EASTERN EUROPE B2C E-COMMERCE MARKET 2014

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Questions Answered in This Report

- How large are the online retail markets across Eastern Europe and how fast do they grow?
- Who are the major B2C E-Commerce competitors in top countries in this region?
- What are the main trends and characteristics of the B2C E-Commerce markets across the region?
Growth of Online Retail in Eastern Europe Attracts Global Investors

Eastern Europe accounted for a small one-digit share of the global B2C E-Commerce sales last year, dwarfed by the large double-digit shares of North America, Asia-Pacific and Western Europe. However, it terms of growth year over year, some of the nations of the region are among the global leaders.

The leading emerging markets in this region in terms of market size are Russia, Turkey and Poland. Russia and Turkey also scored high in year to year growth of B2C E-Commerce in 2013, but were outpaced by close to 50% growth in Ukraine. Some smaller markets, such as Estonia and Slovakia generate significantly smaller sales of a few hundred millions of euros, but outperform the rest of the region in terms of ICT infrastructure metrics, such as Internet penetration.

Among the important trends spreading throughout the region is the development of mobile shopping. M-Commerce is driven by growing smartphone and mobile Internet penetration. In countries such as Ukraine and Turkey over 40% of smartphone owners already have experience with mobile shopping. Another important movement is cross-border B2C E-Commerce. For example, in Slovenia and the Czech Republic close to half of all online shoppers made purchases from foreign online stores in 2013. Regulation of online retail sales is also a trend; the past two years were marked with adoption of important new rules affecting E-Commerce in several Eastern European countries including Russia and Belarus.

Looking at payment methods, the report finds that cash on delivery still predominates in the majority of B2C E-Commerce markets in the region, as it is the most used payment method in Russia, Greece, Czech Republic, Ukraine, Hungary, Romania, Slovakia and Belarus. However, for cross-border purchases, credit cards are often used. For example, in Romania, over 90% of online shoppers paid with cash in 2013, but international transactions account for more than half of the credit card payments made for goods and purchases online that year.

The fast growing markets of Eastern Europe have attracted the attention of international B2C E-Commerce players and investors. The region’s largest market, Russia, drew hundreds of millions of dollars in B2C E-Commerce investment over the past several years from companies such as JP Morgan, Kering, IFC, Tiger Global Management, Naspers and others. While on first stages the major beneficiaries were online clothing retailers such as Lamoda and KupiVIP, in 2014 the trend favored online shops of goods for children, such as Esky and Mamagazin. Also the second largest online retail market in the region, Turkey, has raised significant interest of international and local investors, mostly in the clothing sector featuring such players as Markafoni, Modanisa and Lidyana.
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Samples

By Internet penetration, Estonia was the leading country in Eastern Europe in 2013, while Russia has seen the greatest increase from 2009.

<table>
<thead>
<tr>
<th>Country</th>
<th>2009</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>73%</td>
<td>80%</td>
</tr>
<tr>
<td>Slovakia</td>
<td>70%</td>
<td>78%</td>
</tr>
<tr>
<td>Latvia</td>
<td>67%</td>
<td>75%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>64%</td>
<td>74%</td>
</tr>
<tr>
<td>Slovenia</td>
<td>64%</td>
<td>73%</td>
</tr>
<tr>
<td>Hungary</td>
<td>62%</td>
<td>73%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>60%</td>
<td>68%</td>
</tr>
<tr>
<td>Croatia</td>
<td>51%</td>
<td>67%</td>
</tr>
<tr>
<td>Poland</td>
<td>59%</td>
<td>63%</td>
</tr>
<tr>
<td>Russia</td>
<td>29%</td>
<td>61%</td>
</tr>
<tr>
<td>Greece</td>
<td>42%</td>
<td>60%</td>
</tr>
<tr>
<td>Belarus</td>
<td>27%</td>
<td>54%</td>
</tr>
<tr>
<td>Romania</td>
<td>37%</td>
<td>50%</td>
</tr>
<tr>
<td>Ukraine</td>
<td>18%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: YStats, 2014

Only 3% of online shoppers in the Czech Republic paid for their purchases via “Payment Systems” in 2013.

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>2013</th>
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</thead>
<tbody>
<tr>
<td>Cash on Delivery</td>
<td>47%</td>
</tr>
<tr>
<td>Bank Transfer</td>
<td>19%</td>
</tr>
<tr>
<td>Cards</td>
<td>14%</td>
</tr>
<tr>
<td>Payment at POS</td>
<td>14%</td>
</tr>
<tr>
<td>Payment Systems</td>
<td>3%</td>
</tr>
</tbody>
</table>

Note: data not add up to 100% due to multiple answers possible
Survey: based on a survey of online shoppers
Source: Shepard, Dissemination, November 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.
- 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 previous 12 months. The exact publication dates are mentioned in every chart.

