E-barometern

PostNord in association with HUI Research

2025

ANNUAL REPORT

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

The E-barometern Annual Report 2025 is based on information collected from retail companies in January 2026. A total of 101 companies that sell items online participated in the survey. The consumer results are based on 12 monthly surveys with just over 1 200 respondents in each (total of 15 000 respondents).

PostNord also conducted thematic surveys every quarter, with the most recent quarterly survey taking place in December 2025. This consisted of two questionnaires with approximately 3 000 and 2 000 respondents, respectively. All the consumer surveys were conducted using KANTAR's web panel. All surveys are conducted with a representative national sample of the Swedish population aged 18–79. The online surveys are representative of the 98 percent of Sweden's population that has internet access. Contact PostNord for detailed information about each survey.

Foreword

After several years of economic uncertainty and inflation, Swedish households have regained their purchasing power, which has had an immediate impact on online shopping. The fact that e-commerce has attained a new record level is a sign of strength. This shows that, despite continued uncertainty in the world, consumers have prioritized digital commerce as soon as their household budgets have allowed. During the year, e-commerce grew by 10 percent, with net sales of over SEK 153 billion, meaning that e-commerce has now surpassed the record levels of the 2021 pandemic year. At the same time, e-commerce continued to take market share from physical stores, confirming that digital commerce has become an integral part of consumers' daily lives.

In the E-barometern Top 20, in which Swedish consumers vote for their favorite websites, clear trends are emerging. Apotea, Amazon and Zalando make up the top three, all offering a large and varied range that attracts consumers. Three pharmacies are among the favorites, reflecting the digital maturity of the sector, and three second-hand market participants are showing that circular consumption patterns have become a natural part of Swedish e-commerce.

This year's themed section takes a deep dive into the things that impacted Swedish e-commerce in 2025, supplemented by comments from seven representatives of the industry who provide their perspectives on the factors that have had the greatest impact on e-commerce development during the year:

- The importance of omnichannel is increasing, with consumers switching between physical stores and digital channels depending on their needs, and with pop-up shops providing new opportunities.
- Increasing internationalization is clearly reflected in purchasing behavior, with more people choosing to make purchases from foreign websites so they can access a wider range of products.
- The digital shopping cart has become a strategic point of reference in the purchase journey. A place where consumers can evaluate, compare and combine items, while simultaneously being influenced by AI agents able to research and alter the shopping cart process.

Looking ahead to 2026, the same industry representatives share their perspectives on trends and challenges. AI has made a breakthrough and is rapidly changing the game for e-commerce; half of consumers find AI most useful in the research phase, while more than half do not want to let AI manage the entire purchase journey. Social commerce is growing internationally, although more than eight of ten Swedish consumers have not yet made a direct purchase via social media, proving that this is still an area offering potential for Swedish e-retailers.

We hope that the report provides inspiration, guidance and a clear picture of the current situation and the future of Swedish e-commerce.

Enjoy the read!

Ylva Staszewski
Head of the Parcels business area,
PostNord Sweden

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Hope for the future as the economy improves

2025 was an eventful year. The economic recovery gained momentum, but geopolitical events contributed to consumer uncertainty persisting longer than expected. Trump's announcements regarding and imposition of trade tariffs, combined with the wars continuing to rage in Ukraine and Gaza, have slowed global economic growth.

After the summer, however, the conditions for economic recovery improved. Lower inflation, lower interest rates and higher real salaries have given consumers more money to spend, making them more willing to buy.[1] This has been particularly evident online, where retail sectors have continued to recover over the past year. At the same time, consumers have been making more purchases from abroad and bought more second-hand items.[2]

The situation is expected to continue to improve in 2026, with consumers' positive attitude towards their finances expected to result in a shift in focus from saving to consumption. At the same time, consumer purchasing power is being bolstered by the Swedish Government's expansionary fall budget, which includes halving VAT on food. This is predicted to lead to a broader increase in consumption, benefiting retailers both online and in physical stores.[1]

The extent to which consumers will make online purchases in 2026 remains to be seen. The year started with geopolitical events such as the arrest of the Venezuelan president by the United States and repeated statements about taking control of Greenland. Greater uncertainty may make consumers continue to hold on tight to their purse strings, even though the economy finally seems to be improving.

[1] Retail Outlook report, December 2025 [2] Parcel Index Q4 2025

Record year for e-commerce

2025 was a record year for e-commerce, with growth of ten percent compared to the previous year. Online sales amounted to SEK 153 billion, exceeding the previous record set in 2021.

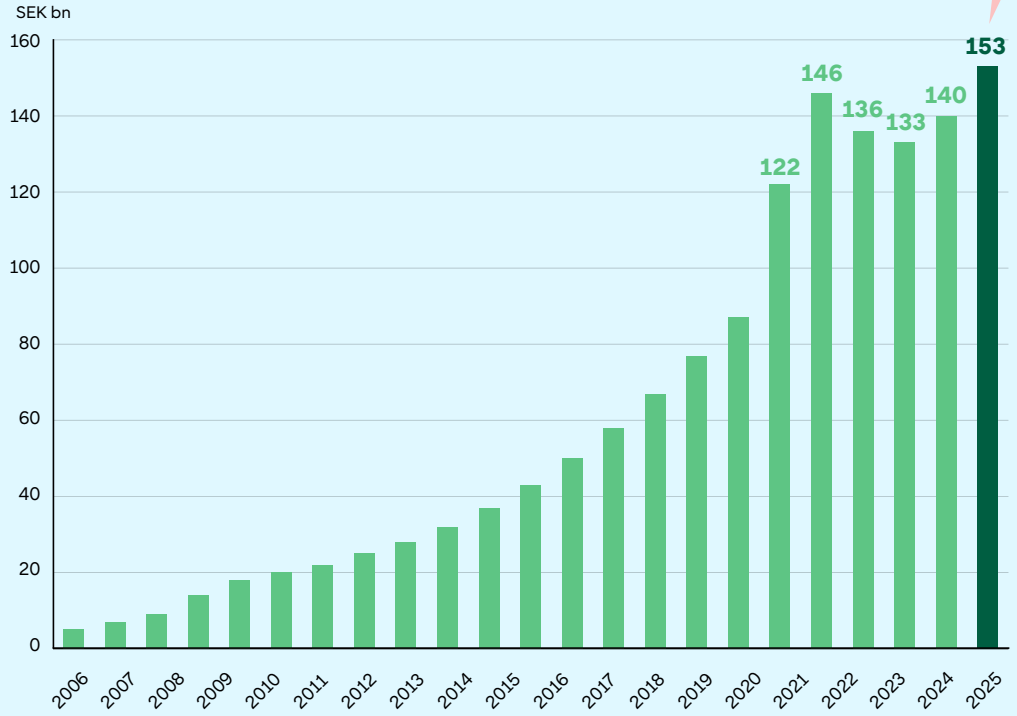
After several years of recession, 2025 was a year of recovery. Household purchasing power was boosted, the economy stabilized and consumption increased, benefiting the retail sector as a whole[1] and leading to record online sales. Moreover, e-commerce continued to take market share from physical stores, growing in 2025 at a faster rate than retail as a whole.

Over the past year, e-commerce has not only grown, but also changed. One example is social commerce, with social media playing an increasing role in the e-commerce market. At the same time, the use and importance of AI in e-commerce is growing. In 2025, consumers in the US could shop directly via AI agents for the first time.[2] Although this capability is not yet available in Sweden, Swedish consumers can already use AI to explore ranges, compare different options and find products that suit their needs.[3]

Overall, developments in 2025 show that e-commerce is a natural and integral part of both retail and the daily lives of many consumers. Physical stores and e-commerce meet different needs, at least to some extent. Digital channels are increasingly responsible for availability and convenience, while physical stores continue to play an important role in the customer experience and relationships with customers. As AI develops and becomes more widespread, the rules of the online game are changing, and it is important for e-retailers who want to continue to be part of the e-commerce success story to respond to these developments.

[1] Retail Outlook report, December 2025 [2] OpenAI, November 2025 [3] OpenAI, September 2025

E-commerce net sales



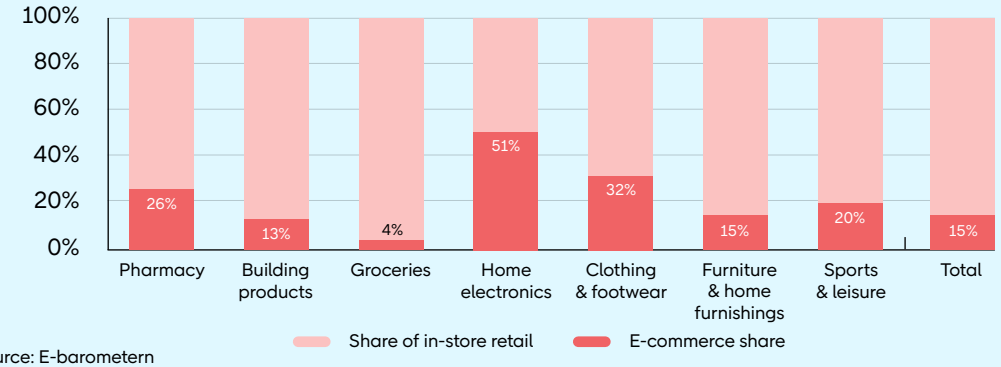
Source: E-barometern

Sales growth and net sales per sub-sector

	Growth rate 2025	Net sales 2025 (SEK bn)	E-commerce share 2025	E-commerce share 2024
Pharmacy	18%	17.4	26%	23%
Building products	5%	6.4	13%	12%
Books & media	-3%	5.2	N/A	N/A
Groceries	7%	18.2	4%	4%
Home electronics	11%	30.2	51%	49%
Clothing & footwear	7%	21.0	32%	30%
Furniture & home furnishings	18%	9.3	15%	13%
Sports & leisure	5%	5.5	20%	19%
Total	**10%**	**153.0**	**15%**	**14%**

Source: E-barometern

E-commerce shares per sub-sector



Source: E-barometern

E-commerce continues to gain share in the retail sector

E-commerce saw much-needed growth in 2025. The year started on a positive note and growth continued throughout the year. At the close of 2025, all but one of the sectors ended up in the black, with positive full-year growth.

After several years of clearly dominating the top spot in terms of growth, pharmacies have now been joined by furniture and home furnishings, with both sectors achieving full-year growth of 18 percent. At the other end of the scale are books and media, which had the weakest performance, with a decline of three percent. The remaining e-commerce sectors grew by at least five percent, which is another sign of strength from e-commerce, as only three of the sectors attained a minimum of five percent growth in last year's annual report. This demonstrates a broad-based recovery, with the majority of sub-sectors clearly on the rise, reinforcing the role of e-commerce in the Swedish retail sector.

Online sales not only showed positive growth in 2025, they also grew at a faster rate than retail as a whole. The overall e-commerce share increased during the year and now stands at 15 percent. The e-commerce share has also grown within the sub-sectors with the exception of groceries, which remains stable at four percent. Online pharmacy is the sector that most clearly strengthened its position over the year, accounting for the biggest increase in e-commerce share, namely three percentage points.

After a year of growth and recovery, e-commerce is embarking on 2026 in a stronger position and with favorable prospects for further growth.

Another strong year for online pharmacies

E-commerce sales of pharmacies continued to grow sharply in 2025. During the year, growth amounted to 18 percent, and e-commerce continues to account for a significant share of the sector's volume growth.[1]

At the same time, more online players have gone public, signaling a continued belief in the sector's digital growth. Despite this, the online pharmacy Apotea experienced volatility in the stock market in 2025, falling sharply at the start of the new year. This was partly due to investments in a new warehouse and weaker-than-expected sales during Black Friday Week and the Christmas shopping period.[2] In the fall of 2025, Meds followed in Apotea's footsteps and went public. During the year, the company surpassed one billion Swedish kronor in sales, although margins declined slightly in the final quarter of the year compared to the previous year.[3]

Over the year, the sector has taken several steps towards offering more rapid and convenient deliveries. One obvious example is the collaboration between Wolt and Doz Apotek, highlighted in E-barometern for Q3 2025; another is Apotea's new warehouse. At the same time, online pharmacies are facing new challenges when it comes to efficient deliveries. As of fall 2025, new rules apply that require medicine deliveries not to be left unprotected, for example outside the front door.[4] For market participants such as Apotea and Apohem, this has entailed practical challenges and increased costs when interpreting the regulations and redirecting consumer orders to parcel lockers or service points. The customer experience and the availability of medicine deliveries outside major towns and cities may also be affected by the new rules.[5]

Sales of cosmetics and beauty products are significant for online pharmacies, and social media such as TikTok often drive demand. In 2025, interest in health also led to an explosion in the prescription of weight management drugs.[6] This is also having an impact on other sectors, such as the grocery sector, as the widespread use of drugs such as Ozempic is affecting the demand for certain foods.[7]

As a whole, the sector is entering the new year of e-commerce with the wind in its sails, but it remains to be seen how e-retailers and the sector will take advantage of this.

[1] Swedish Dental and Pharmaceutical Benefits Agency [2] Placera, January 2026 [3] Di Digital, February 2026 [4] Swedish Medical Products Agency, November 2025
[5] Läkemedelsvärlden, September 2025 [6] ICA Gruppen, January 2026 [7] Realtid, September 2025

18%
e-commerce growth 2025

10% e-commerce growth 2022

17% e-commerce growth 2023

20% e-commerce growth 2024

Sales in the outpatient market, e-commerce, 2025

Source: Swedish Pharmacy Association/SA Service AB

3 TRENDING GOOGLE SEARCHES*

1. Tirzepatide (∞)
2. Tylenol (∞)
3. Lergigan (∞)

*2025 full year compared to 2024 full year

↑ **17.4** billion SEK in net sales 2025

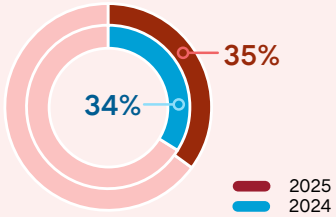
26% ↑ share of total sector

SEK 477

SEK +9 since last year

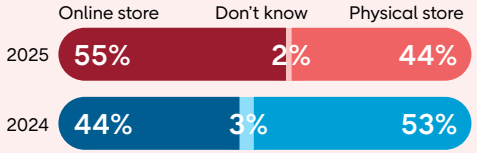
Average amount spent online over last 30 days

Basis: Consumer, has shopped online. Average January – December



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

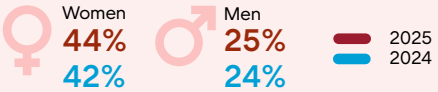
Basis: Consumer, has shopped online. Average January – December



Percentage who made their most recent purchase in the category in an online store and in a physical store, respectively

Basis: Consumers who have shopped online

Percentage of women and men who have shopped online in the category



Basis: Consumer, has shopped online. Average January – December

Building products sector stepping up the pace

The building products sector online made a significant recovery in 2025, with a five-percent increase. Thanks to an improvement in the economy and the temporary increase in the ROT (Repairs, Conversion, Extension) deduction, consumer interest in renovation was revived, driving demand in the sector.

According to Byggmaterialhandlarna (Association of Swedish Building Materials Merchants), growth in the second half of the year was driven by B2B sales, which are often influenced by household renovation projects.[1] Although B2B sales are not included in the figures measured in E-barometern, this development can still provide an indication of the consumer market. Household building projects often increase demand for building materials purchased by consumers themselves, both in store and online. However, the fact that as of January 1, 2026, the ROT deduction has returned to its normal level risks putting a dampener on demand for building-related products.

The improvement in the economy was clearly felt in the building sector, which recorded one of its largest declines in redundancies in the fourth quarter.[2] In 2025, bankruptcies in the sector also fell from a record high.[3]

Another piece of good news for the sector is that changes to the Swedish Planning and Building Act now make it possible to carry out certain smaller projects without a building permit. The new rules were introduced in December 2025 and may generate greater interest among consumers in undertaking minor renovation projects.[4]

Households will receive additional stimulus in 2026 when a lower amortization requirement and a higher mortgage cap enter into force. This may encourage more consumers to take the plunge and invest in a new home, creating a ripple effect for the building sector online.[5] More people moving and renovating also affects demand in other home-related sectors, such as furniture and home furnishings.

So, the new year will bring both challenges and new opportunities. As the economy continues to improve, 2026 could be the year when the sector truly leaves the crisis behind.

[1] Building Materials Index Q3 2025 [2] Finanstidning.se, December 2025 [3] Branschaktuellt, January 2026 [4] City of Stockholm, December 2025 [5] Beijer Byggmaterial Q4 2025

-3% e-commerce growth 2022

-19% e-commerce growth 2023

-6% e-commerce growth 2024

5% e-commerce growth 2025

3 TRENDING GOOGLE SEARCHES*

1. Sealant & mortar (1 750%)
2. Yale Doorman Classic (750%)
3. Granite (550%)

*2025 full year compared to 2024 full year

↑ **6.4** billion SEK in net sales 2025

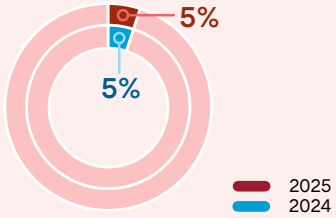
13% ↑ share of total sector

SEK 1 910

SEK +131 since last year

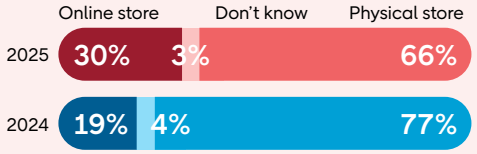
Average amount spent online over last 30 days

Basis: Consumer, has shopped online. Average January – December



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

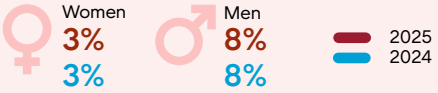
Basis: Consumer, has shopped online, average January – December



Percentage who made their most recent purchase in the category in an online store and in a physical store, respectively

Basis: Consumers who have shopped online

Percentage of women and men who have shopped online in the category



Basis: Consumer, has shopped online. Average January – December

Screens pose a challenge but also present opportunities

The books and media sector performed poorly in 2025 and was the only sector to show negative growth figures for the full year. At the same time, reading has picked up during the year, which was reflected in increased sales of printed books in the first three quarters,[1] driving the sector in a positive direction. This is a change from last year, when more creative items such as craft supplies drove the sector, while printed books declined online.[1]

The battle for consumers' time continues to take center stage. In an increasingly screen-centric world, the sector faces challenges and opportunities, with digital habits both competing with and generating an interest in reading.

