

# Elite1000

RXTUN22RP



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**SHOPTALK**  
EUROPE

**Global**

**2022**

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# FROM THE EDITOR-IN-CHIEF

Welcome to the RetailX Global Elite 1000 report. For this publication, the RetailX team has investigated the retailers and brands representing the best-of-the-best globally.

They set out to discover not only those retailers and brands that are leaders in their domestic market or reach into neighbouring countries with cross-border trade but those that have significant heft in multiple regions or large businesses across the world and a global customer base.

It wouldn't be RetailX if we didn't look at the web traffic and digital capabilities. The days of putting up a website and expecting customers to come are past. Today digital is a major part of retailing and is entwined within the structure of organisations so web traffic shows the reach of marketing and brand awareness among global consumers. It also gives a gauge of retail maturity cutting down a list of the world's retailers to those who understand online and mobile shoppers.

Congratulations firstly to all of the retailers and brands that made it to the shortened global list by virtue of their web traffic. They are already leaders in at least the region where their headquarters is located.

To fully appreciate the global leaders and understand what makes retailers in the RetailX Global Elite 1000 stand out, RetailX analysis goes further, with additional measures around financials and omnichannel capabilities. For companies ranking as Elite or Leading they are at the top of their game in their own region as well as in other parts of the world having scaled operations, listened to customers and localised to different markets, cultures and languages.

Omnichannel retailers, pureplays and marketplaces, along with global brands that have moved to sell direct to customers all make it into the final ranking. They come from all areas of the world, although the majority are headquartered in Europe and North America. The large number of Northeast Asian companies making it onto the list and the expanse of Alibaba's business throughout the world are interesting to see.

Finally, congratulations to all of the retailers and brands in the final 1000 ranking and especially to the six ranking as Elite – Apple, Zara, Carrefour, Dm, Leroy Merlin and Rewe.

**Ian Jindal, CEO & Editor-in-Chief**

# ABOUT THE RETAILX GLOBAL ELITE

Web traffic only reveals part of the picture when analysing the Global Elite

Ask anyone to name the leading retailers and brands in the World and you'll soon come up with a list of household names. Delve deeper, though, and analysis of the figures starts to show some surprising leaders, while other names drop away. For example, Coca-Cola is a major global brand but when it comes to web traffic, its D2C sites don't rank high enough to count reasonably in a global listing. Yet there is no denying its marketing reach as a brand, nor its sales volumes.

From the point-of-view of web traffic, there are some brands and retailers which are well-known leaders in their own countries. Others have expanded their business to neighbouring countries, starting usually with a few bricks-and-mortar stores or shipping online orders across borders. Becoming a regional leader is a feat in itself and not something to denigrate. For the sake of this report and the breadth of its analysis, RetailX researchers have split the world into ten regions. These are: Africa, Southeast Asia, Australasia, Europe, Latin America and the Caribbean, Middle East, North America, Northeast Asia, South Asia and Rest of the World.

Just two companies – Amazon and Microsoft – are among the largest 15 retailers by web traffic in every one of these ten regions. It is an exclusive list and even looking at multiple regions, there are only 14 retailers and brands with such large levels of consumer web traffic that they rank as one of the largest 15 in more than one region.

All of the companies in the largest ten ranking are relatively new businesses, having been established in the digital age. The only exception is French supermarket group Carrefour, which has invested heavily in digital as well as innovating with multiple formats and channels across a number of different regions. Carrefour is among the leaders in three different regions assessed by RetailX.

Web traffic gives a good starting point when analysing the global heft of a company, especially for RetailX with our digital-first perspective, but it doesn't make for a sustainable business on its own. Factors such as company turnover, online and

offline revenue, channel mix and store estate give a much better picture. RetailX takes all of these measures into account when analysing whether brands and retailers make it into the RetailX Global Elite 1000 and further assessing where in the ranking each should be placed.

All of the retailers and brands included in the RetailX Global Elite 1000 ranking have grown to a point where they rank within the top 15 in at least one region and rank as largest by web traffic in multiple regions.

Congratulations, therefore, to Apple and Carrefour, the two retailers ranked as Elite in the RetailX Global 1000 and within the largest 15 by web traffic in multiple regions. Congratulations also to the other retailers ranking as Global Elite – Zara, Dm, Leroy Merlin and Rewe.

## WHERE THE LEADERS ARE BASED

The next few pages will break down the Global Elite further, highlighting how brands make up almost two-thirds of the listing, compared to retailers – 349 make it into the ranking.

Fashion and consumer electronics are sold by the most number of retailers and brands, with 24.4% of companies within the Top500 selling fashion items and 21.4% selling consumers electronics.

Multi-sector stores account for almost as many, with 23.9% of the Top500 selling items from multiple categories. These stores also account for the largest share of web traffic from consumers.

More than three-quarters of the traffic to the Top 1000 goes to multi-sector stores, with 61.4% of all consumer traffic going to members of the Global Elite 1000 based in the US. Such is the dominance of retailers in North America.

Analysing this further, traffic going to retailers in North America from other regions is almost 27 times higher than the traffic going out from North America to retailers headquartered in other regions.

The majority of the Global Elite 1000 are based either in the mature ecommerce markets of the North America or Europe.

WHAT MAKES A GLOBAL COMPANY?

There are commonalities across the Global Elite which are further examined in this report's case studies. In short, common themes across this group of retailers and brands include:

- A founder's vision or strong sense of direction within the business
- Localised marketing
- Understanding customers through insight and analytics, data and AI
- Customer-centric operations
- Moving with the times. In 2022, this means being transparent and responsible as a global player around issues including sustainability and diversity
- Not being scared to innovate, to disrupt industries or change people's lives for the better
- Investment and acquisitions for growth along with a test and innovate mentality

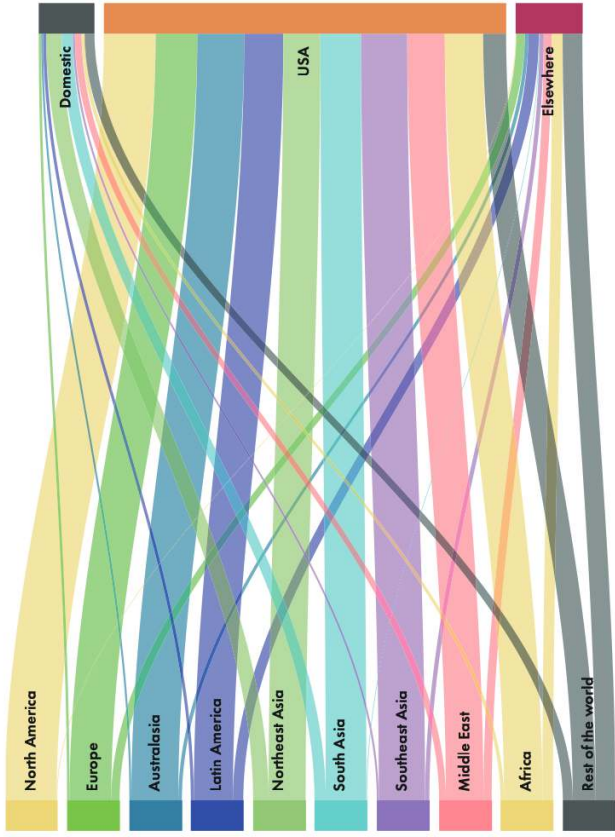
Looking at the sites of the Global Elite and the functionality, services and experience, there are areas common to all and some that have seen increased investment since February 2020. Merchandising, returns and mobile sites have all improved in the last couple of years. There are variations across regions but globally, product information, visual appeal and search relevance have all improved.

For example, autoccomplete dropdown on mobile sites is functionality that appears on 76% of Global Elite sites. This has increased from 72% in 2020. The ability for consumer to see the level of stock held in store has also increased over that time – 52% of DIY stores and 42% of retailers selling beauty and cosmetics include it. DIY stores are also the most likely to offer collection and provide details of how to find stores.

Pre-paid returns are offered by 44% of 265 of the Global Elite retailers and brands measured in February 2020 and for this report. In 2020, just 31% offered pre-paid returns.

Flow of consumer web traffic towards domestic/foreign retailers

The consumer web traffic of a region (shown in the left) towards its largest 10-15 retailers is connected with those retailers' HQ locations (in the right)



Source: Retailx, drawing on data from Statista

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TOP 1000

| ELITE             | TOP 100             | TOP 150          | TOP 250           | TOP 1000              |
|-------------------|---------------------|------------------|-------------------|-----------------------|
| APPLE             | ARGOS               | UNDER ARMOUR     | BRICKLINK         | KOMPLETT              |
| ZARA              | ETSY                | TAOBAO           | ALZA              | SHARKET               |
| CARREFOUR         | STEAM               | FOSSIL           | LENOVO            | DBI                   |
| DM                | HARVEY NORMAN       | AJD              | YAHOO SHOPPING    | BREITBART STORE       |
| LEROY MERLIN      | COTTON ON           | BEST BUY         | AMERICAN AIRLINES | GROUPON               |
| REWE              | X-KOM               | VINTED           | WUOLU             | RICARDO               |
| C&A               | SHEN                | VITALSOURCE      | SONY              | & OTHER STORES        |
| SEPHORA           | ALIEPRESS           | WILDBERRIES      | ESET              | VERZON                |
| DECAHLION         | SCREENIX            | TRENDOL          | SAW'S CLUB        | COPART                |
| NEXT              | THOMANN             | SCRIBD           | NEWEGG            | JOHN LEWIS & PARTNERS |
| GUCCI             | ZENDESK             | AUTODESK         | BAUHAUS           | ZULUY                 |
| MANGO             | SERSE               | GAP              | ZEKEMAIN BE       | VISHPRINT             |
| ALBERT HEIJN      | CEX                 | DJI              | MEDIA MARKT       | MENARDS               |
| TARGET            | ASICS               | FIJIBIT          | XBOX              | COOLBLUE              |
| AUDIAS            | SHOPEE              | DVOR             | JOJO              | INDIA                 |
| GARMIN            | DIGITEC             | OTTO             | THE RANGE         | END.                  |
| AMAZON            | HERNÉS              | EMAG             | JIB               | FOREYER 21            |
| DECHMANN          | CONFESSE            | DELL             | HERB              | MONDI                 |
| FNAC              | SNECHERS            | LOWE'S           | KIABI             | SWAROVSKI             |
| HEA               | NEW BALANCE         | CODECANYON       | REYERB            | PONS HALLO WELT       |
| NIKE              | WALMART             | NEST             | ADORAMA           | NEW LOOK              |
| MICROSOFT         | MERCADO LIBRE       | AUTOCOUT24       | PANDORA           | AMANDANO              |
| SPORTS DIRECT.COM | JUNO                | ATLASIAN         | ROZETKA           | PRON                  |
| STRAIDVARIOUS     | CURRY'S             | TCHIBO           | AVON              | CLAS OHLSON           |
| MICHAEL KORS      | B&H PHOTO VIDEO     | BONPRIX          | TAYLOR & FRANCIS  | UTIA                  |
| LOUIS VUITTON     | WISH                | RAZER            | EVIECCOM          | RENIK.BG              |
| RITY EURO AGD     | CHEMIST WAREHOUSE   | QVC              | MESHOX            | BIT DEFEENDER         |
| THE GOI DI DONG   | TK MAXX             | KEDMART          | MICHAELS          | MADE                  |
| ORSONY            | RAKUTEN             | CELLPHONES       | MISSGUIDED        | YASU                  |
| ACE HARDWARE      | ZALANDO             | LAZADA           | NASTY GAL         | ASDA                  |
| EMPIK.COM         | NOTEDBOOKS.BILLIGER | AUTOTRAIDER      | HOUSE OF FRASER   | CHEWY                 |
| CASTORAMA         | EPIC GAMES          | DISCOUNT         | MEDIA EXPERT      | LACRYTRALE            |
| BOOTS             | PRADA               | FARFETCH         | THE NORTH FACE    | BOSE                  |
| MÜLLER            | SUPREME             | DAN MURPHY'S     | WONDERSHARE       | LOBIT                 |
| MUJI              | SUPERCHEAP AUTO     | RESERVED         | AUCHAN            | BESTSECRET            |
| EBAY              | GNC                 | SUPERDRUG        | HOLLISTER         | AUCTION               |
| SAMSUNG           | COUPANG             | SCARQUITZ        | LA REDOUTE        | ROSSMANN              |
| OTSHO             | MICRO CENTER        | BANG GOOD        | DNS               | DEPOP                 |
| HOT TOPIC         | ALIBABA.COM         | HOME CENTER      | URBAN DICTIONARY  | BUYEE                 |
| BRICO DÉPÔT       | KATE SPADE          | BOUYGUES TELECOM | SHUTTERFLY        | HOANG HA MOBILE       |
| NORAUTO           | MLB SHOP            | CENTRAL          | INTERSPORT        | EDBOWIE.PL            |
| HP                | FASHION NOVA        | PIUMA            | GOG.COM           | SAINSBURY'S           |
| NESPRESSO         | KOMUS               | HORNBACH         | ACTION            | XXLOUTZ               |
| COSTCO            | SPOTLIGHT           | HOZZ             | WEST ELM          | FLUPKART              |
| GOOGLE PLAY       | TIMALL              | ANTHROPOLOGIE    | YESSTYLE          | BOOKDEPOTSTORY.COM    |
| EUBONICS          | BOL.COM             | KOHL'S           | CLEANER           | DHgate.COM            |
|                   | WAYFAIR             | GZAL.COM         | TOPPIUS           | EL CORTE INGLES       |

TOP 1000

|                            |                            |                   |                      |                     |
|----------------------------|----------------------------|-------------------|----------------------|---------------------|
| SMYTHS TOYS                | KEAP                       | MAIL              | DROPS DESIGN         | BUILD               |
| UMANGO                     | STORE.BG                   | HOLLAND & BARRETT | ADVANCE AUTO PARTS   | XXL                 |
| BCE                        | GUNBROKER                  | ASHLEY HOMESTORE  | DSW                  | VITERA              |
| DOUGLAS                    | RUTEN                      | TEPBUBLIC         | BOOMYS.COM/TV        | WAITROSE & PARTNERS |
| WORTEN                     | GETADDER                   | FLYER ALARM       | COFFEL               | GOPRO               |
| WILDO                      | HUGO BOSS                  | MEDIMOPS          | WESTERN DIGITAL      | SENJUKA             |
| APTEKA                     | HOMER24                    | ROSETTA STONE     | POTTERY BARN         | ETAM                |
| THREDUP                    | INSTANTGAINING             | TOP 500           | OZ                   | HARRODS             |
| AIKRO                      | WOODWORTHS                 | PROZIS            | KRUIDVAT             | DO TERRA            |
| CITILINK                   | B&Q                        | BIKE DISCOUNT     | BIKE DISCOUNT        | GAMMA               |
| HEWLETT PACKARD ENTERPRISE | SHIM-LAND                  | TICKETMASTER      | LOFT (CLOTHING)      | JACQUE LANSOM CARDS |
| BOUJANGER                  | BATH & BODY WORKS          | GUSTO             | PACSUN               | SCAN                |
| ALTERNATE                  | CZC.CZ                     | APOTELASE         | THALIA BUCH & MEDIEN | BODYBUILDING        |
| SKATURN                    | LOGITECH                   | BOOZTCOM          | THE FITBOOKS         | ZAFUL               |
| ENEX                       | ZAZZLE                     | DARAZ             | OPONEO               | SEARS               |
| CANADIAN TYRE              | SPRING                     | MORELE.NET        | VESTIARE: COLLECTIVE | EDDIE BAUER         |
| TMON                       | CHANEL                     | BIKESTER          | CASEIFY              | GENERAL ELECTRIC    |
| DE CAMPE                   | CARDIO                     | SQUARE            | ALLSAINTS            | CHOTOT              |
| CONRAD                     | UNICURO                    | ONEPLUS           | GWSHARK              | NITOR-NET           |
| ELEGANTEN                  | SPORTCHECK                 | AUTOCONE          | MOUSER               | REBUY               |
| MATCHES FASHION            | SPECIALIZED                | SPREADSHIRT       | DUNELM               | SALLY               |
| CHAIN REACTION CYCLES      | CONFORAMA                  | PETCO             | DEFANAN              | ZOLA                |
| TIKI                       | FERKIT                     | SWEETWATER        | REVZILLA             | ORIGIN              |
| SELFPROGES                 | ROMWE                      | LEDC              | DIGNEY               | PALAGONIA           |
| CANYON                     | LIVERPOOL                  | HEMA              | BEAUTY BAY           | PCCOMPONENTES       |
| PRETTYLITTLETHING          | GRAILED                    | MINIFACTORY.DE    | GGANITI              | NET PNCER           |
| ANVEDO                     | TAKEALOT                   | CALZEDONA         | NATIVE INSTRUMENTS   | BUT                 |
| WEIGHT WATCHERS            | BOOTH                      | SPARTOO           | BARNES & NOBLE       | OSCARO              |
| TOOLSTATION                | PARADOPAZA                 | WINTRA            | EXOT.RU              | NOVIA               |
| WINTERDO                   | BACAMARKET                 | SPREZDALENY       | PGOLIT               | AMERICANS.COM       |
| MONODARO                   | AMN                        | AUDO              | CABELAS              | MYTHERESA           |
| ALAWAY                     | OVERCLOCKERS.UK            | ABOUTYOU          | GALAXIS              | CASERINDE           |
| BUYMA                      | DYSON                      | MADEINCHINA       | BREUNINGER           | BACKCOUNTRY         |
| GOODWILL                   | COVINTENTE                 | EXPRESS           | PODGA                | FRAGRANCE.NET       |
| DAT 3D                     | GEARBEST                   | QOOID             | WOOT                 | DOCHOURIS           |
| LOOKFANTASTIC              | CRUNCHBASE                 | WOOT              | BIGBADTOSTORE        | MR PORTER           |
| AREDOXYS                   | PRADIS                     | ACTR              | BLANCHPORTE          | HALFORDS            |
| ESSELINGA                  | FERTDAY                    | JOMIA             | BILBU                | RECFEET ELEKTRONIK  |
| INTERMARCHÉ                | KÄRCHER                    | DEIMR             | DEBIENORF            | EDMUNDS             |
| ARQUESO                    | SUBUGAYA                   | SOCETYS           | SAMS 5TH AVENUE      | NETGEAR             |
| POINTOWN BY GAO            | HARBOR FREIGHT             | CUSTOMINK         | DOLLS KILL           | ELKOP               |
| STAPLES                    | ASDUL                      | AROMA.ZONE        | BIKE-COMPONENTS      | SHAFIA              |
| KITCO                      | EASIS                      | GPM               | UTST                 | MATAJAN             |
| BEAPORT                    | BAUR                       | TROVAPREZZO       | HELLO SIGN           | ORVIS               |
| DICK'S SPORTING GOODS      | SUMMIT RACING EQUIPMENT    | WEKAMP            | OSTALEE              | LINMASTER           |
| YOUNGLIVING                | BKEZ4                      | HEB               | CARTER'S             | MOHITO              |
| DARTI                      | JOAN                       | JULA              | BR.CO PRIVE          | ASHAMPOO            |
| ARTIZIA                    | PANASONIC MARKETING EUROPE | VANS              | SYSTEM BOLAGET       | GAME                |
| FALABELLA                  | ANYPOTEN                   | EPICENTRK         | EMP                  | BOOKLOOKER          |
| DEUTSCHE TELEKOM           | MEFA-PORTER                | HSN               | MEDPEX               | CORATE & BARREL     |
| 3 DSKY                     | NEWCHIC                    | GITTIIDIDIOR      | ZENNI OPTICAL        | JOMASHOP            |

