

EchoTik

T i k T o k 选 品 工 具

TikTok Shop 2025 German Marketplace Performance Report

TikTok Shop Market Report: German (202502-202505)



www.echotik.ai

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Data Analysis Period: Feb 2025 - May 2025



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Background of the Study

Background | Market | Data Specs



CHAPTER ONE

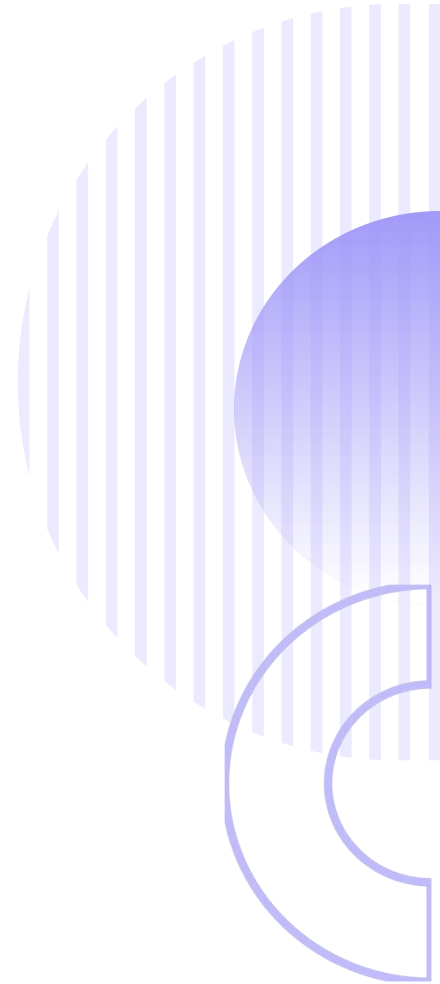
INTRODUCTION

Amidst the ongoing transformation of global consumer behavior by social commerce, TikTok has emerged as a pivotal platform for brand discovery and conversion. Its unique "Discovery-Based Shopping" model unlocks unprecedented growth potential for cross-border e-commerce.

Since its 2021 debut in Indonesia, TikTok Shop has maintained rapid global expansion. Following its successful entry into Spain, TikTok Shop officially opened to cross-border sellers in three core European markets—Germany, Germany, and Italy—in late March 2025. This strategic move not only advances TikTok's global commerce ambitions but also establishes a direct gateway for Chinese sellers to reach Europe's high-spending, sophisticated consumers, accelerating EU market penetration.

First-mover advantage demands data-driven insights. To empower sellers in these new markets, EchoTik has launched dedicated analytics portals for all three countries, alongside its comprehensive "TikTok Shop Germany Market Deep Dive Report." Leveraging real-time platform data and market research, this report delivers actionable insights acrossMarket potential
Demographic analysis; Consumer trends;
Competitive landscape

Equipping businesses with precision strategies for product selection, marketing, and operations.



NOTICES

Data Notice

1. Statistical Period: February 2025 – May 2025

2. Research Scope:

TikTok Shop German short video/live commerce metrics, growth trends, and related content.

3. Data Source:

Data Source: Non-exhaustive, anonymized data from EchoTik (third-party TikTok analytics platform).

4. Disclaimer:

Disclaimer: Findings are reference only due to inherent data limitations.

