



E-barometern

PostNord in association with HUI Research

Q1

2026

postnord

About E-barometern

PostNord monitors the Swedish retail sector's e-commerce development in association with HUI Research. E-barometern is published once a quarter and is based on four consumer surveys and a survey of companies. E-commerce is defined in E-barometern as being the online sale of items, with subsequent delivery to the home or a distribution point, or collection by the consumer from a store, warehouse or distribution center. The following are therefore not considered to be e-commerce in E-barometern:

- In-store purchases that were initially arranged via the internet
- The online sale of services (for example, travel, hotel accommodation and concert tickets)
- Downloading of, for example, music files, movies and applications
- Business-to-business online sales
- Consumer-to-consumer online sales

E-barometern Q1 2026 is based on information gathered from retail companies in April and May 2026. A total of 96 companies that sell items online participated in the survey. Four consumer surveys have been carried out using Kantar's web panel.

All the surveys are conducted with a representative sample of Sweden's population between the ages of 18 and 79. The first survey was conducted in February 2026, the second in March 2026 and the third in April 2026, with around 1,300 respondents per survey. The fourth survey was conducted in March 2026 with 3,001 respondents. The online surveys are representative of the 98 percent of Sweden's population that has internet access. Unless stated otherwise, data in brackets refers to the corresponding period in the previous year. PostNord can be contacted for detailed information about each survey.

Foreword

The first months of 2026 were characterized by continuing uncertainty in the world. Geopolitical tensions, trade conflicts with disruptions in the Strait of Hormuz, and new tariffs set the tone for the first quarter and contributed to the economic environment being more difficult to assess. Although the confidence of consumers in their own finances remains weak, due to concerns about global conflicts and disputes, there are signs that the Swedish economy is recovering, as the rate of inflation has slowed and purchasing power has strengthened.

Despite the uncertainty, there was positive growth in the first quarter in all the sectors measured in the E-barometern, which demonstrates the resilience and adaptability of the industry. E-commerce continues to be a popular channel among consumers, while competition from both international market participants and second-hand options is increasing, as are demands regarding relevance, clarity and smooth shopping journeys.

In this year's first E-barometern, we take a closer look at international e-commerce. Interest among consumers in Sweden regarding buying goods from abroad remains high, but this year's report also highlights a new perspective: Swedish e-commerce exports. More and more Swedish e-retailers are looking beyond the country's borders for growth, while local regulations, consumer behavior and channel choices are crucial elements in achieving success.

Another new feature is that for the first time we have a dedicated chapter about AI in e-commerce. As AI is becoming a natural part of many consumers' everyday lives, we have identified a need to assess in detail how this technology is influencing the purchase journey. The report shows that use of AI in the purchase journey is widespread, especially among younger consumers, but that there is still a long way to go before the technology itself is actually allowed to make the purchase. The report also provides new insights about circular e-commerce. The share of people making second-hand purchases from traditional e-retailers remains at three

percent, which is around the same as in both 2024 and 2025. In summary, Swedish e-commerce is characterized by broad positive growth, despite the global situation having an impact on the market.

We hope that E-barometern will provide you with valuable insights, perspectives and inspiration in a time of rapid change.

Enjoy the read!



Ylva Staszewski
Head of the Parcels business area,
PostNord Sweden

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Stronger purchasing power despite an uncertain world

Following on from an uncertain and eventful 2025, the beginning of this year has also been characterized by a tense situation in the world. Trade disputes and new tariffs set the tone early on, and in late February war broke out in Iran. The disruptions in the Strait of Hormuz have contributed to increased volatility in global markets, not least because of the impact on energy prices and transport costs. This in turn has led to continued uncertainty in the global economy, which could mean longer lead times and higher costs for e-commerce.

At the same time, there are signs that the Swedish economy is continuing to recover, despite the global turmoil. Consumer purchasing power is strengthening as inflation moderates and fiscal measures are introduced, which means there are better conditions for growth in 2026¹⁾ There are also signs of an increased willingness to consume. Consumers are saving less and consuming more than before²⁾

However, the confidence of consumers regarding their own finances remains weak,²⁾ which reflects the uncertainty in the world.

With additional support from the spring budget, for example as a result of reduced fuel taxes and new electricity subsidies,³⁾ the scope for consumption is increasing. In addition, a parliamentary election is coming up in September, which could mean uncertainty about both the future direction of economic policy and consumers' online and in-store consumption options.¹⁾

It remains to be seen how developments take shape during the year. The conditions are in place for stronger consumption, but the uncertainty regarding the global situation makes it difficult to assess to what extent this will actually materialize. This is particularly the case with e-commerce, as both cost increases and longer delivery times may put a brake on development.

¹⁾ Retail Outlook Report, March 2026 ²⁾ Confidence Indicator, April 2026 ³⁾ Press release Ministry of Finance, April 2026



Total	7%
Pharmacy	13%
Furniture & home furnishings	11%
Sports & leisure	10%
Groceries	9%
Books & media	6%
Clothing & footwear	5%
Home electronics	4%
Building products	3%

Positive start to the year for e-commerce

2026 has started on a positive note for e-commerce, with growth of 7 percent in the first quarter of the year. All the sub-sectors monitored by E-barometer experienced positive development during the quarter, a trend not seen since the pandemic. This indicates a broad recovery and increased confidence in the future of e-commerce.

Online pharmacy sales developed strongly in this quarter as well, and it remains the fastest growing sector, with an increase of 13 percent. Despite the fact that online pharmacies face high comparative figures, the trend remains in double digits, even after several years of strong growth. This means that the online strategies of pharmacy operators, with a broader range of products and competitive prices, continue to be a recipe for success.

The furniture and home furnishings sector grew the second most during the quarter, with an increase of 11 percent. Last year, this sector enjoyed a positive full-year performance, and the recovery has continued strongly this year. The sports and leisure sector started the year with double-digit growth of 10 percent, thanks to a snowy winter season and several big championship events during the period.

Books and media finally had a positive quarterly performance. After more than a year of negative figures, growth was 6 percent. This is a welcome change for the sector, which was the only area with negative full-year growth in 2025.

With positive development in all sectors, the conditions are in place for a successful 2026 for e-commerce.

Online pharmacies drive growth with new additions

The pharmacy sector continued to develop strongly in early 2026. In the first quarter, online sales increased by 13 percent. Online pharmacies thus continue to show double-digit growth despite already having had several years of strong performance and high comparative figures.

The growth of e-commerce in the pharmacy sector is leading to further investment in warehousing and logistics. Apotek Hjärtat is investing in a new logistics center, so that it can meet the increased online volume and make the flow of goods more efficient.¹⁾ and Meds is also enhancing its capacity by renting a new logistics center²⁾

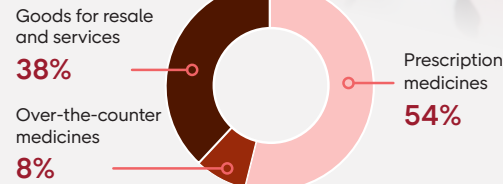
At the same time, the sector's boundaries are becoming increasingly flexible. The online spread of the pharmacy sector is something that has been highlighted in *E-barometer* previously, especially regarding moving into health and beauty. However, pharmacies are now increasingly focusing on offering groceries in their online product ranges

as well. For example, Meds, together with influencer Jina Tamara, has launched a "Girl Dinner Starter Kit" with contents such as olives, dates and kombucha.³⁾

In the first quarter, attention was also drawn to the VAT reduction on food, which further highlighted the shift towards groceries, as parts of the pharmacy range will in practice be treated as foodstuffs in this regard. Apotek Hjärtat announced in March how the VAT reduction will have a direct impact on prices in its online store. In addition to food products being affected by the reduction in VAT, categories such as minerals, vitamins and food supplements are also covered by this.⁴⁾

Overall, the pharmacy sector continues to develop at a rapid pace, characterized by strong growth and an increasingly broad product offering. E-commerce remains a clear driver of economic and innovative development in the sector.

13%
E-commerce growth
Q1 2026



Sales in the outpatient market, e-commerce Q1 2026

Source: Swedish Pharmacy Association/SA Service AB

SEK 553

SEK +94 since last year

Average amount spent online over last 30 days

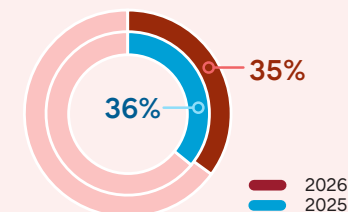
Basis: Consumer, has shopped online, average Jan–Mar

SEK 560

SEK -145 since last year

Average amount paid for most recent purchase from abroad

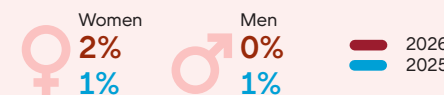
Basis: Consumer, has made online purchases from abroad



Percentage of e-commerce consumers who made a purchase in the category

Basis: Consumers who have shopped online

Percentage who bought something in the category when making their last foreign purchase



Basis: Consumers who have shopped online

¹⁾ Ehandel, March 2026 ²⁾ Dagens industri, February 2026 ³⁾ Meds, Girl Dinner Starter Kit, April 2026 ⁴⁾ Ehandel, March 2026

Recovery under construction

The cold weather in February slowed the development of building products retailing and contributed to a later start to the season than in the previous year.¹⁾ Despite this, e-commerce continued its positive trend from 2025 and developed positively in the first quarter of 2026 as well. Building products retailers increased their online sales by 3 percent in Q1.

There are several signs that the situation in the construction sector will improve further. For example, the number of redundancies in the industry decreased during the quarter, and although this is not directly linked to the figures in E-barometern, it provides an indication that the industry is generally stabilizing.²⁾ Immediately after the end of the quarter, a lowered amortization requirement and higher mortgage ceiling were introduced.³⁾ Expectations regarding the new rules seem to have already affected the market in the first quarter, as prices for small apartments hit a record.⁴⁾ Going forward, this may give the industry a further boost, as a more fluid housing market often leads to more renovations being carried out.

At the same time, there is a risk that

factors on the other side of the scales are holding back development. The return to normal conditions for ROT (Repairs, Conversion, Extension) eligibility may decrease willingness to renovate,⁵⁾ and more stringent rules for additional loans may make it more difficult to finance building projects.

The construction industry continues to be characterized by uncertainty, but with development being driven by innovative actions. Investment in AI and digital solutions is continuing to increase. For example, at the end of March, Hornbach launched a new AI assistant to guide consumers through both the purchase journey and various construction projects.⁶⁾ Byggmax has also invested in AI-driven solutions – in 2025, the company introduced an AI-based chat function, which was highlighted in E-barometern Q3 2025.

Looking ahead, the sector is characterized by both challenges and opportunities. If the economic situation continues to improve, 2026 is likely to be the year in which the recovery moves from being under construction to being on solid ground.

3%

E-commerce growth
Q1 2026



SEK 1,517

SEK -593 since last year

Average amount
spent online over
last 30 days

Basis: Consumer,
has shopped online,
average Jan–Mar

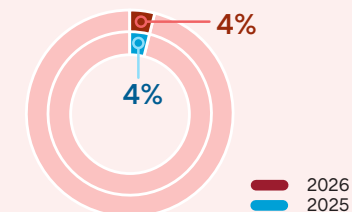


SEK 959

SEK +213 since last year

Average amount
paid for most recent
purchase from abroad

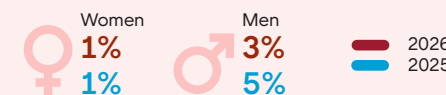
Basis: Consumer, has
made online purchases
from abroad



Percentage of e-commerce
consumers who made a
purchase in the category

Basis: Consumers who have shopped online

Percentage who bought something
in the category when making
their last foreign purchase



Basis: Consumers who have shopped online

From bookshelf to playlist

After a tough year in 2025, the books and media sector made a comeback in the first quarter of 2026, growing by 6 percent. This was the first time in a year that online growth was positive. The annual book sale, which is an important sales period for the industry, was record-breaking according to Bokusgruppen. In addition, the growth received an extra boost from crafts and games, not least as a result of better visibility online.¹⁾ The Swedish Publishers Association also notes that online bookstores and book clubs grew in the first quarter, for the first time since 2021.²⁾

Sales of physical books developed strongly during the quarter, while sales of digital subscription services also continued to grow.²⁾ As more platforms, including Spotify, which launched its service at the end of 2025,³⁾ start offering audiobooks, competition is intensifying. This in turn leads to increased pressure on traditional online bookstores.

These developments open up new ways of reaching and cultivating interest

among consumers. For example, Adlibris has launched a podcast focusing on reading, learning and creating. This initiative aims to extend the life of both authorship and titles beyond the traditional release cycle.⁴⁾ Although audiobooks are not included in E-barometern, they are an important source of entertainment that the sector monitors.

The purchasing of academic course literature is also changing. Already in [E-barometern Q3 2025](#), it was noted that fewer students are buying course literature. During the quarter, there was further indication of this change, with Campusbokhandeln announcing that it is closing its physical stores and focusing entirely on online sales, partly as a result of students' changing purchasing behavior.⁵⁾

The books and media sector remains a challenging environment. After a period of headwinds, there are signs of stabilization, while new formats, market participants and business models are shaping the way forward.



6%

E-commerce growth
Q1 2026



SEK 536

SEK +18 since last year

Average amount
spent online over
last 30 days

Basis: Consumer,
has shopped online,
average Jan–Mar

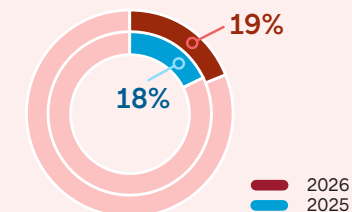


SEK 823

SEK +94 since last year

Average amount
paid for most recent
purchase from abroad

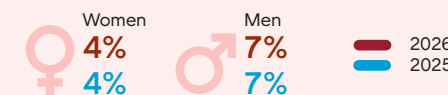
Basis: Consumer, has
made online purchases
from abroad



Percentage of e-commerce
consumers who made a
purchase in the category

Basis: Consumers who have shopped online

Percentage who bought something
in the category when making
their last foreign purchase



Basis: Consumers who have shopped online

¹⁾ Bokusgruppen, April 2026 ²⁾ Swedish Publishers Association, April 2026 ³⁾ SVT News, November 2025 ⁴⁾ Adlibris, March 2026 ⁵⁾ Ehandel, March 2026

Convenience boosts e-commerce

E-commerce in the grocery sector continued to grow in early 2026. In the first quarter of the year, growth was 9 percent, which was higher than in physical retail. Growth was driven to a large extent by home deliveries,¹⁾ showing that more people are opting for convenient alternatives.

