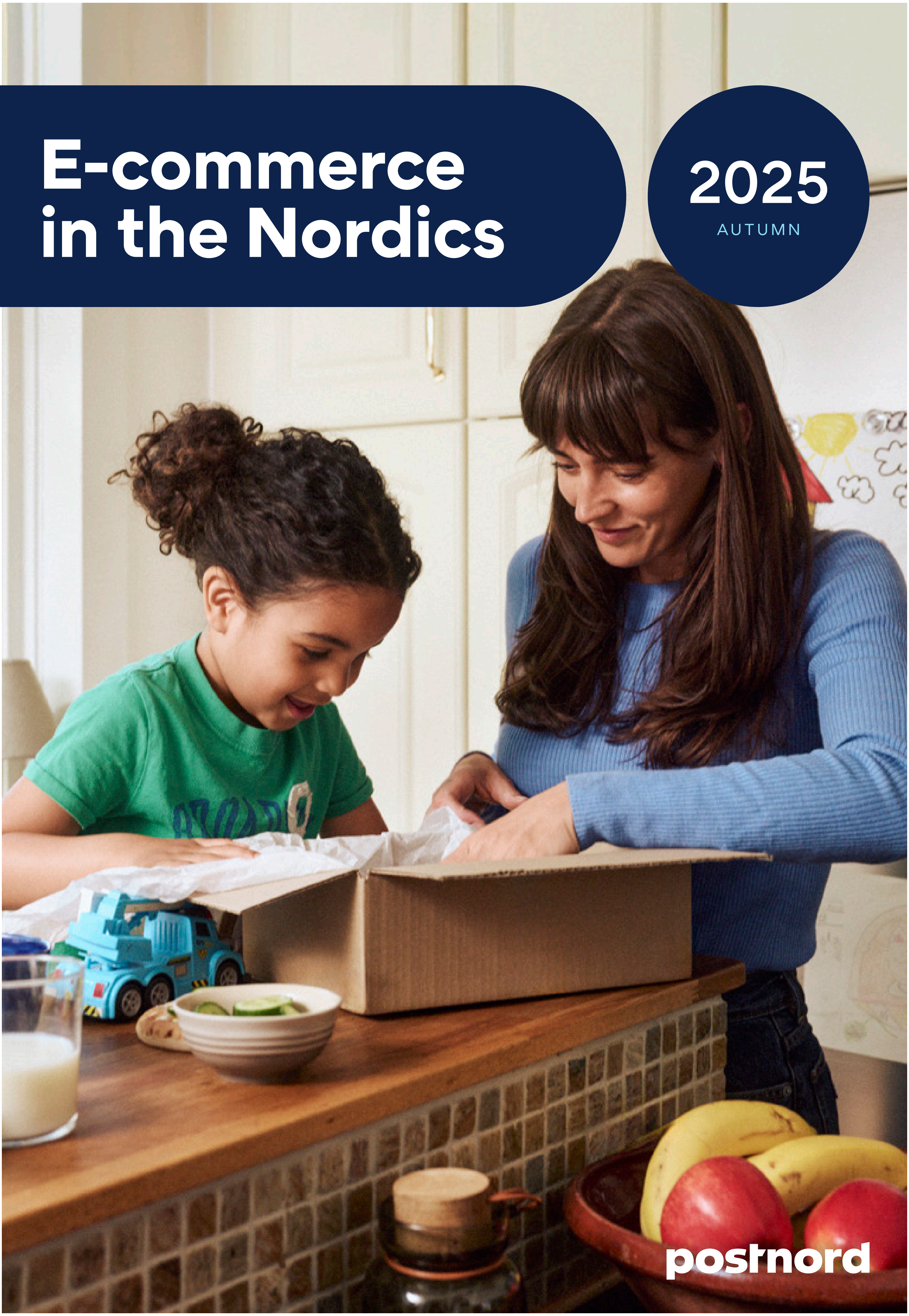
E-commerce in the Nordics

2025
AUTUMN



postnord

Welcome!

We are pleased to present the autumn edition of E-commerce in the Nordics. This report offers a comprehensive overview of the latest trends shaping online shopping across the region – from global e-commerce and checkout experiences to omni-channel behavior and circular consumption.

Nordic households continue to navigate global uncertainty with caution. While inflation has stabilized and interest rates have eased, consumers are still careful with their spending. Retail is gradually recovering, and e-commerce remains the strongest growth driver – driven by convenience, competitive pricing, and broad product availability.

This year, cross-border shopping has increased, with China remaining the top supplier of goods. However, neighboring Nordic countries are gaining ground, especially Sweden and Denmark, which are increasingly associated with lower prices and diverse product selection. Norway stands out for its inspiring online stores and accessible customer service.

Sustainability continues to influence consumer choices. Nearly 7 out of 10 Nordic consumers have engaged in second-hand shopping, with younger shoppers driving growth. Platforms like Tradera, Vinted, and Facebook Marketplace are making circular consumption more accessible, though ease of use and product availability remain key to further adoption.

This edition also explores how checkout is evolving across the Nordics. We look at delivery preferences, consumer expectations, and the role of AI in shaping future shopping experiences – highlighting both shared patterns and national differences.

We hope this report provides useful insights into the evolving Nordic e-commerce landscape. At PostNord, we continue to support retailers and consumers with reliable, fast, and sustainable customer solutions and delivery options.

Kind regards,

Annemarie Gardshol
President and Group CEO, PostNord

Contents

About the report

E-commerce in the Nordics is a report published twice a year by PostNord in collaboration with HUI Research. It provides insights into key developments and consumer trends in Nordic e-commerce. The report is intended for businesses, analysts, and decision-makers seeking to understand the dynamics of e-commerce across Sweden, Denmark, Finland, and Norway.

The data presented in this report is based on consumer surveys conducted in Sweden, Denmark, Finland, and Norway. The surveys were carried out in August and September 2025, with a total of 4 000 respondents aged 18–79, evenly distributed across Sweden, Denmark, Finland, and Norway with 1 000 respondents per country.

Unless otherwise stated, all comparisons in the report refer to the same period the previous year.

Nordic households navigate uncertainty with caution

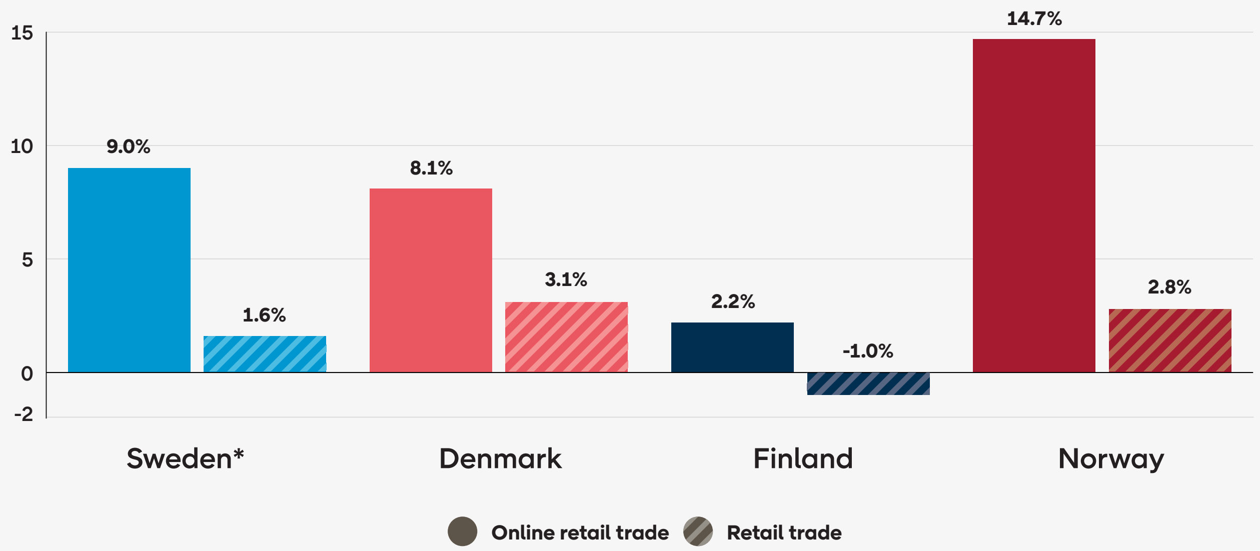
Global uncertainty remains high, with both conflicts and trade tensions affecting the Nordic countries' growth negatively. Higher tariffs have increased the cost of both imports and exports[1]. This has led to a growing worry in the Nordic region, that relies strongly on open trade.

However, household purchasing power has improved somewhat as inflation has stabilized and interest rates have eased, supporting real wage growth. Still, consumers remain cautious and prefer saving over consumption.[1] Household spending is key to lifting the Nordic economies, and while confidence is slowly improving, it remains well below historical norms.

Overall, retail sales show a gradual recovery. All Nordic countries except Finland recorded positive retail growth in Q2 2025, with online retail as the main driver. E-commerce continues to outperform physical retail, boosted by consumers' demand for convenience, competitive pricing, and broader product availability.

The Nordic economies are expected to increase in 2026 and 2027, partly because households will have more money to spend as purchasing power improves.[2] This provides extra room for consumption that will further boost retail trade.

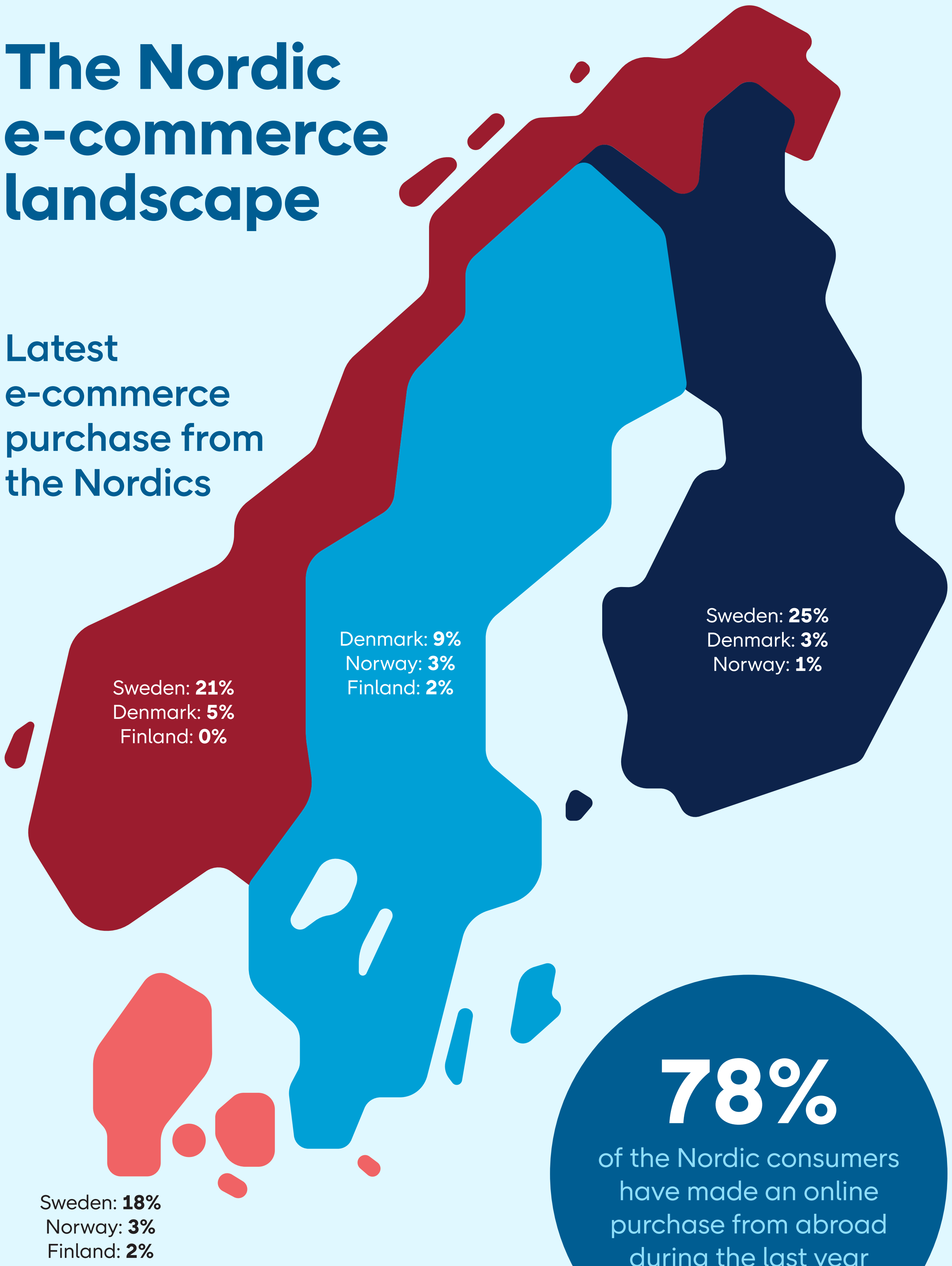
Retail trade growth in 2025 Q2 compared to the same period last year



Source: Eurostat
*E-barometern Q2 2025, HUI Research
1. Detaljhandelns konjunkturrapport Q3 2025, HUI
2. SEB Nordic Economic Outlook, Aug 2025
Source: Eurostat (2025-09-12) calendar adjusted, index 2021=100. Volume of sales

The Nordic e-commerce landscape

Latest e-commerce purchase from the Nordics



78%

of the Nordic consumers have made an online purchase from abroad during the last year (74% 2024)

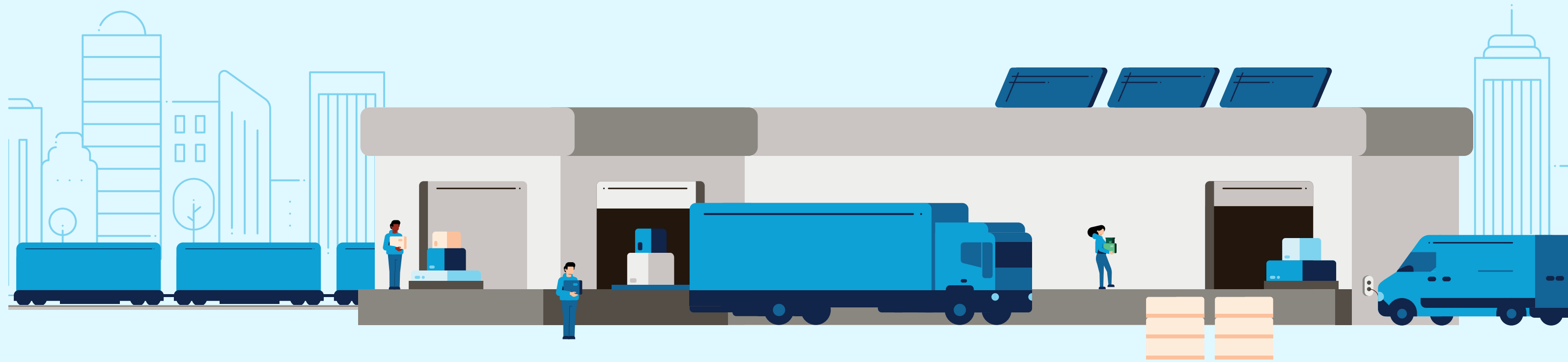
Overview: the Nordics

Nordic e-commerce behavior

83 percent of Nordic consumers have shopped online during the last 30 days. Furthermore, shopping abroad has become more popular over the past year. About 8 out of 10 Nordic consumers have made a purchase online from abroad in 2025, an increase of 4 percentage points compared to 2024. China remains the most popular country to shop from for the Nordic consumers. That is reflected on the consumers' reasons for shopping from abroad instead of domestically. More than 50 percent of those who have shopped from abroad state that lower price is the main reason for purchasing abroad.

