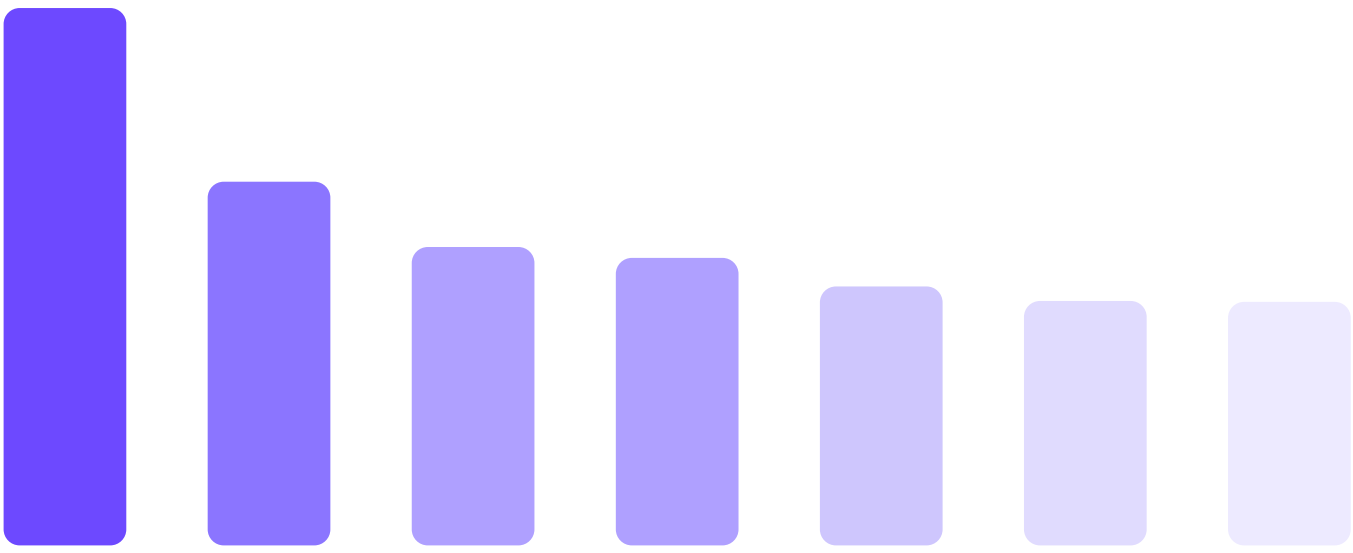
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MARKET REPORT / Q3 2026

Fulfilio E-Commerce Barometer

Quarterly E-Commerce Indexes / E-Commerce Logistics Pulse

Where do Polish shoppers buy most often, and why do they abandon their carts?



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HOW TO READ THIS REPORT

- Survey findings reflect respondents' answers.
- Expert commentary provides Fulfilio's interpretation.
- BUSINESS RECOMMENDATION

Wide Reach Only Goes So Far Where Polish Shoppers Actually Buy

The same product can end up in a cart on a local marketplace, a brand's own online store, a marketplace for consumer-to-consumer (C2C) sales, or a platform based abroad. For shoppers, these are parallel options. For sellers, each offers a different way to acquire customers, build relationships, and handle delivery. Which channels do consumers use, and which do they turn to most often?

That question is behind the launch of E-Commerce Pulse, a recurring report built around seven indexes: local marketplaces, Polish online stores, C2C and recommerce, Asian platforms, international marketplaces, social commerce, and foreign online stores. We measure each channel by its shopping reach, how often respondents name it as their primary shopping channel, where they spend the most, and where they plan to shop next quarter. The indexes track each channel's role in shopping behavior. Market share by sales value is outside their scope.

At Fulfilio, we work with online retailers and brands every day. We see where consumers buy and how sellers deliver on their shipping and returns promises. Polish online retailers, Western European brands expanding into Poland, and Asian businesses entering EU markets face different challenges. All need predictable, scalable order fulfillment. We look at shopping behavior alongside delivery and returns expectations to help businesses make better operational decisions.

E-commerce changes quickly, which makes quarterly tracking important. New regulations and customs duties affect the cost of buying from outside the European Union. Specialized marketplaces are emerging, brands are adding categories and third-party sellers to their stores, and more businesses are combining direct sales with a marketplace model. We want to see how shoppers move among channels as these changes take hold.

