

NielsenIQ

Find Your Next Growth Opportunity

*Decoding the Digital Consumer
and the Rise of Social Commerce*

insight
summit
2025

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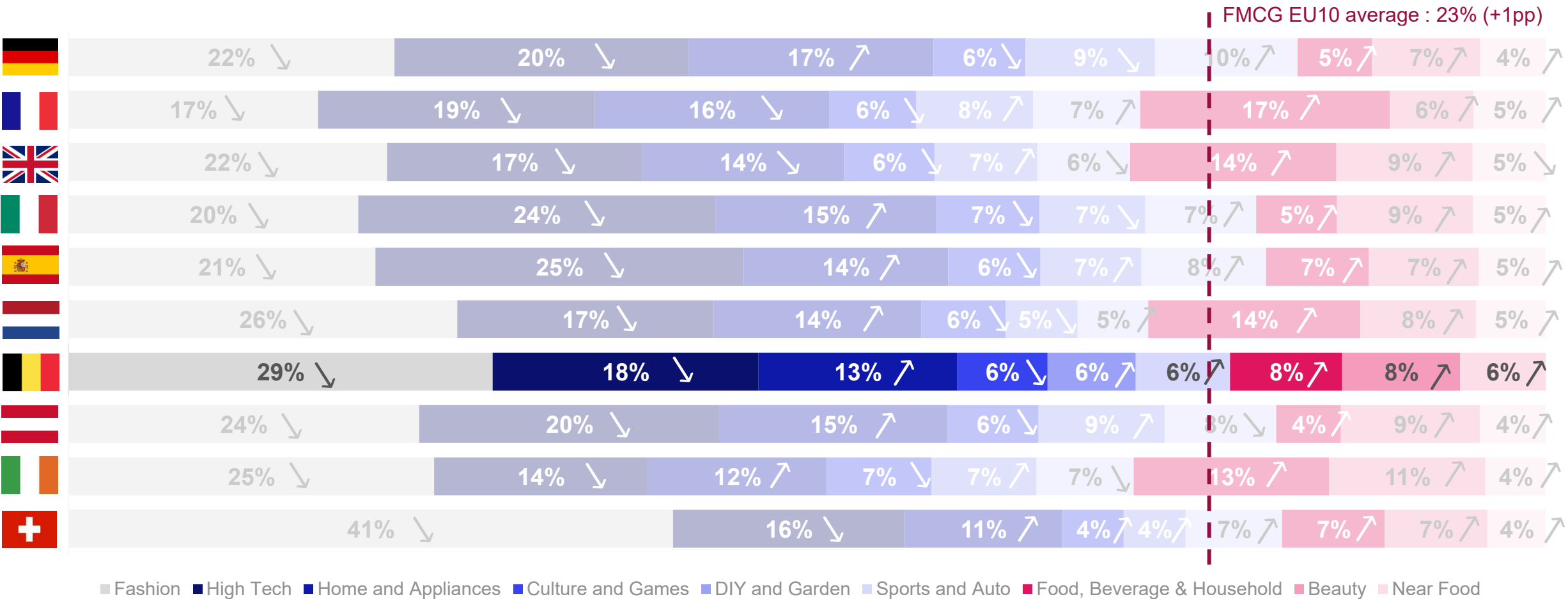
Channel Pulse: Where E-Commerce is Winning

*A Deep Dive into Market
Share and consumer
preference shifts*

E-com landscape shift: fashion and high tech lose ground to everyday essentials

Category mix in value in B2C e-commerce of goods

Total e-commerce of goods – Latest MAT 2025



Source: NIQ Digital Purchases. West Europe = UK, DE, FR, IT, ES, NL, BE, AT, IE., CH E-commerce of goods (services excluded). Data ending 31 August 2025

