

# TOP 8 GLOBAL B2C E-COMMERCE COUNTRY SALES FORECASTS: 2015 TO 2018

PUBLICATION DATE: JULY 2015

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## ABOUT YSTATS.COM

- Founded in 2005 and headquartered in Hamburg, Germany, yStats.com is one of the world's leading secondary market research companies.
- We are committed to providing the most up-to-date and objective data on Global B2C E-Commerce and Online Payment markets to sector-leading companies worldwide.
- Our multilingual staff researches, gathers, filters and translates information from thousands of reputable sources to synthesize accurate and timely reports in our areas of expertise, covering more than 100 countries and all global regions.
- Our market reports focus predominantly on online retail and payments, but also cover a broad range of related topics including M-Commerce, Cross-Border E-Commerce, E-Commerce Delivery, Online Gaming and many others.
- Given our numerous citations in leading media sources and journals worldwide, including Forbes and the Wall Street Journal, we are considered one of the most highly-reputed international secondary market research companies with an expertise in the areas of B2C E-Commerce and Online Payment.

## TOP 8 GLOBAL B2C E-COMMERCE COUNTRY SALES FORECASTS: 2015 TO 2018

### GENERAL INFORMATION

#### PRODUCT DETAILS

Title:	Top 8 Global B2C E-Commerce Country Sales Forecasts: 2015 to 2018
Type of Product:	Market Report
Category:	B2C E-Commerce
Covered Regions:	N/A
Covered Countries:	China, Russia, USA, UK, Germany, France, Japan, South Korea
Language:	English
Formats:	PDF & PowerPoint
Number of Charts:	116

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#### QUESTIONS ANSWERED IN THIS REPORT

Which 8 countries are the leaders on the global B2C E-Commerce market?  
How will the 8 leaders compare in terms of share of global online retail sales in the next years?  
What growth rates are forecasted for these markets by various sources?  
How large will B2C E-Commerce sales in these countries be by 2018?

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## TOP 8 GLOBAL B2C E-COMMERCE COUNTRY SALES FORECASTS: 2015 TO 2018

### KEY FINDINGS



### FORECASTS FOR THE LEADING B2C E-COMMERCE MARKETS WORLDWIDE PUBLISHED

B2C E-Commerce sales generated by the eight leading markets: the USA, China, the UK, Japan, Germany, France, South Korea and Russia, ranked in that order, are predicted to grow at different rates, ranging from high one-digit numbers to moderate double-digit numbers in annual percentage change by 2018. The two emerging markets within this rank, China and Russia, predictably outpace their advanced counterparts in terms of growth rate. Overall, though sales growth is a common trend expected across all eight markets, each country's share of total global B2C E-Commerce sales is predicted to decrease, with a notable exception of China. Due to the increasing share of China, however, the top 8 countries combined are predicted to retain their vast share of global sales, reaching over three quarters.

China and the USA battle for leadership in terms of sales volume. Forecasts indicate that US B2C E-Commerce sales will still top those of China over the span of the next few years, excluding C2C. However, when B2C and C2C are considered together, China clearly outpaces the USA in online retail sales. The UK and South Korea achieved the first and second rank based on a different criterion: these markets are predicted to have the highest B2C E-Commerce penetration on domestic retail sales, with values already in two-digit ranges.

Diverse as the markets are, there are some visible common trends, including the growing significance of M-Commerce and cross-border online shopping, as well as the rise of the seamless shopping experience across channels. There are also some similarities among the top market players: for example, global online merchant Amazon ranks high in at least half of the investigated top markets. However, there are also some other companies with international reach among the major market players, including the Otto Group, Tesco and Cdiscount, as well as local companies with significant shares of the domestic markets of the top eight countries, such as SK Planet, Ulmart or JD.com.

