



CTT e-Commerce Report 2020

Some market insights and new CTT's innovative initiatives

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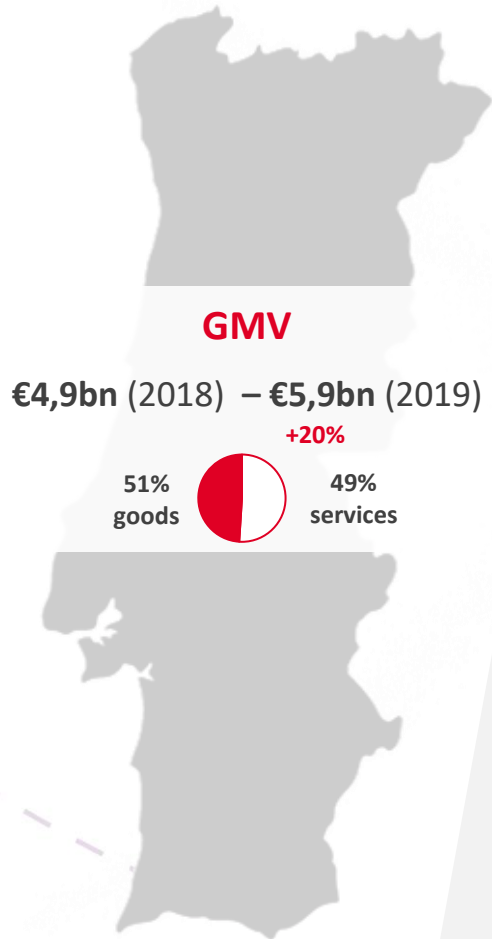
dinheiro vivo





a nossa entrega é total





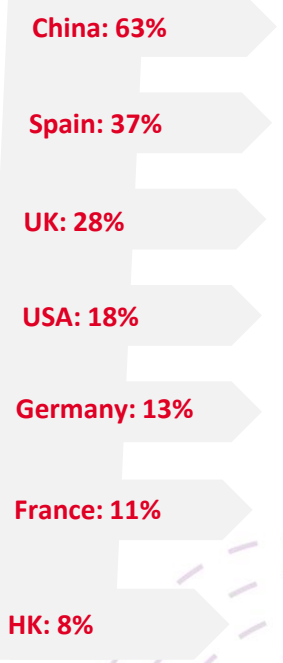
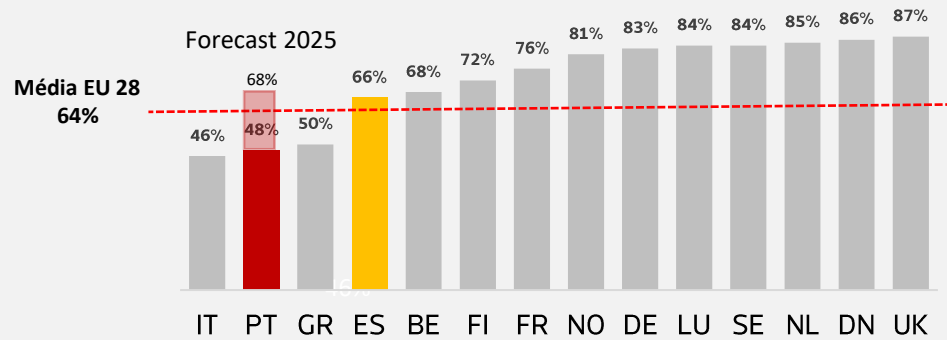
Cross-border in Portugal

- Portuguese ebuyers buy more and more in domestic stores
- But even so, > 80% Portuguese ebuyers buy in foreign online stores

