

Wolt Retail Report

Europe 2026

The best of your neighborhood, delivered.



FOREWORD

From restaurants to the whole neighborhood

A little over a decade ago, Wolt started with restaurants. The idea was simple: make it easier to discover great places nearby and order from them. Back then, it was difficult to imagine how much more that idea might come to include.

I've worked in retail long enough to know that customer habits rarely change overnight. Yet over the past few years, I've watched people begin to use Wolt in ways that once would have felt surprising. The same person who orders dinner might return for the weekly shop, cold medicine, dog food or flowers.

It has reminded me that people do not think in the neat categories businesses use. They simply need something and want a reliable, convenient way to get it.

Non-food retail's share of Wolt retail sales has more than tripled since early 2022. But behind that growth are retailers finding new ways to serve their customers, from independent florists and pharmacies to grocers and larger chains.

This report shares some of what we have learned so far. We are still early, and every category and market will develop differently. But I believe convenience can make local stores easier to discover, easier to return to and more useful in everyday life.

That is what excites me about where we go next.

**Panos
Karouzos**

Vice President of New Verticals, Wolt



How shopping is changing

Online shopping is mainstream across Europe, while expectations for faster delivery are rising globally.



€842 bn

spent online, up
7% in 2025



73%

of Europeans
shopped
online in 2025



32%

expect delivery under
two hours (Global
Shopper Survey 2025)



35%

want faster delivery
(Global Shopper
Survey 2025)

**That's the wider shift.
Here's what it looks like on Wolt.**



Sources: European E-commerce Report 2025;
VML, The Future Shopper 2025.



Grocery orders are becoming **full baskets**

It's the supermarket run, done from home.

48%



of Wolt grocery orders contained at least 10 items in 2025.



Non-food is taking a larger share of Wolt sales

Electronics, pet supplies and health and beauty were among Walt's fastest-growing retail categories in 2025.

3x

Non-food retail's share of Wolt sales more than tripled from 2022 to 2025.



Demand spikes around **gifting moments**

At major shopping moments in 2025, weekly non-grocery sales on Wolt were 22% to 39% higher than in the median week.

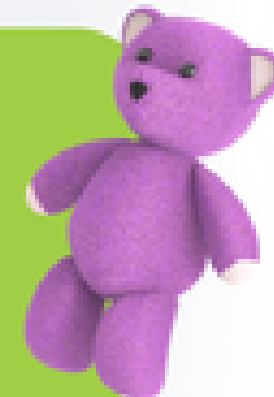
Valentine's Day



Black Friday



Christmas



International Women's Day



Wolt helps retailers reach **new and returning customers**

High-frequency shoppers
continue to buy both online
and in-store.

28%

made their first purchase
with a retailer via Wolt.



23%

returned to the same retailer
after more than three months.

Retail customers keep coming back

With the whole store in your
pocket, coming back is easy.



6 in 10

Wolt retail
customers
ordered again the
following month.



2M+

people order
retail on Wolt
every month.

The shift is happening at scale

You've seen the headlines.
This is the growth behind them.



Retail now accounts for **more than a quarter of sales through Wolt globally**

Wolt has delivered more than 230 million retail orders.

Scale is only part of the change. The more useful question is who is shopping and what they are trying to get done.

2015

2025



The customers retailers want are already on Wolt

They discover and order products online.
They will pay to get an hour back in the evening or at the weekend.

Age

71%

are aged
18–44



Employment

64%

work
full-time



Finances

57%

say they are financially
comfortable



Online shopping

50%

buy retail products
online each month



Household

41%

live with
children



It's not just **about speed**

Wolt shoppers order to skip the heavy lifting, save the trip,
and schedule their orders when it suits them.