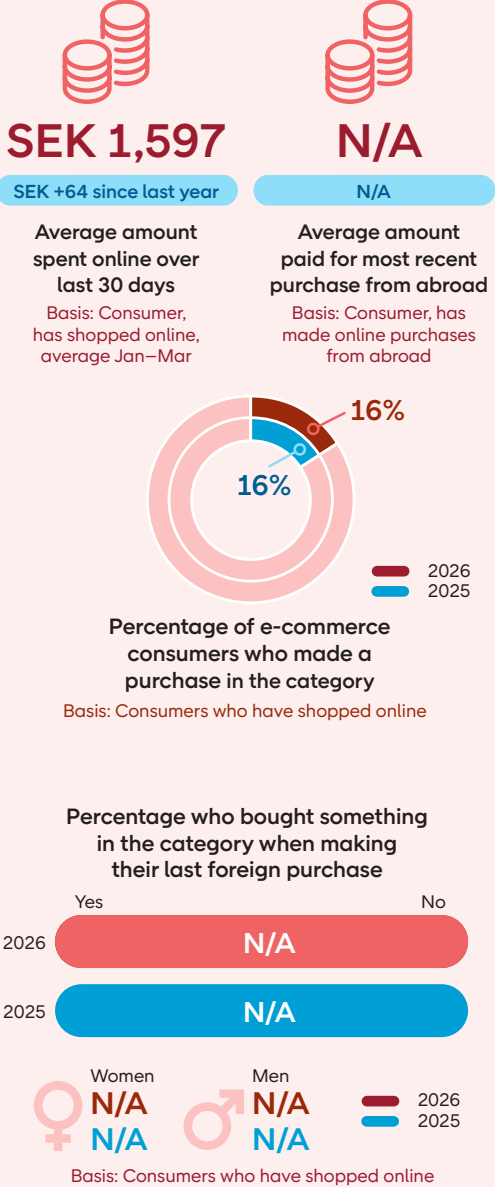
Business models are evolving in line with changing consumer behavior and needs. Wolt has broadened its offering and is shifting its focus from individual stores to products, thereby moving towards a marketplace model.²⁾ Ica is also strengthening its offering to drive growth in e-commerce. For example, it launched the Delivery+ subscription service last year. This service gives customers access to unlimited home or store deliveries for a fixed monthly fee.³⁾

In recent years, some market participants in the sector have faced challenges relating to the profitability of online grocery shopping, but the tide now seems to be turning in that regard. For example, Mathem is showing signs of

recovery after several tough years and a company reconstruction. The company reported a profit in 2025 and describes 2026 as a year of continuing growth and scaling up rather than transition.⁴⁾

In the first quarter, retailers started preparing for the VAT reduction on food introduced on April 1. When Willys reduced the prices in both e-commerce and stores before the end of the quarter, several other market participants also followed suit.⁵⁾ At the same time, there is uncertainty about how great the impact of the reduction will actually be. When VAT on food was reduced to 12 percent in 1996, prices fell initially, which strengthened purchasing power in the short term but had a limited long-term effect.⁶⁾

Time will tell where consumers choose to spend their extra cash; whether they buy more food, opt for convenient options such as home delivery to a greater extent, or simply spend the money in other sectors.



¹⁾ Swedish Food Retail Index, March 2026 ²⁾ Ehandel, January 2026 ³⁾ Ehandel, February 2026 ⁴⁾ Dagligvaruhytt, February 2026 ⁵⁾ Dagligvaruhytt, March 2026 ⁶⁾ Swedish National Audit Office, September 2018

Powering up the electronics sectors

The recovery in the home electronics sector is continuing in 2026. E-commerce growth in the first quarter was 4 percent. However, despite these positive developments, the sector is facing some headwinds. On January 1, the electronics tax was further increased.¹⁾ The electronics industry highlights that the tax increase puts upward pressure on costs for both end consumers and companies.²⁾ This may lead to more consumers turning to international e-commerce to buy equivalent electronics goods at lower prices.

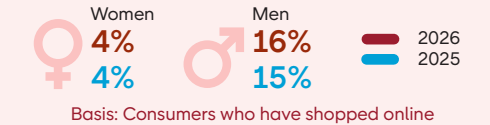
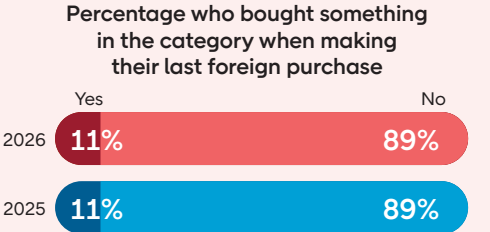
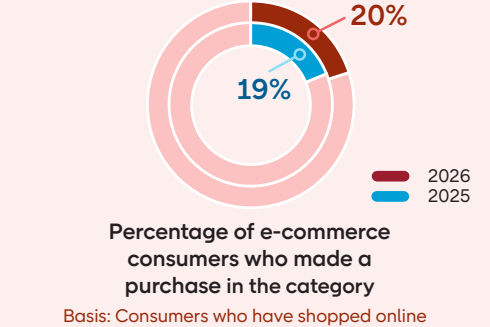
The E-barometer 2025 Annual Report highlights beauty tech as an example of how the home electronics category is moving into the beauty sector. Another sign of how the sectors are intertwining is the venture announced by L'Oréal at the beginning of the year – a 350 million euro investment in an AI-powered Beauty Tech Hub focusing on digital beauty solutions.²⁾

Overlap between sectors is also occurring elsewhere. For example, several market participants, such as NetOnNet, have recently added Lego to their

range of products, and Webhallen have already had such products for a while. During the first quarter of the year, Elgiganten, among others, released a pre-order of premium building sets in collaboration with Lego and Pokémon.³⁾

Another item of news from the first quarter is that Power enhanced its omnichannel offering. By integrating e-commerce and physical stores based on a change in store design, the customer journey will be simplified, for example due to expanded areas for collecting online orders.⁴⁾ With a new CEO, NetOnNet is instead focusing on utilizing the strength of its existing concept, with low prices, self-service and high product knowledge, and considers the greatest potential to be in further refining this rather than changing the entire concept.⁵⁾

Slowly but surely, the sector is continuing to prepare for growth. By finding new ways relating to both the product range and the shopping experience, the sector is continuing to evolve.



¹⁾ Swedish Tax Agency, December 2025 ²⁾ Cosmetics Business, January 2026 ³⁾ Elgiganten, March 2026 ⁴⁾ Ehandel, February 2026 ⁵⁾ Market, February 2026

Personal contact and circular solutions boost retailing

Online sales of clothing and footwear continue to rise, with sales increasing by 5 percent in the first quarter of the year. The increase was driven by, among other things, strong performance in footwear and the premium segment.¹⁾

In parallel with digital developments, there is a growing need to complement e-commerce with more personal elements. Several market participants are investing in events, personal recommendations and pop-up stores, for example. Adoore emphasizes the role of physical stores as a valuable complement to e-commerce and has gone from pop-up to permanent stores.²⁾ H&M is also testing new approaches. Although around 30 percent of sales are made online³⁾, the company has focused on personal interaction, with the opening of a new flagship store. The initiative was carried out through partnerships with cafés, restaurants and bars, in which H&M offers appeared on the menus.⁴⁾ In an increasingly digital everyday life, personal interaction is an important key.

Circular options continue to be an important part of the market. Several traditional e-retailers are investing in circular offerings, which was also highlighted previously in [E-barometer Q1 2025](#). However, experiences are mixed – both Na-kd and Djerf Avenue have previously paused their efforts in this regard, while other market participants have been more successful. At Zalando, for example, it is possible to buy new and used products in the same shopping cart, and 40 percent of global orders consisted of so-called mixed carts in 2025. This initiative is now being developed further to include children's clothing.⁵⁾ This shows that circular business models can work, but they require the right implementation.

Overall, clothing and footwear retailing is continuing to develop steadily, by combining established structures with new ways of working. The combination of increased focus on customer relationships and continued innovation regarding circular solutions is helping shape the sector's future development.



5%

E-commerce growth
Q1 2026



SEK 1,240

SEK +8 since last year

Average amount
spent online over
last 30 days

Basis: Consumer,
has shopped online,
average Jan–Mar

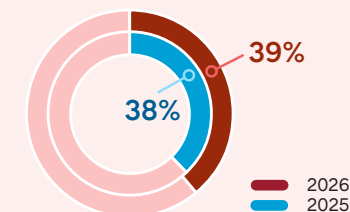


SEK 1,034

SEK +72 since last year

Average amount
paid for most recent
purchase from abroad

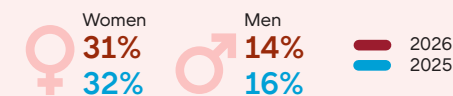
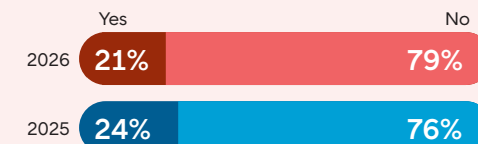
Basis: Consumer, has
made online purchases
from abroad



Percentage of e-commerce
consumers who made a
purchase in the category

Basis: Consumers who have shopped online

Percentage who bought something
in the category when making
their last foreign purchase



Basis: Consumers who have shopped online

Pets and second hand broaden the range

Following last year's double-digit growth, the furniture and home furnishings sector continued to perform strongly in the first quarter of 2026, growing by 11 percent. And activity in the housing market is increasing,¹⁾ which may contribute to further future demand in this category.

A recurring theme in the furniture and home furnishings retail sector is the growth in second-hand sales, which has been highlighted in E-barometer on several occasions. Much of the second-hand retailing is via online platforms such as Tradera, Facebook Marketplace and Blocket. Many traditional market participants are also trying to get a foothold in this area. After testing the concept abroad, Ikea has launched its own second-hand service in Sweden. Sellers can post their goods online and get help with pricing, pictures and measurements while product information is automatically generated.²⁾ The solution is a way of taking control of the second-hand market, while preserving the benefits of consumer-to-consumer sales.

In parallel, the offering is being broadened in other ways in this sector. More and more people are getting pets – and increasingly seeing them as family members, a phenomenon often described as pet parenting, which in turn creates new consumption patterns and business opportunities. During the quarter, Hemtex launched a pet collection for dogs and cats, with a design that has a clearer style and takes into account the entire home.³⁾ Jotex also offers products for pets in its range. These initiatives show how individual market participants are trying to broaden their product ranges to meet related consumer needs.

The furniture and home furnishings industry is in a situation in which several trends are coming together. After a year of high growth, the question is whether development will level off or continue at the same high pace.



SEK 1,990

SEK +599 since last year

Average amount
spent online over
last 30 days

Basis: Consumer,
has shopped online,
average Jan–Mar

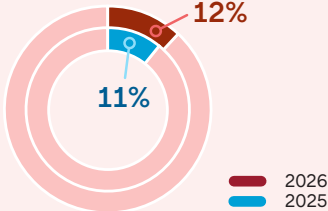


SEK 1,019

SEK +148 since last year

Average amount
paid for most recent
purchase from abroad

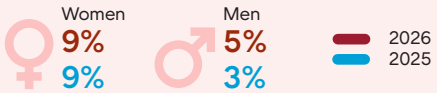
Basis: Consumer, has
made online purchases
from abroad



Percentage of e-commerce
consumers who made a
purchase in the category

Basis: Consumers who have shopped online

Percentage who bought something
in the category when making
their last foreign purchase



Basis: Consumers who have shopped online

¹⁾ Dagens industri, March 2026 ²⁾ Dagens industri, January 2026 ³⁾ Hemtex, January 2026

Beauty under pressure

The beauty sector has grown steadily in recent years. In 2025, the turnover of the beauty industry as a whole increased by about 10 percent compared to 2024.¹⁾

Despite the positive trend, there are signs of a more challenging market and several major market participants have encountered difficulties. Bangerhead has entered a company reconstruction after having been close to being acquired by Parfym.se.²⁾ Lyko has also had to launch a savings package and two rounds of layoffs as a result of high costs³⁾, and the company also declined by almost 5 percent in the first quarter of 2026. This shows that growth does not necessarily result in profitability. However, the development differs among market participants in the sector. For example, Caia continues to deliver strong results and opened its first warehouse outside Sweden during the quarter.⁴⁾

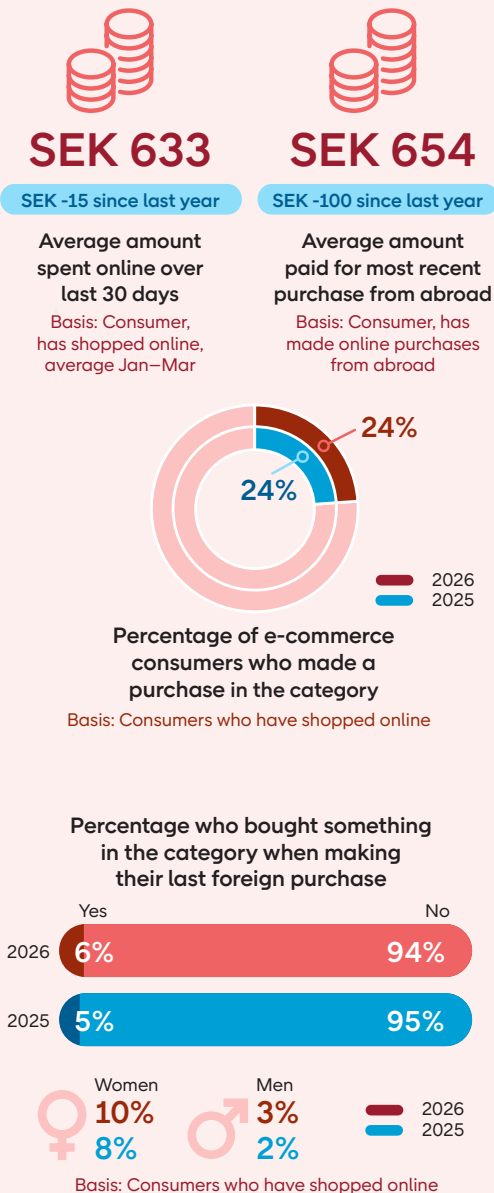
In addition, several market participants in the beauty sector, including Lyko and Kicks, have noted increased price consciousness among consumers, who are increasingly moving away from premium products in favor of more affordable alternatives.⁵⁾ Kicks, for example, has adapted its offering by widening its range and including more products in different price classes to meet changing demand.⁶⁾ However, here too there are market participants who are taking a different approach. Rituals states that its premium segment remains strong despite consumers being more price-conscious.⁶⁾

So, the beauty sector is continuing to grow, but the development is uneven among market participants. As high costs meet increasingly price-conscious consumers, it is becoming clear that growth does not automatically mean profitability, and that simply being visible is not sufficient. What the future holds remains to be seen.

N/A*
E-commerce growth
Q1 2026

¹⁾ Handelsakta, March 2026 ²⁾ Ehandel, January 2026 ³⁾ Lyko, January 2026 ⁴⁾ Ehandel, February 2026 ⁵⁾ Dagens industri, February 2026 ⁶⁾ Market, February 2026

*The Beauty sector does not have sufficient coverage to be able to define growth



Full speed ahead as championships drive sports retailing

After a year of recovery, online sports and leisure retailing continues to develop in the right direction, growing by 10 percent in the first quarter. The snowy start to the year, which covered almost the entire country, gave sports retailing an extra boost.

With several Swedish medals at the Winter Olympics, interest in winter sports also soared. Curling is a clear example. The sport repeatedly gains public interest during championships,¹⁾ although this does not necessarily have a major impact on sales. At the same time, there is strong growth in more established sports such as cross-country and alpine skiing, which showed strong development during the quarter.²⁾ Interest is also evident beyond just sales of new items. Sales of cross-country skis on Tradera increased by more than 70 percent in January compared with the corresponding month in the previous year.³⁾ Shortly after the end of the quarter, the men's

soccer team also qualified for the World Cup this summer, which is expected to provide a further boost to development going forward.

At the same time, the increase in demand for sports products online places higher demands on market participants' logistics. To meet the growing volumes and make the handling of goods more efficient, Intersport has invested in an automated warehouse facility.⁴⁾

Overall, the quarter's figures show how weather, major championships and sporting success can combine to boost sports retailing. From snow-covered ski slopes to ice-covered curling sheets, sporting interest continues to be linked with the occurrence of major championships, and there are strong indications that this linkage will continue going forward, with the soccer World Cup being the next big event.

