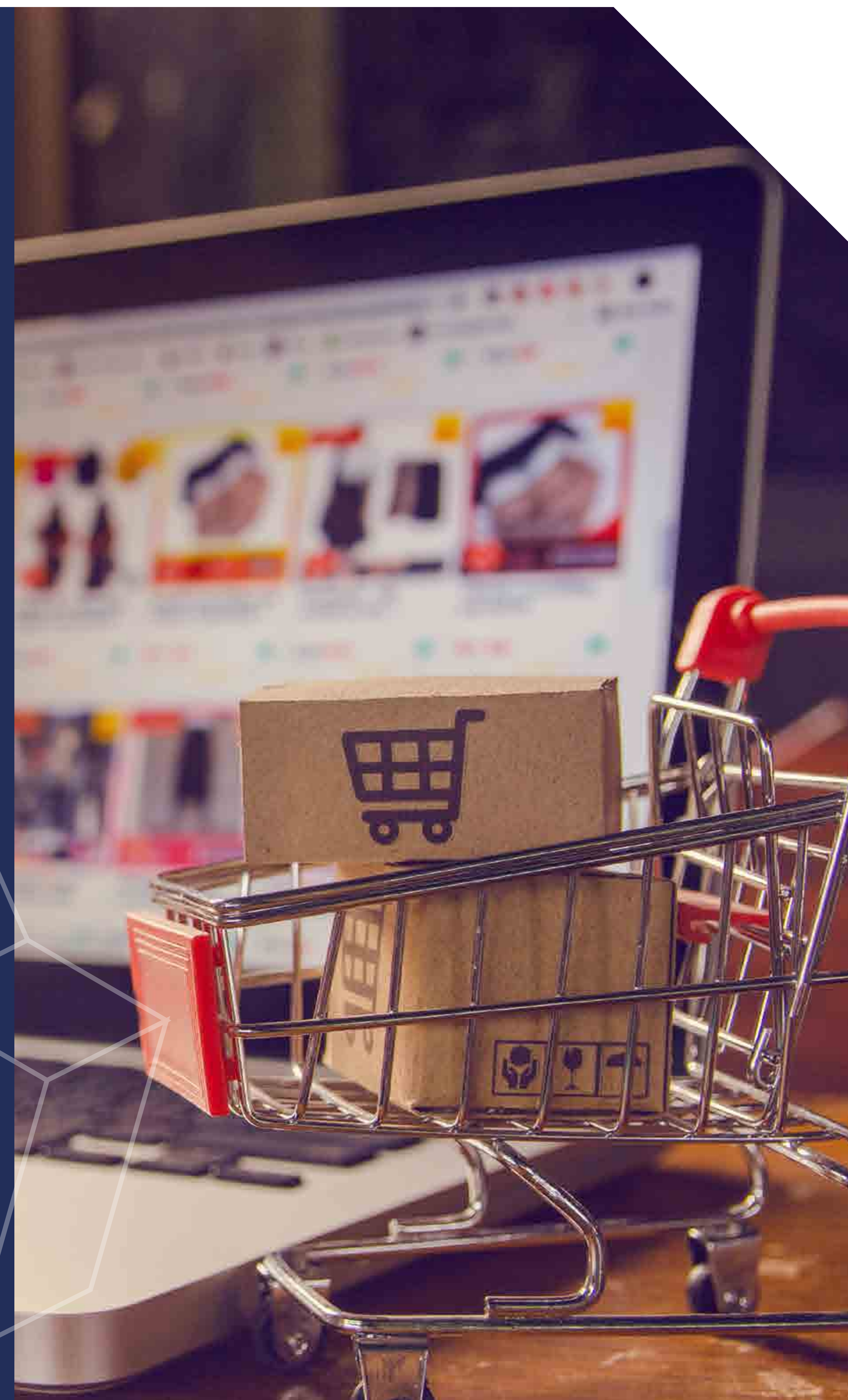


ONLINE RETAIL MARKET IN POLAND 2025

E-COMMERCE MARKET ANALYSIS
AND DEVELOPMENT FORECASTS
FOR 2025-2030



However, in 2025, its growth is accelerating, driven mainly by Chinese platforms - Temu, Shein, and AliExpress - which are experiencing increases significantly outpacing the growth of domestic online stores and marketplaces. Foreign players are appearing more frequently among the largest entities in the Polish e-commerce market - and across multiple product categories.

