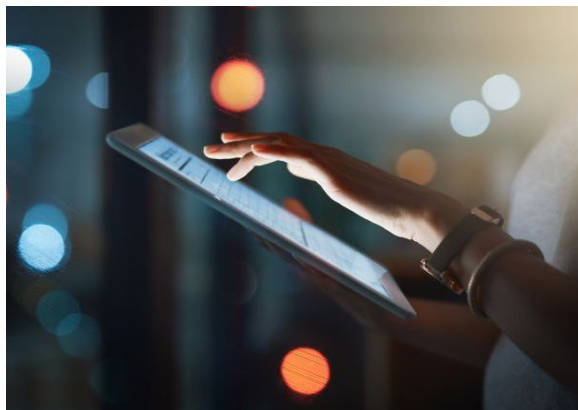


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“COVID-19 has had a major impact on the e-commerce sector, providing growth for large elements of the B2C market and more challenging conditions in the much larger B2B market. While there are questions over whether the pandemic has permanently changed consumer behaviour to boost the market, the future for the B2B sector is more dependent on the recovery in the economy.”

– Terry Leggett, Senior Analyst

This report looks at the following areas:

- The fundamental differences in the impact of COVID-19 depending on the sector
- The significant further potential for e-commerce development
- The wide variation in approaches to the market
- The variation in activity between large and medium enterprises and SMEs

The variations in e-commerce activity impacted by COVID-19 have been extreme. On the one hand retail sales have grown by more than 40%, while the impact on the accommodation and food service sector has been to cause a decline of a similar level.

Within the B2B e-commerce sectors there have been strong, if slightly less significant, fluctuations, with most sectors declining as a result of the disruption in the end-use market. The manufacturing and transport/logistics sectors have been at the forefront of the difficult conditions in 2020.

As the COVID-19 restrictions are eased, then so the market will return to growth, and the development can be expected to exceed that of the wider economy. There will continue to be a slow trend towards the less developed website sales while modest growth will return for the EDI activity as industrial and commercial activity returns.

With less than 11% of companies currently engaging in e-commerce, there would appear to be a substantial opportunity for the wider use of the channel, though in practice many parts of both the B2B and B2C sectors offer services or products that have limited opportunity. Nonetheless, e-commerce in the B2B sector is destined to grow above the levels of the wider economy as digitisation remains a key feature of the economy, boosted by the challenging conditions posed by the pandemic.

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