TOP 1000

|                                |                           |                          |                                     |                  |
|--------------------------------|---------------------------|--------------------------|-------------------------------------|------------------|
| INTERMARK                      | WIEBER                    | HY YEE                   | DAVID JONES                         | PRIMARK          |
| CYBER LINK                     | E-SHOPGR                  | PETROVICH                | MARTINUS                            | KARWEI           |
| TOP 1000                       | BORN2BE                   | GEO ONLINE               | FABRIAD XXL                         | FOOTWEAR         |
| MITOYS                         | NEODINET                  | SODIAC                   | COMPUZONE                           | PACKET           |
| ADLIBRIS                       | EVERLANE                  | WELTBUD                  | EE                                  | GYDENAL          |
| GILT                           | COMPJTERUNTERSE           | ULINE                    | KOMPUTRONIK                         | TE               |
| PETSMART                       | RAY-BAN                   | ANALOG DEVICES           | HUBO                                | FRUIGO           |
| TRACTOR SUPPLY CO.             | PICARD                    | PROSHOP                  | DE GROUYER                          | LAMPS PLUS       |
| MACMASTER-CARR                 | EXPERT                    | AU                       | TABLETICS                           | PAULAS CHOICE    |
| THE OUTNET                     | EXTREME DIGITAL           | WINZI?                   | STOP&SHOP                           | COOP (SE)        |
| VIVINO                         | JB W-FI                   | SSG                      | KITPURDUR                           | PB TECH          |
| BUTEANA                        | CULT BEAUTY               | EDIEKA                   | SUNLIGHT                            | KIEL & COMPANY   |
| ALL TRICKS                     | AMERICAN KENNEL CLUB      | COLORPOP                 | MERCADONA                           | STYALNOY         |
| CORSAR                         | CASA DEL LIBRO            | ROMA                     | LEEN BAKKER                         | MORPHO           |
| SNYKY                          | ANGROS                    | MAMON D RECT             | HÖFNER                              | FASHIONPHILE     |
| LIVE AUCTIONEERS               | TORRID                    | MAGAZINE LUZA            | BEGFREUNDE (ALPINE TREK, ALPINISTE) | EXCHANGE         |
| KAUFE                          | BILKA                     | THE CONTAINER STORE      | BUCHER DE                           | FRYPRICE         |
| ANN TAYLOR                     | COON                      | SENDO                    | MATERIEL.NET                        | N-TANO           |
| ALAIN                          | HELLOFRESH                | POCO                     | LOTTE HOME SHOPPING                 | FLOOR & DECOR    |
| WATERSTONES                    | NUSSEN                    | GALERIES LAFFAYETTE      | CHIP DIP                            | HARRY & DAVID    |
| WIGGLE                         | ICELAND                   | FLACONI                  | NORTHERNTOOL                        | BUY BUY BABY     |
| BOW                            | ALTEX                     | HARRIS TEETER            | JOSHINWEB                           | MODCLOTH         |
| PULIGN ROUTIQUE                | ANDERTONS MUSIC           | ACTIVE                   | AD                                  | SHOPS'VILLE      |
| INET                           | CFBRYPORT                 | FLO                      | PREMIUM BANDAI                      | MEDIKAMENTE      |
| ONLINETRADE                    | KWART                     | COLUMBIA SPORTSWEAR      | DOSPARA                             | OB DESIGN        |
| BASS PRO SHOPS                 | WELLY.COM                 | PRINCESS POLY            | APITAL                              | GO SPORT         |
| YES24                          | B.OEKER                   | WICKES                   | KSP                                 | FINISH LINE      |
| AMOTIVEST                      | GLASSONS                  | CRUTCHFIELD              | BRICO                               | AMICROMANIA      |
| DEVEPRESS                      | OPTICPLANET               | WILLIAMS SONOMA          | PLANSIA                             | TICKETONE        |
| CCKEPEITI                      | STEELESERIES              | NOCIBÉ                   | WABBY PARKER                        | PAN'S CENCOSUD   |
| EYE BUY DIRECT                 | THE DESIGN STORE          | DOSHAWA                  | ALMODERN                            | CEL              |
| ROOMS TO GO                    | EROKKA                    | H-KING                   | PRIVATE SPORTS SHOP                 | BAX MUSIC        |
| AMARO                          | MADEWELL                  | APPSUMO                  | VERY                                | APOTHEKE         |
| PHOTOBOX                       | BIGL                      | WICKES                   | BRACKCH                             | SFD              |
| BEDROCKA                       | HOFF                      | NATURE & DÉCOUVERTES     | FAMITAL                             | NTRADO           |
| PEARL                          | KOTSIOVOLOS               | DEHAIZE                  | COST PLUS WORLD MARKET              | THRIVE MARKET    |
| MANDARAKE                      | WIKI                      | ICR                      | CHRISTIAN BOOK                      | EXTRA            |
| TALBOTS                        | HOBBS&SCARH & ELECTRONICS | UNIO                     | FRY'S                               | OLIE OIE         |
| CANADA COMPUTERS & ELECTRONICS | BUNNINGS                  | EVGA                     | MONBELL                             | CHEBRAUI         |
| PLANSIO                        | BIG LOTS                  | ELECTRO DEPOT            | TECUNIQUE                           | CHENBELL         |
| LABIRINT                       | RUE DU COMMERCE           | REAL CANADIAN SUPERSTORE | BOYNER                              | AMER             |
| FAMUTICS.COM                   | THE FAME                  | TOPACHAI.COM             | SPORTMAN'S GUIDE                    | EBERH            |
| BRECKMAN                       | THE CHILDREN'S PLACE      | SIGNIPERNUS              | SUPERBALIST                         | TORANOMA         |
| NOON                           | MANAGE ENGINE             | DOZ.PL                   | ARDOINE                             | KOSTAFF          |
| OAKLEY                         | PUBLIC GR                 | SYST.ME                  | AZTEL                               | LOHACO           |
| TCPLAYN, INC.                  | DOLLAR TREE               | WOOX                     | UPDATE STAR                         | NX               |
| AMWAY                          | FEU VERT                  | SPONFLOWER               | MR BRCOLAGE                         | FINE ART AMERICA |
| LIVERPOOL FC                   | SHOPBOP                   | GFI                      | E-COLLETT                           | HAROLD WYDORG    |
| MONOPRIX                       | ZIVEK                     |                          | COULCAL                             | COOLER MASTER    |
|                                |                           |                          |                                     | PANFREDZOFF      |
|                                |                           |                          |                                     | CYBER PUERTA     |

|                     |                      |                      |                             |                   |
|---------------------|----------------------|----------------------|-----------------------------|-------------------|
| ORIENTAL TRADING    | TOWER RECORDS ONLINE | ELIM SHOP            | DOLLAR GENERAL              | MADERAMADERA      |
| MONOP/G             | PRIMAVERNA           | VIPSHOP (VIP.COM)    | DECIFFE                     | CATCH             |
| MARTHA STEWART      | BLOCK                | GLOBAL INDUSTRIAL    | PEER                        | TECHNO DOM        |
| ADVICE              | EASTBAY              | WELL CA              | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| KABUJI              | KABUJI               | SWANSON VITAMINS     | BIG BASKET                  | REVIVER SOFT      |
| LOCONDO             | AMJAH                | INCE HESAP           | DANGANG                     | THE GOOD GUYS     |
| RO ELECTRONICS      | CENAURO              | BUDS                 | GLOBAL SOURCES              | ANDI              |
| BEAMS               | FELISSIMO            | PINPROCK             | GENERAL ELECTRIC COMPANY    | ELDO              |
| GEMO                | VENUS                | PHONE                | DR MAX                      | TATA CLIQ         |
| SCHIELS             | GREENBYING           | PCSTORE              | CLASSIC FIREARMS            | T-SUN             |
| APWERSOFT           | COOP (CH)            | OFFICEWORKS          | NOEL LEEMING                | SHOP              |
| ROCKLER             | APMEX                | MERRELL              | PONTO                       | DARIKADE          |
| LAPELREINELLI       | AUDUSTO              | AND TOWLS            | AND TOWLS                   | STEPHANS          |
| OSTIN               | ANDVISAR             | VICTORIAN PLUMBING   | HANSEM                      | FC MATTES         |
| RBT                 | SHOP CHANNEL         | DIHOLIC              | ANY SHOP                    | TAK SHOP          |
| MELONBOOKS          | PAIROL BASE          | FOXTROT              | BIG BANG                    | REINTEGRALAGERINN |
| ICONIC THE          | BOOSTMOBILE          | MIGHTY APE           | ESTANTE VIRTUAL             | KULIMALL          |
| LAPTOPS DIRECT      | HALLMARK             | NET OFF              | SURMARINO                   | MEGADAD IT        |
| TIME 4 LEARNING     | T-MOBILE             | ROTITA               | GRIN                        | TOLUUSTINN        |
| DE-FACTO            | MATIAS               | MEKUR                | SHOPTIME                    | KASH KZ           |
| KRETEL              | SUNING               | KONGEZ               | NEW AUCTION                 | LENSKART          |
| NETSHOES            | BROCK'S BROTHERS     | MUSCUM'S FRIEND      | FIRST CRY                   | SNAPDEAL          |
| LETOILE             | JARRR                | MYER                 | SOUISOFT                    | CITY CENTER       |
| DESIGNROOM          | THE VITAMIN SHOPPE   | RUNNING WAREHOUSE    | JAPANESE FUTSAL ASSOCIATION | BD SHOP           |
| PAPERLESS POST      | CLAROSHOP            | DICKENSNOCHI         | KOGANI.COM                  | OFERTA SMPLE      |
| SKYTECH             | DINOS                | QUILL                | WALL                        | AKESIDEAL         |
| SANIT DISCOUNT      | MAXIDOM              | GO OUTDOORS          | PC FACTORY                  | LIBUY             |
| ELECEBIC            | CECILE               | HERO FORGE           | FOTOSOLAD                   | DESERT CART       |
| JOSSE & MAIN        | BRILLIANCEPARTS      | DALLAS COMBOYS       | KONGKA                      | YASHIRY           |
| TULRU               | CASAS BAHIA          | EVANS CYCLES         | FRANIGA                     | FANDAL            |
| BELUNA              | ELOT                 | JAPANET              | DALLAS COMBOYS              | MACROSOFT STORE   |
| MEMORY EXPRESS      | BIG W                | ANUTORE              | MACROSOFT STORE             | EBUY              |
| MYSTER AUTO         | CONFY                | DOLLAR SHAVE CLUB    | TEKUSA                      | THE HOME DEPOT    |
| THE WAREHOUSE       | WEBKE                | FALABELLA.COM        | AMOTO                       | NOVELKEYS         |
| CAMPING WORLD       | DRABAND              | STODUIT              | ANCIENT-ORIGINS             | FANCY BERRIE      |
| PIER 1 IMPORTS      | APTEKA MEISSA        | NITX STORE           | PARTS GEEK                  | STORBUS           |
| URALDI              | MAGASEEK             | SMAPISH              | CLUCKS                      | HASHAGTRADE       |
| MEIN SCHÖNER GARTEN | DIEH MAY XANH        | KASTA                | BLUCKO                      | HSE               |
| RENDEZ-VOUS         | JENSUNISA            | JACK'S SMALL ENGINES | CAROUSELL                   | LEDWATCH SHOP     |
| ENDEI               | LIVING SPACES        | REPAIR CLINIC        | LE MALL                     |                   |
| MREXCEL             | VSEMYEN              | COW                  | WEBTEMPLATES                |                   |
| ROGUE               | PPTSHOP              | BOXUS                | ID                          |                   |
| ONLINEHUB           | ECOFINDER            | EBUYER.COM           | ONJUY                       |                   |
| MACUPATE            | SANTERIKKA ONLINE    | APPLIANCESDIRECT     | SULPAC                      |                   |
| ARSENAL FC          | 1800 FLOWERS         | PETS AT HOME         | DKC                         |                   |
| LATV                | PMB ROW              | VAKABOO              | LUCKY VITAMIN               |                   |
| COOP (NO)           | ALLO                 | IN ANY ROOM          | ONE DAY ONLY                |                   |
| HOBBYCRAFT          | AUD                  | DK.COM               | TEHOMANIA                   |                   |
| PLUS                | BLUE NILE            | KITAMURA             | BHINNEKA                    |                   |
| MSC                 | CHEAPER THAN DIRT    | VIAGGO               | GOOP                        |                   |
| W CONCEPT           | HONTO                | JIM BULLION          | OFFICEMATE                  |                   |

|                      |                             |                   |
|----------------------|-----------------------------|-------------------|
| ELIM SHOP            | DOLLAR GENERAL              | MADERAMADERA      |
| VIPSHOP (VIP.COM)    | DECIFFE                     | CATCH             |
| GLOBAL INDUSTRIAL    | PEER                        | TECHNO DOM        |
| WELL CA              | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| BIG BASKET           | REVIVER SOFT                | THE GOOD GUYS     |
| INCE HESAP           | DANGANG                     | ANDI              |
| BUDS                 | GLOBAL SOURCES              | ELDO              |
| PINPROCK             | GENERAL ELECTRIC COMPANY    | TATA CLIQ         |
| PHONE                | DR MAX                      | T-SUN             |
| PCSTORE              | CLASSIC FIREARMS            | SHOP              |
| OFFICEWORKS          | NOEL LEEMING                | DARIKADE          |
| MERRELL              | PONTO                       | STEPHANS          |
| AND TOWLS            | AND TOWLS                   | FC MATTES         |
| VICTORIAN PLUMBING   | HANSEM                      | TAK SHOP          |
| MATRESS FIRM         | ANY SHOP                    | REINTEGRALAGERINN |
| DIHOLIC              | BIG BANG                    | KULIMALL          |
| FOXTROT              | ESTANTE VIRTUAL             | MEGADAD IT        |
| MIGHTY APE           | SURMARINO                   | TOLUUSTINN        |
| NET OFF              | GRIN                        | KASH KZ           |
| ET MALL              | SHOPTIME                    | LENSKART          |
| ROTITA               | NEW AUCTION                 | SNAPDEAL          |
| MEKUR                | FIRST CRY                   | CITY CENTER       |
| KONGEZ               | SOUISOFT                    | BD SHOP           |
| MUSCUM'S FRIEND      | JAPANESE FUTSAL ASSOCIATION | OFERTA SMPLE      |
| MYER                 | KOGANI.COM                  | AKESIDEAL         |
| RUNNING WAREHOUSE    | WALL                        | LIBUY             |
| DICKENSNOCHI         | PC FACTORY                  | DESERT CART       |
| QUILL                | FOTOSOLAD                   | YASHIRY           |
| GO OUTDOORS          | KONGKA                      | FANDAL            |
| HERO FORGE           | FRANIGA                     | MACROSOFT STORE   |
| DALLAS COMBOYS       | MACROSOFT STORE             | EBUY              |
| EVANS CYCLES         | JAPANET                     | THE HOME DEPOT    |
| ELOT                 | TEKUSA                      | NOVELKEYS         |
| ANUTORE              | AMOTO                       | FANCY BERRIE      |
| DOLLAR SHAVE CLUB    | ANCIENT-ORIGINS             | STORBUS           |
| FALABELLA.COM        | PARTS GEEK                  | HASHAGTRADE       |
| STODUIT              | NITX STORE                  | HSE               |
| NITX STORE           | CLUCKS                      | LEDWATCH SHOP     |
| SMAPISH              | BLUCKO                      |                   |
| KASTA                | CAROUSELL                   |                   |
| JACK'S SMALL ENGINES | LE MALL                     |                   |
| REPAIR CLINIC        | WEBTEMPLATES                |                   |
| COW                  | ID                          |                   |
| BOXUS                | ONJUY                       |                   |
| EBUYER.COM           | SULPAC                      |                   |
| APPLIANCESDIRECT     | DKC                         |                   |
| PETS AT HOME         | LUCKY VITAMIN               |                   |
| VAKABOO              | ONE DAY ONLY                |                   |
| IN ANY ROOM          | TEHOMANIA                   |                   |
| DK.COM               | BHINNEKA                    |                   |
| KITAMURA             | GOOP                        |                   |
| VIAGGO               | OFFICEMATE                  |                   |
| JIM BULLION          |                             |                   |