Top ecommerce stores where the Portuguese do their shopping



Percentage of ebuyers in 2019

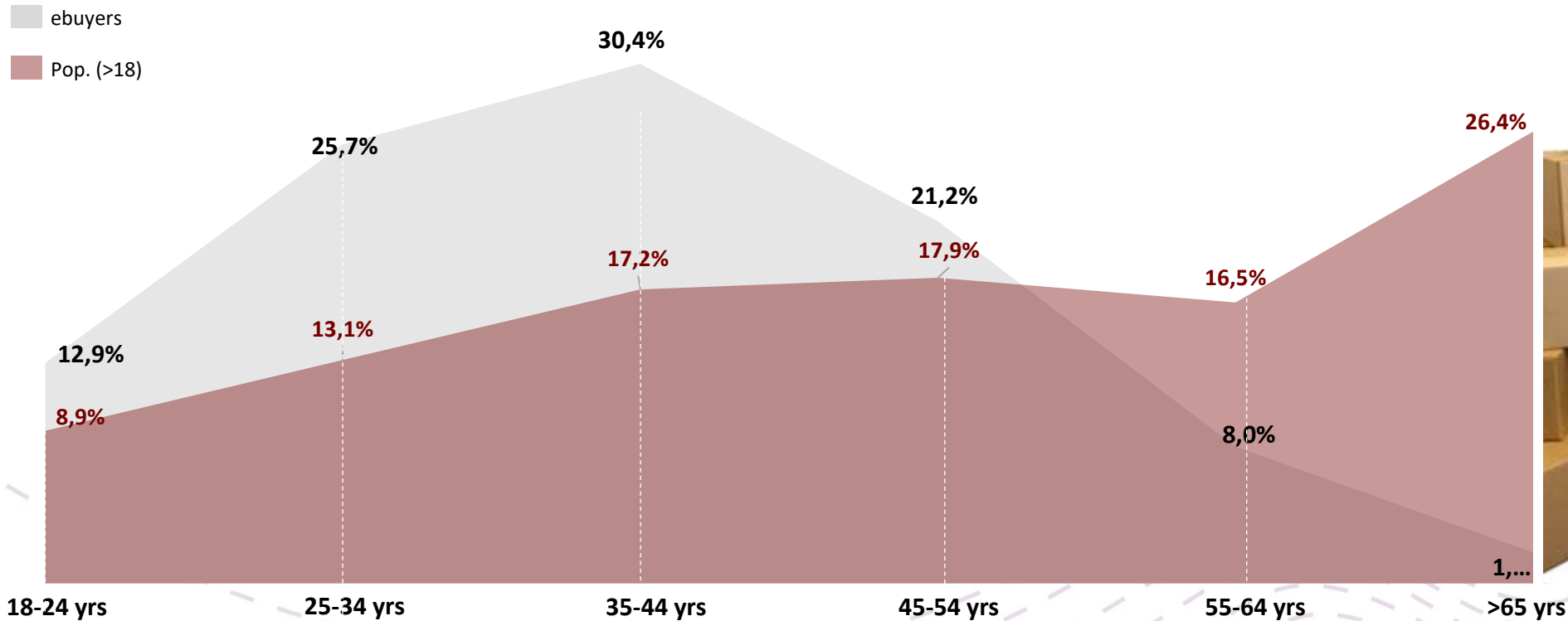


Relative low digital development of the the PT companies

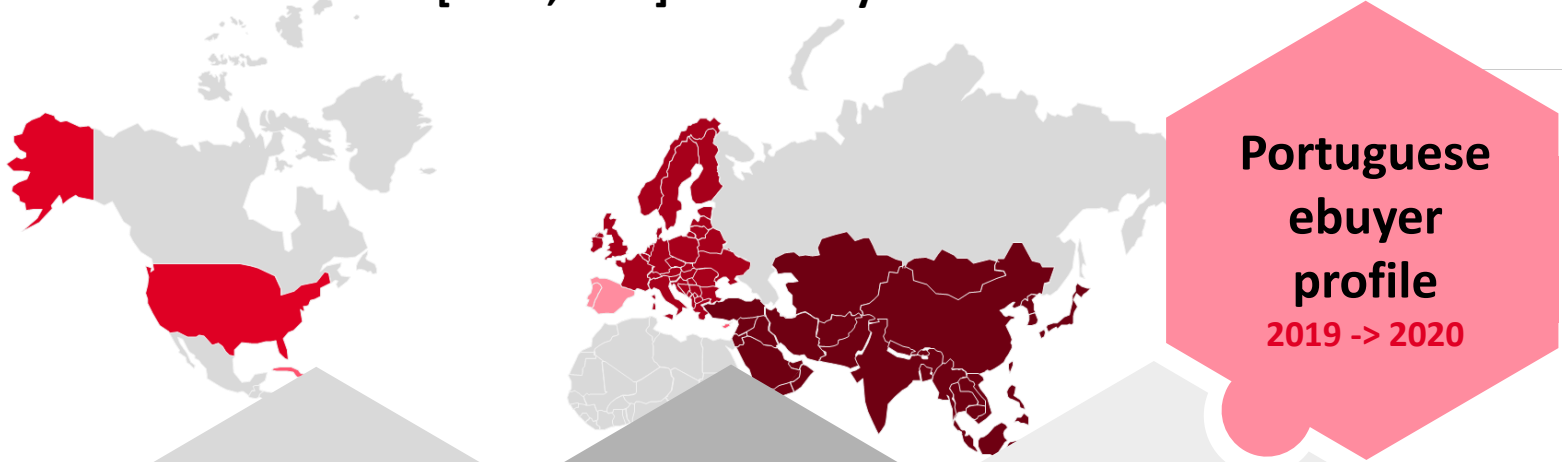
- 3-4% total retail (CN e KR >20-25%; RU, DK, NL,US 15%-20%)
- Only 39% of PT companies have presence online; and only 27% make business online

a nossa entrega é total

- **Middle and high classes** (C1, C2 e AB) show greater adhesion to online shopping
- **60% urban residents (Lisbon and Porto)** are more represented at online shopping
- **90,2%** of online shoppers are between the ages of **18-54** (**77,3%** between the ages **25-54**)



+ [10% ; 15%] new ebuyers in 2020



Average number of purchases of products (per year)

15,8 -> 19,5

Average number of products per purchase

3,8 -> 4,3

e-Commerce expense in products (per year)