In contrast to the increase in international purchases, at least when considering the sustainability factor, a majority of the Nordic consumers also engage in the second-hand market. Nearly 7 out of 10 Nordic consumers have bought or sold second-hand items during the past three months. This behavior is even more pronounced amongst the youngest consumers, those aged 18–29, where the figure reaches closely to 9 out of 10. In other words, the younger consumers drive the second-hand market online.

Have shopped online during the last 30 days	**83%**
Most common reason to shop online instead of in physical store: lower prices	**22%**
Were satisfied with the check out-experience during their latest online purchase	**87%**
Have made an online purchase from abroad during the last year	**78%**
Most popular country for latest purchase from abroad: China	**30%**
Have engaged in the second-hand market during the last three months	**66%**



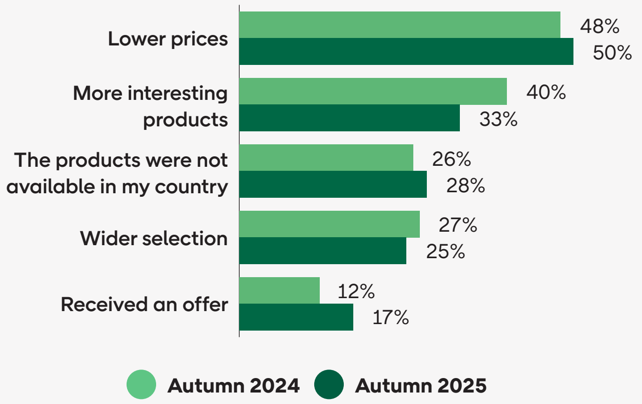
The Nordic e-commerce landscape

Sweden

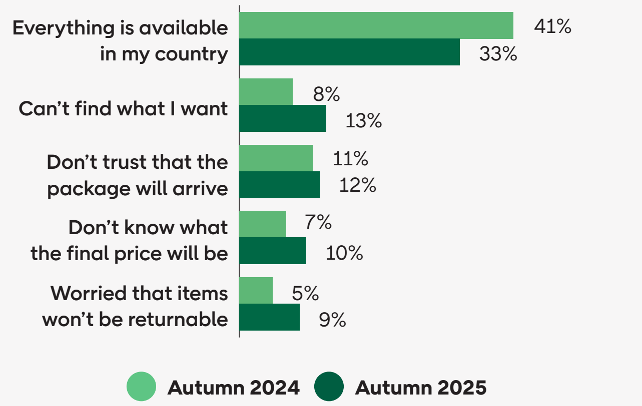
Top countries for latest purchase

	Autumn 2024	**Autumn 2025**
1. China	30%	**33%**
2. Germany	17%	**16%**
3. Denmark	10%	**9%**

Reasons for shopping from abroad*



Reasons for not shopping from abroad**



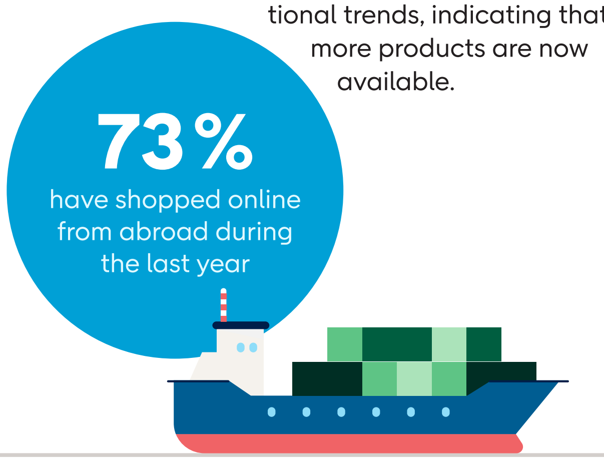
Global e-commerce

Online shopping from abroad is becoming more frequent among Swedes. 73 percent have shopped online from abroad during the past year, compared to 65 percent Autumn 2024. More consumers have shopped from abroad as the Swedish currency has strengthened during the year.

China remains the most popular country to shop from, gaining ground on Germany and Denmark. Swedish consumers mainly relate low prices and a wider range of interesting products with online marketplaces in China and Germany.

The amount of people purchasing from abroad due to an offer from a foreign retailer has increased from 12 to 17 percent since 2024. Large foreign retailers such as Temu and Shein have shifted parts of their marketing budgets from the US to Europe among other regions due to US tariff pressures on China. Advertising investments have increased in France and the UK[1], a trend that may also have affected Sweden.

The most common reason why consumers do not shop from abroad is that everything is available domestically. However, this reason is cited less often than a year ago. Sweden is the largest and the most mature e-commerce market in the Nordics, thereby Swedish retailers might be quicker to adapt to international trends, indicating that more products are now available.

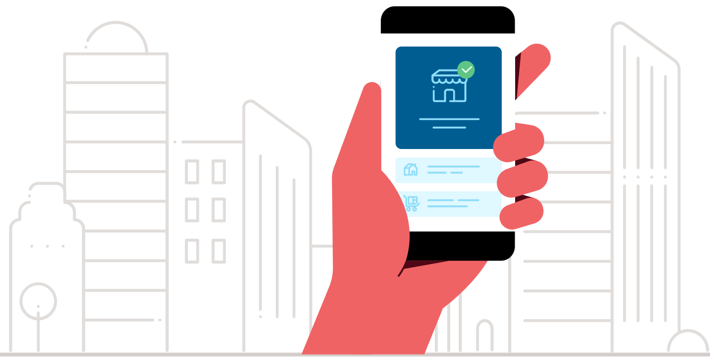


Checkout

Swedish consumers value a checkout experience that is convenient, transparent, and flexible. Satisfaction is primarily driven by the ability to choose a preferred payment method and by having clear, upfront information about delivery.

When it comes to the payment process, it is especially important to the oldest consumers, both regarding availability and security. While younger consumers also value secure payment options and express a need for safer payment options more than other ages, it ranks relatively low compared to other factors they prioritize. In general, the Swedish consumers seem to find the payment processes secure.

Many consumers express a desire for online retailers to offer free delivery and the option to check out without creating an account. While these elements are not essential for a frictionless checkout, they represent opportunities for retailers to develop the customer experience. However, guest checkout, poses a dilemma for retailers; it reduces friction for the consumer but limits the retailer's ability to collect valuable customer data used in, for example, personalized marketing.

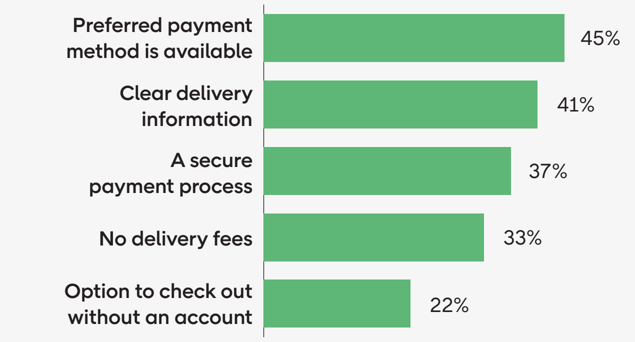


Recent checkout experience

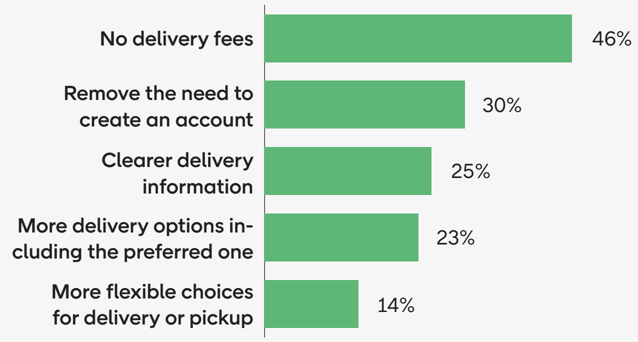
86%

were satisfied with the checkout experience during their latest online purchase

Top factors for a smooth online checkout



What shoppers want improved in online checkout

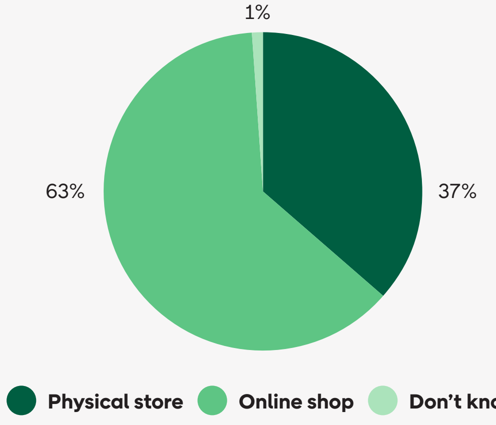


* Regarding latest purchase
** In the past year
1. Designrush, May 2025

The Nordic e-commerce landscape

Sweden

Most recent store choice*



Why shoppers choose online or physical store

Top categories per channel

Physical store		Online	
Groceries	38%	Clothes & footwear	29%
Clothes & footwear	21%	Beauty & health	23%
Beauty & health	12%	Home electronics	13%
Home electronics	8%	Groceries	11%

Omnichannel

Swedes are regular and convenience-oriented online shoppers. 6 out of 10 consumers made their most recent durable good purchase online, which is slightly below the Nordic average. One reason for this might be the increased popularity of physical discount stores, such as Dollarstore** and Rusta**, among Swedes.

When consumers decide where to shop, how and when they get their products matters the most. The main reasons for choosing to shop online are the option of home delivery and lower prices. Another key factor is that the wanted product is unavailable in a store close to the consumer, leading the consumer to an online retailer. Many consumers choose to shop online because they value a quick and convenient experience. Similarly, people choose to shop in physical stores to get access to products immediately, showing that convenience can take different forms depending on the situation.

The most popular online categories are easy to ship and fit well with online shopping habits such as following social media trends and making repeat purchases. In physical stores, groceries are the most common product category. 4 out of 10 consumers bought groceries as their latest purchase in a physical store, suggesting that many shop groceries at their convenience, often close to home.

Circular e-commerce

The second-hand market is very popular in Sweden, especially among younger consumers. In the past three months, 7 out of 10 Swedes have bought or sold second-hand items, rising to 9 out of 10 among 18–29-year-olds.

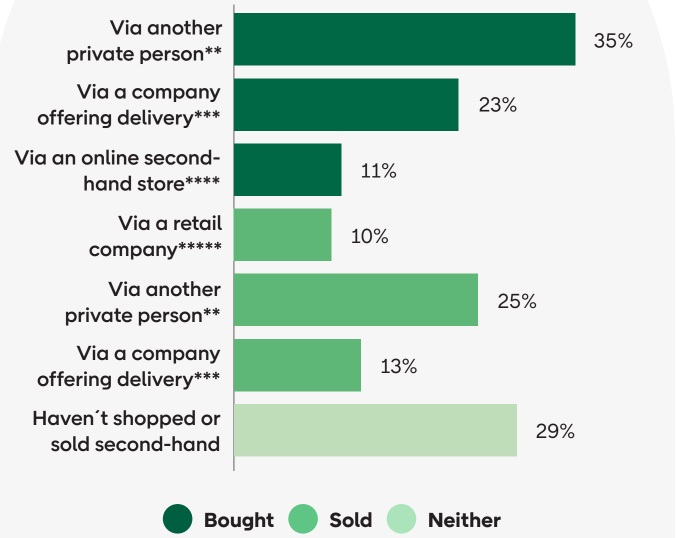
Most Swedes buy and sell second-hand from another private person via a platform such as Tradera and Blocket. 35 percent have bought and 23 percent have sold this way. Using companies with logistics solutions, like Sellpy, is the next most popular method. Looking closer at platform preferences, there is a great variation related to age. Tradera is the most popular platform overall, followed closely by Vinted and Facebook Marketplace. The youngest consumers prefer Vinted, while the eldest consumers often use Tradera or Blocket. Long-term users tend to remain loyal to their platforms, whereas younger buyers are more open to new options.

When shipping the sold second-hand items, 2 out of 3 Swedes reuse packaging available at home. While convenient, this is not always ideal for shipping, as materials like plastic bags can easily be damaged during transit.

