

Spain Social Commerce Market Intelligence and Future Growth Dynamics - 50+ KPIs on Social Commerce Trends by End-Use Sectors, Operational KPIs, Retail Product Dynamics, and Consumer Demographics - 2025 Update

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Report description:

According to PayNXT360, social commerce market in Spain is expected to grow by 26.5% on annual basis to reach US\$13,272.9 million in 2025.

The social commerce market in the country experienced robust growth during 2021-2024, achieving a CAGR of 32.6%. This upward trajectory is expected to continue, with the market forecast to grow at a CAGR of 19.2% during 2025-2030. By the end of 2030, the social commerce sector is projected to expand from its 2024 value of USD 10,495.8 million to approximately USD 31,973.2 million.

This report provides a detailed data-centric analysis of the social commerce sector in Spain, covering market opportunities and risks across a range of retail categories. With over 50+ KPIs at the country level, this report provides a comprehensive understanding of social commerce market dynamics, market size and forecast, and market share statistics.

It breaks down market opportunities in the social commerce sector by type of domestic vs cross-border, type of social platform, type of payment method, business model, end-use consumer segment, and type of city. In addition, it provides a snapshot of consumer behaviour and retail spending dynamics. KPIs in both value and volume terms help in getting an in-depth understanding of end market dynamics.

PayNXT360's research methodology is based on industry best practices. Its unbiased analysis leverages a proprietary analytics platform to offer a detailed view of emerging business and investment market opportunities.

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Key Insights

Spain's social commerce sector is undergoing rapid transformation, driven by increased digital adoption, video-based engagement, and the entry of new platforms. Firms are leveraging social media platforms to enhance consumer interaction and drive sales. Video-centric platforms such as YouTube and Facebook dominate the space, while newer entrants such as TikTok Shop are poised to intensify competition and reshape the market.

Over the next few years, investments in video content, influencer-driven marketing, and AI-powered personalization are expected to further enhance consumer engagement. As social commerce evolves, businesses that successfully adapt to new platforms and optimize their content strategies will maintain a competitive edge. Companies must continuously innovate and tailor their approaches to meet changing consumer expectations in Spain's dynamic digital retail ecosystem.

Rapid Growth of Social Commerce

- The widespread adoption of smartphones and increased internet connectivity have facilitated easier access to social media platforms. Additionally, the convenience of in-app shopping features and targeted advertising strategies have made it more appealing for consumers to shop directly through social media channels.
- As more consumers become comfortable with online shopping, especially through social media, businesses are likely to invest further in optimizing their social commerce strategies. This could lead to more personalized shopping experiences and the integration of advanced technologies to enhance user engagement.

Emergence of New Social Commerce Platforms

- New social commerce platforms are reshaping Spain's e-commerce landscape by introducing innovative shopping experiences tailored to digital-first consumers. The recent launch of TikTok Shop in Spain at the end of 2024 highlights the increasing role of short-form video platforms in driving sales. This entry signals a shift in consumer behavior, as younger audiences turn to social media for entertainment and shopping, blurring the lines between content consumption and e-commerce.
- The primary driver of this trend is the rising popularity of influencer-driven marketing and algorithm-based content discovery. Platforms such as TikTok use sophisticated recommendation engines to connect users with products that match their interests, fostering highly personalized shopping experiences. This seamless integration of entertainment and commerce enhances consumer engagement and encourages impulse purchases, giving brands new opportunities to reach potential buyers more organically.
- Expanding platforms such as TikTok Shop are expected to heighten competition in Spain's social commerce space over the next two to four years. Businesses must adapt by diversifying their marketing strategies across multiple platforms while investing in influencer collaborations and interactive shopping formats. Companies that successfully leverage emerging platforms and embrace data-driven content strategies will be well-positioned to capitalize on Spain's rapidly evolving digital commerce market.