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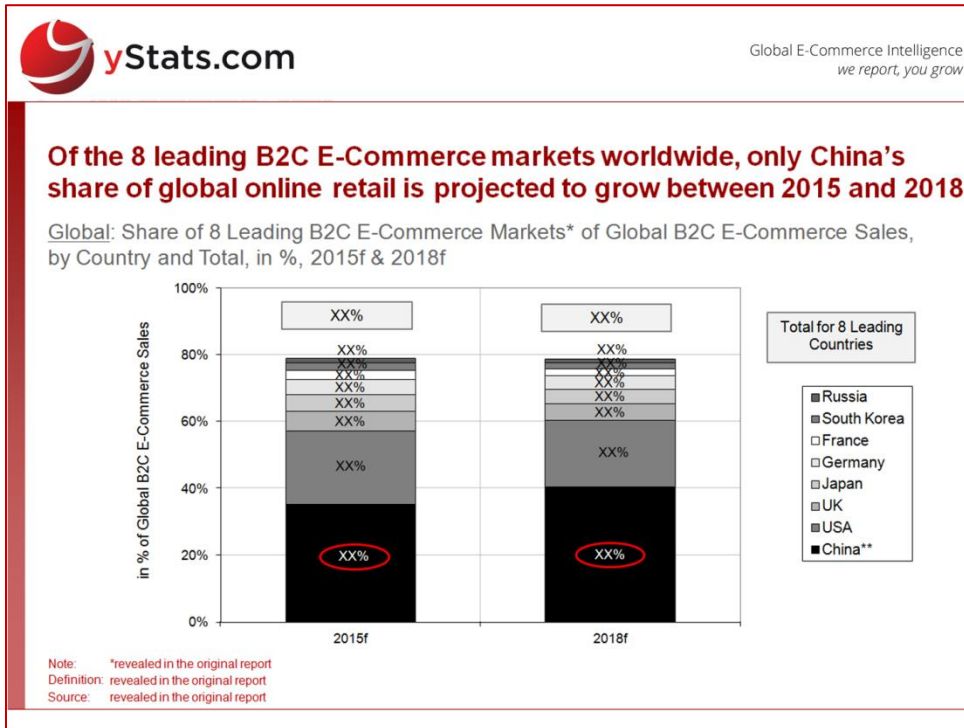
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# TOP 8 GLOBAL B2C E-COMMERCE COUNTRY SALES FORECASTS: 2015 TO 2018

## REPORT-SPECIFIC SAMPLE CHARTS




**Various sources forecast that B2C E-Commerce sales in China will top USD XXX (EUR XXX) in 2017, 2018 or 2019.**

China: Comparative Estimates of B2C E-Commerce Sales Forecasts, in USD billion, Ranked by CAGR\*, 2013 - 2019f

Source	2013	2014	2015f	2016f	2017f	2018f	2019f	CAGR*	Definition
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report
Revealed in the original report	XXX	XXX	XXX	XXX	XXX	XXX	XXX	+XX%	Revealed in the original report

Note: \*revealed in the original report  
 Source: revealed in the original report

## TOP 8 GLOBAL B2C E-COMMERCE COUNTRY SALES FORECASTS: 2015 TO 2018 METHODOLOGY

### GENERAL METHODOLOGY OF OUR MARKET REPORTS

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.
- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Subtitle, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.
- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.
- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies are most often used. When referencing currency values in the Action Title, the EUR values are also provided in brackets. The conversions are always made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.
- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