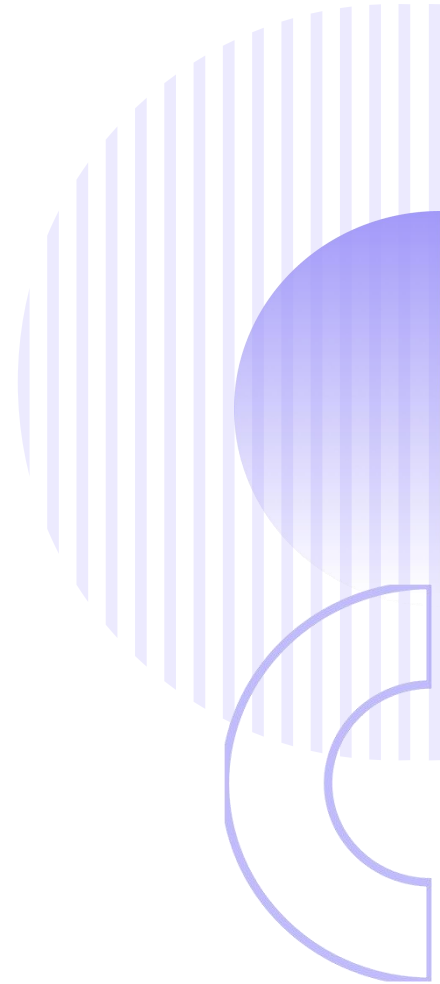
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Market Overview

Macro-level Marke/E-commerce Landscape



CHAPTER TWO

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German Market - E-commerce Development

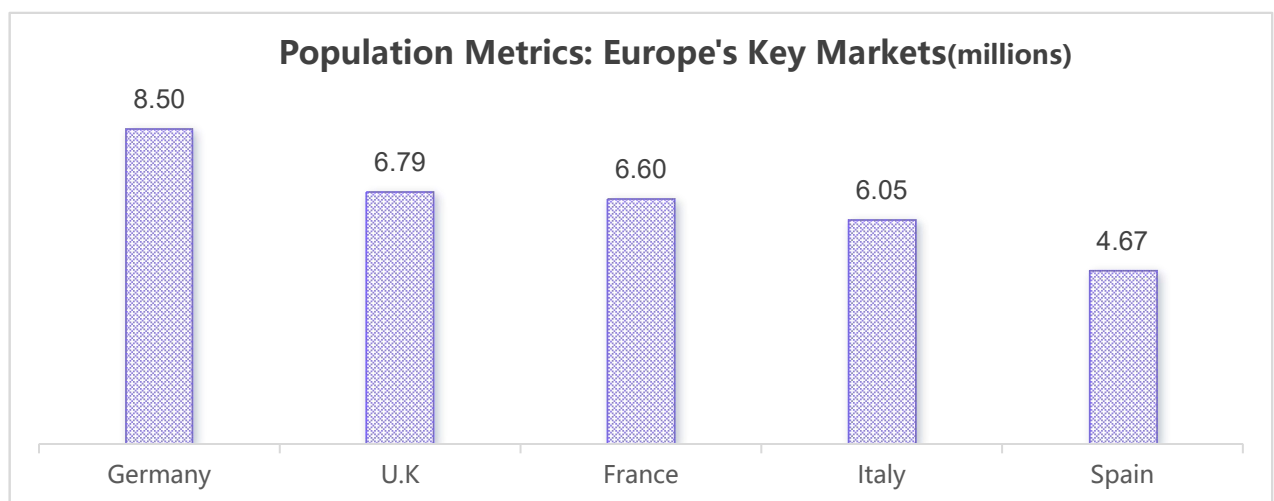
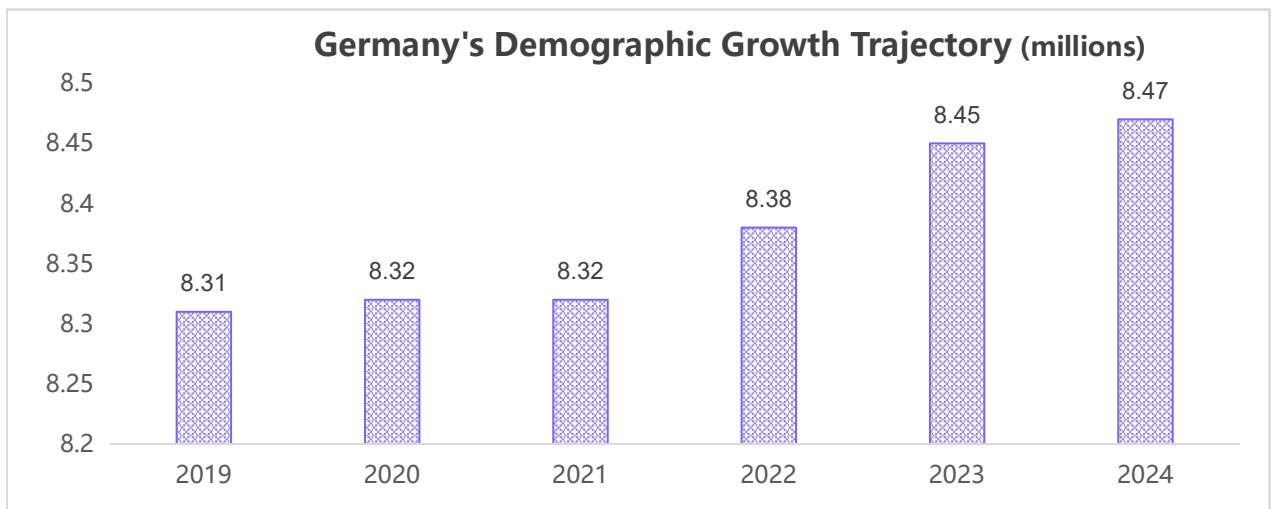
EU's Largest Economy & Most Populous Market