Dominance of Mobile Shopping

- Mobile shopping has become the dominant force in Spain's e-commerce sector, with nearly 73% of all online sales conducted via mobile devices. Consumers increasingly rely on their smartphones for shopping due to the ease of browsing, purchasing, and accessing personalized recommendations. This shift has prompted retailers to enhance their mobile platforms, ensuring seamless transactions and optimized user experiences.
- The primary drivers of this trend are the widespread availability of high-speed internet and the high penetration of smartphones in Spain. Consumers prefer the convenience of shopping on the go, leading businesses to invest in mobile-first strategies, such as app-based loyalty programs, AI-driven product recommendations, and seamless mobile payment options such as Naver Pay and Kakao Pay. Retailers that fail to adapt to this mobile-centric landscape risk losing customers to competitors offering superior

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digital experiences.

- Over the next two to four years, the focus on mobile-friendly shopping experiences is expected to strengthen, with continued investments in app development and mobile-responsive platforms. Companies that integrate emerging technologies such as augmented reality (AR) for virtual product trials and AI-driven chatbots for customer service will likely gain a competitive edge. As mobile commerce solidifies its primary sales channel, businesses prioritizing mobile innovation will be best positioned to capture Spain's tech-savvy consumer base.

Competitive Landscape and Regulatory Developments in Spain's Social Commerce Market

Spain's social commerce sector is on a strong growth trajectory, driven by increased digital adoption, evolving consumer preferences, and the strategic expansion of key industry players. Established e-commerce companies such as Amazon and El Corte Ingles, alongside global entrants such as Alibaba and Shein, are reshaping the competitive landscape. The rise of new marketplaces such as Miravia signals the increasing importance of localized strategies to capture Spain's digital consumer base.

Over the next few years, the market is expected to intensify as companies invest in partnerships, technology integration, and platform-specific commerce strategies. Regulatory changes, particularly concerning online safety and social media advertising, may introduce new compliance challenges for businesses operating in the sector. To remain competitive, companies must stay agile, leveraging innovation and regulatory awareness to adapt to Spain's rapidly evolving social commerce environment.

Current State of the Social Commerce Market

- Spain's social commerce expansion is driven by the widespread adoption of social media platforms and the integration of shopping features within these platforms, facilitating seamless purchasing experiences for consumers.
- The high penetration of smartphones and improved internet connectivity have further fueled this trend, enabling consumers to engage in social commerce conveniently. As a result, businesses are increasingly leveraging social media channels to reach a broader audience and enhance customer engagement.

Key Players and New Entrants

- Established e-commerce platforms such as Amazon and El Corte Ingles have recognized the potential of social commerce and are leveraging social media channels to enhance their reach. Additionally, global players such as Alibaba have entered the Spanish market, intensifying competition. Alibaba's recent initiatives include the launch of Miravia, a marketplace tailored for the Spanish audience, indicating a strategic move to establish a strong foothold in the region.
- New entrants, including international fast-fashion retailer Shein, have also made significant inroads. Shein's pop-up events in major Spanish cities have attracted large crowds, highlighting the brand's growing popularity among Spanish consumers. This influx of global competitors reshapes the local social commerce landscape, prompting domestic retailers to innovate and adapt.

Recent Launches, Mergers, and Acquisitions

- The competitive landscape has seen notable activities aimed at consolidation and expansion. For instance, in September 2024, Miravia acquired a 20% stake in the Spanish company Vdshop, specializing in developing online sales platforms. This move will strengthen Miravia's position in Spain's competitive e-commerce market.
- Additionally, international companies have established regional partnerships to tap into the Spanish market. These strategic alliances aim to enhance service offerings and expand market reach, reflecting the dynamic nature of Spain's social commerce sector.

Outlook

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- Over the next 2-4 years, Spain's social commerce landscape is expected to become increasingly competitive, with established players and new entrants striving for market share. Strategic partnerships and joint ventures are likely to continue as companies seek to leverage synergies and enhance their service offerings.
- Regulatory developments will play a crucial role in shaping the competitive dynamics, with potential new laws influencing platform operations and competitive strategies. Companies must stay abreast of these changes to navigate the evolving landscape effectively.