|                      |                             |                   |
|----------------------|-----------------------------|-------------------|
| ELIM SHOP            | DOLLAR GENERAL              | MADERAMADERA      |
| VIPSHOP (VIP.COM)    | DECIFFE                     | CATCH             |
| GLOBAL INDUSTRIAL    | PEER                        | TECHNO DOM        |
| WELL CA              | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| BIG BASKET           | REVIVER SOFT                | THE GOOD GUYS     |
| INCE HESAP           | DANGANG                     | ANDI              |
| BUDS                 | GLOBAL SOURCES              | ELDO              |
| PINPROCK             | GENERAL ELECTRIC COMPANY    | TATA CLIQ         |
| PHONE                | DR MAX                      | T-SUN             |
| PCSTORE              | CLASSIC FIREARMS            | SHOP              |
| OFFICEWORKS          | NOEL LEEMING                | DARIKADE          |
| MERRELL              | PONTO                       | STEPHANS          |
| AND TOWLS            | AND TOWLS                   | FC MATTES         |
| VICTORIAN PLUMBING   | HANSEM                      | TAK SHOP          |
| MATRESS FIRM         | ANY SHOP                    | REINTEGRALAGERINN |
| DIHOLIC              | BIG BANG                    | KULIMALL          |
| FOXTROT              | ESTANTE VIRTUAL             | MEGADAD IT        |
| MIGHTY APE           | SURMARINO                   | TOLUUSTINN        |
| NET OFF              | GRIN                        | KASH KZ           |
| ET MALL              | SHOPTIME                    | LENSKART          |
| ROTITA               | NEW AUCTION                 | SNAPDEAL          |
| MEKUR                | FIRST CRY                   | CITY CENTER       |
| KONGEZ               | SOUISOFT                    | BD SHOP           |
| MUSCUM'S FRIEND      | JAPANESE FUTSAL ASSOCIATION | OFERTA SMPLE      |
| MYER                 | KOGANI.COM                  | AKESIDEAL         |
| RUNNING WAREHOUSE    | WALL                        | LIBUY             |
| DICKENSNOCHI         | PC FACTORY                  | DESERT CART       |
| QUILL                | FOTOSOLAD                   | YASHIRY           |
| GO OUTDOORS          | KONGKA                      | FANDAL            |
| HERO FORGE           | FRANIGA                     | MACROSOFT STORE   |
| DALLAS COMBOYS       | MACROSOFT STORE             | EBUY              |
| EVANS CYCLES         | JAPANET                     | THE HOME DEPOT    |
| ELOT                 | TEKUSA                      | NOVELKEYS         |
| ANUTORE              | AMOTO                       | FANCY BERRIE      |
| DOLLAR SHAVE CLUB    | ANCIENT-ORIGINS             | STORBUS           |
| FALABELLA.COM        | PARTS GEEK                  | HASHAGTRADE       |
| STODUIT              | NITX STORE                  | HSE               |
| NITX STORE           | CLUCKS                      | LEDWATCH SHOP     |
| SMAPISH              | BLUCKO                      |                   |
| KASTA                | CAROUSELL                   |                   |
| JACK'S SMALL ENGINES | LE MALL                     |                   |
| REPAIR CLINIC        | WEBTEMPLATES                |                   |
| COW                  | ID                          |                   |
| BOXUS                | ONJUY                       |                   |
| EBUYER.COM           | SULPAC                      |                   |
| APPLIANCESDIRECT     | DKC                         |                   |
| PETS AT HOME         | LUCKY VITAMIN               |                   |
| VAKABOO              | ONE DAY ONLY                |                   |
| IN ANY ROOM          | TEHOMANIA                   |                   |
| DK.COM               | BHINNEKA                    |                   |
| KITAMURA             | GOOP                        |                   |
| VIAGGO               | OFFICEMATE                  |                   |
| JIM BULLION          |                             |                   |

|                      |                             |                   |
|----------------------|-----------------------------|-------------------|
| ELIM SHOP            | DOLLAR GENERAL              | MADERAMADERA      |
| VIPSHOP (VIP.COM)    | DECIFFE                     | CATCH             |
| GLOBAL INDUSTRIAL    | PEER                        | TECHNO DOM        |
| WELL CA              | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| BIG BASKET           | REVIVER SOFT                | THE GOOD GUYS     |
| INCE HESAP           | DANGANG                     | ANDI              |
| BUDS                 | GLOBAL SOURCES              | ELDO              |
| PINPROCK             | GENERAL ELECTRIC COMPANY    | TATA CLIQ         |
| PHONE                | DR MAX                      | T-SUN             |
| PCSTORE              | CLASSIC FIREARMS            | SHOP              |
| OFFICEWORKS          | NOEL LEEMING                | DARIKADE          |
| MERRELL              | PONTO                       | STEPHANS          |
| AND TOWLS            | AND TOWLS                   | FC MATTES         |
| VICTORIAN PLUMBING   | HANSEM                      | TAK SHOP          |
| MATRESS FIRM         | ANY SHOP                    | REINTEGRALAGERINN |
| DIHOLIC              | BIG BANG                    | KULIMALL          |
| FOXTROT              | ESTANTE VIRTUAL             | MEGADAD IT        |
| MIGHTY APE           | SURMARINO                   | TOLUUSTINN        |
| NET OFF              | GRIN                        | KASH KZ           |
| ET MALL              | SHOPTIME                    | LENSKART          |
| ROTITA               | NEW AUCTION                 | SNAPDEAL          |
| MEKUR                | FIRST CRY                   | CITY CENTER       |
| KONGEZ               | SOUISOFT                    | BD SHOP           |
| MUSCUM'S FRIEND      | JAPANESE FUTSAL ASSOCIATION | OFERTA SMPLE      |
| MYER                 | KOGANI.COM                  | AKESIDEAL         |
| RUNNING WAREHOUSE    | WALL                        | LIBUY             |
| DICKENSNOCHI         | PC FACTORY                  | DESERT CART       |
| QUILL                | FOTOSOLAD                   | YASHIRY           |
| GO OUTDOORS          | KONGKA                      | FANDAL            |
| HERO FORGE           | FRANIGA                     | MACROSOFT STORE   |
| DALLAS COMBOYS       | MACROSOFT STORE             | EBUY              |
| EVANS CYCLES         | JAPANET                     | THE HOME DEPOT    |
| ELOT                 | TEKUSA                      | NOVELKEYS         |
| ANUTORE              | AMOTO                       | FANCY BERRIE      |
| DOLLAR SHAVE CLUB    | ANCIENT-ORIGINS             | STORBUS           |
| FALABELLA.COM        | PARTS GEEK                  | HASHAGTRADE       |
| STODUIT              | NITX STORE                  | HSE               |
| NITX STORE           | CLUCKS                      | LEDWATCH SHOP     |
| SMAPISH              | BLUCKO                      |                   |
| KASTA                | CAROUSELL                   |                   |
| JACK'S SMALL ENGINES | LE MALL                     |                   |
| REPAIR CLINIC        | WEBTEMPLATES                |                   |
| COW                  | ID                          |                   |
| BOXUS                | ONJUY                       |                   |
| EBUYER.COM           | SULPAC                      |                   |
| APPLIANCESDIRECT     | DKC                         |                   |
| PETS AT HOME         | LUCKY VITAMIN               |                   |
| VAKABOO              | ONE DAY ONLY                |                   |
| IN ANY ROOM          | TEHOMANIA                   |                   |
| DK.COM               | BHINNEKA                    |                   |
| KITAMURA             | GOOP                        |                   |
| VIAGGO               | OFFICEMATE                  |                   |
| JIM BULLION          |                             |                   |

|                      |                             |                   |
|----------------------|-----------------------------|-------------------|
| ELIM SHOP            | DOLLAR GENERAL              | MADERAMADERA      |
| VIPSHOP (VIP.COM)    | DECIFFE                     | CATCH             |
| GLOBAL INDUSTRIAL    | PEER                        | TECHNO DOM        |
| WELL CA              | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| BIG BASKET           | REVIVER SOFT                | THE GOOD GUYS     |
| INCE HESAP           | DANGANG                     | ANDI              |
| BUDS                 | GLOBAL SOURCES              | ELDO              |
| PINPROCK             | GENERAL ELECTRIC COMPANY    | TATA CLIQ         |
| PHONE                | DR MAX                      | T-SUN             |
| PCSTORE              | CLASSIC FIREARMS            | SHOP              |
| OFFICEWORKS          | NOEL LEEMING                | DARIKADE          |
| MERRELL              | PONTO                       | STEPHANS          |
| AND TOWLS            | AND TOWLS                   | FC MATTES         |
| VICTORIAN PLUMBING   | HANSEM                      | TAK SHOP          |
| MATRESS FIRM         | ANY SHOP                    | REINTEGRALAGERINN |
| DIHOLIC              | BIG BANG                    | KULIMALL          |
| FOXTROT              | ESTANTE VIRTUAL             | MEGADAD IT        |
| MIGHTY APE           | SURMARINO                   | TOLUUSTINN        |
| NET OFF              | GRIN                        | KASH KZ           |
| ET MALL              | SHOPTIME                    | LENSKART          |
| ROTITA               | NEW AUCTION                 | SNAPDEAL          |
| MEKUR                | FIRST CRY                   | CITY CENTER       |
| KONGEZ               | SOUISOFT                    | BD SHOP           |
| MUSCUM'S FRIEND      | JAPANESE FUTSAL ASSOCIATION | OFERTA SMPLE      |
| MYER                 | KOGANI.COM                  | AKESIDEAL         |
| RUNNING WAREHOUSE    | WALL                        | LIBUY             |
| DICKENSNOCHI         | PC FACTORY                  | DESERT CART       |
| QUILL                | FOTOSOLAD                   | YASHIRY           |
| GO OUTDOORS          | KONGKA                      | FANDAL            |
| HERO FORGE           | FRANIGA                     | MACROSOFT STORE   |
| DALLAS COMBOYS       | MACROSOFT STORE             | EBUY              |
| EVANS CYCLES         | JAPANET                     | THE HOME DEPOT    |
| ELOT                 | TEKUSA                      | NOVELKEYS         |
| ANUTORE              | AMOTO                       | FANCY BERRIE      |
| DOLLAR SHAVE CLUB    | ANCIENT-ORIGINS             | STORBUS           |
| FALABELLA.COM        | PARTS GEEK                  | HASHAGTRADE       |
| STODUIT              | NITX STORE                  | HSE               |
| NITX STORE           | CLUCKS                      | LEDWATCH SHOP     |
| SMAPISH              | BLUCKO                      |                   |
| KASTA                | CAROUSELL                   |                   |
| JACK'S SMALL ENGINES | LE MALL                     |                   |
| REPAIR CLINIC        | WEBTEMPLATES                |                   |
| COW                  | ID                          |                   |
| BOXUS                | ONJUY                       |                   |
| EBUYER.COM           | SULPAC                      |                   |
| APPLIANCESDIRECT     | DKC                         |                   |
| PETS AT HOME         | LUCKY VITAMIN               |                   |
| VAKABOO              | ONE DAY ONLY                |                   |
| IN ANY ROOM          | TEHOMANIA                   |                   |
| DK.COM               | BHINNEKA                    |                   |
| KITAMURA             | GOOP                        |                   |
| VIAGGO               | OFFICEMATE                  |                   |
| JIM BULLION          |                             |                   |

|                      |                             |                   |
|----------------------|-----------------------------|-------------------|
| ELIM SHOP            | DOLLAR GENERAL              | MADERAMADERA      |
| VIPSHOP (VIP.COM)    | DECIFFE                     | CATCH             |
| GLOBAL INDUSTRIAL    | PEER                        | TECHNO DOM        |
| WELL CA              | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| BIG BASKET           | REVIVER SOFT                | THE GOOD GUYS     |
| INCE HESAP           | DANGANG                     | ANDI              |
| BUDS                 | GLOBAL SOURCES              | ELDO              |
| PINPROCK             | GENERAL ELECTRIC COMPANY    | TATA CLIQ         |
| PHONE                | DR MAX                      | T-SUN             |
| PCSTORE              | CLASSIC FIREARMS            | SHOP              |
| OFFICEWORKS          | NOEL LEEMING                | DARIKADE          |
| MERRELL              | PONTO                       | STEPHANS          |
| AND TOWLS            | AND TOWLS                   | FC MATTES         |
| VICTORIAN PLUMBING   | HANSEM                      | TAK SHOP          |
| MATRESS FIRM         | ANY SHOP                    | REINTEGRALAGERINN |
| DIHOLIC              | BIG BANG                    | KULIMALL          |
| FOXTROT              | ESTANTE VIRTUAL             | MEGADAD IT        |
| MIGHTY APE           | SURMARINO                   | TOLUUSTINN        |
| NET OFF              | GRIN                        | KASH KZ           |
| ET MALL              | SHOPTIME                    | LENSKART          |
| ROTITA               | NEW AUCTION                 | SNAPDEAL          |
| MEKUR                | FIRST CRY                   | CITY CENTER       |
| KONGEZ               | SOUISOFT                    | BD SHOP           |
| MUSCUM'S FRIEND      | JAPANESE FUTSAL ASSOCIATION | OFERTA SMPLE      |
| MYER                 | KOGANI.COM                  | AKESIDEAL         |
| RUNNING WAREHOUSE    | WALL                        | LIBUY             |
| DICKENSNOCHI         | PC FACTORY                  | DESERT CART       |
| QUILL                | FOTOSOLAD                   | YASHIRY           |
| GO OUTDOORS          | KONGKA                      | FANDAL            |
| HERO FORGE           | FRANIGA                     | MACROSOFT STORE   |
| DALLAS COMBOYS       | MACROSOFT STORE             | EBUY              |
| EVANS CYCLES         | JAPANET                     | THE HOME DEPOT    |
| ELOT                 | TEKUSA                      | NOVELKEYS         |
| ANUTORE              | AMOTO                       | FANCY BERRIE      |
| DOLLAR SHAVE CLUB    | ANCIENT-ORIGINS             | STORBUS           |
| FALABELLA.COM        | PARTS GEEK                  | HASHAGTRADE       |
| STODUIT              | NITX STORE                  | HSE               |
| NITX STORE           | CLUCKS                      | LEDWATCH SHOP     |
| SMAPISH              | BLUCKO                      |                   |
| KASTA                | CAROUSELL                   |                   |
| JACK'S SMALL ENGINES | LE MALL                     |                   |
| REPAIR CLINIC        | WEBTEMPLATES                |                   |
| COW                  | ID                          |                   |
| BOXUS                | ONJUY                       |                   |
| EBUYER.COM           | SULPAC                      |                   |
| APPLIANCESDIRECT     | DKC                         |                   |
| PETS AT HOME         | LUCKY VITAMIN               |                   |
| VAKABOO              | ONE DAY ONLY                |                   |
| IN ANY ROOM          | TEHOMANIA                   |                   |
| DK.COM               | BHINNEKA                    |                   |
| KITAMURA             | GOOP                        |                   |
| VIAGGO               | OFFICEMATE                  |                   |
| JIM BULLION          |                             |                   |

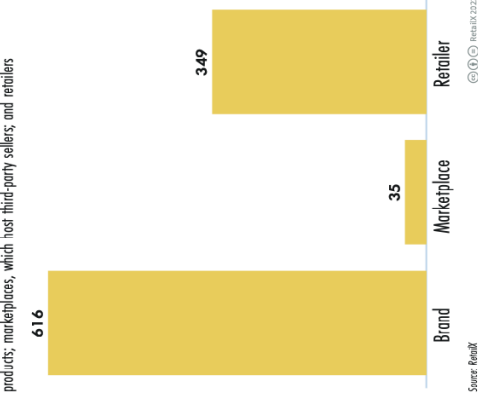
|                      |                             |                   |
|----------------------|-----------------------------|-------------------|
| ELIM SHOP            | DOLLAR GENERAL              | MADERAMADERA      |
| VIPSHOP (VIP.COM)    | DECIFFE                     | CATCH             |
| GLOBAL INDUSTRIAL    | PEER                        | TECHNO DOM        |
| WELL CA              | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| BIG BASKET           | REVIVER SOFT                | THE GOOD GUYS     |
| INCE HESAP           | DANGANG                     | ANDI              |
| BUDS                 | GLOBAL SOURCES              | ELDO              |
| PINPROCK             | GENERAL ELECTRIC COMPANY    | TATA CLIQ         |
| PHONE                | DR MAX                      | T-SUN             |
| PCSTORE              | CLASSIC FIREARMS            | SHOP              |
| OFFICEWORKS          | NOEL LEEMING                | DARIKADE          |
| MERRELL              | PONTO                       | STEPHANS          |
| AND TOWLS            | AND TOWLS                   | FC MATTES         |
| VICTORIAN PLUMBING   | HANSEM                      | TAK SHOP          |
| MATRESS FIRM         | ANY SHOP                    | REINTEGRALAGERINN |
| DIHOLIC              | BIG BANG                    | KULIMALL          |
| FOXTROT              | ESTANTE VIRTUAL             | MEGADAD IT        |
| MIGHTY APE           | SURMARINO                   | TOLUUSTINN        |
| NET OFF              | GRIN                        | KASH KZ           |
| ET MALL              | SHOPTIME                    | LENSKART          |
| ROTITA               | NEW AUCTION                 | SNAPDEAL          |
| MEKUR                | FIRST CRY                   | CITY CENTER       |
| KONGEZ               | SOUISOFT                    | BD SHOP           |
| MUSCUM'S FRIEND      | JAPANESE FUTSAL ASSOCIATION | OFERTA SMPLE      |
| MYER                 | KOGANI.COM                  | AKESIDEAL         |
| RUNNING WAREHOUSE    | WALL                        | LIBUY             |
| DICKENSNOCHI         | PC FACTORY                  | DESERT CART       |
| QUILL                | FOTOSOLAD                   | YASHIRY           |
| GO OUTDOORS          | KONGKA                      | FANDAL            |
| HERO FORGE           | FRANIGA                     | MACROSOFT STORE   |
| DALLAS COMBOYS       | MACROSOFT STORE             | EBUY              |
| EVANS CYCLES         | JAPANET                     | THE HOME DEPOT    |
| ELOT                 | TEKUSA                      | NOVELKEYS         |
| ANUTORE              | AMOTO                       | FANCY BERRIE      |
| DOLLAR SHAVE CLUB    | ANCIENT-ORIGINS             | STORBUS           |
| FALABELLA.COM        | PARTS GEEK                  | HASHAGTRADE       |
| STODUIT              | NITX STORE                  | HSE               |
| NITX STORE           | CLUCKS                      | LEDWATCH SHOP     |
| SMAPISH              | BLUCKO                      |                   |
| KASTA                | CAROUSELL                   |                   |
| JACK'S SMALL ENGINES | LE MALL                     |                   |
| REPAIR CLINIC        | WEBTEMPLATES                |                   |
| COW                  | ID                          |                   |
| BOXUS                | ONJUY                       |                   |
| EBUYER.COM           | SULPAC                      |                   |
| APPLIANCESDIRECT     | DKC                         |                   |
| PETS AT HOME         | LUCKY VITAMIN               |                   |
| VAKABOO              | ONE DAY ONLY                |                   |
| IN ANY ROOM          | TEHOMANIA                   |                   |
| DK.COM               | BHINNEKA                    |                   |
| KITAMURA             | GOOP                        |                   |
| VIAGGO               | OFFICEMATE                  |                   |
| JIM BULLION          |                             |                   |

|                    |                             |                   |
|--------------------|-----------------------------|-------------------|
| ELIM SHOP          | DOLLAR GENERAL              | MADERAMADERA      |
| VIPSHOP (VIP.COM)  | DECIFFE                     | CATCH             |
| GLOBAL INDUSTRIAL  | PEER                        | TECHNO DOM        |
| WELL CA            | NOTIONHERIGHSTREET          | APTEKA OT SKLAJA  |
| BIG BASKET         | REVIVER SOFT                | THE GOOD GUYS     |
| INCE HESAP         | DANGANG                     | ANDI              |
| BUDS               | GLOBAL SOURCES              | ELDO              |
| PINPROCK           | GENERAL ELECTRIC COMPANY    | TATA CLIQ         |
| PHONE              | DR MAX                      | T-SUN             |
| PCSTORE            | CLASSIC FIREARMS            | SHOP              |
| OFFICEWORKS        | NOEL LEEMING                | DARIKADE          |
| MERRELL            | PONTO                       | STEPHANS          |
| AND TOWLS          | AND TOWLS                   | FC MATTES         |
| VICTORIAN PLUMBING | HANSEM                      | TAK SHOP          |
| MATRESS FIRM       | ANY SHOP                    | REINTEGRALAGERINN |
| DIHOLIC            | BIG BANG                    | KULIMALL          |
| FOXTROT            | ESTANTE VIRTUAL             | MEGADAD IT        |
| MIGHTY APE         | SURMARINO                   | TOLUUSTINN        |
| NET OFF            | GRIN                        | KASH KZ           |
| ET MALL            | SHOPTIME                    | LENSKART          |
| ROTITA             | NEW AUCTION                 | SNAPDEAL          |
| MEKUR              | FIRST CRY                   | CITY CENTER       |
| KONGEZ             | SOUISOFT                    | BD SHOP           |
| MUSCUM'S FRIEND    | JAPANESE FUTSAL ASSOCIATION | OFERTA SMPLE      |
| MYER               | KOGANI.COM                  | AKESIDEAL         |
| RUNNING WAREHOUSE  | WALL                        | LIBUY             |
| DICKENSNOCHI       | PC FACTORY                  | DESERT CART       |
| QUILL              | FOTOSOLAD                   | YASHIRY           |
| GO OUTDOORS        | KONGKA                      | FANDAL            |
| HERO FORGE         | FRANIGA                     | MACROSOFT STORE   |
| DALLAS COMBOYS     | MACROSOFT STORE             | EBUY              |
| EVANS CYCLES       | JAPANET                     | THE HOME DEPOT    |
| ELOT               | TEKUSA                      | NOVELKEYS         |
| ANUTORE            | AMOTO                       | FANCY BERRIE      |
| DOLLAR SHAVE CLUB  |                             |                   |