➤ Germany's Economic

Germany, as Europe's largest economy, possesses a robust economic foundation. According to the latest 2024 statistics, its nominal GDP reached €4.3064 trillion with 2.9% year-on-year growth. GDP per capita rose to €50,836, ranking fourth globally, while household disposable income per capita stood at €29,668 – equivalent to 58.4% of GDP per capita. With the world's third-strongest consumer spending power, these fundamentals provide solid support for consumption sectors, including e-commerce

➤ Germany's Demographic Profile

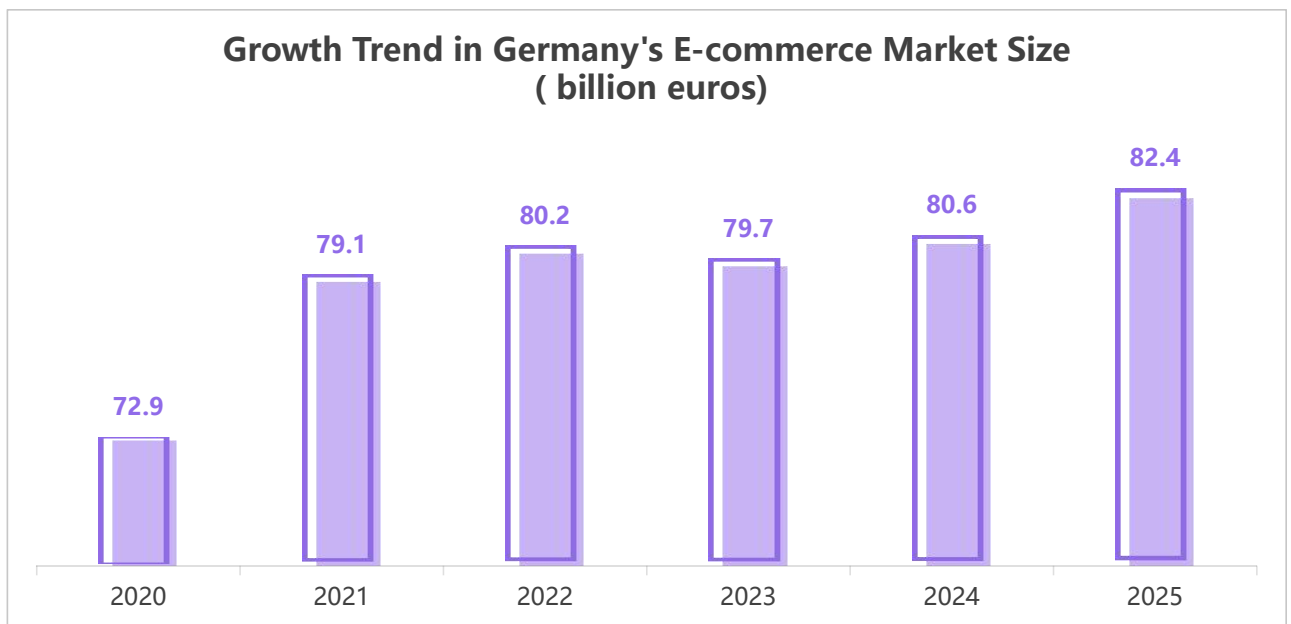
- ✓ Germany's population has consistently ranged between 66-68 million over the past five years, making it the EU's most populous nation (including overseas territories), with household internet penetration exceeding 96%.
- ✓ Regarding population structure, Germany's age distribution comprises 0-14 years (13.99%), 15-64 years (63.26%), and 65+ years (22.75%) – indicating emerging opportunities in silver economy commerce.