Germans spend the most, UK e-shoppers more frequently

Average online consumer spend and purchase frequency per country

Total e-commerce of goods – Latest MAT 2025

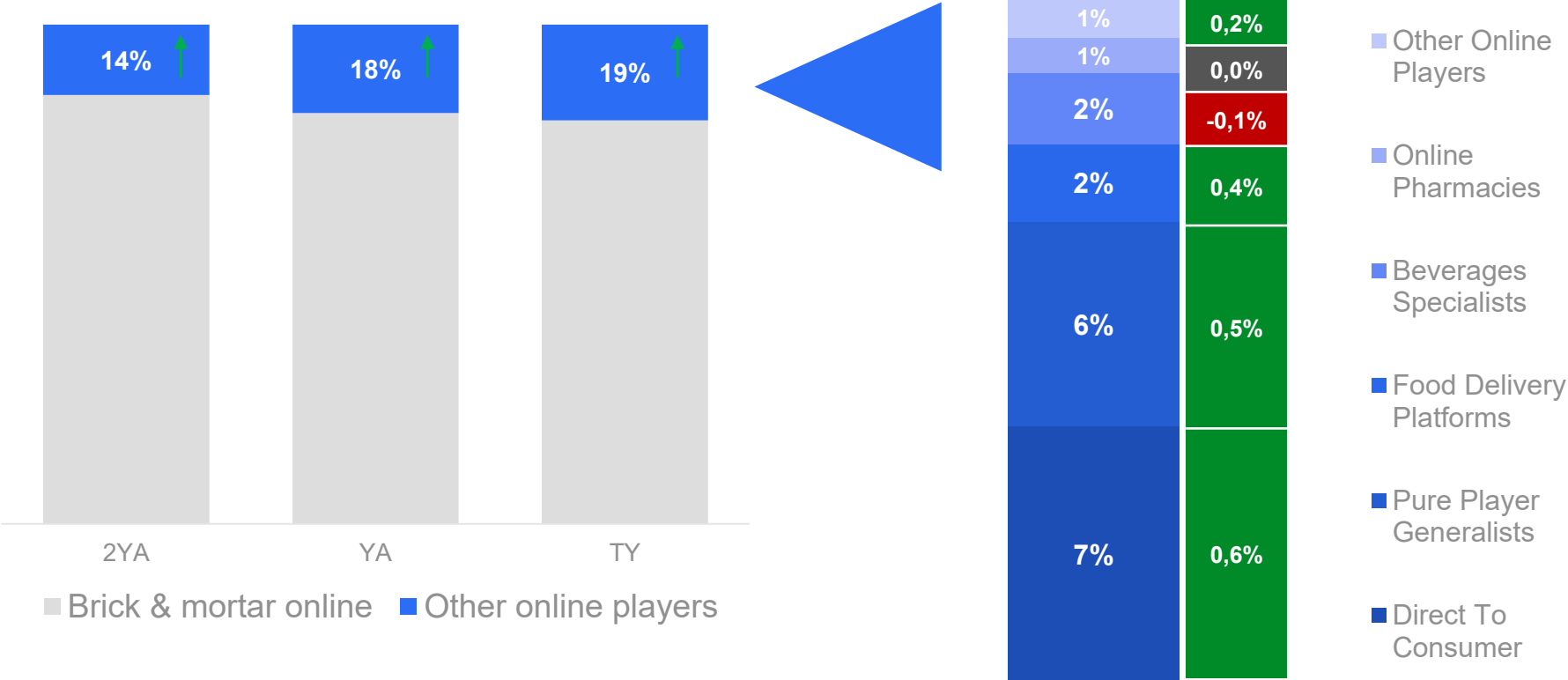
										
Online spend per e-shopper	2 028€	£1 719	1 791€	1 140€	972€	1 475€	1 291€	1 529€	1 006€	1 615 CHF
Number of orders per e-shopper	32.5	43.3	26.8	23.0	21.4	24.6	20.5	24.1	18.5	15.3
Order Value per e-shopper	62€	£40	67€	50€	45€	60€	63€	63€	54€	1 615 CHF

Source: NIQ Digital Purchases. West Europe = UK, DE, FR, IT, ES, NL, BE, AT, IE., CH E-commerce of goods (services excluded). Data ending 31 August 2025



Shifting Priorities: Belgian E-Shoppers Increase Spend on nontraditional groceries channels

Weight of channels in Food & Beverages e-commerce – in value
Food, N-A Beverages & Alcoholic Beverage Ecommerce



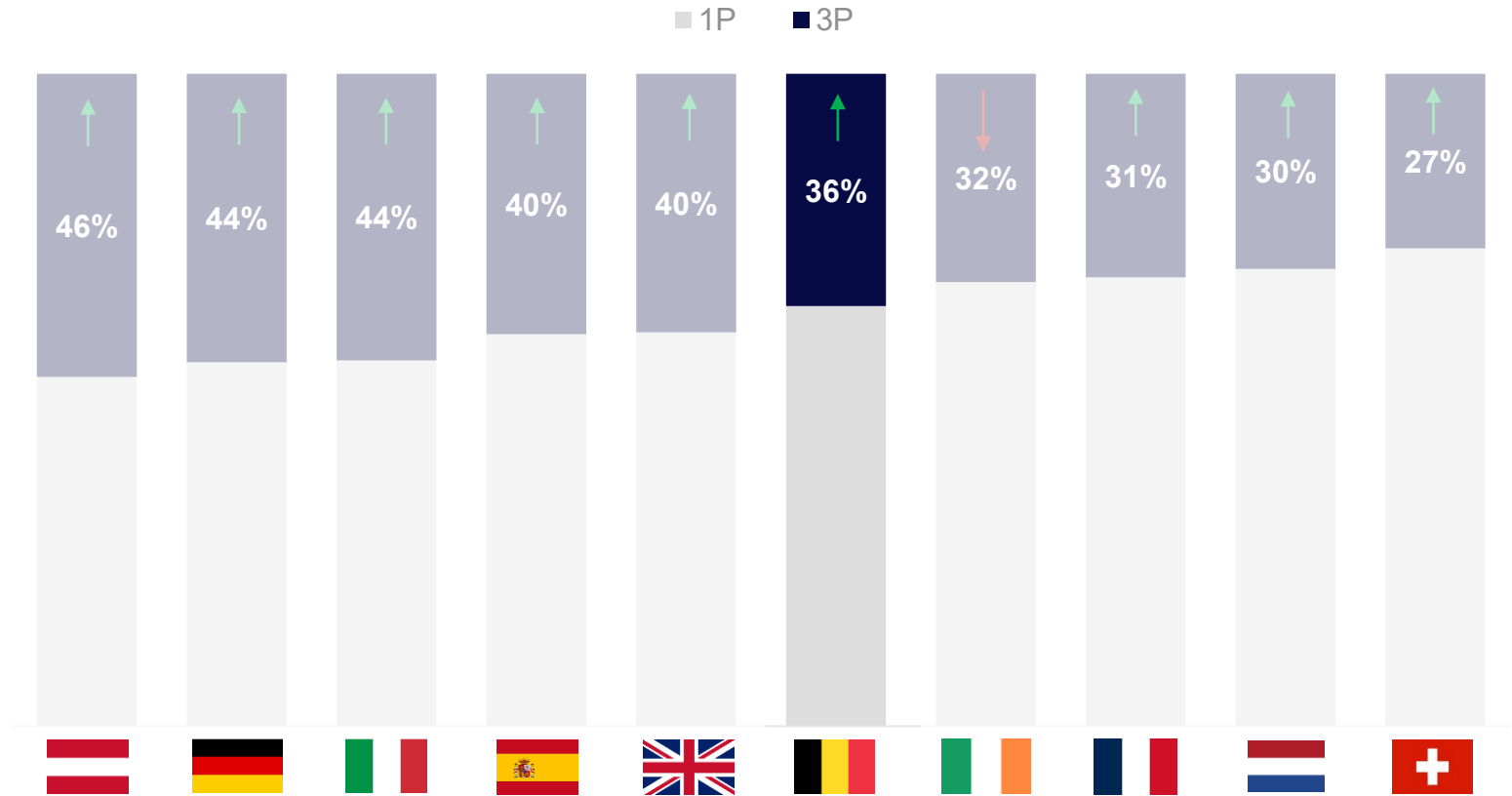
Source: NIQ Digital Purchases. Calibrated FMCG Panel in Belgium. Data ending 31 August 2025



