



Euromonitor
International

Digital Disruptors: The Global Landscape for Online Marketplaces

May 2025

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Online marketplaces are the dominant model in the retail e-commerce space

Online marketplaces are a major force in global e-commerce

Marketplaces define their competitive niches and localise platforms to better compete

STATE OF PLAY

China-affiliated marketplace operators gain ground in global retail e-commerce

Discount-focused marketplaces resonate as consumers seek lower prices

Marketplaces and third-party sellers share a complex and symbiotic relationship

AI and new modes of e-commerce are improving marketplaces' customer engagement

Efficient and cost-effective logistics operations are critical to marketplace success

Marketplaces diversify their revenue streams beyond retail e-commerce

Loyalty programmes drive customer satisfaction and continued engagement

PROFILES OF MARKETPLACE DISRUPTORS

AliExpress (Alibaba Group Holding Ltd)

Allegro (Allegro Sp zoo)

Amazon (Amazon.com Inc)

eBay (eBay Inc)

Flipkart (Walmart Inc)

JD (JD.com Inc)

MercadoLibre (MercadoLibre SRL)

Naver (Naver Corp)

Noon (Noon AD Holdings Ltd)

Shein (Roadget Business Pte Ltd)

Shopee (Sea Ltd)

Temu (PDD Holdings Inc)

Douyin and TikTok Shop (ByteDance Ltd)

Tmall (Alibaba Group Holding Ltd)

Tokopedia (ByteDance Ltd)

CONCLUSION

Effectively leveraging AI is critical to marketplaces' future success

Marketplaces should focus on addressing the value-driven mindsets of consumers

Recommendations for growth

Evolution of online marketplaces

Questions we are asking

About Euromonitor's Syndicated Channels Research

About Euromonitor International

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/digital-disruptors-the-global-landscape-for-online-marketplaces/report.