At the same time, domestic platforms are developing, and many players who previously operated online stores are expanding into marketplaces. Among the most recent or planned implementations are Castorama, MediaMarkt, Sinsay, and Media Expert. Although online stores still dominate, their share is gradually decreasing in favor of marketplaces, while the cross-border channel is becoming an increasingly strong competitor.

Noteworthy is also the planned debut of TikTok Shop in Poland in 2026. In July 2025, only 10% of e-consumers in Poland expressed interest in live shopping via TikTok, which may be due to low awareness of the format. Meanwhile, data from other countries confirm the significant potential of this model. For example, in France, just a week after the TikTok Shop launch in March 2025, 42% of consumers were aware of the solution (60% in the 18–34 age group), and 36% of users were ready to make a purchase via the platform.

What growth rate will the cross-border channel achieve in 2025? What share of the e-commerce market will it represent in the coming years? How strong is the position of Chinese platforms in terms of GMV? The answers to these questions can be found in the report "Online retail market in Poland 2025." Enjoy the reading.

**Agnieszka Skonieczna**

Head Retail Market Analyst, PMR Market Experts/Hume's Institute

Author of the report "Online retail market in Poland 2025"



Main objective

To provide a comprehensive overview of the online retail market, including a breakdown by product category.

Additional objectives

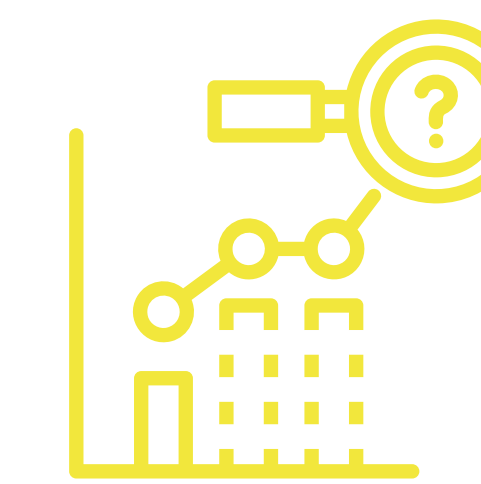
The specific objectives of the research and analysis carried out for the report were to identify:

- product categories in the online retail market,
- most prospective channels in the market (online stores, e-commerce platforms), including in individual product categories,
- key macroeconomic, demographic, demand-side, supply-side and technological factors and trends affecting the e-commerce market,
- number of online stores, broken down by main market segments,
- Poles' online shopping behaviour and preferences,
- value of Poles' purchases in foreign online stores.