33%

don't want to spend
time going to the store

35%

to avoid carrying heavy
items

36%

can schedule delivery

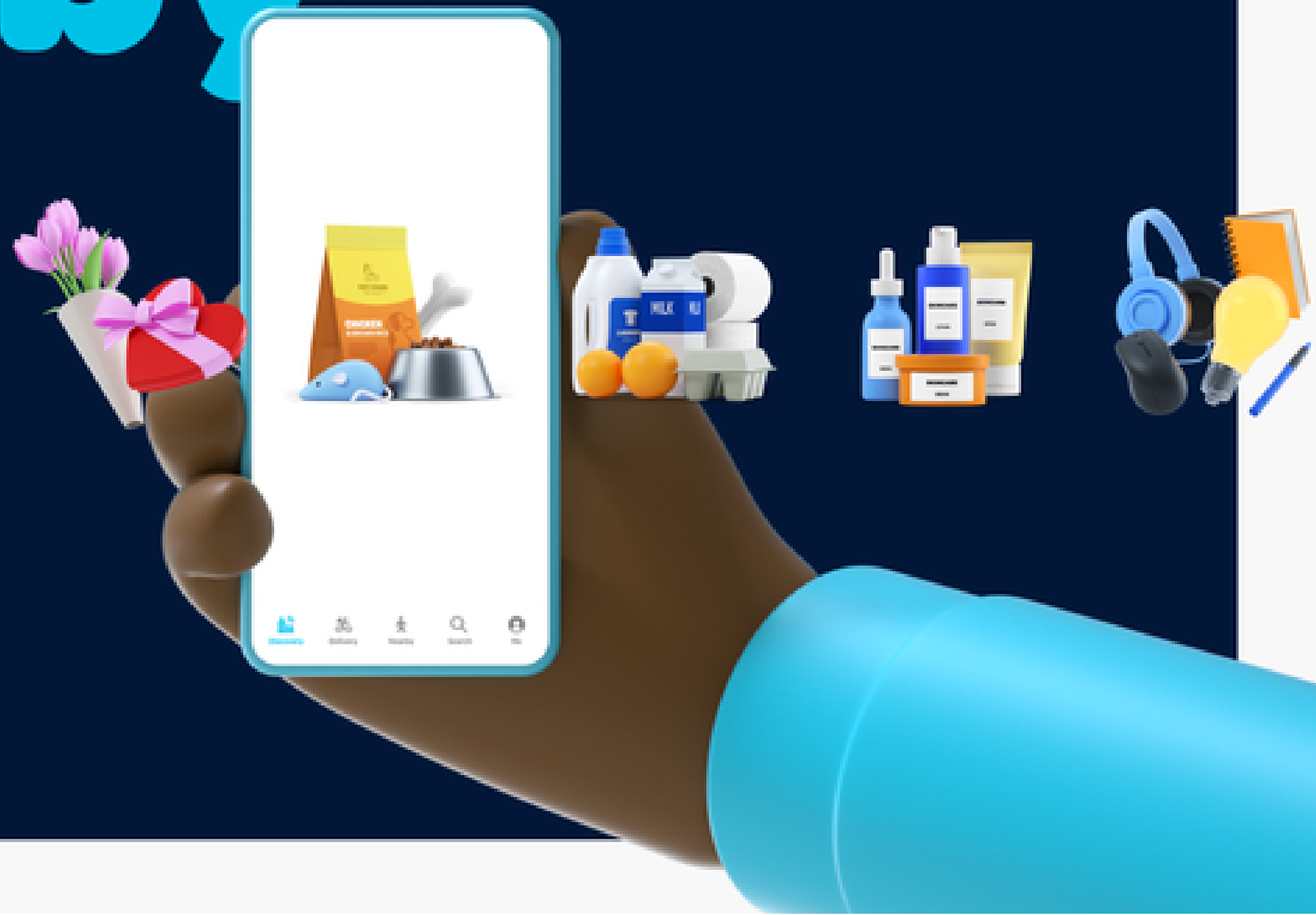
38%

need something
urgently



Aisle by aisle

Across Europe, everyday shopping is moving online. On Wolt, you can watch it happen, one product category at a time.