The first survey wave establishes a baseline. Local marketplaces lead with 68.5 points, followed by Polish brands' and retailers' online stores at 30.2 points. Active online shoppers reported using an average of 2.06 of the seven channel types. Sellers need to be able to serve customers who arrive at checkout through different channels.

The second part of the report, E-Commerce Logistics Pulse, looks at how affordable shipping, clear delivery timelines, pickup options, and return policies shape the retailer's offer. Over the previous three months, 23% of active online shoppers abandoned a purchase or switched retailers for at least one reason related to delivery or returns.

Future editions will track shifts in channel performance and shopper expectations. This first wave already points to a challenge for every seller: turning customer attention into repeatable, predictable, and profitable sales wherever shoppers place their orders.

ARKADIUSZ FILIPOWSKI
CEO Fulfilio

E-Commerce by the Numbers
8 Findings Worth Knowing

01

Local marketplaces lead Poland's e-commerce market.

Their index score is 68.5. Of active online shoppers, 80% bought through them, 63% named them as the channel they used most often, and 62% said they spent the most there..

02

Polish brands' and retailers' online stores form a clear second pillar.

Their index score is 30.2 and their reach is 46%. For 18% of active online shoppers, this was the channel where they spent the most.

03

Recommerce ranks ahead of Asian platforms.

C2C and resale of used goods score 15.8, compared with 13.4 for Asian platforms. Both channels are more prominent among younger shopper

04

Polish channels account for about four in five top shopping choices.

Local marketplaces and Polish online stores account for 79% of responses about the most-used channel and 80% of responses about where shoppers spent the most.

05

Shipping cost ranks second to product price when shoppers choose a store.

Product price was cited by 50% of active online shoppers. Low-cost or free shipping was cited by 35%.

06

Delivery and returns problems cost retailers sales.

Some 28% of shoppers abandoned a purchase or chose another retailer. For 23% of shoppers, the decision involved a reason directly related to delivery or returns.

07

The average shopper uses more than one type of channel.

Active online shoppers used an average of 2.06 of the seven channel types. The figure counts distinct types of sales channels, regardless of the number of stores or transactions.

08

Younger adults shop across a wider range of channels.

Shoppers ages 25–34 used an average of 2.55 channel types, compared with 1.72 among those 55 and older. Younger adults buy through a more varied mix of channels.

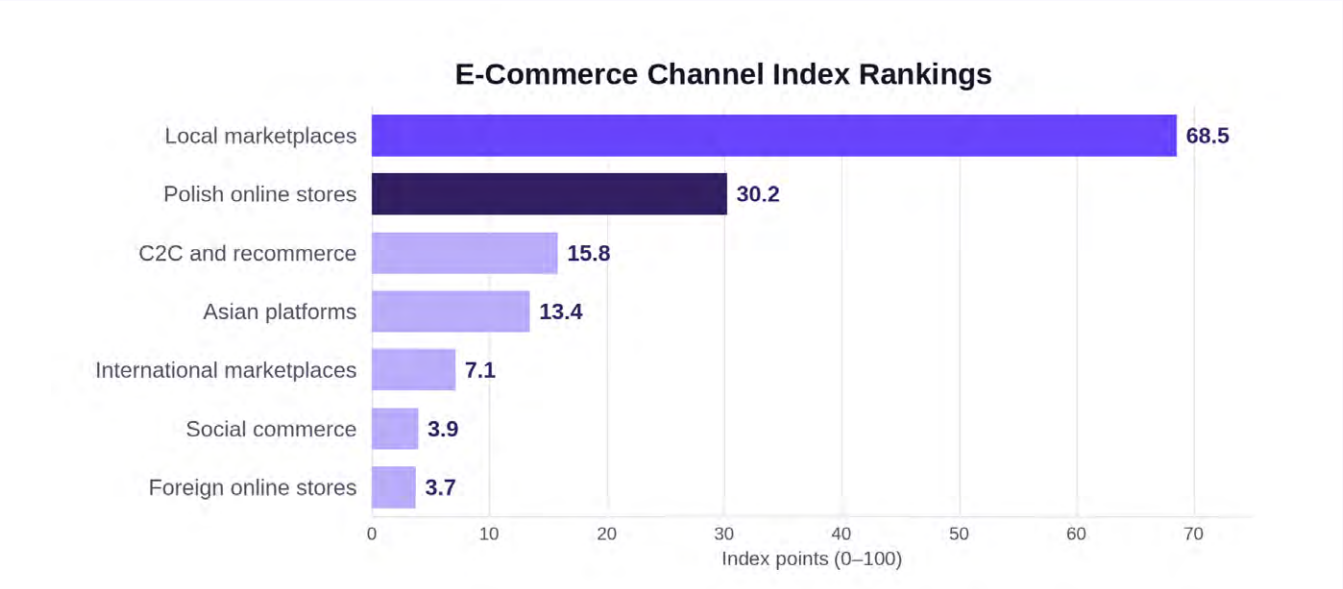
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PART I