* Excluding groceries
** Swedish discount retailer offering everyday essentials, homeware, DIY, garden, beauty and seasonal items in large, warehouse-style stores

* Used second-hand offers the last three months ** E.g. Blocket, Tradera
*** E.g. Sellpy **** E.g. Myrorna.se ***** E.g. Elgiganten

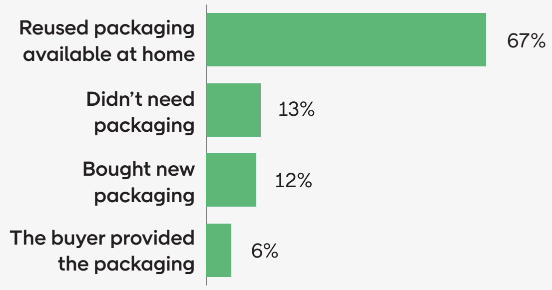
Used second-hand offers*



Most popular second-hand marketplaces to shop from

1. Tradera **37%**
2. Vinted **36%**
3. Facebook Marketplace **35%**
4. Blocket **22%**
5. Sellpy **20%**

Packaging used for latest item sold second-hand



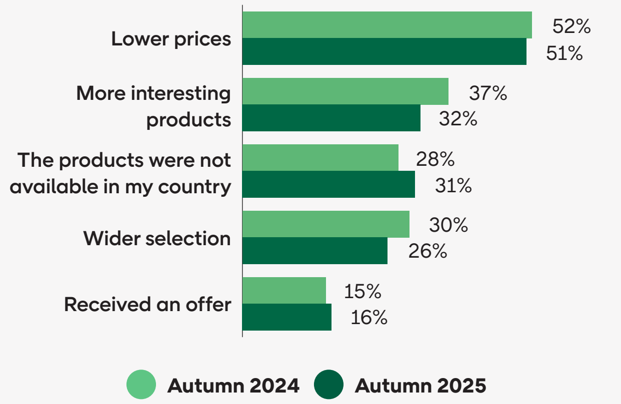
The Nordic e-commerce landscape

Denmark

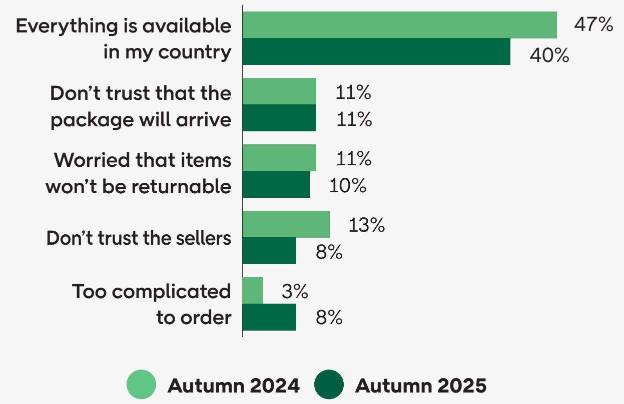
Top countries for latest purchase

	Autumn 2024	Autumn 2025
1. China	29%	**25%**
2. Germany	21%	**22%**
3. Sweden	16%	**18%**

Reasons for shopping from abroad*



Reasons for not shopping from abroad**



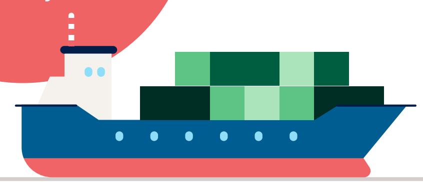
Global e-commerce

Cross-border shopping has become even more common in Denmark. 82 percent of consumers have made at least one purchase from abroad during the last year, compared to 80 percent the year before. One contributing factor is the increasing trust in international transactions. When looking at consumers' latest purchase, China remains the most common country to shop from, but its share has declined slightly in favor of closer markets such as Sweden and Germany.

The Danish consumers are willing to look abroad when they see opportunities for better value or access to niche products unavailable domestically. Older consumers, aged 50–79, are particularly focused on lower prices, reflecting greater price sensitivity. Younger Danes, aged 18–49, are on the other hand more often persuaded by targeted online offers, reflecting their greater activity and presence in digital environments.

Fewer Danes now say they refrain from shopping abroad because they can find everything they need domestically. At the same time the perceived complexity of the buying process has become a more pressing barrier, suggesting that although the motivation to shop abroad is increasing, practical hurdles risk limiting this development.

82 %
have shopped online from abroad during the last year

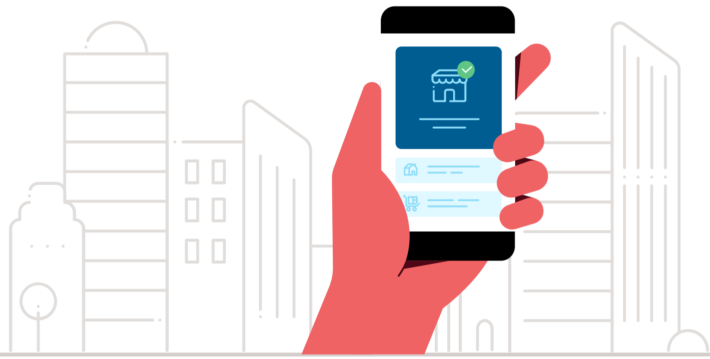


Checkout

The online checkout process generally lives up to what the Danish consumer expects. Although, consumers aged 18–29 are significantly less satisfied, with 74 percent being content with the checkout process. This reflects the younger generation's higher expectations for speed and seamlessness in digital services, making their demands more difficult to meet.

For most Danes, a secure payment process is regarded as a given rather than a differentiator. It is essential for a smooth checkout, but not something most Danes feel requires further improvement, suggesting that retailers have largely succeeded in building trust around payment security. Instead, Danish consumers increasingly focus on convenience. They want the checkout process to be as seamless as possible, and in this interaction, they place greater value on having a wide range of payment methods than on delivery options.

Cost considerations remain central, reflecting the overall price-consciousness of Danish consumers. The strongest demand for improvement is the removal of delivery fees, which is also a factor seen as important for a smooth checkout. Therefore, free deliveries remain worth exploring and evaluating further, despite carrying a cost for retailers.



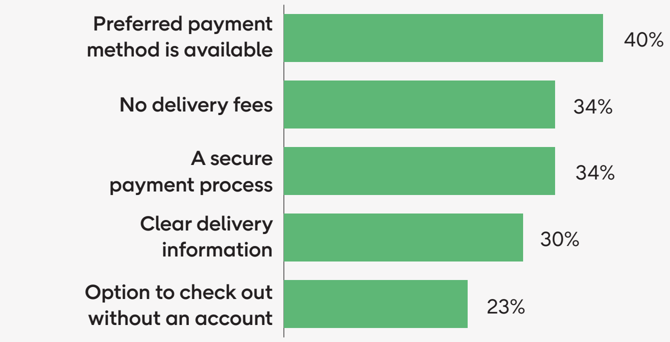
* Regarding latest purchase
** In the past year

Recent checkout experience

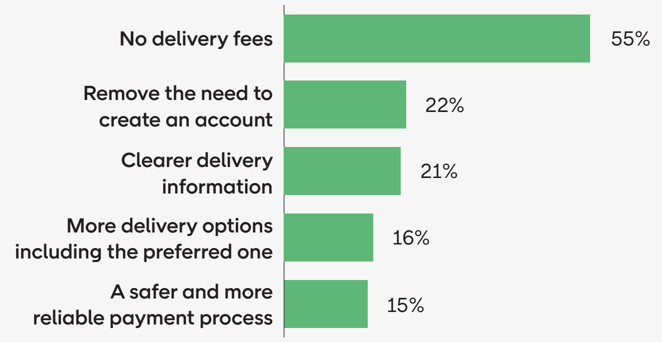
87%

were satisfied with the checkout experience during their latest online purchase

Top factors for a smooth online checkout



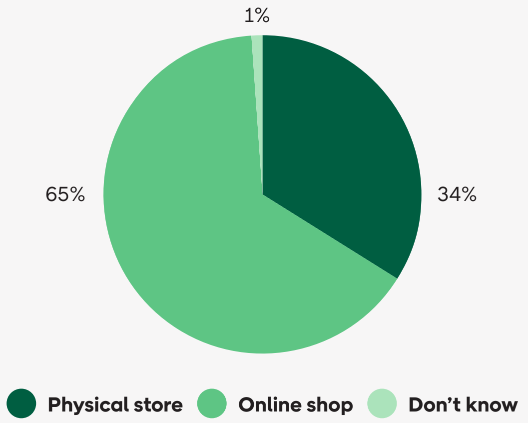
What shoppers want improved in online checkout



The Nordic e-commerce landscape

Denmark

Most recent store choice*



Why shoppers choose online or physical store

Top categories per channel

Physical store		Online	
Groceries	41%	Clothes & footwear	40%
Clothes & footwear	25%	Beauty & health	13%
Home electronics	11%	Home electronics	13%
Beauty & health	8%	Groceries	11%

Omnichannel

Online shopping continues to be a popular choice in Denmark. Two thirds of consumers most recently chose an online store for their shopping of durable goods. Convenience and cost play major roles in this preference; this is reflected in delivery factors and price being the central drivers, while a wide assortment of products also make online channels particularly attractive.

Motivations, however, differ across age groups. For consumers aged 65–79, price is a particularly strong factor, with this group being about three times more likely than the youngest group to cite cost as their main reason for shopping online. Among Danes aged 18–29, home delivery is a much more significant advantage, being cited about twice as often than by those aged 65–79. This contrast suggests that while seniors are guided by budget considerations, younger shoppers place higher value on convenience and time savings.

For choosing to shop in a physical store, time, which is also a factor of convenience, and price are key drivers. In other words, price and convenience motivate consumers to shop in both channels, but the preferred option depends on the situation and the product. For example, clothing and footwear are commonly purchased through both sales channels but at times for different reasons. For example, if consumers want a specific brand that is not available locally, online shopping is more convenient, whereas buying in-store is preferable when they need an outfit quickly, such as for a last-minute event.

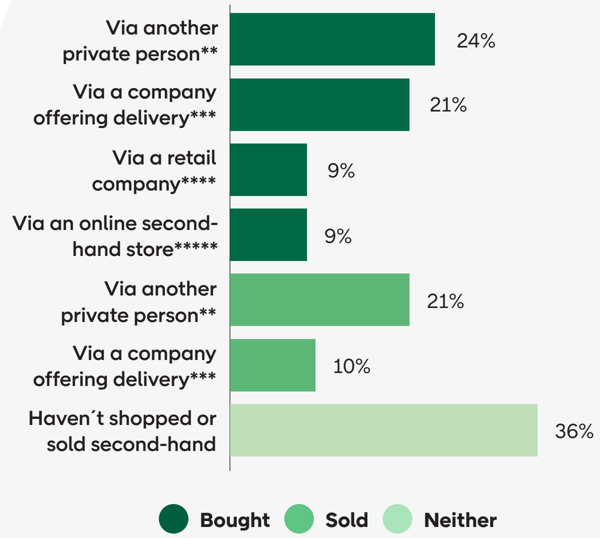
Circular e-commerce

The second-hand market has become an important part of Danish consumer culture, yet there is still potential to grow as 36 percent of consumers remain outside the market. This is the largest share of consumers outside the second-hand market online among the Nordic countries. However, there are big differences between the generations. In the youngest age group, only 16 percent have not engaged in the second-hand market in the past three months, compared with 69 percent in the oldest age group. This is partly due to generational differences in sustainability views and digital habits.

When Danes shop second-hand, they most often turn to peer-to-peer platforms such as Vinted and Facebook Marketplace. The popularity of Vinted and Facebook Marketplace points to the growing role of consumer-to-consumer solutions and suggests that Danes show a relatively high level of trust in the digital tools that facilitate these exchanges. The preference indicates that peer-to-peer systems have become an established part of the second-hand market.

Most Danes reuse materials they already have at home when shipping items they have sold, reducing waste and lowering costs. Interestingly, reusing packaging is less common among 18–29-year-olds, the age group that engages the most in the second--hand market. One explanation could be that their high level of engagement in reselling leads them to buy packaging in bulk specifically for shipping, instead of relying on reused packaging.

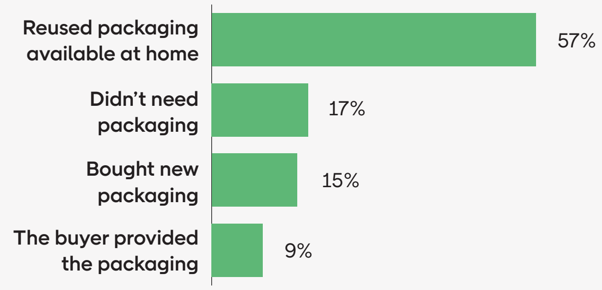
Used second-hand offers*



Most popular second-hand marketplaces to shop from

1. Vinted **41%**
2. Facebook Marketplace **40%**
3. DBA Den Blå Avis **29%**
4. Tradera **11%**
5. Sellpy **9%**

Packaging used for latest item sold second-hand



* Excluding groceries

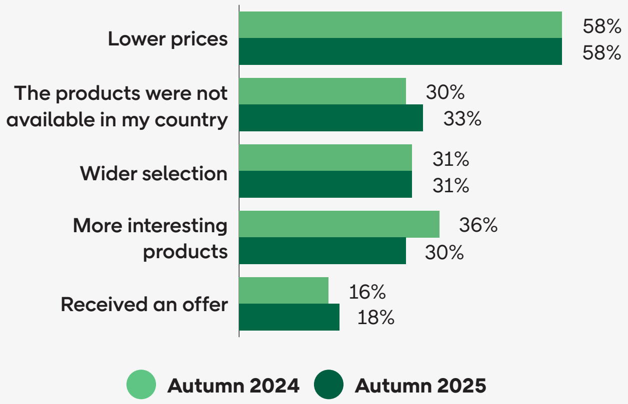
* Used second-hand offers the last three months ** E.g. Facebook Marketplace *** E.g. Vinted **** E.g. Elgiganten ***** E.g. Sellpy

Finland

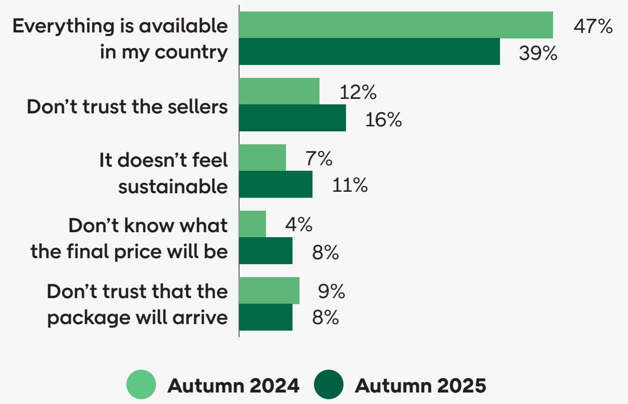
Top countries for latest purchase

	Autumn 2024	Autumn 2025
1. Sweden	28%	**25%**
2. China	25%	**25%**
3. Germany	19%	**21%**

Reasons for shopping from abroad*



Reasons for not shopping from abroad**



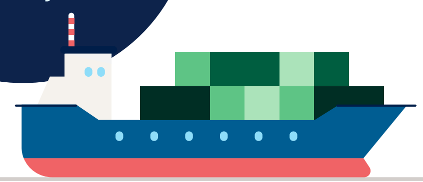
Global e-commerce

The share of Finnish consumers who have shopped from abroad has increased compared to 2024. 80 percent have shopped online from abroad during the last year, compared to 74 percent in Autumn 2024.