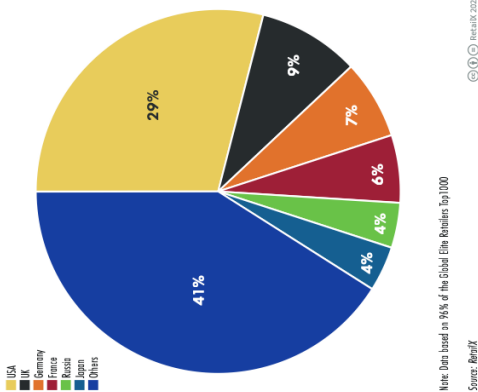
# THE RETAILX GLOBAL ELITE

## Business types of the Global Elite 1000

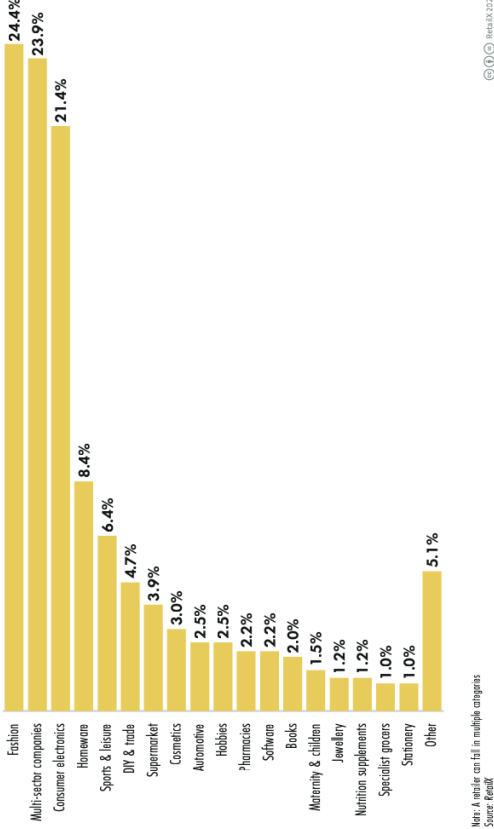
The number of top1000 retailers that are brands, which mostly sell own-label products; marketplaces, which host third-party sellers; and retailers



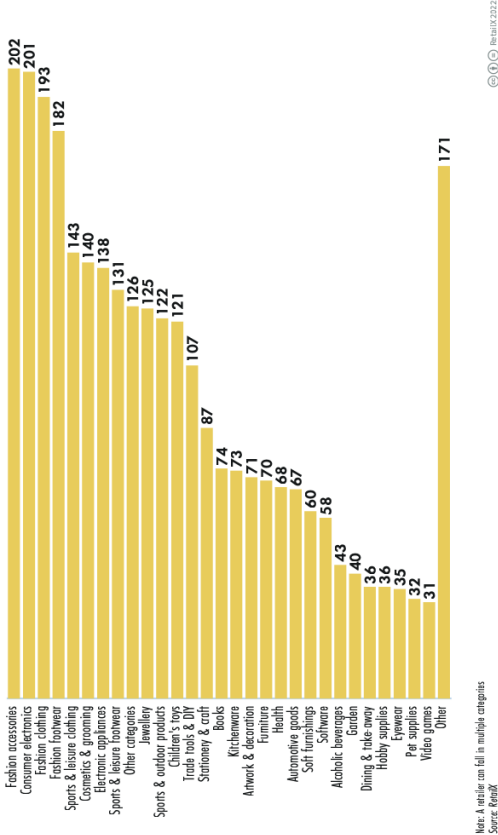
## Countries where the Global Elite 1000 are based



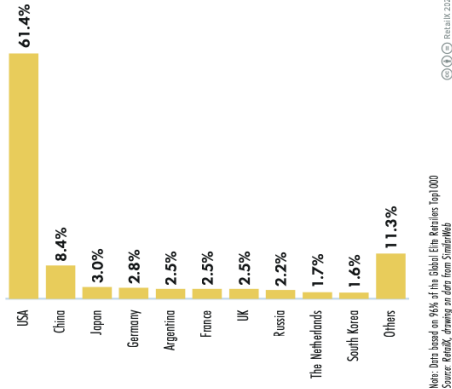
## Share of companies in the Top500, by sector



## Number of companies in the Top500, by product category sold

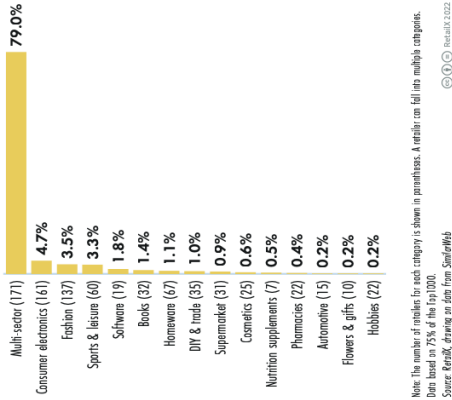


## Worldwide web traffic to the Global Elite 1000, by country of retailer headquarters



## Web traffic, by sector

The percentage of web visits to the Global Elite 1000 from worldwide consumers, by sector



## PARTNER PERSPECTIVE

As the pace of change across the retail industry continues to accelerate, Rebecca Bemhena, VP of Content for Shoptalk Europe, explains why it's never been more important to come together to learn, network, collaborate and evolve.



After 2+ years of focusing on technology deployments necessary to keep the business running, the retail industry is entering an exciting new phase of innovation – one where retailers and brands can once again shift their thinking from being reactive to proactive.

Shoptalk Europe brings together 3,000+ of the industry's decision-makers to connect and learn about the latest retail technologies and business models, to help them thrive in retail's digital future.

Our industry-leading agenda features 200+ inspiring speakers who are at the forefront of retail's digital transformation. They'll discuss the full sweep of industry innovation, from emerging opportunities like NFTs and the metaverse, to the widespread adoption of solutions like artificial intelligence and robotics.

Attendees will hear from senior leaders at established players including Ocado Group, whose CEO will share his vision for the future of automated grocery fulfilment; Carrefour, whose Executive Director E-Commerce of Data and Digital Transformation will discuss their approach to the metaverse (including why they purchased a plot of land in The Sandbox); and Sephora, whose President of Europe and Middle East will share how the leader in personalisation continues to evolve its ultra-high touchpoint customer experiences by deploying technologies like artificial intelligence and augmented reality.

They'll also hear from the next wave of industry disruptors, including the Co-Founder & CEO of Back Market – a startup valued at \$5.7 billion that's utilising technology to enable people to buy refurbished technology products.

Equally as important, our 3,000+ global attendees – who represent 1400+ companies and 69 countries – will have the opportunity to network and learn from each other across a range of on-site programmes. Our Hosted Retailers & Brands

Programme matches retailers and brands with solution providers for high-impact 1:1 meetings. Our Table Talks peer discussion groups allow brands and retailers to discuss the biggest challenges and opportunities facing the industry today in an open and welcoming setting.

Innovation never slows down, and those businesses who fail to embrace new technologies and business models risk becoming obsolete.

This is why Shoptalk Europe exists: to build a new community that brings together the entire European retail ecosystem, including large retailers and brands, VC-backed startups, technology companies, investors, media and analysts, to learn, network, collaborate and evolve.

It's also why we are beyond excited to be partnering with Internet Retailing on their Global Elite 1000 report, which shines a spotlight on the top 1,000 Retailers and Brands across Europe. Many of these companies will be speaking at and attending Shoptalk Europe.

We would like to wish a hearty congratulations to those that made it onto this important list, and look forward to continuing the conversation at Shoptalk Europe 6-8 June 2022 at ExCeL London. ■

### SHOPTALK EUROPE

**Rebecca Bemhena**  
VP Content, Shoptalk Europe

Shoptalk is the world's largest community of retail changemakers. Founded in 2016, it is widely accepted as the global home for retail innovators. Shoptalk Europe is coming to London on 6-8 June to be the new home for Europe's retail boldest and bravest trailblazers to reimagine the future. [shoptalkeurope.com](https://shoptalkeurope.com)



# NORTH AMERICA

323 of the Global Elite 1000 retailers are headquartered in North America, with the majority based in the US, highlighting the massive influence the country has on global retailing. As to be expected, names such as Apple, Amazon, Microsoft and eBay feature in the list of those receiving the most web traffic from North American shoppers and, indeed, also from consumers around the world.

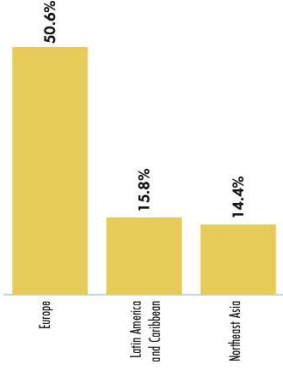
North American consumers are more likely to shop online than a retailer headquartered in the US. Indeed, 98.6% of North American consumer web traffic to the Largest 15 retailers by web traffic is directed at US-headquartered retailers. However, these shoppers account for less than half of the overall web traffic received by North America-based members of the Largest 15 group. Such is the overseas presence and market share that US retailers hold outside of their domestic market.

Only 24 retailers headquartered in the region, but not based in the US, make it onto the Global ranking. These non-US based retailers include Canadian designer fashion retailer, Sense and Mexican department store chain, Liverpool.

So how have these US retailers managed to build such large markets for themselves both in their own region and internationally? Interestingly, just one company from this group – Apple – ranks as Elite in the Global ranking, meaning that its business runs deeper than a large web presence. Turnover, both online and off, store estate and other metrics are weighted alongside web traffic showing the sustainability of the business on the global playing field.

Apple combines category-killing products with high margins and beautiful design, many of which were ahead of their time. It has also built an ecosystem of hardware, software and content into which consumers become immersed. Everything has a premium feel, from the personal service in its bricks-and-mortar stores through to the prestige product packaging. Apple has been masterful in building an aura of luxury and consumer desire, retaining customer loyalty in the process.

## Non-domestic web traffic to North America-based retailers



Note: Regions outside North America generating the most web traffic for the Leading 15 retailers headquartered in North America.  
Source: RetailX, drawing on data from StatistaWeb

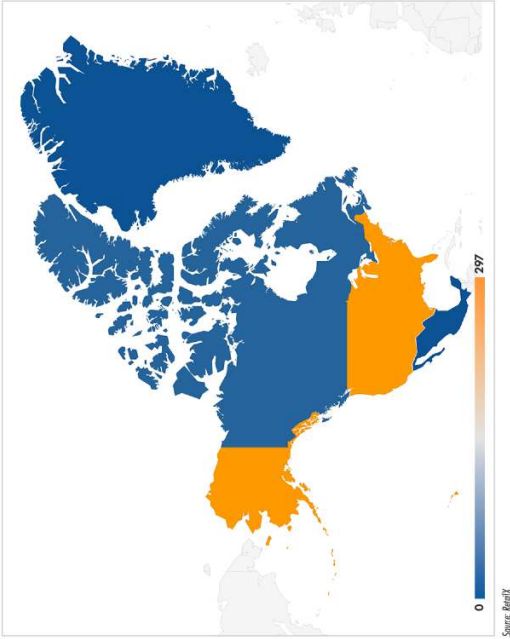
© 2022 RetailX, drawing on data from StatistaWeb

## The Largest 15 retailers, by North American traffic

| RETAILER       | HQ REGION      |
|----------------|----------------|
| ALDEXPRESS     | NORTHEAST ASIA |
| AMAZON         | NORTH AMERICA  |
| APPLE          | NORTH AMERICA  |
| BEST BUY       | NORTH AMERICA  |
| COSTCO         | NORTH AMERICA  |
| EBAY           | NORTH AMERICA  |
| ETSY           | NORTH AMERICA  |
| FANCY BERRIE   | NORTH AMERICA  |
| GOOGLE PLAY    | NORTH AMERICA  |
| THE HOME DEPOT | NORTH AMERICA  |
| MICROSOFT      | NORTH AMERICA  |
| NOFLKEYS       | NORTH AMERICA  |
| TARGET         | NORTH AMERICA  |
| WALMART        | NORTH AMERICA  |
| WATFAR         | NORTH AMERICA  |

Source: RetailX, drawing on data from StatistaWeb

The number of Global Elite 1000 retailers based in each country

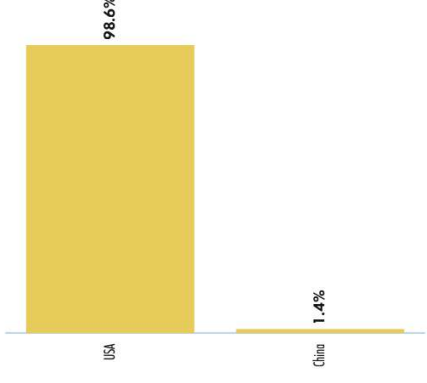


A sample of the 323 North American retailers included in the Global Elite 1000:

|                 |                |
|-----------------|----------------|
| Apple           | ..... Elite    |
| Target          | ..... Leading  |
| Garnini         | ..... Leading  |
| Amazon          | ..... Leading  |
| Nike            | ..... Leading  |
| Microsoft       | ..... Leading  |
| Michael Kors    | ..... Leading  |
| Ace Hardware    | ..... Top_0050 |
| eBay            | ..... Top_0050 |
| Hol Topic       | ..... Top_0050 |
| HP              | ..... Top_0050 |
| Costco          | ..... Top_0050 |
| Google Play     | ..... Top_0050 |
| Under Armour    | ..... Top_0050 |
| Eby             | ..... Top_0050 |
| Steam           | ..... Top_0100 |
| Zendesk         | ..... Top_0100 |
| Sense           | ..... Top_0100 |
| Converse        | ..... Top_0100 |
| Skechers        | ..... Top_0100 |
| New Balance     | ..... Top_0100 |
| Walmart         | ..... Top_0100 |
| B&H Photo Video | ..... Top_0100 |

## Web traffic from consumers in North America to the largest retailers in the region

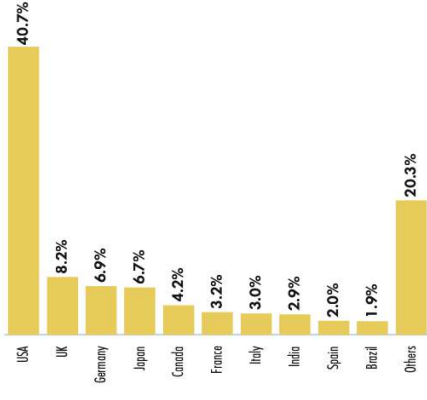
Data is split according to the country where the retailer is headquartered



Note: Retailers in the North America Largest 15 are selected based on North American consumer web traffic. Data based on 97% of the Largest 15.  
Source: RetailX, drawing on data from StatistaWeb

© 2022 RetailX, drawing on data from StatistaWeb

## Countries from which shoppers visit the North America-based Largest 15



Note: There are 12 North America-based retailers among the North America Largest 15. The Largest 15 are selected based on North American consumer web traffic. Data based on 97% of the Largest 15.  
Source: RetailX, drawing on data from StatistaWeb

© 2022 RetailX, drawing on data from StatistaWeb

# LATIN AMERICA AND THE CARIBBEAN

US retailers dominate the web traffic statistics for Latin America and the Caribbean. Amazon, Microsoft, Google, Steam and eBay all appear in the listing of the Largest 15 but they do not dominate the entire market. Brazilian retailers account for a large part, while also attracting customers from other countries in the region. Many retailers from Portugal hint at a level of cross-border trade from expats.

The RetailX Global Elite 1000 ranking includes 26 retailers headquartered in this region. As a group, multi-sector stores and those selling clothing feature heavily. The ecommerce sites are well-merchandised with a good level of product information. They score highly for visual appeal and for complementary product recommendations more likely to be included on sites than those of retailers in other regions.

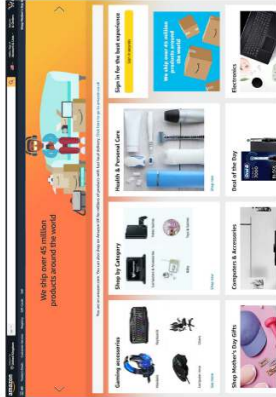
77% of the Global Elite retailers headquartered in Latin America give automatic search recommendations on their mobile sites. This is an area in which retailers have been investing since February 2020, since when there has been a 7% increase in the number of retail sites including autocomplete dropdown.

Leading the region's retailers in the RetailX ranking is marketplace Mercadolibre. Not only is it an ecommerce leader in its home country of Argentina but it also has the highest level of unique visitors and page views in the major countries in which it operates. These include Brazil, Mexico, Colombia, Chile, Venezuela and Peru.

In all, Mercadolibre runs marketplaces in 18 countries and reports that it has more than 139.9m active customers. Its net revenue for its last quarter, to 31 December 2021, reached \$2.1bn – an increase of 73.9% over the same period of 2020. The value of the products by sellers increased as well, 75.5% of which were sold to someone using a mobile phone.

