

# The Real Value Of Digital Commerce

## Total Digital Contribution

Released May 2026

POWERED BY  
**SEEC**™

BENCHMARKING → INSIGHTS → ACTIONS



**WE EMPOWER THE MOST IMPACTFUL  
INVESTMENT DECISIONS  
IN DIGITAL COMMERCE**

**- BY REMOVING GUESSWORK**

**Community** >150 Global Brand Manufacturers > 5m Data Points >50 Markets



**DCG is the only global source of trusted, independent Digital Commerce capability intelligence**

Enabling the best-informed Digital Commerce capability decisions, unlocking digital and digitally-influenced growth for global brand manufacturers



# Digital Commerce is no longer a channel. It is the *commercial growth engine* of retail.

DCG analysed **>\$1.5 trillion** in 2025 brand revenues.  
Across categories, **40 - 90%** of revenue is digitally connected -  
transacted online or influenced by digital touchpoints.

## The Gap:

Brands scoring **14% above average** in DCG's **SEEC™** benchmark  
generate **+8.2% additional growth \***.

## The Risk:

For a **\$10bn brand**:

70% digitally connected  
= **\$7bn exposed to Digital  
Commerce capabilities**

An 8% growth delta  
= **\$560m at stake**



**Capability strength increasingly determines performance.**

\* SEEC score of 289 v average 249

\$41m in incremental growth for every \$500m in digital commerce revenue

# Methodology & Sources

## Digital Contribution estimates reflect:

- ❑ Reported consumer eCommerce penetration
- ❑ Consumer digitally-influenced retail sales, based on a range of industry sources
- ❑ Category dynamics such as multi-category manufacturers (e.g. Nestlé, Mars) and higher digital influence categories (e.g. Consumer Electronics)
- ❑ Geographic weighting of revenue mix, including US-heavy portfolios and high digital influence markets such as China

**Digital B2B contribution** (e.g. foodservice portals, distributor ordering systems, institutional procurement platforms) is included where known, but not fully captured across all manufacturers due to limited or inconsistent disclosure.

**2025 revenues** reflect latest available results and/or consensus estimates.

**Digital influence estimates** are conservatively adjusted (-5/10pts) to account for potential overstatement in industry-reported figures.

## The Digital Contribution: *Sources*



Deloitte.



McKinsey & Company

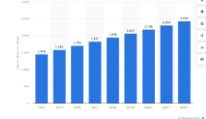
US consumer sentiment and behaviors during the coronavirus crisis

December 14, 2020 | Article

FORRESTER

US Digital-Influenced Retail Sales Will Top \$3.8 Trillion In 2027

statista



Profitero

The Digitally Influenced Shopper

Defining the true cost of underinvesting in the digital shelf



investp



publitas

The New Front Door to Your Customer's Shopping Experience – Digitally-Influenced Sales and the Future of Retail



# The Digital Contribution: Food & Beverages



Revenues (2025)	\$103bn	\$92bn	\$47.5bn	\$47bn <i>Includes Kellanova</i>	\$36.5bn	\$32.1bn	\$26bn
EBIT/ Operating Margin	17%	14.75%	28%	20%	16.5%	13.4%	18.5%
Online %	20.5% *	11%	9% *	18%	11%	13.5%	13%
Online \$ (directly attributed)	\$21.1bn	\$10bn	\$4.25bn	\$8.46bn	\$4bn	\$4.3bn	\$3.4bn
Total offline sales	\$82bn	\$82bn	\$43.2bn	\$38.5bn	\$32.5bn	\$27.8bn	\$22.6bn
Digital Influence %	39%	32%	31%	40%	32%	32%	42%
Offline digitally influenced-sales	\$31.9bn	\$26.2bn	\$13.4bn	\$15.4bn	\$10.4bn	\$8.9bn	\$9.5bn
Digital Contribution	\$53bn	\$36.3bn	\$17.7bn	\$24bn	\$14.4bn	\$13.2bn	\$12.9bn
% Digital Contribution	51.5%	39.5%	37%	51%	39.5%	41%	49.5%

\* Includes eb2b

Nestlé does include eb2b revenues under the reported eCommerce/online penetration numbers.