807,2€-> 1103,7€

Average purchase value

51,1€ -> 56,6€

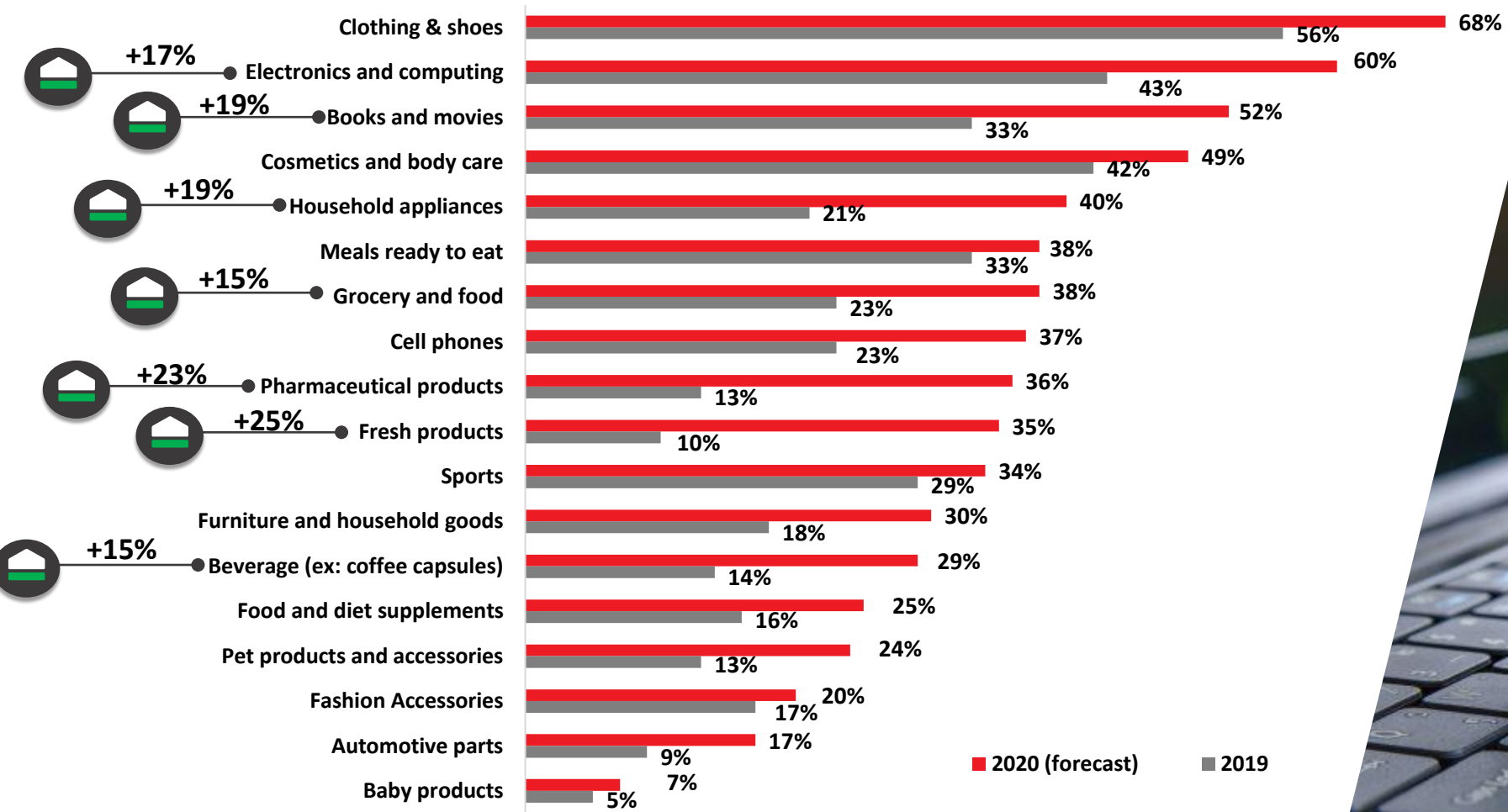
Product weight

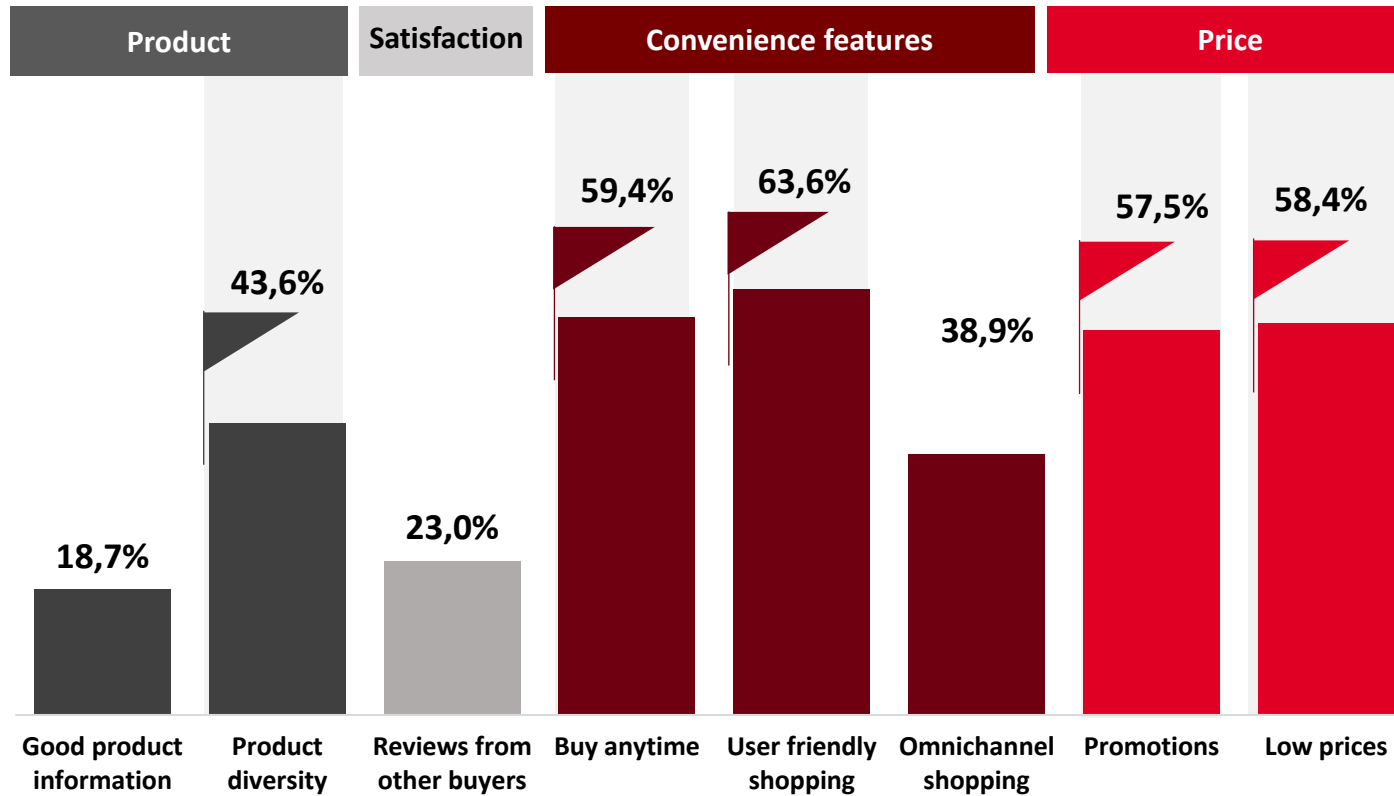
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50% -> 44%