Marketplaces capture 1 out of 3 e-com Euros in Belgium and they keep gaining share in Europe



Value share of marketplace model across Europe
Total E-commerce of goods – Latest MAT 2025



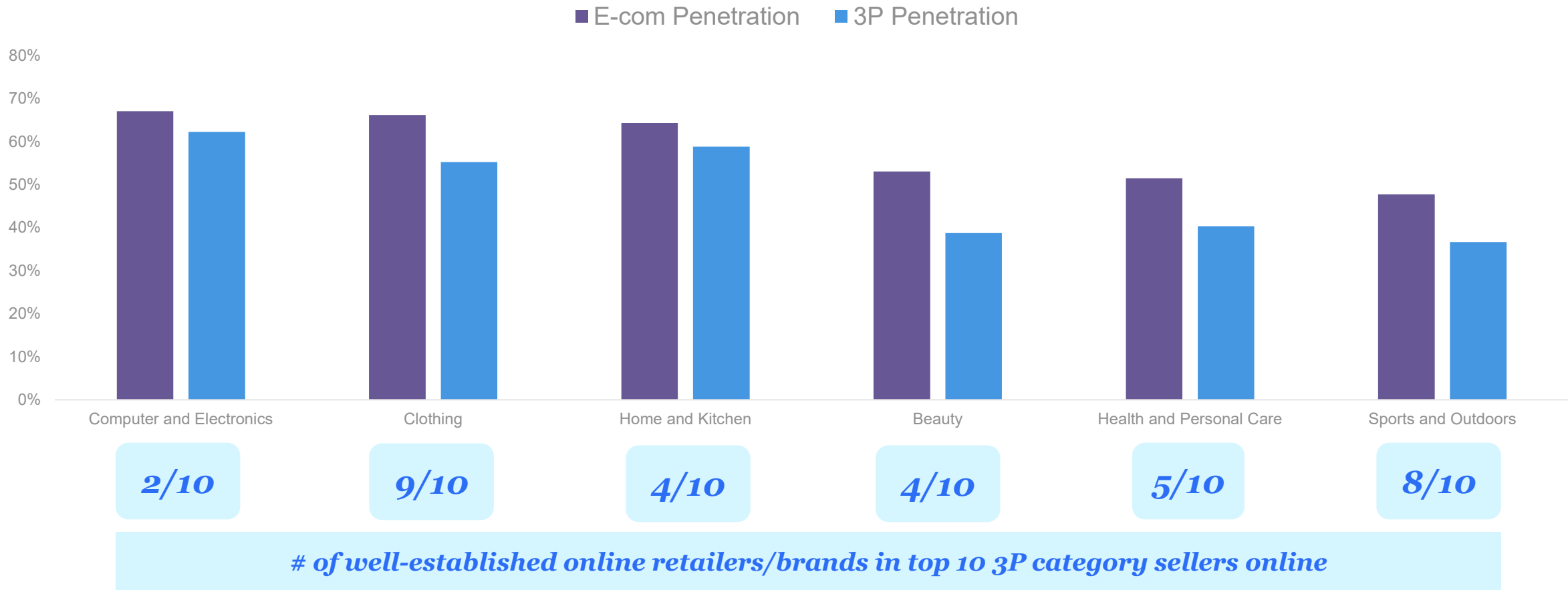
Source: NIQ Digital Purchases consumer panel. Data ending 15 June 2025.

Market Place Surge: Cross border retailers and e-com wholesalers drive the expansion



Online category penetration and category penetration via 3P purchases

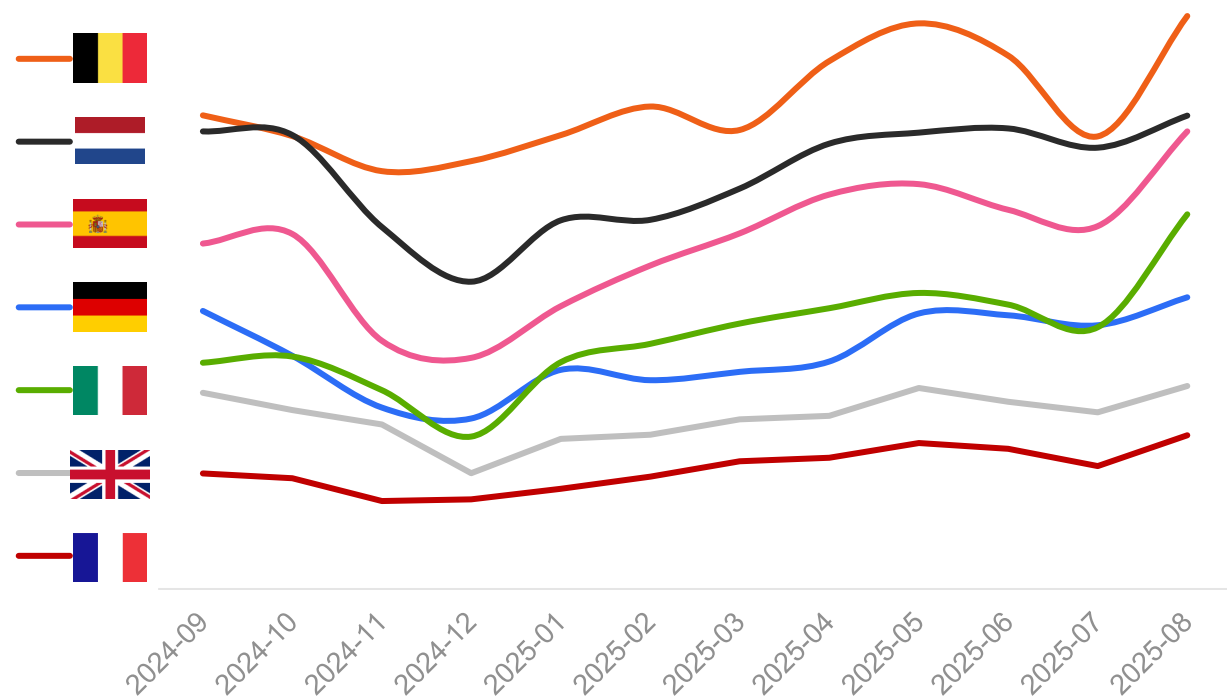
Total Ecommerce Of Goods Shopper Base – MAT 2025