Quarterly E-Commerce Indexes

Which channels win customers, and where do shoppers spend the most?

Local Marketplaces Leave the Competition Far Behind



SURVEY FINDINGS

Local marketplaces scored more than twice as high as the next-ranked channel. They reached the most shoppers and led on both measures of where shoppers bought most often and where they spent the most.

Online stores run by Polish brands, manufacturers, and retail chains scored **30.2** points. Even with the dominance of marketplaces, a retailer's own store remains an important customer touchpoint. C2C and recommerce came next at **15.8** points, followed by Asian platforms at **13.4**.

How to read the indexes. The ranking measures the strength of each channel across four distinct shopping behaviors. A higher score indicates a stronger position on this measure. Sales share and service quality are outside its scope.

BUSINESS RECOMMENDATION

Evaluate channel reach alongside repeat orders, margins, and fulfilment and service costs. Identify which channels contribute to business performance and which add operational complexity without a corresponding return.

How do we calculate the seven channel indexes?

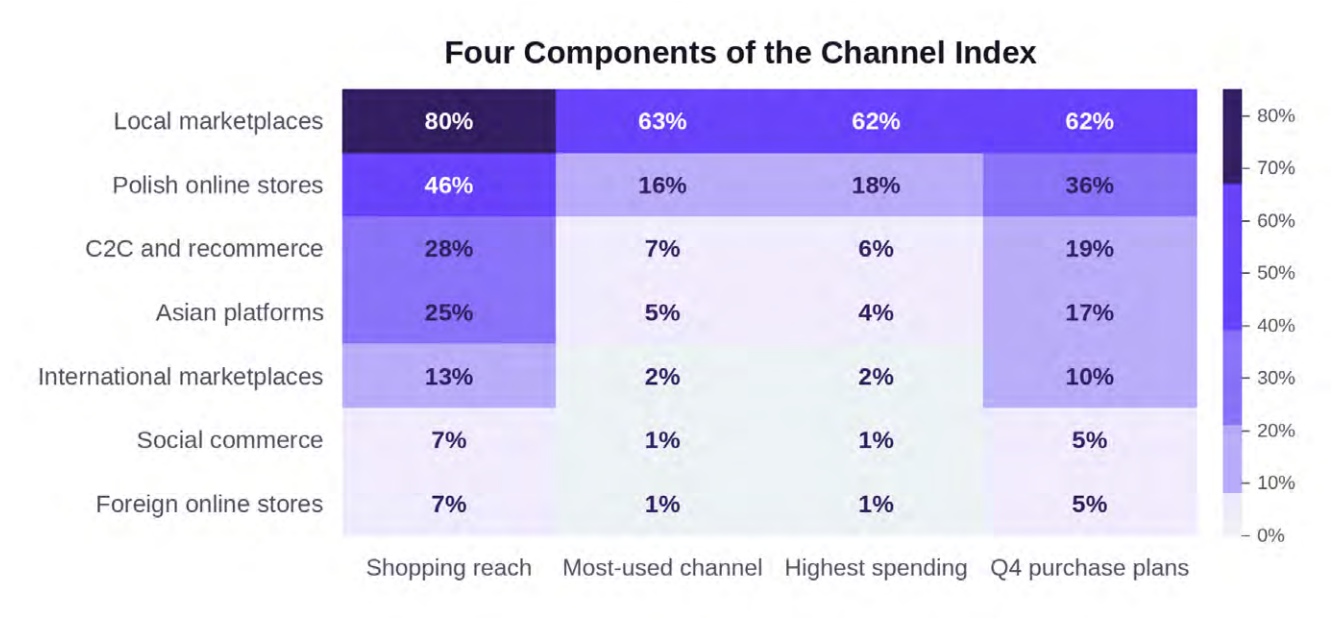
Each of the seven channels receives a separate score from 0 to 100 points.