Methodology for our Eastern Europe B2C E-Commerce Market report:

- This report contains a Management Summary, summarizing the main information provided in each chapter.
- A regional chapter follows, where the relevant region is compared to other regions worldwide and countries in the relevant region are compared to other countries worldwide and among each other, in terms of B2C E-Commerce, Internet, mobile and online shopping penetration.
- A top country in the region by B2C E-Commerce sales growth opens the country chapters. Other countries follow in the descending order of B2C E-Commerce sales.
- In the country sections, 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, delivery and payment methods, relevant information about Internet users and online shoppers and major players in the E-Commerce market were identified and presented. Data availability and scope varied by country. Not all countries have each of the mentioned sections covered due to varying data availability. The information is presented in the order as described below.
- The trend section includes information about trends on the B2C E-Commerce market, such as M-Commerce, regulatory trends and cross-border B2C E-Commerce trends.
- The section “Sales & Shares” includes the development of B2C E-Commerce sales and the share of B2C E-Commerce on the total retail market.
- 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 online shoppers 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.
- Finally, the player section includes information about the leading E-Commerce players. For the top countries also information about investment deals in the B2C E-Commerce sector was included.
## 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.

### What type of researchers are finding the information for our market reports?
yStats.com employs multilingual researchers that research and filter all sources and translate the relevant information into English. This ensures that the content of the original sources is correctly interpreted.

### Where can I see what kind of information is included in the market reports?
For every market report, a detailed Table of Contents is available, clearly stating what information is included. All Table of Contents can be found on our homepage and in the product brochures of the market reports.

### How do I order a market report?
If you would like to order, please fill out the report order from the market report included in the relevant product brochure. Afterwards, please sign it and send it back to us by fax or e-mail.

### How long does it take me to gain access to the report?
In general, potential clients gain access to the report within a few hours after sending out the report order form.

### Is it possible to purchase only selected parts from a market report?
In general, the market reports are only sold as a whole. However, if you are only interested in parts of the report, please contact us.

### 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. Moreover, tax has to be paid for all private purchases from non-EU countries do not have to pay tax. Moreover, tax has to be paid for all private purchases from the EU.

### What sources are used for the market reports?
The reports are all based on reliable sources including national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other sources.

### What type of analysts are writing the market reports?
After the information is researched, it is further analyzed by our international team of research analysts. These analysts have a long experience in the field of E-Commerce research, and they understand the specifications of the market.

### Is the information in the market reports comparable from country to country?
Due to the fact that the information included in the market reports is derived from different sources, some information is not comparable across countries. Different sources mostly have different definitions.

### In what format are the market reports delivered?
The market reports are delivered in PowerPoint and PDF format. If a different format is needed, please contact us before the purchase. It would also be possible to order printed versions of the reports for a slightly higher price.

### How can I pay for the market report?
An invoice issued by yStats.com can be paid either by bank transfer or by PayPal. Bank transfer usually takes a few working days, while with PayPal, the money is transferred immediately.

### How many employees of my company have access to the reports?
We offer different licensing options. Single User Licenses mean that only one user from an organization can access the report. A Site License, allowing all users within a given geographical location to access the report, is available for double the price. Global Site Licenses, allowing access to all worldwide users of an organization, are available for triple the price.

### Do you offer discounts?
If you are interested in purchasing several reports, please contact us. We will consider the possibility of bundle pricing.

### Is the information in the market reports comparable from country to country?
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### Regarding the timing, when will an update of a market report be published?
In general, the market reports are published on a yearly basis. For further information, please take a look at the report overview, which includes a list of the reports we plan to publish in 2014. If you would like to be informed as soon as the update is published, please inform us.

### I have a research request that cannot be answered through the market reports. Are there any further products?
If you require further information, we also offer "Customized Research" on all sectors and countries worldwide. After a detailed briefing, we conduct pre-research and provide potential customers with an offer.

### Do you offer an annual subscription of the market reports?
Yes. Our product "Full Access Global E-Commerce Reports" gives customers access to all our E-Commerce market reports. Furthermore, access to all the market reports we publish during the subscription period is guaranteed.
Eastern Europe B2C E-Commerce Market 2014

Quotes of our Customers

Travis Witteveen
Chief Operating Officer – Markets and Operations
Avira GmbH: Leading European Software Company

“As a company that operates on a global level, the research results that yStats.com provides represent significant added benefit for us. The comprehensive analyses are executed quickly and flexibly. Furthermore, they are a reliable resource for helping us to make strategic decisions.”