Booktok is a clear example of how digital habits can do the latter, something that is highlighted on several occasions in E-barometern. In 2025, the trend was further boosted by the Booktoker of the Year award, instituted by online bookstore Bokus, in collaboration with Bookmark, Lovereads and TikTok. The award recognizes TikTok profiles that spread the joy of reading and inspire others to read [2] and can further fuel interest in reading.

Although not fully reflected in the sector's online sales, the desire to engage in creative and relaxing activities outside of screens is growing. What is known as the kidult trend, where adults engage in activities traditionally associated with children, is becoming increasingly evident. Interest in construction kits, coloring books and collectibles is growing, and according to online bookstore Adlibris, many consumers are seeking activities that combine creativity and relaxation and allow for both playfulness and a break from everyday life.[3]

Despite a weak 2025 for the books and media sector, several trends indicate a 2026 in which reading and creativity will play a greater role in life, offering good potential for the sector.

[1] Swedish Publishers' Association and Swedish Booksellers' Association, October 2024 [2] TikTok, January 2025 [3] Adlibris, november 2025

-3%
e-commerce growth 2025

-10% e-commerce growth 2022

-5% e-commerce growth 2023

2% e-commerce growth 2024

3 TRENDING GOOGLE SEARCHES*

1. The Glass Dome (Glaskupan) (∞)
2. 2026 diary (3 750%)
3. To Cook a Bear (Koka Björn) (2 650%)

*2025 full year compared to 2024 full year

↓ 5.2
billion SEK in net sales 2025

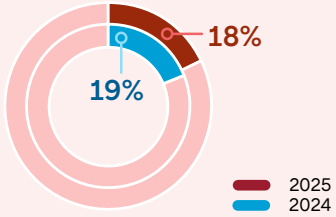
N/A
share of total sector

SEK 555

SEK -27 since last year

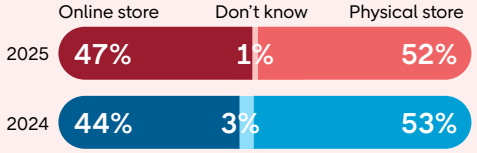
Average amount spent online over last 30 days

Basis: Consumer, has shopped online, average January – December



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

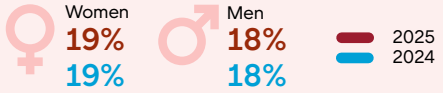
Basis: Consumer, has shopped online, average January – December



Percentage who made their most recent purchase in the category in an online store and in a physical store, respectively

Basis: Consumers who have shopped online

Percentage of women and men who have shopped online in the category



Basis: Consumer, has shopped online. Average January – December

A taste for online food

E-commerce in the grocery sector grew by seven percent in the 2025 full year.[1] After several years of sharp price increases and severe pressure on consumer finances, inflation started to slow down, leading to a slow recovery in both willingness to buy and volumes.[2]

The increase in demand was particularly evident in the fourth quarter, when consumers increasingly opted to buy groceries from pure e-commerce market participants.[3] During Christmas, one of the sector's most important sales periods, the pressure on the online channel is particularly high. Many consumers choose to shop for food online for the first time, with many shopping in large volumes, increasing demands on e-retailers in terms of planning and flexibility.[4]

In 2025, consumers often purchased food online at the end of the working day and prior to the weekend, with Fridays being the busiest day for orders. Consumers value their time highly, and e-commerce is being used to reduce the time spent on food shopping so they can spend it on other things.[5]

This is part of a broader shift in consumer behavior visible throughout Europe. Gen Z in particular has high expectations for seamless and personalized shopping experiences, as well as healthy food, which sets high standards in terms of content and experience. Where e-retailers are concerned, this means a greater need to use technologies such as AI to provide more relevant offers and recommendations. This can include investments in personalized recipe suggestions, loyalty programs and customized campaigns to retain and grow their customer base.[6]

The outlook for spring 2026 has been further boosted by the VAT on food being reduced from 12 percent to six percent. Lower food prices are expected to increase consumers' ability to consume and lay better foundations for more consumers to choose the convenience of e-commerce over the coming year.

[1] Swedish Food Retail Index, Svensk Dagligvaruhandel [2] Retail Outlook report, December 2025 [3] YouGov newsletter, November 2025
[4] Dagligvarunytt, December 2025 [5] Wolt's year in figures: how Swedes ate and shopped in 2025 [6] McKinsey, The State of Grocery Retail 2025

7%
e-commerce growth 2025

-17% e-commerce growth 2022

-5% e-commerce growth 2023

5% e-commerce growth 2024

3 TRENDING GOOGLE SEARCHES*

1. EKO (low-price items) (∞)
2. Mangostan (800%)
3. Matcha (70%)

*2025 full year compared to 2024 full year

↑ **18.2** billion SEK in net sales 2025

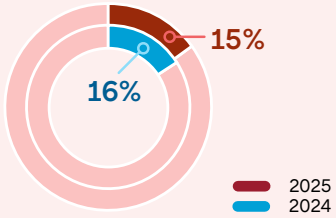
4% → share of total sector

SEK 1 531

SEK +79 since last year

Average amount spent online over last 30 days

Basis: Consumer, has shopped online, average January – December



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

Basis: Consumer, has shopped online, average January – December

Percentage of women and men who have shopped online in the category

	Women	Men
2025	17%	13%
2024	18%	13%

Basis: Consumer, has shopped online. Average January – December

Technology as a natural part of everyday life

After several years in the red, the online home electronics sector enjoyed positive full-year growth of 11 percent. 2025 was a year of recovery for the sector, which had been struggling with negative growth since 2022.

A clear trend in 2025 was the integration of AI in increasing numbers of products, which during the fall has driven sales of everything from robot vacuum cleaners to smart rings.[1] At the same time, beauty tech has become increasingly popular and emerged in the borderland between home electronics and beauty; for example, the segment grew by 600 percent at home electronics and white goods chain Elgiganten over the past year. Smart mirrors and advanced facial cleansing brushes are two products that have become increasingly popular as consumers invest more in technology-based self-care in the home.[2]

Many of the trends are driven by social media such as TikTok and YouTube. The impact of social media was particularly evident during the Christmas shopping period, when wish lists were dominated by electronics brands alongside viral collectibles such as Labubus.[3]

In parallel, the market is also clearly influenced by political decisions. When Nintendo Switch 2 was released during the summer, many people were critical of the fact that the price was higher in Sweden than in the neighboring Nordic countries, which could largely be explained by Sweden's electronics tax. As of the start of the year, the electronics tax has also been increased, meaning a higher cost for companies and consumers.[4] Since December 2025, the Simplification Council has supported the proposal to abolish the electronics tax and instead adhere to EU-wide regulations.[5]

The sector's performance in fall and winter 2025 provides an indication of what lies ahead in 2026, with innovation at the heart of the sector.

[1] Svea Bank, December 2025 [2] Elgiganten, October 2025 [3] E-handel.se, December 2025 [4] ElektronikBranschen, November 2025 [5] ElektronikBranschen, December 2025

-10% e-commerce growth 2022

-3% e-commerce growth 2023

-1% e-commerce growth 2024

11% e-commerce growth 2025

3 TRENDING GOOGLE SEARCHES*

1. Nano Banana (∞)
2. Nintendo Switch 2 (2.65%)
3. iPhone 17 (2.15%)

*2025 full year compared to 2024 full year

↑ **30.2** billion SEK in net sales 2025

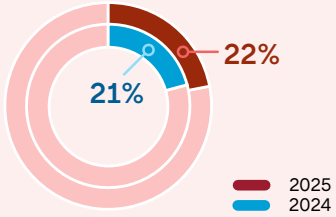
51% ↑ share of total sector

SEK 2 486

SEK +252 since last year

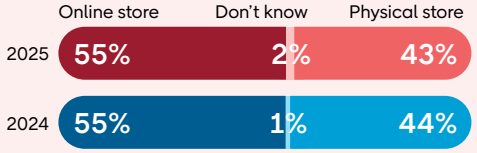
Average amount spent online over last 30 days

Basis: Consumer, has shopped online, average January – December



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

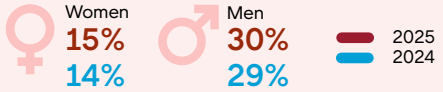
Basis: Consumer, has shopped online, average January – December



Percentage who made their most recent purchase in the category in an online store and in a physical store, respectively

Basis: Consumers who have shopped online

Percentage of women and men who have shopped online in the category



Basis: Consumer, has shopped online. Average January – December

From throwaway items to a wardrobe put together with care

The clothing and footwear sector enjoyed positive growth throughout 2025, achieving growth of seven percent for the full year. According to Stilindex (Svensk Handel's Style Index), e-commerce accounted for the biggest growth in the clothing and footwear sector overall during the year – with women's clothing and the low-price segment leading the way.[1]

At the same time, foreign e-commerce platforms continue to put pressure on Swedish online clothing retailers. Since 2024, e-retailer Nelly has been in a legal dispute with the Chinese discount retailer Shein, after Shein used Nelly's images in its marketing. When the judgment was handed down in the second half of 2025, Nelly won on the merits but still had to pay Shein's legal costs. The ruling may discourage other market participants from pursuing similar cases, thus allowing discount retailers to expand in the Swedish market.[2]

The sustainability trend in the fashion sector continued to consolidate during the year, with the second-hand sector being a particularly strong performer. One example is Sellpy, which tested its wings in physical stores through a pop-up shop at the NK department store in Stockholm.[3] Another example is the capsule wardrobe – a concept based on the frequent use of a limited number of garments in coordinated colors, the aim being to create a wardrobe that is actually used and to reduce unnecessary purchases.[4] Several market participants, including Åhléns and Cubus, offer guides outlining how consumers can create their own capsule wardrobes themselves. A phenomenon countering this minimalism is that many young people, according to the Ungdomsbarometern youth survey, wish to maximize and embody their style through color, layering and unique second-hand garments.[5] This may result in more garments in their wardrobes.

Overall, the clothing and footwear sector is impacted by both international competition and changing consumer preferences. As sustainability increasingly shapes the way consumers think and shop, it is becoming more crucial for market participants, large and small, to consider how their particular business fits in with new consumer preferences.

[1] Style Index, January 2026 [2] Dagens Nyheter, October 2025 [3] Elle, April 2025 [4] Femina, November 2025 [5] Ungdomsbarometern, December 2025

7%
e-commerce growth 2025

2% e-commerce growth 2022

3% e-commerce growth 2023

6% e-commerce growth 2024

3 TRENDING GOOGLE SEARCHES*

1. Adizero Evo SL (∞)
2. Asics Gel-Nimbus 27 (∞)
3. Trenchcoat (∞)

*2025 full year compared to 2024 full year

↑ **21** billion SEK in net sales 2025

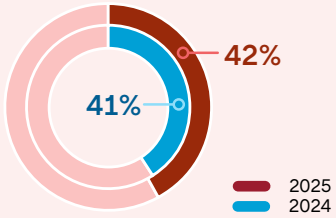
32% ↑ share of total sector

SEK 1 268

SEK -5 since last year

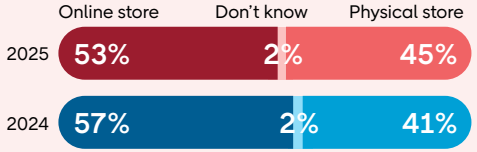
Average amount spent online over last 30 days

Basis: Consumer, has shopped online, average January – December



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

Basis: Consumer, has shopped online, average January – December



Percentage who made their most recent purchase in the category in an online store and in a physical store, respectively

Basis: Consumers who have shopped online

Percentage of women and men who have shopped online in the category

Basis: Consumer, has shopped online. Average January – December

Pop-ups and home visits – new ways to meet customers

Furniture and home furnishings performed strongly in 2025, showing the strongest growth in half of the year's quarters among the sectors tracked by E-barometern. Full-year growth ended up at 18 percent, and the share of e-commerce in the sector increased to 15 percent, compared to 13 percent last year. The sectoral boost is partly due to consumers having better finances in 2025, and partly due to weak comparative figures.

Market participants in the sector are taking different approaches to engaging consumers. In the fall, for example, Ikea conducted their "Ikea knocks on the door" initiative, the aim being to understand more about the Sweden we live in and to meet people who may not currently be customers at Ikea.[1] The e-retailer Jotex is taking a different approach to reaching consumers, launching an online pop-up shop in the second half of 2025 in collaboration with influencer Edvin Törnblom.[2] An online pop-up shop is a temporary digital store that offers a unique and often interactive shopping experience in addition to the regular online store.

With a strong 2025 behind it, the furniture and home furnishings sector is embarking on the coming years from a solid platform. The fact that consumers have more money in their pockets, combined with the lower mortgage repayment requirement to be introduced in April 2026, is expected to increase mobility in the housing market.[3] This in turn will provide better conditions for consumption linked to the home. Overall, this could provide further momentum for the sector going forward.

[1] Ikea, October 2025 [2] Elle, September 2025 [3] Retail Outlook report, December 2025

18%
e-commerce growth 2025

-8% e-commerce growth 2022

-6% e-commerce growth 2023

4% e-commerce growth 2024

3 TRENDING GOOGLE SEARCHES*

1. Iittala Essence beer glass (∞)
2. Boråstapeter (∞)
3. Ikea Trofast (1 100%)

*2025 full year compared to 2024 full year

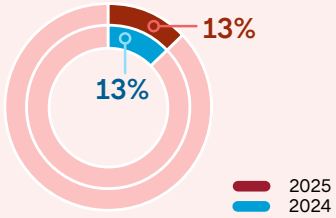
↑ 9.3
billion SEK in net sales 2025

15% ↑
share of total sector

SEK 1 532
SEK -228 since last year

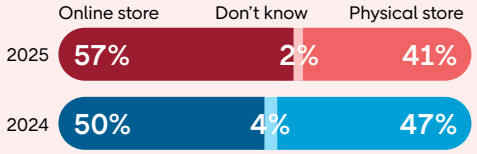
Average amount spent online over last 30 days

Basis: Consumer, has shopped online, average January – December



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

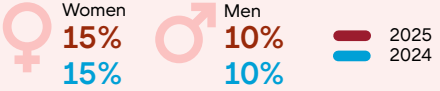
Basis: Consumer, has shopped online, average January – December



Percentage who made their most recent purchase in the category in an online store and in a physical store, respectively

Basis: Consumers who have shopped online

Percentage of women and men who have shopped online in the category



Basis: Consumer, has shopped online. Average January – December

Trends and tech are bringing the salon home

2025 marked the premiere of the beauty sector as a regular sector in E-barometern. Everything from influencer brands and new technologies to pop-up shops and sectoral shifts impacted the sector in this initial year.

In 2025, for example, the trend of "high maintenance to be low maintenance" made its breakthrough on social media. It is based on the consumer spending a lot of time and energy on beauty routines on one occasion to then save time in their daily life. 1) This may involve doing heatless curls* overnight instead of daily styling, or self-tan to create contours or freckles instead of spending time on lengthy makeup routines. The trend is generating greater demand for more long-term and effective beauty solutions.

Treatments that used to require a visit to a salon have become increasingly simple for consumers to do at home. This includes getting your nails done, as evidenced by the fact that Switch Nails has been trending in this year's Google searches. Other treatments, such as lash lifts, brow lifts and facial massages, have also become increasingly easy to do yourself.

As more people engage in beauty routines at home, more technology-intensive products have also entered the bathroom cabinet. Combining skincare, wellness and new technologies, beauty tech has grown rapidly in popularity in 2025. One of the clear favorites is the LED mask, which can reduce wrinkles, increase radiance and help ensure a more youthful complexion.
Even more advanced styling tools, such as the Dyson Airwrap, have had a strong year,2) particularly as hair has become increasingly important in terms of expressing style and identity.

What will happen in 2026 remains to be seen, but it is clear that trends and social media will continue to influence how consumers gain inspiration, try new things and design their beauty routines.

*Heatless curls are a means of curling hair without heat, using for example rods, to reduce wear on hair

1) Hello!, August 2025 2) Elgiganten, October 2025

N/A*
e-commerce growth 2025

3 TRENDING GOOGLE SEARCHES**

1. Switch Nails (350%)
2. Sweed Lash Serum (180%)
3. Lip Stain (150%)

*The Beauty sector does not have sufficient coverage to be able to define growth.
**2025 full year compared to 2024 full year

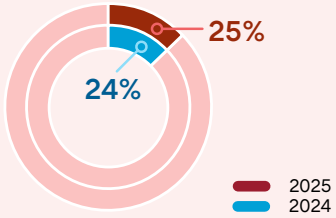
N/A
billion SEK in net sales 2025

N/A
share of total sector

SEK 646
SEK +3 since last year

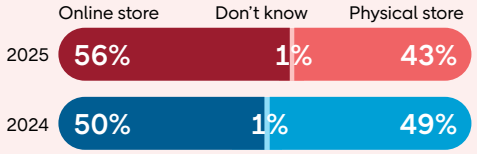
Average amount spent online over last 30 days

Basis: Consumer, has shopped online, average January – December



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

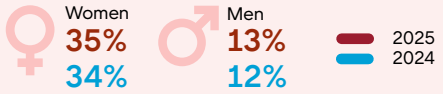
Basis: Consumer, has shopped online, average January – December



Percentage who made their most recent purchase in the category in an online store and in a physical store, respectively

Basis: Consumers who have shopped online

Percentage of women and men who have shopped online in the category



Basis: Consumer, has shopped online. Average January – December

From headwind to tailwind

After several challenging years, things brightened up for the sports and leisure sector in 2025, with e-commerce growing by five percent. The last time the sector enjoyed positive full-year growth was during the pandemic in 2021. However, the mild end to the year hit sports retail hard, with alpine and cross-country skiing losing a lot of sales, according to sports products trade association Svenskt Sportforum.[1] Running was popular in 2025, with greater interest in both running and an active lifestyle driving development and being expected to continue to do so.

AI also made its way into the sports and leisure sector during the year. For example, Oakley, in partnership with Meta, launched AI-equipped sports eyewear that can display real-time metrics, present post-activity statistics and record workouts, all without using your hands or a screen.[2] Innovations such as these show how new technologies can provide new ways for consumers to experience and use sports products.