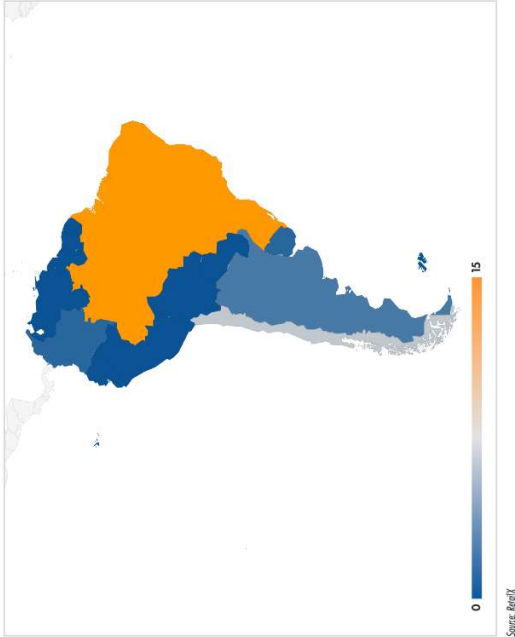
Over half (55%) of orders were delivered either on the day of purchase or the next day, with record average shipping times achieved in Mexico and Chile highlighting developments in these two markets.

Amazon receives the highest level of web traffic from consumers in Latin America, followed by Microsoft and AliExpress



Source: RetailX, drawing on data from Statista

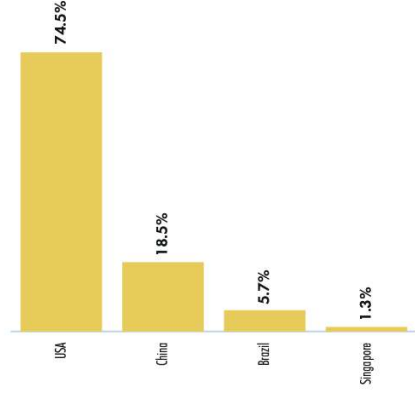
The number of Global Elite 1000 retailers based in each country



Source: RetailX

Web traffic from consumers in Latin America and Caribbean to the largest retailers in the region

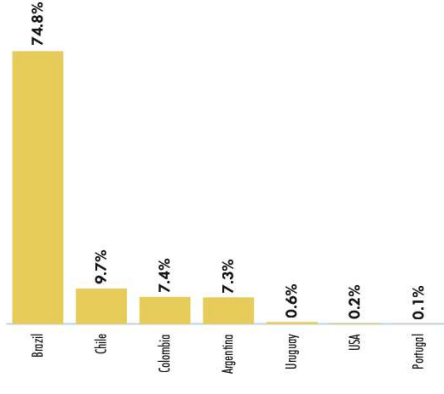
Data is split according to the country where the retailer is headquartered



Note: Retailers in the Latin America and Caribbean Largest 10 are selected based on Latin America and Caribbean consumer web traffic.  
Source: RetailX, drawing on data from Statista

© 2022 retailx.net

Countries from which shoppers visit the Latin America and Caribbean-based Largest 10



Note: There are 3 Latin America and Caribbean-based retailers among the Latin America and Caribbean Largest 10. The Largest 10 are selected based on missing consumer web traffic.  
Source: RetailX, drawing on data from Statista

© 2022 retailx.net

# EUROPE

The majority of retailers and brands in the RetailX Global Elite 1000 ranking are headquartered in Europe. This includes five of the six retailers classified as Elite – Zara, Carrefour, DM, Leroy Merlin and Rewe.

All of the European Elite five are omnichannel retailers that have built up extensive store estates in their domestic markets and overseas as well as being known for their market leading ecommerce sites. For example, French DIY and garden retailer Leroy Merlin has expanded its network of hypermarkets and localised ecommerce sites eastwards across Poland, Romania, Ukraine and Russia, as well as in Brazil and South Africa.

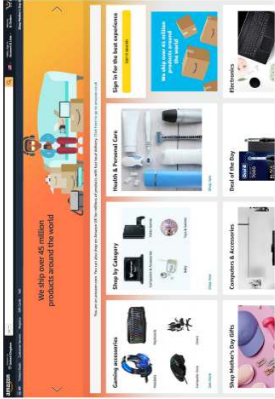
The company prides itself on being a place where everyone can find the products and specialised advice they need, whatever their desires, needs or level of expertise may be. “Staying close to customers is at the core,” of the Elite ranking and resonate with many retailers at the present time.

Localisation comes at a cost, especially where omnichannel is concerned, since retailers have to integrate shopper journeys across multiple touchpoints. Since 2018, French grocer Carrefour has been combining its global store estate of more than 12,000 stores in multiple formats with ecommerce sites localised to each country.

These omnichannel ecosystems offer an experience that’s simple to use for customers and personalised too, integrating stores, online, mobile, localised services, payment offerings and fulfilment methods so that each customer can shop how, when and where they want. The investment has resulted in increased food sales online. An initial 30% growth in ecommerce sales to €1.2bn in 2018 led to 2022’s ambitious target of €5bn. This target has now increased to €10bn by 2026 under a new plan upgrading Carrefour from a self-expressed “traditional retailer with ecommerce capabilities” to a “data-centric, digital first” business.

Many of the 454 retailers from Europe making it into the Global Elite 1000 ranking are already localised customer-centric businesses, hence their growth around the world. Data and AI is what will keep them there.

Amazon receives almost 4x the web traffic from European consumers than any other retailer

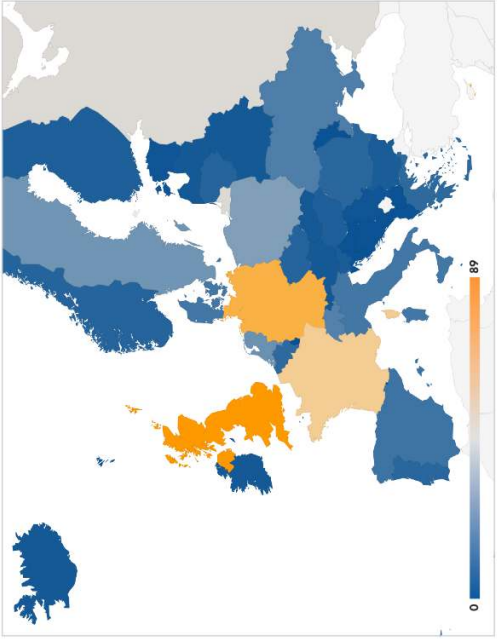


The Largest 15 retailers, by European web traffic

| RETAILER       | HQ REGION      |
|----------------|----------------|
| ALDEXPRESS     | NORTHEAST ASIA |
| AMAZON         | NORTH AMERICA  |
| BIG BANG       | EUROPE         |
| EIKO           | EUROPE         |
| HASHIAGRADE    | EUROPE         |
| HSE            | EUROPE         |
| IDEA           | EUROPE         |
| MERKUR         | EUROPE         |
| MICROSOFT      | NORTH AMERICA  |
| RD ELECTRONICS | EUROPE         |
| RUMALAGERINN   | EUROPE         |
| SCAN           | EUROPE         |
| SKYTECH        | EUROPE         |
| TOLUUSTINN     | EUROPE         |
| YASIRY         | AFRICA         |

Source: RetailX, drawing on data from StatistaWeb

The number of Global Elite 1000 retailers based in each country

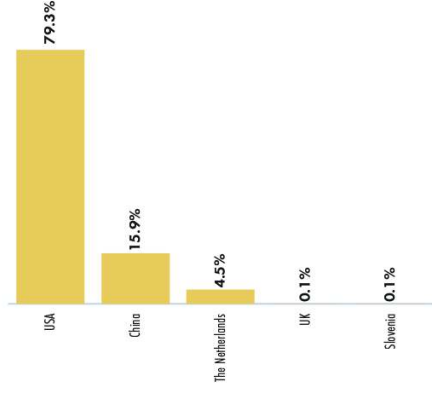


A sample of the 454 European retailers included in the Global Elite 1000

|                  |         |
|------------------|---------|
| Zara             | Elite   |
| Carrefour        | Elite   |
| DM               | Elite   |
| Leroy Merlin     | Elite   |
| Rewe             | Elite   |
| C&A              | Leading |
| Sephora          | Leading |
| Decathlon        | Leading |
| Next             | Leading |
| Gucci            | Leading |
| Mango            | Leading |
| Albert Heijn     | Leading |
| Adidas           | Leading |
| Deichmann        | Leading |
| Friac            | Leading |
| IKEA             | Leading |
| SportsDirect.com | Leading |
| Stradivarius     | Leading |

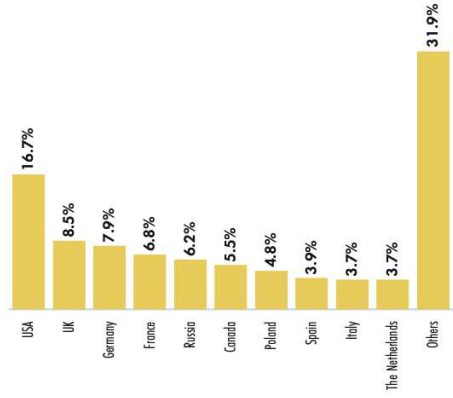
Web traffic from consumers in Europe to the largest retailers in the region

Data is split according to the country where the retailer is headquartered



Note: Retailers in the Europe Target 10 are selected based on European consumer web traffic. Source: RetailX, drawing on data from StatistaWeb

Countries from which shoppers visit the Europe-based Largest 10



Note: There are 7 Europe-based retailers among the Europe Target 10. The Largest 10 are selected based on European consumer web traffic. Source: RetailX, drawing on data from StatistaWeb

# AFRICA

Africa has the youngest population in the world and this fact, along with the growth of smartphone ownership, has led to an online market dominated by mobile commerce. The digital payment options that have evolved alongside mobile commerce have enabled retailers to overcome barriers that could have arisen due to a low uptake of credit cards.

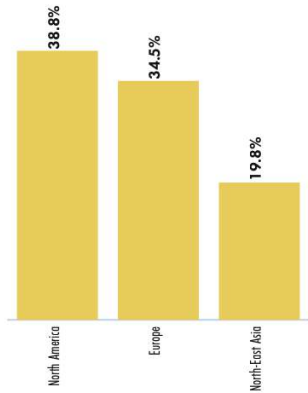
Retailers are also innovative in overcoming other business aspects specific to different countries on the continent. Where a lack of postcodes or informal housing could exclude some from having their online orders delivered, retailers have issued unique passwords to individual customers so that the carrier can confirm delivery has been made to the correct person. Another issue of the large distance from retail warehouse or store to consumers is being addressed by click and collect, while same-day delivery in urban areas is appealing to other shoppers who crave convenience.

“The market potential in South Africa still presents tremendous opportunity,” says Kim Reid, Founder of South African marketplace, Takealot. “While the current pandemic has accelerated consumer adoption of ecommerce by around two to three years, ecommerce still represents less than 3% of total retail in South Africa. This illustrates the scope, opportunity and work that still need to be done.”

Takealot, which ranks in the Top 350 of the RetailX Global Elite listing, sits alongside fashion site Superbalist.com and restaurant food delivery service Mr D Food, as drivers of ecommerce evolution in South Africa under the umbrella of Takealot Group.

While the continent has its unique challenges and opportunities – as do other areas of the world – ecommerce in Africa is maturing along similar lines to other markets. For example, merchandising techniques are on the increase across Africa-based Global Elite retailers, while on-site search relevance across the cohort is among the best in the world. Highlighting the mobile-first nature of digital retailing, African retailers rank highest globally for ease of navigating their mobile sites.

## Non-domestic web traffic to Africa-based retailers



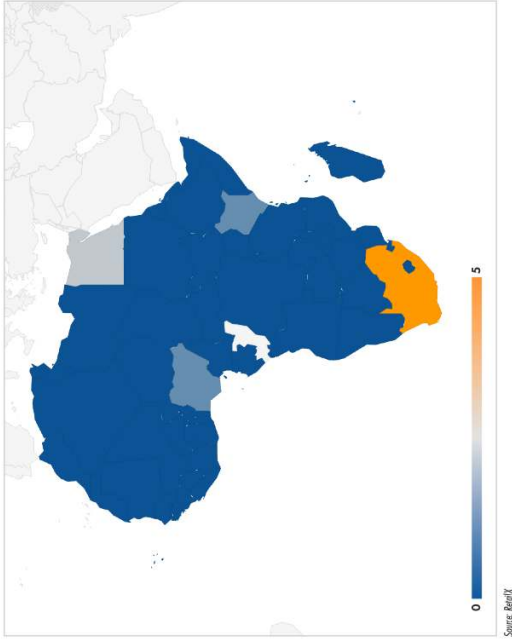
Note: Regions outside Africa generating the most web traffic for the leading 4 retailers headquartered in Africa. Data based on 50% of the largest 15. Source: RetailX, drawing on data from Statista®

## The Largest 15 retailers by African web traffic

| RETAILER       | HQ REGION      |
|----------------|----------------|
| ALEXPRESS      | NORTHEAST ASIA |
| AMAZON         | NORTH AMERICA  |
| GOOGLE PLAY    | NORTH AMERICA  |
| KILIMALL       | AFRICA         |
| KONGA          | AFRICA         |
| MAGAZINE LUIZA | AFRICA         |
| MAKRO          | EUROPE         |
| MERCADOLIBRE   | LATIN AMERICA  |
| MICROSOFT      | NORTH AMERICA  |
| ONE DAY ONLY   | AFRICA         |
| PROM           | EUROPE         |
| RAKUTEN        | NORTHEAST ASIA |
| SUPERBALIST    | AFRICA         |
| TAKEALOT       | AFRICA         |
| TRADERA        | EUROPE         |

Source: RetailX, drawing on data from Statista®

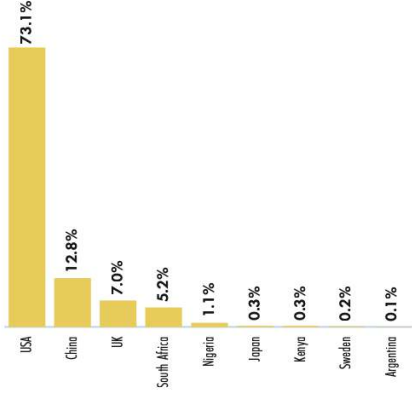
The number of Global Elite 1000 retailers based in each country



- Takealot.....Top\_0350
- Superbalist.....Top\_1000
- Bidibuy.....Top\_1000
- Venus.....Top\_1000
- Konga.....Top\_1000
- Clicks.....Top\_1000
- One Day Only.....Top\_1000
- Kilimall.....Top\_1000
- Yashry.....Top\_1000

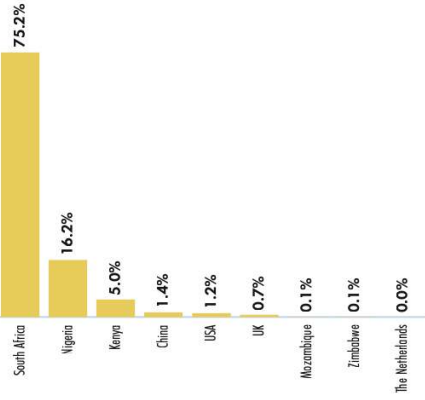
## Web traffic from consumers in Africa to the largest retailers in the region

Data is split according to the country where the retailer is headquartered



Note: Retailers in the Africa largest 15 are selected based on African consumer web traffic. Data based on 50% of the largest 15. Source: RetailX, drawing on data from Statista®

## Countries from which shoppers visit the Africa-based Largest 15



Note: There are four Africa-based retailers among the Africa largest 15. The largest 15 are selected based on African consumer web traffic. Data based on 50% of the largest 15. Source: RetailX, drawing on data from Statista®

# MIDDLE EAST

The Middle East retail sector is still predominantly bricks-and-mortar stores based within shopping malls that offer entertainment and leisure facilities alongside flagship stores.

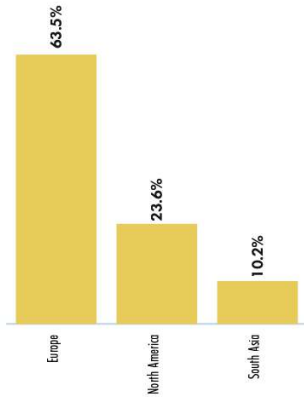
Across the Gulf States, experience is very important to consumers, with the United Arab Emirates being the biggest users of social media in the world. This need for experience is especially true for those with top income tiers. For these customers, individual service is paramount, so retailers are happy to provide it through exclusive shopping floors as well as personal service.

Replicating such high-end service, or turning online shopping into experience-driven occasions, is something that retailers in the region are currently working on. Content, videos and loyalty schemes are all helping to change ecommerce from a transaction-based interaction into an experience-driven one. This is helping to increase conversions online, especially in the beauty category, where online currently makes up just 6% of the total retail market.

As Salem Kaissi, vice president of beauty and cosmetics retailer Faces explains, ecommerce across the Gulf States is not as mature as some areas of the world but things are changing as retailers in the region invest heavily in online and omnichannel. The pandemic saw more consumers shopping online and ecommerce continues to grow fast. Online is predicted to account for 15-20% of business in the next two to three years.

However, such fast growth is putting pressure on delivery services, especially in suburban and remote areas of large countries such as Saudi Arabia. Shoppers who have become used to receiving food deliveries in 90 minutes are expecting everything to be delivered equally quickly, as opposed to the three, four or five day waits of the past. Some of the demand is seasonal due to religious or cultural holidays and events, such as Ramadan, so although carriers have tried to scale quickly, full capacity is not necessarily required all the time. As a result, leading retailers are building their own final-mile solutions to complement the services already available in the market.