Source: NIQ Digital Purchases consumer panel. Data ending Aug 31 2025.

Temu highest market share is in Belgium and seems to grow again after a slow summer

Monthly value share of Temu in EU7
Total E-commerce of goods – Latest MAT 2025



Source: NIQ Digital Purchases consumer panel. Data ending 31 August 2025.



48% of Temu shoppers are new to buying on the website

44% of Temu shoppers are Gen X (1960-1979)

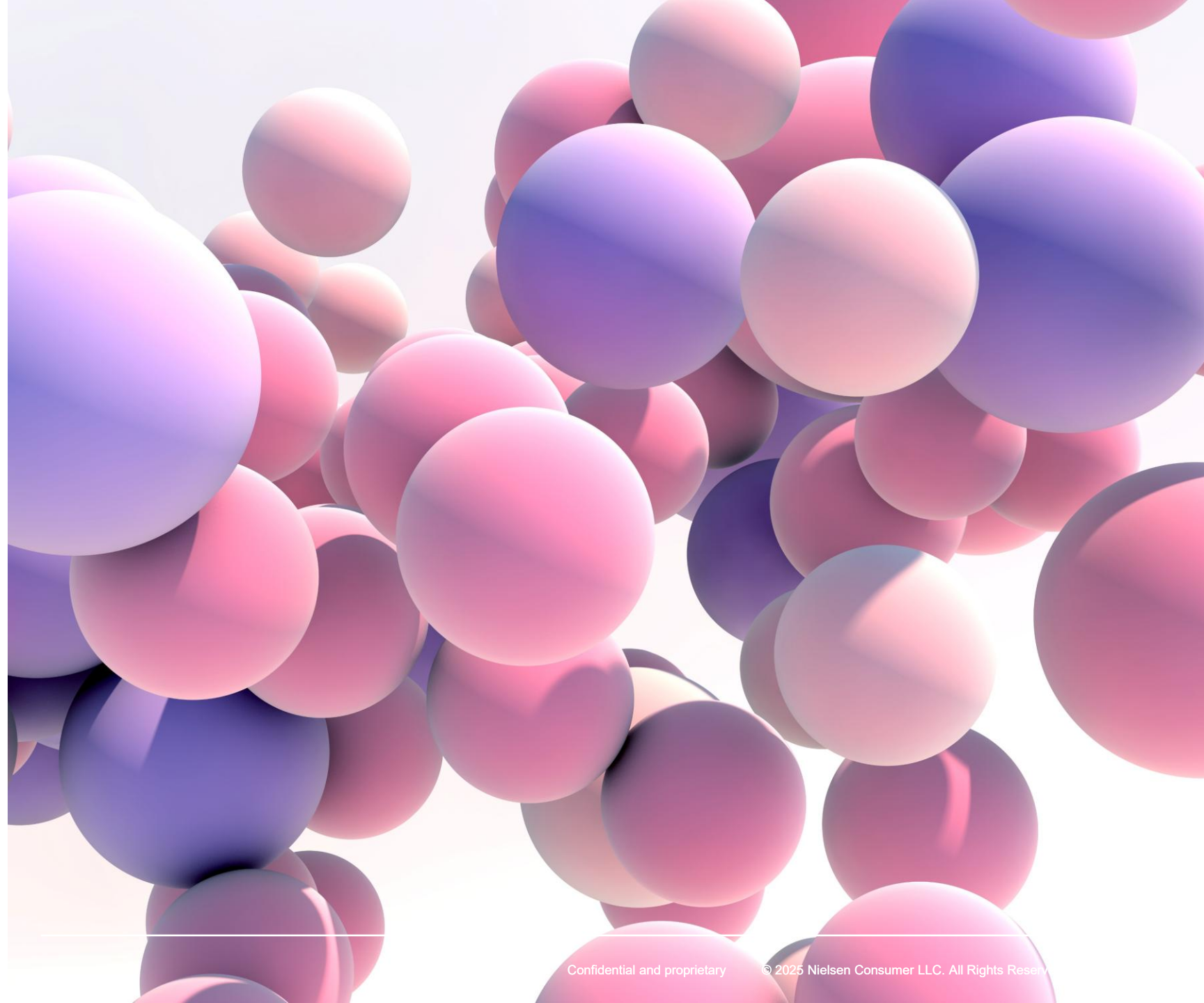
Temu outranks AliExpress in value sales since 2024

From Scroll to Sale: The Rise of Social Commerce and TikTok

Behavioral Insights, TikTok (Shop) Learnings & Crafting your TikTok strategy



NIQ



In case you've missed it... what is TikTok Shop?