German Market - E-commerce Development

Europe's No.2 E-commerce Market – Solid & Accelerating

- ✓ Germany, Europe's second-largest e-commerce market (after UK), contributes 18.3% of EU GMV. Its stable ecosystem makes it a prime target for platform expansion;
- ✓ Traffic oligopoly prevails: Amazon commands 38% of German e-commerce traffic. GMV concentration remains high, with TikTok Shop nearing Zalando's traffic. Top 3 platforms (Amazon, Otto, Zalando) drive 60% of national GMV, while price-sensitive consumers propelled Temu's GMV growth by 400% last quarter.



Platform	Avg. Monthly Visits (M)	Annual GMV (€B)	Platform Type	Core Consumer Profile
Amazon	211	42	General Merchandise	Aged 25–54, family-focused (52% Prime members)
Otto	48	9.2	Department Store	Middle-class women 35–60, home category decision-makers
Zalando	36.5	7.8	Vertical Fashion	Fashion-forward youth 16–35, high repurchase rate
Kaufland	31	6.8	O2O Hypermarket	Household managers 40+, strong local demand
MediaMarkt	28	5.7	Vertical Electronics	Tech enthusiasts 18–45
Shein	58	38	Fast Fashion	Price-sensitive shoppers 18–30 (students/new professionals)
Temu	44	38	Value General Merchandise	higher penetration in lower-tier cities
TikTok Shop	27	8.5	Social Commerce	Gen Z (16–28), impulse-driven buyers

German Market-E-commerce Consumer Insights

Germany's E-commerce Expansion: Surging Gen Z & Silver Consumers

- German's 2024 e-commerce penetration reached 68.2 million users (81% of population), with sustained growth primarily driven by silver consumers (65+).
- Consumer segments show distinct patterns: Core 25-40 users (34+%) dominate family/parenting spending, while Gen Z (16-24) leads purchase frequency in beauty/fast fashion. The 41-60 cohort drives premium automotive/home appliance purchases, with silver consumers showing fastest adoption growth plus strong health product loyalty and repurchase.