Sweden remains the most popular country to shop from, although losing market shares to Germany. Finns are the most price-driven consumers in the Nordics when shopping from abroad. Other important drivers are a wide selection and that the desired products are unavailable locally. More consumers purchased from abroad because the product they wanted was unavailable in Finland, compared to last year. This could partly be explained by social media trends, which might have increased demand for niche or micro-trend products, which are often found only on certain markets in the beginning.

In line with this, less Finnish consumers cite that they can find everything they need domestically as a reason for not shopping from abroad. Instead, an increasing number of Finns find it difficult to navigate foreign websites and have concerns over delivery reliability. This represents an opportunity for foreign retailers to address these issues to attract Finnish consumers.

80%
have shopped online from abroad during the last year

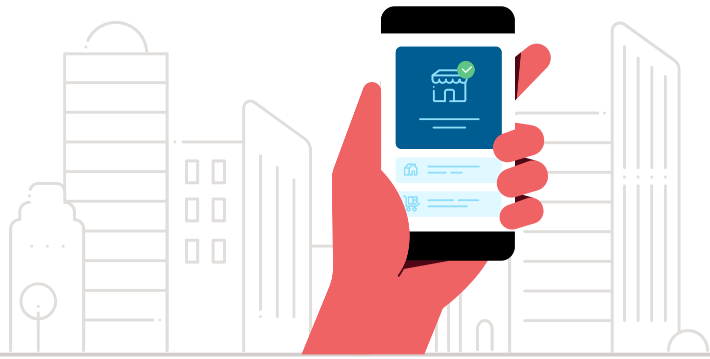


Checkout

Finnish consumers value a checkout experience that matches their preferences for payment and delivery. 89 percent were satisfied with their most recent online checkout experience, suggesting that their preferences are largely being met.

In Finland, a smooth checkout is primarily associated with preferred and secure payment options. Finns value a secure and reliable payment process more than consumers in the neighboring countries and are also the most eager to see it improved. While it is important across all age groups that the preferred payment method is available, the importance increases with age. As younger consumers tend to shop online more often than older consumers, they might be more flexible and confident in adjusting and using multiple payment options.

When it comes to which improvements Finns want in the checkout process, more than half of them would like free deliveries. This goes hand in hand with Finns being driven by price to a great extent when shopping online, more so than the average Nordic consumer. Further, they believe that the checkout process could be improved by removing the need to create an account.

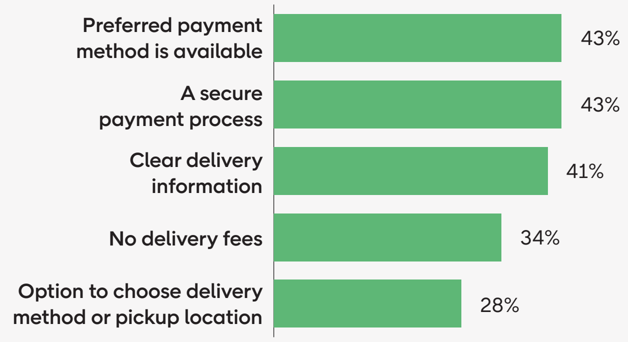


Recent checkout experience

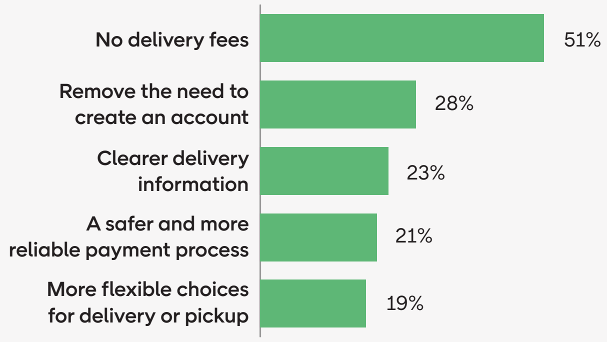
89%

were satisfied with the checkout experience during their latest online purchase

Top factors for a smooth online checkout



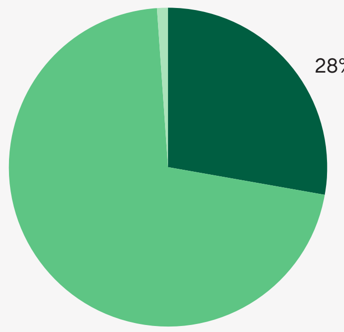
What shoppers want improved in online checkout



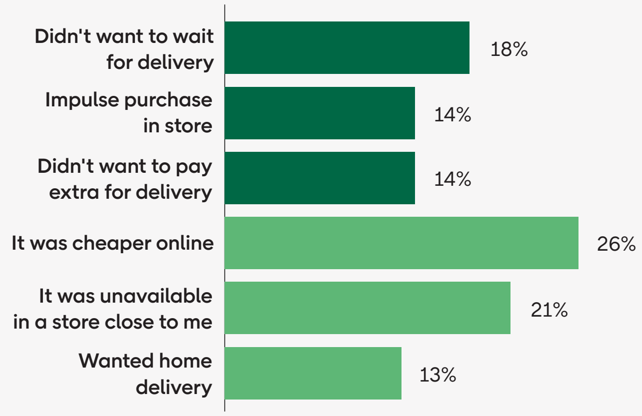
* Regarding latest purchase
** In the past year

Finland

Most recent store choice*



Why shoppers choose online or physical store



Top categories per channel

Physical store		Online	
Groceries	32%	Clothes & footwear	33%
Clothes & footwear	19%	Home electronics	14%
Beauty & health	14%	Beauty & health	13%
Home electronics	10%	Groceries	10%

Omnichannel

Finnish consumers favor online shopping above in-store when purchasing durable goods, in other words items such as clothes, books, and headphones to mention a few examples. For their most recent purchase, 7 out of 10 Finns chose an online store, the largest share in the Nordic countries.

Finnish consumers are practical and efficiency-minded, prioritizing convenience and value. They choose physical stores when fast access to a product is important. Online shopping is primarily driven by low prices, especially among older consumers, and by the ability to find desired items nearby. This reflects not only a preference for convenience but also the reality that some products may simply be unavailable within a reasonable distance, especially in more remote areas. In contrast, the main reason for visiting physical stores is to avoid waiting, showing that immediacy matters for certain purchases that are available close by.

Clothes and footwear are the top categories purchased online. These products are easy to ship, returnable, and convenient to purchase without visiting a store. In physical stores, groceries are the top category, reflecting everyday, often unplanned, shopping habits.

Circular e-commerce

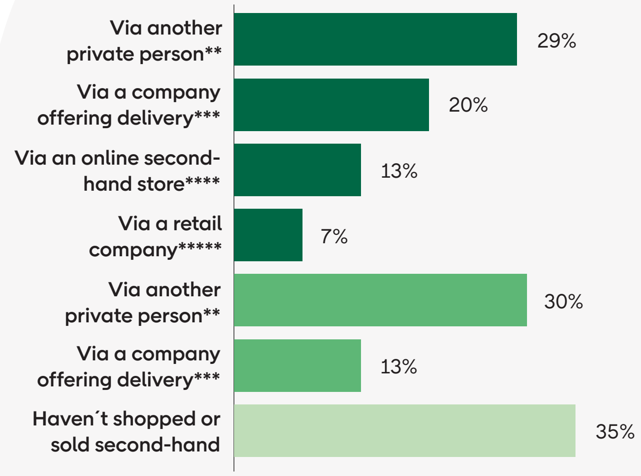
Many consumers in Finland are active on the second-hand market, more than 60 percent have bought or sold second-hand items during the past three months. However, Finland also had the highest share of consumers who did not engage in any second-hand shopping during that period in the Nordics.

Younger consumers are more frequent on the second-hand market than older consumers. 86 percent of the 18–29-year-olds have shopped or sold second-hand compared to only 39 percent of the 65–79-year-olds. One explanation is that younger consumers tend to be more active on platforms such as TikTok, where second-hand shopping is more visible, appealing, and socially accepted.

Finnish consumers prefer to buy and sell second-hand to other private persons via a platform. The most popular second-hand marketplace to shop from is Tori. Tori is a marketplace where consumers and companies can buy, sell, and rent everything from holiday homes to animals and cars.

When shipping a sold second-hand item, it is generally most popular to reuse packaging available at home. Two explanations to this is that it is cost-friendly and convenient.

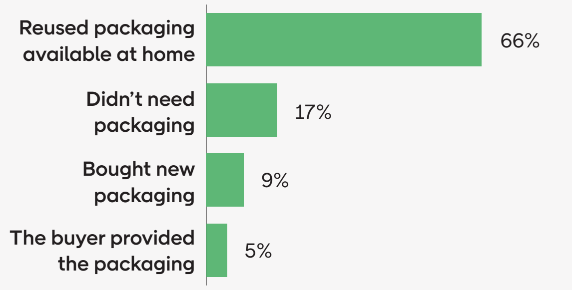
Used second-hand offers*



Most popular second-hand marketplaces to shop from

1. Tori **54%**
2. Vinted **40%**
3. Facebook Marketplace **22%**
4. Sellpy **7%**
5. Tradera **5%**

Packaging used for latest item sold second-hand



* Excluding groceries

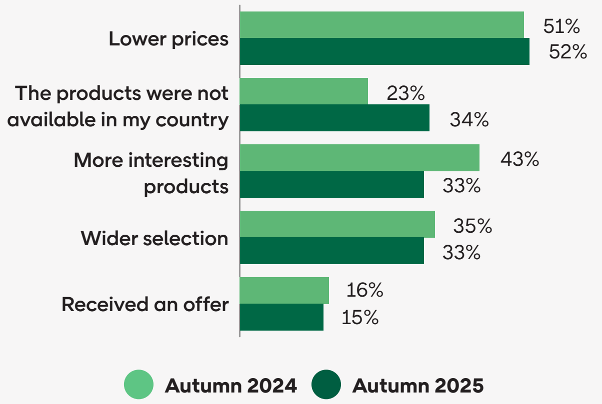
* Used second-hand offers the last three months ** E.g. Tori, Facebook Marketplace
*** E.g. Sellpy, Plick, Vinted **** E.g. SPR Kontti ***** E.g. Polarn O. Pyret, Cervera

Norway

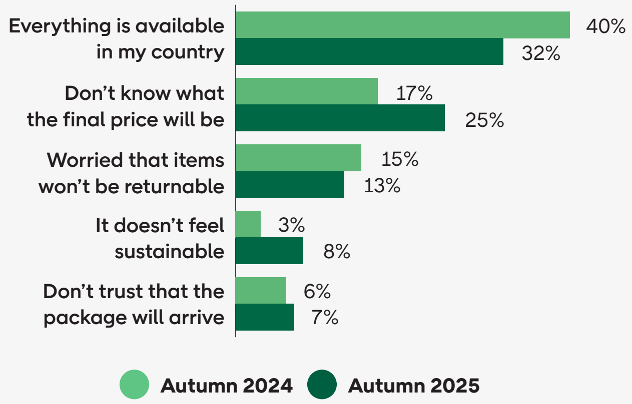
Top countries for latest purchase

	Autumn 2024	**Autumn 2025**
1. China	31%	**34%**
2. Sweden	18%	**21%**
3. USA	11%	**8%**

Reasons for shopping from abroad*



Reasons for not shopping from abroad**



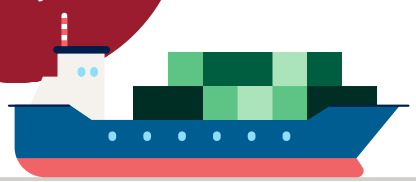
Global e-commerce

Norway has seen a slight decrease in the share of consumers shopping from abroad over the past year. While 81 percent of the Norwegian consumers still have made a purchase from abroad, this is down from 85 percent in 2024. However, Chinese retailers are still the most common to shop from and have increased in popularity, in terms of country for latest purchase.

An analysis of why Norwegians shop from abroad shows that while lower prices remain the main driver, the absence of desired products domestically has become more important. Over the past years, micro trends and niche products have become increasingly popular and widely spread, especially through social media channels such as TikTok. At first, many of these products are only available on a limited number of markets, prompting consumers to turn to international websites in their search for these products.

When it comes to reasons for not shopping abroad, "everything is available in my country" remains the top factor, though its share has declined. Instead, consumers have become more wary of cross-border shopping, partly due to the tariffs recently imposed by the US. These have created market volatility and uncertainty, which is also reflected in the significant increase in the difficulty for consumers to predict the final price.

81%
have shopped online from abroad during the last year

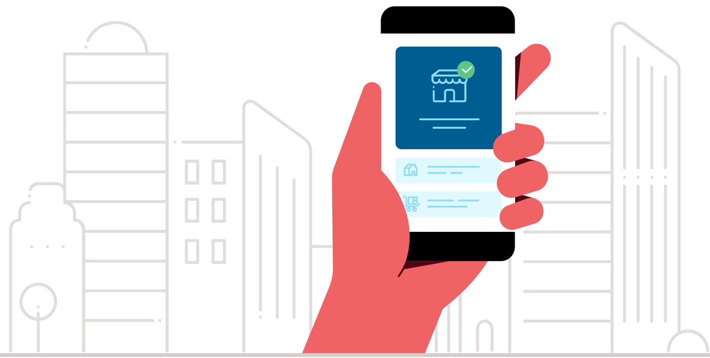


Checkout

Norwegian online shoppers are in general satisfied with their checkout experiences, with nearly 9 out of 10 being so at their most recent purchase online.