\* Excludes eb2b

Coca-Cola's higher margin reflects asset-light concentrate business model

– estimated at between 35% and 80% of total business in certain markets

# The Digital Contribution: Essential Health & Personal Care Leaders



\* Kimberly-Clark










Revenues (2025)	\$84.3bn	\$58bn	\$20.4bn	\$20bn	\$19.3bn	\$15bn	\$6.5bn***
EBIT/ Operating Margin	24.3%	20%	21.2%	18%	24.5%	21%	20%
Online %	19%	16%	17%	24%	25%	25%	22%
Online \$ (directly attributed)	\$16bn	\$9.3bn	\$3.5bn	\$4.8bn	\$4.8bn	\$3.7bn	\$1.4bn
Total offline sales	\$68bn	\$48.7bn	\$17bn	\$15.2bn	\$14.5bn	\$11.2bn	\$5bn
Digital Influence % *	48%	43%	45%	45%	44%	46%	36%
Offline digitally influenced-sales	\$32.8bn	\$21bn	\$7.6bn	\$6.8bn	\$6.4bn	\$5.2bn	\$1.8bn
Digital Contribution	\$48.8bn	\$30bn	\$11bn	\$11.6bn	\$11.2bn	\$8.9bn	\$3.3bn
% Digital Contribution	58%	52%	54.4%	58%	58%	59.5%	50%

\* Digital influence assumptions are applied at a sub-category level, reflecting structural differences between prestige beauty, mass personal care, oral care and diversified CPG portfolios.

\*\* Diversified categories and pre-separation of the Ice Cream business) \*\*\*Includes pharma and crop science divisions

# The Digital Contribution: Specialist Hygiene, Home & OTC Leaders

							
Revenues (2025)	\$24.9bn	\$15bn	\$13bn	\$7.6bn	\$6.2bn	\$5.8bn	\$4.2bn
EBIT/ Operating Margin	14.8%	14.7%	14%	15%	21%	20%	16%
Online %	35%	12%	20%	27%	32%	25%	15%
Online \$ (directly attributed)	\$8.7bn	\$1.8bn	\$2.6bn	\$2bn	\$2bn	\$1.45bn	\$630m
Total offline sales	\$16.2bn	\$13.2bn	\$10.4bn	\$5.5bn	\$4.2bn	\$4.35bn	\$3.57bn
Digital Influence % *	43%	35%	41%	40%	48%	45%	40%
Offline digitally influenced-sales	\$7bn	\$4.6bn	\$4.3bn	\$2.2bn	\$2bn	\$2bn	\$1.4bn
Digital Contribution	\$15.7bn	\$6.4bn	\$6.9bn	\$4.3bn	\$4bn	\$3.4bn	\$2.1bn
% Digital Contribution	63%	43%	53%	56%	64.6%	59%	49%

\* Digital influence assumptions are applied at a category level, reflecting structural differences between prestige beauty, mass personal care, oral care and diversified CPG portfolios.

The following are believed to include eB2B in their reported/ attributed eCommerce revenues: Henkel, Essity, SCJ, Clorox and Opella

# The Digital Contribution: Prestige & Premium Beauty

L'ORÉAL

ESTÉE  
LAUDER  
COMPANIES

SHISEIDO

Beiersdorf

COTY  
SINCE 1904

Revenues (2025)	\$50.6bn	\$14.3bn	\$6.5bn	\$11.6bn	\$5.9bn
EBIT/ Operating Margin	20.2%	8%	4.6%	14%	20.2%
Online %	31%	21%	30%	22%	25%
Online \$ (directly attributed)	\$15.7bn	\$3bn	\$1.95bn	\$2.55bn	\$1.47bn
Total offline sales	\$35bn	\$11.3bn	\$4.55bn	\$9bn	\$4.4bn
Digital Influence % *	65%	55%	55%	52%	50%
Offline digitally -influenced-sales	\$22.7bn	\$6.2bn	\$2.5bn	\$4.7bn	\$2.2bn
Digital Contribution	\$38.4bn	\$9.2bn	\$4.5bn	\$7.3bn	\$3.7bn
% Digital Contribution	76%	64.5%	68.5%	62.6%	62.5%

\* Digital influence assumptions are applied at a category level, reflecting structural differences between prestige beauty, mass personal care, oral care and diversified CPG portfolios.

# The Digital Contribution: Global Alcohol & Beverage












Revenues (2025)	\$59bn	\$40bn	\$21.7bn	\$12bn	\$11.1bn	\$10bn	\$10.7bn	\$4.2bn	\$1.4bn
EBIT/ Operating Margin	32%	15%	31%	27%	17%	28%	15%	29%	21%
Online %	70% *	59% *	15%	12%	6%	8%	10%	10%	12%
Online \$ (directly attributed)	\$41.3bn	\$23.6bn	\$3.3bn	\$1.44bn	\$670m	\$800m	\$1bn	\$420m	\$170m
Total offline sales	\$17.7bn	\$16.4bn	\$18.5bn	\$10.6bn	\$10.4bn	\$9.2bn	\$9.6bn	\$3.8bn	\$1.2bn
Digital Influence %	34%	30%	32%	35%	28%	30%	28%	36%	34%
Offline digitally influenced-sales	\$6bn	\$4.9bn	\$5.9bn	\$3.7bn	\$2.9bn	\$2.8bn	\$2.7bn	\$1.4bn	\$400m
Digital Contribution	\$47.3bn	\$28.5bn	\$9.2bn	\$5.1bn	\$3.6bn	\$3.6bn	\$3.8bn	\$1.8bn	\$600m
% Digital Contribution	80%	71.3%	42.2%	43%	32.3%	36%	35%	42.4%	42%