Regulatory Changes

- Spain has been considering regulatory measures to enhance online safety in the past year, particularly for younger users. Discussions have been underway regarding implementing age restrictions for social media access, similar to policies adopted in other countries. These potential regulations aim to protect minors from online harm and could impact how social commerce platforms operate, especially concerning advertising and content targeting younger demographics.

Table of Contents:

1. About this Report
 - 1.1. Summary
 - 1.2. Methodology
 - 1.3. Social Commerce Definitions
 - 1.4. Disclaimer
2. Spain Ecommerce Industry Market Size and Future Growth Dynamics by Key Performance Indicators
 - 2.1. Spain Ecommerce - Gross Merchandise Value Trend Analysis, 2021-2030
 - 2.2. Spain Ecommerce - Average Value Per Transaction Trend Analysis, 2021-2030
 - 2.3. Spain Ecommerce - Transaction Volume Trend Analysis, 2021-2030
3. Spain Social Commerce Industry Market Size and Future Growth Dynamics by Key Performance Indicators
 - 3.1. Spain Social Commerce - Gross Merchandise Value Trend Analysis, 2021-2030
 - 3.2. Spain Social Commerce - Average Value Per Transaction Trend Analysis, 2021-2030
 - 3.3. Spain Social Commerce - Transaction Volume Trend Analysis, 2021-2030
 - 3.4. Spain Social Commerce Market Share Analysis by Key Players, 2024
4. Spain Social Commerce Industry Market Size and Forecast by Location
 - 4.1. Spain Social Commerce Market Share by Location (%), 2024
 - 4.2. Spain Social Commerce by Cross Border - Gross Merchandise Value Trend Analysis, 2021-2030
 - 4.3. Spain Social Commerce by Domestic - Gross Merchandise Value Trend Analysis, 2021-2030
5. Spain Social Commerce Industry Market Size and Forecast by Product Categories
 - 5.1. Spain Social Commerce Market Share by Product Categories (%), 2024
 - 5.2. Spain Social Commerce Clothing & Footwear - Gross Merchandise Value Trend Analysis, 2021-2030
 - 5.3. Spain Social Commerce Beauty and Personal Care - Gross Merchandise Value Trend Analysis, 2021-2030
 - 5.4. Spain Social Commerce Food & Grocery - Gross Merchandise Value Trend Analysis, 2021-2030
 - 5.5. Spain Social Commerce Appliances and Electronics - Gross Merchandise Value Trend Analysis, 2021-2030
 - 5.6. Spain Social Commerce Home Improvement - Gross Merchandise Value Trend Analysis, 2021-2030
 - 5.7. Spain Social Commerce Travel - Gross Merchandise Value Trend Analysis, 2021-2030
 - 5.8. Spain Social Commerce Accommodation - Gross Merchandise Value Trend Analysis, 2021-2030

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6. Spain Social Commerce Industry Market Size and Forecast by End Use Consumer Segment
 - 6.1. Spain Social Commerce Market Share by End Use Segment (%), 2024
 - 6.2. Spain Social Commerce B2C Segment - Gross Merchandise Value Trend Analysis, 2021-2030
 - 6.3. Spain Social Commerce B2B Segment - Gross Merchandise Value Trend Analysis, 2021-2030
 - 6.4. Spain Social Commerce C2C Segment - Gross Merchandise Value Trend Analysis, 2021-2030

7. Spain Social Commerce Industry Market Size and Forecast by End Use Device
 - 7.1. Spain Social Commerce Market Share by End Use Device (%), 2024
 - 7.2. Spain Social Commerce by Mobile - Gross Merchandise Value Trend Analysis, 2021-2030
 - 7.3. Spain Social Commerce by Desktop - Gross Merchandise Value Trend Analysis, 2021-2030