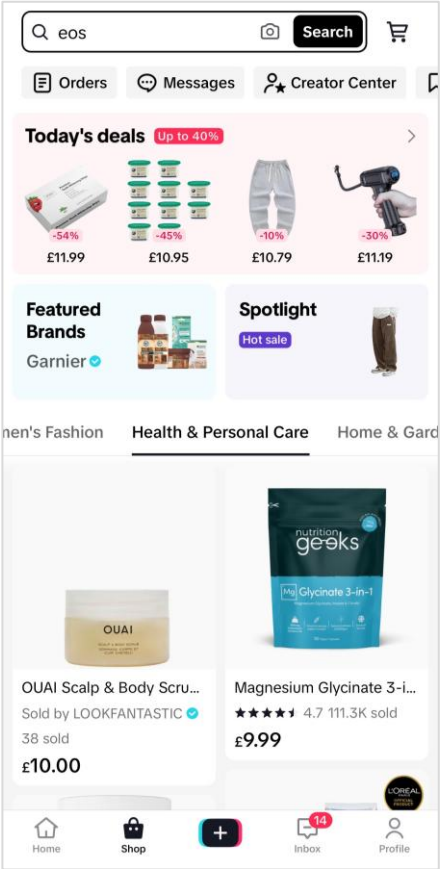
An **integrated e-commerce platform** in the TikTok app.

Users can **search for products** to buy but, most commonly, they are advertised to them by TikTok creators **through short videos**.



NEW

TikTok Shop Landing Page



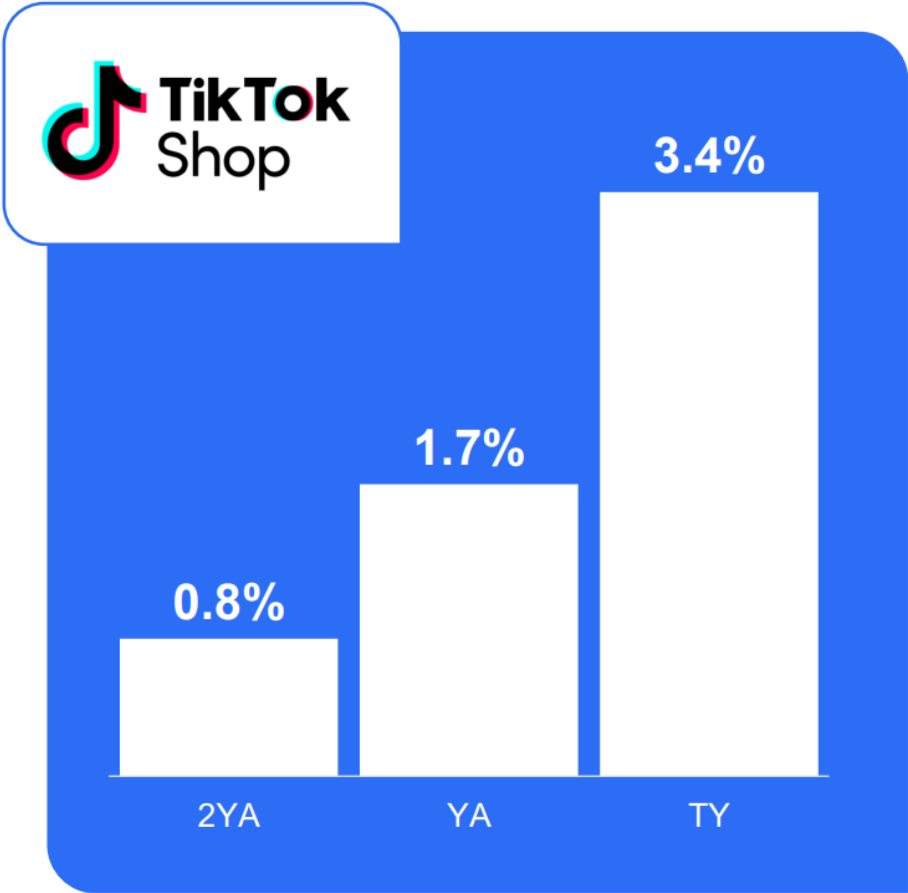
TikTok Shop Live Stream Events

TikTok creator paid videos



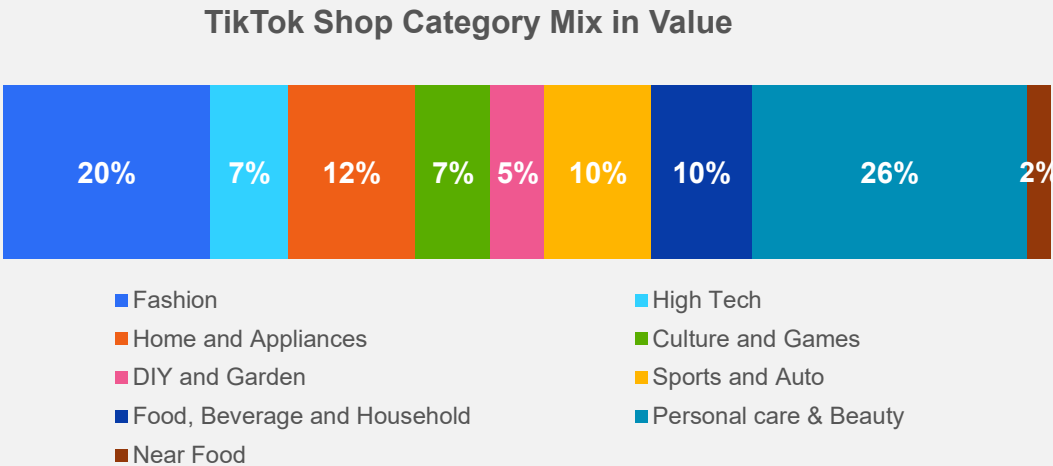
What can we learn from the UK? TikTok has been in its growth stage especially in 2025