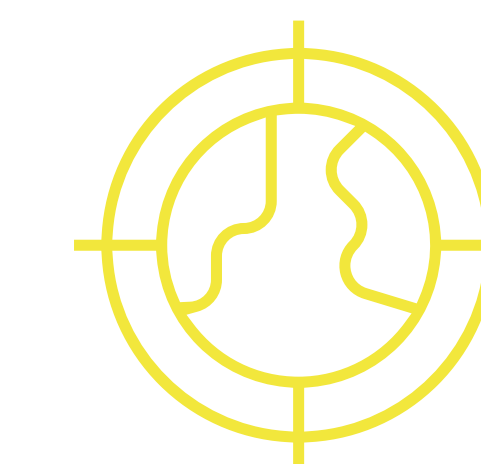
Time span

2021-2024



Forecast horizon

2025-2030

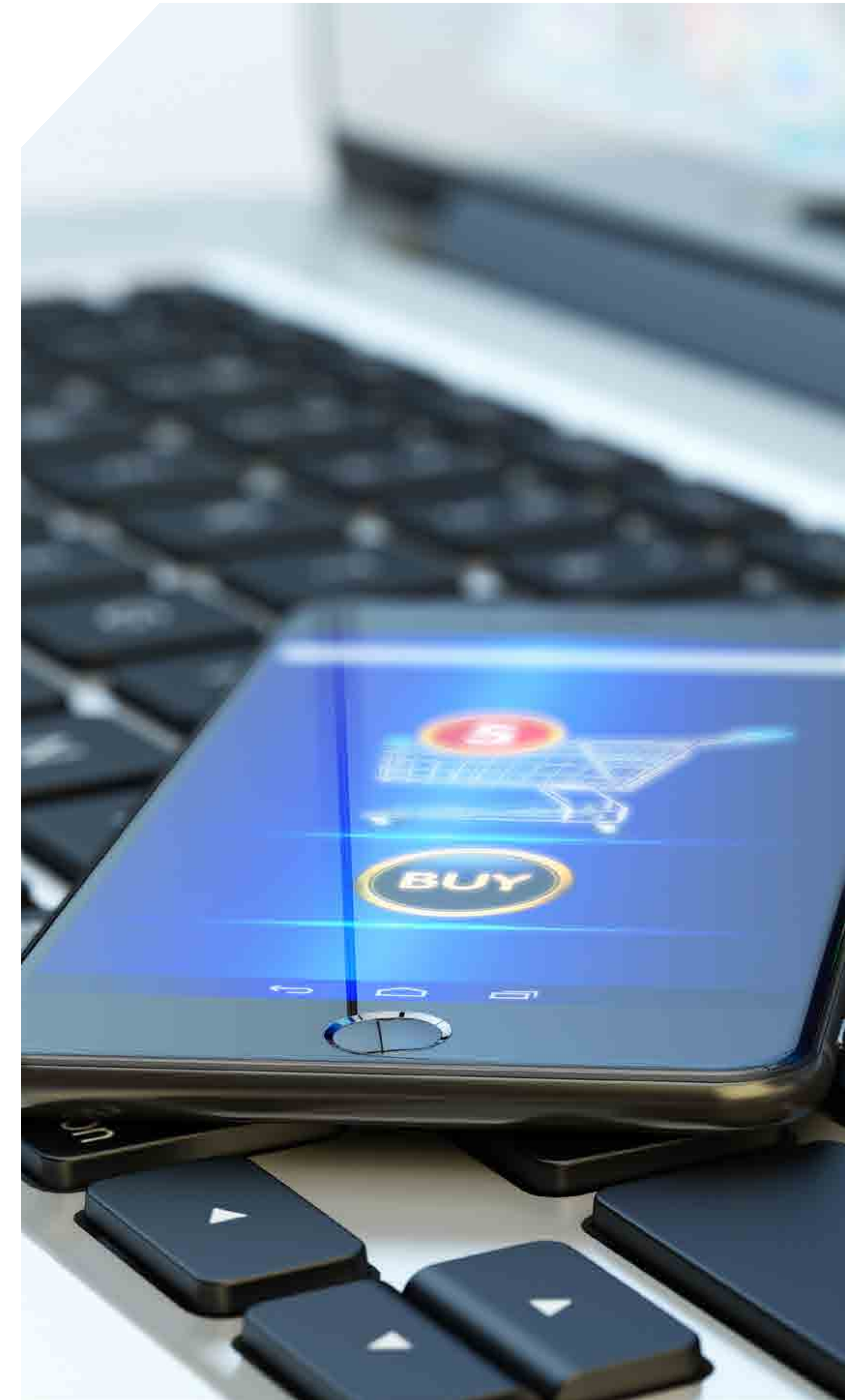


Geographic coverage

The report covers online shopping in Polish online stores and purchases made by Polish customers in foreign stores and on e-commerce platforms.

What is included in the report?

- **market value** in 2021-2024
- **market structure** in 2021-2024 by product category
- macroeconomic, demographic, demand-side, supply-side, technological and legal **factors affecting the market**
- **number of online shoppers** and penetration of online shopping overall and in specific product categories
- **major players** in the online retail market
- **forecasts** up to 2030 for:
 - ↳ sales values and growth dynamics of the overall e-commerce market,
 - ↳ sales values and growth dynamics of individual product categories,
 - ↳ sales values and growth dynamics generated by online stores, marketplaces, and the cross-border channel.





Subject matter

- market value
- breakdown of the total market value by e-commerce platforms, online stores, segments and product categories
- forecasts for:
 - ↳ entire market
 - ↳ individual market segments and product categories
- revenues of the major players:
 - ↳ in the entire market
 - ↳ in the largest product categories
 - ↳ standing of Chinese platforms

REPORT UPDATE

Update of key data and forecasts: value of the market, value of the product categories (including a breakdown by online stores and e-commerce platforms), results of top players. Available six months after the report's release.

