

A woman with long dark hair, wearing a bright yellow long-sleeved shirt, is sitting outdoors on a green cushion. She is smiling and looking off to the side while using a laptop. The background shows a modern building with large glass windows and some greenery.

posti

E-Commerce Index

Spring 2025



Content

Business Review.....	3
Posti's E-Commerce Index	5
Current Topics	11
• Recommerce offers new ways to give gifts	12
• Cheaper prices and wider product selections draw customers abroad	13
• circuly: Product subscriptions are growing in Europe	14

Posti's E-Commerce Index tracks the development of e-commerce in Finland. Its goal is to give an overview of the current state and development of online shopping.

The E-Commerce Index is based on continuous measuring in the consumer field, Posti's e-commerce deliveries to consumers, and Posti's analysis. The index includes all parcels we have delivered to homes, parcel lockers, service points, and mailboxes in Finland.



Business review

E-commerce is predicted to grow this year

2024 was a busier year in e-commerce compared to its predecessor, and the same can be said of the Christmas season. Delivery speed and the convenience of shopping online are currently rising themes.

Black Friday starts the race toward the peak season

We've just passed the busiest time for e-commerce, the Christmas season. The number of Posti parcels grew from the previous year: we delivered seven million parcels during the busiest peak-season weeks.

We once again saw how the season-opening Black Friday starts earlier each year. Black Friday has become a race where online stores compete for sales advantage by starting their discounts before others. Parcel volume already started growing on the week before Black Friday. However, as Black Friday landed later in the month, a big portion of orders didn't make their way to recipients until December.

Recommerce growth has no end in sight

The growth of secondhand continues online. We already shared in the previous report that the number of Posti parcels

containing secondhand goods has multiplied by five in a year. The growth is partly explained by price-consciousness, but above all by the changing consumer behavior and the willingness to make more sustainable choices.

We can already say that secondhand is not a temporary craze but instead a permanent phenomenon. New players on the market have been able to grow customer demand. For many, secondhand has also become an option for Christmas gift purchases – and a way to put their own unsuitable gifts to circulation.

Speed and convenience are rising themes

We at Posti regularly meet with Finnish online stores. Speed is a theme that comes up in conversations now more than before. In some industries, companies are already setting their own goals for delivery speed, for example by measuring the portion of next-day deliveries. At Posti, we increased our speed last fall by starting Saturday deliveries.

Ease and convenience are also current themes. Expectations on the e-commerce customer experience are constantly growing. A few years ago, customers didn't mind picking up parcels from slightly further locations, but nowadays they want them as close as possible, as conveniently as possible. The networks for parcel pickup are becoming denser and home deliveries more common.

Expectations on the e-commerce customer experience are constantly growing.

At Posti, we launched Small Parcel To Door as a new delivery method for convenience: it gives customers an affordable way to receive their parcels at home, either through the mail slot or behind their door.

2025 is a year of growth in e-commerce

There have been a few downward years on the market, but in 2024, Posti parcel volumes turned back toward growth. We believe that the same development will continue, and 2025 will be a year of growth in e-commerce.

I wish you insightful moments with this report!

Kaj Kulp

Vice President, eCommerce Services



E-Commerce Index



E-Commerce Index tracks how online shopping develops

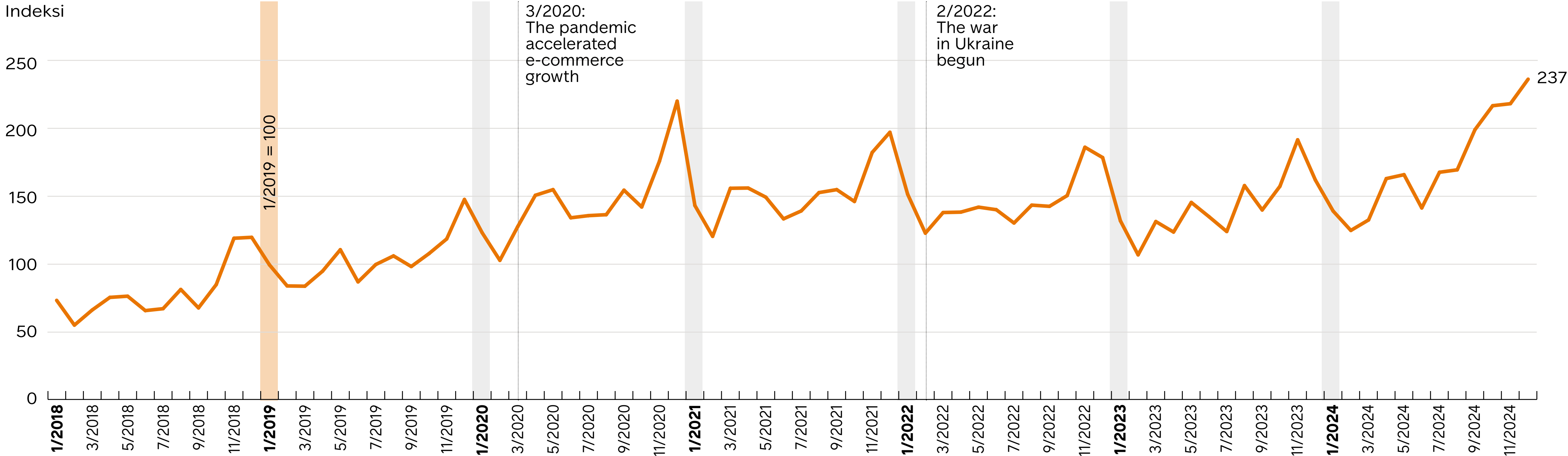
Posti's E-Commerce Index tracks e-commerce in Finland. Its goal is to give an overview of the current state and development of online shopping.