TikTok Shop’s Value Market Share | Total Ecommerce | United Kingdom



Source: NIQ Digital Purchases | Total Ecom UK | Value Market Share | TikTok | MAT 3 Aug 2023, 2024 & 2025

UK TikTok shopper transactional profile



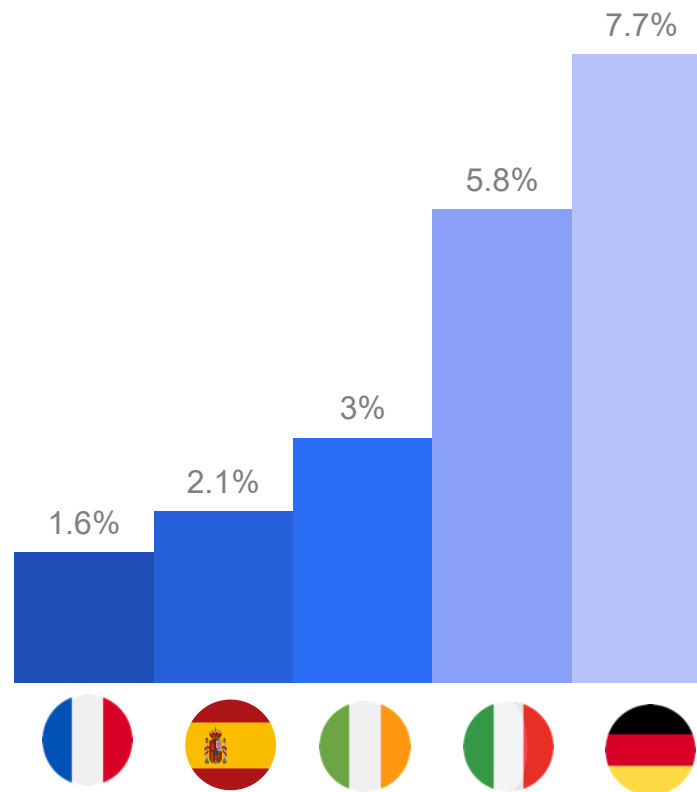
Source: NIQ Digital Purchases | Total Ecom UK | TikTok | MAT 3 Aug 2025

How many e-shoppers did TikTok Shop launches reach?