Scope

The report covers the following product categories:

IN-DEPTH STUDY

1. clothing and footwear
2. cosmetics
3. electronics
4. food products
5. DIY products
6. home furnishings
7. pet products
8. books and multimedia
9. automotive accessories
10. accessories for children
11. non-prescription products and dietary supplements
12. sports goods
13. jewellery
14. household chemicals
15. clothing and footwear accessories

RESULTS OF
A SURVEY OF
1,500
CONSUMERS

Methodology applied in the survey

The structure of the questionnaire included several blocks of questions:

1. Consumer behaviour.
2. Purchases in specific product categories.
3. Trends in e-commerce.
4. Respondent's particulars.

As part of the block on consumer behaviour, we asked about:

- frequency of online shopping,
- devices used for shopping online,
- product categories purchased online (frequency, time of the last purchase),
- use of e-commerce platforms,
- used and preferred means of delivery,
- used and preferred means of payment.

In the block on purchases in specific product categories, we asked about:

- specific types of products bought online,
- devices used (desktop, mobile, other),
- offline to online store purchases ratio,
- purchasing process (ROPO and reverse ROPO, ROTOPPO, etc.),
- frequency of online shopping in a given category,
- sources of information on products.

Forecasts for additional indicators included in the report

Long-term market development forecasts were prepared for the report using econometric models and historical time series.

The forecasts cover the period 2025-2030.

In addition to the forecasts for the value of the market, sales channels and market segments, the report also covers forecasts for selected macroeconomic indicators, including:

- GDP per capita and real GDP change,
- overall inflation,
- average annual LFS unemployment rate and real change in average monthly gross wage in Poland,
- real change in disposable income of Polish households and private consumption,
- number of Poland's residents and share of each demographic group,
- percentage of internet users and percentage of online shoppers in different age groups in Poland.

The forecasts by PMR Market Experts published in the reports are highly accurate – the typical error rate (MAPE) is usually below 3%



10 reasons to invest in the report "Online retail market in Poland 2025"

1 **Comprehensive overview of the e-commerce market**
Value and structure of the Polish e-commerce market in 2021-2024 and detailed growth forecasts up to 2030.

2 **Access to accurate econometric forecasts**
Forecasts of online sales values and growth rates, taking into account macroeconomic and demographic factors.

3 **Up-to-date information on sales channels**
Analysis of the sales structure in online stores and on e-commerce platforms, taking into account their growth rates, fluctuating market shares, and factors driving the popularity of individual channels.

4 **Insights into consumer behaviour and preferences**
Socio-demographic profile of online shoppers, motivations, purchasing paths and differences between product categories.

5 **Analysis of the competitive landscape and market shares**
Top players in the online market and in the largest product categories, standing of Chinese platforms.

6 **Macroeconomic and demographic market conditions**
Forecasts for such indicators as CPI, GDP, disposable income, population and demographic groups.

7 **Ability to benchmark your own sales**
Facilitating a comparison of the company's performance with market value in a given category and sales channel, and with top players.

8 **Support for strategic and investment decisions**
Data as a basis for decision-making by the management board, strategy, sales and marketing departments, as well as for analyses carried out by banks and investment funds.

9 **Additional materials - source data in an Excel spreadsheet**
Enable independent data aggregation, analysis and in-house model development.

10 **Proprietary survey and experience**
Combined data sources (primary, secondary), 20+ years of expertise in the market, methodology based on dozens of variables.

What questions does the report provide answers to?

- What was the value of the e-commerce market in Poland in 2021-2024
- What are the forecasts until 2030?
- How is the share of online stores and e-commerce platforms in the value of the online retail market changing?
- Which players prevail in the Polish e-commerce market and what is its degree of concentration?
- What are the main consumer, technological and macroeconomic trends influencing the development of online retail in Poland?
- Who is the Polish e-consumer - how often do they buy online, what devices do they use, what forms of payment and delivery do they choose?
- What is the structure of online shopping by product category?
- Which segments are growing the fastest and what are the forecasts for their value up to 2030?
- How does the consumer purchasing process differ depending on the product category?
- How is the cross-border e-commerce market developing in Poland – how many Poles shop abroad and what products do they choose most often?
- What legal and regulatory factors have the greatest impact on the development of online retail in Poland?