Purchase frequency < 3 months

90% -> 95%

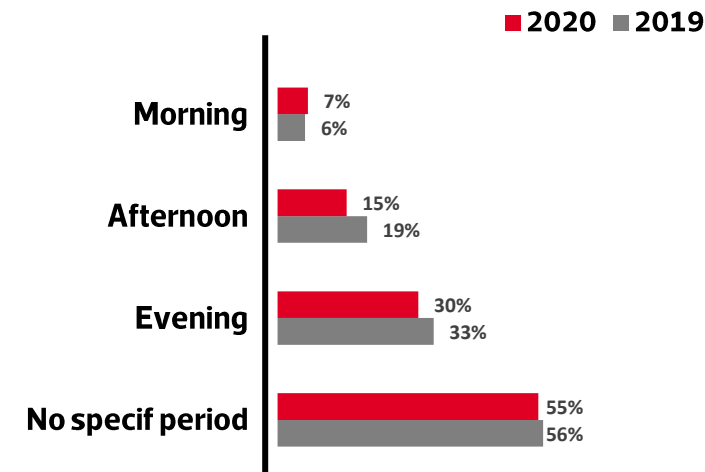
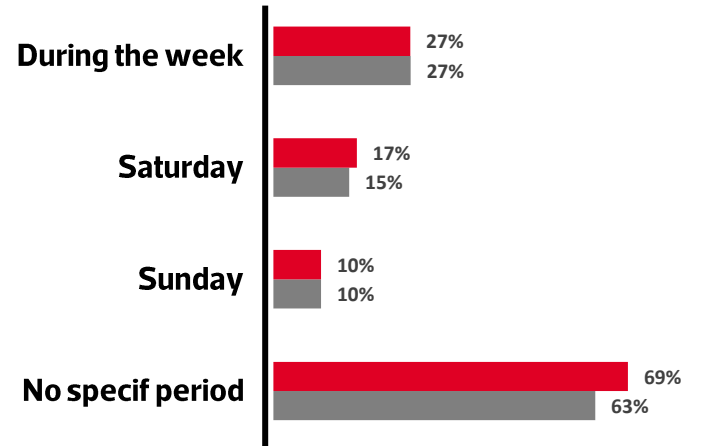
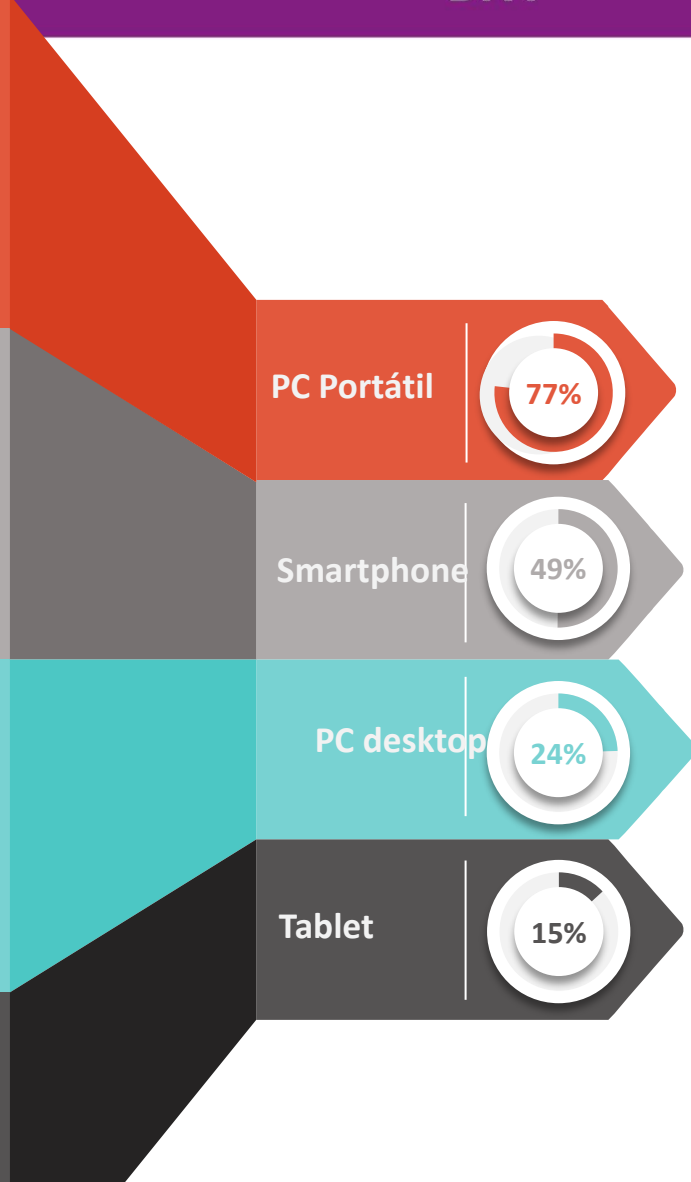