The E-Commerce Index is based on continuous measuring* in the consumer field, Posti's e-commerce deliveries to consumers, and Posti's analysis. The index includes all parcels we have delivered to homes, parcel lockers, service points, and mailboxes in Finland.

*Continuous measuring in the consumer field covers approximately 1,500 respondents each month. Data is collected through an online panel.

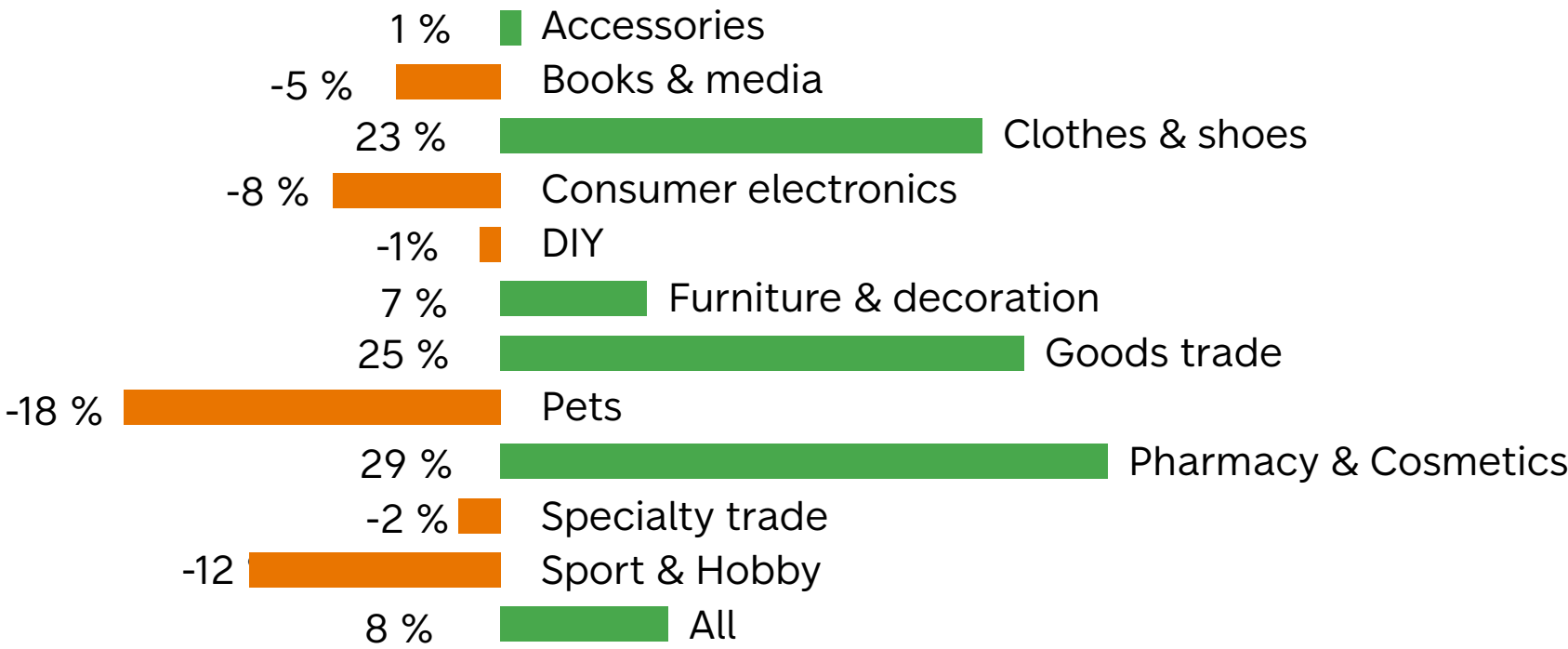
The E-Commerce Index covers development from the beginning of 2018 to December 2024. E-commerce parcel volume was slightly higher last year compared to 2023.