Channel index = 35% shopping reach + 25% frequency + 25% spending + 15% purchase intent.

Shopping reach measures how many respondents bought through the channel in Q3. Frequency captures how many used it most often, spending captures how many spent the most there, and purchase intent captures how many plan to use it in Q4.

The first survey wave sets the baseline. The score does not measure market share or channel quality. Future quarterly waves will show how each channel's position changes.

Reach Attracts Shoppers. Repeat Purchases Build an Advantage



SURVEY FINDINGS

Local marketplaces reached **80%** of respondents, and **63%** used them most often. They performed almost identically on where shoppers spent the most (**62%**) and where they plan to shop in Q4 (**62%**). They were the strongest channel across all four measures.

Polish online stores reached **46%** of active online shoppers. They were the most-used channel for **16%** and the channel where **18%** spent the most. For the other channels, reach translated into a top ranking for shopping frequency or spending far less often.

Reach is only the starting point. For example, 25% of respondents bought through Asian platforms, and just 4% spent the most there. For Polish online stores, those figures were 46% and 18%, respectively. A channel can reach many shoppers and still account for little of their spending

EXPERT COMMENTARY

"Local marketplaces reach the most customers and are becoming their default place to shop. For brands, marketplaces and their own stores serve different purposes. Marketplaces bring reach, and selling directly gives brands greater control over customer relationships, data, and the shopping experience. The strongest sales models combine the two."

Remigiusz Gumowski, Director of E-Commerce, Fulfilio

BUSINESS RECOMMENDATION

As you grow marketplace sales and your own online store, create a shared inventory view, sync stock levels, and use a single workflow for picking and shipping. A unified fulfillment process reduces the risk of overselling and making errors across channels.

Marketplaces Lead. Retailers' Own Stores Still Matter



SURVEY FINDINGS

Taken together, local, international, and Asian marketplaces accounted for **69%** of responses about where shoppers bought most often and **68%** of responses about where they spent the most. Brands' and retailers' own stores accounted for **17%** and **20%**, respectively. Local marketplaces and Polish online stores together accounted for **79%** of most-used channel responses and **80%** of highest-spending channel responses.

Q4 plans follow the same order. Some **62%** plan to buy through local marketplaces, **36%** through Polish online stores, **19%** through C2C and recommerce, and 17% through Asian platforms. Q4 purchase intent is lower than Q3 reach. Shoppers make some purchases without months of advance planning, so the lower figures alone offer limited evidence of a decline.

Economic context. About 5.9 billion items entered the EU in low-value e-commerce consignments in 2025. An interim €3 customs duty per item category took effect on July 1, 2026, for imported consignments valued at up to €150. A separate handling fee was expected from November 1, 2026. Standard customs duties by product category were scheduled to apply from July 2028. These measures could make total delivery costs and warehousing within the EU more important.

Sources for economic context: European Commission, Taxation and Customs Union (June 8, 2026), Council of the EU, EU Customs Reform (September 3, 2026), and Poland's Ministry of Finance (June 29, 2026)..