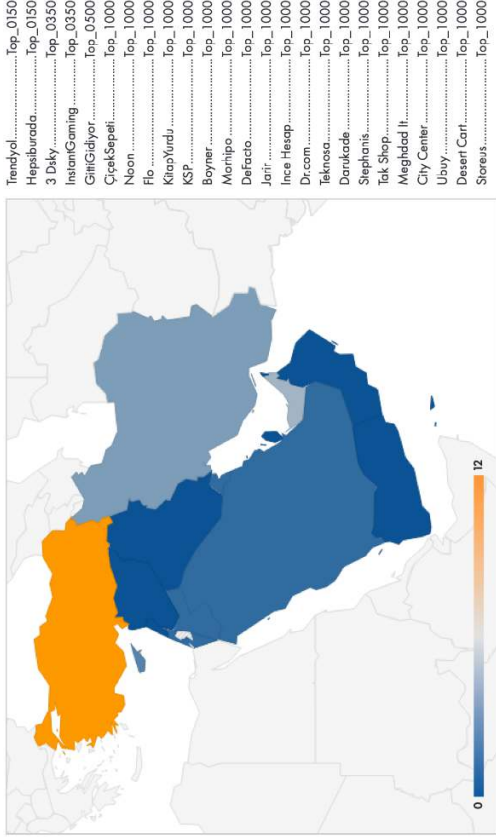
## Non-domestic web traffic to Middle East-based retailers



Regions outside Middle East generating the most web traffic for the leading 7 retailers headquartered in Middle East. Source: RetailX, drawing on data from StatistaWeb

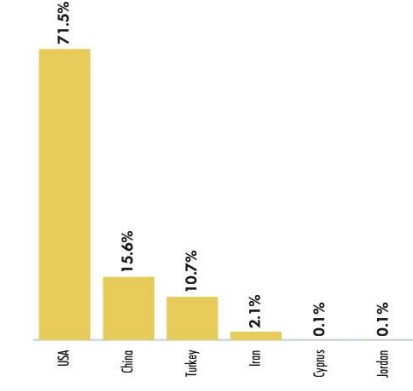
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The number of Global Elite 1000 retailers based in each country



## Web traffic from consumers in the Middle East to the largest retailers in the region

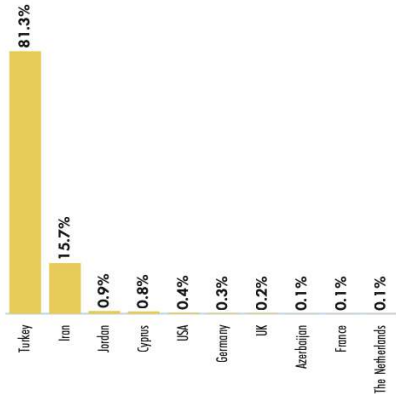
Data is split according to the country where the retailer is headquartered



Note: Retailers in the Middle East Largest 15 are selected based on Middle Eastern consumer web traffic. Data based on 85% of the largest 15. Source: RetailX, drawing on data from StatistaWeb

© 2022 RetailX, drawing on data from StatistaWeb

## Countries from which shoppers visit the Middle East-based Largest 15



Note: There are 7 Middle East-based retailers among the Middle East Largest 15. The Largest 15 are selected based on Middle Eastern consumer web traffic. Data based on 85% of the largest 15. Source: RetailX, drawing on data from StatistaWeb

© 2022 RetailX, drawing on data from StatistaWeb

# NORTHEAST ASIA

China is no longer the sleeping dragon. Its retailers are reaching out to consumers around the world, while global brands continue to build a Chinese customer base. This is especially true for luxury brands keen to reach the region's Millennials and Gen Z. By 2025, these age ranges are predicted to account for more than 40% of luxury market purchases.

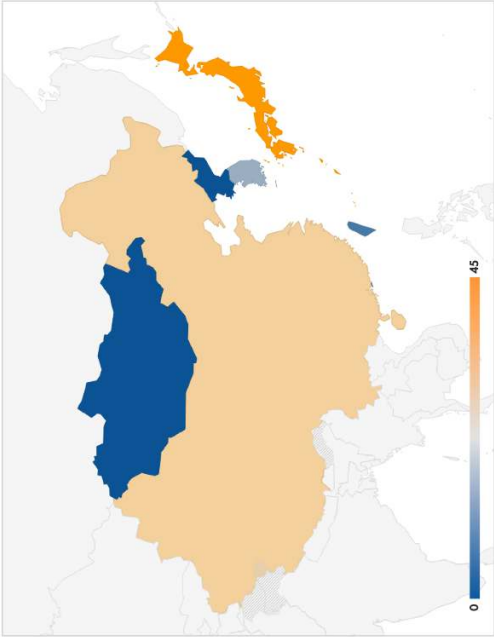
While Alibaba's Tmall has enabled brands to reach Chinese consumers easily, its AliExpress platform has taken China to the world. AliExpress appears in the listing of the Largest 15 retailers by web traffic in nine of the ten global regions in this report and it continues to grow. As an example, it is currently expanding payments and delivery capabilities in Brazil, where ecommerce is seeing rapid growth following the pandemic. The Chinese platform reported its largest ever Black Friday in Brazil in 2021, with orders, customers and gross merchandise values all increasing. In fact, sales during the first six and a half hours exceeded those made over the entire day the previous year.

Retailers headquartered in Northeast Asia are popular with Brazilian consumers. 5.8% of the web traffic received by the Largest 15 originates in Brazil. Only consumers in Russia, accounting for 9% of traffic, and China (25.1%), are more likely to shop with Northeast Asian brands and retailers.

For all of its international reach, AliExpress ranks within the Top 100 of the RetailX Global Elite. Above it, in a Top50 position, is Japanese brand Muji. This multi-category retailer, which sells across segments from fashion and stationery to beauty and furniture, has bricks-and-mortar stores and ecommerce sites across Europe, Asia, Australia, the Middle East and North America. Its philosophy of 'No brand quality goods' translates to simple products that are useful and eliminate excess. The website reflects this ethos.

Of the 101 retailers and brands from this region that rank within the Global Elite 1000, 45 of them are headquartered in Japan. These include Asics, Rakuten and Sony. 15 are from Korea and 29 from China.

The number of Global Elite 1000 retailers based in each country

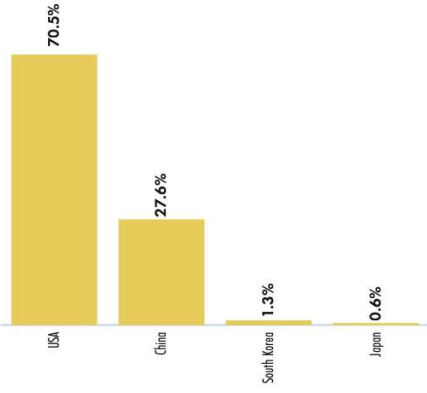


Source: RetailX

- A sample of the 101 Northeast Asian retailers included in the Global Elite 1000
- Muji..... Top\_0050
  - Samsung..... Top\_0050
  - Shien..... Top\_0100
  - AliExpress..... Top\_0100
  - Asics..... Top\_0100
  - Rakuten..... Top\_0100
  - Coupons..... Top\_0100
  - Alibaba.com..... Top\_0100
  - Tmall..... Top\_0100
  - Taobao..... Top\_0100
  - DJI..... Top\_0150
  - Bang Good..... Top\_0150
  - Lenovo..... Top\_0150
  - Sony..... Top\_0150
  - JD.ID..... Top\_0250
  - Wondershare..... Top\_0250
  - YesStyle..... Top\_0250
  - GMMarket..... Top\_0250
  - Auction..... Top\_0250
  - Buyee..... Top\_0250

Web traffic from consumers in Northeast Asia to the largest retailers in the region

Data is split according to the country where the retailer is headquartered



Note: Retailers in the Northeast Asia Largest 15 are ranked based on missing consumer web traffic. Data based on 87% of the Largest 15. The Largest 15 is ranked based on missing consumer web traffic. Data based on 86.7% of the Largest 15. Source: RetailX, drawing on data from Statista

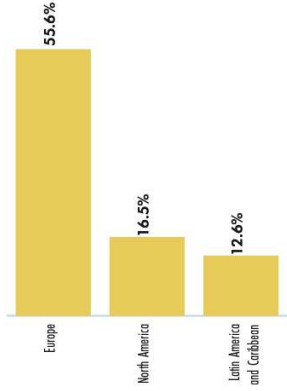
© 2022 retailx.net, distributed by InternetRetailing.net

The Largest 15 retailers, by Northeast Asian web traffic

| RETAILER            | HQ REGION      |
|---------------------|----------------|
| ALIEXPRESS          | NORTHEAST ASIA |
| AMAZON              | NORTH AMERICA  |
| APPLE               | NORTH AMERICA  |
| BIGAMART            | EUROPE         |
| COMP.ZONE           | NORTHEAST ASIA |
| DOSPARA             | NORTHEAST ASIA |
| EBAY                | NORTH AMERICA  |
| FUN SHOP            | NORTHEAST ASIA |
| GOOGLE PLAY         | NORTH AMERICA  |
| GS SHOP             | NORTHEAST ASIA |
| IF MALL             | NORTHEAST ASIA |
| LOTTE HOME SHOPPING | NORTHEAST ASIA |
| MICROSOFT           | NORTH AMERICA  |
| STEAM               | NORTH AMERICA  |
| TAOBAO              | NORTHEAST ASIA |

Source: RetailX, drawing on data from Statista

Non-domestic web traffic to Northeast Asia-based retailers



Note: Regions outside Northeast Asia generating the most web traffic for the Leading 8 retailers headquartered in Northeast Asia. Source: RetailX, drawing on data from Statista

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## SOUTH ASIA

While North American retailers have made inroads into South Asia, for retailers within the region, their domestic countries form a higher percentage of their market than cross-border sales.

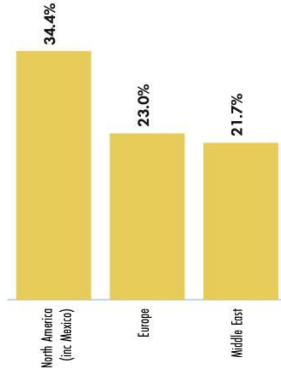
Ecommerce accounts for 6% of India's total retail market but it's a market dominated by just two marketplaces – Flipkart and Amazon. Despite Flipkart being headquartered in India, ownership is more than 80% held by Walmart. In 2021, it raised \$3.6bn and is rumoured to be looking towards an IPO in 2023 with a market valuation of \$70bn.

Since launching in 2007, Flipkart has built up a hold of almost 40% of the Indian ecommerce market, selling more fashion than Amazon due to its acquisitions of Myntra and Jabong, and selling a similar amount from the consumer electronics and smartphone categories. In a similar move to Amazon elsewhere, Flipkart has opened its logistics network to other Indian merchants and continues to invest in new innovations for ecommerce. A newly launched innovation lab will test use cases for web3, metaverse, NFTs and blockchain alongside customer experience, logistics, supply chain and future digital commerce.

However, the power of Amazon India and Flipkart – as well as the smaller Indian marketplace, Snapdeal – is about to be disrupted. The Indian government has launched a pilot phase of an open-source platform to challenge the position of these mega markets and to help smaller retailers worried about the monopoly that Amazon and Flipkart will have on retail as ecommerce continues to grow.

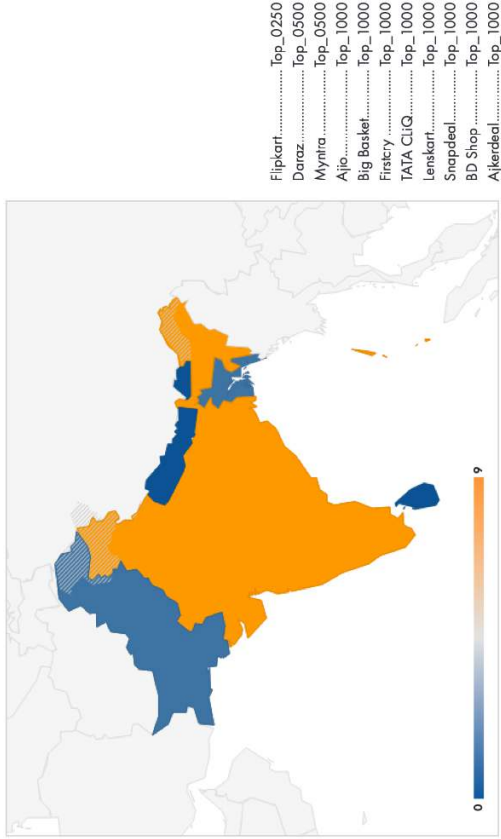
Open Network for Digital Commerce (ONDC) is linking buyers and sellers locally in the five Indian cities of Delhi NCR, Bengaluru, Bhopal, Shillong and Coimbatore. Categories of goods being sold include grocery, food order and delivery, hotel bookings and travel. Because of its open source nature, sellers and customers will not be restricted to a single platform. With the likes of Amazon, Flipkart and the fast delivery companies having to register to use ONDC, it's hoped that it will provide more of a level playing field for smaller retailers.

### Non-domestic web traffic to South Asia-based retailers



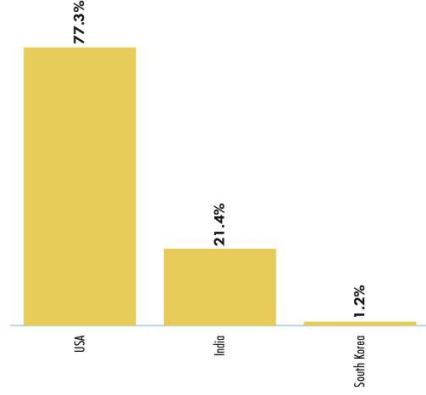
Note: Regions outside South Asia generating the most web traffic for the leading 5 retailers headquartered in South Asia. Source: RetailX, drawing on data from StatistaWeb © 2022 RetailX, drawing on data from StatistaWeb

The number of Global Elite 1000 retailers based in each country



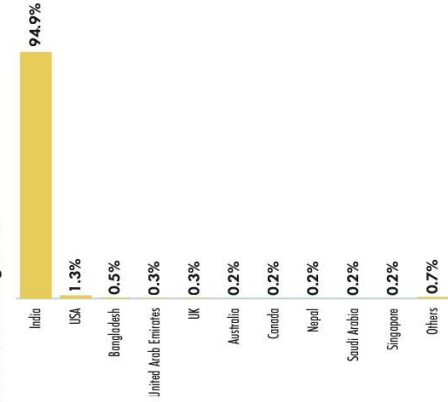
### Web traffic from consumers in South Asia to the largest retailers in the region

Data is split according to the country where the retailer is headquartered



Note: Retailers in the South Asia Largest 10 are selected based on South Asian consumer web traffic. Source: RetailX, drawing on data from StatistaWeb © 2022 RetailX, drawing on data from StatistaWeb

### Countries from which shoppers visit the South Asia-based Largest 10



Note: There are 5 South Asia-based retailers among the South Asia Largest 10. The largest 10 are selected based on South Asian consumer web traffic. Source: RetailX, drawing on data from StatistaWeb © 2022 RetailX, drawing on data from StatistaWeb

# SOUTHEAST ASIA

Some retailers that are headquartered in Southeast Asia amass large quantities of web traffic from consumers in the region. Ezbuy, which has its headquarters in Singapore, Vietnam's FPT Shop and OfficeMate from Thailand all appear in the list of the Largest 15 retailers in the region in terms of web traffic.

However, with 88.1% of the traffic, it is the US-based retailers that receive the majority of the attention from consumers in the region. China's AliExpress receives 8.1% of the overall consumer web traffic to the Largest 10 in the group, while the Southeast Asia trio attract less than 4%.

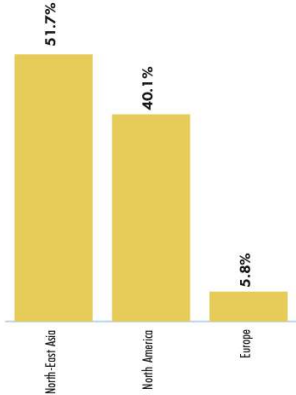
A certain level of cross-border trade takes place in the region. Ezbuy includes a page for its cross-border shipping service, with buyers paying sellers directly for any extra delivery costs due to shipping goods from China, Taiwan, Korea or the US, thus bringing global products to its local customers. To date, the company has 3m customers in Singapore, Malaysia, Indonesia and Thailand.

The companies also see people browsing from the US, Taiwan, Honk Kong, China and the UK.

Web traffic is only part of the measure for entry into the RetailX Global Elite listing. While the three companies rank as Top 1000 retailers, there are others in the region appearing higher. For example, The Gnoi Di Dong ranks within the Global Top 50. The consumer electronics retailer is part of MWG, Vietnam's largest retail group by revenue and profit. It operates a store estate of more than 4,500 bricks-and-mortar stores in Vietnam, with more in Cambodia.

Analysis of the ecommerce sites of retailers operating in the region highlights how many have been working to recently improve their merchandising. Overall, merchandising such as recommending complementary products, search relevance and the level and standard of product information could be seen as lacking when compared to retailers in other regions. However, since February 2020, retailers in this region are the most likely in the world to have invested in improving this area.

## Non-domestic web traffic to Southeast Asia-based retailers



Regions aside, Southeast Asia generated the most web traffic for the listing's 3 retailers headquartered in Southeast Asia.  
Source: RetailX, drawing on data from StatistaWeb

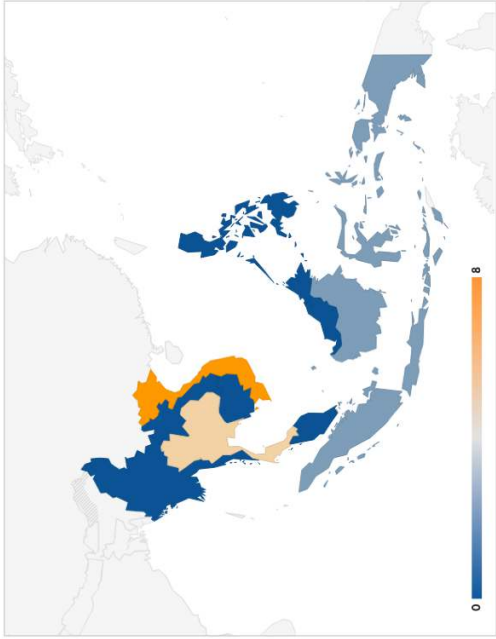
© 2022 RetailX, drawing on data from StatistaWeb

## The Largest 15 retailers, by Southeast Asian web traffic

| RETAILER    | HQ REGION      |
|-------------|----------------|
| ALIEXPRESS  | NORTHEAST ASIA |
| AMAZON      | NORTH AMERICA  |
| APPLE       | NORTH AMERICA  |
| BIGMART     | EUROPE         |
| CARREFOUR   | EUROPE         |
| EZBUY       | SOUTHEAST ASIA |
| FPTSHOP     | SOUTHEAST ASIA |
| GOOGLE PLAY | NORTH AMERICA  |
| LENSKART    | SOUTH ASIA     |
| MICROSOFT   | NORTH AMERICA  |
| OFFCEMATE   | SOUTHEAST ASIA |
| SNAPDEAL    | SOUTH ASIA     |
| STEAM       | NORTH AMERICA  |
| TARGET      | NORTH AMERICA  |
| UBUY        | SOUTH ASIA     |

Source: RetailX, drawing on data from StatistaWeb

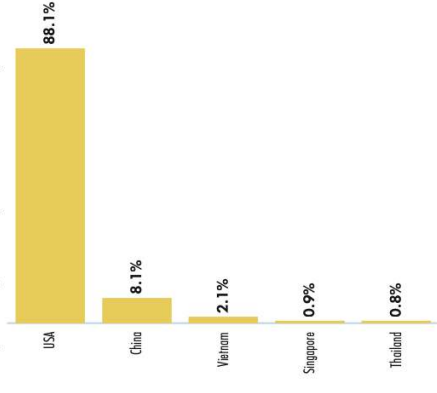
The number of Global Elite 1000 retailers based in each country



Source: RetailX

## Web traffic from consumers in Southeast Asia to the largest retailers in the region

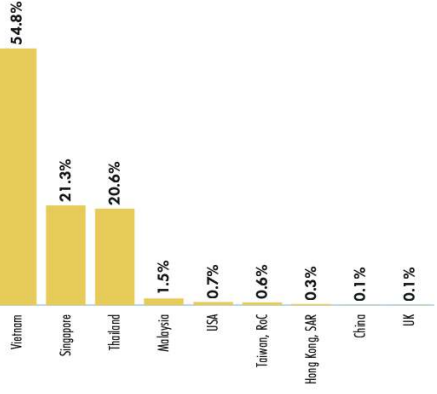
Data is split according to the country where the retailer is headquartered



Note: Retailers in the Southeast Asia Largest 10 are selected based on Southeast Asian consumer web traffic.  
Source: RetailX, drawing on data from StatistaWeb

© 2022 RetailX, drawing on data from StatistaWeb

## Countries from which shoppers visit the Southeast Asia-based Largest 10



Note: There are 3 Southeast Asia-based retailers among the Southeast Asia Largest 10. The Largest 10 are selected based on consumer web traffic.  
Source: RetailX, drawing on data from StatistaWeb

© 2022 RetailX, drawing on data from StatistaWeb

# AUSTRALASIA

There are more Australian retailers in the Global Elite 1000 than from any other country in this region. That said, none of Australasia's retailers appear above the level of Top 100 and the majority of web traffic from its consumers flows predominantly towards US-based retailers. Chinese retailers attract more web traffic from Australian consumers than the domestic retailers appearing among the region's largest 15 by web traffic grouping.