German Online Shoppers



6.82 M

81% of the National Population

Average Order Value



89\$

Higher AOV than European Peers

Weekly Online Shoppers



39%

99% of Germans Buy Online

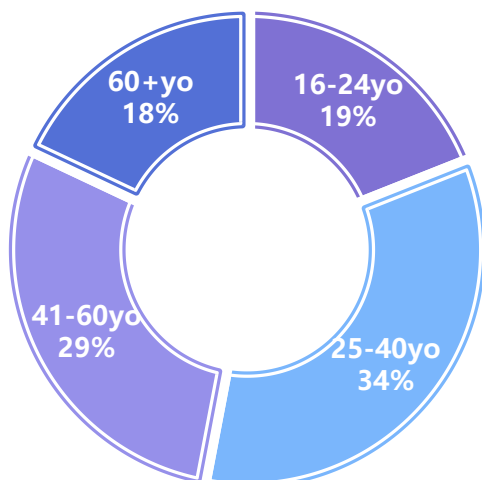
24h Delivery Guarantee



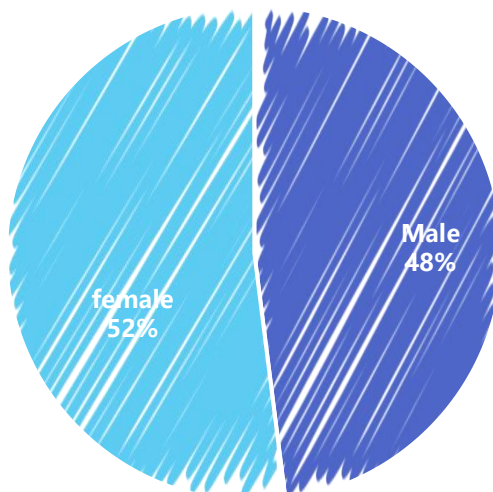
95%

Nationwide Delivery Network

Consumer Age Distribution



Consumer Age Distribution





Tiktok Shop Metrics

**Monthly New Stores | Featured Shop Rankings
| Ranking Analysis | Best-Selling Products**



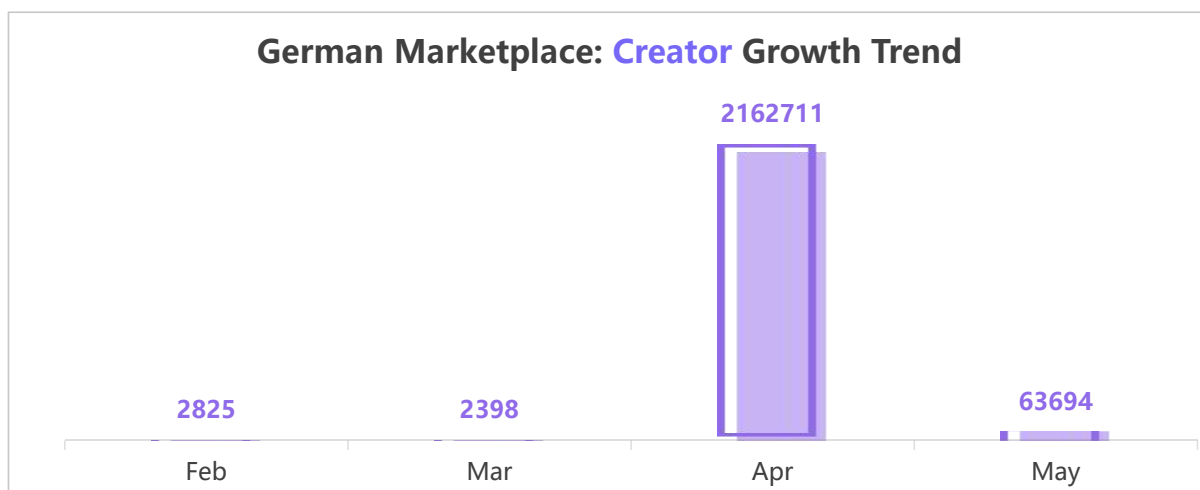
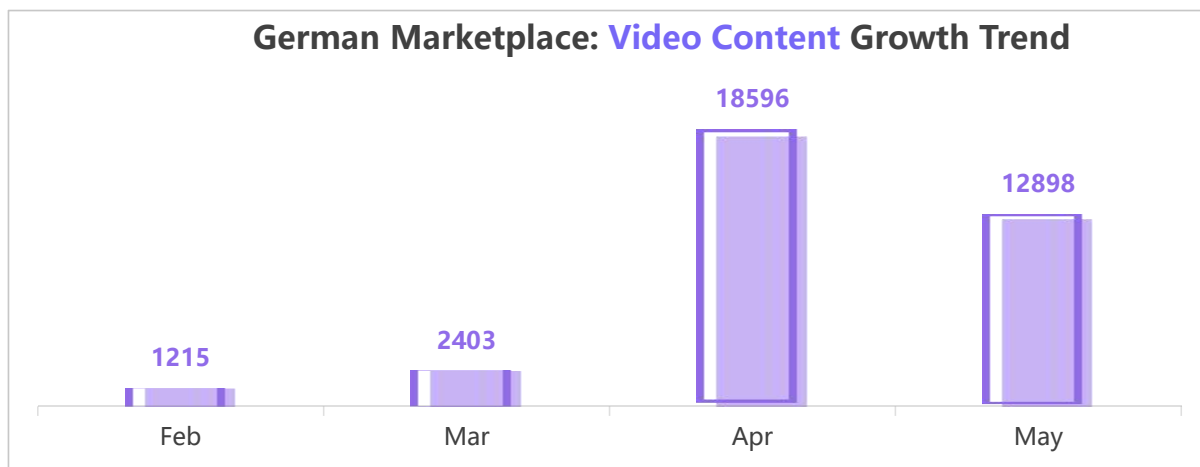
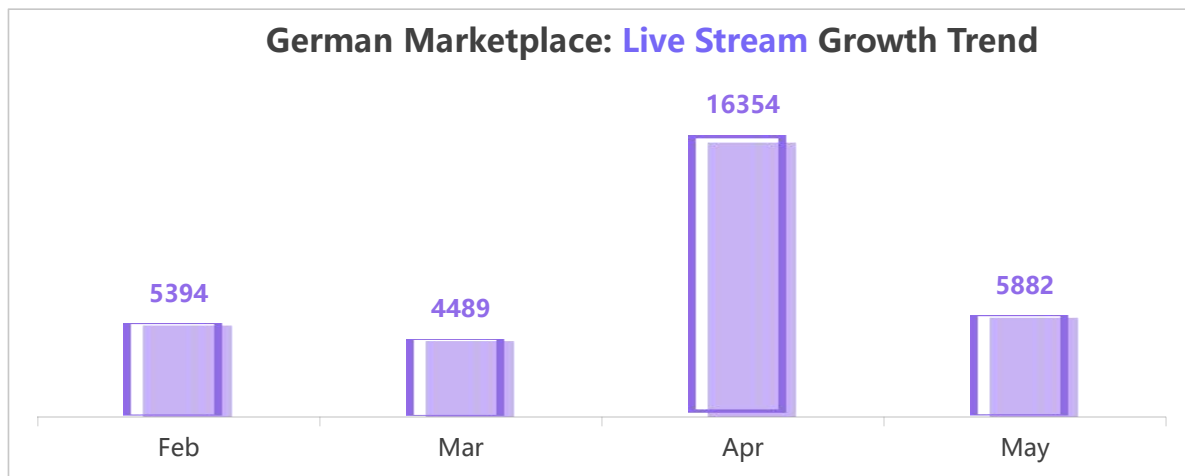
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German Market-TikTok Shop

Post-Launch Surge: Multiplied Growth in Creators & Livestreams

Since its March launch, German shops have grown by nearly 1,000 monthly, with creator-led accounts surging nearly 1,000-fold. High consumer acceptance and thriving digital engagement are fueling exponential growth in live-streaming and short videos. This content-commerce integration will drive sustained boom in Germany's cross-border e-commerce ecosystem.



German Market-TikTok Shop

Germany Marketplace: Fastest-Growing New Launch with #1 Store GMV Cracking \$500K

- ✓ Since launch, Germany's marketplace has grown rapidly without clear tiers, yet emerging stores show explosive momentum. As of May, the TOP 6 stores cleared \$100K GMV, while ranks #7-10 (\$38K-\$80K) cluster closely with upside potential.
- ✓ 70%+ stores operate with <50 SKUs—some even single-digit—leveraging hit-focused assortments. This "quality over quantity" approach dominates, with niche players winning via hero products.
- ✓ 60% of stores maintain >\$30 ASP, contrasting sharply with TOP 10's volume-driven sub-\$20 models. This polarization highlights dual paths to market leadership