More than half of the Norwegians consider the availability of their preferred payment method to be important for a smooth checkout. This is followed by free deliveries and clear delivery information. While the consumers' needs for preferred payment options appear to be well met in general, there is more room for improvement in delivery clarity and cost. As these are both highly valued and commonly cited areas for enhancement, they are of great importance for retailers to keep track of to ensure satisfied customers.

While the availability of a preferred payment method is the most important factor across all age groups, the importance of other factors varies. For instance, the ability to check out without creating an account becomes increasingly important among younger consumers, for whom the extra step of registration is often seen as a greater obstacle to a smooth and seamless checkout experience. Whether to require customers to create an account or not is a balancing act for retailers, who must weigh customer satisfaction against the growing value of data.

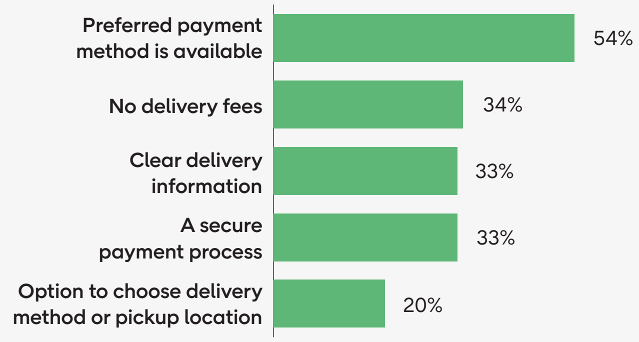


Recent checkout experience

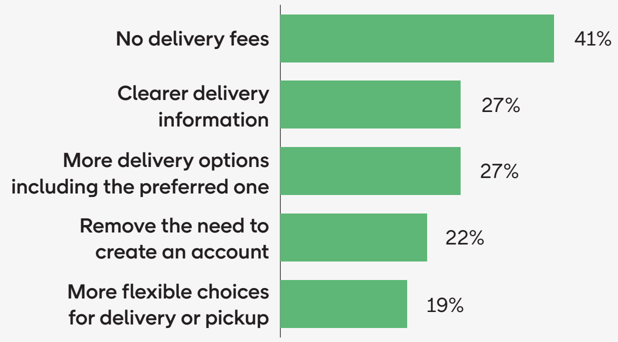
87%

were satisfied with the checkout experience during their latest online purchase

Top factors for a smooth online checkout



What shoppers want improved in online checkout

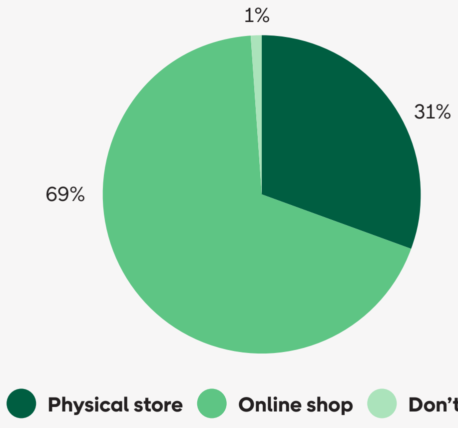


* Regarding latest purchase
** In the past year

The Nordic e-commerce landscape

Norway

Most recent store choice*



Why shoppers choose online or physical store

Top categories per channel

Physical store		Online	
Groceries	30%	Clothes & footwear	37%
Clothes & footwear	25%	Beauty & health	16%
Beauty & health	11%	Home electronics	12%
Home electronics	8%	Other**	7%

Omnichannel

7 out of 10 Norwegians made their latest purchase of durable goods online. A lower price is the primary reason for choosing an online store over a physical one. Convenience-related factors also weigh heavily. The desire for home delivery and the limited assortment available in nearby physical stores both rank among the top three motivations for shopping online.

When analysing why consumers primarily choose to shop in a physical store, the main reason is the ability to get items immediately, followed by a desire to talk to store staff. Interestingly, Norwegians are the only ones in the Nordics who mainly choose to shop in physical stores due to the access to personnel. This suggests that Norwegians place a high value on in-person interactions, a trait that distinguishes them from their Nordic counterparts.

Looking at what consumers most commonly buy in the different sales channels, it is rather similar when just looking at the categories. These are items that are bought with quite high frequency, such as clothes and footwear, beauty and health, and for physical stores – groceries. However, it differs when looking at the shares of the categories, clothes and footwear dominate online, while groceries are the most common in stores.

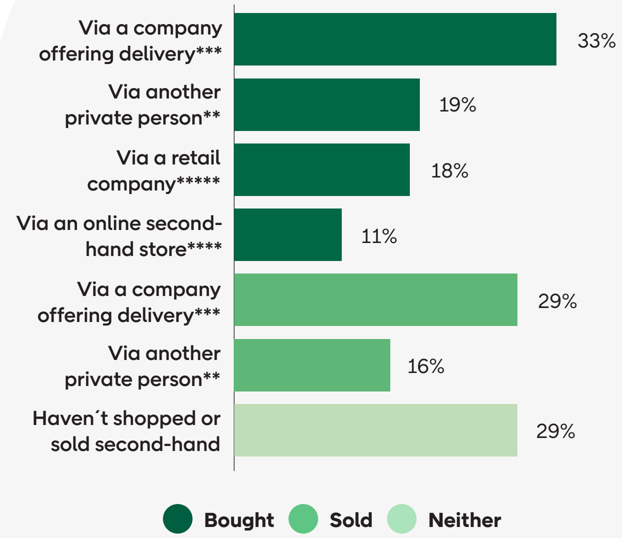
Circular e-commerce

About 7 out of 10 Norwegians have used a second-hand service, either buying or selling. However, the variation across age groups is substantial. Participation in the second-hand market clearly declines with age. While only 11 percent of the 18–29-year-olds report never using any online second-hand service, this number doubles to 22 percent for the 30–49 age group, and doubles again to 44 percent for those aged 50–64. The contrast is most pronounced among 65–79-year-olds, where as many as 60 percent have not used these services.

Peer-to-peer marketplaces are the most popular format in Norway for both buying and selling used goods, making it easy for consumers to trade directly with one another. Finn.no is an example of a peer-to-peer marketplace, and it is also the most popular second-hand marketplace in Norway. Finn.no is a local website, which offers consumers and companies to buy, sell, and advertise both goods and services, including property, cars, jobs, trips, furniture, and electronics.

59 percent of the Norwegians who sold an item during the last quarter reused packages they found at home when shipping it. This is partly because reusing existing packaging is both a cheap and convenient option for the consumers.

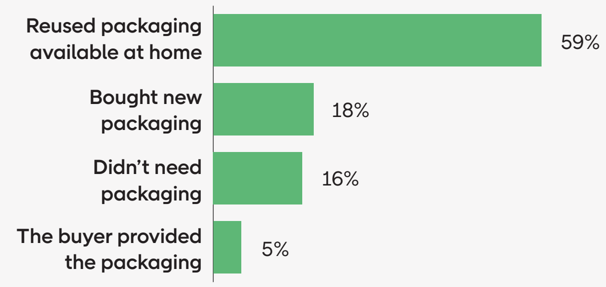
Used second-hand offers*



Most popular second-hand marketplaces to shop from

1. Finn.no **68%**
2. Tise **29%**
3. Facebook Marketplace **28%**
4. Tradera **8%**
5. Fretex **7%**

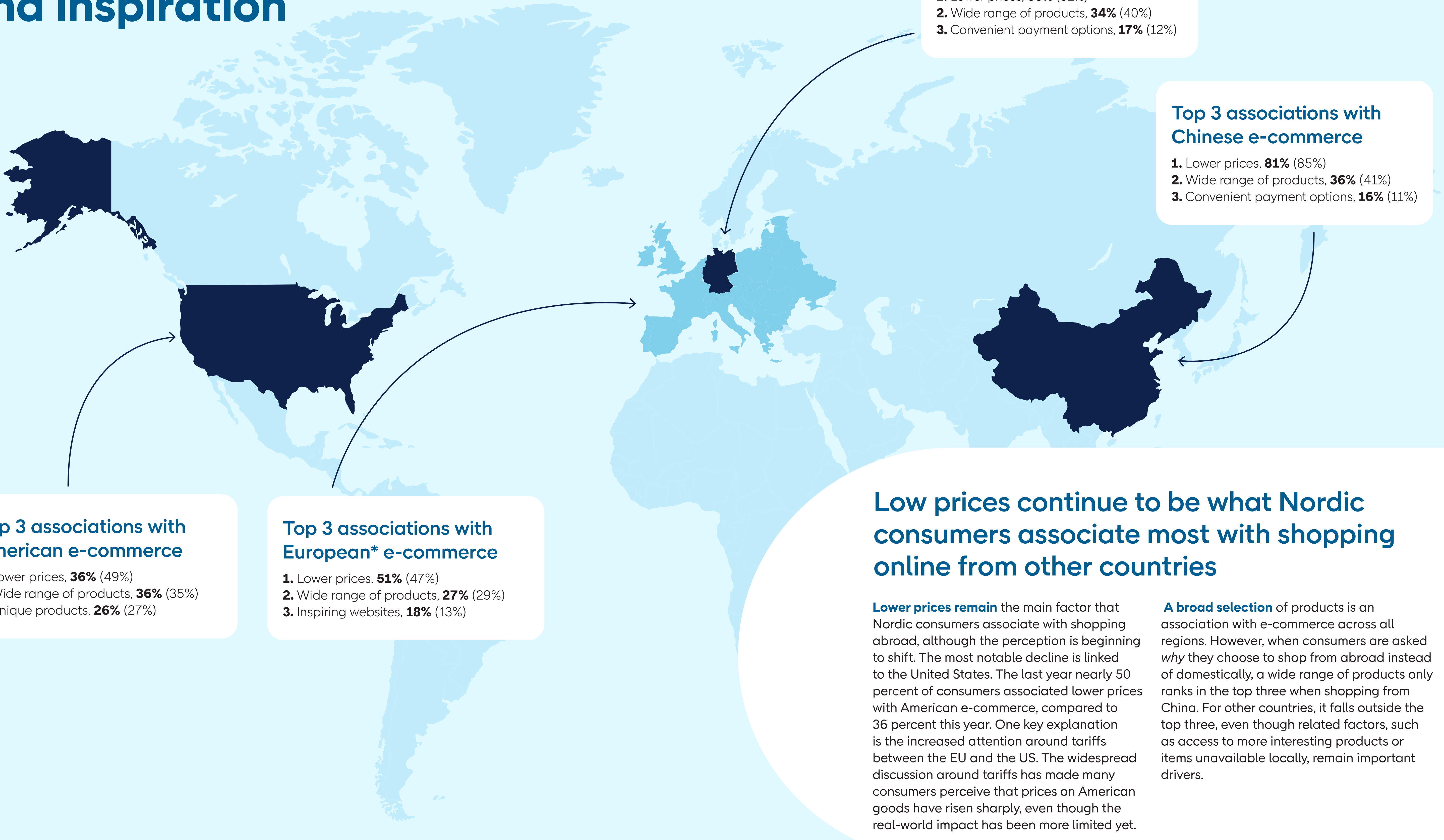
Packaging used for latest item sold second-hand



* Excluding groceries
** Other: pet accessories, crafting essentials etc.

* Used second-hand offers the last three months ** E.g. FINN.no, Tise, Facebook Marketplace *** E.g. Sellpy, Vinted **** E.g. Fretex.no ***** E.g. Polarn O. Pyret, Elkjøp

Nordic consumers look abroad for value, variety, and inspiration



Top 3 associations with American e-commerce

1. Lower prices, **36%** (49%)
2. Wide range of products, **36%** (35%)
3. Unique products, **26%** (27%)

Top 3 associations with European* e-commerce

1. Lower prices, **51%** (47%)
2. Wide range of products, **27%** (29%)
3. Inspiring websites, **18%** (13%)

Top 3 associations with German e-commerce

1. Lower prices, **60%** (62%)
2. Wide range of products, **34%** (40%)
3. Convenient payment options, **17%** (12%)

Top 3 associations with Chinese e-commerce

1. Lower prices, **81%** (85%)
2. Wide range of products, **36%** (41%)
3. Convenient payment options, **16%** (11%)

Low prices continue to be what Nordic consumers associate most with shopping online from other countries

Lower prices remain the main factor that Nordic consumers associate with shopping abroad, although the perception is beginning to shift. The most notable decline is linked to the United States. The last year nearly 50 percent of consumers associated lower prices with American e-commerce, compared to 36 percent this year. One key explanation is the increased attention around tariffs between the EU and the US. The widespread discussion around tariffs has made many consumers perceive that prices on American goods have risen sharply, even though the real-world impact has been more limited yet.

A broad selection of products is an association with e-commerce across all regions. However, when consumers are asked *why* they choose to shop from abroad instead of domestically, a wide range of products only ranks in the top three when shopping from China. For other countries, it falls outside the top three, even though related factors, such as access to more interesting products or items unavailable locally, remain important drivers.

Based on the Nordic consumers' latest e-commerce purchase from abroad, excluding the Nordics
Results for 2024 are presented in parentheses
* Europe excluding Germany and the Nordic countries

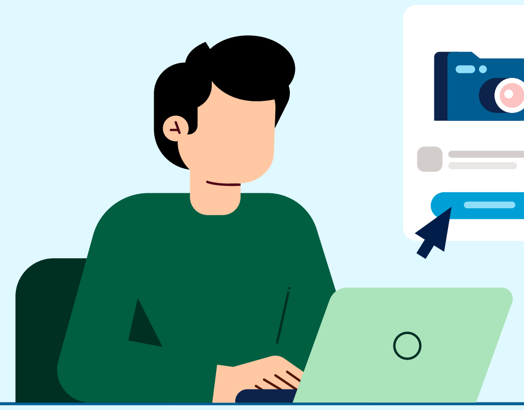
E-commerce drivers

Consumers across the Nordics are frequent online shoppers. Close to 70 percent made their most recent purchase in an online store, groceries excluded. What drives their online shopping choices varies by age group and country, influenced by local e-commerce development and access to delivery options.