Overall sales development from January 2018 to December 2024

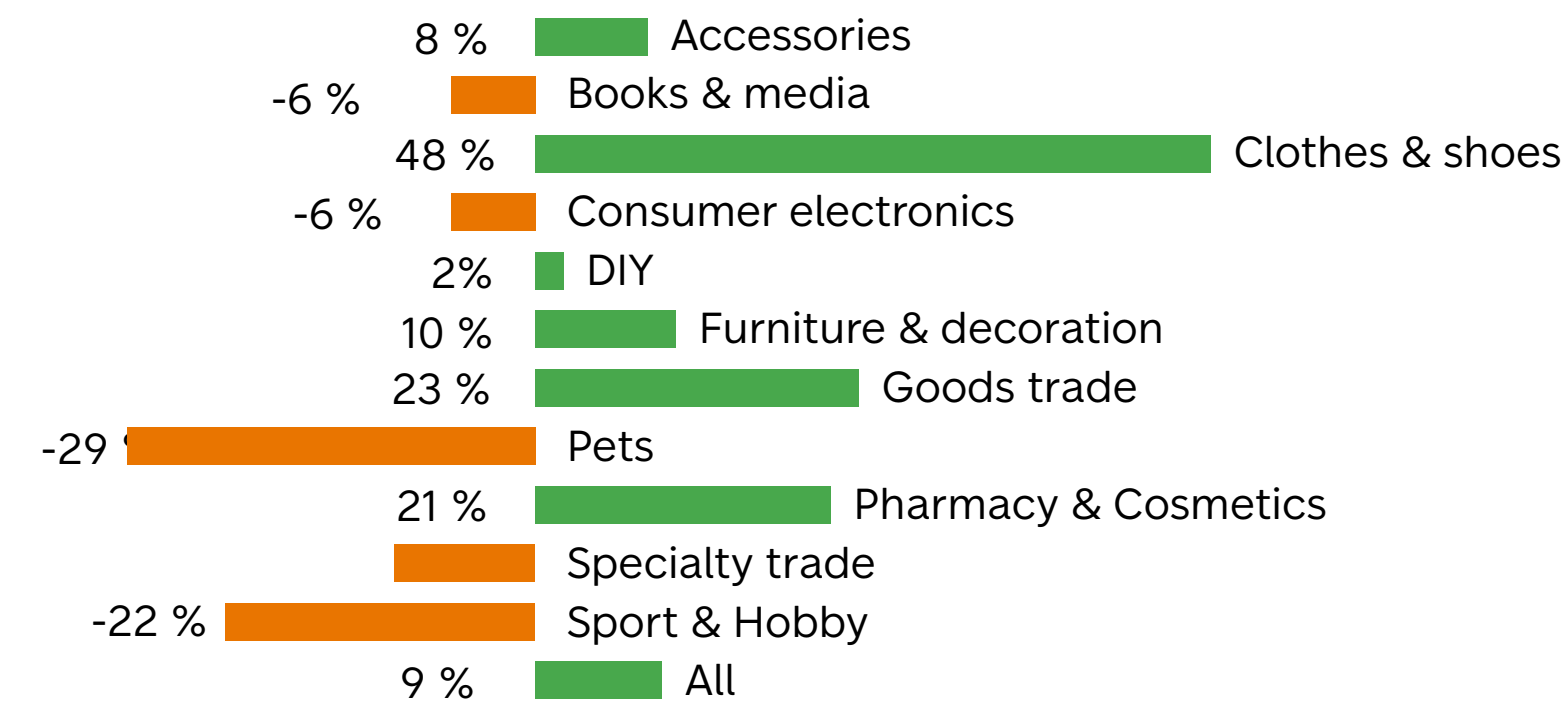


In 2024, Posti parcel volume grew especially in pharmacy and cosmetics, goods trade, and clothing and shoes. Development is compared to 2023.