DATASET – together with the report, we provide the most important data in an Excel spreadsheet for independent aggregation.



PMR Market Experts is a brand of market reports prepared by Hume's Institute

At PMR Market Experts, we have been preparing cyclical industry reports for over 20 years. Our core specialisations:

- Digital & ICT
- Retail
- Pharma & Healthcare
- Construction

Our reports are more than just a compilation of facts - they are reliable knowledge based on proven methodology. We combine primary and secondary data, proprietary algorithms and econometric models to provide precise information about the market, its values, growth rates, segments and key players.

We are part of Hume's Institute - a 360° research agency specialising in quantitative and qualitative research, forecasting and market predictions.

PMR Market Experts' **data analysis and verification expertise, unique insights and proven forecasts** provided by Hume's Institute give real insight and advantage to our Clients.

More than 600 clients worldwide have already benefited from our services. **We have analysed more than 5,000 brands, operating in over 50 markets.** We are trusted by major companies - **we work with 70% of the prestigious Fortune 500 brands.**

20+

years of experience

600+

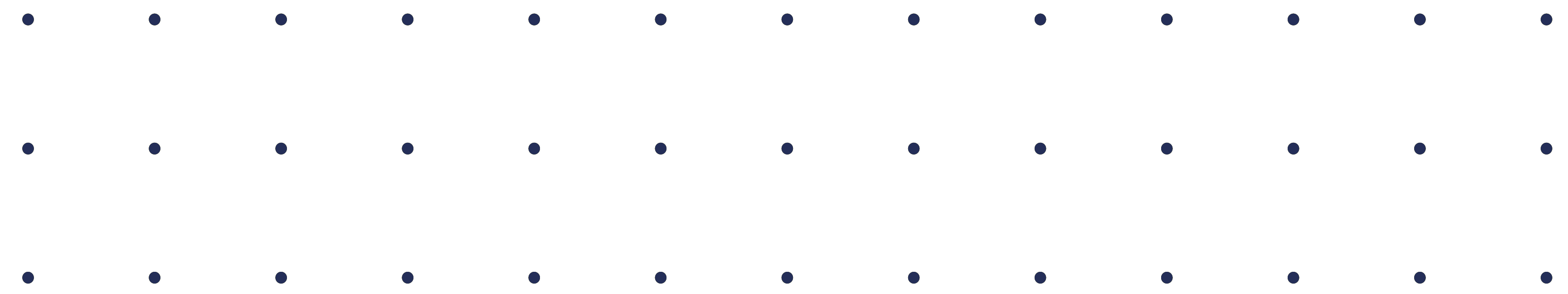
global clients

5,000+

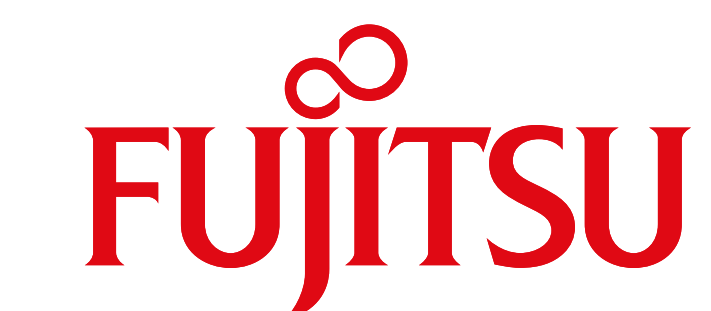
brands studied

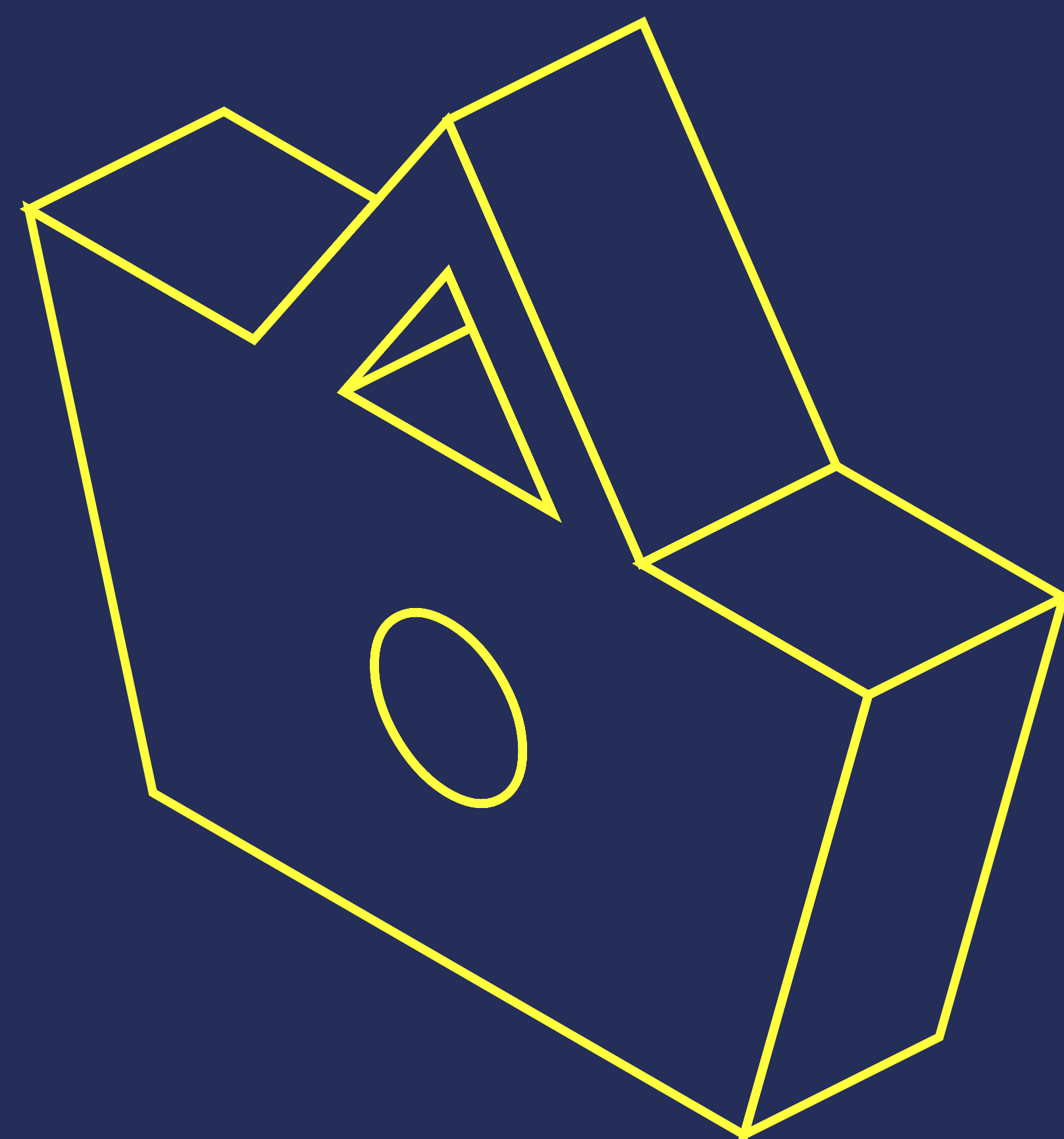
50+

analysed countries



Our clients





RETAIL

MARKET ANALYSIS AND 5-YEAR DEVELOPMENT FORECASTS

- Retail market of **home appliances, electronics and digital media** in Poland
 - **Food to Go** retail market in Poland
 - **Cosmetics** retail market in Poland
 - **DIY** retail in Poland
 - **Home furnishings** retail market in Poland
 - **HoReCa** market in Poland (additional data update: March, September, December)
 - **Grocery** retail market in Poland
 - **Clothing and footwear** retail market in Poland
 - **Sports goods** retail market in Poland
 - **Children's products** retail market in Poland
 - **Online retail market** in Poland (additional data update: March)
 - **Diet catering** market in Poland
- **Retail** in Poland
 - **Pet care and products** market in Poland
 - **HoReCa supply** market in Poland
 - **Non-food discounters** market in Poland
 - **Diet catering** market in the Czech Republic
 - **Clothing and footwear** retail market in the Czech Republic
 - Weekly: **PMR Retail Insight** (Poland, Hungary, Romania, Slovakia, Czech Republic)

NEW REPORTS



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