8. Spain Social Commerce Industry Market Size and Forecast by Cities
 - 8.1. Spain Social Commerce Market Share by Cities (%), 2024
 - 8.2. Spain Social Commerce by Tier-1 Cities - Gross Merchandise Value Trend Analysis, 2021-2030
 - 8.3. Spain Social Commerce by Tier-2 Cities - Gross Merchandise Value Trend Analysis, 2021-2030
 - 8.4. Spain Social Commerce by Tier-3 Cities - Gross Merchandise Value Trend Analysis, 2021-2030

9. Spain Social Commerce Industry Market Size and Forecast by Payment Method
 - 9.1. Spain Social Commerce Market Share by Payment Method (%), 2024
 - 9.2. Spain Social Commerce Payment by Credit Card - Gross Merchandise Value Trend Analysis, 2021-2030
 - 9.3. Spain Social Commerce Payment by Debit Card - Gross Merchandise Value Trend Analysis, 2021-2030
 - 9.4. Spain Social Commerce Payment by Bank Transfer - Gross Merchandise Value Trend Analysis, 2021-2030
 - 9.5. Spain Social Commerce Payment by Prepaid Card - Gross Merchandise Value Trend Analysis, 2021-2030
 - 9.6. Spain Social Commerce Payment by Digital & Mobile Wallet - Gross Merchandise Value Trend Analysis, 2021-2030
 - 9.7. Spain Social Commerce Payment by Other Digital Payment - Gross Merchandise Value Trend Analysis, 2021-2030
 - 9.8. Spain Social Commerce Payment by Cash - Gross Merchandise Value Trend Analysis, 2021-2030

10. Spain Social Commerce Industry Market Size and Forecast by Platforms
 - 10.1. Spain Social Commerce Market Share by Platforms Method (%), 2024
 - 10.2. Spain Social Commerce Platforms by Video Commerce (Live Stream + Prerecorded) - Gross Merchandise Value Trend Analysis, 2021-2030
 - 10.3. Spain Social Commerce Platforms by Social Network-Led Commerce - Gross Merchandise Value Trend Analysis, 2021-2030
 - 10.4. Spain Social Commerce Platforms by Social Reselling - Gross Merchandise Value Trend Analysis, 2021-2030
 - 10.5. Spain Social Commerce Platforms by Group Buying - Gross Merchandise Value Trend Analysis, 2021-2030
 - 10.6. Spain Social Commerce Platforms by Product Review Platforms - Gross Merchandise Value Trend Analysis, 2021-2030

11. Spain Social Commerce Industry Market Size and Forecast by Contents
 - 11.1. Spain Social Commerce Market Share by Contents (%), 2024
 - 11.2. Spain Social Commerce Contents by Live Streamers - Gross Merchandise Value Trend Analysis, 2021-2030
 - 11.3. Spain Social Commerce Contents by Gaming Streamers - Gross Merchandise Value Trend Analysis, 2021-2030
 - 11.4. Spain Social Commerce Contents by Reels - Gross Merchandise Value Trend Analysis, 2021-2030
 - 11.5. Spain Social Commerce Contents by Influencers - Gross Merchandise Value Trend Analysis, 2021-2030
 - 11.6. Spain Social Commerce Contents by Stories - Gross Merchandise Value Trend Analysis, 2021-2030

12. Spain Social Commerce Industry Market Size and Forecast by Consumer Demographics & Behaviour
 - 12.1. Spain Social Commerce Spend Share by Age Group, 2024

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- 12.2. Spain Social Commerce by Age Group - Gen Z (15-27) - Gross Merchandise Value Trend Analysis, 2021-2030
- 12.3. Spain Social Commerce by Age Group - Millennials (28-44) - Gross Merchandise Value Trend Analysis, 2021-2030
- 12.4. Spain Social Commerce by Age Group - Gen X (45 - 60) - Gross Merchandise Value Trend Analysis, 2021-2030
- 12.5. Spain Social Commerce by Age Group - Baby Boomers (60+) - Gross Merchandise Value Trend Analysis, 2021-2030
- 12.6. Spain Social Commerce Share by Income Level, 2024
- 12.7. Spain Social Commerce Share by Gender, 2024

13. Further Reading

- 13.1. About PayNXT360
- 13.2. Related Research

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