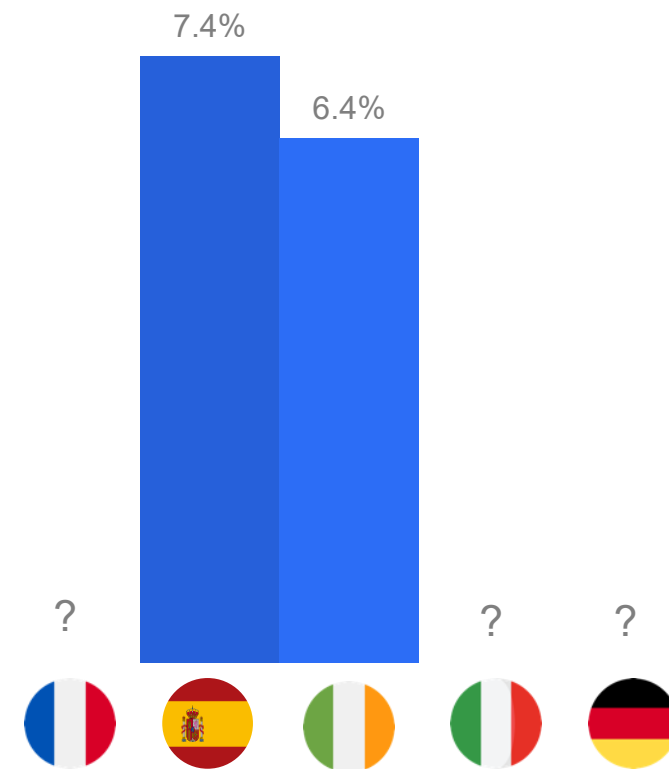


TikTok Shop penetration Total Ecommerce Of Goods

18 weeks after launch



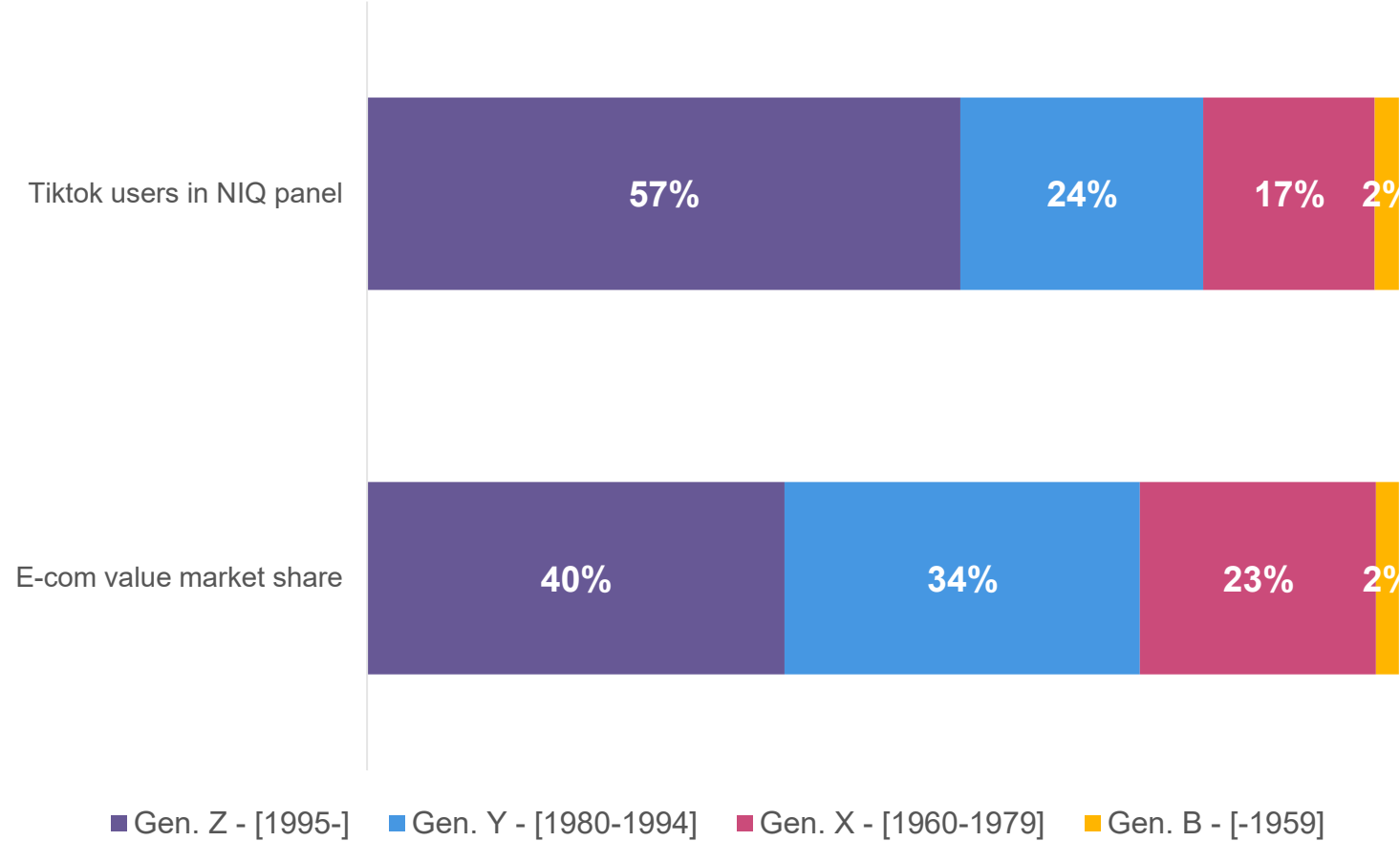
34 weeks after launch



Source: NIQ Digital Purchase e-commerce consumer panel. Data ending 03 August 2025

Generational Divide in TikTok Commerce: Gen Z Drives Engagement, Gen Y & X Drive Revenue

TikTok users generational Mix and purchase power online – MAT 2025



Source: NIQ Digital Purchases, MAT 31 August 2025.. *25,7k users captured in Digital Purchases having a TikTok account and making at least 1 e-commerce purchase