Product category development 2024 vs. 2023

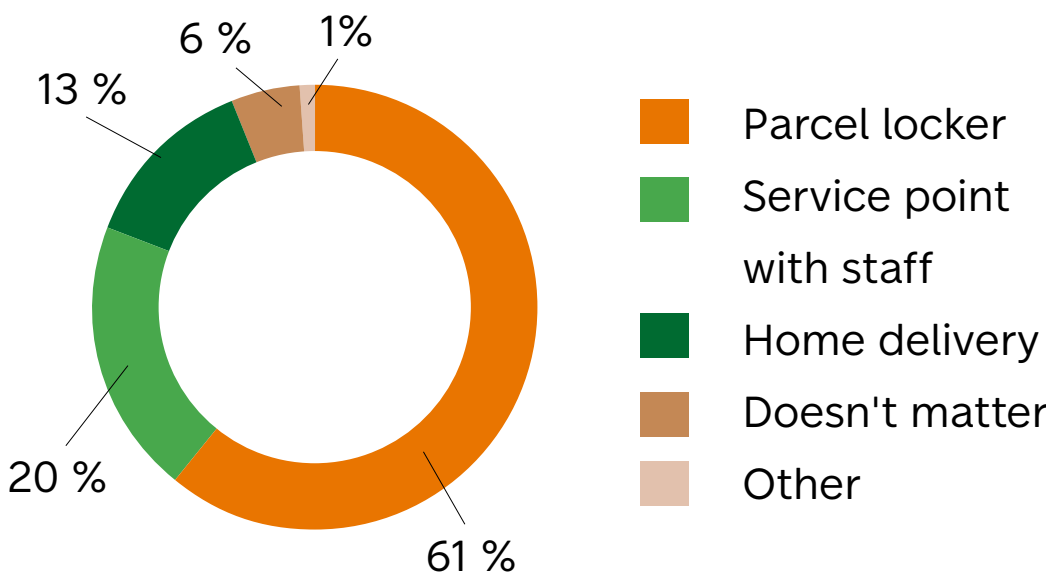


Product category development peak season 2024 vs. 2023



The results of an e-commerce survey supplement the E-Commerce Index's perspective. The survey was carried out on consumer community platform Posti testaamo during January 7-14, 2025. Respondents are Posti customers. The number of responses was 621.

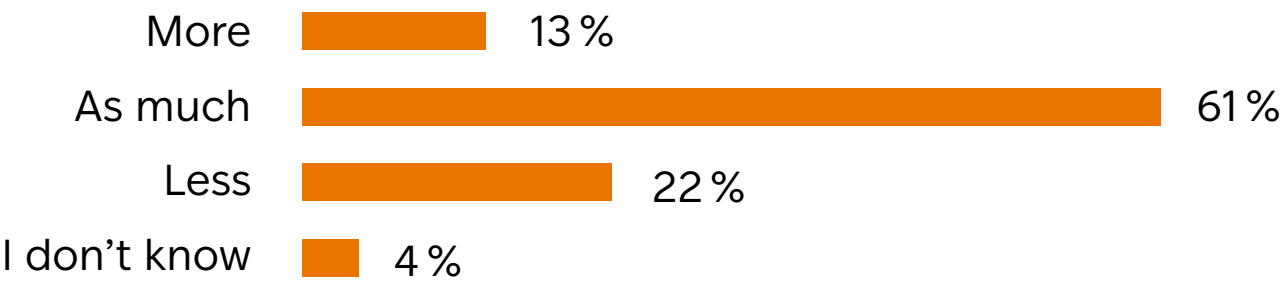
How do you prefer to receive your parcel?



Most important criteria in choosing the parcel delivery company

Delivery to the location I want	75 %
Affordable price	64 %
I can constantly track the parcel	42 %
Fast delivery time	32 %
Good customer service (e.g. if issues arise)	18 %
Delivery at a time I want	11 %
Familiar delivery company	10 %
Emission- or carbon-free delivery	6 %

Do you currently order more, less or as much online than you did a year ago?



20 %
have at least occasionally
ordered something online
with quick delivery (delivery
within a few hours).





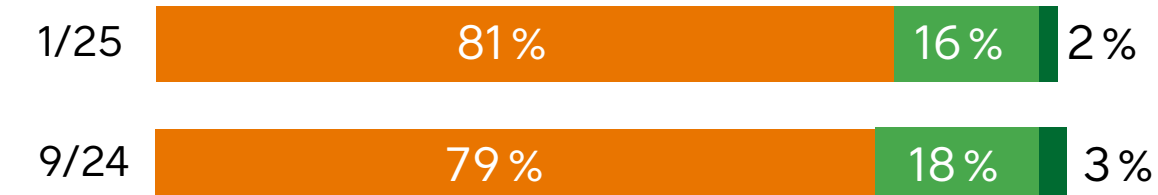
I primarily buy from domestic online stores instead of international ones



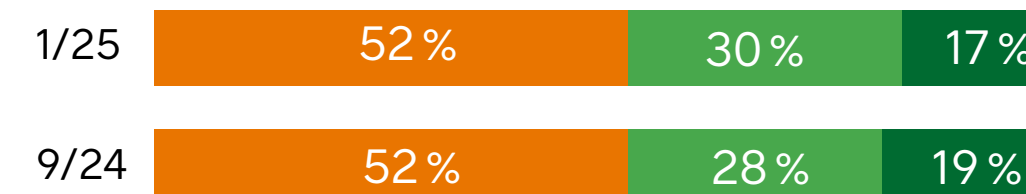
- Describes me very well
- Somewhat describes me
- Describes me occasionally at most
- Does not describe me at all

How often do you order from domestic and international online stores?

Domestic online stores



International online stores



- Regularly or occasionally
- Rarely
- Never

"I live in a sparsely populated area. I get what I need from online stores."

– E-commerce survey respondent

"I want to decrease overconsumption and emissions that burden the environment. I mainly buy secondhand."

– E-commerce survey respondent

"Good offers and free home deliveries motivate me."

– E-commerce survey respondent

"Everything is so expensive nowadays and there's no money for anything but necessary purchases."

– E-commerce survey respondent

"Ordering online is an easy habit for a person with reduced mobility."

