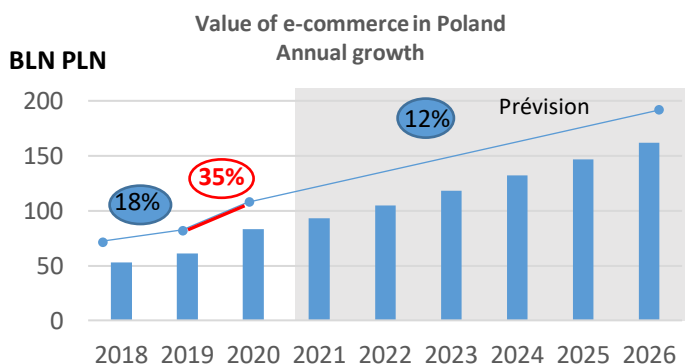


INTRODUCTION :

In 2020, the e-commerce market in Poland was worth PLN 100 billion (€22.2 billion), representing +35% growth vs. 2019. It represents 4.3% of the sector's value at European level. The COVID-19 epidemic has boosted the sector, which has seen a large number of online shops developing (11,000 were created in 2020) and today 80% of Poland's 28 million internet users place their orders online.

Value of online product sale in Poland



Annual growth by sector in online sales

Sector	Value 2020 (BLN PLN)	Growth 19-20 %	Forecast CAGR 20-26
Automotive and other	9	15,7	12,2
Food products	4	57,5	28,7
Health and beauty	7	38,2	12,5
Toys and baby items	8	39,4	14,0
Clothing and footwear	13	46,1	12,3
House and garden	21	42,8	9,7
Electronics and media	20	24,3	7,1

2 major players



- Leading marketplace in Polish ecommerce.
- On the market since 1999, hires 3,150 people.
- 21 million registered customers - the platform is visited by 18 million internet users per month and 1.2 million products are sold every day.

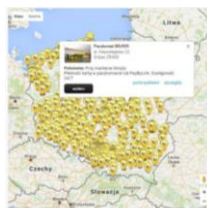


- Present in Poland since 2014 with 10 logistics centres
- Commercial presence via its website Poland since March 2021 - over 100 million products available
- 18,000 employees - €3 billion of investments

Massive development of "Paczkomat"

Paczkomat InPost: a locker system for receiving parcels 24 hours a day - 7 days a week.

- Located in easily accessible locations - close to homes, in towns and in the countryside.
- Easy way for returning products.



61 %
of Poles choose delivery
via paczkomat



Other players in Poland



- Classifieds for buying and selling services and goods



- Marketplace: no head office in Poland but warehouse in Stubice.



- Price comparator and Marketplace



- Auctions and marketplace

Opportunities for foreign companies

- 38 million inhabitants in Poland, of which almost 28 million use the Internet daily and 80% do the shopping online
- Continuous double-digit annual growth, new e-commerce platforms open and more and more existing brands develop their sales on the Internet.
- The development of e-commerce has accelerated with the pandemic. Shops and trading platforms has noted a significant increase in sales and many retail chains have decided to launch their own online shops.
- Rapid increase in online sales in the food sector (+57% in 2020) - development of refrigerated "paczkomat" for simplified delivery
- The number of Polish e-commerce customers who buy from foreign sites is also increasing - so opening a Polish version of an e-shop, with prices in local currency, also seems interesting

Sources : Marketline, Gemius, Eurostat, Inpost, Dhandlu, Amazon, Allegro
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