10%

e-commerce growth
Q1 2026



SEK 1,221

SEK -216 since last year

Average amount
spent online over
last 30 days

Basis: Consumer,
has shopped online,
average Jan–Mar

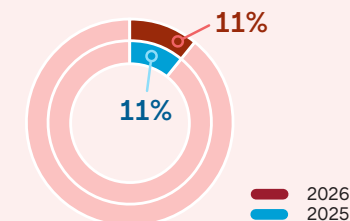


SEK 1,544

SEK +307 since last year

Average amount
paid for most recent
purchase from abroad

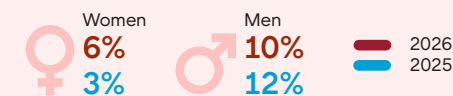
Basis: Consumer, has
made online purchases
from abroad



Percentage of e-commerce
consumers who made a
purchase in the category

Basis: Consumers who have shopped online

Percentage who bought something
in the category when making
their last foreign purchase



Basis: Consumers who have shopped online

¹⁾ Dagens Nyheter, February 2026 ²⁾ Svenskt Sportforum, April 2026 ³⁾ Tradera, February 2026 ⁴⁾ Ehandel, February 2026

International e-commerce starts to stabilize

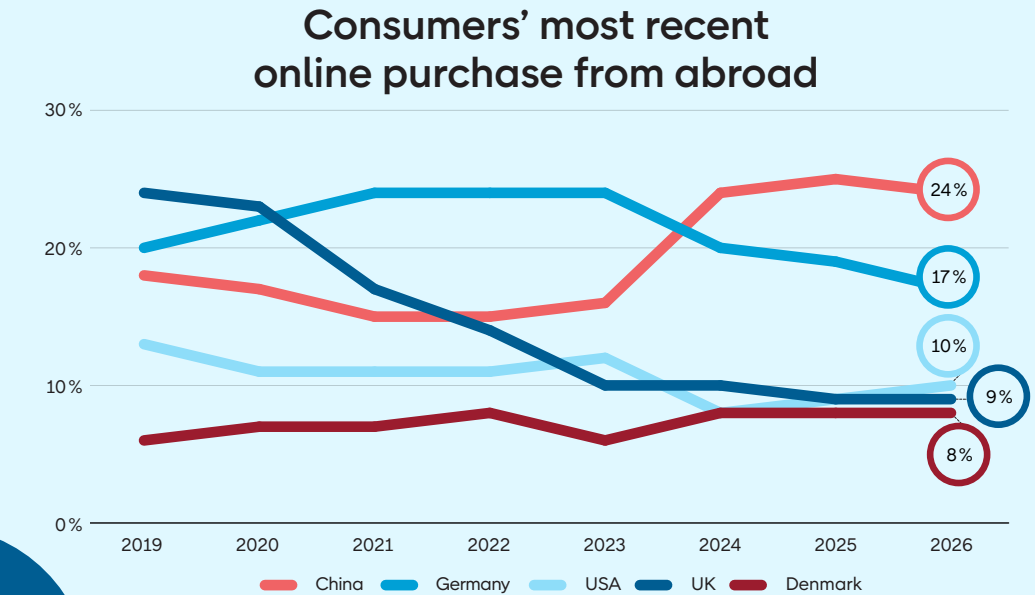
Consumer interest in shopping online from abroad remains high, despite trade barriers and tariffs being widely discussed in the media. Almost half of people in Sweden have shopped online from abroad in the past year, and the most common reasons for this are being able to buy goods that are not available from Swedish e-retailers, followed by lower prices. In particular, consumers who shop online often turn to international market participants. 55 percent of high-frequency e-commerce consumers have shopped from abroad in the past year, compared to 35 percent of low-frequency consumers.

Compared to previous years, the trend has stabilized with regard to the countries from which consumers most often make online purchases. In 2024, there were clear shifts between countries, as China replaced Germany as the most common country of purchase. This year, the changes are smaller, with China holding its ground and Germany losing

some ground. One explanation is that more consumers have now become accustomed to shopping from Chinese e-commerce platforms, so the shifts are smaller. Consumers' views on additional costs such as freight and customs duties have normalized after the peaks in 2025, and the average receipt is now back in line with the 2024 level for China and the US. One contributing factor is that 2025 was marked by a more intense debate on tariffs and duties, which affected consumers' perception of the final cost, even if the cost increases themselves were limited.

Habit and price continue to influence where consumers choose to shop online, while consumers' perceptions of additional costs have stabilized. It remains to be seen whether this stability will continue or whether the new customs rules for non-EU e-commerce parcels, which are expected to come into force this summer, will change consumer behavior going forward.

48%
of consumers have bought goods online from abroad in the last year* (47%)



Basis: Consumer, has made online purchases from abroad in the last year

					
	China	Germany	USA	UK	Denmark
Percentage of most recent foreign online purchase	24% (25%)	17% (19%)	10% (9%)	9% (9%)	8% (8%)
Average receipt	SEK 631 (SEK 550)	SEK 1,363 (SEK 1,359)	SEK 968 (SEK 1,388)	SEK 1,076 (SEK 1,163)	SEK 1,418 (SEK 1,230)

Basis: Consumer, made their most recent foreign online purchase from respective country

*Basis: Consumer, made their most recent foreign online purchase from abroad

China comes with more than just low prices

China continues to be the most common choice for consumers when making online purchases from abroad, and lower prices are still the main attraction. In particular the oldest consumers are happy to go to the Chinese market. One important reason for this is that price is the main reason for them shopping outside Sweden's borders in the first place.

As more people have now tried shopping from Chinese market participants, the shopping experience and sense of security have also improved. When uncertainty decreases, consumers choose to continue shopping. This is reflected in everything from what is purchased to how the reliability of deliveries is perceived.

During the year, China strengthened its position in the vehicle category. The percentage of people who made their most recent purchase from China and chose to shop online in the vehicle category is now closer to Germany, which is traditionally a strong market in the automotive sector. One reason for this is

that Chinese market participants have raised the quality of their products and improved both standards and logistics,¹⁾ thereby helping lower the barriers even for more complex goods such as spare parts and other vehicle accessories. Another explanation is that Chinese car brands are becoming more common in Sweden.

In parallel with this, more consumers also feel that their parcels have been delivered within the promised timeframe, which is partly due to improved logistics. For example, Temu, the favorite company in China among consumers, has invested large amounts in logistics and warehouse management.²⁾

The trend appears to indicate a more mature phase for e-commerce from China. Price remains key, but combined with increased transparency and trust, making purchases from Chinese websites is becoming more accessible, thereby strengthening China's position as an e-commerce location.

58%
of consumers stated that their most recent purchase was delivered within the promised timeframe (53%)



Average receipt:

SEK 631

2025: SEK 550

Average cost over and above the price of the item (shipping, customs duty, etc.):

SEK 29

2025: SEK 57

Main reason for consumers buying from China:

"Lower prices" **66%** (66%)

Consumers' favorite items to buy from China:

	2024	2025	2026
Clothing & footwear	26%	28%	21%
Vehicles	4%	7%	11%
Home electronics	13%	11%	11%

Made their most recent foreign purchase from China:

17% (15%) **37%** (37%)
aged 18–29 aged 65–79

79%

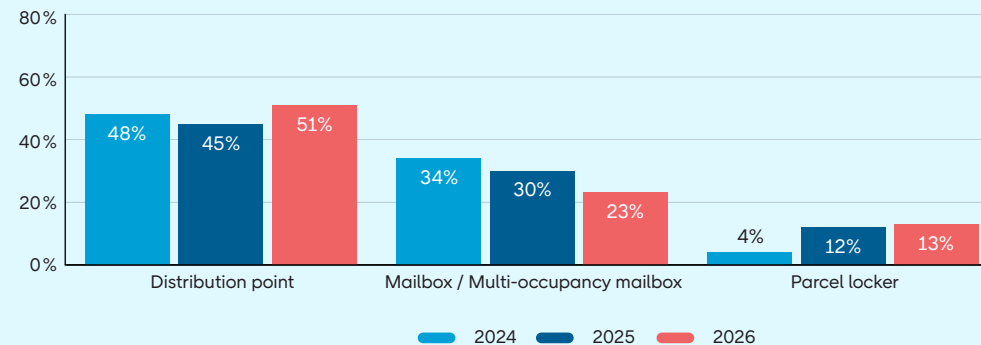
of consumers were of the opinion that the final price in SEK was clear and accurate (78%)



Average delivery time:

China:
15 days (15)
Sweden*:
3 days (4)

How consumers had their most recent online purchase from China delivered



Basis: Consumer, made their most recent foreign online purchase from China

*Basis: Consumer, has shopped online. Source: E-barometern Q2 2025

Lower prices encourages more online purchases from Germany

Germany is still one of the most attractive e-commerce markets for Swedish consumers this year. At the same time, the drivers of purchases have shifted and this year lower prices are the main focus among consumers.

Price is becoming increasingly important when consumers choose a marketplace. In the past, they have mainly turned to German e-retailers to find products that are not available in Sweden, and although this is still an important driver, as stated by a slightly higher proportion of consumers this year than last year, it is price that is of the most importance. One reason for this is that the Swedish krona has strengthened during the year, which has contributed to consumers getting more for their money this year than last year.

In addition, there are clear differences in terms of which consumers buy from Germany and what they buy. Significantly more men than women make purchases from Germany, at 21 percent compared to 11 percent, which is linked to the strength of that market in the areas of home electronics and car accessories, as these are product

categories where men account for a majority of the purchases. Women, on the other hand, dominate purchases of clothing and footwear from the country.

German e-retailers remain in a strong position regarding the shopping experience. 66 percent of consumers say that their parcel was delivered on time and 82 percent state that the final price in kronor was clear and correct. During the year, the perceived additional costs also fell significantly, from SEK 130 to SEK 51, which is in line with the level in 2024. The 2025 debate about tariffs may have increased the concerns about fees even for intra-EU trade, despite the fact that the single market has largely eliminated them.

Swedish consumers shop online from Germany because of its low prices, wide range of products and reliable shopping experience, but the percentage of people making purchases from there has decreased slightly since last year. As competition from other markets increases, it is becoming increasingly important for German online retailers to differentiate themselves from others.

66%
of consumers stated that their most recent purchase was delivered within the promised timeframe (68%)



Average receipt:
SEK 1,363

2025: SEK 1,359

Average cost over and above the price of the item (shipping, customs duty, etc.):

SEK 51

2025: SEK 130

Main reason for consumers buying from Germany:

"Lower prices" **54 % (45 %)**

Consumers' favorite items to buy from Germany:

	2024	2025	2026
Clothing & footwear	21%	25%	21%
Vehicles	11%	12%	15%
Home electronics	16%	11%	12%

Made their most recent foreign purchase from Germany:

14% (18%) **17%** (18%)
aged 18–29 aged 65–79

82%

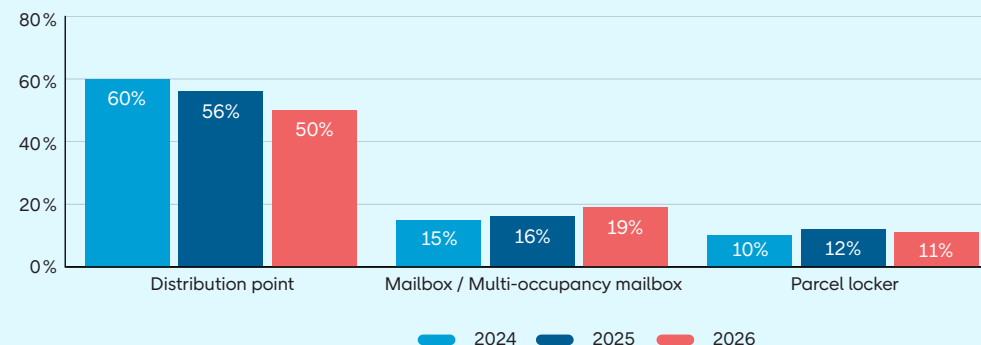
of consumers felt that the final price in SEK was clear and accurate (81%)



Average delivery time:

Germany:
7 days (7)
Sweden*:
3 days (4)

How consumers had their most recent online purchase from Germany delivered



Basis: Consumer, made their most recent foreign online purchase from Germany

*Basis: Consumer, has shopped online. Source: E-barometer Q2 2025

Attitude and actions diverge, more people buying items from the US

Swedish consumers continue to make online purchases from the United States, despite the recurring media discussions about US policies and tariffs. The media reports that many consumers are choosing to boycott US products,¹⁾ but at the same time the percentage of people who made their most recent foreign e-commerce purchase from the US has actually increased slightly compared to last year, from 9 percent to 10. The uncertainty created by political utterances does not seem to have had a significant impact on e-commerce. Consumer attitudes and actual purchasing behavior are not always fully aligned.

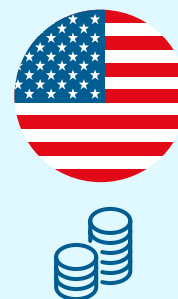
Consumers between the ages of 18 and 29 are the main consumers making online purchases from the United States. One explanation for this is that their purchasing decisions are particularly shaped by social media, where American goods often go viral, for example via platforms such as TikTok, which is where consumers often find inspiration for their next purchase. Phenomena such as "curiosity detours" mean that consumers

start a search and are quickly led to new products and brands.²⁾

In addition, there is a clear improvement in the shopping experience. Consumers perceive that the final price is clear and accurate, and the delivery time is perceived to have halved and is back to the 2024 level. Several factors may explain this. On the one hand, e-retailers may have become better at clearly communicating the total cost. On the other hand, last year's strong focus on tariffs and trade barriers may have affected consumers' expectations regarding price and delivery, making the experience now appear better. This is also reflected in the average receipt, which is now back at the 2024 level.

The trend shows that Swedish consumers continue to shop from the United States for specific goods, despite it being a more uncertain retail environment. For e-retailers, it will be important to meet consumers' expectations regarding both product range and clarity throughout the purchase journey.

50%
of consumers stated that their most recent purchase was delivered within the promised timeframe (47%)



Average receipt:

SEK 968

2025: SEK 1,388

Average cost over and above the price of the item (shipping, customs duty, etc.):

SEK 97

2025: SEK 413

Main reason for consumers buying from the US:

"The items were not available on Swedish sites" **76 % (72 %)**

Consumers' favorite items to buy from the US:

	2024	2025	2026
Clothing & footwear	22%	22%	18%
Books & media	15%	11%	15%
Home electronics	7%	9%	13%

Made their most recent foreign purchase from the US:

16% (13%) **6%** (6%)
aged 18–29 aged 65–79

67%

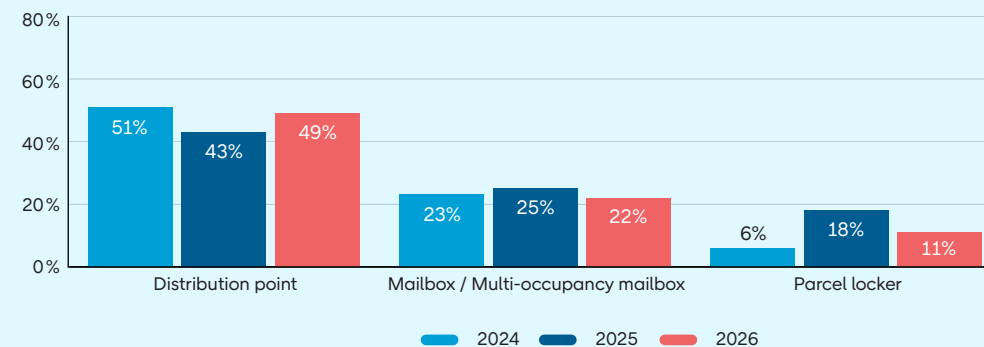
of consumers felt that the final price in SEK was clear and accurate (49%)



Average delivery time:

USA:
12 days (21)
Sweden*:
3 days (4)

How consumers had their most recent online purchase from the US delivered



Basis: Consumer, made their most recent foreign online purchase from the US

*Basis: Consumer, has shopped online. Source: E-barometern Q2 2025

Choice outweighs hassle regarding UK e-commerce

This year, the UK is the fourth most common market for the most recent foreign online purchase among people in Sweden, with 9 percent buying from there when they last shopped online outside Sweden. The United States has increased by one percentage point to take third place by a narrow margin. However, it is not just about positions in the rankings. Both the UK and the US are markets that are particularly attractive to consumers because it is possible to find goods there that are not available from Swedish e-retailers.

No less than 74 percent state they shop from the UK to get goods that are not available on Swedish sites. UK online retailers are also associated with attractive brands and unique product ranges, making the market particularly relevant for consumers looking for inspiration and new trends. These buying behaviors are particularly evident with regard to fashion. Demand for clothing and footwear remains stable and has increased by 3 percentage points compared to last year.