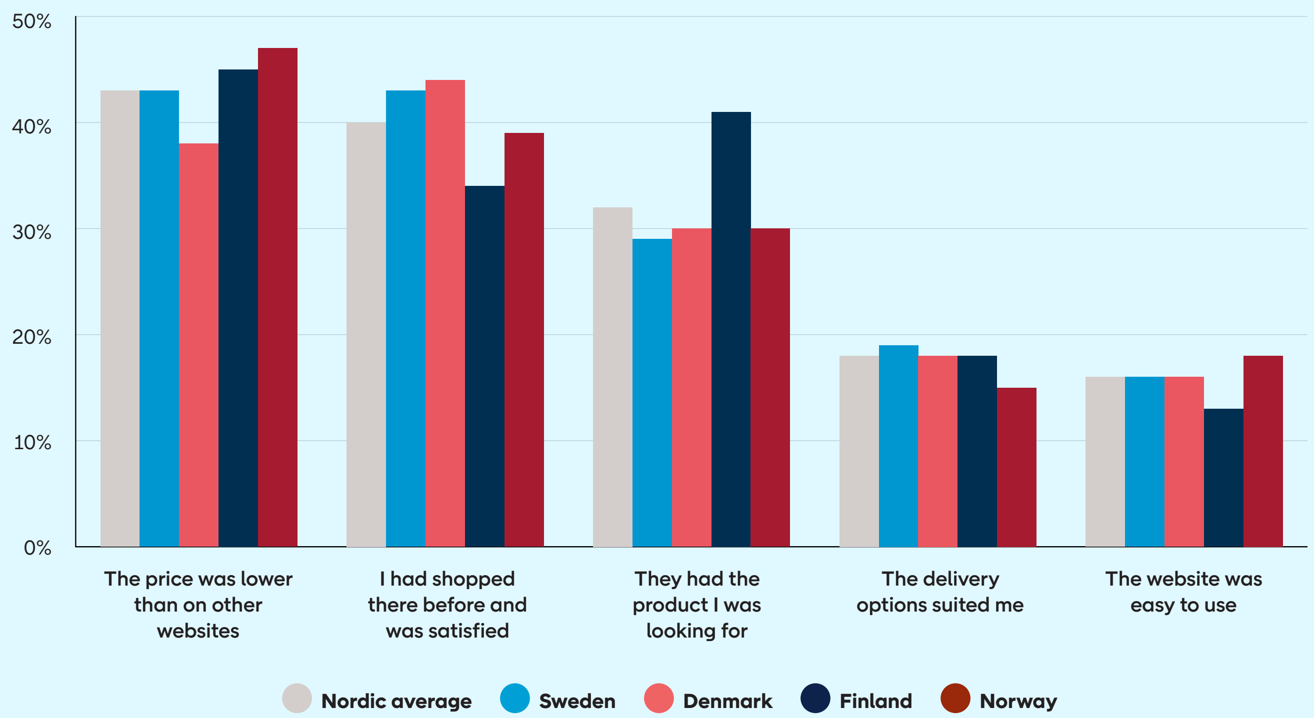
Price matters to everyone, but in different ways. Younger consumers are the most price-sensitive, often comparing across platforms and switching retailers for the best deal. Older consumers, while still attentive to price, care more about product availability and familiar shopping experiences. For them, stability outweighs chasing the absolute lowest price.

Trust and satisfaction are key loyalty factors in the Nordic countries. In Denmark and Sweden, positive past experiences strongly motivate consumers to return to a certain website in the future. Finnish consumers, on the other hand, are more product-focused, prioritizing finding the exact item they need over sticking to a preferred store.

The Nordic consumers also value delivery options that fit their lifestyles. However, this aspect is more important for consumers in big cities than for consumers in the countryside. One explanation is that urban consumers are used to speedy deliveries and flexible pick-up locations, while rural consumers do not expect the same flexibility or speed in deliveries.



Motivators for shopping in a certain online store



E-commerce barriers

As the online shopping landscape becomes more mature, the consumers´ expectations follow. Hence, they get used to reliable websites that deliver on time.

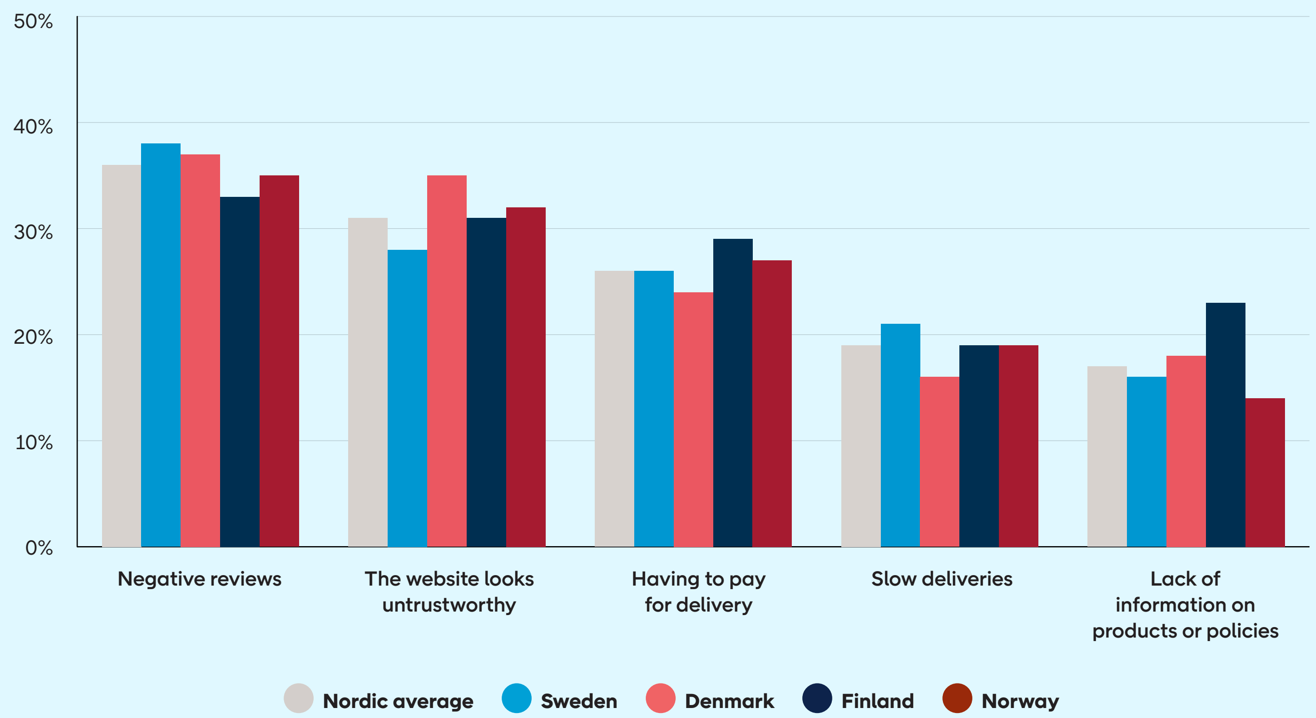
Negative reviews are the strongest barrier across all Nordic markets, and especially among younger consumers. 40 percent of the 18–29-year-olds refrain from shopping at an online store when they read negative reviews, compared to 28 percent of the 65–79-year-olds. One explanation could be that younger consumers are more likely to actively search for information and rely on reviews as a key part of their decision-making process.

Furthermore, untrustworthy-looking websites stop 35 percent of Danes from shopping at a certain store, which is above the Nordic average. In contrast, Swedish consumers are below the Nordic average, This is likely partly due to the maturity of the Swedish e-commerce market resulting in more confident online shoppers. This could lead consumers to trust even less polished websites.

Finnish consumers stand out when it comes to refraining from shopping from a certain website because it lacks product or policy information, or because of delivery fees. These concerns reflect information and cost barriers.

Overall, Nordic consumers demand reliability and transparency before committing to a purchase. Factors that raise doubts, such as poor reviews or missing information, pose a risk for the retailers as it might lead to the consumers canceling a potential purchase.

Barriers for shopping in a certain online store



Low prices increasingly important in Nordic cross-border shopping

The Nordic consumers are keen to shop online from each other. More than 1 out of 5 purchases from abroad is from a neighboring Nordic country. A general trend in Nordic cross-border shopping shows that consumers now associate neighboring countries more with lower prices than they did a year ago. This may partly reflect discussions about rising costs of buying from the US due to tariffs, which have highlighted the more transparent and often lower extra costs of shopping from the other Nordic countries.

Sweden dominates as the primary destination for online shopping in the Nordics. Price continues to be the most appealing feature of Swedish e-commerce, and a growing number of consumers associate Swedish e-commerce with this. However, it is not only lower prices that appeal to the Nordic consumers. Compared to last year, a growing share has made a purchase from Sweden for its product selection. One of the explanations is the highly developed nature of Swedish e-commerce, which often offers a broad supply of products.

Denmark is still the second most popular Nordic country for Nordic consumers to shop from. Compared to last year, lower prices now rank as the primary reason for other Nordic consumers to shop from Danish retailers. Swedish consumers make up the majority of Nordic shoppers buying from Denmark, which may explain why lower prices have become an increasingly common reason to do so. During the last year, the Danish krone has been weakened against the Swedish krona[1], making it cheaper for Swedes to shop from Denmark compared to last year.

Finland is the Nordic country from which the smallest share of consumers made their most recent purchase. When looking at why consumers shop from Finland, an increasing share cite receiving an offer as their reason for doing so. Notably, 21 percent said they were unaware they had shopped from a foreign site, making this the fourth most common reason for purchases from Finland. These two factors may be linked as consumers receive appealing offers and make a purchase without realizing the retailer is based abroad.

Norway is the third most common Nordic country for cross-border shopping. The main reason to shop from Norwegian websites is that they offer products unavailable domestically. Like Finnish sites, they are associated with "softer" qualities than Swedish and Danish ones. Beyond low prices, Norwegian e-commerce stands out for its inspiring online stores and accessible customer service. Norwegian e-commerce is the only one where an available customer service is among the top three associations.

1. Dagens industri, 2025

How Nordic consumers view e-commerce in the neighboring countries

Sweden

- **14%** (13%) of the Nordic consumers made their latest international e-commerce purchase from Sweden.
- **What the Nordic consumers shop online from Sweden:**
  - Clothes & footwear, **42%** (39%)
  - Health & beauty, **13%** (9%)
  - Home electronics, **10%** (21%)
- **Why the Nordic consumers shop from Sweden instead of domestically:**
  - Lower prices, **45%** (41%)
  - The products were not available in my country, **33%** (26%)
  - There were more interesting products, **33%** (41%)
- **What the Nordic consumers associate with Swedish e-commerce:**
  - Low prices, **54%** (49%)
  - Wide range of products, **28%** (26%)
  - Relevant delivery options, **22%** (16%)

Denmark

- **5%** (6%) of the Nordic consumers made their latest international e-commerce purchase from Denmark.
- **What the Nordic consumers shop online from Denmark:**
  - Clothes & footwear, **28%** (41%)
  - Home electronics, **18%** (21%)
  - Health & beauty, **11%** (7%)
- **Why the Nordic consumers shop from Denmark instead of domestically:**
  - Lower prices, **44%** (37%)
  - There were more interesting products, **31%** (41%)
  - The products were not available in my country, **27%** (25%)
- **What the Nordic consumers associate with Danish e-commerce:**
  - Low prices, **47%** (45%)
  - Wide range of products, **26%** (18%)
  - Relevant delivery options, **21%** (13%)

Finland

- **1%** (2%) of the Nordic consumers made their latest international e-commerce purchase from Finland.
- **What the Nordic consumers shop online from Finland:**
  - Clothes & footwear, **20%** (28%)
  - Home electronics, **16%** (13%)
  - Building materials, **13%** (3%)
- **Why the Nordic consumers shop from Finland instead of domestically:**
  - The products were not available in my country, **33%** (45%)
  - I received an offer to buy the product, **27%** (20%)
  - There were more interesting products, **25%** (31%)
- **What the Nordic consumers associate with Finnish e-commerce:**
  - Low prices, **34%** (32%)
  - Personalized service, **29%** (20%)
  - Inspiring online stores, **28%** (25%)

Norway

- **2%** (2%) of the Nordic consumers made their latest international e-commerce purchase from Norway.
- **What the Nordic consumers shop online from Norway:**
  - Clothes & footwear, **38%** (34%)
  - Home electronics, **15%** (35%)
  - Health & beauty, **10%** (7%)
- **Why the Nordic consumers shop from Norway instead of domestically:**
  - The products were not available in my country, **38%** (12%)
  - I received an offer to buy the product, **30%** (24%)
  - Lower prices, **23%** (17%)
- **What the Nordic consumers associate with Norwegian e-commerce:**
  - Low prices, **41%** (24%)
  - Inspiring online stores, **23%** (20%)
  - Available customer service, **21%** (39%)

Weighted results for 2024 are presented in parentheses

Inside the Nordic checkout experience

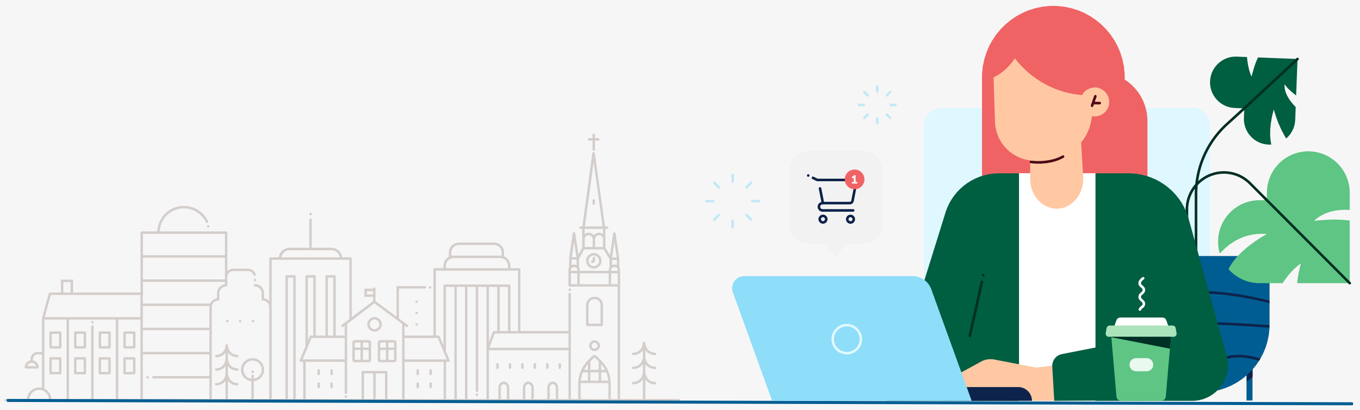
Across the Nordic region, consumers are broadly satisfied with the online checkout experience, where smooth payments and transparent delivery processes are central. The most important elements are having access to preferred payment methods, clear delivery information, and a secure and reliable payment process. However, what drives satisfaction can vary somewhat by country. Norwegians place particular emphasis on being able to use their preferred payment method, while Finns and Swedes highlight the importance of clear delivery information.