Market participants in the sector have gone in different directions in 2025. During the year, footwear marketplace Footway, for example, chose to shift its strategy and now focuses on logistics, technology and customer support instead of owning its own brands. As part of this transition, the company sold several of its e-commerce stores, including Sportamore and Caliroots.[3] Wesports has taken a different approach, continuing to grow through the acquisition of niche specialists that operate independently, with the support of the group.[4] Together, these strategies reflect a sector seeking new ways forward after a long period of weak performance.

Despite a weak end to 2025, market participants are optimistic about 2026.[5] With a snowy start to the year and wintry conditions all over Sweden, the sports sector headed into 2026 with a tailwind. In addition, 2026 looks set to be a strong year for sport, with the Winter Olympics and soccer World Cup as well as sold-out amateur races. Major events have the potential to benefit the sport and leisure sector and continue to drive engagement and growth.

[1] Svenskt Sportforum, January 2026 [2] Meta, October 2025 [3] Ehandel, October 2025 [4] Ehandel, December 2025 [5] Svenskt Sportforum, December 2025

-8% e-commerce growth 2022

-4% e-commerce growth 2023

-2% e-commerce growth 2024

5% e-commerce growth 2025

3 TRENDING GOOGLE SEARCHES*

1. DJI Mavic 4 Pro (200%)
2. Adidas Gazelle (60%)
3. E-bike (∞)

*2025 full year compared to 2024 full year

↑ **5.5** billion kronor in net sales 2025

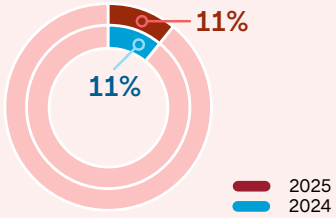
20% ↑ share of total sector

SEK 1 373

SEK +33 since last year

Average amount spent online over last 30 days

Basis: Consumer, has shopped online, average January – December



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

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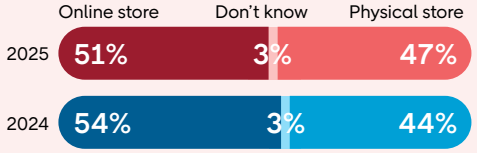

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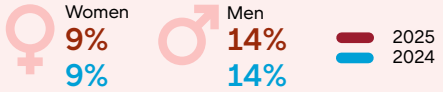


Basis: Consumer, has shopped online. Average January – December

Seven industry perspectives on what shaped e-commerce in 2025

Adyen
Tobias Lindh,
Managing Director in
the Nordics and Baltics

Didrikssons
Petra Sabo, Chief
Commercial Officer

Apotea
Yasmina Djedou,
Last Mile Manager

FirstVet
Lars-Martin Norviit, Founder

NOOS Digital Consulting AB
Anton Peterson, CEO & Founder

Hööks
Martin Richardsson,
Digital Sales Manager

Jula
Johan Sjöhagra, CEO

What factors have had the greatest impact on the development of e-commerce in 2025 – seen from the perspective of your sector?

Adyen

Tobias Lindh,
Managing Director in
the Nordics and Baltics

In 2025 retailers started to demand tangible value from AI – beyond the buzzwords and visions. The work on harvesting value from AI investments in e-commerce begins with the payment data behind each payment. It tells you something about how your customers want to make purchases. Using that payment data, we can help retailers make better decisions regarding critical factors such as conversion, transaction costs and fraud.

These dimensions of e-commerce often have conflicting objectives. Implementing overly strict risk settings (with the aim of minimizing fraud) will impact legitimate consumers and consequently conversion. The more data you can feed into your (or your payment provider's) AI solution, the better. Over the year, we saw several of the world's biggest e-retailers save money, reduce fraud and increase conversions by embracing that philosophy.

Apotea

Yasmina Djedou,
Last Mile Manager

In 2025, e-commerce in the pharmacy market entered a more mature and structural growth phase, with growth increasingly driven by a shift in channel away from physical pharmacies.

Consumers exhibit consistent price-conscious and digital behavior, further elevating the importance of scalable logistics, automation and data-driven inventory management as key competitive factors. The ability to be relevant and precise in every customer interaction is crucial.

At the same time, market participants continue to broaden their health and beauty offerings, while transport efficiency and sustainability have evolved from hygiene factors to clear cost and differentiation drivers where consumers and others are concerned.

Didrikssons

Petra Sabo,
Chief Commercial Officer

In 2025 e-commerce was shaped above all by more price-focused consumers, with stiffer competition from global discount retailers. Another aspect that had a clear impact on profitability was the continued rise in traffic acquisition costs, which has affected margins.

Consumers of outdoor products are still quality driven, but their purchasing behavior is more cautious and above all more weather dependent. This has a negative impact when, for example, winter and cold are absent.

FirstVet

Lars-Martin Norviit,
Founder

Today's customers expect instant gratification, which means that a solid platform, a relevant product range and efficient logistics flows remain crucial to an enjoyable customer experience. Pet owners are a discerning customer group, as they are essentially concerned with the care of a family member.

Credibility is therefore a basic requirement for success in our segment. We consider understanding and proximity to the customer and the needs of their animals as key to being able to offer solutions that actually help.

What factors have had the greatest impact on the development of e-commerce in 2025 – seen from the perspective of your sector?

Hööks

Martin Richardsson, Digital Sales Manager

The economy picked up and the sports sector regained momentum after three years of negative development. From our perspective, it is gratifying that equestrian sport seems to be at the forefront of development. We are seeing an increase in the number of starts in riding competitions and as the market leader in the sector, this is reflected in greater demand.

We have a broad customer base and strive to offer all horse lovers the opportunity to practice equestrian sports. A large proportion of in-house manufacturing lays the foundations for maintaining prices that suit our many customers. This trend applies to several sectors – private label products are strong.

The development of existing customers continued to be important. In the spring, we successfully re-launched our loyalty club, Club Hööks, which made an essential contribution in 2025. We were successful in recruiting members, both online and in store, allowing us to communicate more cost-efficiently with our customers in the next stage.

Jula

Johan Sjöhagra, CEO

2025 was a strong year for us, with excellent sales growth and the e-commerce share continuing to grow. Despite a market still posing challenges, with weak purchasing power, we saw several factors contributing positively to development.

Our clear and consistent low-price position has been crucial. When customers' personal finances are under pressure, many choose to shop with market participants offering affordable and reliable solutions – something we have benefited from when needs have arisen.

We are also seeing a prevailing interest in renovating, maintaining and improving homes and gardens. In a less favorable economic climate, many people are choosing to carry out simple renovations and projects themselves, which continues to drive demand in our core areas.

Overall, the combination of a strong customer offering, relevant range and clear value for money had the greatest impact on the positive trend in e-commerce during the year.

NOOS

Digital Consulting AB

Anton Peterson, CEO & Founder

Macroeconomic and geopolitical factors strongly influenced both consumer behavior and e-retailers' willingness to invest. At the same time, the sector gradually entered a new normal. Many e-retailers have accepted the conditions and chosen to work with what they have. Initiatives and investments in development and customer journeys are still being made, but priorities have become clearer and more precise – in terms of both resources and investments.

These developments have also placed much higher demands on measurability and data structure. It is no longer sufficient to be frequently visible or to drive more traffic if there is no clarity in your value proposition and relevance to the recipient. For this reason, issues regarding metrics, data quality and structure became more central than before.

In an increasingly fragmented ecosystem, in which third-party data has become less reliable, first-party data has become crucial. Data structure, CRM and the ability to acquire a comprehensive view of the customer journey have become critical competitive factors. It is no longer a question of individual campaigns or channels, but about understanding and acting on the big picture.

Another distinct change in 2025 was how AI evolved from being something tested alongside ordinary operations to becoming a natural part of day-to-day work. AI was increasingly integrated in content, analysis, optimization and planning processes. This resulted in new opportunities, but also new requirements for infrastructure, the data basis and process mapping. AI also made its way into everything from strategic decision-making forums to operational tasks, which in turn generated a new form of advice – sometimes articulate, sometimes raw and unpolished, but with a clear impact on how decisions are made.

2025 from an e-commerce perspective

This chapter summarizes the key insights from the 2025 e-commerce year. The focus is on consumers' favorite websites, the impact of omnichannel solutions on purchasing behavior, the role of the shopping cart in the decision-making process and the trends that have had the greatest impact during the year.

Second hand climbs faster than foreign discount retail

The weak economy of recent years has made consumers more price conscious. Despite the economic upturn, price consciousness, security and recognition still play a key role – as reflected in the list of consumers' favorite websites in 2025.

Apotea, Amazon and Zalando top the list for the fourth year in a row. A wide range and competitive prices are the common denominators for all market participants at the top of the list. In e-commerce, habit plays a major role. When making their most recent online purchase, 40 percent of consumers chose to purchase from that particular online store because they had purchased from there before. This behavior helps the top three positions to remain stable over time. Further down the list, however, changes have taken place: CDON and Shein are no longer on the list after having been ranked 16th and 19th respectively last year.

A clear trend on the list is the growing interest in second hand. Three second-hand market participants are among the ten most popular companies. Vinted is the biggest climber of the year, from seventeenth to eighth place.

Pharmacies continue to make their mark on the list. This year it includes three pharmacy operators, with Apotea topping the list since measurements began in 2019. With a wide range of products, competitive prices and products compatible with e-commerce, online pharmacies remain the obvious choice for consumers.

Foreign discount retail has made a big impact in recent years, but this year Shein lost its place on the list. At the same time, Temu climbed one place, probably thanks to a broader range of products and a wider age range than Shein's.

Security, value for money and past experiences remain important factors, while new market participants and business models – especially second hand – are gaining ground as consumers' online favorites.

Consumers' online favorites 2025

The arrows show how the companies' rankings changed compared to the previous year.

Ranking	Company	(2024)	
1	Apotea	(1)	→
2	Amazon	(2)	→
3	Zalando	(3)	→
4	Sellpy	(4)	→
5	H&M	(5)	→
6	Tradera	(7)	↗
7	Temu	(8)	↗
8	Vinted	(17)	↗
9	Adlibris	(6)	↘
10	Apoteket	(10)	→
11	Inet	(12)	↗
12	Lyko	(11)	↘
13	Boozt	(9)	↘
14	Webhallen	(13)	↘
15	Matsmart	(15)	→
16	Åhléns	(14)	↘
17	Bokus	(18)	↗
18	Apotek Hjärtat	(New)	↗
19	Kicks	(20)	↗
20	Lindex	(New)	↗

Increased · Unchanged · Decreased

Basis: Consumer, has shopped online, summary January – December

Features important to consumers when choosing an online store

	Total	aged 18–29	aged 65–79
Good, clear information about products	97%	92%	99%
Easy to navigate the website	96%	91%	96%
Good search function on the website	94%	90%	94%
Being able to choose how my item is delivered	91%	84%	93%
Contact options for customer service are clearly indicated	91%	77%	95%
Good, clear information about the company	85%	81%	92%
Clear information about procedures for returns	85%	79%	92%
That it is a company/brand I recognize	79%	76%	86%
The opportunity to read reviews of the online store	71%	73%	63%
Not having to register/become a member	71%	67%	78%

Basis: Consumer, has shopped online

High demands on e-commerce continue

This year's survey clearly shows that consumer demands on e-commerce continue to grow. When consumers are choosing an online store, they base their choice on several features. Simply offering a wide range and low prices is not enough; the experience must also be simple, clear and convenient.

More than 9 of 10 consumers consider clear and effective product information, easy-to-navigate websites and efficient search functions to be crucial when choosing an online store. Ease of use, convenience and seamlessness are often highlighted when it comes to payments, but these need to run through the entire purchase journey. The ability to choose how an order is delivered also plays a key role and influences consumers' choice of online store.

Perceptions of user-friendliness are relatively similar across age groups, but the differences are more pronounced when it comes to features that provide a sense of security. Older consumers have higher demands for clear information on customer service and clear procedures for returns, for example. For example, 95 percent of the oldest consumers think it is important that it is clear how to contact customer service, compared to 77 percent of the youngest.

For consumers aged between 18 and 29, one aspect is slightly more significant than for the average consumer: the possibility of reading other people's reviews of the online store. Community and user-generated content (UGC*) plays an increasingly important role in the purchase journey, providing consumers with inspiration and helping them to form an opinion on whether or not the online store is secure and trustworthy.[1)]

Today, consumers expect e-commerce to work seamlessly on several levels at once. When previous competitive advantages have become standard, it is the details that determine consumers' choice of online store.

*UGC (user-generated content) is content created by consumers rather than brands, including reviews, images or posts.

[1)] Forbes, 2024

Simplicity is a priority but sustainability is desired

Consumers are increasingly satisfied with e-commerce. Sustainability tops the wish list of what online stores should work on more, but when it comes to what consumers think they should prioritize, simplicity is given the most weight.

Compared to last year, consumers have fewer requests for improvements, indicating an increase in satisfaction. At the same time, almost half of consumers want online stores to prioritize simplicity, suggesting that user-friendliness is still crucial. Many consumers would like to see an improvement in features that can simplify and support consumers in their purchase journey, such as access to product reviews or better customer service availability.

Sustainability is at the top of the wish list, yet only 14 percent of consumers think it should be a priority. This suggests that sustainability is important to many people, but rarely a decisive factor when making a purchase. One explanation for the slight increase in the percentage of consumers who think sustainability should be a priority this year compared to last year is consumers' increased scope for consumption.

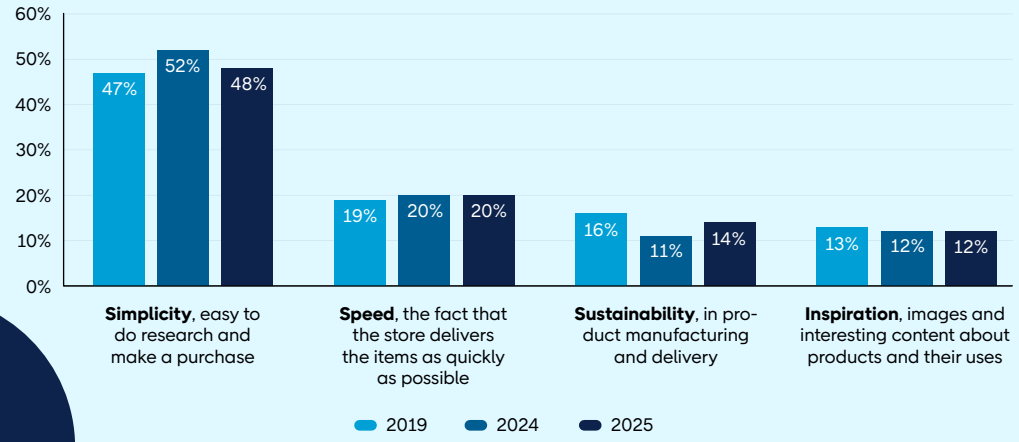
Those online stores that manage to combine features that consumers value highly, in particular simplicity and speed, are enhancing their position in the market. Vinted is an example of a platform that combines both of these features, but also offers a sustainability mindset and low prices, assisting in its climb up the list of the year's favorite websites. A similar pattern can be found among online pharmacies, where rapid deliveries, a wide range and low purchase thresholds drive popularity. Services such as collection within two hours at Apotek Hjärtat [1] and free shipping and speedy deliveries at Apotea [2] help ensure a smooth and convenient e-commerce experience.

E-retailers are getting better at living up to consumer expectations, but there is still scope for making the purchase journey even simpler and more convenient. Investing in sustainability may also become more important as consumers have more money in their pockets and can actually afford to prioritize sustainable choices.

58%
of e-commerce companies prioritize simplicity*

[1] Market, October 2025 [2] Apotea, 2025

What consumers want online stores to prioritize



Basis: Consumer, has shopped online

Features consumers primarily want online stores to work on more**

	2019	2024	**2025**
Sustainability	26%	21%	**20%**
Product reviews	28%	20%	**18%**
Better availability at customer service	22%	16%	**18%**
Product comparisons	23%	19%	**17%**
Product images	24%	15%	**16%**

Basis: Consumer, has shopped online
*Basis: All e-retailers
**Multiple choice question with a maximum of three possible answers

Second hand online is challenging traditional e-commerce

Circular e-commerce is becoming increasingly important. Every quarter, the number of C2C parcels containing second-hand items increases, both in number and as a proportion of all parcels sent.

In 2025, just over 22 million parcels containing second-hand items* were sent, representing a full-year increase of 50 percent compared to the previous year*.[1)]

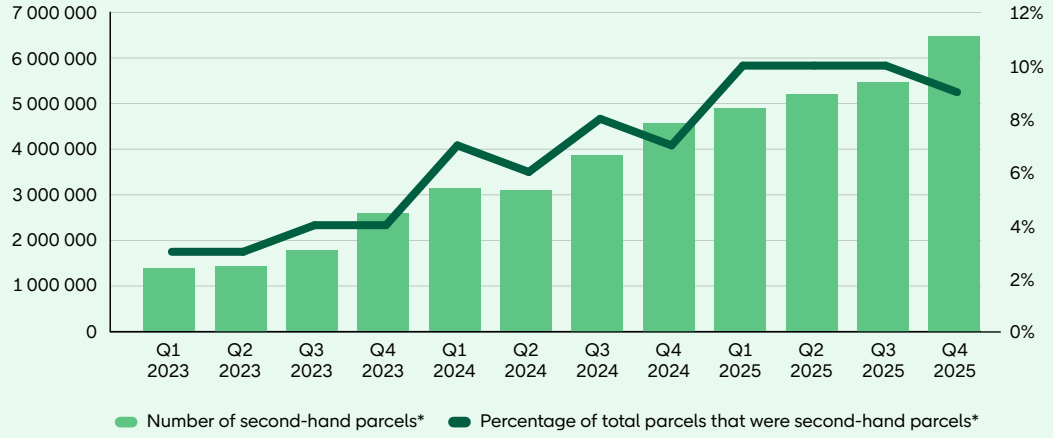
The percentage of such C2C parcels, measured based on data from the seven largest market participants, is estimated to be nine percent of all parcels sent. The share of consumers who have purchased second-hand items online, either C2C or from a company, is also slowly but surely increasing. Between 2023 and 2025, the percentage increased from 18 to 21 percent.

While interest in second hand continues to grow, a large proportion of sales is still made directly between consumers, often supported by various platforms. Although several traditional e-retailers have tried out different solutions to take control of second-hand sales of their own products, this is not yet as well established as C2C sales. The challenge for many e-retailers is to find practical and profitable ways to integrate second hand in their regular offering.

What the future holds remains to be seen. What is certain, however, is that second hand is not only an alternative to regular e-commerce, but a natural part of online shopping for many consumers.

