geography of online store deliveries, 2019;
- Data Insight database on Russian online stores;
- Data Insight, Logistics for e-commerce, 2020;
- Data Insight in collaboration with Delivery Club, The value of delivery in the restaurant business, 2020;
- Data Insight in collaboration with Ozon, Millennials in Business, 2020
- Data Insight in collaboration with AWG, Omni-channel performance of major Russian retailers through the eyes of the customer, 2020;
- Data Insight in collaboration with RBK.money, Online payments in e-commerce through the eyes of online business, 2020;
- Data Insight in collaboration with RBK.money, Online payments through the eyes of the online business, 2020;

External sources:

- The World Bank, 2020;
- International Telecommunication Union (ITU), 2020;
- Accenture report on Cross-Border E-Commerce, 2020;
- Mediascope, The Internet Audience, 2020;
- Mediascope: WEB-Index, 2020
- Statista, 2020;
- Ecommerce Foundation, country profiles, 2020;

Data Insight

Commercial research and projects

Market research

- Market sizing
- Key players and their shares
- Market structure
- Key market trends and development barriers

Competitive analysis

- Key competitors: size, market share
- Assortment analysis
- Key stengths and weaknesses

Buyer research

- Consumer behavior analysis
- Buyer persona (socio-demographic characteristics)
- Drivers and barriers to the selection, purchase and use of goods/services

Consulting

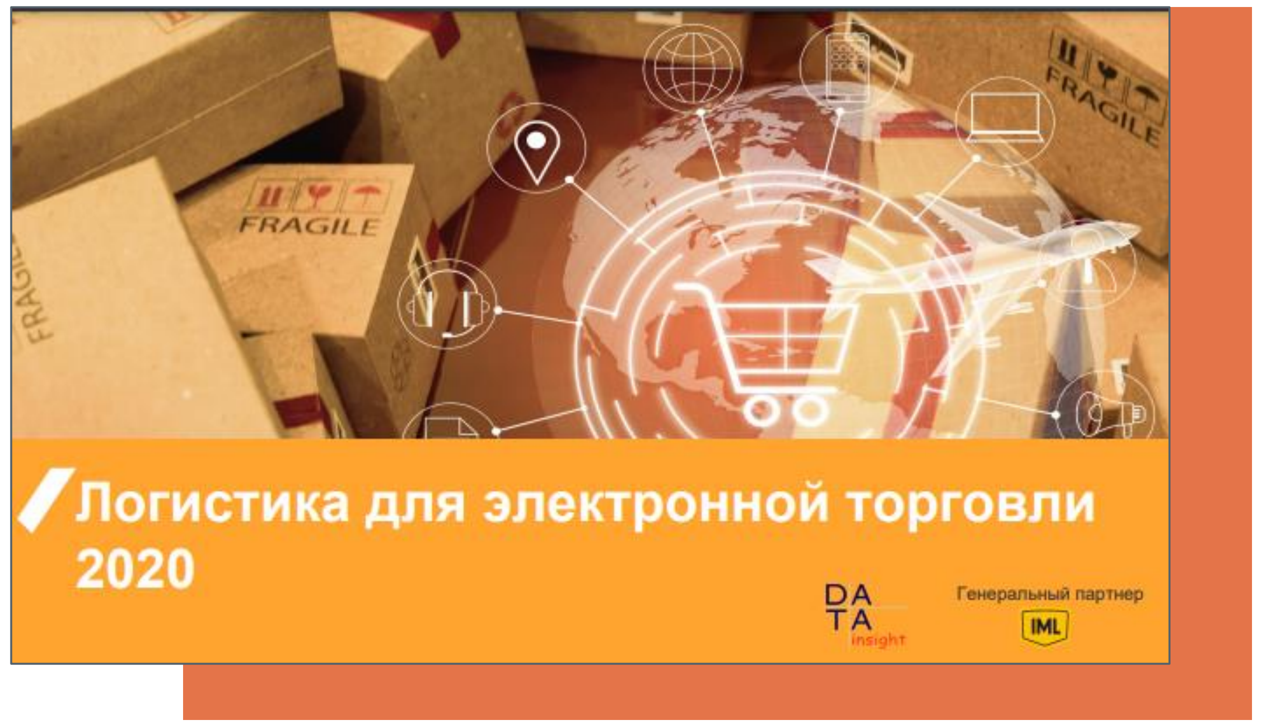
- Strategy consulting. Development strategy design
- Marketing consulting
- Overview of market conditions
- Analysis of the client's business needs

