



**Euromonitor
International**

Identifying Key Retail Partners for Brands to Expand E-Commerce Sales

July 2023

INTRODUCTION

Scope

About the data used in this report

Key takeaways

HOW BRANDS CAN GAIN SHARE OF DIGITAL SHELF

Despite slowing sales growth, e-commerce remains the primary driver of global retail sales

How to grow online channels as e-commerce growth normalises

SPOTLIGHT: BEAUTY AND PERSONAL CARE

Three categories constitute the majority of global beauty and personal care sales by value

Other retailers are playing catch-up to Amazon globally

The fourth quarter of the year looms large in beauty and personal care e-commerce

Amazon's relative weakness in fragrances gives other e-commerce retailers an opening

Beauty specialist Douglas appeals to European digital consumers

Retail generalists find success with online sales of skin care products

Hypermarkets operator Target has carved out a place for itself

Amazon leads in global colour cosmetics online, but national champions emerge

Nykaa stands as the clear leader in its home market of India

SPOTLIGHT: BEAUTY AND PERSONAL CARE

What's next?

SPOTLIGHT: FOOD AND BEVERAGES

In food and beverages, the US and the UK are the clear standouts in e-commerce sales

Walmart leads the way in global food and beverages e-commerce

Walmart's leading position in the US market helped by its strength in curbside pick-up

Amazon performs well in several food and beverage categories: especially hot drinks

Alcoholic drinks bucks overarching trends in food and beverages e-commerce

Tesco has a commanding lead in food and beverages e-commerce in the UK

In cooking ingredients and meals e-commerce, direct-to-consumer meal kit players stand out

HelloFresh sets the pace for the meal kit market

Seasonality is less of a factor in food and beverages than other FMCG industries

What's next?

SPOTLIGHT: HOME PRODUCTS

In the home products space, pet care has led e-commerce adoption

Amazon is the most important player in home products e-commerce

In pet care e-commerce, Amazon takes a back seat to digitally-native pet care specialists

ZooPlus has staked its position as the pet care e-commerce leader in continental Europe

In tissue and hygiene e-commerce, retail generalists reign supreme

Magazine Luiza occupies a unique niche in Brazilian e-commerce

Air care and bleach buck the trend in home care e-commerce

Bath & Body Works embraces loyalty to drive e-commerce sales growth

The impact of seasonality is far more apparent in some home product categories than others

What's next?

CONCLUSION

Key takeaways

What will it take to win?

About Euromonitor's Syndicated Channels Research

Watch industry experts debate the future trajectory of e-commerce

About Euromonitor International

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- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/identifying-key-retail-partners-for-brands-to-expand-e-commerce-sales/report.