

Global Online Luxury Goods Market: Trends and Opportunities (2014-2019)

November 2014



Global Online Luxury Goods Market

Scope of the Report

The report "Global Online Luxury Goods Market: Trends and Opportunities (2014-2019)" analyzes the online luxury goods market, its development, market segments and penetration of the online channel in the sales of luxury goods. The mature markets of America and Europe along with emerging markets of China, Japan are discussed in the report. The major trends, drivers facilitating growth of the online luxury goods market as well as the issues being faced by the industry are presented in this report. The three major players in the online luxury goods industry - YOOX, ASOS and Zalando are profiled and their key financials and strategies for growth analyzed in the report.

Country Coverage

- ⊕ Americas
- ⊕ Europe
- ⊕ China
- ⊕ India
- ⊕ Japan

Company Coverage

- ⊕ YOOX Group
- ⊕ ASOS Plc Holdings
- ⊕ Zalando

Executive Summary

The e-commerce channel in luxury goods sector is gaining importance and has recorded consistent growth over the past few years. With technological innovations, more luxury shopping websites are emerging that is allowing luxury fashion brands to reach more customers through online platforms. Factors contributing to the growth of online luxury goods sector include wider selection of products offered on the web, growing perception of web as a safe place to make purchases and the search for convenience.

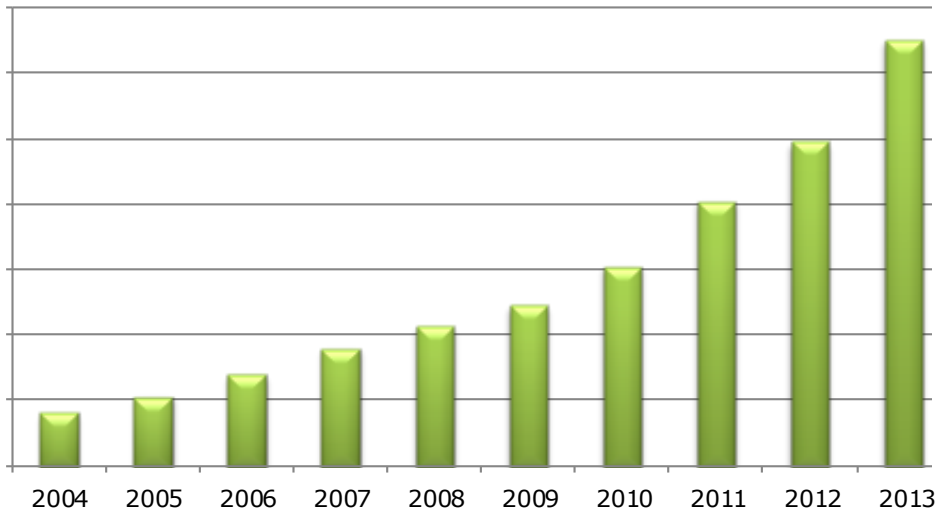
While online luxury spending accounts for a small percentage of total luxury spending, the trend towards an increase in the number of internet users and people completing orders online together with the higher average annual expenditure per user will boost market growth in future years. In addition, the shift towards emerging markets becoming big spenders on luxury is assumed to have great impact on online luxury goods sector.

A growing number of fashion, design and luxury companies are considering it as a platform for brand building. Furthermore, the possibilities of social networking platforms like Facebook allow for more personalized and individualized communication with consumers. By category, accessories constitute the largest portion of luxury goods that are sold online followed by apparel, beauty products and hard luxury. YOOX, Zalando, ASOS, Blue Nile, Amazon are main players operating in online luxury goods sector.

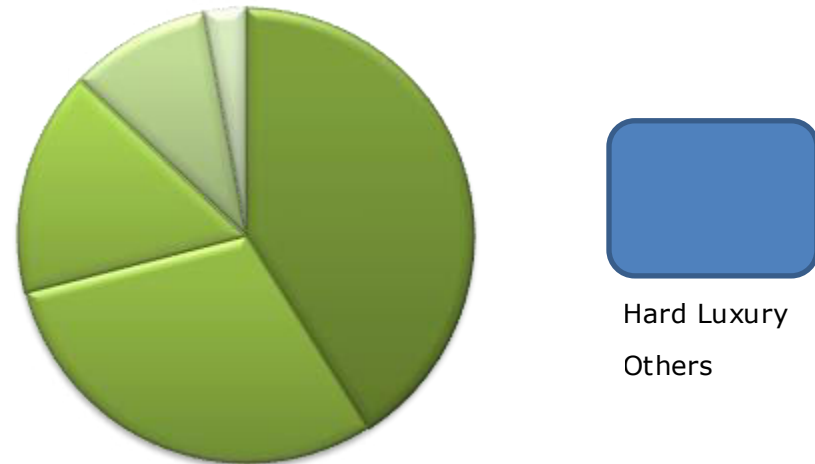
Global Online Luxury Goods Market: An Overview

The online retail channel for the sales of luxury goods has been recording a notable growth, chiefly with the rising dominance of the Internet as a one stop-shop solution for the buyers. In 2013, the online revenues of the global luxury goods segment reached US\$.... billion or EUR....billion, which was around% higher than US\$.... billion or EUR..... billion in 2012.