Building on these preferences, retailers looking to strengthen customer satisfaction can focus on several areas. Allowing shoppers to finalize a purchase without creating an account, ensuring simple and transparent delivery details, and offering more flexibility around deliveries all stand out as key improvements. Free delivery is the most requested improvement across the Nordics, especially in Denmark and Finland. Swedes stand out as they value the ability to complete a purchase without account registration more than consumers in their neighboring countries, and Norwegians are more prone to ask for a wider range of delivery options.

Ultimately, both payment and delivery factors shape how consumers perceive value. Offering free or reduced-cost shipping can be an effective way to appeal to cost-conscious shoppers, while improving delivery customization without raising fees can enhance perceived value for money. Since unclear or inconvenient delivery and payment options are also major reasons for cart abandonment, investing in these areas can significantly increase purchase completion rates.

Age differences further nuance these patterns. Consumers aged 65–79, place the greatest emphasis on being able to use their preferred payment method, reflecting both long-established payment habits and a desire for familiarity in digital transactions. Those aged 30–49, by contrast, focus more on clear delivery information, likely due to the need to coordinate busy family and work schedules with reliable deliveries. Shoppers aged 18–29 are less concerned with delivery-related factors such as free shipping, the ability to choose delivery options, or specific pickup locations. This group, which to a greater extent has grown up with fast and flexible e-commerce, may take such features for granted.

In summary, while Nordic consumers are generally content with online checkouts, their satisfaction continues to hinge on how well payment and delivery options align with expectations. In a highly competitive e-commerce landscape, fine-tuning these aspects to local and demographic preferences can be decisive in securing lasting customer loyalty.

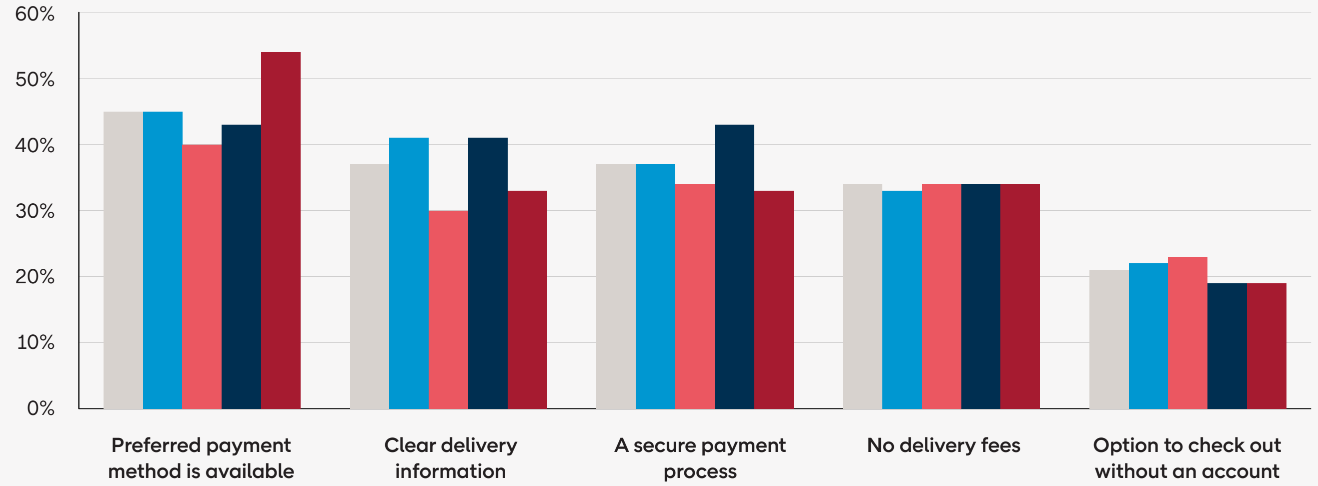


High satisfaction with the checkout process among Nordic consumers

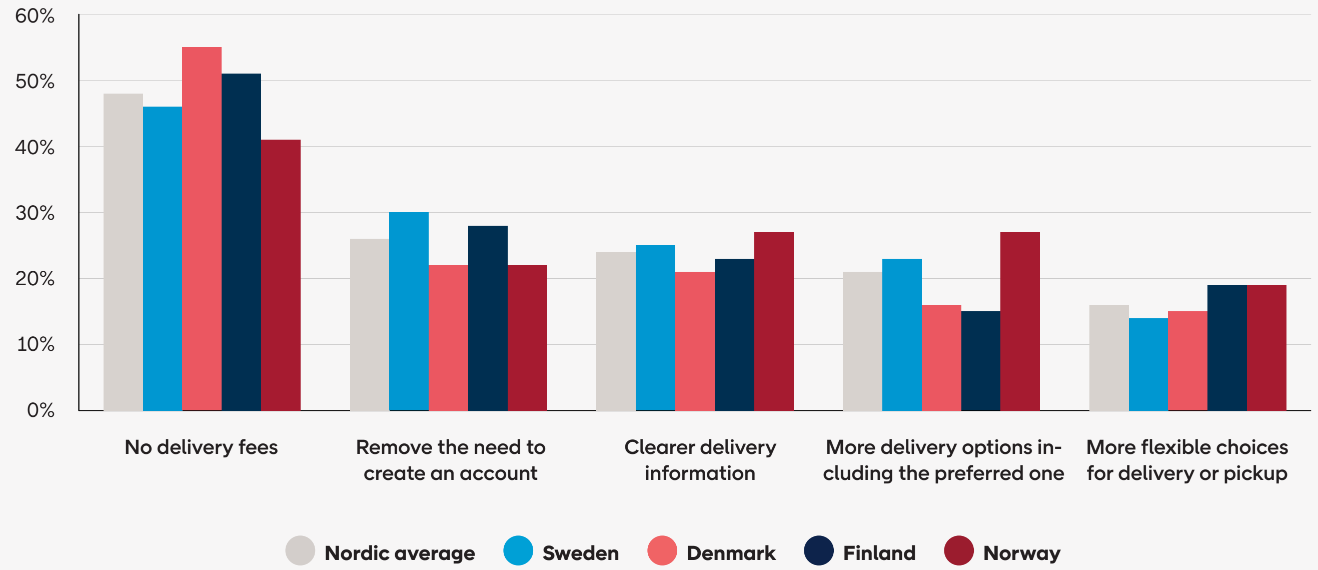
Nordics	Sweden	Denmark	Finland	Norway
87%	86%	87%	89%	87%

Share of consumers who were satisfied with the checkout at their latest purchase

Most important factors for online checkout satisfaction



Top factors shoppers want improved in the checkout experience



Second-hand in the Nordics

Most Nordic consumers state that they have bought the same amount of second-hand products online as the year before*.

There is a close balance between growth and decline. 23 percent have bought more second-hand while 22 percent have bought less. One explanation is that while interest in second-hand is increasing for some, others may be reducing purchases due to factors like convenience, quality perceptions, or affordability of new items.

Younger consumers are more active on second-hand platforms. 92 percent of the 18–29-year-olds have purchased second-hand products online during the last year, compared to 63 percent of the 65–79-year-olds. The younger consumers are used to digital tools and are often more open to try out new ways of shopping. Older consumers, on the other hand, might be less inclined to shop second-hand online due to long-standing shopping habits and less comfort with online platforms. Denmark has the largest share of both younger and older consumers that have not bought second-hand online at all, compared to their Nordic neighbors.

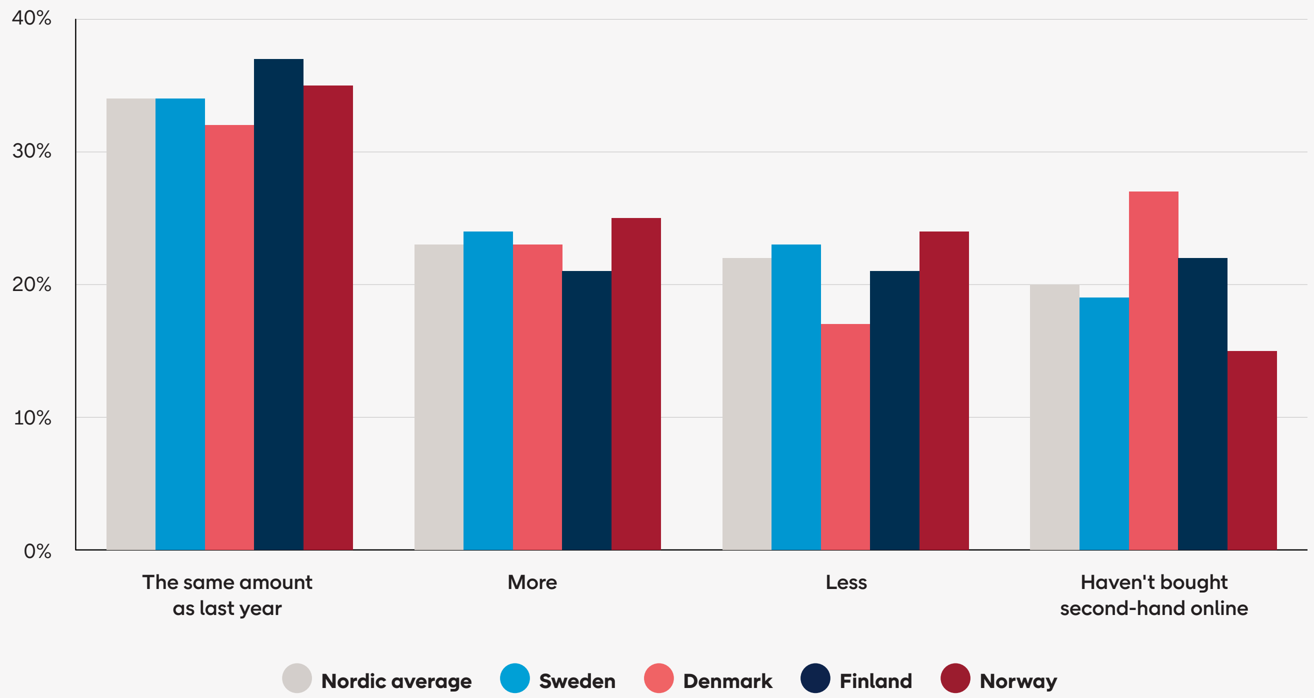
Top second-hand platforms in the Nordics

1.	Facebook Marketplace
2.	Vinted
3.	Tradera

When it comes to where people buy and sell, Tradera, Vinted, and Facebook Marketplace are the most popular choices across the Nordics. These platforms are all peer-to-peer platforms, but with different levels of service for the buyer and seller. Both Tradera and Vinted offer more support for payments and shipping than Facebook Marketplace.

Overall, second-hand shopping in the Nordics is shaped by both values and habits. Younger people are driving growth, while older groups stay more cautious. At the same time, simple and user-friendly platforms make it easier for people to take part in the circular economy.

Change in online second-hand purchases over the past year



* In this segment, the questions aim to analyze whether consumers have bought second-hand products online in the past year. It is not the same data as in previous pages, where the question for the second-hand market is aimed to analyze whether consumers have bought or sold second-hand items online during the past three months.

From barrier to bargain

The drivers of second-hand shopping in the Nordic countries often come down to a mix of convenience and price sensitivity, even if they can vary.

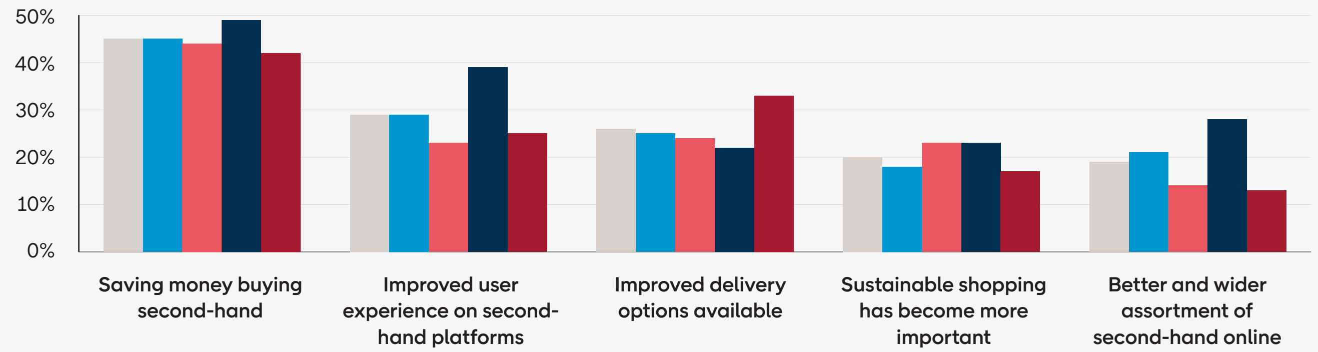
Saving money is an important reason for buying more second-hand online across all Nordic countries, and especially among women. Female shoppers view second-hand as a way to save money more than men. One explanation could be that women, on average, tend to have lower incomes, which may make them more willing to spend the extra time it takes to find quality second-hand items.