However, the UK is an outlier with regard to the shopping experience. Fewer consumers feel that their purchase was delivered within the promised timeframe and that the final price was clear, both compared to last year and compared to other popular markets. Only 47 percent say that the purchase was delivered by the promised date and the percentage of those who feel that the final price was clear has decreased from 62 to 54 percent. However, the UK and the EU are discussing a possible "reboot" of their relationship after Brexit, with the aim of reducing the number of trade barriers, which could improve the consumer shopping experience going forward.¹⁾

Despite the perceived hassle, many people continue to shop from the UK. In other words, in some cases, the uniqueness of the product range outweighs the need for a transparently reliable shopping experience. In the long run, however, the balance is sensitive; if friction increases, demand may also be affected.

47%
of consumers stated that their most recent purchase was delivered within the promised timeframe (55%)



Average receipt:
SEK 1,076

2025: SEK 1,163

Average cost over and above the price of the item (shipping, customs duty, etc.):

SEK 91

2025: SEK 246

Main reason for consumers buying from the UK:

"The items were not available on Swedish sites" **74 % (81 %)**

Consumers' favorite items to buy from the UK:

	2024	2025	2026
Clothing & footwear	38%	25%	28%
Books & media	15%	12%	15%
Beauty & health	7%	12%	9%

Made their most recent foreign purchase from the UK:

11% (13%) **8%** (7%)
aged 18–29 aged 65–79

54%

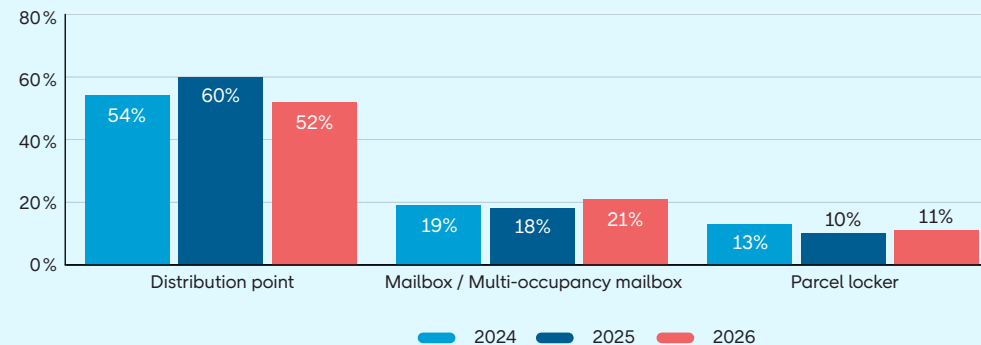
of consumers felt that the final price in SEK was clear and accurate (62%)



Average delivery time:

UK:
9 days (10)
Sweden*:
3 days (4)

How consumers had their most recent online purchase from the UK delivered



Basis: Consumer, made their most recent foreign online purchase from the UK

*Basis: Consumer, has shopped online. Source: E-barometern Q2 2025

Danish design generates interest in Sweden

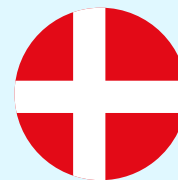
Sweden is an important e-commerce destination for Denmark, and Swedish consumers also like making purchases from Denmark. Proximity, both geographically and culturally, helps consumers feel safe and confident with this market.

Clothing and footwear continues to be the most popular category of goods to buy from Denmark. Social media trends tend to give a certain boost to sales and in recent years hashtags such as #CopenhagenStyle have been trending on social media.¹⁾ However, interest in fashion goods has weakened compared to last year. This year, interest in Danish home electronics, furniture and home furnishings is increasing. Regarding interior design, a perceived gap in the product range may have some bearing, with Danish design continuing to perform well. In terms of home electronics, the lower electronics tax in Denmark is contributing to increased demand from Sweden, not least because the electronics tax has been increased once again in Sweden.²⁾ In addition, the Swedish krona has strengthened against the Danish krona, meaning consumers get more for their

money. This benefits purchases of more expensive home electronics and furniture in particular, as these are purchases that many consumers have previously postponed due to tough economic times.

Consumers also feel that the delivery of their goods has become both more reliable and faster. 7 in 10 consumers state that their most recent purchase from Denmark was delivered within the promised timeframe, compared to 6 in 10 last year, and delivery time is perceived to have shortened by a third. Consumers in Sweden are generally of the opinion that Danish online stores offer low prices and a unique range, as well as relevant delivery options and smooth payment solutions. These characteristics are crucial for consumers at the checkout.

In a world characterized by geopolitical fluctuations, Denmark is perceived as being a stable and frictionless e-commerce market for Swedish consumers. Denmark has become a safe, low-risk alternative in an otherwise relatively shaky geopolitical environment.



Average receipt:

SEK 1,418

2025: SEK 1,230

Average cost over and above the price of the item (shipping, customs duty, etc.):

SEK 40

2025: SEK 59

73%

of consumers stated that their most recent purchase was delivered within the promised timeframe (64%)

Main reason for consumers buying from Denmark:

"The items were not available on Swedish sites" **48 % (50 %)**

Consumers' favorite items to buy from Denmark:

	2024	2025	2026
Clothing & footwear	15%	30%	18%
Home electronics	18%	12%	18%
Home furnishings and furniture	12%	8%	13%

Made their most recent foreign purchase from Denmark:

5% (2%) **7%** (9%)
aged 18–29 aged 65–79

88%

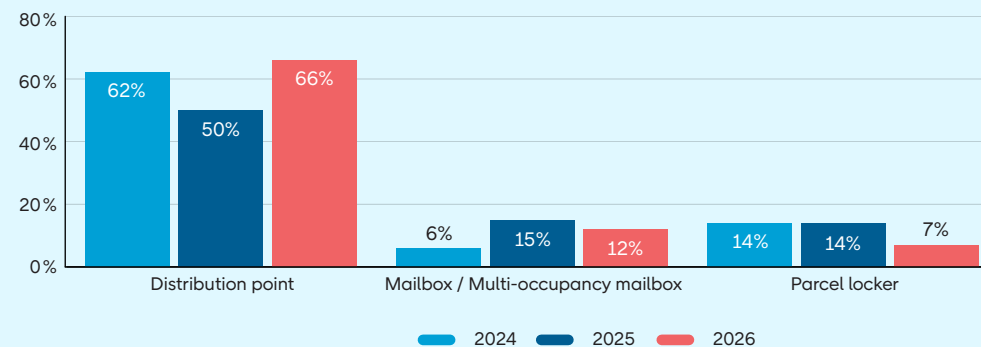
of consumers felt that the final price in SEK was clear and accurate (88%)



Average delivery time:

Denmark:
6 days (9)
Sweden*:
3 days (4)

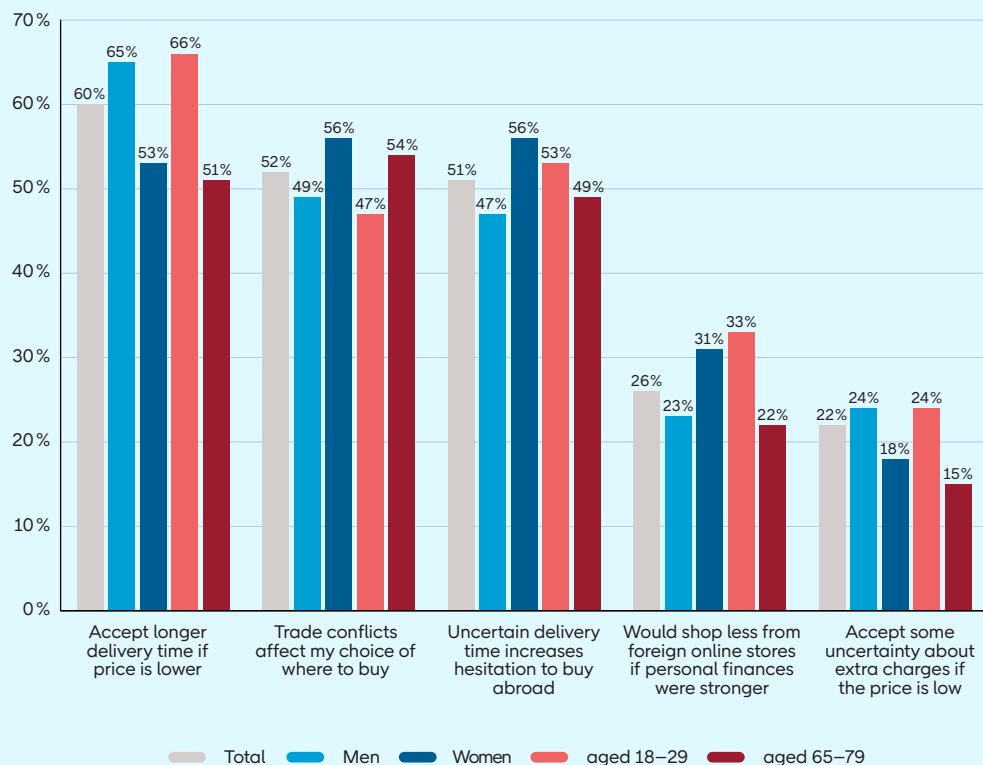
How consumers had their most recent online purchase from Denmark delivered



Basis: Consumer, made their most recent foreign online purchase from Denmark

*Basis: Consumer, has shopped online. Source: E-barometer Q2 2025

Percentage of respondents who agree regarding statements about shopping from foreign online stores



Basis: Consumer, has made purchases from online stores abroad in the last year

Low price outweighs risk – but not for all consumers

Swedish consumers are generally amenable to shopping from foreign online stores, especially if the price is low enough. At the same time, consumers' willingness to accept risk and uncertainty clearly varies with age and gender.

When price is sufficiently attractive, delivery time and uncertainty about charges become less important to consumers. 6 in 10 say they are willing to wait longer for their parcel if they save money, and 2 in 10 are prepared to accept some uncertainty about extra costs if the price is low. This is particularly evident among people aged 18–29 and among men. Men are more likely to make purchases in more capital-intensive sectors, such as home electronics and vehicles, where price differences between markets can be large. Younger consumers are more likely to buy clothing and media, where the price and thus the risk per purchase is usually lower.

At the same time, the uncertain global environment is affecting where consumers choose to shop. This is particularly evident among older consumers and women. 56 percent of female consumers and 54 percent of people aged 65–79 say that political and commercial factors influence their choice of place of purchase. Women are also more likely than men to say that they would reduce their purchases from abroad if their personal finances improved. This shows that price continues to be an important driver, but also that other factors, such as sustainability,¹⁾ are becoming more important as financial pressures ease.

Price remains a key driver, but the degree of uncertainty consumers are willing to accept varies. It is crucial that e-retailers keep themselves informed about global developments and how geopolitical changes affect consumer behavior.

¹⁾ E-barometer 2025 Annual Report, page 40

Uncertainty has shifted from market participant to product

Despite the growing number of consumers making online purchases from abroad, the lack of certainty and control remain key reasons for some people not to do this. At the same time, developments show that many of the traditional barriers, such as consumers not trusting market participants or finding what they want in the product ranges of e-retailers, have decreased and that foreign e-commerce has increasingly become a natural part of consumers' daily lives.

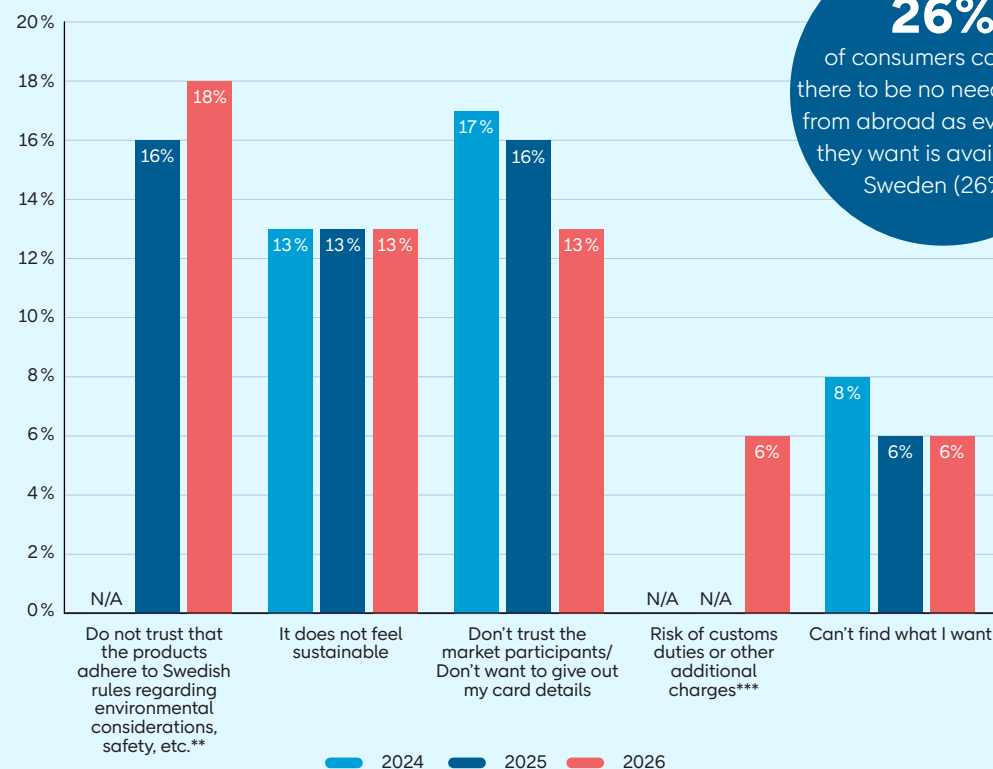
Confidence in foreign market participants has increased over time. Compared to previous years, the share of consumers who do not trust foreign market participants has decreased. Instead, the uncertainty is more about the product, with more people questioning whether it meets Swedish requirements. Female consumers and consumers aged 65–79 have a particularly low level of trust in products from foreign e-retailers. One explanation for this is that both these groups are generally more risk-averse, which contributes to a more cautious and carefully-assessed purchase journey. Women are

also planning to prioritize sustainability more in their online purchases in 2026,¹⁾ which is one explanation for the suitability of products from foreign market participants being questioned to a greater extent.

During the same period, practical barriers have become less prominent. Today, fewer consumers refrain from making a purchase from abroad because they cannot find what they are looking for. Tariffs and charges also do not appear to be a decisive barrier, but have about the same importance as not finding the right product. Younger consumers are the most likely to say they refrain from making a purchase because of these costs, partly because they are most active in markets in which the risk of extra charges, such as the US and the UK, is higher.

The barriers remain but have been lowered. Foreign e-commerce is now a natural part of consumers' purchasing habits, with choices increasingly being made at the moment of purchase, on the basis of range, price and perceived certainty and safety.

Main reasons why consumers choose not to make purchases from abroad



26%
of consumers consider there to be no need to shop from abroad as everything they want is available in Sweden (26%)*

Basis: Consumer, has not made purchases from online stores abroad in the last year

*Basis: Consumers who have shopped online

**New response option in 2025

***New response option in 2026

"Selling via Zalando also gave us an understanding of local regulations and consumer laws, which made it easier to take the next step."

Andreas Malmström, CCO of Bubbleroom



E-retailers' top 3 largest foreign markets



Norway



Denmark



Finland

60%

of companies have sales abroad*

Basis: E-commerce company, has sales abroad

*Basis: All e-retailers



"Scalable international expansion involves being disciplined. Believe in the product, avoid over-adapting too early and choose markets with reasonable conditions. Test, measure and adjust – and let customer behavior guide the next step."

Hanna Blixt, COO of RevolutionRace

More people dare to export, but local requirements are crucial

More and more Swedish e-retailers are targeting consumers outside Sweden. However, this expansion is taking place in an environment in which Sweden's total export development has been subdued and 2025 ended with a negative development after several positive quarters.¹⁾ This places higher demands on how companies choose to grow.

For many market participants, the first step is to understand the new market. Local consumer purchasing laws influence product ranges and profitability, so adaptation is required right from the start. Digital marketplaces can lower the barriers by providing quick access to a new and broad customer base and information on how the market works. These are often used as a first point of entry, with the aim of eventually guiding consumers to the e-retailers' own channels.¹⁾ This is highlighted by Andreas Malmström from Bubbleroom.