– E-commerce survey respondent

Current Topics



Cheaper prices and wider product selections draw customers abroad

International e-commerce is a topic of conversation in Finland. Based on Posti's January customer survey, consumers choose to order abroad because prices are lower, selections are wider, and the product they want is not available in Finland.

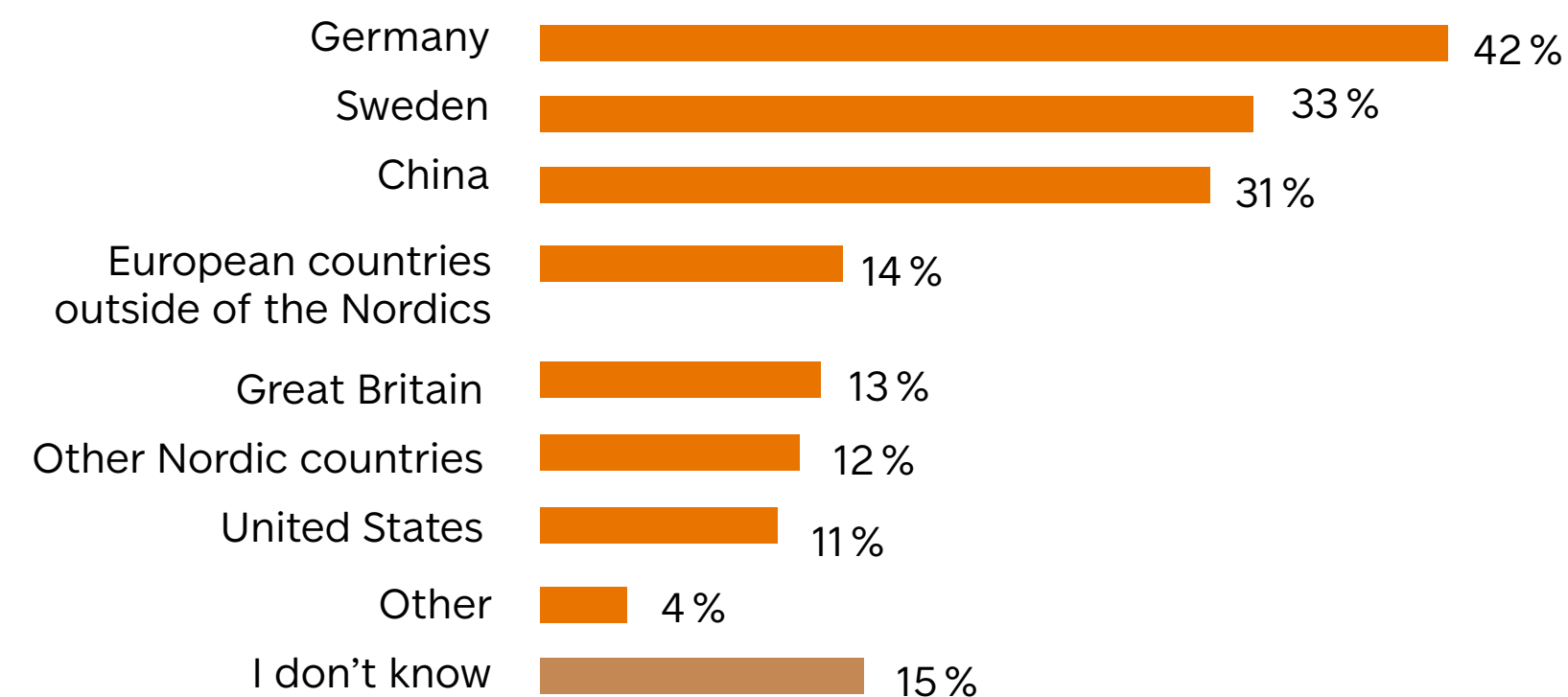
International orders are most often placed to other European countries. Respondents say they order most from Germany and Sweden. Included in the top three countries is China.

"Ordering from abroad has been growing, and it seems that the growth will continue. Around one third of parcels delivered by Posti currently come from outside of Finland. We at Posti want to also help Finnish online stores expand

to new countries. For example, the Baltics are a growing market that could offer potential nearby Finland," says Account Director **Jukka Vasama**.