EXPERT COMMENTARY

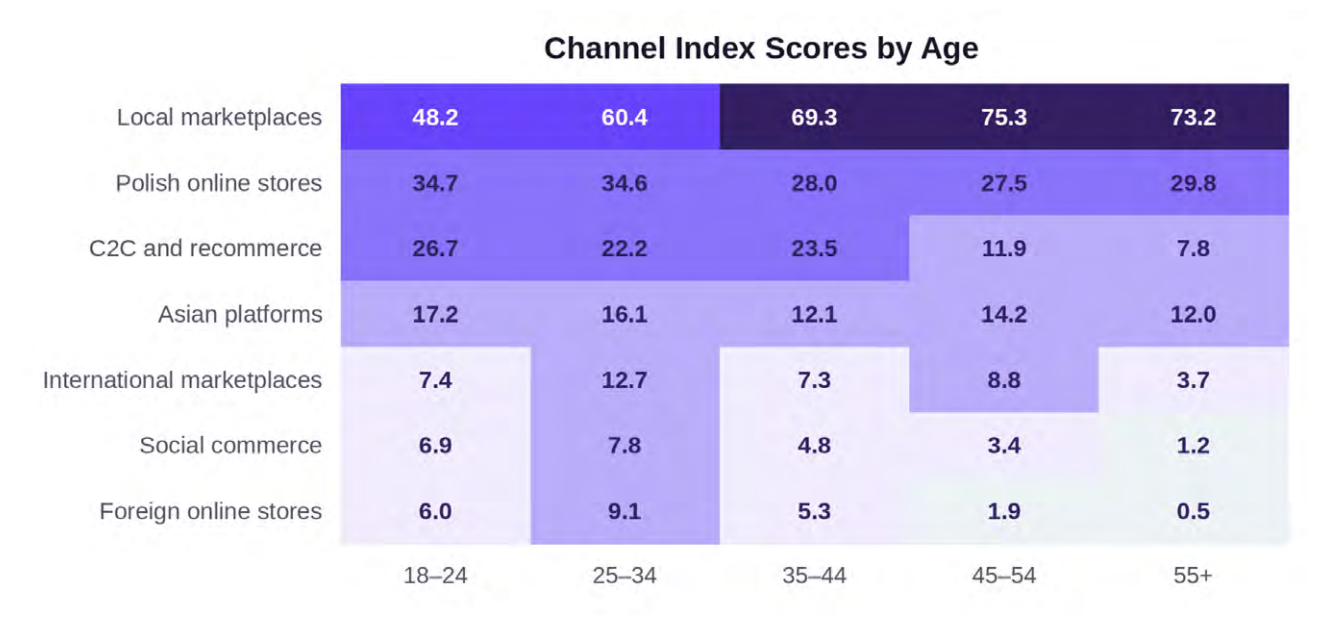
"Asian platforms scored 13.4 at a time when the terms of competition are changing. The new customs duty, the planned handling fee, and the move to standard tariffs in 2028 make total purchase cost, shipment consolidation, and local warehousing more important. Sellers outside the EU will increasingly compete on how efficiently they operate in Europe and how consistently they deliver for customers, alongside product price."

Rafał Kuczmarski, Sales Director, Fulfilio

BUSINESS RECOMMENDATION

When expanding into Poland and the EU, compare the full landed cost of each product. Test local warehousing, domestic delivery, and EU-based returns, then compare lead times, costs, and service levels with cross-border shipping.

Younger Shoppers Buy Across More Channels



SURVEY FINDINGS

Local marketplaces scored **48.2** among shoppers ages 18–24, compared with **73.2** among those 55 and older. Younger shoppers were much more likely to spread their purchases across Polish online stores, C2C, Asian platforms, and social commerce.

C2C and recommerce scored **26.7** among shoppers ages 18–24, **22.2** among those ages 25–34, and **23.5** among those ages 35–44. The score fell to **7.8** among shoppers 55 and older. International channels were strongest among shoppers ages 25–34, with international marketplaces scoring **12.7** and foreign online stores scoring **9.1**.

Asian platforms performed more evenly across age groups, from **12.0** among shoppers 55 and older to **17.2** among those ages 18–24. Scores for social commerce and foreign online stores declined more sharply with age. Younger shoppers still use major platforms, and they are more likely to shop through other channels as well.

Shoppers ages 25–34 used an average of 2.55 channel types, compared with **1.72** among those 55 and older. The share who reported abandoning a purchase or switching stores was **43%** and **17%**, respectively. The survey observed both patterns and does not establish that shopping across more channels causes more abandonment.

The more channels a customer uses, the harder it is to provide a consistent shopping experience Retailers need shared inventory data, consistent order fulfillment rules, and clear return policies for orders from every platform.

BUSINESS RECOMMENDATION

Review the customer journey on your own site and across marketplaces. Check inventory accuracy, delivery timelines, order status updates, and return policies. Set a common service standard and track where each channel falls short.