Top 10 Stores in All Categories - German (May 2025)

Store Name	Sales Amount (\$K)	Sales Volume (K units)	Number of Products	Average Price (\$)
Isq24	15	536	114	87.2
Hanadis Marken Welt	10	337	73	52.8
Melcam	10	202	5	44.6
PlantDEA	5	110	15	24.8
Oildem	2	106	3	59.2
MAGIC JOHN EU SHOP	6	80	8	17.3
MARS&VENUS EU	1	40	67	31.5
svenja.walberg	2	39	26	34.4
Crispy Cousins	2	38	7	19.0
Candy Peak	114	38	38	5.3

German Marketplace-Top-Performing Shop

#1 German Marketplace Seller: General Store

Tops Chart with Diverse Assortment & Hit Products

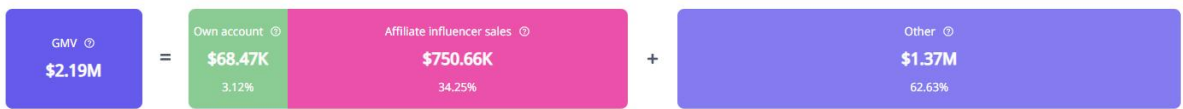


TOP1: Isq24

ISQ24 is a supply-chain-based local store in the beauty & personal care category, operating its own TikTok account. It primarily meets customer demand through new arrivals of perfumes, bags, and fashion accessories. With product prices ranging from \$5.77 to \$520.46 (avg. \$80.65), the store offers 160 SKUs across diverse core categories

Sales Performance

Sales channels



Creator	Followers	Likes	Product Category	Sales	GMV	Related Videos
melysa037	128.7K	3.6M	Beauty & Personal Care	5.9K	\$194.12K	
Isq24.de	87.7K	338.7K	Beauty & Personal Care	1.8K	\$68.47K	
olga.s.787	62.5K	704.6K	Beauty & Personal Care	1.4K	\$32.52K	
celinaslife_offiziell	1.8M	49.4M	Beauty & Personal Care	1.2K	\$47.57K	

Echotik forecasts indicate 63% of store sales come from direct purchases, 34% from KOL collaborations, and 3% from its owned account. Partnering mainly with mid-tier influencers, beauty KOL melysa037 (129K followers) has generated up to \$190K GMV via viral videos, even with the store's recent launch.

Top-Selling Products



Lattafa Khamrah
 Price: \$34.63
 Sales: 14.2K
 Influencers: 361



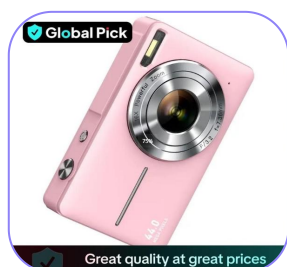
Shaghaf Oud Ahmar
 Price: \$57.82
 Sales: 4.8K
 Influencers: 127



Lattafa Eclaire
 Price: \$34.69
 Sales: 6.7K
 Influencers: 142

German Marketplace-Top-Performing Products

Top 5 Best-Performing Items (May 2025)



Kids Digital Camera

Shops: Melcam
Price: \$19.21
Sales: 18.3K
GMV: \$283.13K
Influencers: 35
Videos: 55



Lattafa Perfume Eclaire

Shops: Hanadis Marken
Welt
Price: \$32.89
Sales: 10.3K
GMV: \$256K
Influencers: 47
Videos: 72



Bio Moringa Capsules

Shops: PlantDEA
Price: \$20.83
Sales: 9.3k
GMV: \$173.92K
Influencers: 17
Videos: 26



Lattafa Khamrah

Shops: Isq24
Price: \$32.89
Sales: 6.6K
GMV: \$173K
Influencers: 60
Videos: 77



Black Cumin Oil

Shops: Oildem
Price: \$54.37
Sales: 3.6K
GMV: \$171.21K
Influencers: 62
Videos: 84

TikTok Shop Germany: Trend Forecast

Emerging as a global social commerce disruptor, TikTok Shop is accelerating worldwide expansion post-initial traction. Germany—Europe's economic powerhouse—presents exceptional potential: 42M+ active users (a quarter of its EU total) with 85-minute daily usage, cementing prime conversion potential. 2025 Q3-Q4 marks a pivotal wave for domestic brand onboarding, triggering projected double-digit GMV acceleration. Local heritage labels migrating en masse will reshape category dynamics beyond current cross-border dominance.