Inside the **online** grocery basket

Across Europe

Online grocery sales grew twice as fast as the overall grocery market in 2025: **6.8%** versus **3.4%**.

Source: McKinsey | State of Grocery Retail Europe 2026



On Wolt

Larger grocery orders are already common.

46%



The value of grocery orders placed through Wolt grew 46% in 2025.

Popular grocery categories



Bananas



Eggs



Avocados



Milk

Source: Wolt internal platform data, 2025.

When you're sick,
you can't wait

Across Europe

**Europe's e-pharmacy
market is forecast to
grow 17.9% a year
between 2023 and 2029.**

Source: Cross-Border Commerce Europe,
Ariston, Europe E-Pharmacy Market, 2024



On Wolt

**Cold and flu medicines,
delivered on demand.**

500,000

cold and flu meds delivered in 2025, peaking the last week of December

**Popular
health
categories**



Nurofen



Paracetamol



Ibuprofen



Panadol

Source: Wolt internal platform data, 2025.

The phone in your pocket is **ordering the next one**

Across Europe

Smartphones account for 40% of Europe's consumer electronics market.

Source: Cross-Border Commerce Europe, "Top 100 Consumer Electronics Retail Europe," 2025 (2nd edition).



On Wolt

Interest in the latest phones is surging.

+125 %

year-on-year growth in iPhone searches, which passed one million in 2025.

Popular electronics categories



iPhone



Headphones



Consoles



VR Goggles

Source: Wolt internal platform data, 2025.

Pet care is **repeat business**

Across Europe

Online is expected to contribute 49% to pet-care growth in Wolt countries between 2025 and 2030.

Source: Flywheel Retail Insights (2025).



On Wolt

Pet owners order regularly and return to the same store.



orders per pet owner per quarter, on average.

Popular pet-care categories



Dog food



Cat food



Treats



Sand

Source: Wolt internal platform data, 2025.

Demand on Wolt surges around moments retailers can plan for



Valentine's Day

**Florist sales reach
32x their usual
level.**



Holiday Shopping

**Toy and game sales
rise 133% during the
holiday season.**



Black Friday

**Electronics sales
rise 440% on Black
Friday.**

How retailers grow with Wolt

Data and stories from businesses across Europe.



More stores are **joining Wolt**

Local businesses account for 57% of Wolt's retail venues, with medium-sized and large chains making up the rest. In some cities, retail stores already outnumber restaurants.



+43%
year on year

40.000+

Active retail venues · Dec 2025

Hunni Concept Dog Store, Denmark



of the business now comes from delivery.



Stina Holm Rossen

"With Wolt we can offer the same convenience as a billion-dollar company, without the same resources."

© Copenhagen • Hunni • Pet boutique

4 Seasons Bio, Greece

78%



year-on-year growth through
Wolt, which now generates up to
20% of the store's sales.



Vasilis & George Souvatzoglou

*"This isn't a sprint; it's a
marathon. You grow by
caring for your customers."*

© Athens · 4 Seasons Bio · Organic grocer

Pelikan Pharmacy, Germany



of over-the-counter deliveries
run through Wolt, most ready in
about 14 minutes.



Mr Hani Ayade

*"The problem is time.
When you're sick, you
don't want to wait."*

📍 Berlin • Pelikan • Pharmacy

Kampin Kukka Florist, Finland



Mother's Day pre-orders
arrive through Wolt before
the store even opens



Jaana Myrntinen

*"Without Wolt, we wouldn't
have the resources to
manage this volume."*

📍 Helsinki • Kampin Kukka • Florist

Three patterns are linked to basket size and repeat orders



Selection

The wider the range, the bigger the basket. Stores with the broadest selection see baskets ~40% larger.

~40%

larger baskets with
broader selection



Quality

Getting every item right matters.