Fashion Leads, and Polish Shoppers Now Buy Almost Everything Online



SURVEY FINDINGS

Clothing, footwear, and accessories remained the most widely purchased category, at **50%** of active online shoppers. Beauty and personal care followed at 40%, then medications, supplements, and medical supplies (**34%**), and pet products (**30%**).

Online shoppers also order items that are heavier or harder to ship. About one in four bought gardening, home improvement, or construction products. One in ten bought furniture, mattresses, or large home furnishings, and **8%** bought major appliances.

Shoppers also bought multiple items. Among those who reported a specific item count, **78%** bought at least three items during the quarter and **48%** bought at least four.

A wider mix of product categories places greater demands on storage, picking, protective packaging, and returns. Apparel, electronics, and furniture can each require different procedures.

MATCHING FULFILLMENT TO THE PRODUCT

Category	Logistics challenge	Operational priorities
Fashion and footwear	Variants, sizes, and returns	Accurate picking, prompt inspection, and fast restocking of returns
Electronics	High value, fragility, and varying dimensions	Secure storage, protective packaging, damage checks, and tracking
Home and garden, furniture, appliances	Weight, size, damage, and return pickup	Carrier selection, protective packaging, delivery options, and return pickup

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PART II

E-Commerce Logistics Pulse

When do delivery terms cause shoppers to abandon a purchase?

Product Price Draws Shoppers In. Shipping Cost Can Seal the Deal

Delivery and returns are part of the buying decision. They influence where customers shop, whether they complete an order, and whether they come back.



SURVEY FINDINGS

Product price was the most frequently cited factor (**50%**). Low-cost or free shipping came next (**35%**), ahead of product availability (**24%**), trust in the seller (**21%**), and a wide selection (**20%**).

Shoppers also valued fast delivery with a clear timeline (**20%**), a choice of delivery method and location (**18%**), and straightforward return policies (**10%**). Respondents could select multiple answers, so adding these percentages would double-count some respondents.

BUSINESS RECOMMENDATION

Compare the full cost of handling an order, including storage, picking, packaging, transportation, claims, and returns, with the effect of delivery options on conversion. Review your mix of carriers and pickup points to find savings before cutting shipping charges at the expense of margin.

EXPERT COMMENTARY

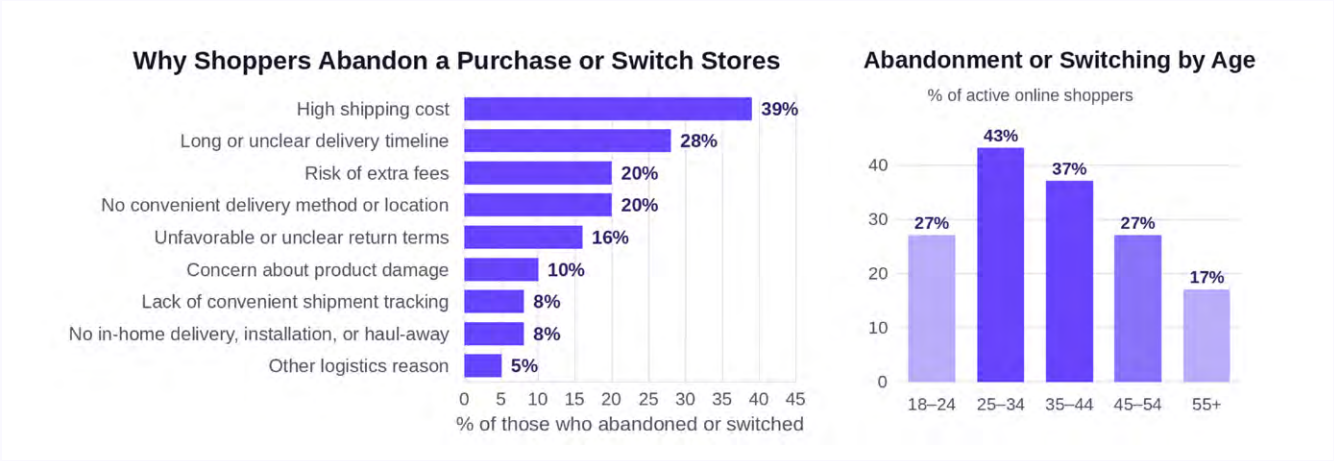
"Shipping cost directly affects conversion. Simply absorbing more of it shifts the expense to the retailer. To make affordable shipping a lasting advantage, improve the whole process: use appropriate packaging, pick orders quickly, set the right order cutoff time, choose carriers carefully, and manage return costs."