Global Online Luxury Goods Market in US\$ Billion, 2004-2013



Share Online Luxury Goods Market by Category in %, 2013

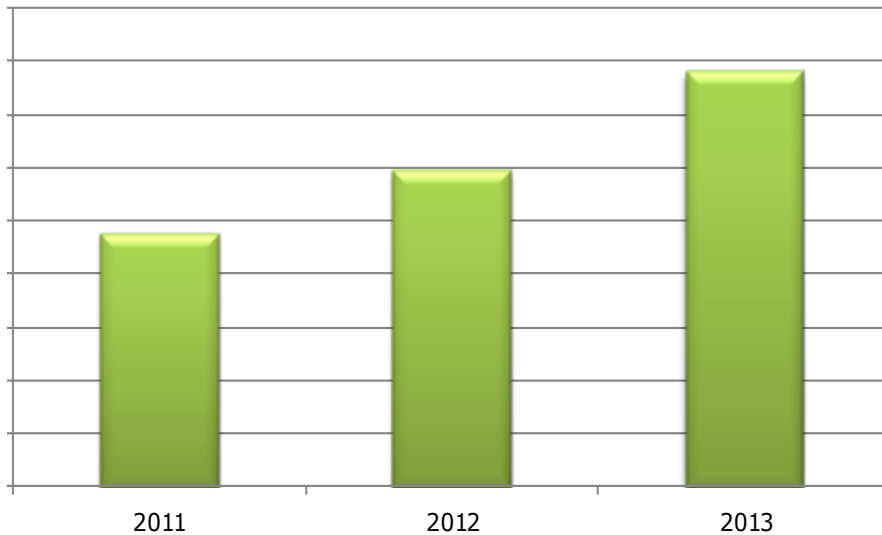


- By category, accessories constitute the largest portion of luxury goods that are sold online i.e%. Apparel is the second largest segment with a share of around% in 2013 followed by beauty products and hard luxury goods at% and% respectively.

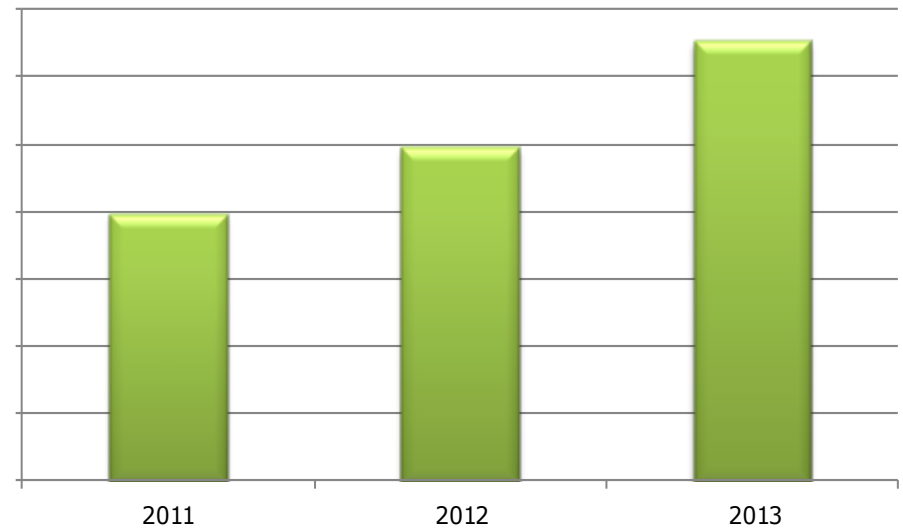
Regional Analysis – Online Luxury Goods

The overall personal luxury goods market in American region increased from US\$... billion in 2011 to US\$.... billion in 2013. The market is projected to grow further by ..%-...% over the coming years. The US is the largest market within this region with a market size of US\$... billion in 2013.

Americas – Online Luxury Goods Market Size in US\$ Billion, 2011-2013



Europe – Online Luxury Goods Market Size in US\$ Billion, 2011-2013



- Europe is the core market for luxury goods and accounts for ...% of the global luxury goods sales as of 2013. The rising number of tourists visiting Europe is a key factor to drive the regional luxury market. During 2013, Europe recorded US\$.... billion worth of luxury sales.