### METHODOLOGY OF OUR TOP 8 GLOBAL B2C E-COMMERCE COUNTRY SALES FORECASTS: 2015 TO 2018 REPORT

- This report covers the forecasts for B2C E-Commerce sales in the 8 leading B2C E-Commerce markets. The countries were chosen based on their ranking worldwide in terms of B2C E-Commerce sales, share of global online retail, and market potential.
- The forecasts were produced by various reputable sources and may vary in definition, methodology used and the time period referenced. The report is based on purely secondary market research and does not contain any sales forecasts produced by the report publisher.
- The report starts with international comparisons, where the selected countries are compared in terms of forecasted growth rates, sales, online share of total retail in the country and share of global B2C E-Commerce sales. In some cases, several sources were used in one chart to produce a comprehensive comparison. The rest of the report contains information on each country, presented in the order of the country's share in global sales.
- Within the country chapters, the first section provides an overview of B2C E-Commerce market in the relevant country. The overview includes information about Internet and online shopper penetration, major market trends and market players.
- The next chapter summarizes all forecasts included in the report in one table, featuring source, forecasts for each available year, CAGR and definition. The CAGR in the table varies with respect to the time period referenced by various sources. CAGR is reported based on sales in original currency used by the source, while the reported sales values might have been converted to another currency for better comparability. This chapter also contains the projected change in share of the country in global B2C E-Commerce sales and in share of B2C E-Commerce on total retail sales in the country.
- The rest of the report contains charts with forecasts produced by various sources. Each chart contains B2C E-Commerce sales forecast for the relevant country from one source. Where applicable, year-on-year or CAGR growth rates are shown. The sales values shown on the chart are in the currency as used by the source. The source and any notes and definitions related to the forecast are included on the chart. The charts are included in the order of descending CAGR.

## TOP 8 GLOBAL B2C E-COMMERCE COUNTRY SALES FORECASTS: 2015 TO 2018

### RELATED REPORTS

#### PUBLISHED RELATED REPORTS

REPORT	PUBLICATION DATE	PRICE *
China B2C E-Commerce Sales Forecasts: 2015 to 2018	July 2015	€ 450
Russia B2C E-Commerce Sales Forecasts: 2015 to 2018	July 2015	€ 450
UK B2C E-Commerce Sales Forecasts: 2015 to 2018	July 2015	€ 450
Germany B2C E-Commerce Sales Forecasts: 2015 to 2018	July 2015	€ 450
France B2C E-Commerce Sales Forecasts: 2015 to 2018	July 2015	€ 450
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Japan B2C E-Commerce Sales Forecasts: 2015 to 2018	July 2015	€ 450
South Korea B2C E-Commerce Sales Forecasts: 2015 to 2018	July 2015	€ 450
Global B2C E-Commerce & Online Payment Market 2014	October 2014	€ 5,950
Global Clothing B2C E-Commerce Market 2015	January 2015	€ 3,450
Global B2C E-Commerce Market 2014	October 2014	€ 4,950
Global M-Commerce 2015: Smartphones & Tablets	March 2015	€ 1,950
Global Online Payment Methods: Full Year 2014	March 2015	€ 3,950
Global Online Gaming Market 2015	April 2015	€ 1,950
Global Cross-Border B2C E-Commerce 2014	April 2015	€ 3,450
Asia-Pacific B2C E-Commerce Market 2014	August 2014	€ 3,950
Eastern Europe B2C E-Commerce Market 2014	October 2014	€ 2,950

#### UPCOMING RELATED REPORTS

REPORT	PUBLICATION DATE	PRICE*
Global Online Payment Methods: First Half 2015	July 2015	€ 1,950
Global Cross-Border B2C E-Commerce Market 2015	August 2015	€ 2,950
Global Delivery B2C E-Commerce Market 2015	August 2015	€ 2,950

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### SELECTED CLIENTS

#### INTERNET

- Google
- Amazon
- eBay
- Skype
- Newegg
- Avira
- Digital River
- First Data
- Deutsche Telekom
- 1&1
- Brightcove

#### FINANCE

- Goldman Sachs
- Credit Suisse
- Bank of America Merrill Lynch
- Citigroup
- Oppenheimer & Co.
- Morgan Stanley

#### CONSULTING

- Boston Consulting Group
- Deloitte
- Bain & Company
- Accenture

#### RETAIL

- OTTO Group
- Amway
- Costco
- Tchibo Direct
- Diesel

#### OTHER

- Nintendo
- Bwin
- Lego
- Redbull
- BASF
- Beiersdorf



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### FREQUENTLY ASKED QUESTIONS

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##### ■ What is your research methodology?

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##### ■ From which sources is information for reports derived?

Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all data obtained.

##### ■ Is information in the reports comparable across countries?

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##### ■ Can I purchase only selected parts of a report?

Unfortunately, our market reports are only sold as a whole.

##### ■ Is there an overlap between country, regional and global reports on the same topic?

Some reports can have overlapping content, such as regional reports containing content from parts of individual country reports. Please consult the Table of Contents or contact us if any questions should arise.