[1)] Source: Parcel Index Q4 2025

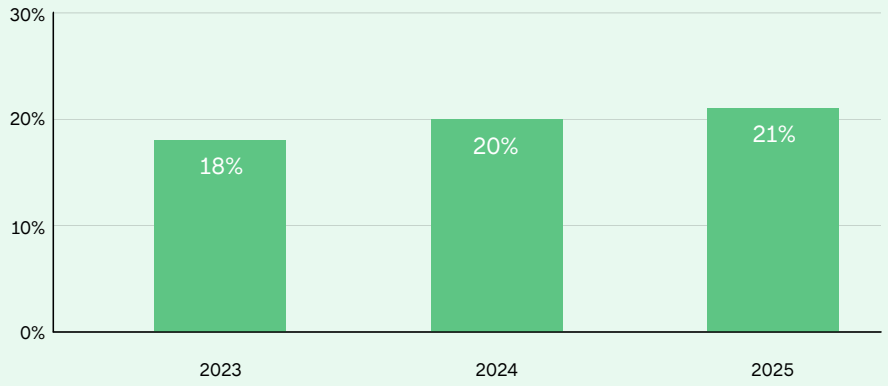
Second-hand parcels



Source: Parcel Index Q4 2025

*Second-hand parcels include parcels sent via Blocket, Bokbörsen, Plick, Sellpy, Tradera, Tise and Vinted.

Percentage of consumers who have purchased second-hand items online**



Basis: has shopped online, average January – December

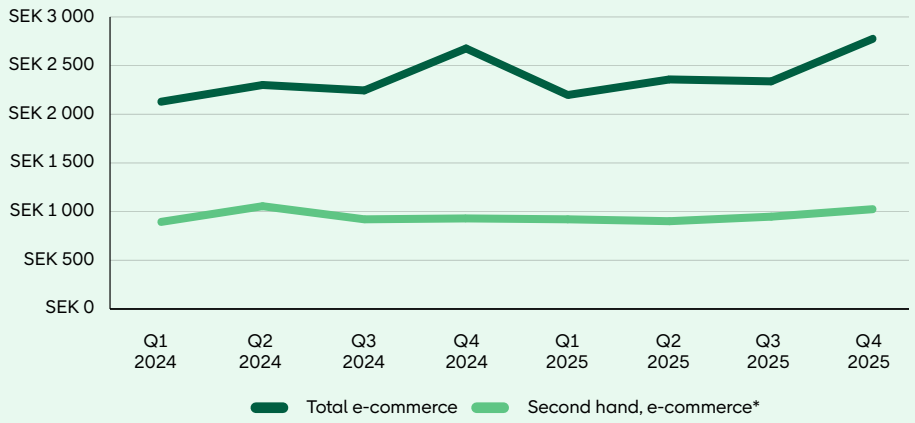
**Percentage of consumers who have purchased second-hand items online in the last 30 days

Three second-hand market participants among consumers' top ten online favorites in 2025

1	Apotea	(1)	**6**	**Tradera**	**(7)**
2	Amazon	(2)	7	Temu	(8)
3	Zalando	(3)	**8**	**Vinted**	**(17)**
4	**Sellpy**	**(4)**	9	Adlibris	(6)
5	H&M	(5)	10	Apoteket	(10)

Basis: Consumer, has shopped online. Last year's ranking in brackets.

Average amount spent by consumers per quarter



Basis: Consumer, has shopped online
*Basis: Consumer, has purchased second-hand items online

Convenience and price drive second-hand parcels

Increasing numbers of consumers are purchasing second-hand items online, and parcel volumes are growing. Almost a third of consumers' top ten favorite online stores are in the second-hand sector.

In recent years, consumers have spent an average of SEK 900 per month on second-hand items online, a relatively stable amount since measurements began in 2024. In e-commerce overall, the total varies more by quarter, with a clear seasonal peak in the fourth quarter, which is not evident in second hand. This can be explained by the fact that the Black Friday Week and the Christmas shopping period, which normally boost e-commerce at the end of the year, are not very significant when it comes to second hand. However, there are variations among individual market participants. For example, Tradera's sales increased by 18 percent during Black Friday Week in 2024. An increase was also expected in 2025.[1]

In this year's top ten list of consumers' favorite websites, second-hand market participants rank highly. Sellpy, Tradera and Vinted are among the favorites. Platforms such as these benefit greatly from making it easy for consumers to buy and sell second-hand items by minimizing contact between individual consumers and offering integrated payment, shipping and delivery solutions.

The challenge for many e-retailers wishing to participate in the second-hand market is to make their second-hand items as easily accessible as those of C2C market participants, while at the same time achieving a profitable business. Several of them have tested different arrangements, but many are still experimenting to find the right one. Some e-retailers use resale platforms to facilitate the sale of their own second-hand items, including Recrql [2] and Revive Retail[3], which is a reseller for several Swedish e-retailers. There are also international platforms that build second-hand websites for e-retailers, such as Trove, a platform that entered the European e-commerce market in 2025. [4] [5]

The strong position of pure second-hand market participants demonstrates that the second-hand market online is here to stay, and that there are opportunities for more e-retailers to participate in the market in a way that fits into their regular business.

[1] Tradera, November 2025 [2] Recrql [3] Revive Retail [4] Trove [5] Sourcing Journal, April 2025

International e-commerce is growing and changing

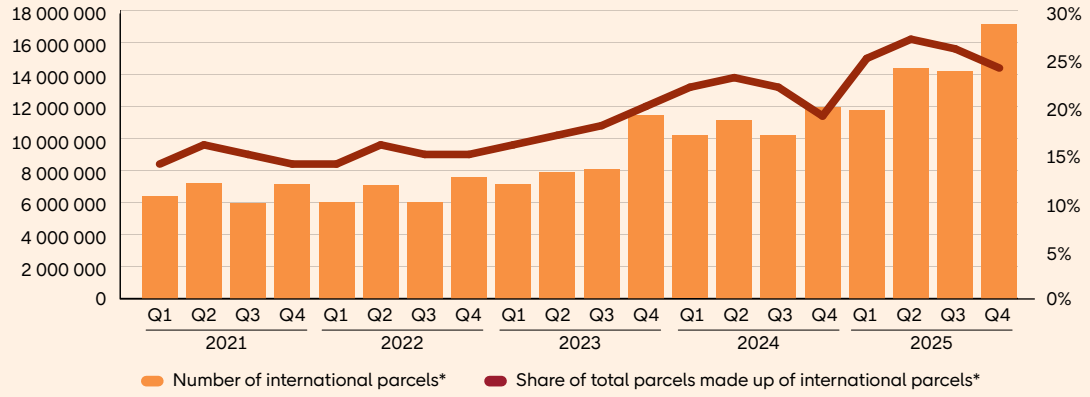
The number of e-commerce parcels from abroad continued to grow at a rapid pace during the year. China remains the top country for foreign purchases, enjoying a slight increase in share compared to last year. At the same time, the UK is losing ground and in the fourth quarter, roughly the same number of consumers made online purchases from the UK as from the US.

There are plans to introduce a customs duty for parcels sent from outside the EU and containing items worth less than 150 euros in the second half of 2026. Until then, these parcels will continue to enter the EU without any customs duties.[1] For many consumers, uncertainty regarding the amount of customs duty is expected to become a clear obstacle next fall. Many consumers think they will make fewer online purchases from abroad or stop making them altogether as even less expensive items will now be subject to customs duty and risk incurring extra charges. Women are more likely than men to say they plan to significantly reduce or stop making purchases from foreign online stores, while more men think that the change will not affect their behavior at all. One explanation could be that women are more frequent consumers of clothing, beauty and everyday products, which are often purchased from abroad precisely because they are inexpensive. When charges are added, much of this price advantage risks being eroded.

International e-commerce will continue to be strong in 2026, with no clear signs of deceleration. However, time will tell whether the new customs rules will put a dampener on the upward trend of foreign e-commerce parcels, or whether this success will continue.

[1] Source: Swedish Customs

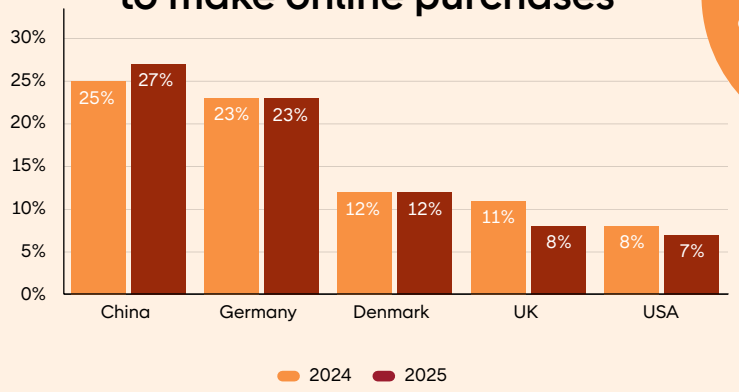
International parcels



Source: Parcel Index Q4 2025

*E-commerce parcels for which the transport journey begins outside Sweden's borders

Most common country from which to make online purchases



Basis: Consumer, has shopped online, average October – December

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

70%
think they will make fewer or no purchases online as a result of parcels under 150 euros being subject to customs duty**

Marketplaces with a broad, diverse range are the most popular

Almost half of consumers have made purchases from a foreign online store in the past year, which is on par with last year. It is most common for the 30–49 age group to make such purchases, with 55 percent having done so, as well as the 50–64 age group, with 46 percent having made purchases.

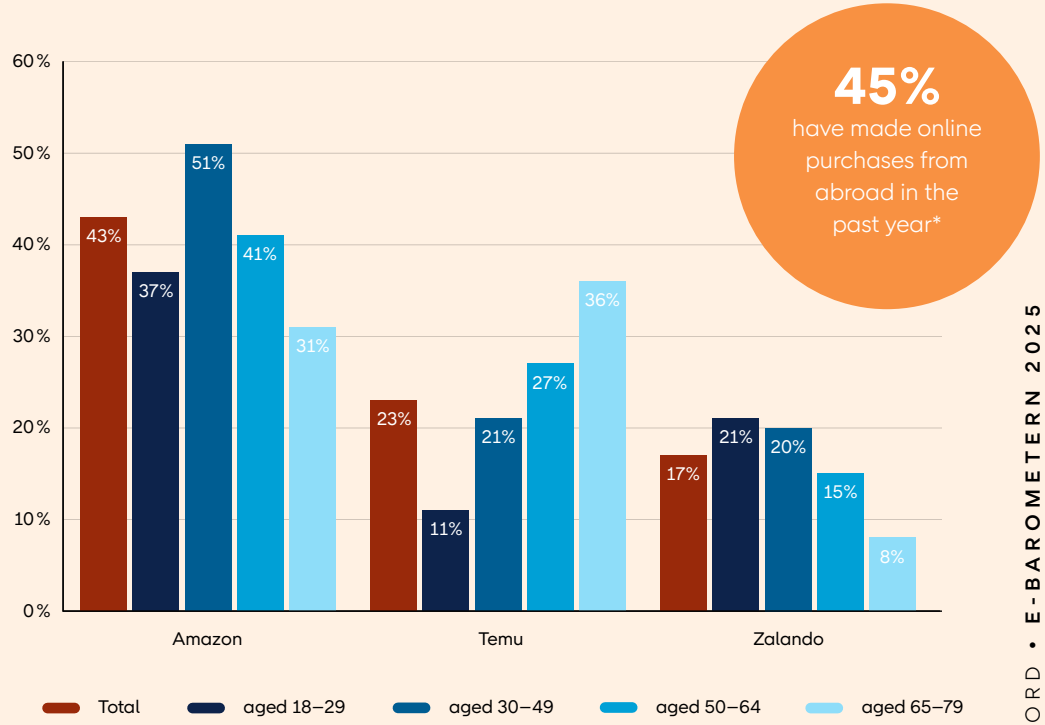
There are clear age differences when it comes to which international market-places are used. While Amazon was the most popular platform across all age groups in 2024, this year Temu overtook it among the oldest users. This is also reflected n the list of consumers' favorite websites, where Temu has climbed from eighth to seventh place while Amazon has stayed in second place. Both are broad marketplaces where you can find most items, but often with major varia-tions in both price and quality.

Almost one of four consumers have made online purchases from Temu in the past month. In just over two years, Swedish consumers are estimated to have purchased items to the tune of at least SEK 6 billion from Temu.[1] The high proportion of Temu purchases shows that low prices are attractive, especially among older consumers. However, the fact that parcels from abroad containing items worth less than 150 euros will also be subject to customs duty from the summer onwards may change the way consumers make online purchases from Chinese discount retailers such as Temu. This is a market participant that often ships items to consumers from regions outside the EU, while offering low prices. However, consumer purchases from market participants such as Amazon and Zalando are not expected to be affected to the same extent.

How different generations will make online purchases from abroad in the future remains to be seen, particularly when the new customs rules come into play.

[1] TV4 Nyheterna, November 2025

The most common international marketplaces from which to make online purchases



Basis: Consumer, has made online purchases from abroad in the past year
*Basis: Consumer, has shopped online

In which type of store did you make your most recent purchase?

Channel for consumers' most recent purchase by product category

Basis: Consumer, has shopped online. Share of consumers' most recent purchase by product category, broken down by physical store and online store. Excluding grocery sector

E-commerce has a marginal advantage

The year's survey of where consumers made their most recent purchase shows that the competition between online and physical stores continued to be a dead heat at the end of the year. At the same time, it should be noted that the fourth quarter is traditionally a strong period for e-commerce, impacted by Black Friday Week and the Christmas shopping period.[1]

After physical stores clearly having the upper hand in 2019, the pandemic left physical stores and e-commerce at almost the same level in 2020. After that, physical stores regained their advantage, but in recent years the gap has gradually narrowed. Last year, physical stores were still the most common channel for consumers' most recent purchase, but the trend is indicating a gradual shift. This year, e-commerce has taken over as the most common channel – by a narrow margin. Black Friday Week, which is particularly strong in e-commerce, has expanded in scope in recent years, contributing to the shift towards online purchases in the final months of the year.

However, consumers are not only price conscious during Black Friday Week. The situation in the economy in recent years has made them more price conscious in general. In a recession, with many people actively looking for lower prices, e-commerce becomes important for many consumers because it is easy to compare prices and find campaigns online.[2]

For most product categories, there is no major difference in terms of the channel via which consumers made their most recent purchase. The only sector that stands out is the building products sector, which is generally strongly anchored in physical stores, especially when it comes to bulky goods.

Overall, there is still a relatively even split between the channels, but with a trend towards e-commerce gradually strengthening its position. During the year, e-commerce has grown more rapidly than commerce overall, taking market share from physical stores in terms of net sales. As the economy stabilizes and the focus on price potentially diminishes, it remains to be seen whether more consumers will choose to return to physical stores or whether the e-commerce advantage will grow.

[1] E-barometern's monthly survey, November 2025
[2] Amazon, 2024

Choice of channel driven by different needs

When consumers describe why they choose a physical store or e-commerce, a clear logic emerges. The choice of channel is mainly based on practical considerations, but the reasons differ between channels. Physical stores are primarily associated with speed and the ability to see and try out items, while e-commerce is driven by availability and price.

The most common reasons for shopping in a physical store are that the consumer does not want to wait for delivery, cited by 18 percent, and the possibility to test or try out the item in store, according to 17 percent. Among consumers aged 65 to 79, the possibility of seeing the full range of products is also highlighted, and shopping in physical stores is considered more enjoyable.

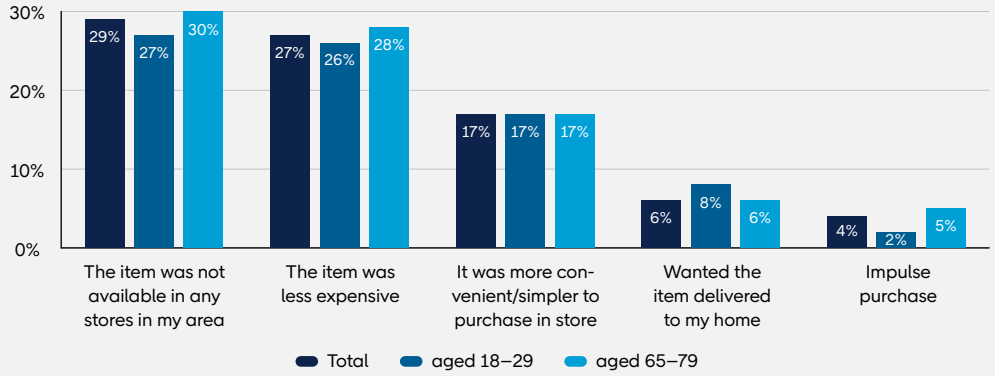
The main reasons for making online purchases are that the item is not available in nearby stores, cited by 29 percent, and that the price is lower online. This shows that e-commerce both increases the availability of products and provides better opportunities for price comparisons. The differences between age groups are small, suggesting that these reasons are equally relevant regardless of age.

Impulse purchases are increasingly made in physical stores, which serve as a place of inspiration and experiences. In e-commerce, purchases are often more planned, but many e-retailers try to encourage impulse purchases through product recommendations based on the consumer's shopping cart and previous purchases. For example, Amazon, Zalando and Apotea use various additional and product suggestions to mimic the impulse component of the physical store online.Some e-retailers also offer consumers the opportunity to add items within a certain period of time after purchase. This means that the customer has the opportunity to add additional products via the order page, something that Lyko, for example, has implemented.[1)]

The choice of channel is determined by what need takes priority at the time. The role of e-commerce is more uniform and functional, while the role of the physical store is broader and more situational, based on experiences, spontaneity and personal preferences. Rather than replacing each other, the future strength of the channels is based on their ability to meet different expectations.

