



**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

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Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.

- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
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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](http://www.euromonitor.com/digital-disruptors-the-global-landscape-for-online-marketplaces/report).