Once the e-retailer has established a presence, localization is crucial for

successful conversion. Consumers expect to be able to shop in their own language, with local payment and delivery options, otherwise they often do not complete the purchase at the checkout. However, it is also difficult to know in advance exactly what works in a new market. The way in which companies work therefore becomes a central aspect. One concept is to continuously test, measure and adjust, based on what actually drives conversion in each market; this is something that Hanna Blixt at RevolutionRace highlights as being crucial for the company's international expansion.

To summarize, international expansion requires a balance between local adaptation, the right choice of channel, and a clear product offering, with Swedish e-retailers often succeeding by daring to test. At the same time, local purchasing laws and regulations provide a clear framework, making adaptation not only an opportunity but also a necessity.

¹⁾ Shopify, August 2025

How simpler rules can boost e-commerce for small businesses in the EU

Sweden has thousands of small and medium-sized enterprises. They form the backbone of the Swedish economy, accounting for 99.9 percent of all companies in Sweden, and almost 60 percent of GDP.¹⁾ In the EU, there are more than 100,000 small and medium-sized enterprises that currently sell via Amazon.²⁾ **Helena Hånell McKelvey, social policy manager for Amazon in the Nordic region, believes that the EU and Sweden have a lot to gain by making it easier for these companies to export more.**



**Helena Hånell
McKelvey**

The purpose of the EU single market is to make it easy for businesses to sell across borders. But many small businesses exporting within the EU describe a very different reality. Red tape, administrative burdens and different national interpretations can

make cross-border trade much more complicated than it could be.

“Sweden has long been an exporting country, and allowing entrepreneurs to grow abroad is important for our competitiveness. As more and more retailing moves to digital sales channels, we also need to adapt regulations to make it as easy as possible to sell across borders,” says Helena Hånell McKelvey.

However, Helena points out that the regulatory burden affects small market participants disproportionately hard, despite the fact that they are often the most innovative and agile businesses.

“Many companies I meet currently feel that the regulations differ too much between countries. These range from VAT registration and reporting requirements to product rules, languages and specific national solutions. For a small business without a legal or administrative department,

the barrier to entry quickly becomes very high.”

The EU can still feel more like 27 different markets than one common market: this leads to both costs and uncertainty. In a survey conducted by Implement Economics,³⁾ 88 percent of small businesses stated that they would be able to increase their exports if Member States implemented EU regulations at the same time and in the same way.

As small businesses are the backbone of Europe's economy, it needs to be easier for them to sell in the single market. This would benefit businesses, consumers and Europe as a whole. Helena describes what small business owners can focus on to succeed with exports.

“Marketplaces, such as Amazon, allow small businesses to reach several countries at the same time by providing support such as international product listing, AI services and logistics services, which jointly facilitate exports.”



The EU single market

The EU single market was created in 1993 and allows goods, services, people and capital to move freely throughout the Union. This means that, among other things, there are no tariffs between countries and that goods legally sold in one EU country can generally also be sold in the other countries. The aim is to strive toward having common harmonized rules, which currently exist in areas such as product safety and consumer protection.⁴⁾

¹⁾ Ekonomifakta, companies per size class, May 2025 ²⁾ Aboutamazon, April 2026 ³⁾ Implement Economics, April 2026 ⁴⁾ European Council



Three suggested solutions for cutting red tape

Digital labeling: The EU has adopted the Ecodesign for Sustainable Products Regulation, which stipulates the requirement for a Digital Product Passport (DPP). This means that all products sold in the EU will have to be labeled with a digital identity that provides information about materials, reparability and recyclability, for example via a QR code. The central EU DPP register will be launched on July 19, 2026, with the first product requirements being introduced in from 2027.

The DPP can simplify procedures for exporting small businesses by replacing different national labeling requirements with a common digital standard. But this requires uniform implementation in all Member States, otherwise the DPP risks becoming another layer of regulatory burden.

Simplification of the extended producer responsibility: The product recycling landscape is fragmented, with over 100 different regulations imposing large and disproportionate costs on small businesses. An EU-wide digital one-stop-shop for producer responsibility would allow companies to manage their registration and reporting via a single digital platform

– regardless of how many Member States they sell in.

This would simplify registration, reporting and compliance compared to today, as there are currently several different national systems. Businesses want harmonized administrative procedures and reduced costs, so that it is easier to sell across borders.

VAT compliance: VAT accounts for around one fifth of all tax revenue in the EU, but complying with VAT rules on cross-border sales is often complicated.

Currently, online retailers – including Amazon – are required to collect VAT for foreign sellers in the EU in a single place, while EU sellers have to administer VAT via different national authorities. This creates a paradox where, in practice, it can be easier for non-EU companies to sell in the single market than for the EU's own small businesses.

The EU's VAT in the Digital Age (ViDA) package, which was adopted in March 2025 and entered into force in April that year, is an important step in the right direction. This extends the One-Stop-Shop (OSS) system to allow businesses to declare VAT on

all EU sales via a single registration. The system will be fully operational by July 1, 2028.

The timely and uniform implementation of ViDA by all Member States is crucial for truly simplifying the everyday work of small e-commerce businesses.

Amazon in Sweden

Amazon.se was launched in Sweden in October 2020. For Swedish customers, there are currently hundreds of millions of products to choose from in 30 different categories.

Small and medium-sized businesses from EU countries exported more than EUR 17 billion via Amazon in 2025, of which EUR 13.5 billion was within the EU.

There are currently over 1,000 Swedish small and medium-sized businesses on Amazon.se, and three quarters of them sell internationally. Since 2020, Swedish companies have sold products worth more than SEK 9.5 billion via Amazon.

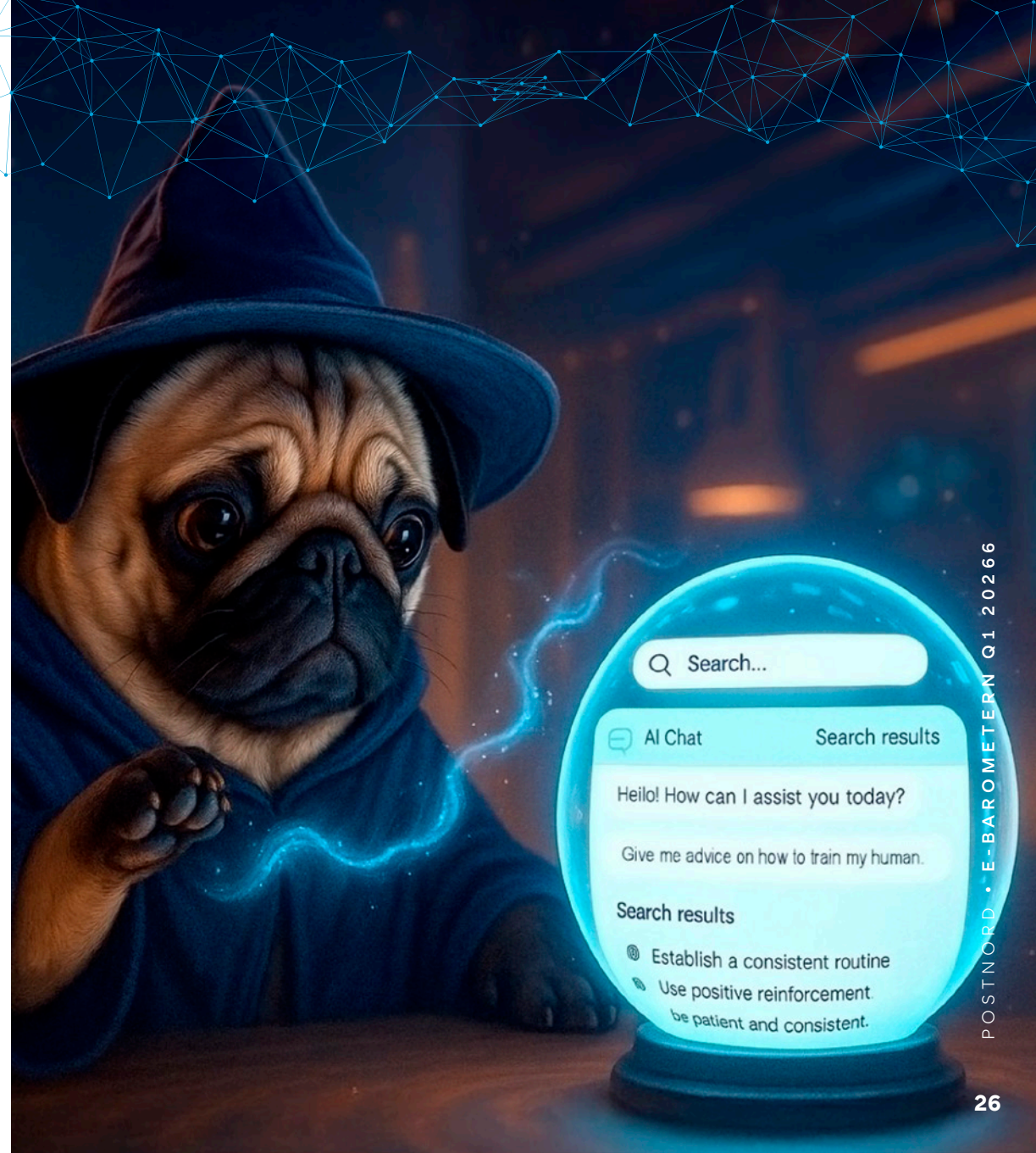
From SEO to AEO – how AI is changing our online search behavior

For over 20 years, SEO has been a key part of e-retailers' online visibility. But with the arrival of AI, the situation is changing. Instead of achieving keyword based ranking, AEO – Answer Engine Optimization – involves making the content so clear and relevant that AI selects it as part of the provided answer. At the same time, more of the customer journey involves AI tools, leaving the e-retailer with a new role at the end of the purchase.

“You become more of an end point than a starting point. Your site gets less traffic, but a higher conversion rate for those who actually click in,” says Christian Rudolf, CEO and founder of SEO agency Topdog.

AI is re-drawing the map of how we search for, find and buy products online. For a long time, e-retailers have been optimizing their sites so that they appear high up in Google search results. This has involved identifying which keywords customers use, and getting ranked via them. That logic has been relatively stable. It has been possible to map demand, analyze volumes and optimize content accordingly. There has been a clear link between keywords, visibility and traffic.

But, as AI-based search and assistant tools such as ChatGPT, Gemini, Claude, Perplexity and Copilot become more commonplace, the situation is fundamentally changing. Instead of presenting a list of links, AI delivers a ready-made answer. This means that, in many cases, the user no longer needs to click through to compare options or gather information, as that work has already been done in the tool. This changes not only how the result is presented, but also





Christian Rudolf

Christian Rudolf is the CEO and founder of the SEO agency Topdog. He has worked in the field of search optimization for more than 15 years, helping both e-retailers and larger organizations develop their digital visibility.

"With SEO, sometimes simply having a backpack is sufficient. With AI, you need to have the right backpack, for the right family, for the right weather, for the right situation."

how much of the value in the search is moved away from the click itself.

"The big change is that the user gets a result in which much of the work has already been done. Instead of having to then do the comparison yourself, you are presented with options that have already been assessed," says SEO expert Christian Rudolf, who has worked in search optimization for a long time and now analyzes how AI is affecting this area.

The change is clearly visible in how people formulate their questions. In traditional searches, the questions are short and often quite general. In AI searches, they are longer, more contextual and much more precise – sometimes including needs, situations and preferences. It also means that the search itself becomes less standardized and more varied, making it harder to predict exactly how users will formulate their questions.

Christian uses a hypothetical example to illustrate the difference. In Google, the user searches for "hiking backpack". But, in an AI tool, the same user

describes the whole situation: going to the mountains with their kids, having a certain budget and needing a backpack that can withstand challenging weather conditions. Not only does the question become more detailed, it also becomes more decision-driven and closer to an actual purchase decision.

This means that the task of the e-retailer changes from matching a keyword to meeting a need in its entirety. Instead of optimizing for individual words, the content and data need to respond to the user's overall situation.

"With SEO, sometimes simply having a backpack is sufficient. With AI, you need to have the right backpack, for the right family, for the right weather, for the right situation," explains Christian.

At the same time, behind the user's question there is a more advanced process than in traditional search engines. AI systems break down each prompt into several smaller parts and analyze different aspects in parallel. These can be anything from function and target group to price expectation, area of use and availability.



In practice, this means that a single question corresponds to a whole cluster of smaller investigations. Information is gathered from multiple sources and weighed together to in one answer, with different sources contributing different parts of the whole. It also means that e-retailers no longer compete to be best regarding a single result – but instead regarding several parts of the same decision-making process.

"It is no longer one search anymore, but many searches. Ranking well on a specific word is not enough, retailers need to be relevant in several dimensions at the same time," says Christian.

This means that visibility is no longer →

SEO vs. AEO

SEO (Search Engine Optimization):

- Optimizing based on what people search for
- Main aim is to boost ranking in search results
- Drives traffic

AEO (Answer Engine Optimization):

- Optimizing based on what AI understands and chooses
- Involves being the answer
- Drives decisions

How to become visible in AI responses – 3 things you can do right now

1. Define the foundation in SEO and the structure

Clear structure, smooth UX and fast loading are still crucial. Without a solid foundation, it will be difficult for AI systems to interpret and use your information correctly. Avoid duplicate or competing content and be consistent in how you describe your product offering.

2. Build richer and more contextual product data

Describe not only what the product is, but for whom it is suitable, in what situations it is used and why it is relevant. The more context you provide, the easier it will be for AI to match your content to user needs.

3. Create clarity and credibility in multiple channels

Make sure you are represented in several external sources – such as reviews, guides and comparison sites. AI builds up its understanding based on the whole picture, not just how you describe your brand in your own channels.

“AI gathers information from multiple sources, ranging from databases and structured product information to external platforms such as reviews and guides.”

determined by a single element, but by how well an e-retailer covers several parts of the need simultaneously. It also blurs the line between content and data. In the past, much of the focus has been on content – product texts, guides and inspiration. In an AI-driven environment, the structure becomes at least as important, as the information must be clear enough to be interpreted mechanically by a robot.

Many e-retailers today have basic information about their products, such as price, category and sometimes target audience. But what is often missing is what makes the product understandable in its context.

“You have to be able to describe how and when the product is used, by whom and why. If you can give a better picture of who it is relevant to and in which situation it is most useful, you will do better in AI search,” explains Christian.

To be selected as content in an AI answer, it is not enough to optimize your own website. AI draws information from multiple sources, ranging from databases and structured product

information to external platforms such as reviews and guides. This means that e-retailers need to be present in three layers at the same time: on their own website, in their product feeds and in external sources in which the brand is described and evaluated.

Visibility is thus built across multiple touchpoints, and this also changes how brands are shaped. In an AI-driven search world, the collective picture from multiple sources outweighs your own communication.

“AI is trying to find a consensus. This means that even old information can be of great importance. Content published many years ago can still influence how a company is described, especially if there is not enough new information to outweigh it.”

“Reviews will be even more important in the future. It is not enough to have a presence and describe yourself well, as positive reviews from others will become even more important,” continues Christian.

For companies that have changed their product offering, this means they

have a new responsibility to work on their presence more broadly, not just on their own site, but across the entire content ecosystem in which they have a presence.

At the same time, far from all e-retailers have adjusted enough so far to be able to benefit from these changes. Many are still struggling with fundamental SEO issues. Key aspects like structure, clarity and technical quality – things that already affect visibility today, but will have an even greater impact in an AI-driven environment.

A clear example is duplicate content, i.e. content that is repeated in several places on your site. When multiple pages compete for the same purpose, it creates ambiguity, for both users and systems.

“If you have several pages covering the same thing, the AI bot won't know

which one of them is most important. So you still need to do the basic SEO work and revise the structure to increase your chances of being picked up when AI makes the selection,” says Christian.

Another challenge is understanding what is actually happening. In traditional SEO, there are clear data points – keywords, rankings and clicks. In AEO, much of what happens is harder to follow, as the process is largely hidden and does not leave the same traces. There is simply no clear data to rely on.