7 → 1

For every seven orders with an item missing, venues saw one fewer order the following month

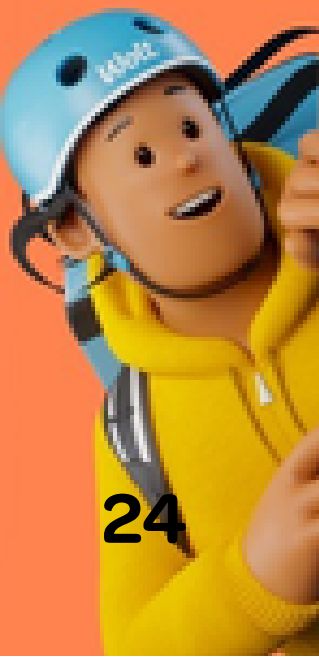


Affordability

Value grows the basket. Orders with at least one promotion are 33% larger.

33%

larger orders
with promotions



Methodology and scope

This report combines aggregated Wolt platform data with external research and selected merchant examples. Wolt figures cover 2024 and 2025 unless a longer period is stated. External statistics use the latest available industry data, principally from 2024 and 2025.

Wolt data

Wolt figures are drawn from aggregated internal platform reporting. Public source notes use “Wolt internal platform data,” not the name of the reporting tool.

The report focuses on Europe, but the market list varies by analysis. Global figures are labelled explicitly.

Unless otherwise stated, percentage changes compare like-for-like periods. Whole-number figures may be rounded; thresholds and published external statistics retain the precision needed to interpret them.

Searches, orders, units, shoppers, sales and venues are separate measures. The label beside each figure states which measure is used.

Absolute commercial figures are omitted where publication would reveal sensitive business information. Percentages, indices and thresholds are used where they communicate the pattern without disclosing total revenue.

External data

External sources were selected for recency, relevance and methodological transparency. Publication year and measurement year are stated separately where they differ.

European market sources cover different country sets. Their figures describe those source populations and should not be combined into a single Europe-wide denominator.

Forecasts are labelled as forecasts. Survey findings retain the respondent geography stated by the publisher; global survey findings are not presented as Europe-only evidence.

Merchant stories

Merchant examples combine approved business information, merchant quotations and Wolt platform data. Case studies illustrate individual experiences and are not presented as representative results for every retailer.

Interpretation and limitations

Platform behaviour reflects Wolt users and participating merchants; it is not a representative survey of all European consumers or retailers.

Associations in platform data do not establish causation. Differences may also reflect category, market, seasonality, store size, assortment, pricing and other factors.

Event uplift depends on the chosen event window and comparison period.

Sources

- European E-commerce Report 2025
- VML Future Shopper 2025
- McKinsey, State of Grocery Retail Europe 2026
- Arizton, Europe Online Pharmacy Market
- Cross-Border Commerce Europe, Top 100 Consumer Electronics Retail Europe (2nd edition) 2025
- Flywheel Retail Insights 2025
- Wolt platform data through December 2025
- Wolt Brand Tracker, July 2025–February 2026
- Wolt customer survey, March 2025; n=323



Definitions

Retail – Wolt categories outside restaurant delivery, including grocery and non-food retail.

Grocery – Supermarkets and other stores primarily selling food and household staples.

Non-food retail – Retail categories excluding grocery-related retail and restaurants.

Active retail venue – A retail venue active on Wolt in the stated month.

Monthly retail shopper – A unique customer placing at least one retail order in the calendar month.

Orders per shopper – Retail orders in a month divided by monthly retail shoppers.

Month-over-month retention – The share of customers active in one month who placed another retail order in the following month.

First-time customer – A customer with no previous order from the named retailer before the measurement period.

Lapsed customer – A customer whose previous purchase from the retailer was more than three months earlier.

High-frequency shopper – A shopper classified as high-frequency in the underlying 2025 customer analysis.

Event uplift – Change during a named occasion compared with a defined reference period.

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