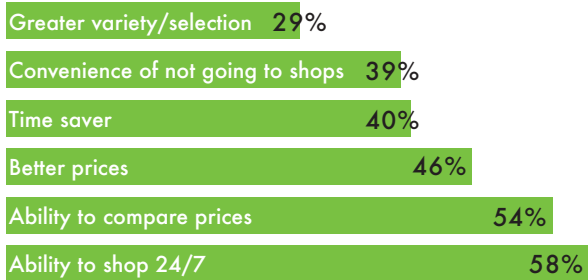




Digital Disruption in the Retail Industry

Key findings from a report being undertaken by Greenman together with Acxit Capital Partners

- Food & Drugstore segment has had one of the **highest growth rates** within the e-commerce industry (CAGR +13,4%)
- While Germany has been slow to adopt technological advancements in the retail industry there is an increasing **“openness”** to alternative retail channels.”
- Consumers use technology to make shopping faster, easier and more efficient. The **top 6 Reasons Consumers Shop Online:**



- Fashion
- Electronics & Media
- Toys, Hobby & DIY
- Furniture & Appliances
- Food & Drugstore - 2% of which is related to the German food segment

Changing Consumer Behaviour

93%

Mobile internet users as percentage of the total population

42%

EU consumers who have used Click & Collect services in the last 12 month

32%

Shoppers who made additional in-store purchases when picking up Click & Collect orders

Proptech Company Segregation & Analysis

- We sampled c.900 companies of which c.550 satisfied the data requirements of our study. The sample section’s funding amounts to c.€24bn (of which the top 5 companies have the lions share of 40%).
- EMEA sector is small but profitable with an average funding per company of under €20m.