Fontes: Market Study "eCommerce Ibérico", CTT, 2020



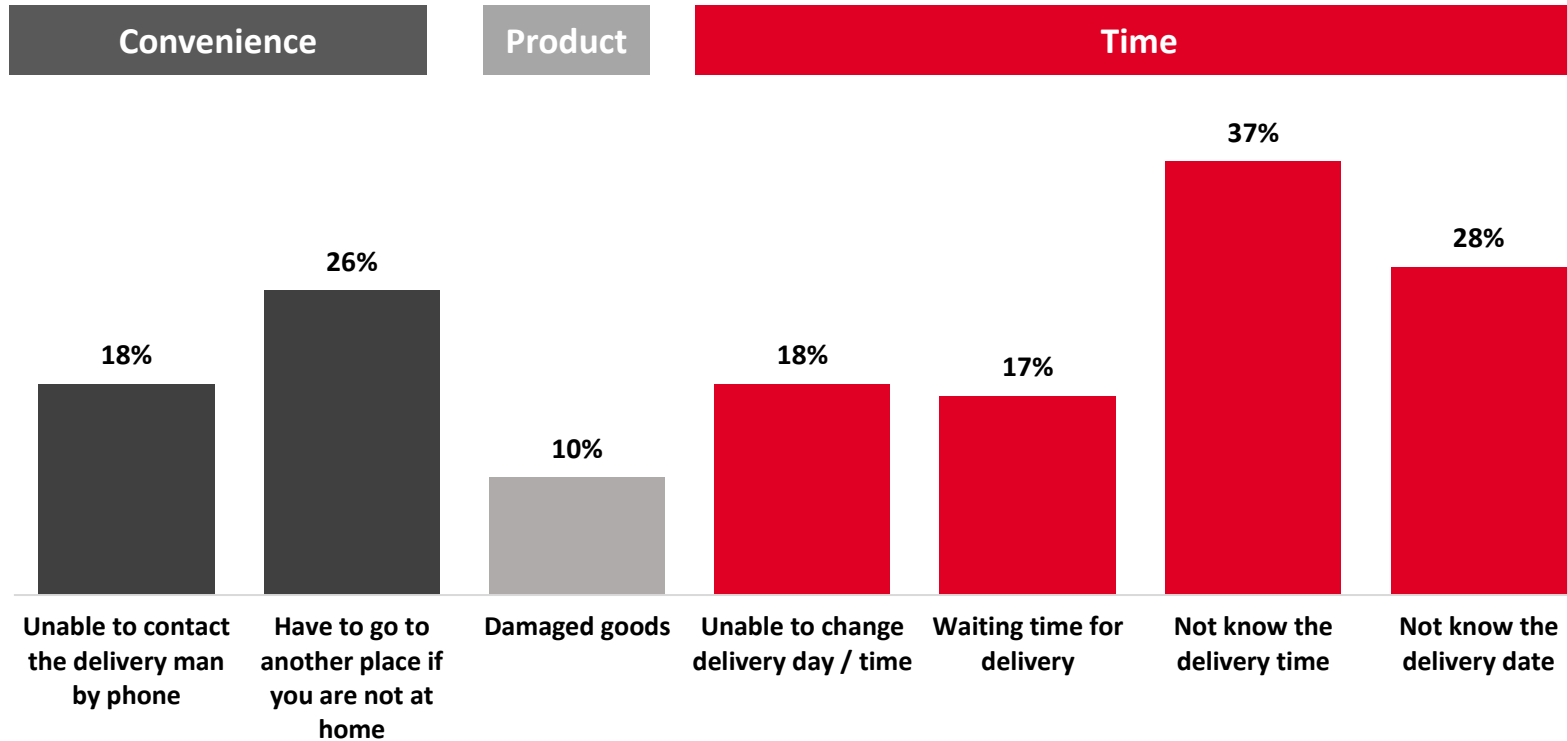




And abandoning the online purchase while searching?

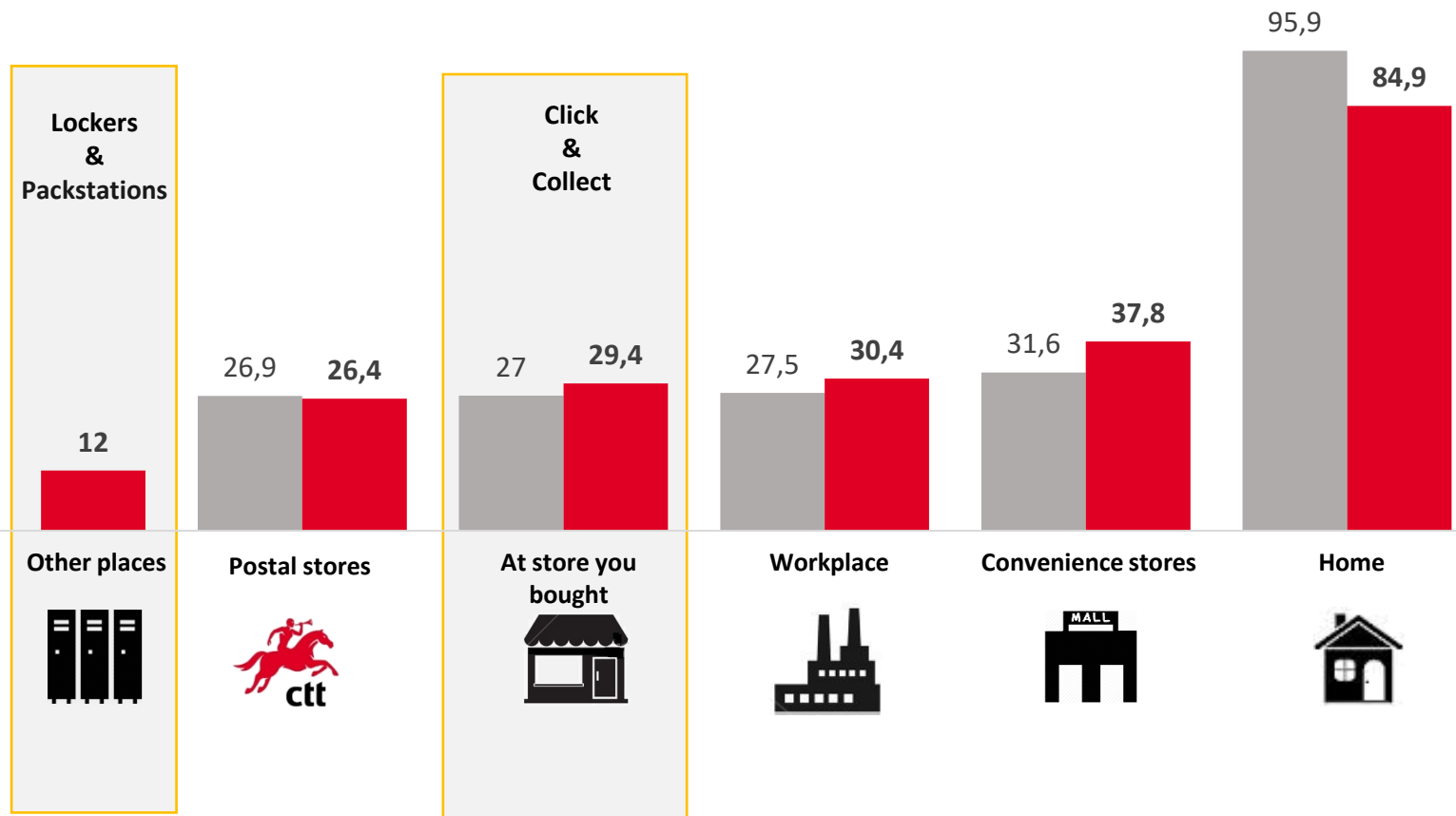
- 62% of ebuyers consider prices high
- 42% product information unclear