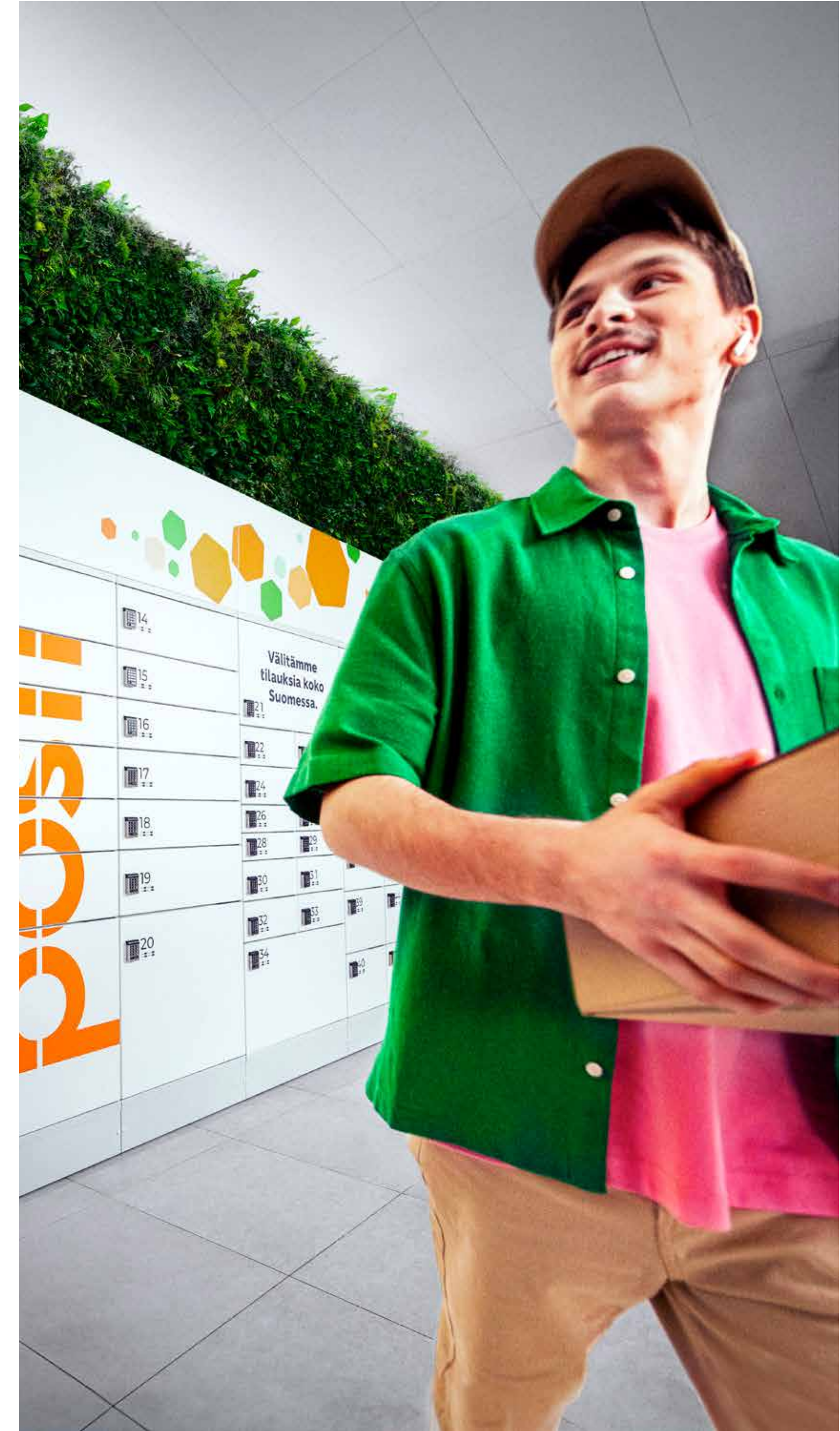


When ordering from abroad, which countries do you most often order from?



Top five reasons to order from international online stores

1. Cheaper prices	62 %
2. I can't get the products I want from Finland	53 %
3. Wider selection	50 %
4. Better deals or offers	34 %
5. I can't get the brands I want from Finland	13 %



Recommerce offers new ways to give gifts

Recommerce continues its growth. In Posti's customer survey, around 12% of respondents are currently buying and selling more used items online than they did a year ago. The number of Posti parcels containing secondhand goods has multiplied by five in a year.

Recommerce also offers new opportunities for gift givers and receivers. 52 % of respondents have at least occasionally purchased used items as Christmas gifts. 40 % have at some point resold a gift they've been given.

"Selling and buying used items has recently become easier and more e-commerce-like, which has made it accessible to more people and boosted its growth. We at Posti ensure that secondhand items can be delivered in an environmentally friendly manner, even in long distances, making the selection wider for buyers and expanding the potential buyer base for sellers," says **Elina Rosenlund** who oversees consumer-to-consumer sending at Posti.