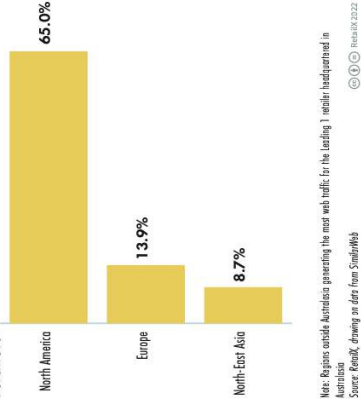
These retailers also tend to have less heft among consumers from overseas since most of their traffic originates in Australia (96.2%) and New Zealand (2%). Of the overseas web traffic directed towards these Australia-headquartered retailers, the majority comes from North America (65%).

Domestically, the last couple of years have seen an increase in the number of consumers shopping online, as well as the frequency with which they do so. Both grocery and non-food retailers have seen an increase in online trade, mainly due to the pandemic. Online's share of total retail in Australia has risen from 6.6% in February 2020 to 10.4% in February 2022, according to government statistics. Grocers have seen ecommerce rise from 3.4% of the total in February 2020 to 5.7% in February 2022, while non food has risen from 10.9% to 16.1%.

The growth rate is slowing but 2022's more stable climate enables retailers to build on the unprecedented rise of the previous two years. Retail giant Kogan is among the group of retailers with the highest level of web traffic in the region and two marketplace operations in the Global Elite ranking – Kogan.com and New Zealand's Mighty Ape. The retail group continues to report strong sales, with a 19.4% compound annual growth rate in gross sales since the third quarter of 2020. It hopes to leverage growth by scaling its Kogan First customer loyalty programme.

The importance of customer retention and the customer experience become more apparent when you take into account that while 80% of Australian households shop online – amounting to 9.2m households – around half of all online purchases are made by just 1.4m people, according to Australia Post.

## Non-domestic web traffic to Australasia-based retailers

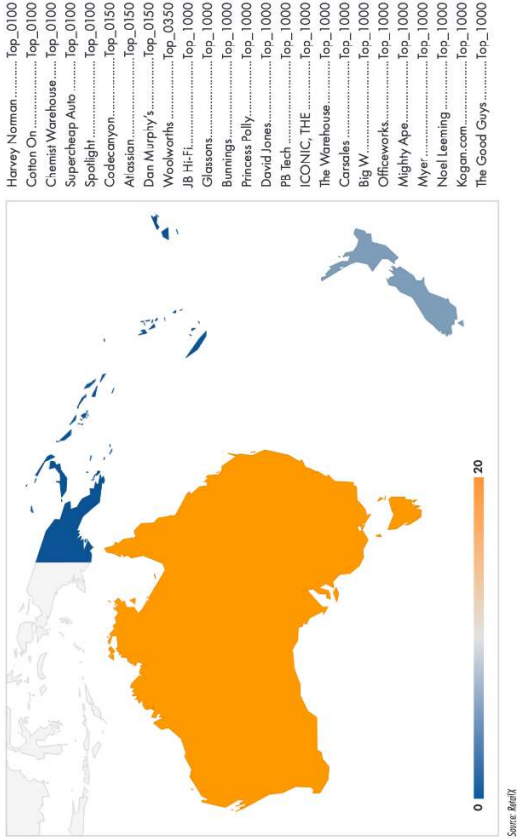


## The Largest 15 retailers by Australasia web traffic

| RETAILER     | HQ REGION       |
|--------------|-----------------|
| 1-DAY        | NORTH AMERICA   |
| ALIEPRESS    | NORTH EAST ASIA |
| AMAZON       | NORTH AMERICA   |
| APPLE        | NORTH AMERICA   |
| CARREFOUR    | EUROPE          |
| COISCOUNT    | EUROPE          |
| EBAY         | NORTH AMERICA   |
| ETSY         | NORTH AMERICA   |
| FC MANTIS    | EUROPE          |
| FRUGO        | EUROPE          |
| KWART        | AUSTRALASIA     |
| KOGAN.COM    | AUSTRALASIA     |
| LIDL         | EUROPE          |
| MATERIEL.NET | EUROPE          |
| MICROSOFT    | NORTH AMERICA   |

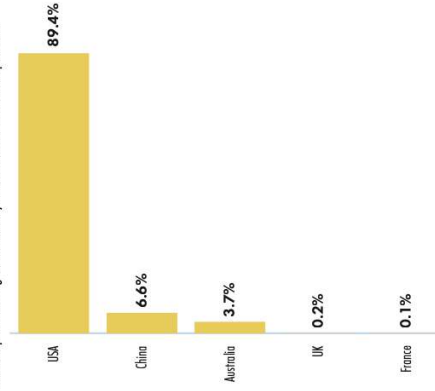
Source: RetailX, drawing on data from StatistaWeb

The number of Global Elite 1000 retailers based in each country



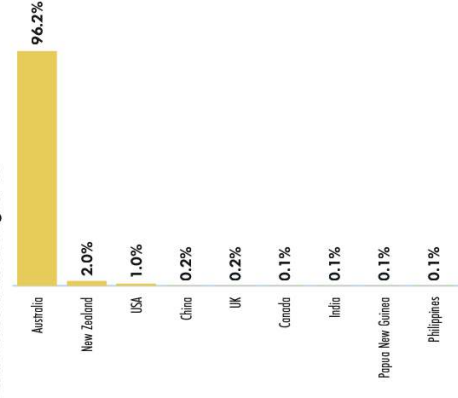
## Web traffic from consumers in Australasia to the largest retailers in the region

Data is split according to the country where the retailer is headquartered



Note: Retailers in the Australasia Largest 15 are selected based on Australian consumer web traffic.  
Source: RetailX, drawing on data from StatistaWeb © RetailX 2022

## Countries from which shoppers visit the Australasia-based Largest 15



Note: There is 1 Australasia-based retailer among the Australasia Largest 15.  
The Largest 15 are selected based on Australian consumer web traffic.  
Source: RetailX, drawing on data from StatistaWeb © RetailX 2022

## REST OF THE WORLD

The countries that don't fit into other regions have been brought together under the category of Rest of the World. These 25 countries include Afghanistan, Antarctica, the former Soviet republics of Kazakhstan, Kyrgyzstan and Tajikistan and Pacific Island nations Micronesia and Marshall Islands.

Antarctica, while having no permanent residents, is home to around 5,000 scientists and researchers during the continent's summer months. Its 'bricks-and-mortar' shops are mainly gift shops such as the UK Antarctic Heritage Trust store at Port Lockroy, which was hiring recently, or the general store at McMurdo Station. Internet access enables digital purchases to be delivered but even Amazon doesn't deliver physical goods.

Remoteness causes challenges with fulfilment to many of the countries in this region, since most are island nations thousands of miles from the warehouses of even of the world's largest retailers.

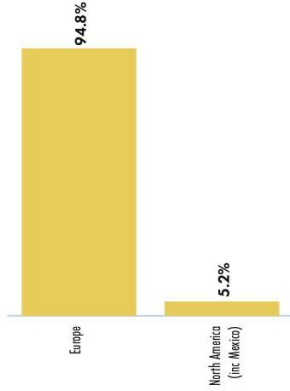
From a web traffic perspective, North American brands and retailers account for the largest share in the Rest of the World region. Amazon appears on the list of the Largest 15, as does eBay, Microsoft and The Home Depot. The addition of Steam in the list highlights the universal attraction that PC gaming has around the planet, while Google Play is the app of choice for Android-based smartphone users.

Four retailers from this list make it into the RetailX Global Elite ranking: Sulpak, Techno Dom, Shop and Kaspi. All are headquartered in Kazakhstan, therefore having easier access to neighbouring countries for cross-border trade. The majority of consumers visiting their ecommerce sites do so from within Kazakhstan, with a small percentage from Russia, Ukraine and the USA.

Sulpak, a member of the Euronics Group, sells consumer electronics and white goods as well as homewares, toys, books and car parts. Its ecommerce site includes product ratings and reviews, multiple payment options and click and collect or home delivery. It also operates a loyalty scheme.

Of all of the regions listed in this report, it is retailers in this one that score the highest for visual merchandising. They are also the most likely to recommend complementary products during browsing.

### Non-domestic web traffic to Rest-of-the-world-based retailers



Regions outside Rest-of-the-world guarantee the most web traffic to its leading 4 retailers headquartered in Rest-of-the-world.

Source: RetailX, drawing on data from StatistaWeb

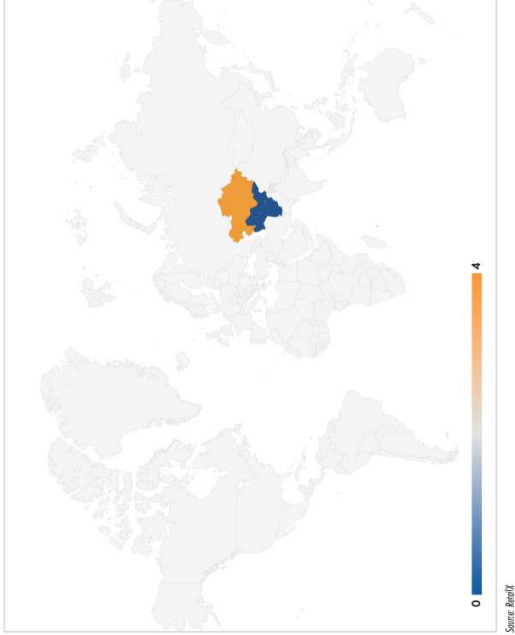
© 2022 retailx.net

### The Largest 15 retailers, by Rest of the World web traffic

| RETAILER       | HQ REGION      |
|----------------|----------------|
| ALIEPRESS      | NORTHEAST ASIA |
| AMAZON         | NORTH AMERICA  |
| CDISCOUNT      | EUROPE         |
| EBAY           | NORTH AMERICA  |
| FNAC           | EUROPE         |
| GOOGLE PLAY    | NORTH AMERICA  |
| THE HOME DEPOT | NORTH AMERICA  |
| KASPIKAZ       | REST OF WORLD  |
| LDIC           | EUROPE         |
| MICROSOFT      | NORTH AMERICA  |
| SHOP           | REST OF WORLD  |
| STEAM          | NORTH AMERICA  |
| SULPAK         | REST OF WORLD  |
| TECHNO DOM     | REST OF WORLD  |
| WILDBERRIES    | EUROPE         |

Source: RetailX, drawing on data from StatistaWeb

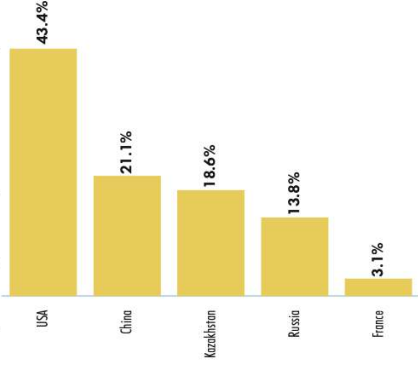
The number of Global Elite 1000 retailers based in each country



Sulpak.....Top\_1000  
Techno Dom.....Top\_1000  
Shop.....Top\_1000  
Kaspi.....Top\_1000

### Web traffic from consumers in the Rest-of-the-world to the largest retailers in the region

Data is split according to the country where the retailer is headquartered

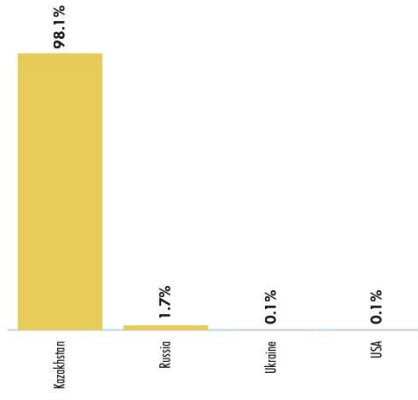


Note: Retailers in the Rest of the world Largest 15 are selected based on consumer web traffic from the Rest of the world region. Data is based on 87% of the Largest 15.

Source: RetailX, drawing on data from StatistaWeb

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### Countries from which shoppers visit the Rest-of-the-world-based Largest 15



Note: There are 4 retailers based in the Rest-of-the-world region among the Rest of the world Largest 15. The Largest 15 are selected based on the Rest-of-the-world consumer web traffic. Data based on 87% of the Largest 15.

Source: RetailX, drawing on data from StatistaWeb

© 2022 retailx.net

## AMAZON: PUTTING THE CUSTOMER FIRST

**Amazon**  
**Company:** Amazon  
**Headquartered:** USA  
**Founded:** 1994  
**Online:** www.amazon.com

**A company renowned for customer service, making things simple for customers while continually innovating**

Amazon's mission to be Earth's most customer-centric company extends across all areas of its business from logistics to analytics. It makes buying online simple for shoppers and "it just works" is a compliment often repeated. Since it started selling books online in 1994 Amazon has grown to become the second largest retailer in terms of turnover globally and by far the largest when figures for web traffic are viewed. It appears as a leading retailer in all regions as assessed by RetailX.

Getting things right for the customer has seen massive levels of investment and disruption of markets both for its own operations and in the product categories it has expanded into. Over the years these have included product ratings and reviews, one click checkout, Prime services and the introduction of Black Friday. And what Amazon starts other retailers soon adopt.

Sometimes Amazon has had to change industries supporting online ensuring control over costs and the customer experience. Logistics is one such area. Since the launch of Amazon Logistics

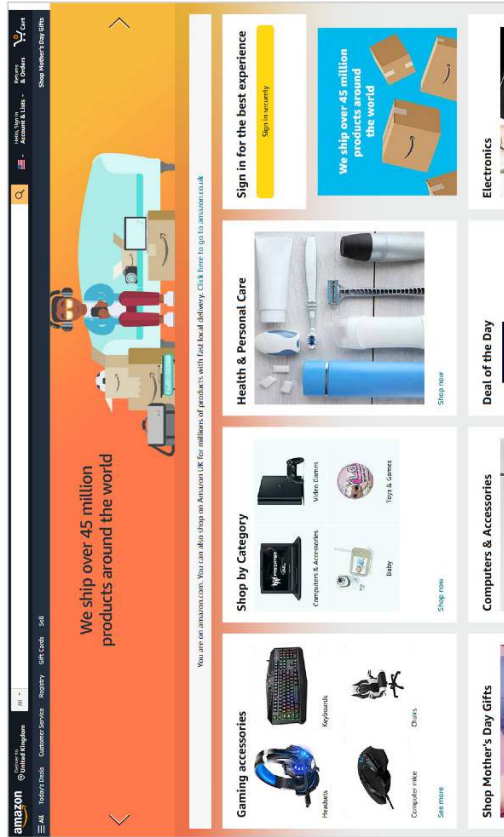
in the UK in 2012, the retailer has grown the business to become the second biggest carrier by volume in the UK. Only postal incumbent Royal Mail delivers more.

At the time of the launch of the logistics business, then Amazon UK CEO Chris North commented: "Amazon Logistics is not about replacing a carrier, it is about complementing. It is about expanding the total capacity in the UK for fast delivery."

And what works in one country is soon rolled out to others. Today, Amazon Logistics has its own airplanes, chartered ships and delivery operations worldwide and it continues to innovate with electric vehicles, drones and autonomous robots. It's no wonder that Amazon now defines itself as a tech company rather than a retailer.

In its latest financial year, to 31 December 2021, Amazon reported an increase in net sales of 22%, rising to \$469.8bn from 2020's \$386.1bn. 2020 was a very favourable year for Amazon as consumers turned to the online marketplace for many of their purchases as Covid 19 spread across the globe. Sales in 2020 were up almost 40% on the previous year.

Andy Jassy, CEO, Amazon thanked staff for their continued hard work as the huge increases in orders means they have been effectively operating in peak mode for almost two years. "When you combine how we're staffing and scaling our fulfilment network to bring even faster delivery to more customers, the extraordinary growth of AWS with 40% year-over-year growth, the addition of marquee new entertainment and a plethora of new capabilities that we're building in areas like Alexa, Ring, Grocery, Pharmacy, Amazon Care, Kuiper, and Zoox, there's a lot to look forward to in the months and years ahead," he said. ■



## MICROSOFT: SUSTAINING A GLOBAL VISION

**Microsoft**  
**Company:** Microsoft  
**Headquartered:** USA  
**Founded:** 1975  
**Online:** www.microsoft.com

**A vision for personal computing lead to global dominance and payback on sustainability**

Microsoft is synonymous with personal computing across the world. The company's Windows operating system holds almost three quarters of the global market, a position it has been building since the first 16-bit version of MS-DOS was introduced on an IBM PC on 12 August 1981.

Today, Microsoft employs 181,000 people around the world. The majority are in the US. Its revenue for its latest financial year, to 30 June 2021, was \$168.1bn, an increase of 18% over 2020's figure. Its mission "to empower every person and every organisation on the planet to achieve more" sees it involved in most industries and in many consumers' lives.