Public research

Online payments in e-commerce through the eyes of online business

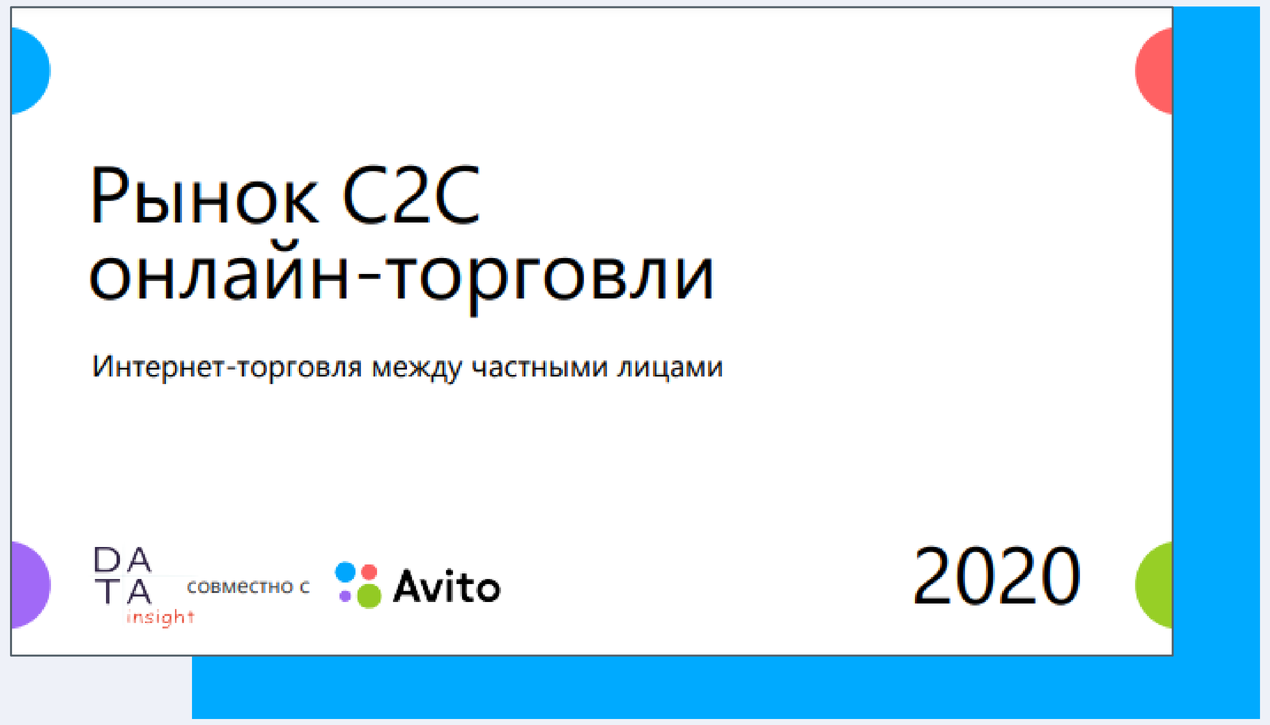
Marketplace Ecosystem: Ozon, 2020

IAB Russia Digital Advertisers Barometer, 2020



Logistics for e-commerce, 2020

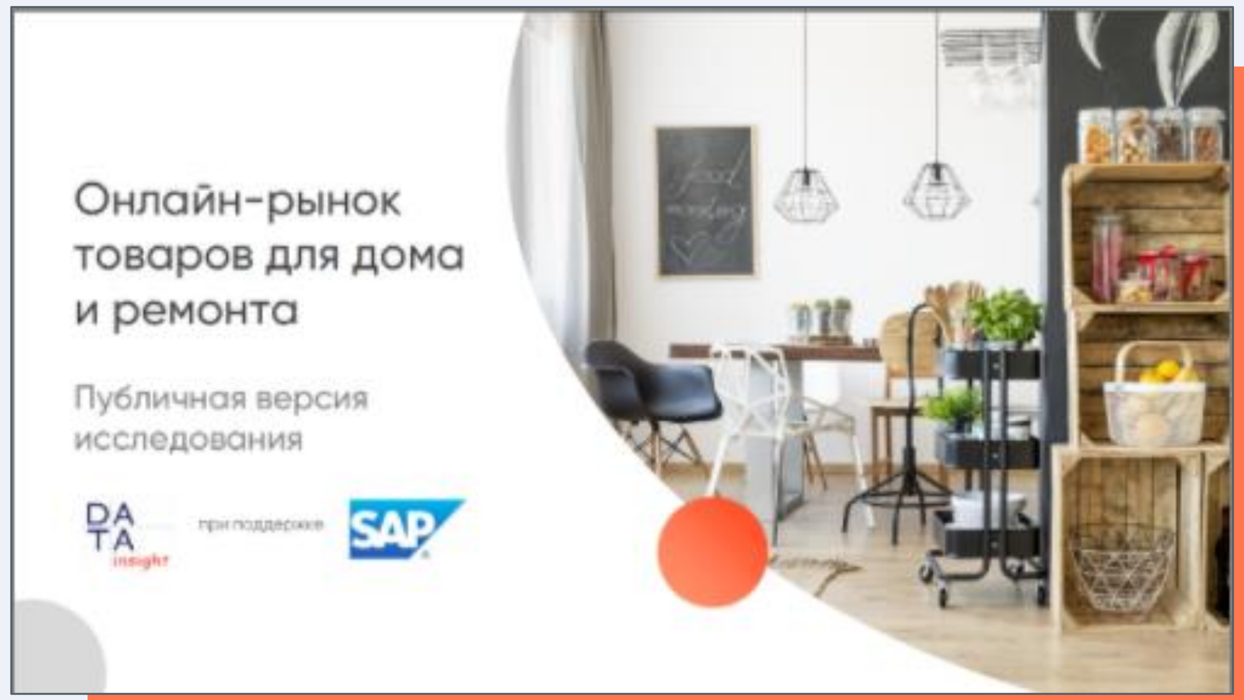
Online Retail Exports, 2020



Online C2C Market, 2020

DATA insight

Public reports: product categories

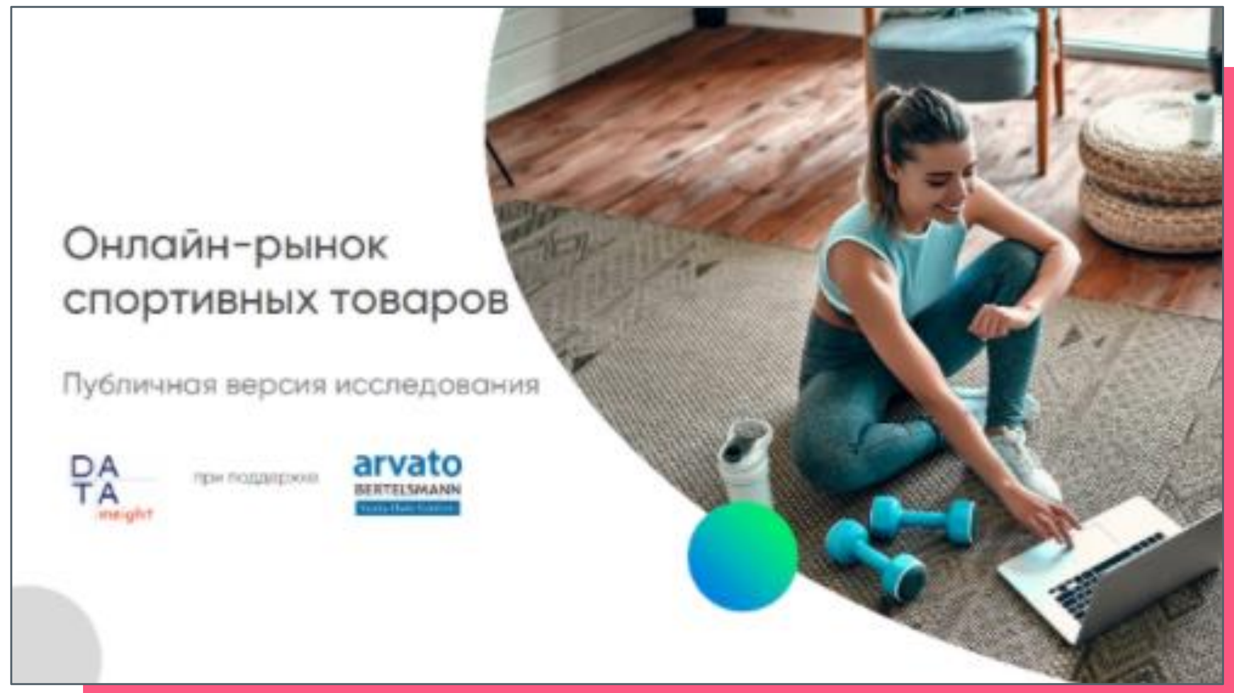


Online market of homeware and DIY products

Sales geography per product category: Apparel

Sales geography per product category: Cosmetics

Sales geography per product category: Sports goods



Online market of sports goods

Online pharmacies market 2019

2021 research release plan

1. Top 100 Russian online stores
2. Pick-up points and lockers
3. Russian e-commerce ecosystem
4. Express delivery
5. Last mile
6. Fulfillment
7. Logistics services for online stores: customer opinions and expectations
8. Final logistics
9. E-commerce in Russia

Data sources and methodology used by DI

1. Surveys of buyers and businesses
2. Monitoring online store traffic (data by Yandex.Radar, SimilarWeb etc.)
3. Monitoring the number of online store orders (over 3000 retailers)
4. Own data of online stores (over 100 retailers)
5. Aggregated data of B2B services (logistic, payment services etc.)
6. Analysis of sample data on online behavior of Internet users (clickstreams)
7. Website content analysis (assortment, prices, reviews)
8. Search queries and user interests analysis

Data Insight Partners

ROBOKASSA
Delivery Club
DHL
Яндекс Касса
PayPal
OZON
Avito
emarsys
itella
PayU
expertsender
Gett
aristos
Distance Selling Service
IML
dpd
AWG
GetResponse
lamoda
esolutions
A member of the otto group
ebay
dentsu AEGIS network
dynamic yield
220 вольт
Яндекс Маршрутизация
PIM SOLUTIONS
SAP
CDEK
mindbox
Яндекс Маркет
RBK. money
GETNPOST
ПОЧТА РОССИИ
SPSR express
boxberry
ПЭК:
PickPoint
QIWI
Всё проще
dalli
служба доставки
5post
atlas
people & screens
arvato
BERTELSMANN
JLL
pro store
by Lubivaya
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DATA insight

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in research and consulting in the area of
e-commerce and other online markets

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