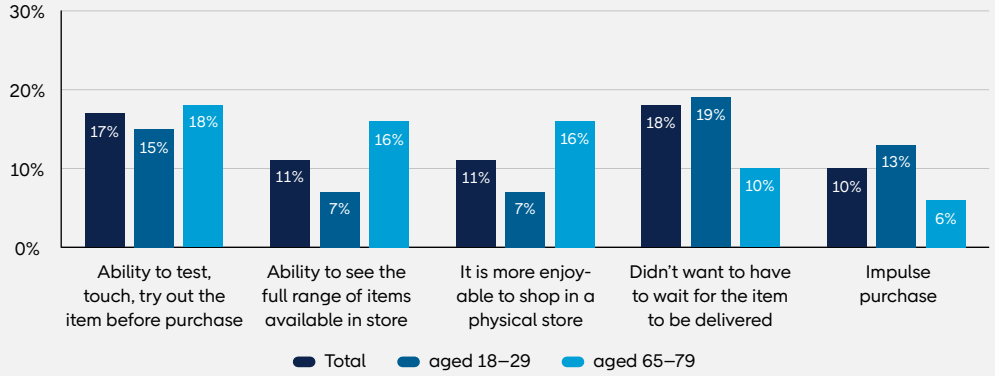
[1)] Qliro

The main reason for making purchases in an online store



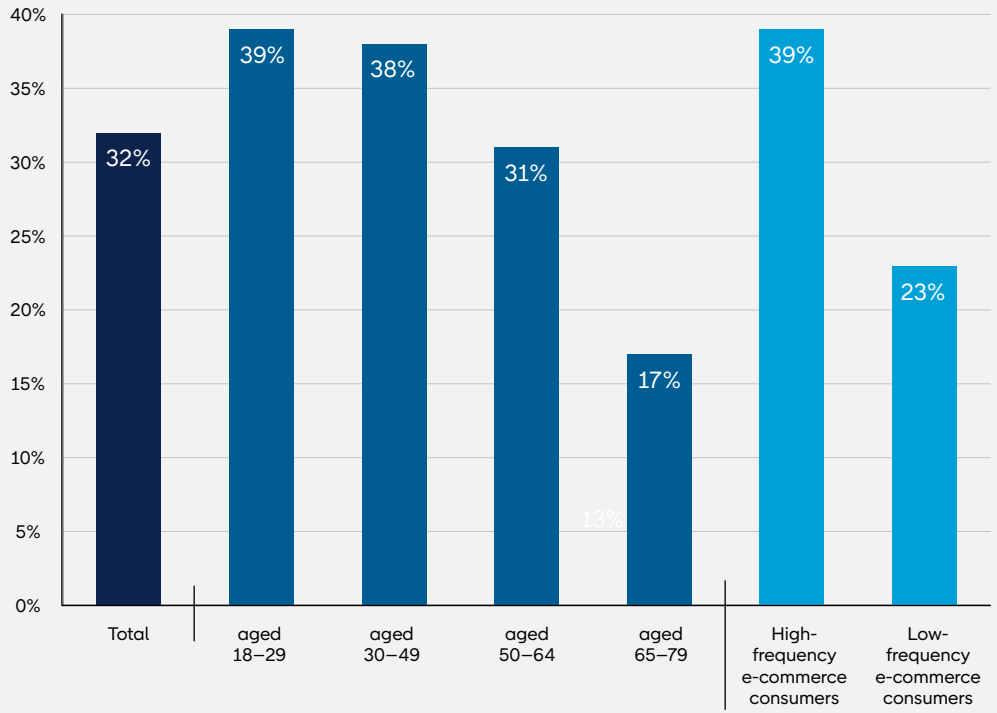
Basis: Consumer, has shopped online

The main reason for making purchases in physical stores



Basis: Consumer, has shopped online

Usually purchase items via several channels



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

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

Basis: Consumer, has shopped online

Channel switching is a natural part of purchasing behavior

Almost a third of consumers regularly make purchases via multiple channels, a proportion that has remained stable over time. Combining physical stores and e-commerce in the same purchase journey is thus an established behavior. For many consumers, it is natural to gain inspiration via their cell phone, try out the item in store and compare prices online in the same purchase journey.

The propensity to move between multiple channels is particularly high among younger consumers. They are digitally literate, find information quickly and switch effortlessly between different channels. This behavior tends to continue as people age and therefore reflects generational differences more than age per se.

Even consumers who make online purchases often switch channels to a large extent. As many as four of ten high-frequency e-commerce consumers often make purchases both online and in store. For such consumers, there is more to gain from comparing options, optimizing price and availability and using multiple channels in the same purchase process. The more purchases are made, the greater the value of even minor optimizations.

The value of omnichannel customers is confirmed by analysis from McKinsey, which back in 2022 showed that these customers both make purchases more frequently and spend more than consumers who only use one channel. On average, omnichannel customers spend around 1.7 times more than consumers who use only one channel.[1]

Overall, this shows that the channels complement rather than compete with each other. For many consumers, it is precisely the combination of channels that adds value, as they can switch between inspiration, comparison and availability before making their purchase. For these consumers, different channels fulfill different functions within the same purchase journey.

[1] McKinsey, August 2022

Pop-up shops are attractive and generate new opportunities

Pop-up shops clearly attract interest from consumers and fulfill a function that traditional e-retailers often lack: the ability to get closer to the customer and let them experience products in person.

The biggest incentive to visit a pop-up shop is to see, touch or try out products that are otherwise only available online. This is particularly true for women, with 37 percent citing this as their main impetus. This is largely because pop-up shops are often found in product categories more popular with women, such as beauty, clothing and accessories. Exclusive offers and proximity to the pop-up shop also rank highly.

2025 saw a number of new pop-up establishments in Sweden. Market participants such as Essnce, Na-kd and Sellpy all opened temporary stores during the year.[1)2)3)] International brands such as Amazon also tested the pop-up format in Stockholm.[4)]

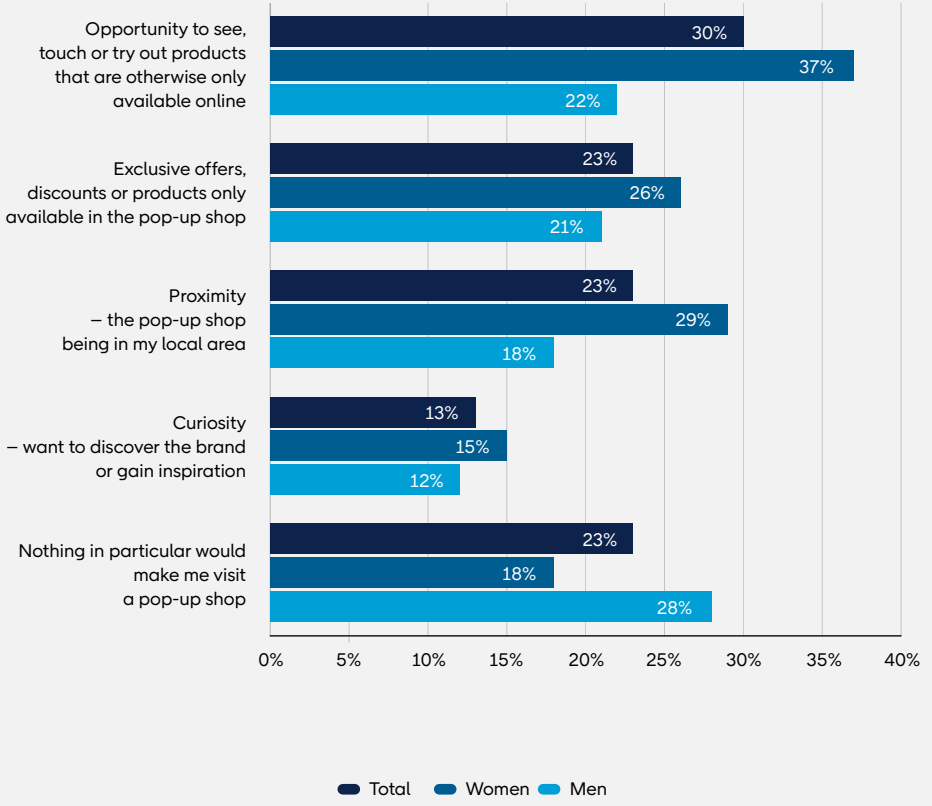
This development is in line with global retail trends. According to Forbes, the retail industry is moving towards smaller, more flexible and experience-oriented store concepts. Retail expansion is increasingly driven by the ability to rapidly test markets, generate engagement and adapt to local needs. Pop-up shops fit well into this trend, providing brands with an easy way to be physically visible, try out ideas and create experiences without committing to permanent premises.[5)]

A related example of how physical presence can boost digital business comes from the home improvement chain Clas Ohlson, which has witnessed e-commerce increase locally when a new store is opened.[6)] This shows how greater physical visibility can boost the brand and drive sales in digital channels as well. Similarly, pop-up shops can serve as a catalyst for e-commerce by increasing presence, recognition and trust.

As many consumers, especially women, are attracted to pop-up shops, they provide e-retailers with the opportunity to engage with their customers in new ways. Temporary stores allow brands to establish a presence, build relationships and supplement the digital purchase journey.

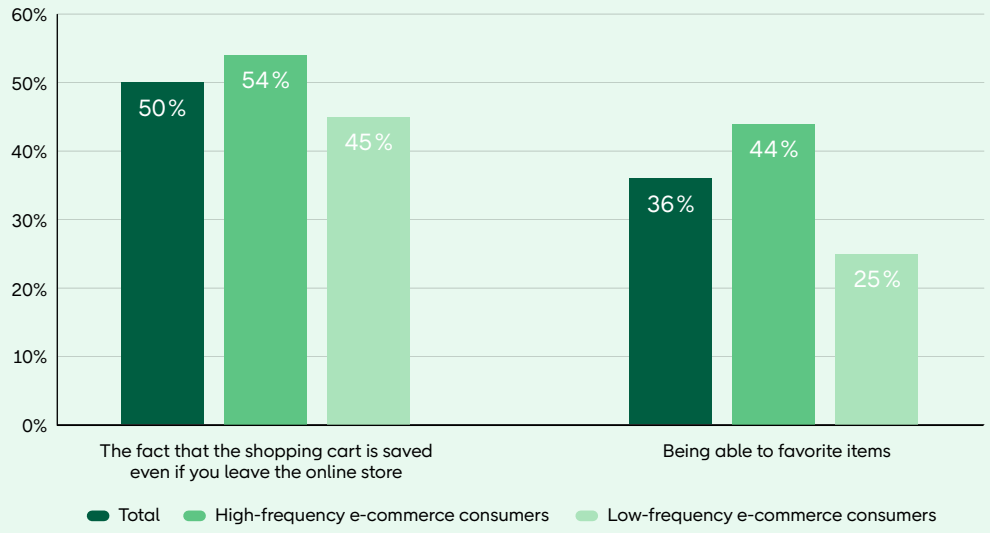
[1)] Essnce [2)] Via TT, April 2025 [3)] Na-kd [4)] Market, November 2025
[5)] Forbes, January 2025 [6)] E-barometern Annual Report 2023

What would make you visit a brand or e-commerce market participant's pop-up shop?



Basis: Consumer, has shopped online

Consumers who consider the following features important when choosing an online store



Basis: Consumer, has shopped online

3% think that AI would be of most use in assisting and completing purchases in the shopping cart*

9% use the shopping cart as a reminder with no plan to complete a purchase**

*Basis: Consumer, has shopped online **Basis: Consumer, has abandoned a purchase in the shopping cart

Shopping cart key to a sense of control in e-commerce

The shopping cart is more than the place where a purchase is completed; it is also a strategic point of reference at which consumers consider their purchases. The shopping cart gives the consumer a sense of control and an opportunity to review what they have selected and its price.

Many consumers use the shopping cart as a reminder during the research phase, and half of them consider it important to be able to save items in the cart even after leaving the online store. This feature is particularly appreciated by frequent e-commerce consumers who often pause their purchases, but want to pick up where they left off. The ability to favorite products is also appreciated, especially by frequent e-commerce consumers, but is perceived as less important than saving items in the shopping cart. One explanation for this is that favoriting often requires logging into the online store. When consumers are doing research and do not yet know what they are going to purchase, or even if they are going to make a purchase, the motivation to become a member simply to be able to favorite items is low.

The need for control in the shopping cart is reflected in consumer attitudes towards AI in the online purchase journey. Consumers consider AI to be of least benefit in the shopping cart, with only three percent considering that AI can be of use in the shopping cart and when completing a purchase.

AI checkout solutions have already been developed in the US and include Instant Checkout in ChatGPT and Copilot Checkout. These tools allow online purchases to be made directly in an AI agent but are still unknown to many consumers in Sweden.[1)2)] As AI agents grow in popularity, they are becoming an extension and simplification of the research phase, in which consumers are currently more open to using AI. The process of searching for an item to buying it then skips the shopping cart step and a purchase is made immediately.

The sense of control is crucial for consumers. E-retailers need to ensure that the shopping cart is perceived as secure, well-presented and simple and that its added value supports research and the opportunity to save items. At the same time, agentic commerce is developing at lightning speed, and the role of the shopping cart is being challenged as the e-commerce landscape evolves. AI solutions pave the way for a future in which the purchase journey changes, impacting the role of the shopping cart in both the research phase and at checkout.

[1)] Microsoft, January 2026 [2)] Open AI, September 2025

Abandoned purchases are a common part of the consumer purchase journey

It is common for consumers to add items to their shopping cart without buying them. This poses a challenge for e-retailers but with the right tools, it provides an opportunity to turn abandoned shopping carts into actual purchases. However, this requires an understanding of consumer purchasing behavior.

The percentage of consumers who have abandoned a purchase in their shopping cart in the past month is as much as 72 percent, a figure that remains stable over time. Consumers often visit the shopping cart in the research phase, long before they actually make a purchasing decision. In this phase the consumer takes their time, feels their way forward and forms an opinion about the selected items. The reasons behind abandoned purchases thus depend on consumer motivations and behavior during the purchase journey.

Price sensitivity is a common reason for abandoning a purchase; shipping costs being too high comes in first place and the purchase being too expensive in fourth. Other reasons are that the consumer got distracted by something else or realized that they did not need the product.

One tool to keep consumers from abandoning their shopping carts is the design of the online store. If e-retailers want to make them stay, it is important to give the impression of a convenient process, with consumers aware of the final price. For example, pharmacy chain Apotek Hjärtat makes the shipping cost visible in a side panel that shows when free shipping has been reached, while the consumer can continue browsing other items.[1] Another example is sustainable fashion manufacturer Asket's shopping cart, which provides an overview of the selected items, showing payment and shipping options in the same box.[2] Other tools that can generate a sense of convenience are a process meter that shows how many steps are left to checkout, fewer clicks, or intelligent recommendations combined with selected products.[3]

The challenge for e-retailers is to make a good impression in their online store and to entice the consumer back to their shopping cart. Those who got distracted by something else or used the shopping cart as a reminder need a nudge, for example via an email offering a discount on the selected products. This can lead the consumer back to the purchase journey they have initiated and increase the chance of them making a purchasing decision.

[1] Apotek Hjärtat [2] Asket.se [3] Ingrid, 2025

72%
have abandoned at least one purchase in the past month*

Most common reasons for abandoned purchases in the shopping cart

1. The shipping cost was too high	15%
2. I got distracted by something else	14%
3. I realized that I didn't need the product	13%
4. It got too expensive	11%
5. I use the shopping cart more as a reminder (I hadn't planned to complete the purchase)	9%

Basis: Consumer, has abandoned a purchase in the shopping cart
*Basis: Consumer, has shopped online

How consumers' most recent e-commerce purchases were delivered

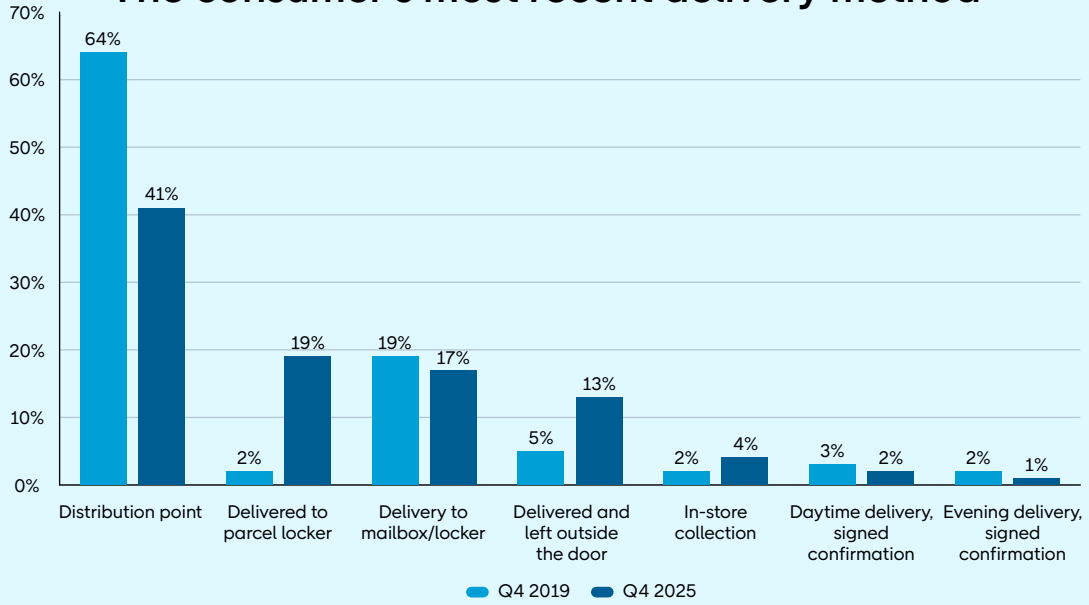
The more e-commerce is integrated in everyday life, the higher consumer expectations become. This is partly because, over time, e-retailers have gotten better at meeting consumer expectations related to choice and more seamless delivery processes.

Collection from a distribution point continues to be the most common delivery method. However, since 2019, home delivery and parcel locker delivery have grown significantly in popularity. This also became clear in E-barometern for Q2 2025, where it appears that choice trumps price in terms of the reasons for consumers choosing to abandon a purchase; this indicates that the consumer values flexibility and being able to customize their delivery.

While the use of different delivery methods is becoming popular, consumer demand for additional new delivery options is decreasing.

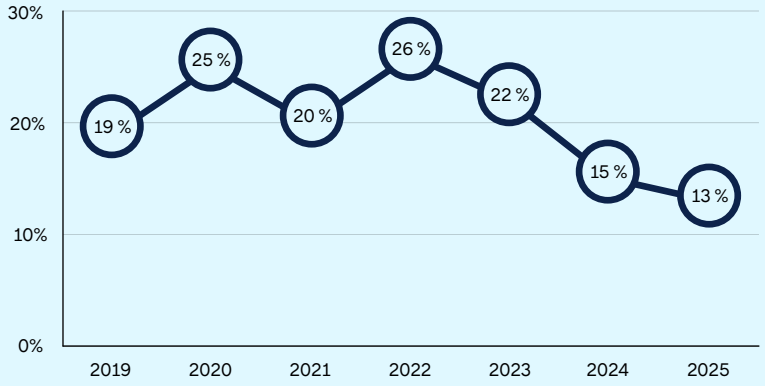
Only 13 percent want online stores to offer more delivery options, the lowest proportion since the survey started in 2019, indicating that e-retailers are getting better at meeting expectations. Going forward, the focus is on quality and maintaining the seamless delivery experience consumers now take for granted.