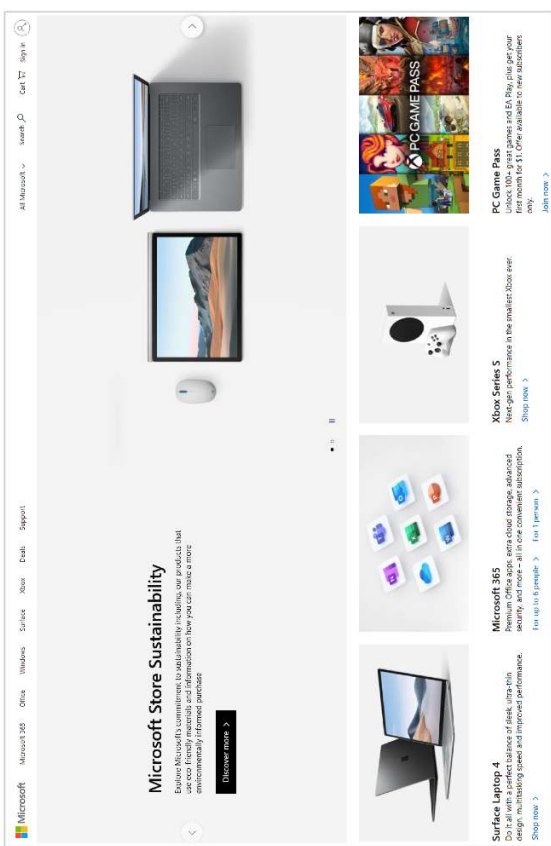
Its software, and hardware, extends across tablets, laptops, gaming (the Xbox launched in time for Christmas 2001), office apps and video meetings, security, cloud storage, and business

solutions available as one-off purchases or subscriptions. From AI to blockchain, Microsoft and its partner network are enabling solutions around the world.

The company is more than a retailer. It realises that its global presence comes with responsibility and this is being shown by its ambitions to give back to the planet through its own actions and as an enabler for other businesses. It plans to be net zero by 2030, to remove from the environment all the carbon the company has emitted either directly or by electrical consumption since it was founded by 2050, to help protect the biodiversity of the world's ecosystems, and help other businesses do the same.

Microsoft has been carbon neutral since 2012 and is further reducing the company's carbon footprint through its operations such as through the use of technology to double the efficiency of data centres, as well as reducing carbon emissions by more than half each year as well as removing more carbon that it emits. At least \$1bn is being invested in the development of carbon reduction and removal technologies, with the business being vocal on public policy initiatives to accelerate carbon reduction further.

It does not operate in a vacuum and is responsible for emissions throughout its supply chain and end use of its products. Many of its partners are also on a path to be net zero while also helping customers with tools such as Cloud for Sustainability, Emissions Impact Dashboard and Microsoft AppSource. ■



## ALIEXPRESS: BRINGING CHINESE SUPPLY AND MOBILITY TO THE WORLD

### AliExpress

**Company:** AliExpress

**Headquartered:** China

**Founded:** 2010

**Online:** [www.aliexpress.com](http://www.aliexpress.com)

### The Chinese dragon restructures around globalisation ambitions

AliExpress has grown from a B2B marketplace connecting Chinese suppliers to international markets into a global phenomenon, linking suppliers with merchants and consumers across borders and competing with Amazon, eBay and other marketplaces. Today, AliExpress connects consumers and merchants in 220 countries and regions in addition to China. Across Europe, it holds a 13% market share but this is larger in some markets than others.

The AliExpress site operates in 12 different languages with services including AI powered livestreams, real-time translations, interactive games and daily promotions localised to different markets. Behind the scenes, the marketplace is supported by the gamut of businesses under the wider Alibaba umbrella. These include payments, international delivery, logistics and warehousing.

Localisation and straightforward logistics have always been important to the business and its ambitions as an enabler of cross-border trade. For example, AliExpress and Alibaba's Cainiao Network partnered with Spain's national postal service Correos to better facilitate the movement of goods between China and Spain, while also supporting Spanish SMEs looking to sell to other markets in Europe and Latin America.

Promotions too are key and the marketplace highlights Chinese events as well as shopping events established in other

markets, customising each within a localised context and with entertainment. An 11.11 gala in France featured well-known French celebrities accompanied by pop-up studios on the site and interactive games giving consumers the opportunity to win prizes. Local influencers were engaged in Brazil with a TikTok challenge and in-app social sharing, while in Spain, the launch of a sixth AliExpress bricks-and-mortar store coincided with the event.

A reorganisation at AliExpress parent Alibaba at the end of 2021 emphasises the importance of international markets and globalisation to the company's strategy. The newly-formed International Digital Commerce division combines Alibaba's international consumer-facing and wholesale businesses AliExpress, Alibaba.com and Lazada and will drive synergies between the consumer and wholesale commerce platforms, helping it leverage supply chains, both locally and cross-border, and logistics networks. As the company says, "logistics network development is a priority in our globalisation strategy; as logistics is the fundamental infrastructure supporting a high-quality consumer experience based on integrated product supply from cross-border and locally."

The companies aim to increase their customer base from the current level of 1.24bn to two billion globally. It is currently growing at 20% year-over-year but has more work to do to reach consumers outside of China where its number of active customers has reached 953 million.

The person chosen to head up International Digital Commerce, former Taobao and Tmall president Jiang Fan, gives pointers to the group's ambitions. Under his leadership, the two most popular consumer marketplaces in China have transformed into mobile-first commerce ecosystems with an innovative user experience based around personalisation and content-driven engagement. ■

## GOOGLE: ACTIONING DATA INSIGHT

### Google

**Company:** Google

**Headquartered:** USA

**Founded:** 1998

**Online:** [www.google.com](http://www.google.com)

### Innovating to link digital channels to the rest of consumer life

How much does Google know about you? From online search to digital enabler through to operating home devices and connecting everything together, the US company has expanded into multiple areas of our work and business lives. Its mission is "to organise the world's information and make it universally accessible and useful".

It is this ambition to be useful – and wanting to solve humanity's biggest problems – that drives innovation, new ways to access and use information and turns information from data into something that is in itself useful. For example, Google Waze turns a map into a travel route that's updated in real-time as the situation on the roads ahead changes, while Person Finder, SOS alerts and maps combine to help in times of environmental crises. These examples are above the core of Google search and analytics that many people access on a daily basis.

Many of its other technologies, products and services hold

dominant market positions and the company is seen as one of the big five US technology companies. Its offerings extend to email, maps, digital media sharing, productivity, web browsing, translation, video calling, gaming, cloud computing, AI and machine learning.

As an enabler, Google bought Android in 2005 and the open source Android OS has grown to become the most widespread mobile operating system. It drives mobile devices from low end price points to premium Samsung models and Google's own smartphones to now account for almost 75% of the market.

Behind this is the Play Store, the mobile app store for Android devices, from which consumers can browse and download apps developed with the Android software development kit and published through Google. Digital media, such as books, music, films and television programmes can all be viewed and purchased from Google Play. These can then be played on Android, Chrome or Apple iOS devices. With a few exceptions, consumers can purchase from Google Play in every country from Albania to Zimbabwe.

Around three million apps are available covering every aspect of life from gaming and entertainment to communication and business tools, mobile payments and retail apps. Downloading from the store is simple; consumers need a Google account and to have registered a payment card.

Beyond this, its Google store sells devices ranging from the Pixel mobile phone to Nest smart home cameras, alarms and speakers. ■

## APPLE: AN ECOSYSTEM AHEAD OF ITS TIME

### Apple

|                                                                 |
|-----------------------------------------------------------------|
| <b>Company:</b> Apple                                           |
| <b>Headquartered:</b> USA                                       |
| <b>Founded:</b> 1976                                            |
| <b>Online:</b> <a href="http://www.apple.com">www.apple.com</a> |

### High margins with beautiful design and its own ecosystem

In January 2007 the iPhone was announced to the world by Apple's then CEO Steve Jobs. The phone, which was released in the US on 29 June that year, caused a stir with it becoming a trail blazer for mobile computing, phones and commerce. The first generation device had a 3.5 inch screen, 2 megapixel camera and a price of \$499 for the 4GB version. All of these specifications are low by the standards of Apple's most recent offering, the iPhone 13, which launched in September 2021. Sales figures for the iPhone's first year are also low by today's standards. Just over six million first generation phones were sold compared to 100 million iPhone 12s.

Most significant about the iPhone was the multitouch screen and the ease of use. The multifunction device – which incorporates a phone – was seen as a revolution and heralded as "tomorrow's technology today". The days of carrying around a flipflop, PalmPilot, BlackBerry or Nokia were coming to an end.

The following year, the 3G model was launched with the ability to access the faster network and the newly launched app store. Mobile commerce and internet browsing have never looked back. Nor have the other mobile phone developers or other industries. Where once consumers bought a music album, with the app store they could buy one song, software was no longer multifunctional, an app could do just one part.

While the iPhone itself and the app store set Apple apart from the rest of the industry, its bricks-and-mortar stores have also been revolutionary. Localised to different countries and regions, they showcase products in a way that other retailers didn't do. Personal service and help were paramount and queues for new product launches were born.

In 2021, sales of the iPhone, Mac computers, wearables and services reached new all-time highs, with revenue for the three months to December 25, 2021 reaching \$123.9bn. This record figure is 11% up on the previous year. "This quarter's record results were made possible by our most innovative lineup of products and services ever," said Tim Cook, Apple's CEO. "We are gratified to see the response from customers around the world at a time when staying connected has never been more important. We are doing all we can to help build a better world – making progress toward our goal of becoming carbon neutral across our supply chain and products by 2030, and pushing forward with our work in education and racial equity and justice."

Store

Mac

iPad

iPhone

Watch

AirPods

TV & Home

Only on Apple

Accessories

Support

unicef

Donate to support families affected by the war in Ukraine

iPhone 13 Pro

Oh. So. Pro.

Learn more > Buy >

## EBAY: CONNECTING BUYERS AND SELLERS

### eBay

|                                                               |
|---------------------------------------------------------------|
| <b>Company:</b> eBay                                          |
| <b>Headquartered:</b> USA                                     |
| <b>Founded:</b> 1995                                          |
| <b>Online:</b> <a href="http://www.ebay.com">www.ebay.com</a> |

### Remaining true to the customers that built the business

From the first sale, which was a broken laser pointer, eBay has grown from a consumer to consumer auction site to a global success for consumers, small eBay sellers and multinational brands alike. By the turn of the millennium, eBay had expanded internationally with sites localised for the UK, Germany and Australia, and today the platform is available in 180 countries worldwide.

Throughout its 27 year history, the company has kept its sellers and customers at its core, retaining the feel of the original business of connecting buyers and sellers. The business has grown larger, but this original idea holds true in 2022. Developments over the years have made it easier for those connections to be made especially with individual sellers becoming businesses in their own rights and retailers joining the platform.

Payments, delivery options such as the Global Shipping Programme for international deliveries, and opening up the platform through APIs enabling third party developers to build their own custom interfaces with unique functionality have all enabled eBay and its sellers to grow.

In 2000, the first eBay University course was held with classes in how to become mastersellers. It proved such a success that it continues to give classes today. 2000 was also the year that eBay introduced the 'Buy-it Now' button moving the platform from an auction site to include retail sales.

Some developments have been through acquisitions, making buying and selling easier for all involved. Over the years these include PayPal, Skype, Gumtree, ticketing site StubHub, and in 2011 ecommerce specialists GSI Commerce (now eBay Enterprise) and Magento, and later AI, machine learning and data analytics company Experimaker. It has also bought other marketplaces, including Asian platform Qoo10.jp to accelerate international expansion.

Buyers have not been forgotten. Price match guarantee and authenticated purchasing give security while innovations such as visual search help with browsing and purchasing. The soon to be launched eBay Vault will be surety to purchasers of trading cards and collectibles which can be stored forever in the vault with ownership transferred in seconds without needing to re-authenticate, re-package or ship the item elsewhere.

As eBay CEO Jamie Iannone commented: "We are building an eBay for the future by doubling down on what we do best – connecting sellers and buyers of non-new in season products. We see incredibly compelling growth potential in this market and believe it is our opportunity to win by sharpening our focus and continuing to create value through a tech-led reimagination of eBay. We have the right team and vision to deliver on our goals and continue returning value to our shareholders."

Home

Saved

Watchlist

My eBay

Shop by category

Search for anything

Get the Mother's Day coupon

Home & Garden

Electronics

Collectibles & Art

Home & Garden

Clothing & Accessories

Toys

Sporting Goods

Business & Industrial

Services & Machines

eBay Refurbished

The Mother's Day Sale is here

Save on select laptops, portable audio, and more for Mom.

Get the coupon

Extra 15% off

HP Laptop

Charge up the latest tech

Up to 60% off phones and more.

eBay stands with Ukraine

Play your vital support to those impacted by the crisis.

How to donate

## WHAT CONSTITUTES A RETAILER?

## DEFINITIONS

The multichannel landscape is more complex than merely 'having a website' or 'operating a store'. In choosing which companies to include in the RetailX Global Elite 1000, we have considered companies' intent, capabilities and activities around the recruitment and monetisation of customers. The definition of a 'retailer' for inclusion in our research is:

**DESTINATION:** the retailer has created a destination that, in the minds of customers, is a source of product, service or experience. Whether this destination is a shop, a site, a place, a time or an event, it's the sense of 'locus' that counts.

**FASCIA-FOCUSED:** the assessment focuses on individual trading names, rather than a parent company that may operate more than one brand. Since the group structure is invisible to customers, it does not have a bearing on the position of brands owned by a group. The challenge is to turn group capabilities into trading advantages that the customer would notice across brands.

**PURPOSE:** the retailer has created goods and/or services for the specific purpose of selling, for consumption by the purchasing consumer.

**MERCHANDISING:** the retailer actively sells and is not just a portal for taking customers' money. This means the selection, promotion and tailoring of retail offers for customers.

**ACQUISITION:** the retailer actively markets, recruits and attracts customers with a promise or proposition to the destination.

**SALE:** the retailer takes the customer's money. The retailer owns the transaction as the merchant of record.

**RECOURSE:** the retailer is responsible for the service, fulfilment and customer satisfaction owing from the sale.

## COMPANIES EXCLUDED FROM THE GLOBAL ELITE 1000

**PURE TRANSACTION/TARIFFS:** where ecommerce is ancillary to the primary purpose of a business, we will not necessarily include them. Online payment for gas or electricity is excluded since the purpose here is to supply energy. Travel companies are not included in the Top 1000. We have also excluded media-streaming services.

**BUSINESS-TO-BUSINESS AND DIRECT-SELLING BRANDS:** while the scope of retail is normally direct to the consumer, two trends are challenging this – the move for brands and previously solely B2B businesses to sell direct to consumers; and the increasingly retail-like behaviour of B2B brands, in terms of acquisition, promotion, personalisation and service. We have therefore included certain B2B businesses and direct-selling brands, which are also retailers.

## SOURCES

Flow of consumer web traffic towards domestic/foreign retailers

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## WORLD MAP

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## BUSINESS TYPES OF THE GLOBAL ELITE 1000

Countries where the Global Elite 1000 are based  
Share of companies in the Top500, by sector

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Number of companies in the Top500, by product category sold

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Worldwide web traffic to the Global Elite 1000, by country of retailer headquarters

Web traffic, by sector

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## NON-DOMESTIC WEB TRAFFIC TO NORTH AMERICA-BASED RETAILERS

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The Largest 15 retailers, by North America web traffic

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The number of Global Elite 1000 retailers based in each country of North America

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Web traffic from consumers in North America to the largest retailers in the region

Countries from which shoppers visit the North America-based Largest 15

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## THE LARGEST 15 RETAILERS, BY LATIN AMERICAN AND CARIBBEAN WEB TRAFFIC

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Number of Global Elite 1000 retailers based in each country in Latin America and the Caribbean

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## THE LARGEST 15 RETAILERS, BY EUROPEAN WEB TRAFFIC

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The Largest 15 retailers, by African web traffic

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The number of Global Elite 1000 retailers based in each country in Africa

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The Largest 15 retailers, by Middle East web traffic

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The number of Global Elite 1000 retailers based in each country in the Middle East

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Web traffic from consumers in the Middle East to the largest retailers in the region

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NON-DOMESTIC WEB TRAFFIC TO NORTHEAST ASIA-BASED RETAILERS

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The Largest 15 retailers, by Northeast Asian web traffic

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The number of Global Elite 1000 retailers based in each country in Northeast Asia

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Web traffic from consumers in Northeast Asia to the largest retailers in the region

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NON-DOMESTIC WEB TRAFFIC TO SOUTH ASIA-BASED RETAILERS

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The Largest 15 retailers, by South Asian web traffic

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The number of Global Elite 1000 retailers based in each country in South Asia

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The number of Global Elite 1000 retailers based in each country in Southeast Asia

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Web traffic from consumers in the Southeast Asia to the largest retailers in the region

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Countries from which shoppers visit the Southeast Asia-based Largest 10

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The Largest 15 retailers by Australasia web traffic

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The number of Global Elite 1000 retailers based in each country in Australasia

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The number of Global Elite 1000 retailers based in each country in the Rest of the world

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Web traffic from consumers in the Rest-of-the-world to the largest retailers in the region

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Countries from which shoppers visit the Rest-of-the-world-based Largest 15

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# IN CONCLUSION

The Global Elite 1000 highlights the levels of investment that retailers have been making in recent years not just in their digital channels but in the full customer-facing services and business operations that back up their marketing promises. This can be seen in the number of retailers, and marketplaces especially, that have expanded to cover the logistics of final mile deliveries.

This ability to embrace challenges, innovate and in some cases disrupt existing markets is what makes Elite and leaders in RetailX rankings stand out. They understand the full customer journey and the points of frustration and make adjustments accordingly. Having the data and ability to action insight goes alongside this understanding.

Those retailers with bricks-and-mortar stores have embraced omnichannel, being agile with store formats and channels while offering flexibility to customers enabling them to shop anyway they prefer each and every time. But even the leaders here are not staying still. They continue to move ever forward with plans to enhance their offering or get closer to customers.

Doing all this in one country and becoming a leader showcasing best practice is admiral. Scaling across a region while localising to different countries, consumer preferences and languages is an ambition for many, requiring strong leadership, vision and investment. Only a few have achieved this across the world and that is to be applauded.

The RetailX research team will continue to track the Global Elite retailers and brands for updates of this and other ranking, sector and country reports. They are always keen to ensure the way they analyse retail performance is up to date and provides data in a way that's informative and useful for readers. If you have suggestions of new metrics that our research should be tracking, or want to suggest new retailers – of any size – that we should track then do get in touch at [research@retailx.net](mailto:research@retailx.net). As always, our graphics are free to share under the Creative Commons licence detailed below and we encourage you to do so.

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| Editor-in-Chief & CEO             | Ian Jindal                                                                              | RetailX at InternetRetailing Media Services Ltd<br>123 Camen Street,<br>London, EC4N 5AU<br>Tel: +44 (0) 20 7862 2525<br>Printed in Great Britain.<br>ISSN 1759-0582<br><a href="http://www.retailx.net">www.retailx.net</a>                                                                                                                                                                                                                                                                                                                                                                                                              |
| DESIGN:                           |                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Graphics                          | Daniel Tero                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Cover Design                      | Julia Webber                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| MARKETING:                        |                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
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