##### ■ I would like to see a sample of a report. Where can I find it?

Free sample charts from each report can be viewed in the product brochure. Also a standard free sample is available for download from each report page. To get an idea what our reports look like you can download a standard Free Full Report from our online shop.

## ABOUT YSTATS.COM

### FREQUENTLY ASKED QUESTIONS

#### OUR PRODUCTS (CONT.)

##### ■ When will an update of a particular report be published?

In general, our market reports are published on an annual basis. Online Payment reports are updated on a semiannual basis. Please consult the “Upcoming Reports” section on our homepage or “Related Reports” section of our product brochure. We have a publication schedule that we adhere to, so if you’d like to know about a specific report, please contact us.

##### ■ Do you offer subscriptions to reports?

Yes, we do have a number of subscription options called “Full Access”. Full Access subscribers gain access to all B2C E-Commerce and online payment reports in our collection, plus access to all new reports published within the duration of their subscription. They benefit from immediate access to global coverage. Full Access subscribers enjoy the benefits of a Global Site Licence, which allows up to 10 employees from the company worldwide to access the reports. Some leading international enterprises subscribe to our reports to get the most comprehensive insight into B2C E-Commerce and online payment markets worldwide contained in our market reports collection and ensure cost efficiency. There are several Full Access subscription options varying in duration. For more information on our various Full Access Subscription offers, see our Full Access Subscription page and contact us.

#### OUR SERVICES

##### ■ I need more information about a particular topic. Do you offer further products or services?

Apart from market reports, we also offer Custom Research. With our Custom Research solutions, you receive research tailored to your needs, answering your specific questions. The Custom Research types include In-Depth Industry Research, Competitive Intelligence and Company Profiles, Corporate Customer Identification in international markets, Investor Snapshots and Country Fact Sheets.

##### ■ I still need help finding the right report – do you offer additional personal search?

yStats.com offers services in which our researchers who prepare the reports can point you to the appropriate report to suit your needs. If you want to take advantage of this free service, please contact us.

#### ORDERING & DELIVERY

##### ■ How do I order a report?

Our reports can be purchased most easily through our Online Shop, but are also available for purchase offline.

To purchase a report from our Online Shop:

Choose the relevant report and appropriate license, click „Add to Cart”, then complete the necessary check out steps. Payment options include major credit cards (MasterCard, Visa, or China UnionPay) or PayPal. Once your online payment has been completed, you will be able to click on „Download”, which will take you to your “my yStats” account, from where your report will be available as a PDF and PPT for download.

To purchase a report via fax or email with PDF attachment:

To order a report offline, please complete and sign the “Fax Order” form, which can be located on the right-hand side of the webpage next to the report overview or in the product brochure. Send the completed and signed order form through fax or email (as a PDF attachment) as indicated on the form. An Invoice will be sent to you afterwards asking for payment via bank transfer, credit card, or PayPal. After the payment is processed successfully, you will be given the access details to the report.

##### ■ Will I get an invoice?

For online shop purchases, an invoice will be sent to you automatically via email to the email address entered in the billing details immediately after completion of payment. For offline orders, an invoice is sent per email after the complete order form is received.

##### ■ How long does delivery take?

All of our reports are delivered online. All reports ordered online via our Online Shop are available for download immediately following successful processing of payment. For all orders made offline, upon successful processing of payment, access details will be sent via email.

##### ■ Do I have to pay tax if I purchase a report?

Customers from Germany have to pay an additional tax rate of 19%. Customers from the European Union (EU) do not have to pay tax if they enter a valid VAT Identification Number. Customers from non-EU countries do not have to pay tax. Moreover, tax has to be paid for all private purchases from the EU.

##### ■ What is yStats.com’s VAT number?

yStats.com’s VAT number is DE 251661218

#### POLICIES



##### ■ What is yStats.com’s return/refund/cancellation policy?

Since our reports are information-based digital products and therefore consumed upon purchase/download, we will not refund, allow cancellation or accept any returns of orders. Please read through all information about a product before purchasing. If you should have any questions about a product, please do not hesitate to contact us via our contact details as listed on our homepage.