As a result, many of the tools and practices that e-retailers are used to using are not really sufficient. Instead, the industry is trying to find new ways to replicate user behavior, often by simulating how users might formulate their questions.

“We no longer have the same transparency. There is no real prompt data →



to work with, and much of what exists today is based on estimates.”

These types of simulations can provide some direction, but also involve uncertainty regarding how well the data reflects reality. It is not actual users that are measured, but instead models of user behavior.

“SEO tools try to recreate prompts and measure visibility that way, but in practice it becomes a model of reality, not reality itself.”

This increases the risk of misinterpretation, especially for organizations that are used to making decisions based on clear data points. What was previously a fairly precise discipline suddenly becomes more interpretive.

“It is easy to think you have it all figured out, but don’t forget that what you’re looking at are really just estimates of what we think users are looking for when using AI.”

Christian therefore believes that the focus needs to be shifted back to what can actually be measured, which is business transactions. As visibility becomes more difficult to track, the impact needs to be given more weight. Rather than optimizing for individual keywords, there needs to be more focus on understanding behaviors and intentions – what the user actually wants to achieve, and how different types of questions can lead onward in the purchase journey.

“Much of the research is done in AI. One then goes to the e-retailer for the purchase. You become more of an end point in the transaction rather than a starting point.”

“The best way to measure is still to look at traffic and conversions. What actually leads to business transactions? There needs to be more focus on understanding behaviors than following individual keywords.”

At the same time, the traffic pattern itself is changing. As more of the information gathering is done in AI tools, the need to click through to different sites is reduced. A larger part of the selection takes place before the user even leaves the tool.

This may seem like a problem at first glance, but in practice it is a displacement rather than a loss. The traffic that does actually get to the site is of a higher quality. This means there needs to be a shift from maximizing reach to maximizing relevance, and from getting many visits to getting the right visits.

“There will definitely be less traffic to e-retailers’ sites. But the traffic that does come will be more decision-oriented. You lose volume, but you get better quality.”

As AI tools take a bigger role in the purchase journey, the location at

which value is created is also changing. Comparisons, analysis and selection increasingly take place outside the e-retailer’s own platform.

This changes the role of e-retailers. From being a place where customers orientate themselves and discover options, to being the point where the decision is actioned.

“Much of the initial research before the purchase is done in AI. The buyer then goes to the e-retailer and makes the purchase. You become more of an end point in the transaction rather than a starting point. There is not as much “just looking” traffic. But more “I know what I’m going to buy” traffic.”

In parallel with this, the trend is toward creating more personalized shopping experiences. Instead of generic lists, AI can adapt answers to the user’s needs, behavior and circumstances.

In the long term, the trend could go even further. AI agents that not only recommend products, but which also act on the information, are starting to take shape. In such a scenario, systems can communicate directly with

each other, retrieve relevant data and in some cases even make purchases.

But Christian Rudolf emphasizes that the current developments should not be over-dramatized. Although AI and AEO have changed behavior rapidly, the development is not as fast as it is sometimes portrayed as being. This also means that e-retailers have time to adapt.

“The shift will take time. And even if you, as an e-retailer, feel that you are lagging behind, there are still good opportunities to catch up. You can take it step by step, and every improvement you make in terms of structure, content, technology and analysis will have an impact.”

For those market participants already working in a structured way with SEO, much of what is required going forward is familiar. In such cases, it is less about making big changes, and more about doing the right things more consistently.

For e-retailers, it is therefore not about choosing between SEO and AI, but about understanding how they are connected to and reinforce each other. Anyone who is not fundamentally well organized will find it difficult to be seen, regardless of the channel.

“AEO without normal SEO does not work. Everything starts with structure, clarity and order in the data,” concludes Christian.

AI search vs. Google – usage in practical terms

A small part is product-related in AI
It is estimated that around 2 percent of all prompts in ChatGPT are about products. In comparison, it is estimated that around 8–10 percent of searches in traditional search (e.g. via Google) are directly commercial.*

Larger total volume in Google – so far
Rough estimates point to around 10–12 million product-related searches per day in Sweden via Google, compared to around 1 million via AI tools.*

Longer and more complex searches in AI
A traditional search using, for example Google, consists of 5–6 words on average. In AI tools, an average prompt is estimated to be around 70 words.*

*All figures are estimates based on industry data and should be interpreted as indicative rather than exact measurements. AI tools still lack transparency and open data to a great extent, which makes accurate comparisons difficult.

AI is part of everyday life – but is rarely used for making the actual purchase

In a short period of time, AI has become a natural part of many consumers' everyday lives, and this is especially the case for younger people. More than 2 in 5 consumers use the new technology regularly, and among younger people this figure is more than 1 in 2. The threshold for everyday use is thus low and the behavior is largely already established among many consumers. However, the use of AI in the actual purchase situation is still limited. The gap between established consumer behaviors and the actual use of AI in e-commerce is clear.

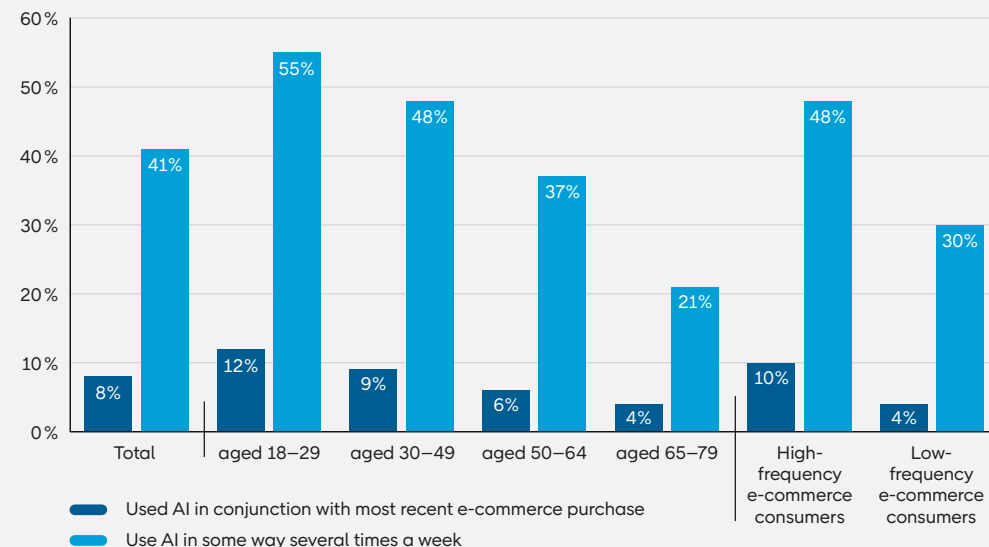
Usage quite simply does not accompany the consumer all the way through to the purchase: less than 1 in 10 used AI when making their latest e-commerce purchase. However, high-frequency e-commerce consumers use AI to a greater extent, suggesting that the behavior has taken hold somewhat.

In recent years, AI has grown at a rapid pace and is often described as being

one of the fastest adopted technologies in history. For example, ChatGPT reached 100 million users in just two months¹⁾ – faster than almost any previous digital services. This indicates that there is potential for the new technologies to also become an integral part of e-commerce. McKinsey estimates that agentic commerce could generate between USD 3 and USD 5 trillion globally by 2030 and that even a more cautious development could have clear effects on the European market.²⁾

However, it is difficult to predict exactly how the development will look like or at what pace it will happen. Depending on which market participants take the lead in agentic commerce, the development may take several different paths forward rather than following a specific direction, according to BCG.³⁾ Consumers are currently more open to using AI to find and compare products than to make the actual purchase, and different parts of the purchase journey are developing at different speeds.

Wide gap between everyday use of AI and use for e-commerce purchases



High-frequency e-commerce consumers
make online purchases several times a month

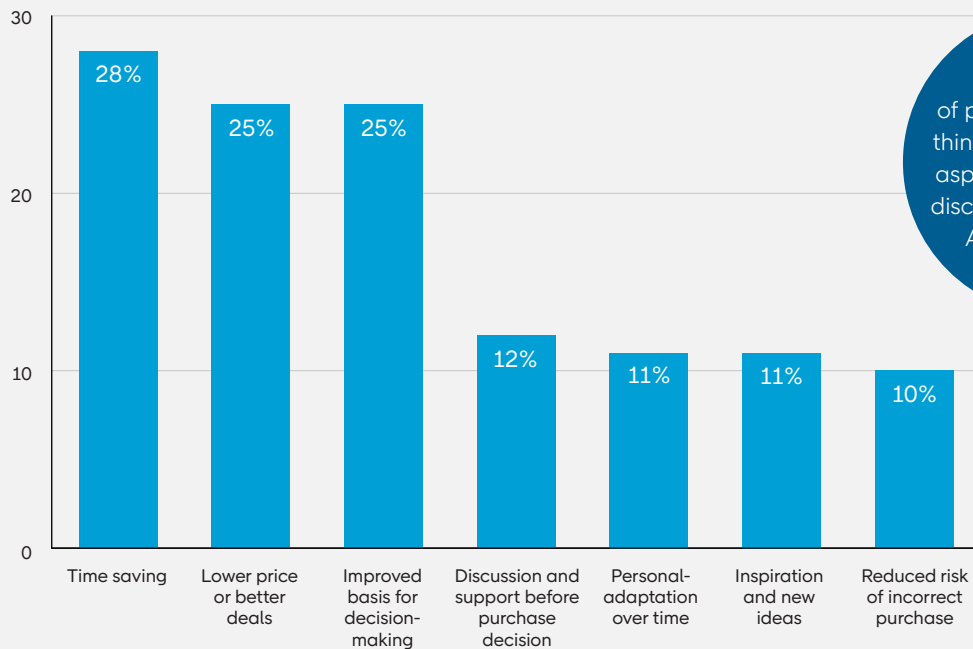
Low-frequency e-commerce consumers
make online purchases less than once a month



Agentic commerce involves digital AI assistants acting on behalf of the consumer through the entire buying process. This involves not just making the purchases, but also looking for information, comparing options and making recommendations. Consumers can set boundaries and preferences, and let technology manage all or part of the purchase journey.

Basis: Consumers who have shopped online

What do you find most valuable about an AI assistant?



SEO – Search Engine Optimization involves optimizing a website so that it appears higher in search results on Google and other search engines, thereby making it possible to increase relevant traffic and reach the right target audience

Basis: Consumers who have shopped online

*Basis: Consumers who have shopped online

Efficiency and safer decisions drive the value of AI

The wide range of products offered in e-commerce is a clear strength, but also means that consumers need to spend more time searching, comparing and choosing. According to consumers, this is also where a personal AI assistant adds the most value, as it helps them save time and make more well-informed decisions. Being able to find the right product quickly creates the most value, as stated by almost 1 in 3 consumers. The ability to simplify and speed up the search process is therefore particularly important.

Although consumers want to use AI to save time, they often use significantly more words when using AI assistants than when using traditional search engines, according to Christian Rudolf, CEO of SEO company Topdog. This means that it takes more time for consumers to get started, but the overall buying process is quicker.

Among younger consumers, it is clear that the value lies not only in the ability to improve efficiency and save time, but also in the role of the AI assistant in

terms of discussing the purchase and making decisions. For 20 percent of 18–29 year old consumers, the ability to discuss a purchase decision with AI before making it is the most valuable aspect, compared to a figure of 4 percent of consumers aged 65–79. This can be seen as part of a broader trend, where younger generations are increasingly using AI as a conversation partner in everyday life, to brainstorm ideas, get advice in different situations and in some cases also to get emotional support on a more personal level.¹⁾ The trend is thus towards new technology not only being used to make things more efficient, but also that it is increasingly influencing and shaping the way consumers think and make decisions, in a more relationship-based way.

By simplifying how consumers understand, compare and choose between options, AI reduces the complexity of the purchase. This makes it easier for consumers to find what they are looking for, but also puts new demands on e-retailers

¹⁾ Pew Research Center, February 2026

Algorithms create the selection, but consumers make the decision

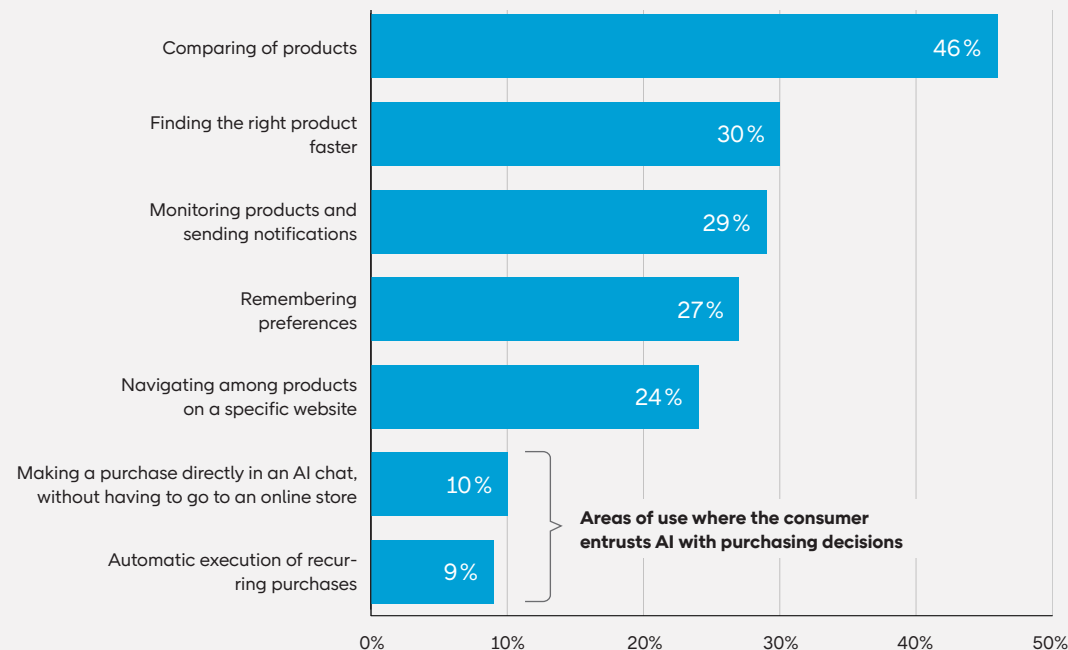
Consumers are clear about what they want from AI – comparison, time savings and better decision making support. Putting these needs into practice will mean that a larger part of the selection of products will move away from e-retailers' own channels, as more choices and comparisons are made directly in the AI services instead of on e-retailers' websites. Almost half of consumers are in favor of using AI for product comparisons, which can be partly explained by the fact that comparisons are already a key part of e-commerce.

As comparisons increasingly move from own e-commerce sites to AI services, the requirements for how products are described and made visible are increasing. According to Christian Rudolf, CEO of SEO company Topdog, the traditional keyword optimization still needs to be in place but it is also necessary to structure product information, minimize duplicate content and integrate user-generated content, such as reviews. AEO should be seen as a complement to traditional SEO, with a focus on boosting visibility in the AI search.

In the [E-barometer 2025 Annual Report](#), consumers' resistance to making the actual purchase with the help of AI is highlighted, which is also in line with ChatGPT's recent withdrawal from its instant checkout initiative.¹⁾ This indicates that consumers are not yet ready to fully hand over the purchase decision to AI. The signal is clear – consumers want the final word, at least for now.

Increasingly, AI is determining which options reach the consumer. This changes not only how products are discovered but also how e-commerce needs to make its products visible. At the same time, strong brands remain important with regard to consumer choices. Brands that attract consumers sufficiently strongly can still make the consumers go directly to a well-known online store or search for a specific brand rather than a particular type of product. This gives e-retailers the opportunity to leverage their strengths to attract customers, both with and without AI assistants.

Comparisons top the list when consumers rate the value of AI in e-commerce



AEO – Answer Engine Optimization involves adapting content so that it can be used directly to answer questions in search engines and AI services, with the aim of appearing as the best and most relevant answer.