I would like to buy more used gifts for my loved ones in the future

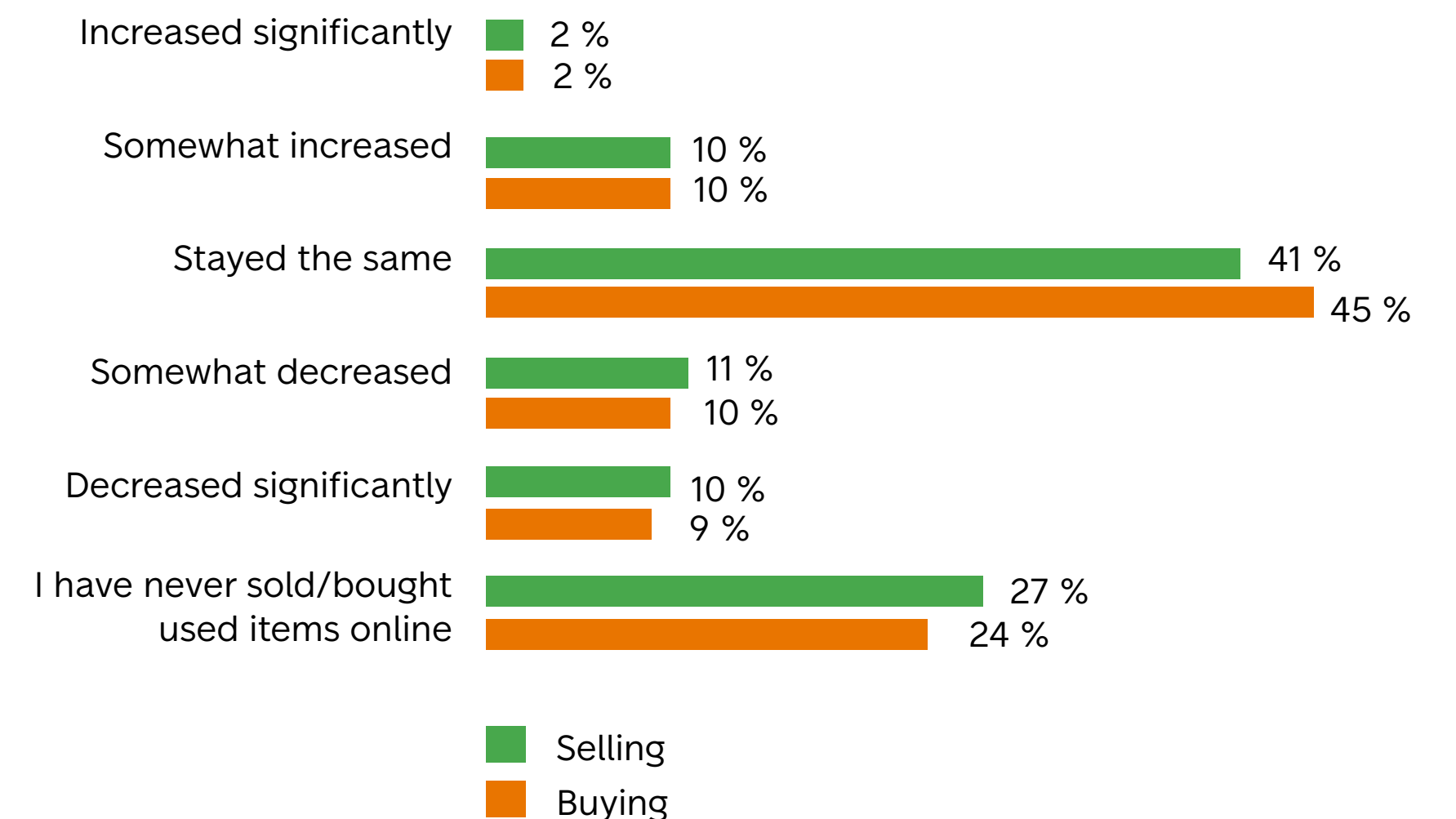


I have at some point resold gifts I have been given



- Describes me
- Describes me occasionally at most
- Does not describe me at all
- I don't know

Has selling or buying used items online changed for you, when compared to a year ago?



circuly: Product subscriptions are growing in Europe

Circular economy is on the rise and changing the way we consume products. Europeans are now increasingly drawn to rentals and subscriptions as more sustainable alternatives to ownership. German software-as-a-service company circuly helps businesses across five continents access the growing market.

Renting instead of owning is becoming more popular

If you have a product that is valuable, high-quality, and only needed for a certain time, congratulations: you may have potential to expand your business into rentals or product subscriptions.