The consumer's most recent delivery method



Basis: has shopped online, average October – December

Percentage who want the online store to work with additional delivery options



Basis: Consumer, has shopped online

Seamless online purchases increase demands for delivery information

E-commerce consumers are generally satisfied with the information provided about their deliveries. Nine of ten feel that the delivery information was satisfactory when they made their most recent e-commerce purchase. When dissatisfaction arises, it usually concerns poorly communicated timeframes.

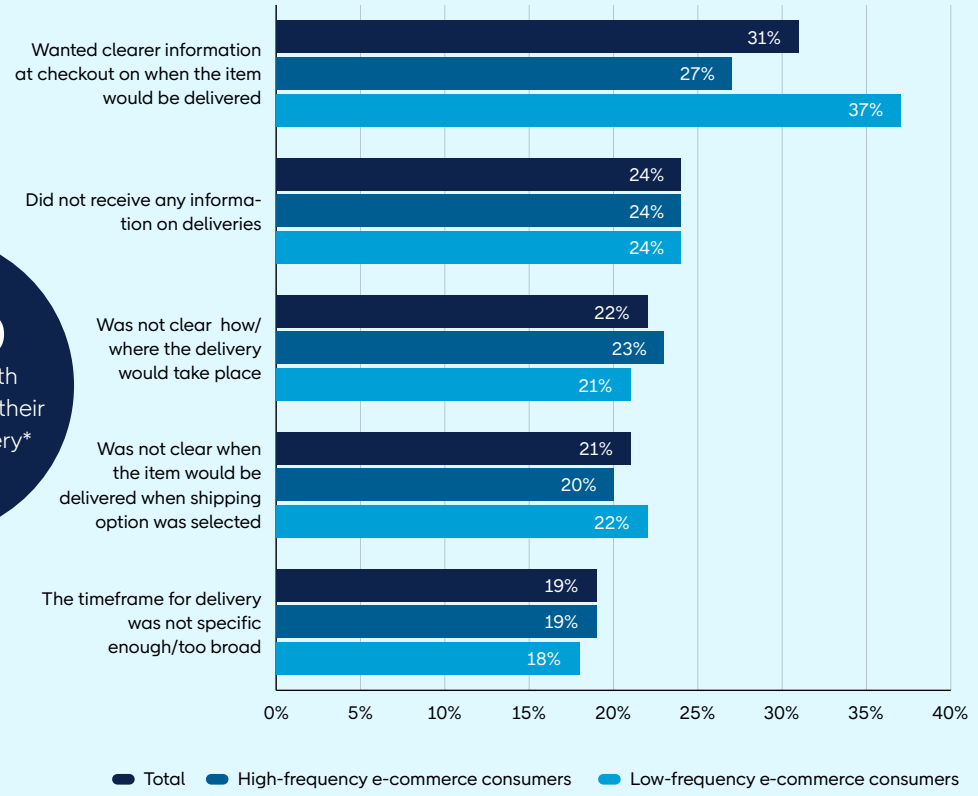
Thirty-one percent of dissatisfied consumers would have liked clearer information on delivery times at checkout, and 24 percent had not received any delivery information at all. This issue is more important for low-frequency e-commerce consumers, who have higher demands for informative and secure processes, than for high-frequency consumers, who have more experience and often are able to keep their cool even when delivery information is ambiguous.

Delivery information may differ between different suppliers and online stores, and the way consumers choose to receive delivery information, for example via email, text message or an app, also varies. E-barometern for Q2 2025 showed that one of three consumers wants to track their delivery using a delivery app, with the information they need in one place on their cell phone. Currently, delivery apps are mostly used by younger and high-frequency e-commerce consumers, but they are something that can make things easier for even more people, as the information gathered there can make it easier to obtain clear delivery information after the purchase has been made.

The majority of e-commerce consumers are satisfied with the information they receive when making online purchases. For the rest, e-retailers and logistics operators share responsibility for providing information on delivery times. One way to increase consumer satisfaction could be to encourage consumers to track their deliveries in a more convenient way, such as in a delivery app that provides easily accessible delivery information.

9 of 10
were satisfied with the information on their most recent delivery*

What consumers were dissatisfied with regarding delivery information on their most recent delivery



Basis: Consumer, if perceived delivery information to be deficient
*Basis: Consumer, has shopped online

E-commerce trends in 2026

We see three development areas that are expected to have a particularly major impact on Swedish e-commerce in 2026: the increase in household purchasing power, the rapid development of AI solutions and social commerce, which continues to take up more space in the digital purchase journey. Together, they show how both consumer behavior and conditions for e-commerce change throughout the year.

In collaboration with Google, the chapter is supplemented by an in-depth examination of how AI is reshaping the purchase journey. In addition, seven industry experts share their insights on what they think will shape e-commerce in 2026.

IMPROVEMENT IN THE ECONOMY

Finally there are signs that household finances are rallying further and consumers are starting to consume again, meaning that many deferred purchases can now become a reality. Where e-retailers are concerned, this entails new opportunities to meet increasing demand. At the same time, he uncertainty remains; despite an improving economy, the situation in the world continues to generate anxiety among many consumers. Page 38–40

AI & AGENTIC COMMERCE

AI solutions and agents continue to make their mark on e-commerce, forming an increasingly integral part of the digital shopping experience. New AI-based shopping solutions that influence the way consumers search for information, compare options and make purchasing decisions are emerging at a rapid pace. At the same time, these developments raise questions about transparency, control, trust and the GDPR. Page 41–45

SOCIAL COMMERCE

Social commerce has established itself as an essential part of the digital purchase journey, with products and brands being marketed directly on social media. Today, the platforms are mainly used for inspiration and influence. At the same time, as social commerce grows, e-retailers need to adapt to the fact that consumer feeds increasingly influence where they devote their attention and what they choose to buy. Page 46–48

What trends and challenges do you think will shape e-commerce in 2026, and what will be particularly crucial for your sector?

Adyen

Tobias Lindh,
Managing Director in
the Nordics and Baltics

Agentic commerce will be tested in further product categories in Sweden. The technology is an exciting development with a great deal of potential, but retailers need to be careful not to lose control of their transaction costs and customer relationships.

Ownership of customer relationships and data will be more critical than ever for Swedish e-retailers. Being able to collect, manage and use your customer and payment data correctly, regardless of payment method, sales channel or market, will be crucial for retailers and consequently e-commerce as a whole. This is the most important asset for retailers in terms of future-proofing their business, improving customer relationships and maximizing conversion. You cannot compromise in this area when testing different solutions for agentic commerce outside your platform.

Apotea

Yasmina Djedou,
Last Mile Manager

Ahead of 2026 we assess that the market will continue to be shaped by fierce competition, squeezed margins and increased demands for efficiency. Personalization and data-driven customer interaction become fundamental in terms of ensuring relevance, building long-term customer loyalty and scaling the business.

At the same time, **increased automation** and AI-based logistics are driving the trend towards intelligent inventory management, prediction and dynamic flows as standard rather than as a competitive advantage. This, combined with a broadened and relevant product range, will continue to be crucial to meeting increasing customer demands and boosting customer loyalty.

Didrikssons

Petra Sabo,
Chief Commercial Officer

2026 will be characterized by continued pressure on prices, rising traffic acquisition costs and stiff competition from global discount retailers.

For the outdoor sector, weather continues to be an increasingly unpredictable factor, with warmer winters putting a dampener on demand while severe weather generates short, intense sales windows.

It will be crucial to identify more cost-effective ways to drive new traffic, boost customer loyalty and upsell to existing customers. AI-driven personalization, better product data and clearer storytelling regarding quality and sustainability will be key to increasing relevance and maintaining profitability in an increasingly challenging market.

FirstVet

Lars-Martin Norviit,
Founder

In 2026 we think that relevance and timing will be even more crucial, not through "greater communication" but through better communication. At the same time, there is an increasing demand for transparency, sustainable customer loyalty and building relationships with a brand able to cope with more than just campaign-driven sales.

We have invested for several years in developing our digital experience and communication in the app and on the web, the aim being to support pet owners in the long term – not just for one-off purchases or veterinary consultations.

What trends and challenges do you think will shape e-commerce in 2026, and what will be particularly crucial for your sector?

Hööks

Martin Richardsson, Digital Sales Manager

Competition in equestrian sports is very fragmented, with a large number of more or less niche market participants. That landscape will not be changing in the near future. Our robust omni setup offering e-commerce combined with our 73 physical stores provides availability that we believe will constitute a major advantage in the battle for the customer.

Various forms of AI support exist or are making their way into all manner of tools and platforms – how can companies embrace this and create competitive advantages? The tech dialog will be dominated by agentic commerce platforms, and standards are starting to be put into place, with the focus on data structure increasing, but it is a quite a major leap for the customer from using the agents for research and planning to actually allowing them to shop.

Low-price will remain in demand, even in our sector. We believe that Hööks is in exactly the right position when it comes to high perceived value for money. At the same time, demand for second-hand items is growing. What role can retailers play in this process, which is currently largely handled by the customers themselves, outside our channels?

Jula

Johan Sjöhagra, CEO

In 2026 we think that e-commerce will be characterized by greater digital maturity and higher demands for seamless customer experiences, with customers expecting simple navigation, clear information and frictionless purchases. The low-price trend is continuing in parallel with a gradual improvement in household finances, boosting demand in the home, renovation and DIY segment.

AI is taking on a greater role as an enabler, contributing to better data quality, more accurate forecasts and more intelligent customer service. It is driving efficiency in warehousing and logistics, where AI-driven flows are already resulting in faster and more accurate processes.

Logistics will be one of the most crucial competitive factors. Customer expectations for fast, flexible and reliable delivery are growing, and fulfillment has a significant impact on both conversion and customer loyalty. The sector is therefore moving towards more delivery options, shorter lead times and greater transparency throughout the supply chain.

Overall, this means that we need to continue to strengthen our offering, develop logistics and drive digital efficiency to meet the growing demands of customers in 2026.

NOOS

Digital Consulting AB

Anton Peterson, CEO & Founder

E-commerce is entering a stage in which the difference between those who are 'keeping up' and those actually leading the development will become even clearer. AI will form a natural part of any serious e-retailer's toolbox. What determines success is not whether you use AI, but how well you manage to harness its power. It is a question of prioritizing the right position in the organization for work on AI and building on the right foundations: reliable data, a functional data structure, clear objectives, and a way of working that allows for testing, gaining insights and making adjustments at an ever-increasing pace. At the same time, we see a risk that documentation and quality will fall by the wayside as the pace increases. This is crucial at a time when decisions and changes are able to take place faster than ever.

For our sector, this means that providing commercial and technical advice, a data basis and business comprehension in implementation is increasing in importance. Everything is now interconnected in a completely different way than before, and it is no longer sufficient to optimize individual parts in isolation.

We can also see that the customer relationship is in even sharper focus. Constantly chasing new customers is both expensive and risky. In 2026 more e-retailers will need to up their retention game, with their offering strategy, customer experience and communication being linked in a completely different way to before.

When it comes to marketing, I think we will see a more distinct shift away from generic and short-term performance content. In a world in which AI is able to generate 'OK' content in large volumes, trust, branding and credible communication increase in importance. This benefits e-retailers with the courage to invest in content, storytelling and partnerships that actually matter to their target audience.

Finally, the demands for profitability and efficiency will continue to shape the entire sector. Technology choices and partnerships must deliver real business benefit, not just activity.

Wind in their sails in 2026

Many consumers are expecting a brighter outlook in 2026 where their finances are concerned. Rising real salaries, lower interest rates and an expansionary fall budget are expected to put more money in Swedes' pockets this year. This means that more people feel more secure about their finances and have the confidence to spend more.[1)]

At the same time, many consumers remain cautious. Despite their more positive view of their personal finances, 47 percent say they will not be spending more money online in any product category in 2026, while 13 percent are unsure. With several challenging years behind them, many people are still choosing to prioritize financial security.

As the economy improves, many consumers will have scope to spend money on things they have not prioritized in recent years. Among the product categories in which most people think they will increase their e-commerce purchases, clothing and footwear tops the list, followed by groceries, furniture and home furnishings and home electronics.
The fact that one in ten thinks they will do more grocery shopping online next year can be linked to a willingness to indulge in the convenience of online food shopping. In the case of furniture, furnishings and home electronics, these are largely needs that have been postponed for several years. For example, many people have waited to buy a new sofa, fix up their home office or replace their devices.[1)]

There are also clear differences between the sexes. Men are significantly more likely to plan to increase their consumption in home electronics, sports and leisure and DIY, while women are more likely to plan to increase their purchases in beauty.

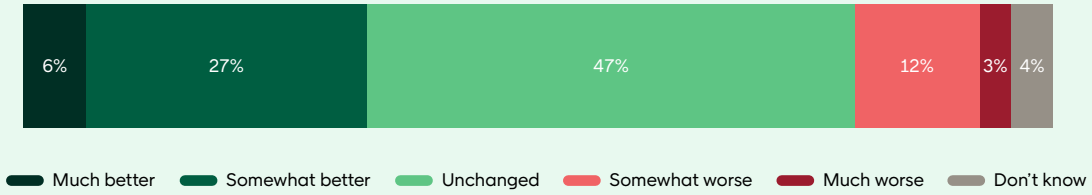
Finally, there are signs that household finances are rallying and that many purchases consumers have been putting off can now be made. Where e-retailers are concerned, this means new opportunities to meet greater demand.

47%
of consumers do not think they will be spending more in any product category in 2026 than in 2025*

13%
of consumers are unsure whether they will be spending more in any product category in 2026 than in 2025*

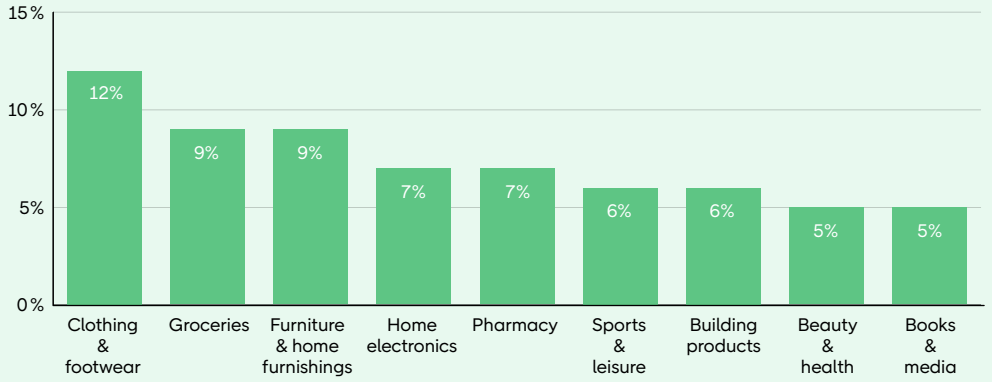
[1)] Retail Outlook report, Q4 2025

Consumers' expectations for their finances in 2026



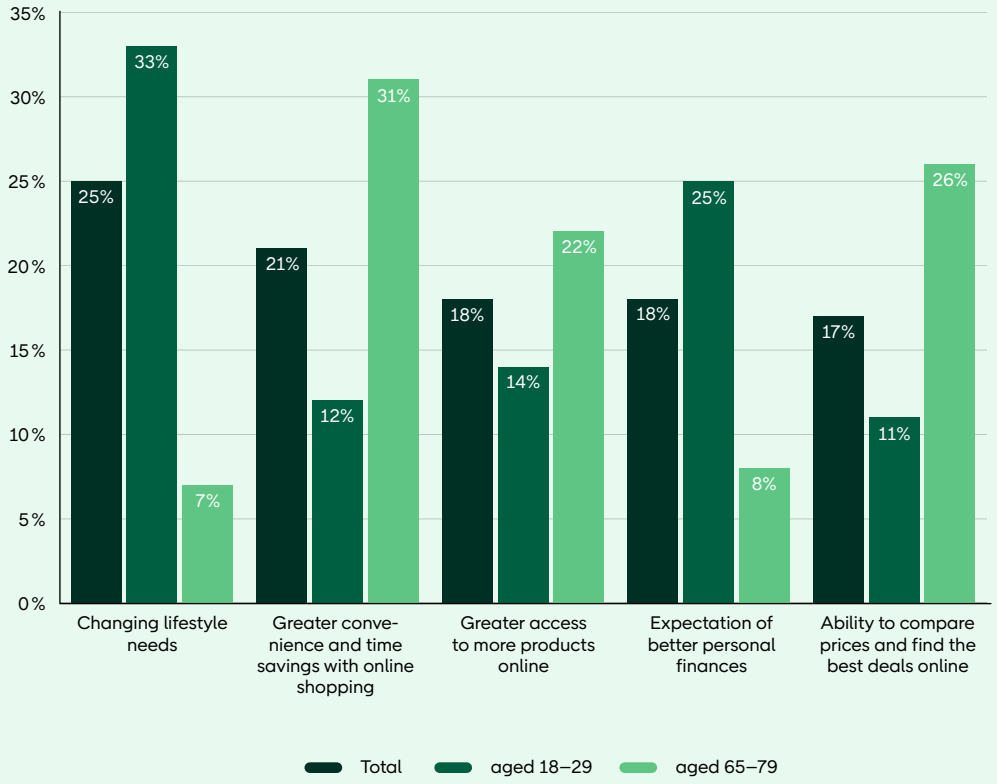
Basis: Consumers, have shopped online

Product categories consumers think they will be spending more money on in 2026



Basis: Consumer, has shopped online
*Basis: Consumer, has shopped online

Reasons why consumers think they will be making more online purchases in 2026



Basis: Consumer, has shopped online

New needs and purchasing patterns boosting e-commerce

Consumer plans to make more online purchases in various product categories in 2026 are driven by a combination of improved purchasing power, new phases in consumers' lives and changing consumer behaviors that make the many benefits of e-commerce attractive.

The main driver behind an increase in online purchases is a change in lifestyle. When consumers encounter new needs, for example when they move house or start a family, demand for items such as furniture and home furnishings increases. For younger consumers, new life stages rather than convenience are primarily behind their increased willingness to buy. The older consumers are, the less they are attracted to new purchases due to a new life stage.

