ASIA-PACIFIC B2C E-COMMERCE MARKET 2014

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## General Information

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### Questions Answered in This Report

- What is the current state and what are the prospects of B2C E-Commerce Asia-Pacific?  
- Which markets in the region are the most advanced and which are the fastest growing?  
- Who are the major players in the online retail in Asia-Pacific?  
- What are the key characteristics of the country B2C E-Commerce markets across the region?
Asia-Pacific region predicted to become the world’s largest B2C E-Commerce market

Asia-Pacific is the fastest growing region on the global B2C E-Commerce market. Between 2013 and 2018 it is forecasted to grow by over 20% annually and surpass North America to become the number one region worldwide in terms of B2C E-Commerce sales. The large population base coupled with increasing Internet connectivity and disposable incomes set the stage for this rapid growth.

The booming Asia-Pacific market is a field of activity for both regional and global players. The three largest companies based in the region are China-based Alibaba and JD.com and Japan’s Rakuten. While Alibaba and JD.com shine on the global stage through IPO offerings, Rakuten pursues customers around the globe by launching marketplaces beyond the home region. Among the global brands with the large shares in the region are Amazon, eBay and Yahoo.

China is the largest online shopping market in the Asia-Pacific region and second largest worldwide. The number of online shoppers, at over 300 million in 2013 continues to grow as Internet penetration continues. The hottest trends on the booming E-Commerce market in China are the development of mobile and social channels for online shopping, growing popularity of group-buying websites and the rise in purchases of luxury goods online.

The number two market in Asia-Pacific and number three worldwide in terms of online retail sales is Japan. Though the market is one of the most advanced, further growth of close to 10% is still expected, primarily from development of new channels, such as M-Commerce, whose share on total retail has reached double-digit figures.

South Korea is also among the B2C E-Commerce leaders. Online shoppers in this country are among the most experienced with online shopping, paying with credit cards online and having the goods delivered to the doorstep through courier services. Moreover, they are the trend-setters in mobile shopping, as the practice of shopping through messaging apps and scanning codes with smartphones at virtual stores were developed there and are spreading throughout the region and the world.

Another regional front-runner is Australia. Despite a smaller population compared to some of the huge nations in Asia-Pacific, Australia has one of the highest B2C E-Commerce sales rates, reaching a high one-digit percentage of total retail sales. Internet penetration is one of the highest in the region and over three quarters of Internet users make purchases online.

A rising star on the regional B2C E-Commerce scene is Indonesia. While the sales are still below 1% of the total retail market and two thirds of the population does not yet have Internet access, the prospects for growth are bright. The growth rate in 2013 was already one of the highest worldwide, and improving
Asia-Pacific region predicted to become the world’s largest B2C E-Commerce market

infrastructure, growing Internet and mobile penetration on the large population are expected to contribute to further sale’s surge.

B2C E-Commerce is growing fast in India also, with rates of above 50% and further strong growth projected for the next five years. Mobile commerce especially has great potential for development, as over 90% of Internet users access the web through mobile connections. More foreign players may invest into the market’s growth if the country’s government decides to ease the FDI restriction in the B2C E-Commerce sector.

Another B2C E-Commerce hopeful is Thailand. The country already shows top rates in mobile shopping: users actively adopt shopping options integrated in popular messaging apps, and actively buy and exchange goods through social networks. Meanwhile, its neighbor from the Southeast Asia, Malaysia, boasts one of the most developed infrastructures for online shopping and strong growth perspectives.
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Asia-Pacific B2C E-Commerce Market 2014

Samples

By 2018, Asia-Pacific is projected to surpass North America and become the number one region worldwide in terms of B2C E-Commerce sales.


B2C E-Commerce sales in Australia in 2013 were equivalent to XX% of sales in traditional brick and mortar stores, up from XX% in 2012.

Australia: B2C E-Commerce Market Size, in % of Traditional Retail Sales, 2012 & 2013
General Methodology of our Market Reports:

- This report includes the results of secondary market research: By using various sources we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- This report covers the B2C E-Commerce market. It takes into account a wide definition of B2C E-Commerce, and might include mobile commerce and social commerce.
- Cross referencing of data was conducted in order to ensure validity and reliability.
- Besides providing information on the specific topic, every chart contains an Action Title, which summarizes the main statement of the chart and a Sub Title, which gives information about the country, the topic, the unit or currency, and the time period the data on the chart refers to.
- Furthermore, the source of information and its release date are provided on every chart. It is possible that the information included in one chart is derived from several sources. Then, all sources are mentioned on the chart.
- This report also includes rankings. Within these rankings, it is possible that the total amount adds up to more than 100%. If this is the case, multiple answers were possible, and this is then mentioned in the note of the chart.
- If available, additional information about the data collection, for example the time of survey and number of people asked, 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 were mostly used. When referencing them 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.
- This report includes mainly data from the last 12 months. The exact publication dates are mentioned in every chart.

Methodology for our Asia-Pacific B2C E-Commerce Market report:

- This report contains a Management Summary, summarizing the main information provided in each chapter.
- A regional chapter follows, with countries in the relevant region being compared to other countries worldwide and among each other, in terms of B2C E-Commerce, Internet and mobile penetration and mobile shopping.
- A top country in the region by B2C E-Commerce sales growth opens the country chapters. Other countries follow in the alphabetical order.
- For each country, the following topics are covered: major trends in the B2C E-Commerce market, sales figures, shares of B2C E-Commerce sales on the total retail market, main product categories, and relevant information about Internet users and online shoppers. Furthermore, major players in the E-Commerce market were identified and presented. Data availability and scope varied by country. The information is presented in the order as described below.
- Each country starts with an overview of the B2C E-Commerce market and an international comparison, where the relevant country is compared to other countries in the region and worldwide in terms of B2C E-Commerce potential.
- The trend section includes an overview of trends on the B2C E-Commerce market, including M-Commerce, regulatory trends and cross-border.
- The section "Sales & Shares" includes the development of B2C E-Commerce sales and the share of B2C E-Commerce on the total retail market is shown.
- In the users / shoppers section, we included a review of the development of Internet users and share of online shoppers. Also more in-depth information about users is included, such as breakdown by age and gender, where available.
- Afterwards, the section "Products" shows the leading product categories purchased by online shoppers or related information.
- The payment and delivery section covers B2C E-Commerce delivery and payment methods, where available.
- Finally, the player section includes information about the leading E-Commerce players. Several rankings by various criteria were presented, with the top players highlighted.
### Frequently Asked Questions

**WHAT IS THE TARGET AUDIENCE FOR THE MARKET REPORTS?**  
The target group of our B2C E-Commerce reports are decision makers in top-management, for example from the departments E-Commerce, Business Development, Strategy, Marketing, etc. from large corporations worldwide.

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Asia-Pacific B2C E-Commerce Market 2014

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Selected References

Internet, Consulting, Retail, Finance and Other Companies

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- Google  
- Amazon  
- eBay  
- Avira  
- Skype  
- Digital River  
- First Data  
- Citrix Online  
- Wirecard  
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