\* Includes eb2b

\* AB InBev's figures include BEES which accounts for approx. 70% of the company's total revenues. Factoring in BEES, **AB Inbev** is by far the **most digitally-connected global brand manufacturer** in this category.

Alcohol category digital dynamics vary significantly by regulation and channel structure.

# The Digital Contribution: Consumer Electronics & Devices

	 SAMSUNG	 SONY	 xiaomi	 Panasonic	 hp	 Lenovo	 HUAWEI	 LG Electronics	 Versuni
Revenues (2025)	\$115bn	\$80bn	\$60bn	\$57bn	\$55bn	\$55bn	\$48bn	\$41bn	\$3.5bn
EBIT/ Operating Margin	11.5%	12%	7%	5%	5.7%	6.5%	12%	4.5%	8%
Online %	55%	35%	55%	45%	55%	60%	50%	45%	35%
Online \$ (directly attributed)	\$63bn	\$28bn	\$33bn	\$25.6bn	\$30bn	\$33bn	\$24bn	\$18bn	\$1.2bn
Total offline sales	\$52bn	\$52bn	\$27bn	\$31bn	\$25bn	\$22bn	\$24bn	\$23bn	\$2.3bn
Digital Influence % *	65%	60%	73%	55%	70%	70%	73%	65%	55%
Offline digitally influenced-sales	\$33.6bn	\$31bn	\$19.7bn	\$17.2bn	\$18.6bn	\$15.4bn	\$17.5bn	\$14.7bn	\$1.3bn
Digital Contribution	\$97bn	\$59bn	\$52.7bn	\$43bn	\$47.6bn	\$48.4bn	\$41.5bn	\$33.1bn	\$2.5bn
% Digital Contribution	84.3%	74%	88%	75%	86.5%	88%	86.5%	81%	71%

\* Consumer-only revenues are used where applicable to ensure comparability, e.g. Samsung.

In electronics and device categories, 55-75% digital influence reflects structurally high online research intensity and review-driven purchase journeys.

# The Digital Contribution: Global Toy & Gifting



Revenues (2025)	\$9.5bn	\$5.4bn	\$5bn	\$2.3bn	\$2.2bn
EBIT/ Operating Margin	28%	14%	16%	9%	13%
Online %	38%	28%	30%	35%	32%
Online \$ (directly attributed)	\$3.7bn	\$1.5bn	\$1.5bn	\$810m	\$700m
Total offline sales	\$6bn	\$3.9bn	\$3.5bn	\$1.5bn	\$1.5bn
Digital Influence % *	60%	50%	50%	48%	48%
Offline digitally influenced-sales	\$3.6bn	\$1.9bn	\$1.8bn	\$700m	\$700m
Digital Contribution	\$7.3bn	\$3.5bn	\$3.3bn	\$1.5bn	\$1.4bn
% Digital Contribution	75%	64%	65%	66%	65%