Especially in Finland, improved user experience can be linked to why consumers have increased their second-hand purchases. With better platforms, buying second-hand has become easier and more accessible. This, combined with a clear economic benefit, has made Finns increase their second-hand orders.

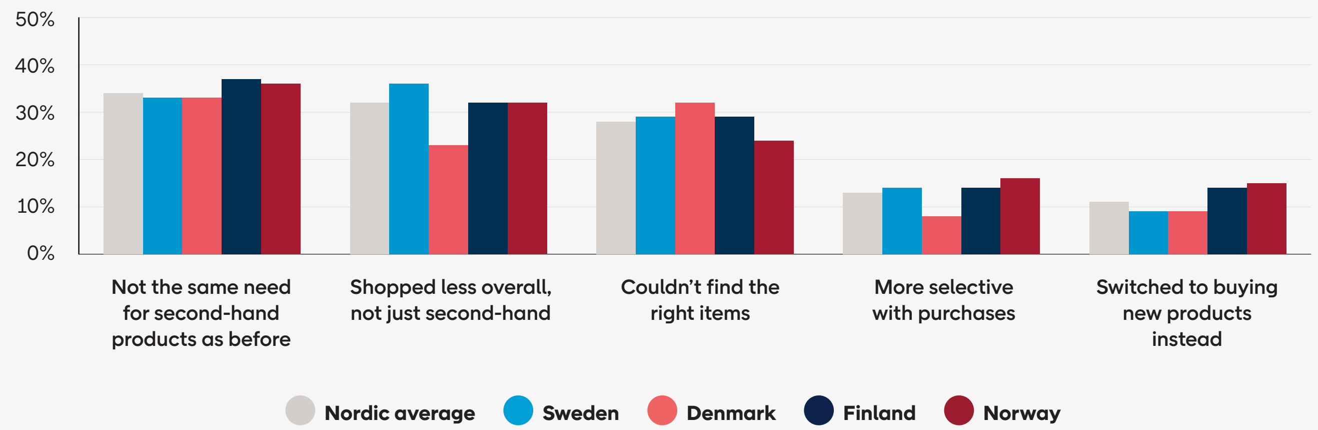
When examining why consumers are buying less second-hand, more than 1 out of 3 Nordic consumers say it is simply because they have no need for such products. Many also report shopping less overall, which could partly be due to a growing awareness of overconsumption. In addition, consumers find it difficult finding the right items, especially in Denmark. Improving product availability and search functions could therefore help second-hand marketplaces boost consumers' participation in the circular economy.

To conclude, the success of second-hand shopping depends on more than price. User-friendly platforms are key to making second-hand feel easy, reliable, and worthwhile.

Reasons for buying more second-hand online



Reasons for buying less second-hand online



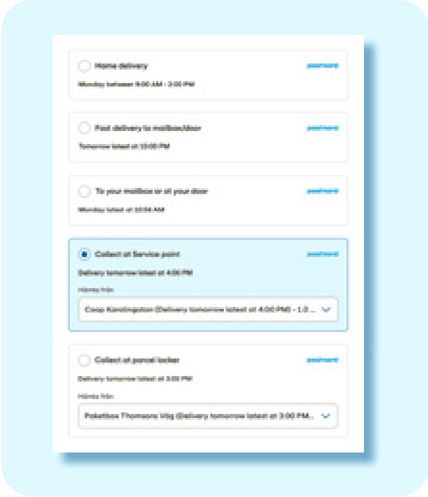
Delivery solutions in the Nordics – From speed to control and sustainability

We spoke with Filip Egger from Quickbutik and Anna Norstedt from nShift to explore how Nordic consumer behavior is reshaping delivery solutions – covering everything from ETA communication and flexible delivery times to sustainability and evolving checkout experiences.

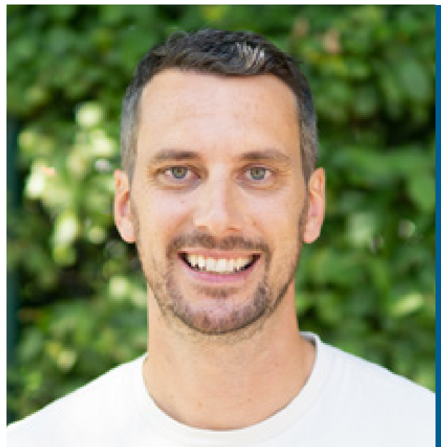
The Nordic region has long been ahead in logistics innovation, shaped by digitally mature consumers who expect transparency, choice, and trust. Over the past few years, delivery expectations have shifted dramatically – from speed as the main differentiator to control, flexibility, and sustainability as the new standard. Retailers and platforms are adapting quickly. Filip explains: "Demand has moved from speed to control. Consumers want to choose how, when, and where they receive their goods."

This shift is visible in the rise of parcel lockers, flexible home deliveries, and omnichannel return options. Checkout is no longer just the final step – it's where trust is built. Merchants offering clear options and transparent terms not only sell more but also reduce support issues and improve customer satisfaction. Sustainability is another defining trend. Official ecolabels like the Nordic Swan are not yet standard, but interest is growing fast. Anna notes: "Retailers are increasingly highlighting sustainable delivery choices through recognized badges – such as the Nordic Swan Ecolabel – along with short descriptions and checkout features that make it easy for customers to identify greener options."

Both experts agree that communication is key. ETA visibility and delivery flexibility – covered in detail in the fact boxes – are now baseline expectations. Consumers want precise information, not vague promises like "within one to three days." As Filip puts it: "A clear delivery experience is built just as much on reliability and predictability as on speed."



Platforms are responding by strengthening support for sustainability and delivery transparency in checkout, while collaborating closely with logistics partners to make insights actionable for merchants. Anna summarizes the bigger picture: "Nordic consumers have moved from a one-size-fits-all approach to expecting a mix of flexible, sustainable, and convenient delivery solutions, supported by real-time tracking and transparent communication."



Filip Egger, Head of Product, Quickbutik

"As a platform with merchants across the Nordics, we closely follow market developments—even though it's primarily our logistics partners and store owners who have direct contact with the end customer in the delivery chain. Our role is more about enabling choices, data flows, and communication in the checkout, where the delivery experience truly begins."

Filip and Anna on ...

how delivery times are communicated

Filip: "We see the same development across the Nordics: deliveries are increasingly happening on the consumer's terms. The availability of evening and weekend deliveries is growing rapidly as carriers expand their capacity and infrastructure. This creates a new expectation – faster and more flexible deliveries are no longer perceived as a premium service, but as something standard. At the same time, demands for clarity and control are increasing. Consumers want to know when the package will arrive, but also be able to influence how and where it is delivered. For us as a platform, this means the checkout needs to support this development both technically and in terms of communication. Retailers must be able to easily offer choices that reflect carriers' growing flexibility – without making the customer experience confusing or overwhelming."

Anna: "Across the Nordics, delivery patterns are evolving rapidly. While weekday daytime deliveries remain the most common, evening and weekend deliveries are becoming increasingly standard, particularly in larger cities where consumers expect greater flexibility.

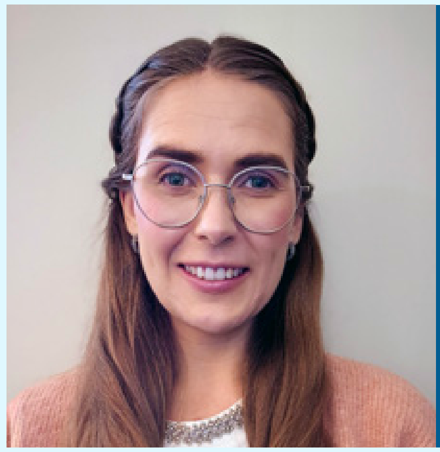
As fulfilment operations move toward 24/7 processing, delivery services are adapting to match that pace. A growing number of retailers now offer time-slot or delivery-window selection directly at checkout, allowing customers to choose exactly when their parcel arrives. This trend reflects a shift from 'fast' delivery to 'predictable and convenient' delivery - giving consumers more control and improving satisfaction."

How is ETA communicated?

Filip: "Our view is that Sweden and Denmark lead when it comes to clear ETA (the estimated time of arrival) communication, where delivery time is often visible already in the checkout. Norway and Finland offer more fixed delivery windows, but the development is moving quickly toward more dynamic and data-driven information across all markets. What we see among our merchants is a clear shift from generic promises to more precise information. Consumers no longer want to hear 'within 1–3 days' – they want to know when their specific package will arrive.It's not necessarily about making it faster, but about giving customers control and helping them plan their everyday life. A clear delivery experience is built just as much on reliability and predictability as on speed."

Anna: "Across all markets, the best practice is to show a clear, data-driven ETA early in the checkout process and to maintain consistent wording across every delivery option. The estimated delivery time is typically displayed alongside each carrier option at checkout. Equally important, however, is the post-purchase experience - keeping customers informed and reassured after they've completed their order.

Tracking emails and pages are among the most frequently viewed customer communications – offering retailers a valuable opportunity to re-engage shoppers after they've left the checkout."



Anna Norstedt, Associate Product Manager, nShift Checkout

"As the global leader in delivery and experience management, our platform connects retailers, warehouses, and logistics providers to more than 1,000 carriers worldwide, enabling businesses to optimize checkout, shipping, tracking, and returns. Supporting over 1 billion shipments annually across 190 countries, nShift empowers companies to drive growth, increase operational efficiency, and deliver exceptional customer experiences - trusted by many of the Nordics' most recognizable retail brands as well as leading global enterprises."

Filip and Anna on ...

how AI will impact checkout in the coming years

Filip: "AI will transform the checkout experience in a very tangible way over the coming years. We're already seeing how data is being used to make every delivery choice intelligent – for example, by dynamically recommending the most sustainable, fastest, or most reliable option based on customer behavior, location, time of day, and past preferences. At the same time, AI will automate real-time communication: ETA updates, notifications, and customer interactions will happen directly within the checkout, without the customer leaving the flow. This makes the purchase experience more intuitive – less friction, more trust. But perhaps most exciting is that the concept of checkout is being redefined. It will remain primary, but not always central.

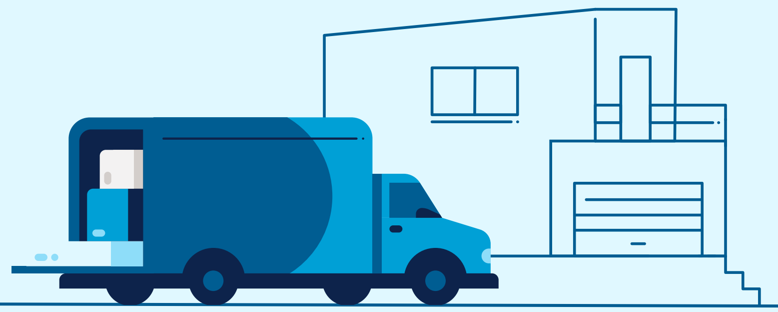
We're moving toward agentic commerce, where AI agents and intelligent systems act on behalf of the customer: they initiate purchases, manage deliveries, and make decisions based on preferences and history. The purchase then becomes not a single point in the flow, but part of an ongoing conversation between the customer, the brand, and the system.

For us as a platform, it's about embedding that intelligence in a way that feels natural, secure, and transparent. Checkout will no longer be the end of the customer journey but a seamless part of a more dynamic and personalized shopping experience."

Anna: "We believe AI is already having a transformative impact on the checkout and the broader e-commerce experience. Given the rate of AI innovation, even projecting a year ahead is difficult. For platform developers such as nShift, AI creates new opportunities to empower retailers with smarter tools, deeper insights, and intelligent automation that help them optimize operations, personalize delivery options, and grow their business.

On the consumer side, a paradigm shift is already underway. With innovations like OpenAI's Atlas – essentially a web browser with an AI companion built in – we are entering an era where shoppers can discover, evaluate, and buy products directly through conversational AI – effectively 'buying through chat'. AI is handling product research, comparing offers, and guiding consumers through a frictionless, voice- or text-driven checkout experience.

We believe the impact of AI will also depend on the type of product. For some categories, discovery is part of the enjoyment - the experience of browsing, comparing, and finding that 'just right' item will remain essential to the shopping journey. In contrast, for everyday or disposable items, AI will take a more active role – doing the research and streamlining the purchase."



Filip and Anna on ...

how the Nordics differ from the rest of Europe when it comes to delivery solutions

Filip: "The Nordics are far ahead in transparency, traceability, and trust. Here, customers prioritize reliability and clarity, while in Southern Europe speed and price still dominate.

Nordic e-commerce businesses and platforms have a strong tradition of building trust throughout the customer journey, which means we often have higher expectations for precision and customer service.

At Quickbutik, we see this as a strength. Our market is mature enough to demand innovation, yet small enough to test and adapt quickly. This makes the Nordics one of the most exciting regions in Europe right now when it comes to checkout and delivery experience – a place where technology, transparency, and trust truly come together.

The next step is to take that experience beyond the Nordics. We want to show that the Nordic model for e-commerce – where simplicity, sustainability, and customer focus go hand in hand – can become an international benchmark."

Anna: "The Nordic region has long been at the forefront of logistics innovation and consumer expectations. A defining feature is the widespread use of parcel lockers and pick-up points, which have been deeply embedded in consumer behavior for years. The region's high digital maturity and frequent online shopping have accelerated demand for convenience, visibility, and control. Consumers increasingly expect faster, more flexible delivery options, including evening and weekend services, precise time windows, and real-time tracking. Compared to much of Europe, where home delivery still dominates, the Nordics stand out for their diverse and well-developed delivery ecosystem – combining home, out-of-home, and omnichannel return options that give customers genuine choice at checkout."

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> **Filip Egger**

> "Consumers increasingly expect faster, more flexible delivery options"
> **Anna Norstedt**

PostNord – a partner for e-commerce

PostNord exists to make everyday life easier. For consumers, this means flexibility, no matter where you are. For e-tailers and other senders from all over the world, we offer a simple and smooth route to the Nordic region and its 24 million consumers.

We prioritize sustainability in our offerings and operations, aiming for fossil-free transportation and operations by 2030. In 2023, PostNord Sweden was the first company to achieve Nordic Swan Ecolabel certification for e-commerce logistics, reflecting our dedication to sustainability.

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