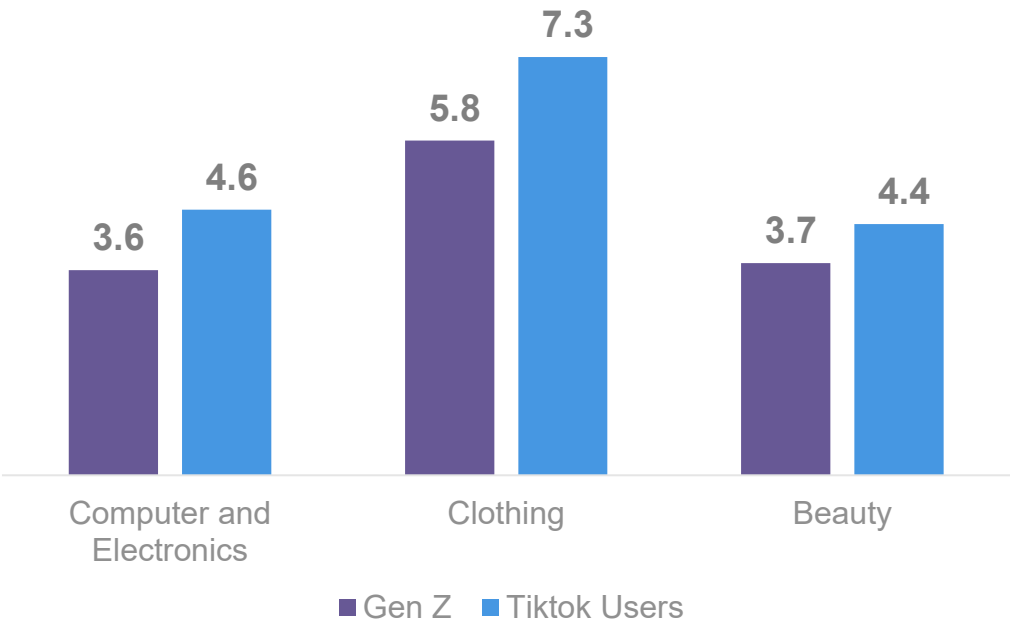


Decoding Digital Spending: TikTok's Frequent Shoppers vs. Gen Z's Big Spenders

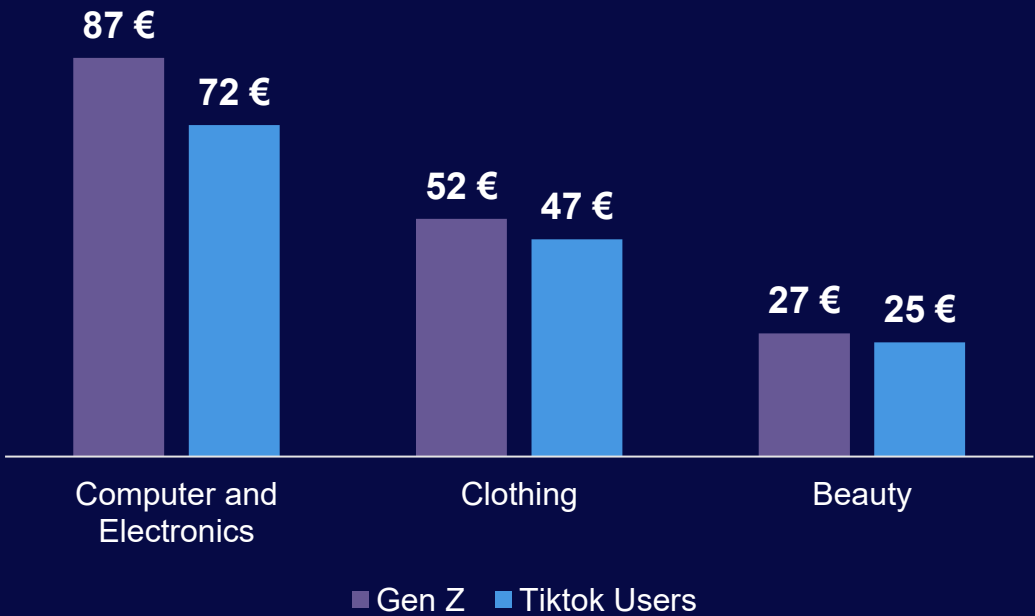
Online purchase metrics for popular TikTok categories in Belgium



Purchase Frequency - Total e-commerce of goods
– MAT 2025 – Belgium



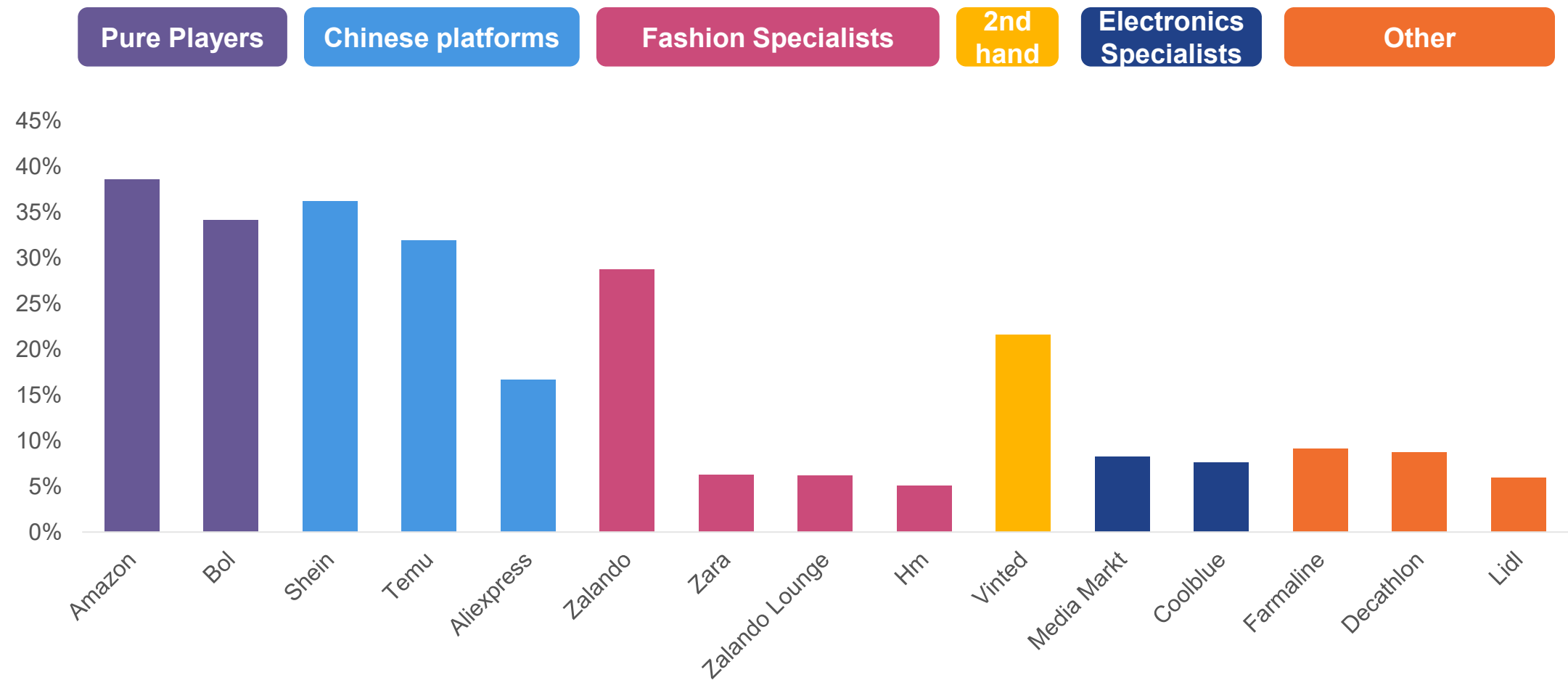
Average Order Value - Total e-commerce of goods
– MAT 2025 – Belgium



Source: NIQ Digital Purchases, MAT 31 August 2025.. *25,7k users captured in Digital Purchases having a TikTok account and making at least 1 e-commerce purchase.

Retail Reach on TikTok: Mapping Belgian Consumer Penetration Across E-Commerce Players

Online Retailer Penetration for Belgian TikTok users – MAT 2025



Source: NIQ Digital Purchases, MAT 31 August 2025.. *25,7k users captured in Digital Purchases having a TikTok account