Rafał Kuczmarski, Sales Director, Fulfilio

Nearly One in Four Online Shoppers Walk Away Over Delivery or Returns

28% of active online shoppers abandoned an online purchase or switched retailers in the previous three months.

23% of active online shoppers cited at least one delivery- or returns-related reason for abandoning a purchase or switching retailers.



SURVEY FINDINGS

Among shoppers who abandoned a purchase or switched to another retailer, **39%** cited high shipping costs and **28%** cited a long or unclear delivery timeline. Some **20%** cited a lack of convenient delivery options, and **20%** cited the risk of extra fees. Unfavorable or unclear return terms were cited by **16%.**

Abandonment or switching was most common among shoppers ages 25–34 (**43%**) and 35–44 (**37%**). Among those 55 and older, the rate was **17%.** Shoppers who use more channels may compare terms more quickly and find it easier to take their purchase to another retailer..

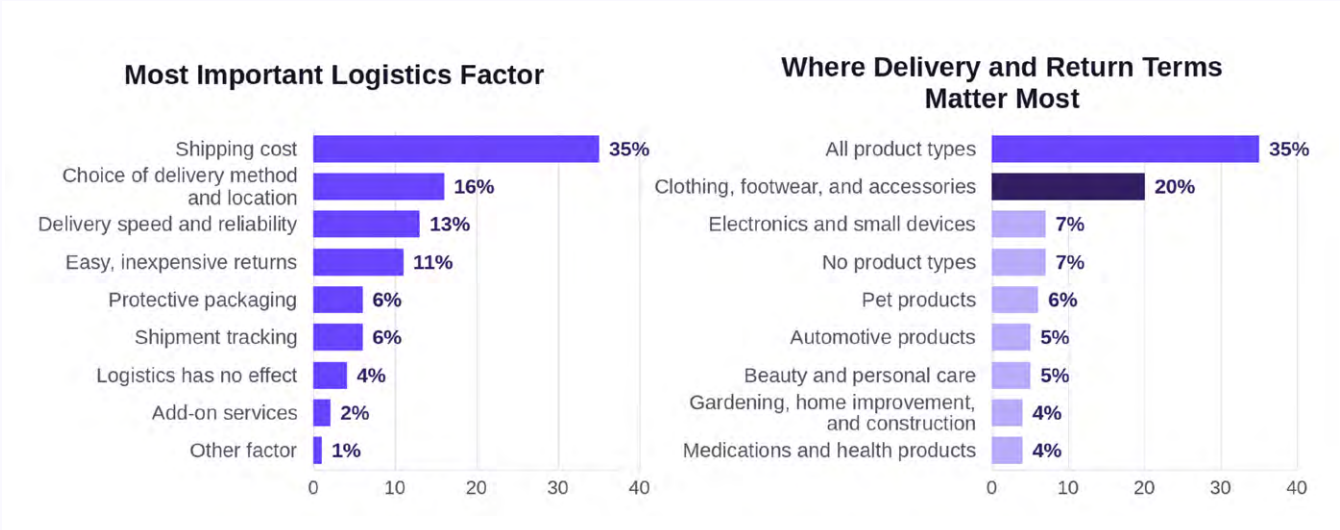
High shipping costs, unclear delivery timelines, and inconvenient delivery options can all cost retailers a sale. Each calls for a different fix, from reviewing fulfillment costs to making delivery information clearer at checkout.

HOW TO REDUCE CART ABANDONMENT

Reason for abandoning or switching*	What retailers can do
High shipping cost · **39%**	Review the full cost of order fulfillment and compare delivery options.
Long or unclear delivery timeline · **28%**	Show a realistic delivery date in the cart. Set a cutoff time and track on-time delivery.
Lack of a convenient delivery option · **20%**	Choose carriers, home delivery options, and pickup locations that match customer preferences.
Unclear return terms · **16%**	Simplify return policies and speed up refunds and return intake. Track whether customers shop with you again after a return.