Among older consumers, there is a clear shift towards more practical consumption patterns instead. In this case, new needs do not drive their online purchases, but rather a desire to simplify their daily lives. Convenience, time savings and access to a wider range online are the main reasons behind making more online purchases.

Economic factors play an important role in all age groups, but take different forms. Younger consumers are mainly motivated by the expectation of improvement in their own finances, while older consumers are more driven by the opportunity to compare prices and save money by finding bargains online.

More people are expected to make more online purchases next year due to changing lifestyles, new consumption patterns and improved personal finances. Where e-retailers are concerned, offering personalized products and simplifying the shopping experience remain important.

Uncertainty in the world is affecting how consumers make online purchases

Despite an improving economy, the situation in the world continues to worry many consumers. Almost one in five is concerned that their finances will be negatively impacted over the coming year as a result of global events, such as wars and other geopolitical events.

In 2026 the effects of trade conflicts and tariffs are expected to continue to impact commerce.[1)2)] Many consumers are expecting to modify their e-commerce habits to avoid high tariffs and fees. At the same time, more people are planning to buy more from Swedish e-retailers. One explanation is the uncertainty surrounding global supply chains and higher costs when making purchases from abroad. This is particularly true for women, who are planning to change their purchasing behavior more than men. Women also focus more sharply on the environment and sustainability. At the same time, three of ten think that the situation in the world will not affect how they shop online, while just over two of ten are unsure.

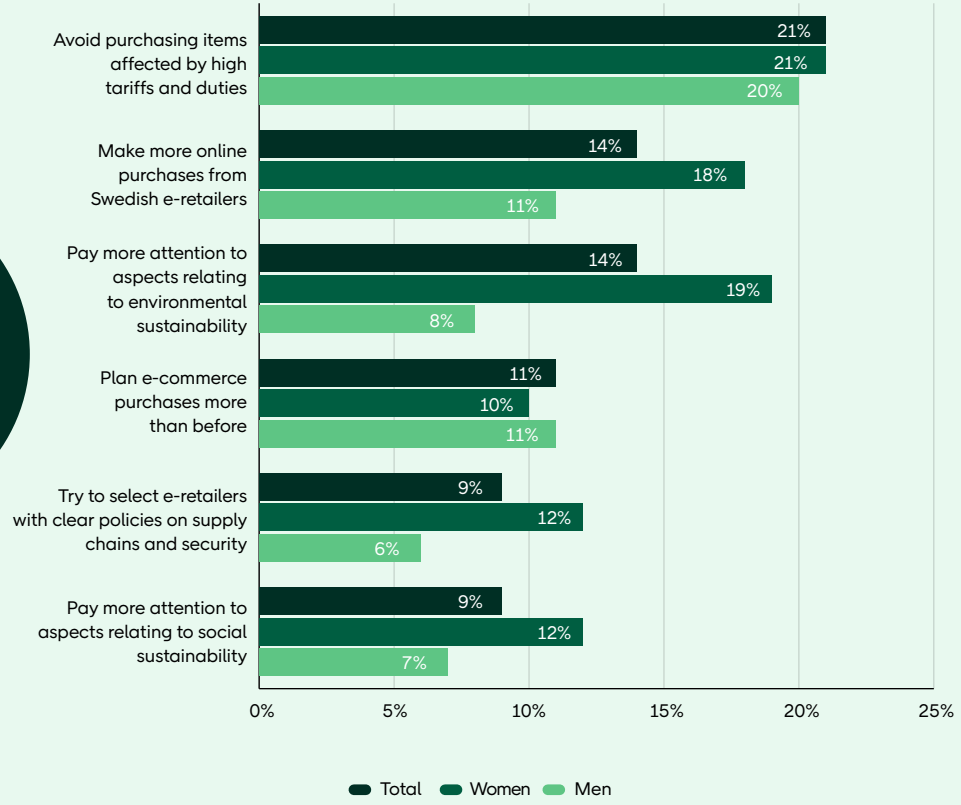
Although tariffs make foreign purchases more expensive, where many items are concerned, it will still be less expensive to buy them from abroad than from Swedish retailers. This means that higher additional costs do not necessarily stop consumers making purchases, although they may have a deterrent effect.

While their uncertainty remains, many consumers are in a stronger financial position than last year. Price continues to be a key driver, and it is clear that both security and sustainability play a major role in how many people are planning to make online purchases in 2026. This provides opportunities for Swedish e-retailers offering local, secure and sustainable options.

30%
of consumers do not think that the situation in the world will affect the way they make online purchases in 2026*

24%
of consumers do not know whether the situation in the world will affect the way they make online purchases in 2026*

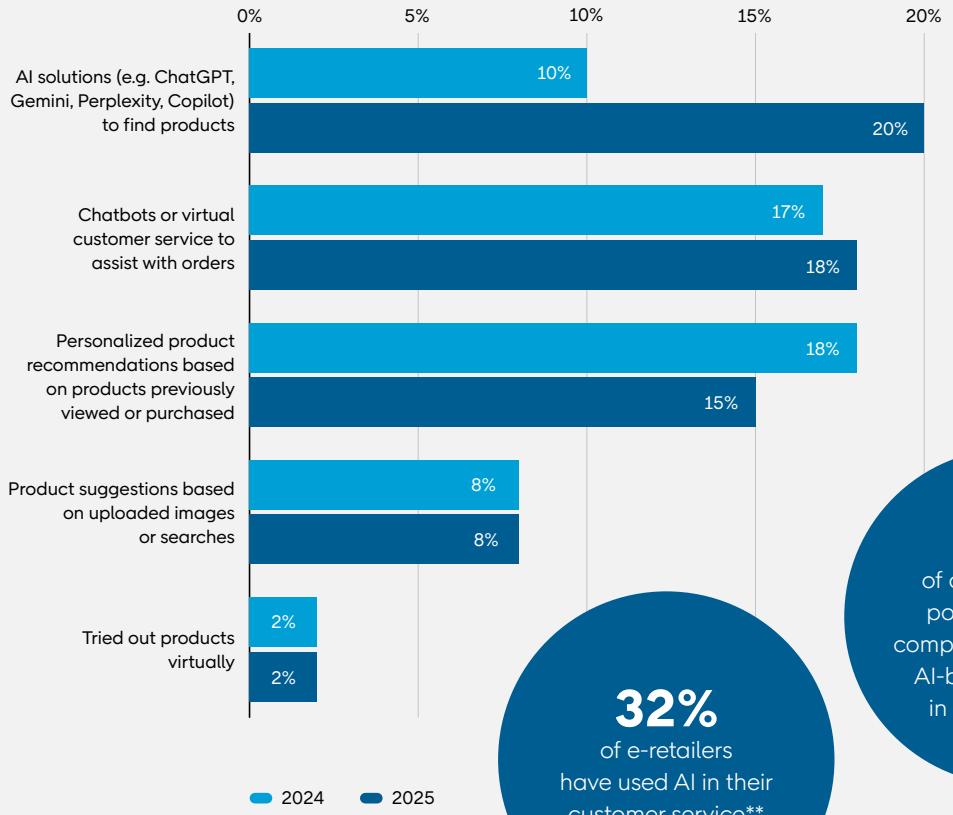
How consumers are planning to make online purchases in 2026 as a result of the situation in the world



Basis: Consumer, has shopped online
*Basis: Consumer, has shopped online

[1)] Retail Outlook report Q4 2025 [2)] UN, January 2026

Features that consumers have used in the past year



9% of consumers are positive towards companies using more AI-based solutions in e-commerce*

32% of e-retailers have used AI in their customer service**

Basis: Consumer, has shopped online
*Basis: Consumer, has made online purchases
**Basis: All e-retailers

AI growing faster than trust

Developments in AI-based shopping are moving fast. For example, Google is increasingly providing AI-generated answers directly in search results, changing how consumers find and consume information. AI-based shopping solutions are becoming increasingly available and visible, but these developments are taking place amid lingering skepticism. This creates a paradox whereby the technology spreads but consumer trust lags behind.

The use of AI agents to assist in e-commerce is increasing significantly. In just one year, the percentage of people using AI agents such as ChatGPT, Gemini or Copilot to find products has increased from 10 percent to 20 percent. In line with this development, OpenAI has introduced a shopping assistant in ChatGPT to help users compare products and make purchasing decisions.[1]

However, few consumers are in favor of companies using more AI. Many are concerned about disinformation and the fact that AI can manipulate what you think and feel.[2] There are also concerns about fraud and a sense of losing control.[3] In addition, there are ongoing discussions on how the GDPR and related regulations will apply to AI systems in digital environments, including e-commerce.[4]

Understanding of AI is still at a low level, with many consumers using AI without knowing it.[5] This makes it harder for them to see its value and reinforces their wait-and-see attitude. Fifteen percent of consumers state they have received personalized product recommendations based on what they purchased in the past, but the actual percentage is likely to be higher, as not everyone recognizes these recommendations as being AI-based.

AI is thus becoming an increasingly significant part of the shopping experience, while consumer trust is developing more slowly. The fact that its use is increasing while attitudes remain cautious shows that the technology is still at an early stage. So, for AI to have a broader impact, it needs to generate clear perceived added value for the consumer, rather than uncertainty or a sense of a lack of control.

[1] OpenAI, November 2025 [2] EY, April 2025 [3] Forrester, September 2025 [4] Ecommerce Europe, December 2025 [5] Gallup, January 2025

Strongest AI benefits early on in the purchase journey – for now

Consumers see AI as having the most benefit in the first half of the purchase journey, where it can provide inspiration, filter products and simplify the search for information. In these early stages, AI acts as an intelligent shortcut that helps consumers find their way to relevant options more rapidly. As consumers get closer to the end of the purchase journey, the willingness to let AI in decreases.

Over half of consumers are against having an AI agent manage the entire process from research to purchase, showing that control and security are still crucial factors. At the same time, shopping agents able to guide the user throughout the purchase journey and even complete the purchase are becoming more common.

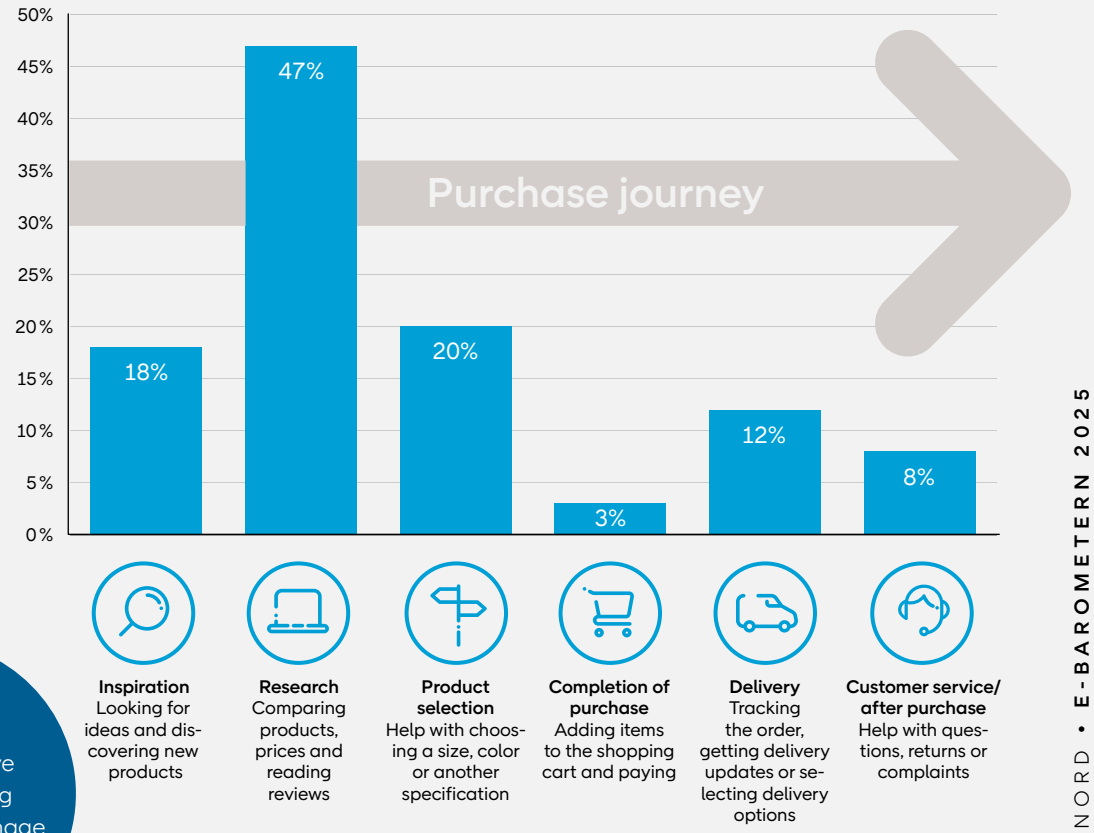
Market participants such as Myrqvist and The Mountain Studios are investing in allowing customers to make purchases directly via ChatGPT's chat.[1][2] At the same time, making a purchase directly in an AI interface means that e-retailers forfeit insight into how consumers navigate, compare and make decisions in their own channels. This in turn reduces the ability to understand consumer behavior and optimize the experience over time.

Today, the market is still at an early stage, with AI at checkout being perceived as new and abstract, making many consumers cautious. As the technology becomes more widespread and used in a larger number of services, consumers may experience tangible benefits in their daily lives, which may lead to lower resistance over time. As described in E-barometern for Q2 2025, payment solutions that are familiar are perceived as simpler and more secure. When paying via AI becomes something recognizable rather than something new, its perceived simplicity and security may increase.

AI has the potential to provide valuable support throughout the purchase journey, but consumers are not yet ready to hand over the reins. For AI to play a bigger role in the later stages of the purchase journey, companies need to be more transparent, explain how decisions are made and create features that enhance rather than replace the consumer's sense of control. At the same time, a purchase via an AI interface entails new trade-offs for e-commerce, where the reduced insight of e-retailers into customer behavior is juxtaposed with increased convenience and efficiency for consumers.

63%
are very negative towards allowing an AI agent to manage the entire purchase*

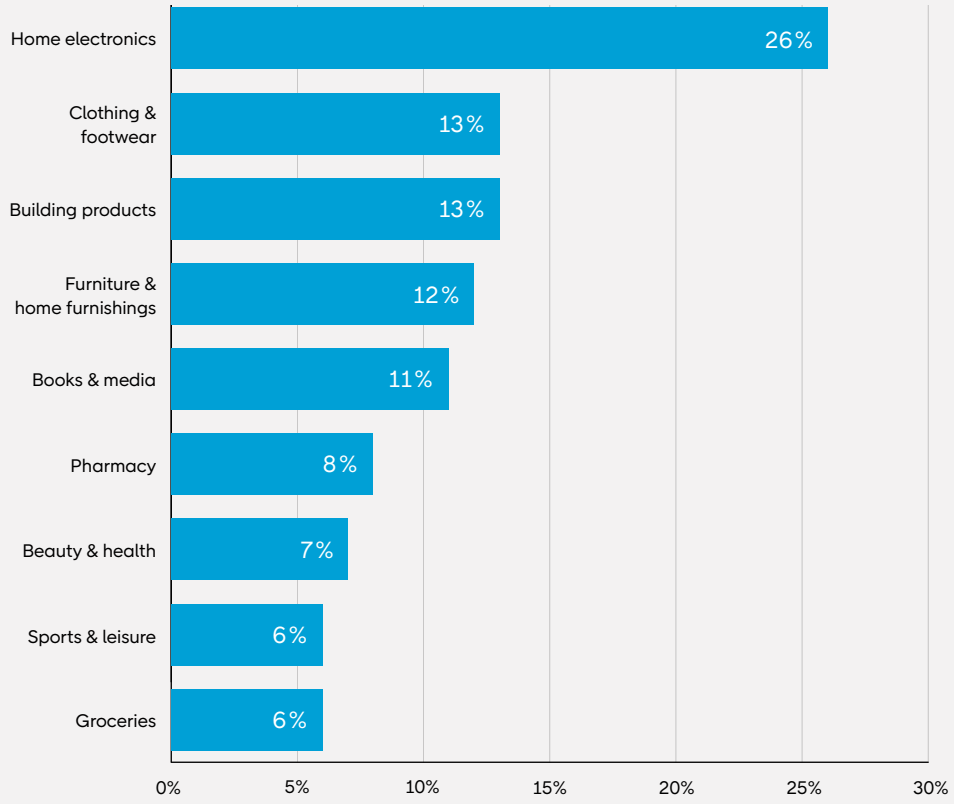
During which part of the online purchase journey do you think you would benefit most from AI?



Basis: Consumer, has shopped online
*Basis: Consumer, has shopped online

[1] Breakit, January 2026 [2] Breakit, December 2026

In which sectors do you think AI would be most beneficial to you as a customer when shopping online?



Basis: Consumer, has shopped online

Customer needs determine where AI adds real value

AI is perceived as being most valuable in sectors in which consumers need support to make the right choices, rather than in sectors where decisions are simple or based on habit.

The benefits are clearly linked to situations with many options, high levels of complexity or the risk of erroneous purchases. Home electronics is the product category that consumers most clearly associate with AI benefits. Home electronics products often differ in terms of features, specifications and compatibility, which many may find difficult to assess for themselves. At the same time, the sector is well suited to comparisons, with relatively standardized products and clear attributes such as memory, screen size, performance and price, making it perfect for AI-based guidance.

Fashion is a sector that already has a relatively large AI component in the form of size guides, style suggestions and product recommendations. For example, Zalando has its own AI assistant that helps consumers discover products and provides them with personalized recommendations[1] Consumers can see the value in finding the right fit, style or alternatives to out-of-stock products. This is a clear indication that AI is perceived as relevant when there are many choices and a high risk of erroneous purchases.

Groceries are the product category perceived to provide least benefit from AI. Purchases are often rapid and habit-based, meaning that consumers see less need for AI support. At the same time, there is a risk that its potential is underestimated. For example, AI can be used for personalized product recommendations based on previous purchases, customized offers, help in finding substitutes when items are out of stock and inspiration in the form of meal suggestions. ICA highlights the possibility of getting personalized dinner tips based on preferences such as healthy food or food that is easy to prepare, and shopping lists based on what the customer already has at home.[2]

AI is perceived as being most relevant in product categories in which consumers actually need support to make the right choices. When technology lacks a clear purpose or problem to solve, it is perceived as less meaningful. What emerges most clearly is that consumers do not demand AI "for the sake of it", but rather when it helps meet a specific need. This is particularly relevant for sectors with a lot of different options, a wide range or advanced technical specifications.