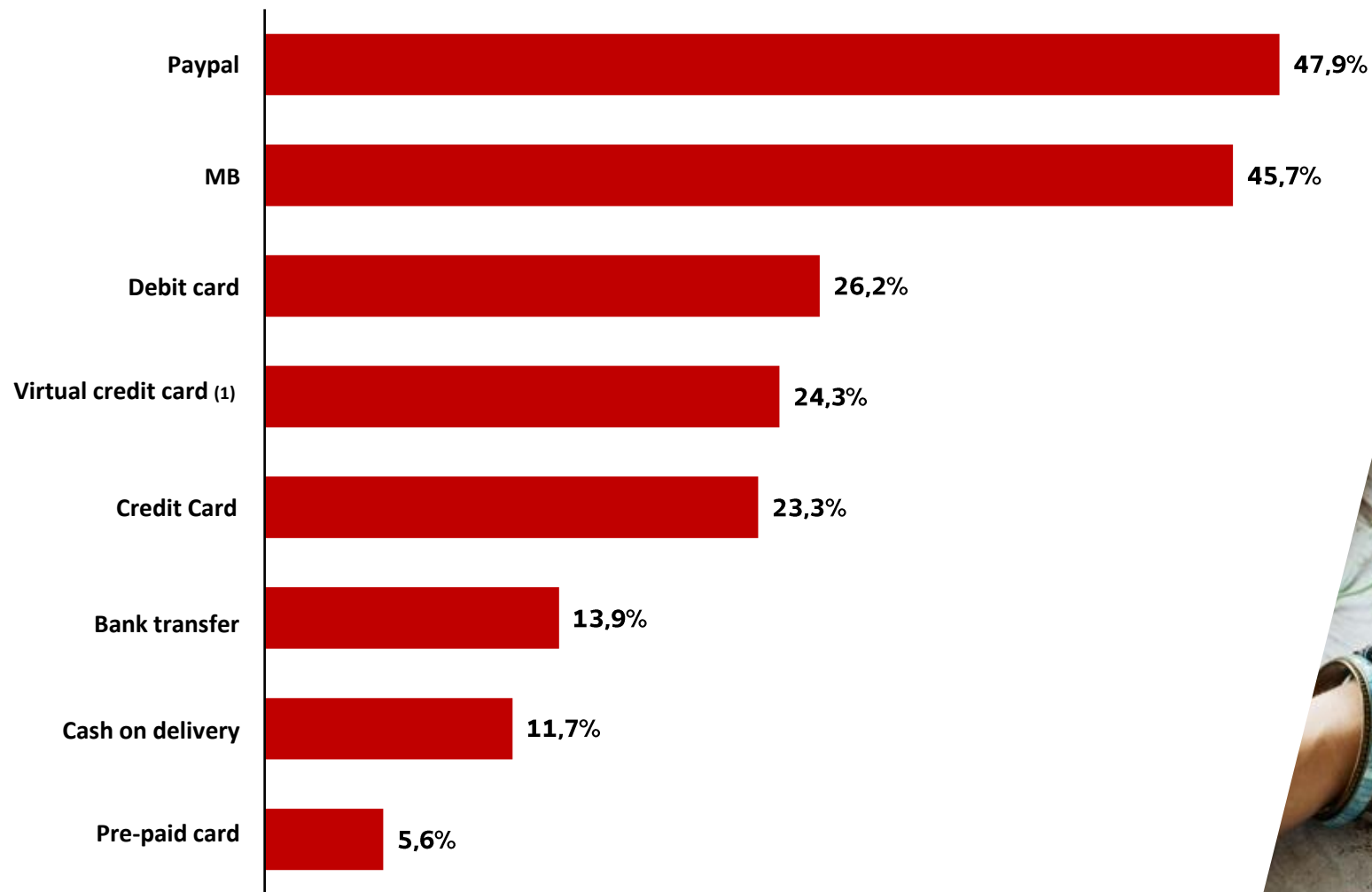
Which are the main constraints with the delivery experience?



Fontes: Market Study "eCommerce Ibérico", CTT, 2020

■ Where they actually receive
■ Where they want receive



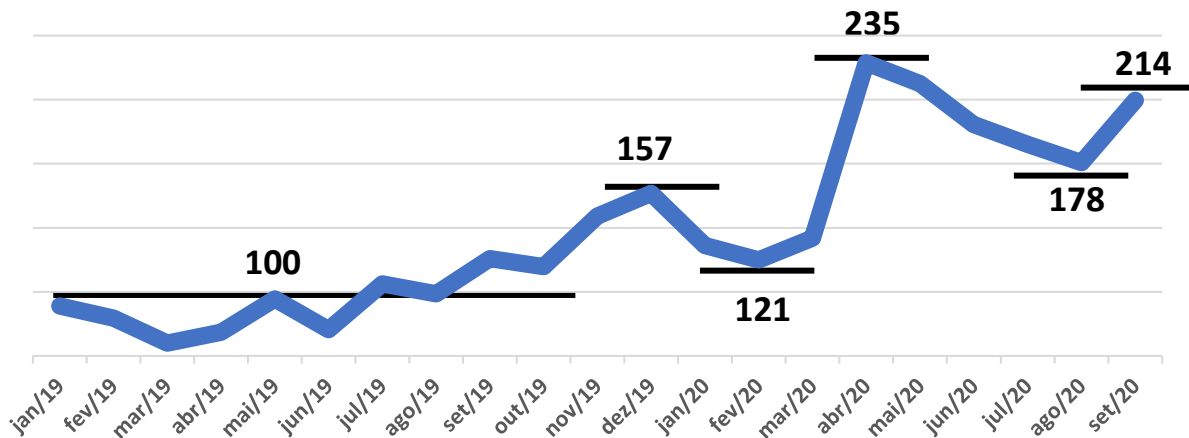


(1) –includes Mbnnet, Mbway, Revolut, etc.