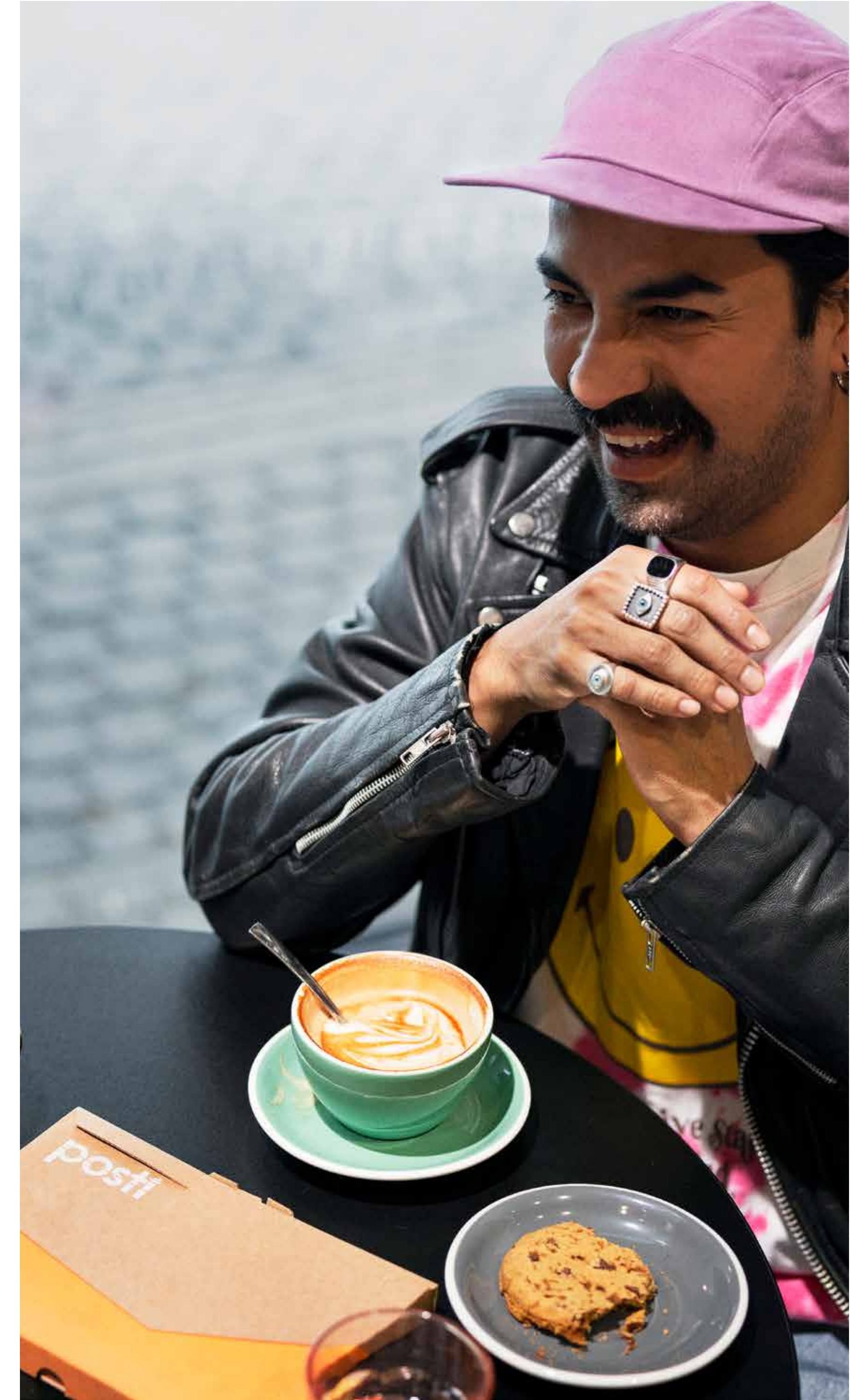
Offering access to products instead of selling them is a growing phenomenon. The global market for product subscriptions is predicted to be worth over €700 billion in 2025. Common product categories include baby goods, electronics, medical equipment, and bikes.

“Many companies are starting to see the value in going circular. Product subscriptions are a great thing to pitch, because they combine sustainability and profitability. You save resources and costs by producing just one product for four customers instead of the usual four. The clients we work with are currently growing their business on average by 400% per year,” circuly Enterprise Account Manager **Michael Schmidt** shares.



Earning more per product and reaching new customers

Going from one-time sales to renting your products is a big change for any company. Key areas where partners like circuly and Posti can help are technology and logistics. circuly offers companies a digital solution for managing subscriptions and serving customers seamlessly in their online store. Logistics partners like Posti help manage product flows and refurbishments.



“There are a lot of processes that you need to create. Instead of selling a product and being done with it, you now have a product that puts you in continual interaction with the customer – and at any point, the product may come back to you,” circuly Marketing and Content Manager **Garima Singh** points out.



Benefits include earning more per product over time, having recurring revenue you can plan on, and forming long-term relationships with customers.

Circular economy can also help attain new customers. When companies launch rental or subscription models, circuly's experience shows that roughly 5% of users come from their existing customer base – meaning 95% are new to the company. In fact, they can be a handy way for some companies to grow their market share and reach new target groups, especially younger generations.

circuly's tips for entering the subscription or rental market

1. Keep an eye on the market. Is there a competitor offering something similar in your market or elsewhere? Don't wait for them to step into your territory – take the lead. Establish your presence and secure your position before competitors make their move.
2. Start small and lean. All you really need to get going is a payment provider that can process recurring payments, and an online store connected to a shop system.
3. Communicate about the service and its value to your customers actively and make sure they feel in control. There's plenty of subscription fatigue going on and you don't want your customers to feel like they'll be trapped if they decide to subscribe.

Ready-made solution for Finnish online stores

Posti and circuly offer companies in Finland a turnkey solution that includes the digital and logistics services needed to go circular. If you would like to know more about how we can help your business grow, you can reach out on posti.fi/sales.

Benefits include earning more per product, having recurring revenue, and forming long-term relationships with customers.

posti