



# L'e-commerce nel 2020: Rivoluzione in atto per gli esercenti?

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**BAIN & COMPANY** 

# Who we are



**Valentina Gorgoglione**

Senior Manager

**Bain & Company**

- ~10years of experience in Consulting
- Practices Digital Payments / Retail & Luxury



**Marco Campagna**

Senior Manager Charge  
and Revolving products

**American Express**



**Dirk Pinamonti**

Head of e-commerce  
**Nexi**

**Chiara Rota**  
Founder & CEO  
**My Cooking Box**



**Michele Simone**  
Head of Partnerships  
Southern Europe  
**PayPal**



According to latest updated figures, e-commerce is a massive reality both at the Global and European level



**~2.6**

Value of **global e-commerce** transactions in T€



**~0.5**

Value of **European e-commerce** transactions in T€



**+18%**

YoY **growth** of e-commerce in **Europe**



**+10-13%**

**Weight** of e-commerce in Europe over **Retail/ Consumer Payments**

Source: Politecnico Milano, Euromonitor, Bain analysis

Italy starts from lower penetration, but is growing @30%+ YoY



**~30**

Value of **Italian e-commerce** transactions  
in M€



**~50%**

... of which with a **mobile** device



**+30%**

YoY **growth** of e-commerce in **Italy**



**+6-8%**

**Weight** of e-commerce in Europe  
over **Retail/ Consumer Payments**

Source: Politecnico Milano, Euromonitor, Bain analysis



# COVID has leap-frogged the e-comm penetration on specific sectors



GDO



2019 E-comm %

~1%

2020 PRE-covid  
expected %

~1.5-2%

2020 POST-covid  
expected %

~4-5%

Restaurants



~1%

~2%

~6-7%

Fashion



~10%

~13%

~17-18%

Consumer  
Electronics



~14%

~19%

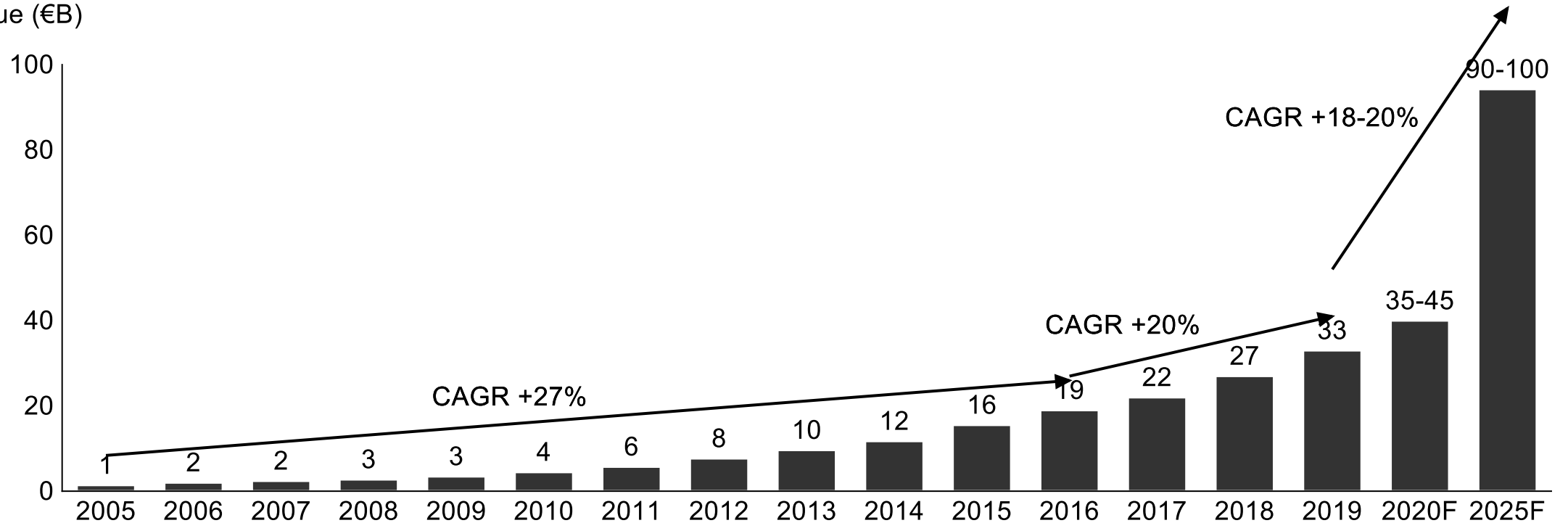
~25%

Source: Politecnico Milano, Euromonitor, Bain analysis

# E-commerce is here to stay: the Luxury Personal Goods example

## Global Personal Luxury Goods Market – Online (€B; 2005-2025F)

Market value (€B)



Penetration (%) 1% 1% 1% 2% 2% 3% 3% 4% 4% 5% 6% 8% 9% 10% 12% ~20%+28-30%

Source: Bain Altagamma

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