1º Insight: Crescimento explosivo do e-commerce em PT

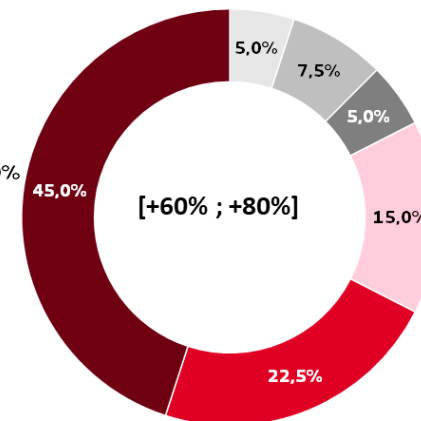
Trafego e-Commerce Portugal



Trafego e-Commerce Portugal

Fonte: Gab EC, CTT

- Reduziu as vendas
- Sem impacto nas vendas
- Aumento nas vendas inferior a 20%
- Aumento nas vendas entre 20% e 50%
- Aumento nas vendas superior a 50%
- Duplicou as vendas

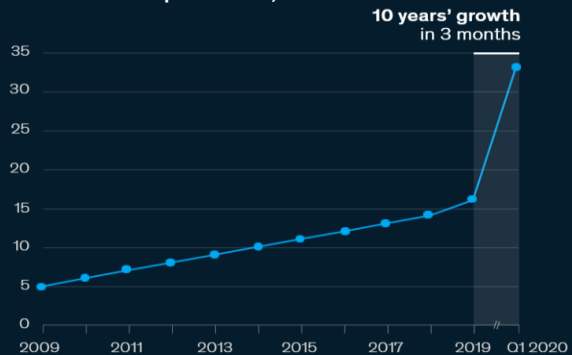


Efeito 1ª vaga COVID

The leap

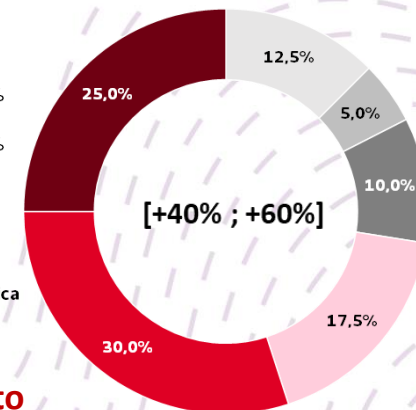
How fast is the world moving around us? Consider how quickly e-commerce has replaced physical channels in three months.

US e-commerce penetration, %



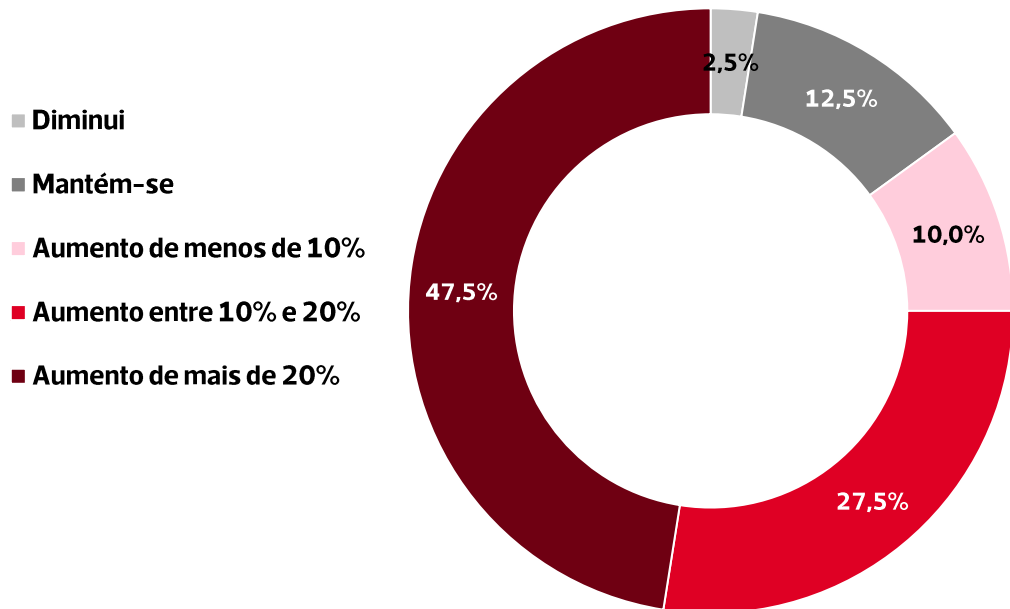
Source: Bank of America; Forrester Analytics; ShawSpring Research; US Department of Commerce; McKinsey analysis

- Crescimento anual inferior a 10%
- Crescimento anual entre 10% e 20%
- Crescimento anual entre 20% e 30%
- Crescimento anual superior a 30%
- Crescimento anual superior a 50%
- Crescimento anual mais do que duplica



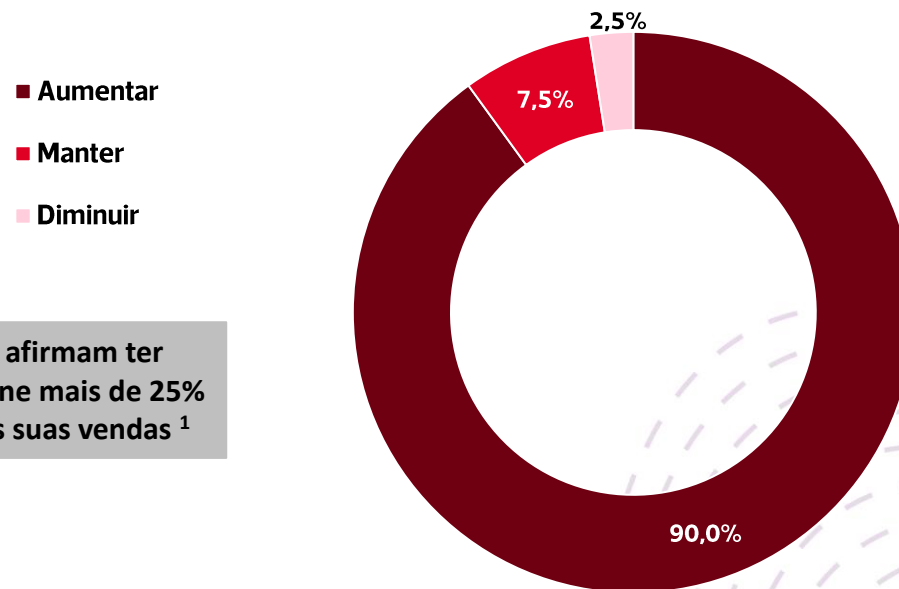
Estimativa Crescimento ano 2020

2º Insight: Maior peso do mercado doméstico



- No pós-COVID, cerca de 50% do painel estima que o peso do mercado doméstico no total das compras online aumente mais de 20%.