# ORDER FORM

## PLACE YOUR ORDER OFFLINE

-  Scan and email this form to [order@ystats.com](mailto:order@ystats.com)
-  Fax us at + 49 40 39 90 68 51 using this form

## PLACE YOUR ORDER ONLINE

-  All our reports are also available for purchase online in our Online Shop.

## CHOOSE YOUR REPORT(S) AND LICENSE\* TYPE(S)

Please confirm the license type and reports:

Report Title	Publication Date	Price (€)	SINGLE USER LICENSE	SITE LICENSE	GLOBAL SITE LICENSE
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL			_____	_____	_____

## PAYMENT METHODS

Choose Your Preferred Payment Method:

**Credit Card**

VISA  MasterCard  China UnionPay

CARD HOLDER \_\_\_\_\_  
 CARD NUMBER \_\_\_\_\_  
 EXP. DATE \_\_\_\_\_  
 SECURITY CODE\*\* \_\_\_\_\_

\*\*If you prefer, this can be communicated over the phone or via secured e-mail communication.

**PayPal**

An invoice will be sent via e-mail to the e-mail address as listed in the contact details below. Payment via PayPal will be made available upon receipt of the invoice.

**Bank Transfer** (offline orders only)

Bank Transfer information will be provided to you in the invoice you receive following submission of an Order Form offline.

## COMPLETE YOUR CONTACT DETAILS

An Invoice will be sent to your company

TITLE _____	FIRST NAME, LAST NAME _____	JOB TITLE _____
COMPANY _____	E-MAIL _____	PHONE _____
FAX _____	STREET _____	CITY _____
STATE/PROVINCE _____	COUNTRY _____	POSTAL CODE _____

## SIGNATURE

## HOW DID YOU FIND US?

- Search Engine (Google, Bing etc.)
- Print/Online Publication
- Press Release
- Facebook/Twitter
- LinkedIn/XING
- Personal Recommendation
- Others \_\_\_\_\_

EU COMPANIES  
MUST SUPPLY VAT NO.

PURCHASE ORDER NO. (IF REQUIRED) \_\_\_\_\_

ORDER DATE \_\_\_\_\_

All orders are subject to the Terms & Conditions contained on our website. All reports are provided in PDF and PowerPoint formats. yStats.com may contact you in the future about receiving our free newsletter or other mailing. If you do not wish to be contacted, please advise us accordingly. Your contact information will not be sold or shared with other organizations.

\* Please be advised that when purchasing a report, you have the option to choose between a Single User License (allowing one single user access to the report), a Site License (allowing up to 10 users in a particular geographic location access to the report), or a Global Site License (allowing 10 users of a company worldwide to access the report). Please choose the license that suits your needs best. Failure to comply with our Terms and Conditions with respect to appropriate license usage may result in legal action.

# TERMS AND CONDITIONS

yStats.com GmbH & Co. KG provides its services exclusively to contracting partners and users of its website according to Sec. 14 German Civil Code ("you") subject to the following Terms and Conditions. By visiting our website, shopping at the online store provided by yStats.com, or placing an order offline for any of our products, subscriptions and services, you acknowledge that you are bound by the following Terms and Conditions, which are, unless explicitly agreed upon otherwise in writing, the entirety of the "Contract", as defined in 1.1, between yStats.com GmbH & Co. KG and you. Terms and Conditions are subject to change at any time without prior notice, based on the discretion of yStats.com GmbH & Co. KG, the most current of which are readily available on our website.

We herewith contradict any terms and conditions of purchase by our customers which will not become part of the Contract.

## 1. SCOPE

1.1 The following terms and conditions apply to our entire contract (the "Contract") between yStats.com GmbH & Co. KG (hereinafter also referred to as "we" or "us") with our customers regarding (i) the purchase of our reports both on- and offline, (ii) custom research services, (iii) full access subscriptions, and (iv) any other contracts between us and our customers executed with reference to these terms and conditions (any reports and other services and products which we may make available to the customer under a Contract hereinafter the "products").