[1] Zalando [2] ICA

How Google wants to turn AI chat into direct purchases

At a time when AI is rapidly changing the way consumers discover, compare and purchase products, the next big shift is about turning the conversation itself into the purchase. This is according to Paul Mayanja, Head of Retail at Google in Sweden. With the Universal Commerce Protocol, Google wants to create a common standard that makes products directly purchasable in AI-powered dialogs, opening the door to a brand-new era of seamless and agent-driven e-commerce.

Paul Mayanja

With new AI features in Google Search and assistants such as Gemini, Swedes are searching the internet in brand-new ways – more naturally than before and in a manner more like a conversation. Soon, this will also translate into a much more convenient customer experience.

Imagine saying to your AI assistant: "I'm looking for a new suitcase for my next trip. It should be durable, easy to recognize at the airport, but still stylish. And it needs to have a compartment for my laptop." You will receive personalized suggestions immediately. You will find a bag you like, quickly join the company's loyalty program, add some accessories and a luggage tag at checkout, and pay – all without ever leaving the conversation. It is precisely this vision of frictionless commerce that Google now wants to realize.

To achieve this, Google has launched the Universal Commerce Protocol (UCP), a new open-source standard that lays the foundations for agentic e-commerce. The protocol is designed to support the entire purchase journey, from searches to checkout and post-purchase support. Initially, the new protocol will power a checkout feature that allows customers to shop directly from connected

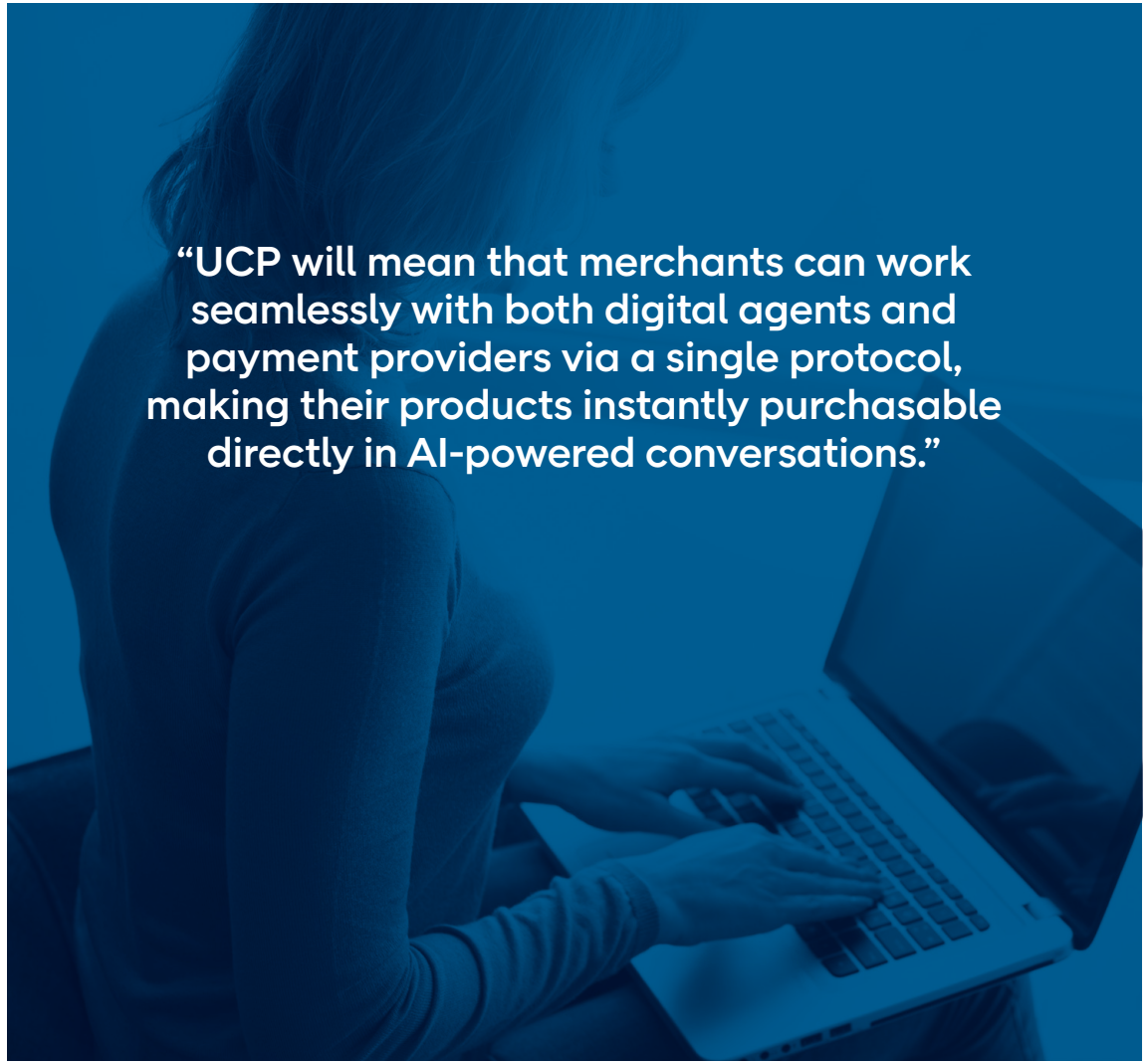
retailers in the US while in the process of searching in AI mode or the Gemini app. Standardizing how consumer platforms communicate with e-retailers' systems and agents tears down technical barriers and reduces friction in the purchase journey.

Although the checkout feature is initially being launched in the US, UCP is already supported by major European market participants such as Zalando and Carrefour. This represents a great opportunity for Swedish e-retailers. When UCP eventually becomes available in Sweden, it will mean that instead of building bespoke and complex integrations for each new AI platform, retailers will be able to work seamlessly with both digital agents and payment providers via a single unified protocol. This makes their products instantly purchasable directly in AI-powered conversations, reducing the risk of abandoned shopping carts.

Developed by Google in partnership with a range of global, industry-leading companies, UCP is built to be flexible and secure, supporting the Agent Payments Protocol (AP2). Another key element is that the retailer retains full control – they remain the Merchant of Record and own their customer relationship. The roadmap includes features such as multi-product shopping carts and links to loyalty programs, positioning UCP as a fundamental infrastructure for the agentic e-commerce of the future.

Google's objective is to create future commerce that opens new doors for everyone – a future in which customers can use the Google products they love as part of a seamless shopping experience. This allows businesses to build strong customer relationships that extend far beyond a single search or purchase. AI can help at every stage, from exploration and decision-making to delivery and everything else required to create a complete customer experience.

Where Swedish e-commerce is concerned, this is not just a technical update, but an invitation to take part in the next major chapter of digital commerce. Market participants that are early adopters of these new opportunities will be best positioned to build stronger customer relationships and win in a future where the line between conversation and conversion is completely erased.



Social commerce is marketing's new playing field

Social commerce includes marketing products and brands via social media, but also services directly linked to sales platforms in social media feeds. The latter has not yet been widely adopted in Sweden, but is expected to enter the market in the near future.

More than eight of ten consumers have not made a purchase via social media in the past month. Among those who have, Facebook is the most common channel. One reason why more consumers have not made purchases directly on social media is that the availability of these functions is limited in Sweden. The share is currently low, but is expected to increase. TikTok Shop is one example that has developed and taken off in several European markets over the past year and is expected to be available to Swedish consumers in 2026.[1]

However, consumers gain a lot of inspiration for purchases via social media, particularly via TikTok. Formats like these act as a search engine, source of inspiration and store within the user's own preferred platform.[2] The most common way to research a product from social media is to follow a link from your feed that leads to the brand or online store. Consumers aged 18–29 are more active than the average consumer, with around four of ten following product links or looking up products after having seen them on social media.

The importance of being at the forefront of social commerce varies depending on the primary target group of the e-retailers.[3] For example, TikTok is a channel that is particularly important for many market participants with a younger target audience. One market participant already exploring social commerce in its marketing in Sweden is beauty and cosmetics chain Kicks, which is moving parts of its content from traditional to social media. This is because the format and pace are appropriate for the content, as well as to create a presence on users' own platforms.[4]

As social commerce is becoming increasingly widespread and will be available in Sweden in the near future, it is important for e-retailers to prepare themselves. They need to be ready for a transition in which consumers' feeds increasingly influence what is devoted attention and determine what they will purchase and want to see more of.

[1] Ecommerce News, January 2026 [2] Shopify.com, December 2025 [3] Shopify.com, November 2025 [4] E-handel.se, January 2026

Most common social media platforms to have made online purchases from

1. Facebook	6 %
2. Instagram	5 %
3. Snapchat	1 %

Basis: Consumer, has shopped online

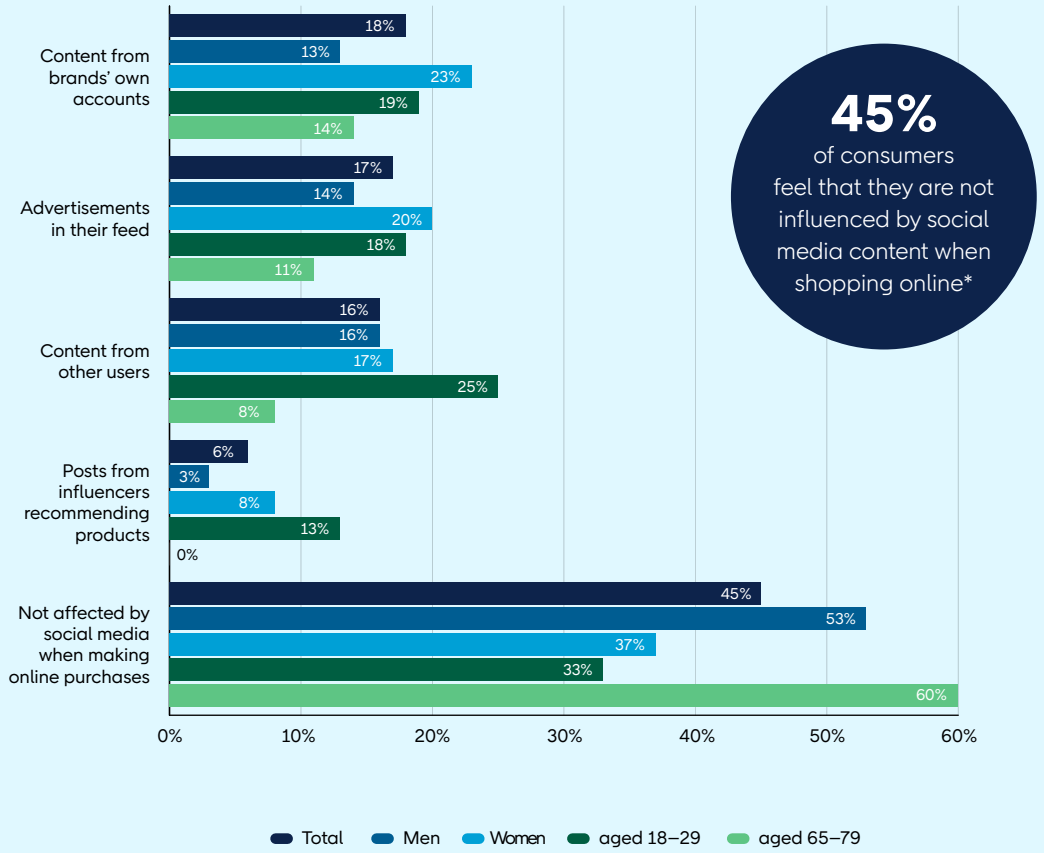
1 of 10
consumers have made online purchases via social media without leaving the app in the past month*

84%
of consumers have not made online purchases via social media in the past month*

Which of the following statements apply to you?

Basis: Consumer, has shopped online
*Basis: Consumer, has shopped online

The type of content that most influences consumers' online purchasing decisions



45%
of consumers feel that they are not influenced by social media content when shopping online*

Basis: Consumer, has shopped online
*Basis: Consumer, has shopped online

The purchase journey starts where the consumer is scrolling

Social commerce and the marketing of products and brands have thus become an integral part of social platforms. However, 45 percent of consumers feel that they are not influenced by social media content in their purchasing decisions, but the proportion actually influenced is likely to be higher. Ninety-five percent of purchasing decisions take place in the subconscious, largely influenced by emotions and what other people are doing – which can be found on social media.[1]

The main perception of consumers is that content from brands' own accounts influence purchasing decisions, closely followed by advertisements and content generated by other users. The youngest consumers stand out when it comes to content generated by other users, being more affected than the average consumer in this regard.

Such UGC content has an impact in that it provides inspiration and acting as a seal of approval. UGC makes it easy for consumers to access ratings and reviews, and the community surrounding the content generates credibility and authenticity, which is increasingly important in a digital world.[2]

Inspiration comes from a variety of social media platforms: YouTube, Instagram and Pinterest to name a few. For example, watching instructional videos on YouTube is something that six of ten Swedes have done in the past year.[3] There, users and influencers create content, for example about DIY or renovation, which can inspire people to purchase specific products.

Pinterest is a social platform where many consumers look for inspiration and do research. With the Pinterest Shopping service, users can easily go from idea to purchase via a direct link to products in e-retailers' online stores.[4] In the US, Pinterest also recently partnered with Walmart, making it possible to add recipe ingredients straight from Pinterest to your Walmart shopping cart.[5]

Purchasing decisions are driven by credible and relevant content, especially content coming directly from brands and from other consumers. The multi-channel marketing landscape is broader and at the same time more niche, meaning that e-retailers have the opportunity to reach out in more ways and need to be well acquainted with their target audience.

[1] Mind of Research, March 2025 [2] Forbes, February 2024 [3] Swedish Internet Foundation [4] Pinterest [5] Social Media Today, December 2025

Social commerce gives loyalty clubs a new role

The main reason for joining a loyalty club is to get access to better prices and offers. Expectations regarding service and practical features come second. Where loyalty clubs are concerned, this entails both challenges and opportunities, especially as consumers increasingly draw inspiration from social media.

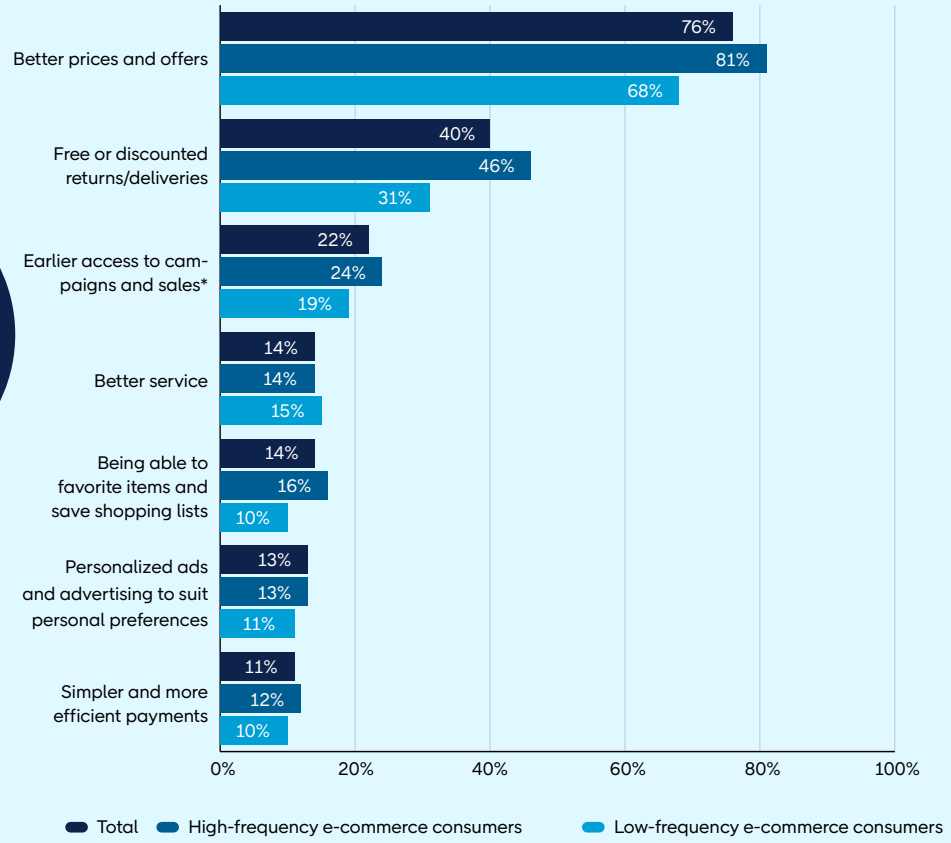
The main thing consumers expect from membership is the ability to save money. Most common expectations in this regard are better prices, followed by less expensive shipping and earlier access to campaigns. This is particularly true for high-frequency e-commerce consumers; the more purchases they make, the more they can save through free shipping, for example. As social media plays a bigger role in the online purchase journey, it also affects expectations of loyalty clubs. Better prices still top the list of expectations, but other features have the potential to broaden the role of the loyalty club, such as research and inspiration from new products.

New ways of working with content, such as UGC, provide opportunities for loyalty clubs to offer members access to other people's reviews and experiences. An example of a loyalty club in which members can share information in forums is Sephora, which offers a global community with added value such as reviews, challenges and questions. Their community platform is similar to social media, which makes it easy to use.[1] Lyko is an example of a Swedish market participant whose platform consists of a community with users and user-generated content created with the aim of producing credible product marketing.[2]

Properly designed, loyalty clubs can thus act as community platforms that build trust, engagement and brand relationships by giving consumers the space to share experiences on their own terms. More than eight of ten consumers are members of a loyalty club, offering major opportunities for e-retailers to shape their own communities in order to engage consumers going forward.

9%
are not part of a loyalty club; the corresponding figure for high-frequency e-commerce consumers is 4 percent and 16 percent for low-frequency consumers

Top seven consumer expectations when joining a loyalty club



Basis: Consumer, has shopped online
*Examples include priority access to Black Friday Week, new items or limited products

[1] Sephora [2] Lyko

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HUI Research specializes in the future consumption landscape, offering qualified decision-making, advice and knowledge marketing in commerce, consumption trends and economics to the private and public sectors. The company was founded in 1968 and is an independent subsidiary of the trade association Svensk Handel (Swedish Commerce).

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