* Percentages are among shoppers who abandoned a purchase or switched retailers (N = 240). Multiple responses were allowed.

Price Is One Factor. Delivery and Returns Shape Store Choice



SURVEY FINDINGS

Asked to choose the single most important logistics factor, **35%** of respondents selected shipping cost. Next came the choice of delivery method and location (16%), fast or reliable delivery (**13%**), and easy, inexpensive returns (**11%**). Only **4%** said delivery and returns had no effect on their choice of retailer.

For **35%** of respondents, delivery and return terms mattered a great deal for all product types. Among individual categories, clothing and footwear led at **20%**, followed by electronics (**7%**), pet products (**6%**), and automotive products and cosmetics (**5%** each). Furniture and large home furnishings accounted for **2%**, and major appliances for **3%**. Those figures should be read alongside the broader "all product types" response.

EXPERT COMMENTARY

"Different product categories call for different logistics. Fashion needs easy returns. Electronics need secure handling and shipment tracking. Large products can also require in-home delivery, installation, and return pickup. A simple storefront depends on operations tailored to the products it sells."

Remigiusz Gumowski, Director of E-Commerce, Fulfilio

BUSINESS RECOMMENDATION

Design fulfillment around product type and size, order volume, seasonality, and customer expectations. Set separate standards for packaging, shipping, and returns, and evaluate performance against service-level agreements (SLAs), damage counts, and total fulfillment costs.

SUMMARY

The indexes track each channel's role in shopping behavior. The logistics findings show where retailers risk losing sales. Across channels and markets, retailers need to deliver consistent service while managing costs and quality.

Methodology

The survey used computer-assisted web interviewing (CAWI) on the Ariadna panel from October 9 to 12, 2026. The nationwide sample included 1,090 adults ages 18 and older. Quotas reflected Poland's adult population by gender, age, and the size of their city, town, or village.

The report covers purchases of physical goods for delivery from July 1 through September 30, 2026, and purchase plans from October 1 through December 31, 2026. Services, reservations, and tickets were excluded.

HOW THE E-COMMERCE CHANNEL INDEXES ARE CALCULATED

Channel index = **35%** shopping reach + **25%** frequency + **25%** spending + **15%** purchase intent. Each channel can score from 0 to 100 points. The first wave establishes a baseline. The report does not yet define thresholds for low, medium, or high scores.

Component	Weight	What it measures
Shopping reach	35%	Bought through the channel in Q3
Frequency	25%	Named the channel as the one they used most often
Spending	25%	Named the channel as the one where they spent the most
Purchase intent	15%	Plan to buy through the channel in Q4

DELIVERY- AND RETURNS-RELATED ABANDONMENT

The delivery- and returns-related abandonment rate is the share of active online shoppers who abandoned a purchase or switched retailers for at least one reason related to delivery or returns. For questions that allowed multiple responses, percentages do not add up to 100%. Percentages in the text are rounded to the nearest whole number and index scores to one decimal place.

The business recommendations reflect Fulfilio's expert analysis. They describe operational steps businesses can take. The survey did not ask respondents about those steps or measure their effectiveness.

Fulfilio
Putting E-Commerce Research to Work

Fulfilio helps brands and online retailers manage logistics, from receiving and warehousing to order fulfillment, delivery, and returns. We combine operating processes and technology with solutions tailored to what each client sells and at what scale.

THREE GROUPS WE SPECIALIZE IN SERVING

Polish online retailers	Streamline operations, support multiple sales channels, and prepare for higher order volumes.
Western European brands	Manage logistics for sales in Poland and elsewhere in Europe, including large and nonstandard products.
Asian brands	Set up order fulfillment and returns in Europe in line with local market requirements.

CORE CAPABILITIES

Heavy and oversized products • Multichannel fulfillment • Inventory management and integrations • Domestic and cross-border delivery • Returns and exception handling

The report draws on consumer research and day-to-day experience running e-commerce operations. It presents the survey data, expert commentary, and recommendations separately so readers can evaluate the findings and their practical implications.

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Company information: fulfilio.com.