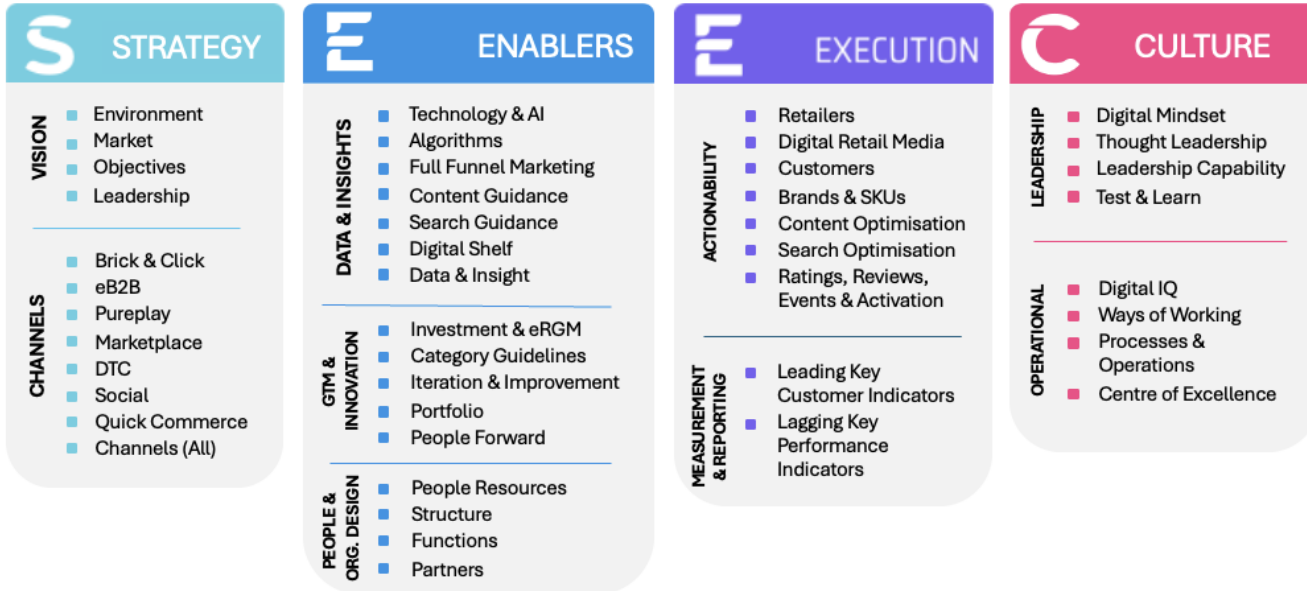
\* Toy category digital influence (45–60%) reflects structurally high parent online research, gifting behaviour and review dependency. Lego's vertically integrated DTC model is factored into assumptions.

# The Digital Contribution: Durables & Appliance Innovators



	Electrolux	dyson	Miele	Shark NINJA	ANKER Innovations
Revenues (2025)	\$13.5bn	\$9bn	\$6bn	\$4.8bn	\$3bn
EBIT/ Operating Margin	3%	17%	12%	14%	12%
Online %	22%	45%	30%	55%	75%
Online \$ (directly attributed)	\$3bn	\$4bn	\$1.8bn	\$2.64bn	\$2.25bn
Total in-store sales	\$10.5bn	\$5bn	\$4.2bn	\$2.2bn	\$750m
Digital Influence % *	62%	70%	65%	70%	70%
Offline digitally influenced-sales	\$6.5bn	\$3.5bn	\$2.7bn	\$1.5bn	\$500m
Digital Contribution	\$9.5bn	\$7.5bn	\$4.5bn	\$4.2bn	\$2.8bn
% Digital Contribution	70.4%	83.5%	75.5%	86.5%	92.5%

\* Durable appliance and device categories are structurally high in digital influence due to extended research cycles and review dependency. Digitally-native brands demonstrate materially higher online penetration than legacy OEM models.



SEEC defines the complete spectrum of digital commerce capabilities proven to drive performance - enabling organisations to understand where they stand, and where to focus to unlock growth.

**Built by practitioners in collaboration with global brand manufacturers.**

## Multi-market discovery

Identifying key capabilities across multiple markets – delivering a total view of cross-market strengths & opportunities/ gaps.

## Market, cross-functional deep dive

How the organisation, and each business function (leadership, dComm, commercial, marketing, finance, supply chain, data/ insights/ analytics...) within a market, are set up to meet overall digital commerce objectives.



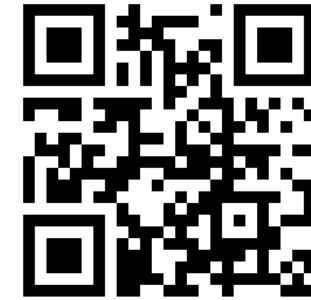


**In-depth benchmarks across the most critical digital commerce activities  
- enabling evidence-based decisions that drive growth**

## Do you know:

- Your Digital Commerce capability scores?
- Your position vs global peers?
- The growth gap embedded in your organisation?
- What peers are doing differently?

*If not, you are competing blind.*



**BENCHMARK**



**QUANTIFY**

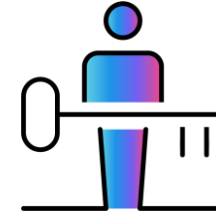


**CLOSE THE GAP**

*DCG's peer industry benchmark intelligence  
is the definitive global standard for measuring Digital Commerce capability.*

Make your organisation's digital commerce capabilities your greatest drivers of profitable growth

[Participate in our benchmarks](#)



Resources



[www.dcg.ai](http://www.dcg.ai)

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