The chart shows the percentage of consumers who are positive about each area of use regarding the deployment of AI assistants in e-commerce

Basis: Consumers who have shopped online

Top 5 sectors in which consumers are most positive about AI-generated images and videos

1. Furniture & home furnishings	25%
2. Clothing & footwear	20%
3. Home electronics	19%
4. Sports & leisure	19%
5. Building products	18%

60%

would like to have some kind of label/certification to ensure safe use of AI in e-commerce*

63%

think it is important that it is made clear when they are interacting with AI when shopping online*

29%

of companies are in favor of there being industry-wide AI certification in e-commerce**

Basis: Consumers who have shopped online

*Basis: Consumers who have shopped online

**Basis: All e-retailers

New visualization requires transparency and trust

AI is playing an increasingly important role in e-commerce, with AI-generated images being a clear area of use. By visualizing products in the right context, technology can reduce consumer uncertainty and facilitate purchasing decisions. At the same time, acceptance varies between product categories, so transparency and trust are important.

In product categories in which clear visualization is particularly important, such as fashion and furniture, consumers are more positive about AI-generated images. For example, brands like Zara use AI-based image tools in which consumers can see how a garment looks on them.¹⁾ The technology can also save time and resources for e-retailers by allowing the same product image to be used to create multiple color variants and model images; this functionality is offered by AI platforms such as Lumoo.²⁾

The positivity regarding AI-generated images is lower if the value of AI is less clear to consumers, for example in the pharmacy sector where the need for accurate information outweighs visual

elements. Acceptance is also low in the area of children's products and toys, where AI can be considered to be a sensitive issue that gives rise to questions about credibility and ethics.

The differences show that trust is an important element, with clear labeling and transparency having a significant role. 3 in 5 consumers would like to see some form of labeling or certification to ensure that AI is used safely. The need for transparency is also reflected in the EU AI Act, which requires AI-generated content to be identifiable as such. Although the regulation is not specifically targeted at e-commerce, it is particularly relevant in situations in which AI is used in the buying process.³⁾

AI has the potential to make it easier to both get inspiration and make decisions in e-commerce, but achieving widespread acceptance requires clarity regarding how and when the technology is used. Therefore, as AI takes on an ever bigger role in the purchase journey, it will be important to combine value-adding features with transparency and trust.

¹⁾Woman and Home, January 2026 ²⁾Ehandel.se, April 2026 ³⁾EU Artificial Intelligence Act

AI is rewriting the rules of omnichannel retail

AI is rapidly reshaping the rules of retail – from how customers discover products to how purchases are completed. In Google's latest Omnichannel Index,¹⁾ developed in collaboration with IMPACT Commerce, Tanja Winterberg, Head of Search+ in the Nordics, illustrates how much progress many brands still need to make to meet future requirements for a data-driven, seamless, and AI-enabled customer experience.

Retailers today face a brutal dilemma: while the foundations of e-commerce – technical performance and fast fulfillment – have reached maturity,



Tanja Winterberg

they are no longer enough to win. These have become "hygiene factors", the mere entry ticket to play the game. The biggest challenge for the industry is no longer just connecting online and offline channels; it is keeping up with rapidly shifting consumer expectations in an age where the bar is set by the best experience a customer has had anywhere, on any device.

To uncover how brands are navigating this shift, Google and IMPACT Commerce collaborated on the fifth edition of the Omnichannel Index. This 2026 report represents the most comprehensive evaluation of European retail to date, analyzing 373 brands across 11 industries and

6 markets. Using 27,602 data points collected via mystery shopping, desk research, and AI-assisted collection, the Index measures the ground truth of the consumer experience across 74 touchpoints. Specifically, this year's study introduced AI as a standalone discipline to benchmark how effectively brands are preparing for a future of agentic commerce.

The Index highlights a stark reality: the average performance score is just 38% out of 100%, and AI is the lowest-scoring discipline at a meager 19%. However, this gap creates a massive opportunity. By looking at how leaders like IKEA (who scored 80% in AI) are pulling away, the Index points to three critical strategic priorities for the next three years.



¹⁾ Omnichannel Index

“The brands that treat AI readiness as today's infrastructure will be the ones that own the customer relationship of tomorrow.”

1. Build for Agentic commerce: The End of the “Errand”

We are moving from AI as a tool to AI as an agent. Agentic commerce – where AI systems actively complete tasks like tracking price drops or executing purchases – is becoming the new standard.

The Machine-Readability Mandate: Only 42% of brands currently have product pages structured well enough for AI agents to reliably “read” them.

The Visibility Shift: If your content isn't structured for AI to interpret, your brand will simply vanish from the curated shortlists AI is creating for potential customers. Clean, machine-readable data is the new vital infrastructure.

2. Activate Data to Solve Choice Paralysis

Choice paralysis is a conversion killer: 63% of shoppers abandon purchases because finding and deciding became too much work. AI must be deployed as an intelligent curator to guide the journey.

Move Beyond the Transaction: Most retailers have optimized for the “buy” button (Purchase scores 53%) but neglected the Evaluation phase (34%) where customers are actually won.

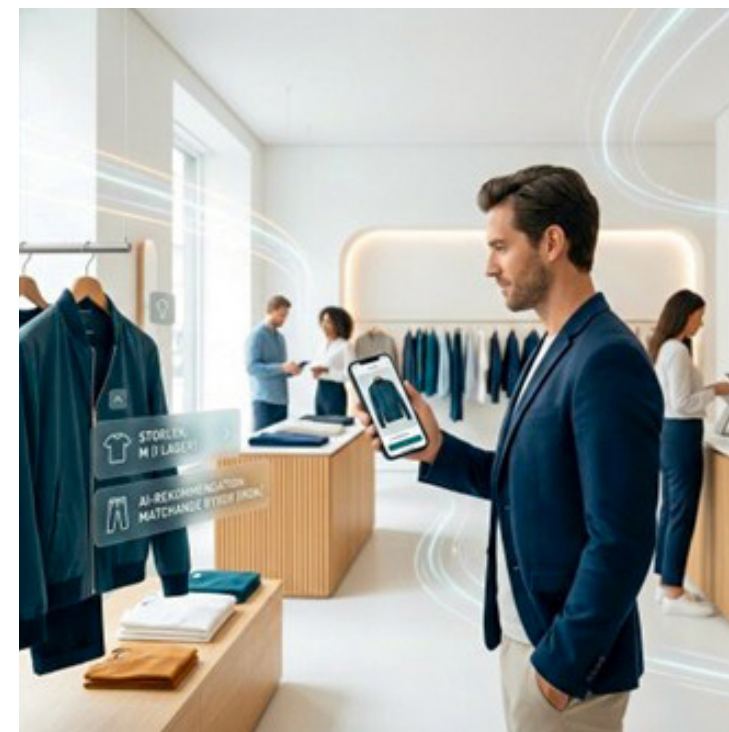
Personalization at Scale: While 77% of brands capture first-party data, only 27% actually activate it to drive personalization. Leaders use AI to tailor recommendations in real time, making the experience feel personal rather than generic.

3. Bridge the Sensory Gap: The Store is the Culmination

AI cannot replace the physical store, but it must complete it. Omnichannel shoppers spend an average of 73% more than single-channel shoppers, yet many journeys remain broken.

The Seamless Handoff: Retailers must treat their store network as a highly visible fulfillment asset. This means enabling “ship-from-store” and allowing staff to use data-driven insights to guide customers face-to-face.

Empower the Floor: Only 5% of evaluated brands offer Mobile POS, a massive missed opportunity to close sales anywhere on the shop floor.



“Only 5% of evaluated brands offer Mobile POS.”

The New Bottom Line

The distance between being average and being a leader has never been larger. The Omnichannel Index 2026 makes it clear: the brands that treat AI readiness as today's infrastructure

will be the ones that own the customer relationship of tomorrow. Are you ready to stop talking about AI and start using it to rewrite your rules of retail?

Second-hand sets the tone for circular e-commerce

From repair and rental to second hand, circularity is a common part of retailing and it is also becoming more common in e-commerce. One in two consumers has made use of some type of circular product offering online in the last three months.

The most common circular offerings utilized by consumers relate to buying and selling second-hand. The channels that are growing most in popularity in the area of second hand, in terms of both buying and selling, are resale services such as Vinted, Sellpy and Plick. Online retailers such as these are particularly popular among consumers aged 18–49, with more than one in four of them having shopped online for second-hand goods in the past three months. In addition, 20 percent of the youngest consumers have sold a product through a resale service like these in the last three months, compared to 3 percent of the oldest consumers.

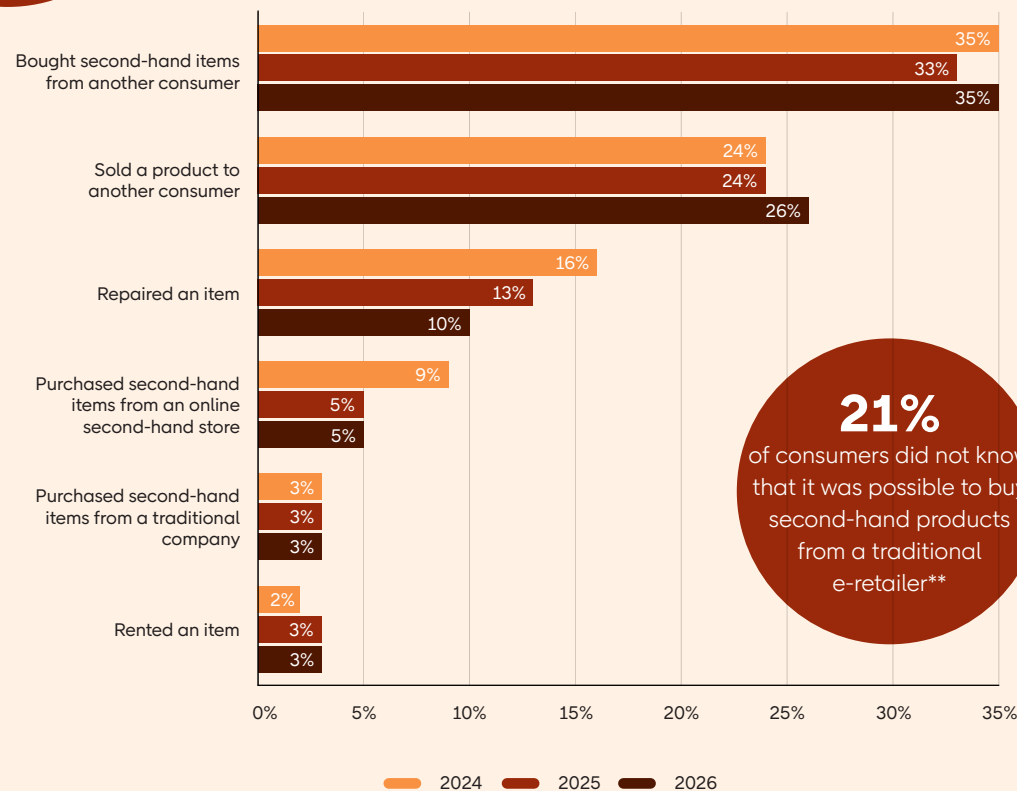
Second-hand has also spread to traditional businesses, with Ikea, Bubbleroom and Lindex, among others, offering

second-hand products via their e-commerce platforms. At the same time, new ways of working are being developed. For example, Kappahl is testing AI-based solutions to select, value and combine second-hand garments with new items in its collections, as a step toward achieving more circular business models.¹⁾ Despite this, only 3 percent of consumers have shopped online for second-hand goods from a traditional company. One reason for this is that 2 in 10 consumers were not aware this possibility existed. This suggests that a lack of visibility and communication is a major barrier for consumers, but also that the range of products offered by e-retailers is often limited.

Circular offerings are part of consumers' everyday lives. For e-retailers, the challenge ahead is still to find practical ways to integrate circular offerings into their regular offerings in a profitable way. How this will develop in the future remains to be seen, but one thing is clear: circularity, not least second hand, is no longer just an option but is a natural part of e-commerce for many consumers.

50%
of consumers have used circular e-commerce services in the last quarter (49%)*

Consumers' use of circular product offerings online



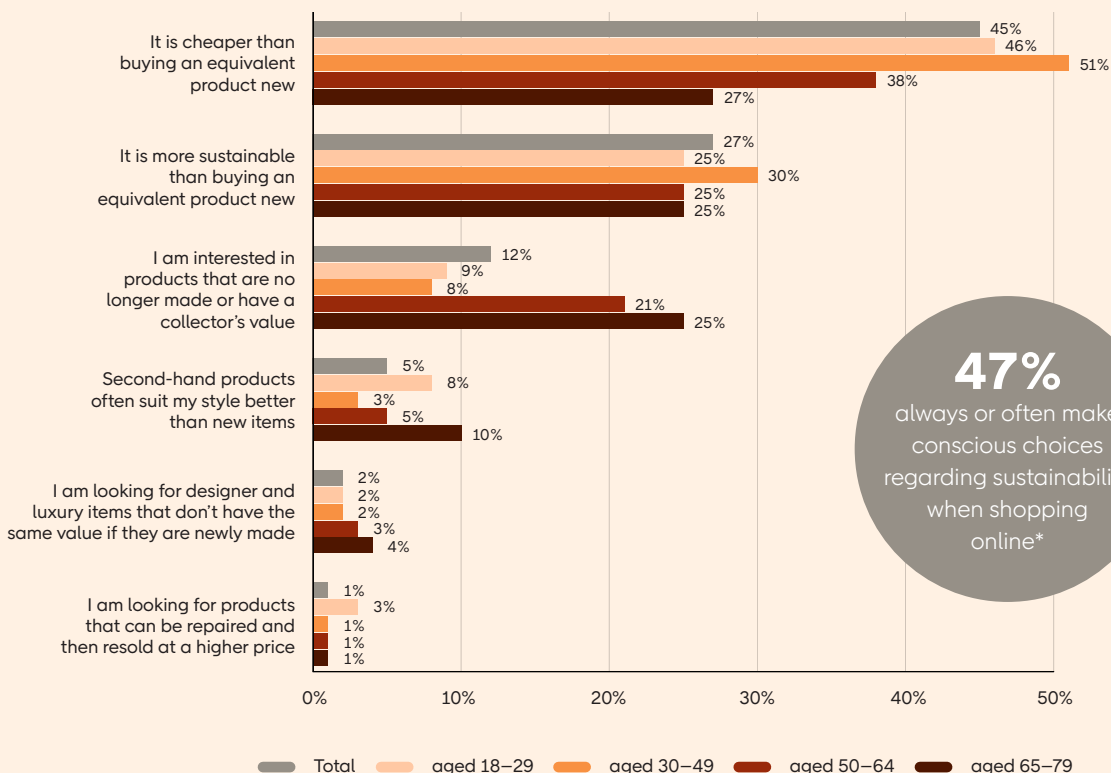
21%
of consumers did not know that it was possible to buy second-hand products from a traditional e-retailer**

Basis: Consumers who have shopped online

*Consumer, has shopped online

**Consumer, has not made second-hand purchases online from a traditional company

Main reasons for buying second-hand goods instead of new goods



Basis: Consumer, has made second-hand purchases online

*Basis: Consumers who have shopped online

Affordability is the main reason behind second-hand purchases

Consumers make second-hand purchases online for several reasons, ranging from wanting to find unique products to having the opportunity to make more affordable purchases. Price is the main reason for consumers choosing to make second-hand purchases rather than buying the same product new, with 45 percent of consumers saying this, compared to 43 percent last year. The lower prices make second-hand an interesting channel for e-retailers that want to reach more consumers, not least those with lower purchasing power. However, it is important for e-retailers to balance the importance for their brand of exclusivity and having a niche target group before making such a move.

For consumers, circular offerings are closely linked to sustainability. Almost half of consumers state that they always or often take sustainability into account in their purchasing decisions, and according to the Swedish Trade Federation's sustainability survey, a quarter of consumers associate sustainable consumption with making second-hand purchases rather than consuming less.¹⁾

Regarding second-hand purchases online, more than 1 in 4 consumers state that sustainability is one of the main reasons for choosing second-hand instead of buying new products.