01

Market Continues Expansion: High AOV & Livestreaming Drive Instant User Conversion

① **High AOV & Livestreaming Momentum:** TikTok users in Germany show high daily engagement. German AOV (€15-18 / ~\$17-20) exceeds Southern Europe's. Brand self-streaming dominates at 98% of broadcasts. Initial operations will likely replicate Italy's model. Local brands and cross-border sellers will seize early traffic, with first-year GMV possibly >€500M.

② **User-Driven Instant Conversion:** German consumers prefer professional reviews (e.g., unboxings, ingredient analysis), distinct from entertainment-focused marketing. Beauty and 3C accessories, due to strong visual appeal, are projected as the first breakout growth categories.

02

Category Forecast: Sustainable Home, Wellness Essentials & Accessible Luxury Lead

Category	Growth Drivers	Key Products
Eco-Home	Strong German eco-consciousness; surging demand for biodegradable materials; 67% willing to pay 30% premium	Solar-powered backpacks
Functional Health Supplements	High conversion from tech review content; Aging population driving NAD+ demand	NAD+ supplements, Portable health monitors
Affordable Luxury Accessories	Livestream authenticity verification builds trust; Data-driven product development via reviews	Convertible necklaces, Eco-metal hypoallergenic earrings

03

High-Barrier, High-Reward Market Demands Hyper-Localization & Compliance

① **Localized Content Engine:** Deploy N. & S. German dialect hosts; region-specific scenario videos; TÜV-certified live inspections (per-stream badge). Mid-tier KOLs (50K-500K followers) drive vertical authority—e.g., *Jack Wolfskin's 120% sales surge via hiking-tag targeting*.

② **Compliance-Logistics Synergy:** Navigate 19% VAT via OSS integration; pre-load EPR/CE certifications to prevent delays. Leverage "One Store, Five Markets" policy to slash cross-border ops costs.



Voice of the industry of 2025

**Insights and Outlook from TikTok Shop
Practitioners**



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CHAPTER FOUR

Insights from TikTok Shop Sellers

As a billion-dollar seller of large furniture, 70% of our orders come from Amazon. Starting in 2024, we began exploring TikTok U.S. and platforms like Temu, initially focusing on lower-priced entry-level products. Compared to other platforms, we can clearly see TikTok's rapid growth. We are optimistic about influencer-driven sales and will invest more manpower and resources into TikTok in the future.

— Mr. Deng, Guangdong-based Furniture Seller

In 2025, high-quality content, long-term brand power, and the (horizontal and vertical expansion of ADS will be the right path for going global. Products should be integrated with multi-channel traffic and brand concepts, which will be crucial for achieving long-term growth and breakthroughs.

— 原力•出海(深圳)-Force Awakens

原力•蔚航-Force Azure Co-founder 小超超-Lazarus & Liz

For many years, we have focused on cross-border e-commerce logistics between China and the U.S. Over the past eight years, our team has served over 100,000 small and medium-sized cross-border sellers, becoming a leading enterprise among Chinese-Americans in the流行 (popular) goods sector. We also have unique insights into Chinese brands going global to Europe and the U.S. The multiple TikTok stores we operate have consistently ranked first in various categories for several months. Our highest-performing store has successfully collaborated with over 10,000 influencers, and a single video on the platform has reached a maximum of 18 million views.

— BESTME GROUP CEO Mark Xie