3º Insight: Reforço do papel dos marketplaces



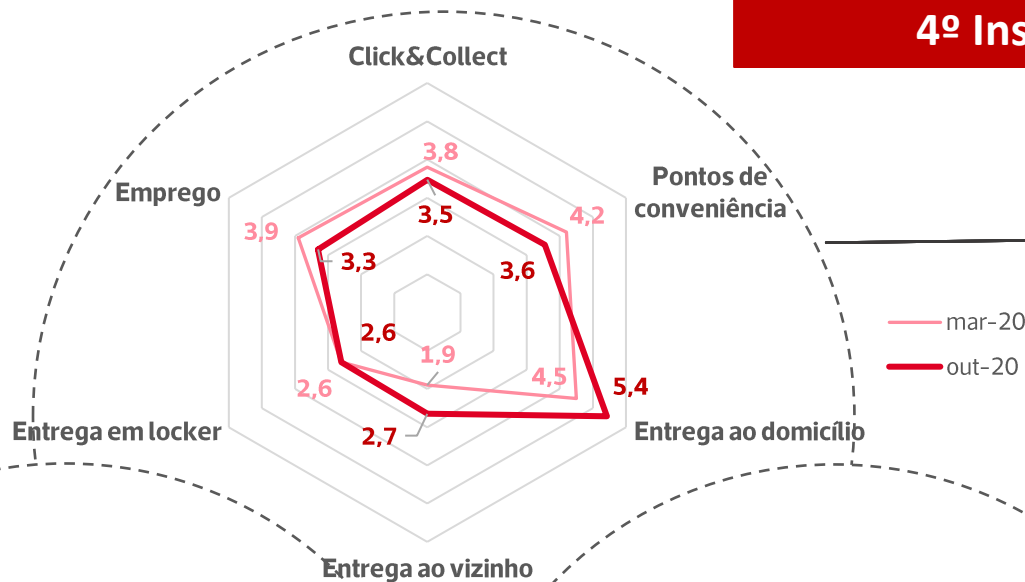
46% PME afirmam ter vendido online mais de 25% do total das suas vendas ¹

- No pós-COVID, 90% do painel aponta que a participação dos e-marketplaces no conjunto das vendas online irá aumentar.

IMPACTO COVID19. "O novo normal".

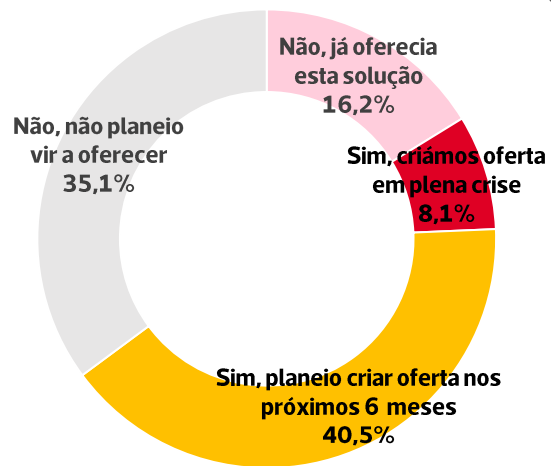


4º Insight: desafios na logística e entregas

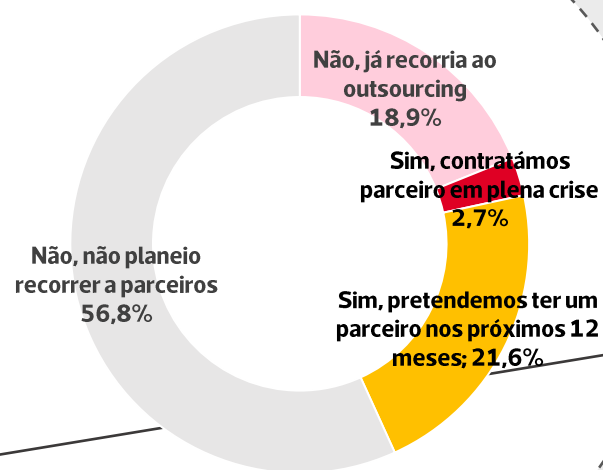


Entregas em casa.
Click&Collect + lockers vão ganhar peso pós pandemia

Outsourcing e fulfillment e mais intralogistics será uma tendência



A atual crise COVID19 teve ou terá impacto na oferta de entregas "sameday" aos seus clientes?



A crise pandémica teve ou terá impacto na contratação de um parceiro para a oferta de soluções logísticas (e-fulfillment)?

Sameday delivery veio para ficar

+ Ommichanel



+ flexibilidade no supply chain

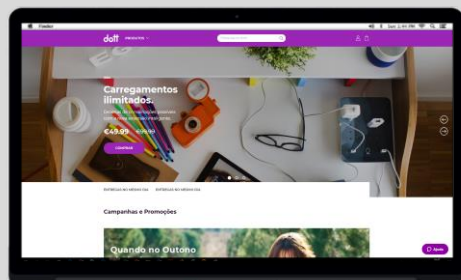
a nossa entrega é total



Iniciativas e-commerce CTT de combate ao COVID19 e de apoio desenvolvimento do comércio local, marcas e negócios nacionais



Marketplace Dott



Criação Lojas online CTT



CTT Logística



Comércio local



LOJA ONLINE - > 1000 lojas registadas **ctt**



PARCERIA UBER **ctt**



FEIRA DO CHÍCARO - ALVAÍAZERE **ctt**



FEIRA DA CASTANHA **ctt**



REFORÇO PARCERIA OLX **ctt**



Rede de >60 lockers Cacicfos 24H

a nossa entrega é total



AliExpress | ctt

Aproveite o festival de
compras **11.11**
e deixe as entregas com os CTT.



Muito obrigado !

a nossa entrega é total

Alberto Pimenta
CTT, Head of e-Commerce

11 Novembro 2020