1.2 Agreements contrary to these terms and conditions require our express written confirmation. Deviations between these terms and conditions and the contents of the Order Form will be accepted if and only if expressly agreed upon by both our customer(s) and us in writing, limited to the case of custom research orders, at which point the contents of the Order Form shall prevail.

## 2. REPORT AND FULL-ACCESS SUBSCRIPTION OFFERS & ORDERS

2.1 With respect to the purchase of our Market Reports, purchase can be made either online or offline.

2.2 Our homepage contains information about pricing, acceptable payment methods and product brochures. To purchase a Market Report directly from our online shop, simply click 'Add to Cart', then 'Proceed to Checkout', where registration and payment details can be entered. As soon as payment is processed successfully, you will receive an invoice via email and the Report will be available online for download.

2.3 To purchase a Market Report offline (not via the online shop) simply print the Report Order Form from the appropriate online brochure or by clicking on the Fax Order button on our webpage. Simply fill out the Report Order Form, have a duly authorized representative sign the Report Order Form and then submit the Report Order Form to us via facsimile or email with PDF-attachment. Upon receipt of a completed Report Order Form, you will obtain an invoice detailing the product ordered, price, and date of payment. Upon successful processing of payment, access and log-in details will be forwarded to the purchaser within two (2) business days.

2.4 If you order our product "Market Reports", you gain access to the ordered report as identified in the Report Order Form and you may use that report in accordance with Section 5.3 below and the other provisions of the Contract.

2.5 To purchase one of our Full Access Subscriptions, please contact us through the appropriate forum on our website, located under the Full Access tab on our homepage. Once we receive an inquiry, we will forward an Order Form to be filled out and signed by a duly authorized representative. Once this Order Form has been completed and signed, please send the Order Form via facsimile or email with PDF-attachment. Upon receipt of the completed Order Form, we will send an invoice detailing price of the "Full Access Subscription" and payment method options. Upon successful processing of payment, access and log-in details will be forwarded to the purchaser within two (2) business days. The provision of this information constitutes the acceptance should you not have been provided with a separate acceptance in writing.

2.6 If you order one of our "Full Access Subscriptions", you gain access to any E-Commerce reports within the scope of your chosen subscription (excluding all custom research services) currently available on our website during the subscription timeframe as identified in the "Order Form" as of the date of the execution of the Contract, and you may use those reports as a "Global Site License" in accordance with Section 5.3 below and the other provisions of the Contract.

## 3. CUSTOM RESEARCH OFFERS & ORDERS

3.1 Unless expressly agreed upon otherwise in writing, the contents of our offers may not be made available in whole or in part to any third party outside your organization.

3.2 With respect to research services, upon inquiry, we submit an offer to you in the form of a "Research Order Form" as a PDF, accompanied with a proposal stating the nature of the issue to be researched, the services to be rendered, the time required for the study, structure of payments (if any) and the total fee due. You accept this offer by completing the Research Order Form, having a duly authorized representative sign the Research Order Form and then submitting the Research Order Form to us via facsimile or email with PDF-attachment.

## 4. TERMS OF PAYMENT

4.1 All prices for offline orders are to be derived exclusively from the Order Form and/or the documents referred therein. All prices for orders placed via the online shop are those which are displayed on our website.

4.2 All prices are net and without transportation costs, if applicable. Value Added Tax, if applicable, at the statutory rate shall be added to all fees payable hereunder.

4.3 For all services that go beyond the scope as agreed under the Order Form, a reasonable additional fee for these services shall be discussed and agreed upon with the customer before commencement of any work and will be itemized on the final Invoice (if applicable) sent to the customer.

4.4 We will send our Invoice to you upon execution of the Contract, unless agreed otherwise in the Order Form. In the event that you order our product "Full Access Subscription", we will send our invoice for the first contract year upon execution of the Contract. Any Invoice(s) for any subsequent contract year(s), will be sent to you upon commencement of each contract year.

4.5 All payments shall be due and payable immediately upon the date set forth in the Invoice, without any deductions. Products will not be dispatched and services will not commence until successful processing of payment, excluding the case of custom research orders, in which structured payment terms will be outlined on the Order Form.