Finding products that are no longer manufactured or that have collector's value are other common reasons for second-hand shopping, especially among older consumers. 20 percent of those aged over 50 state this as a reason, compared to less than 10 percent of younger people. Collectibles were also the category in which the highest number of products were sold on the online platform Tradera in 2025, with Pokémon, cassette tapes and CDs also near the top.²⁾ Second hand is thus not only driven by price and sustainability, but also by being able to find unique products.

The second-hand offering needs to be adapted to the target group and buying behavior. Price attracts most people to second hand, but availability and the products themselves influence who actually ends up choosing to make purchases.

¹⁾ Swedish Trade Federation sustainability survey 2025/2026, April 2026 ²⁾ Tradera, January 2026

Smoother processes contribute to an increase in second-hand purchases

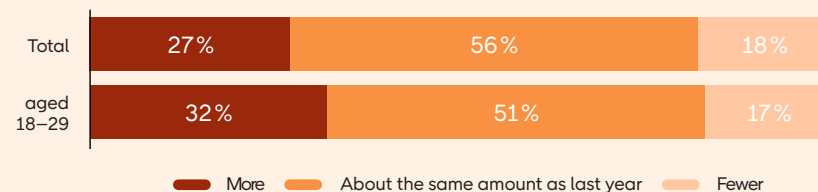
More than 8 in 10 consumers who shopped online for second-hand goods during the year bought more or about the same amount of second-hand goods compared to the previous year. The most common reason for consumers increasing their purchases of second-hand purchases is that they feel they are saving money. This underlines the importance of price, not only as the main reason for buying second-hand products, but also as the driving force behind actually buying more.

As more participants enter the second-hand market, competition is increasing and development is being boosted. Consumers mention various forms of simplicity and ease of use as reasons for buying more second-hand goods. A wider and better choice, more accurate search results and improved delivery and payment options are some examples. Market participants such as Zalando have invested in developing their second-hand offering. Consumers can now buy both new and second-hand clothes in the same shopping cart. Last year, such mixed carts accounted for

40 percent of Zalando's orders.¹⁾ Newer second-hand market participants are also developing their offerings. For example, Vinted is investing in an own system for both shipping (Vinted Go) and payments (Vinted Pay) to push down prices and make its processes more efficient, which can help make second-hand shopping more attractive. The system is currently available in five European countries, although not yet in Sweden.²⁾ If the initiative is successful, it may be something that Swedish consumers can also benefit from in the future.

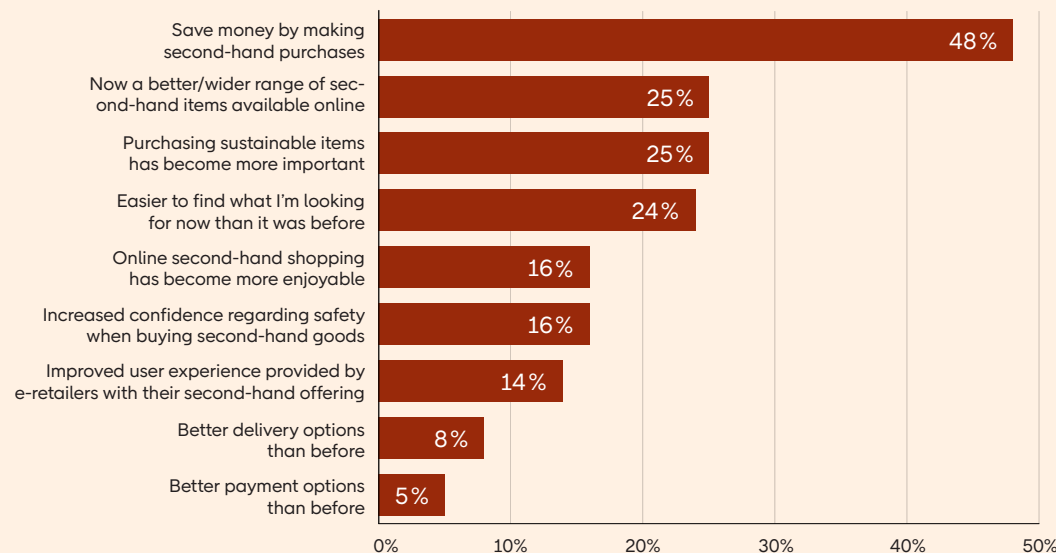
Price is a key factor for consumers in the second-hand market, but as the price is already low compared to traditional e-commerce, and it is often the case that the price is set by the consumer, achieving even lower prices is challenging. However, there are other ways forward. Working on increasing simplicity and enhancing the user experience are clear keys to growing second-hand retail volumes. This can be an advantage for many traditional e-retailers, as they often already have such aspects in place.

Have you bought more or fewer second-hand goods online in the past year, compared to the previous year?



Basis: Consumer, has purchased second-hand items online in the last year

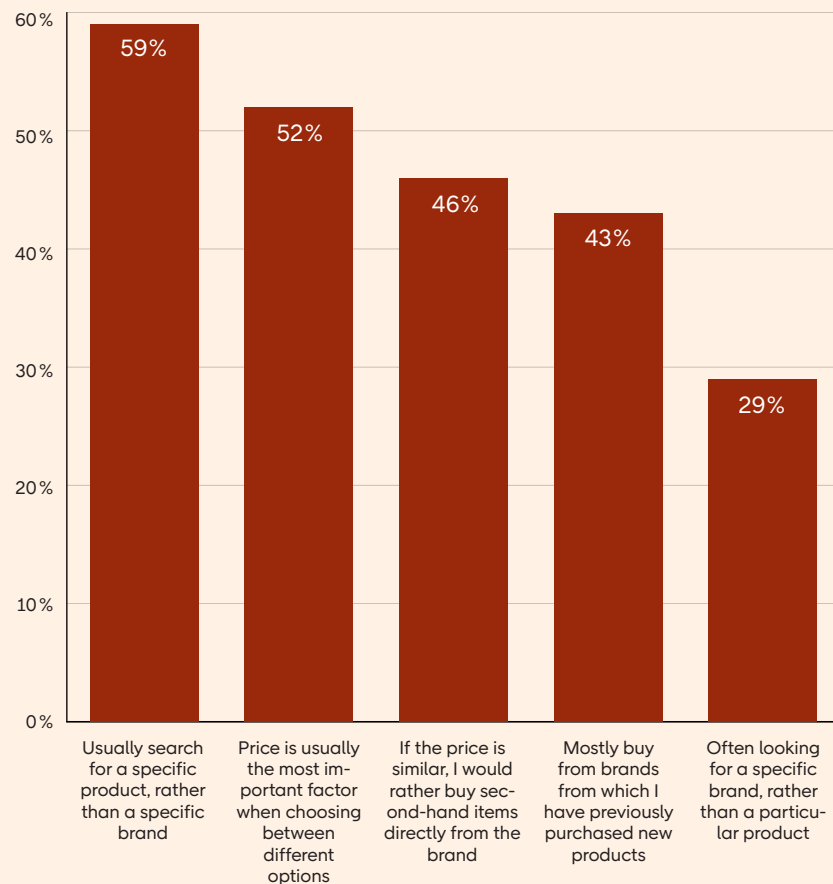
Consumer reasons for purchasing more items second-hand



Basis: Consumer, has purchased more second-hand items online in the last year

¹⁾ Dagens industri, January 2026 ²⁾ Ehandel, April 2026

Percentage of respondents who agree with the following statements regarding second-hand shopping online



Basis: Consumer, has made second-hand purchases online

Loyalty is important in the circular market as well

As is the case with traditional e-commerce, consumers are coming from different starting points when making second-hand purchases online. Some are looking for inspiration, while others are looking for a specific product or brand.

One clear insight is that the focus is often on the product in the first stage. Almost 6 in 10 consumers search for a specific type of product when doing second-hand online shopping, rather than looking for a specific brand.

The results show that the brand has a bigger role in the second-hand market than this might initially suggest. Despite the fact that few consumers buy second-hand goods from traditional e-retailers, almost 3 in 10 consumers actively look for specific brands, rather than a particular type of product, when buying second-hand goods online. Tradera also highlights the importance of brands and annually releases a list of the most sought-after brands on the second-hand

market, with Fjällräven and Polarn O. Pyret being at the top.¹⁾

In addition, almost one in two consumers say they would prefer to buy second-hand directly from the brand, provided the price is the same. Consumers thus show a desire to be more loyal to brands when they make second-hand purchases. 43 percent also often buy second-hand goods from brands from which they have also previously purchased new products. When the consumer already knows the brand well, expectations regarding fit, quality and style are clearer, thereby reducing uncertainty.

For e-retailers, it will be important to find out what role they themselves want to play in a market that continues to change rapidly. This does not mean just positioning and taking control of the brand across multiple channels, but also involves understanding how strong the brand is and how desirable it is in the second-hand market.

¹⁾ Tradera, May 2025

Buying and selling is popular, but not always without problems

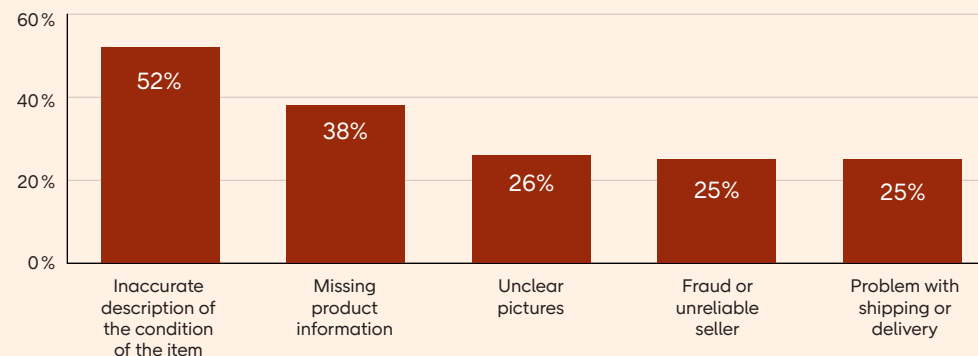
As the online second-hand market grows, the associated challenges are also becoming more apparent. 19 percent of consumers who made second hand purchases online in the past three months experienced problems while shopping, as did 14 percent of sellers.

Many of the problems are common to both buyers and sellers. Unreliable counterparties and attempted fraud are among the most common challenges. Several second-hand platforms are actively working to reduce risks and make the process simpler, for example by using the BankID digital signature. It is not surprising that services that enhance security and make the process smoother are rapidly gaining in popularity. Logistics is another recurring problem. 25 percent of buyers and 23 percent of sellers have had problems relating to shipping or delivery. The problems are not always linked to the logistics operators. For example, if sellers send several items at the same time, there is a risk that an item is sent to the wrong person, which can create problems for both buyers and sellers.

The most common problem with online second-hand purchases is there being an inaccurate description of the condition of the item, followed by missing product information and unclear pictures. Presenting goods fairly is a challenge for both consumers and professional market participants, not least for e-retailers who want to scale up their second-hand business. E-retailers play an important role here, as consumers often have more trust in them and it is easier for them to handle complaints and requests for refunds. The problems may be due to different expectations, a lack of information or actual errors. This points to a need for clearer standards and more consistent communication to reduce uncertainty regarding purchases. This is something that Refurbed, for example, is working on.

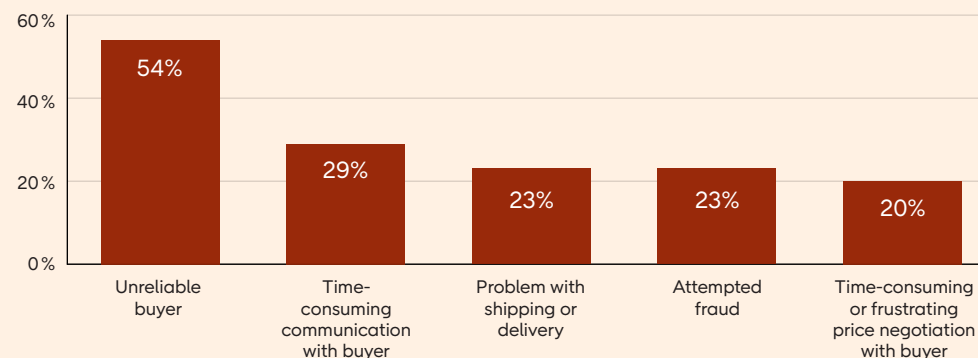
As second-hand retailing grows, so do consumer expectations. Many people want it to be as easy to buy second-hand goods as it is to buy new goods; this means higher demands on clarity relating to communication, deliveries and responsibility going forward.

Which of the following problems have you experienced when making second-hand purchases online?



Basis: Consumer, has experienced problems when buying second-hand items online

Which of the following problems have you experienced when selling second-hand items online?



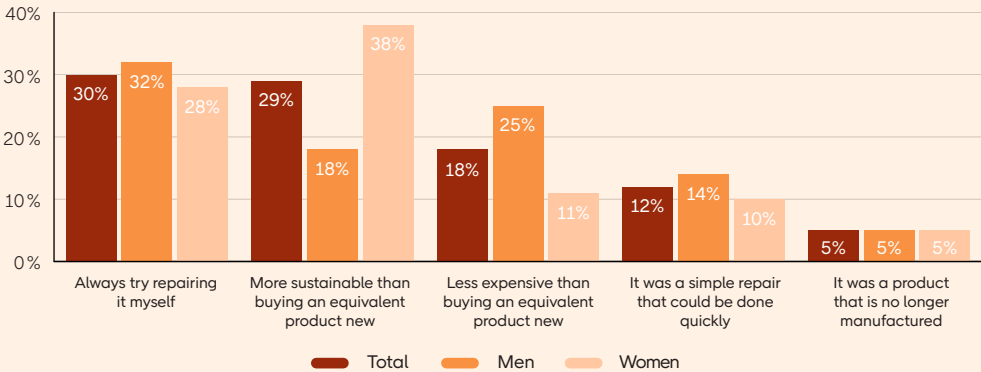
Basis: Consumer, has experienced problems when selling second-hand items online

The most common types of goods that are repaired or rented online

	Repair	Rent
1	Clothing and footwear 13% (14%)	Sports and leisure products 30% (26%)
2	Home electronics 11% (11%)	Vehicles and vehicle accessories 28% (23%)
3	Vehicles and vehicle accessories 5% (3%)	Books, comic books, etc. 4% (2%)

Basis: Consumer, has repaired an item online, or rented via an e-commerce service

The main reasons for repairing a product rather than buying a new one



Basis: Consumer, has repaired an item through an online service

Multiple pathways to circularity, with room to grow

Circular e-commerce consists of more than just second-hand goods. Renting and repairing are also important elements, but are less widely utilized. One explanation for this is that these services are perceived to be more convenient in physical stores, where consumers can hand in their goods directly and avoid, for example, transportation time. However, for e-retailers, there are several challenges associated with offering repairs and rentals online, not least the investment required to always have a two-way supply chain.

1 in 10 consumers have had an item repaired in the past three months, which is a slight decrease from 2025. Repairs usually relate to clothing and footwear, followed by home electronics. However, there is potential in several sectors, not least the capital-intensive ones where the barrier to buying new items is higher. However, the drivers for repairing differ: almost 4 in 10 women state sustainability as being the main reason, while the corresponding share among men is 2 in 10. For men, price is a stronger driver. The same behavior may result from different motives, which is important to take into account when designing the offering.

¹ Le Closet, 2026

Renting items is still unusual, with only 3 percent having rented something in the last three months, mainly in the product groups sports and leisure and vehicles, which are both capital-intensive sectors. At the same time, there is a slight increase in the renting of clothing and footwear, increasing from 1 to 3 percent in 2026. Rental for large events such as weddings and proms has been common for a long time, but now the concept is starting to establish itself in aspects of everyday life as well. This interest is partly driven by social media and by new business models, where market participants such as Le Closet, for example, offer a subscription via which consumers can rent a selection of garments on a monthly basis.¹ Although this behavior is still relatively limited, there may be further potential in the trend-driven fashion industry.

Online repair and rental are thus still relatively unusual – both because of what is on offer and because consumer behavior has not yet really shifted. But increased efforts by market participants can help lower the barriers and eventually encourage more people to make different choices.

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