4.6 All customers' rights of retention or set-off are hereby excluded to the extent that they are not based on the same contractual relationship. Retentions or set-offs are allowed only if the customer's claim is undisputed, has become unappealable or is ready for decision.

4.7 In the event of a customer's default in payment or other apparent credit unworthiness, all remaining claims against that customer shall become immediately due and payable in full. This only applies if the customer is responsible for the default. We shall be entitled to rescind payment terms previously agreed upon and to demand payment in advance or other appropriate security with respect to pending deliveries. A customer shall be deemed unworthy of credit in particular when he files a petition in bankruptcy or composition proceedings.

## 5. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES

5.1 All copyrights and other intellectual property rights in connection with our products and all contents of our website remain with us. All data carriers remain our property. The customer/user may not modify, publish, transmit, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way exploit any of the products made available by us, in whole or in part, except as expressly permitted under the Contract.

5.2 We, as well as any original sources contained within our product, must expressly be named as the author of any data the customer processes further as contractually negotiated.

5.3 Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, perpetual right to use the products provided for your internal purposes or any additional purposes set out in the Order Form.

5.4 In the event that the parties agree on a "Single User License" under the Order Form, this means that only one (1) individually named user of an organization shall be entitled to access the report(s). In the event that the parties agree on a "Site License" under the Order Form, this means that up to ten (10) users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a "Global Site License", this means that up to ten (10) worldwide users of an organization shall be entitled to access the report. In both cases, the term "organization" refers to your specific company only and excludes any third parties, including affiliates.

## 6. TECHNICAL INFORMATION

6.1 We shall provide our products in the following standardized data formats: PowerPoint and PDF. For custom research reports, Excel documents may also be provided, upon request.

6.2 You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.

6.3 Upon successful processing of payment, purchases made via the online shop will be immediately available to download. For all offline purchases, upon successful processing of payment, you will receive the requested product(s) and service(s) in the aforementioned standardized data formats, and all additional data pertaining thereto within two (2) business days.

## 7. DEFECTS AS TO QUALITY

7.1 No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.

7.2 Likewise, no claims for defects as to quality may be derived from entrepreneurial risks – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action's merit.

7.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.

7.4 Claims for defects as to quality expire within one year from the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.

7.5 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

## 8. LEGAL DEFECTS

8.1 We are liable for products and services infringing on third party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.

8.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order.

8.3 In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third party rights, we shall choose one of the below actions, duly taking into consideration the customer's interests:

- procuring for the customer the right to use the service; or
- revising the service to render it free of legal violations.

8.4 Upon our request, the Customer shall assist us with the defense against third party claims according to this section 8, with each of the Parties bearing the costs of the use of its own personnel and counsel.

8.5 Claims the Customer may hold for legal defects expire in accordance with Section 7.4.

8.6 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

## 9. LIABILITY

9.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.

9.2 Besides Section 9.1, we are not liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health in cases of simple negligence and – subject to the limitations set forth hereinafter – due to damage caused by a breach of a material contractual obligation. Material contractual obligations are obligations that (i) you reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the outcome of performance.

9.3 In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, body or health – is limited to typical and at the time of the formation of this Contract foreseeable damage.

9.4 The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies', employees' and vicarious agents' personal liability.

9.5 Our liability for damages under warranties (Beschaffungsgarantien) is limited to instances in which the warranty expressly includes such liability.

9.6 Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 9.1 through 9.5.

## 10. CONFIDENTIALITY

10.1 The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:

- were already known or accessible to any third party at the time of disclosure;
  - which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information;
  - must be disclosed by order of and to a government agency or another competent third party; and
  - must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.
- In the cases of Sections b) and c) above, the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.

10.2 We may use your company name and logo as a reference so long as no contractual details are divulged.

## 11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

11.1 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, the place of payment is Hamburg, Germany.

11.2 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, all disputes arising from or in connection with any Contract between the Parties shall exclusively be resolved through the courts of Hamburg. Governing law is German law under exclusion of the CISG.