Iris Stöckl
Director Investor and Public Relations
Wirecard AG: Leading E-Banking Company

“The flexibility that yStats.com offers ensures that we always receive analyses, data and reports that match our needs. Fast, objective and to the point!”

Steve Rotter
Vice President of Marketing
Brightcove, Inc.: Leading Online Video Company

“yStats.com quickly and flexibly compiles the information we require. Regardless of whether we need local or transnational data, we always get the best results from yStats.com!”

Dr. Marcus Ackermann
Member of the Executive Board
Bonprix: Leading Online Shopping Company

“When we need the latest trends and statistics on the retail, homeshopping and e-commerce market, we turn to yStats.com. yStats.com turns the data into concise information that is objective and reliable. yStats.com delivers a cost-efficient and time saving research service for our company.”

Selected References

Internet, Consulting, Retail, Finance and Other Companies

Internet
- Google
- Amazon
- eBay
- Avira
- Skype
- Digital River
- First Data
- Citrix Online
- Wirecard
- 1 & 1
- Skrill / Moneybookers
- Deutsche Telekom
- CyberSource
- bwin Interactive Entertainment
- Brightcove

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

Retail
- OTTO Group
- Costco
- Tchibo Direct
- Diesel

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

Other
- Red Bull
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Eastern Europe B2C E-Commerce Market 2014

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3. Unless explicitly agreed upon otherwise in writing, the entirety of the “Contract”, as defined in 1.1, is binding for you and us. Terms and Conditions are subject to change at any time without prior notice, based on the discretion of yStats GmbH & Co. KG, the most current of which are readily available on our website.

We herewith contract 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 us and our customer (the “Customer”). Both we and the Customer agree to the following terms of this contract and the Contract:

2. REPORT AND FULL-ACCESS SUBSCRIPTION OFFERS & ORDERS
2.1 With respect to the purchase of our Market Reports, such terms can be made either online or offline.
2.2 Our homepages contain information about pricing, acceptable payment methods and product brochures. To purchase a Market Report direct 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, you must log into your account and select the Report on our Order Form from the appropriate online brochure or by clicking on the Fax Order button on our website. 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 complete Report Order Form, you will obtain an invoice detailing the purchased product, price, and date of payment. Upon successful processing of payment, thepreview during the subscription timeframe as identified in the “Order Form” as of the date of the execution of the Contract, and you may use these reports as a “Global Site License” in accordance with Section 5.3 below and the provisions of the Contract.

3. CUSTOM RESEARCH OFFERS & ORDERS
3.1 Unless explicitly 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 will submit an offer to you in the form of a “Research Order Form”. If you accept the proposal, and if 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 will have two options after 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 online orders are to be derived exclusively from the Order Form and/or the documents referenced 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 All prices are subject to change without notice. The subject shall pay any modifications, if any, that have been unilaterally made, has become unavailable or is ready for decision.
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 Invoices (for any subsequent contract year) will be sent to you upon commencement of each contract year.
4.5 All charges are due immediately on 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 use 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 legal ground of our claims. Retention of title set-off clauses, if applicable, have been unilaterally made, has become unavailable or is ready for decision.

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, excluding the text of this Contract and the Contract, are our property. You may not reproduce, publish, transmit, transfer or sell, recreate, create derivative works from, distribute, perform, display, or in any other manner distribute the products made available to 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 be expressly named as the author of any data the customer processes further as contractually negotiated.

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

5.4 You may use a product 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 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 products and services 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/or tolerable tramendous 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 defect.
7.3 Defect claims are further excluded in cases of excessive or improper use on in connection with the use of our products or if the defect is caused by extrastructural factors. In subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of the 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 injury, in cases of grossly negligent breach of contract or in cases of intent.
7.5 Claims for defects as to quality expire within three years from the receipt of the products and services or completion of the works on defect.
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 for the intended purpose.
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 provider’s usual place of business.
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 following actions, duly taking into consideration the customer’s interests:
8.4 If the customer is entitled to revocation of the contract, the customer shall have revocation of the contract, and the customer may use these reports as a “Global Site License” in accordance with Section 5.3 below and the provisions of the Contract.
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 In cases of slight negligence, we are liable to the extent of the damages we could potentially have foreseen. In cases of ordinary negligence, we are liable to the extent of the damages we could potentially have foreseen. In cases of ordinary negligence, we are liable to the extent of the damages we could potentially have foreseen. In cases of ordinary negligence, we are liable to the extent of the damages we could potentially have foreseen. In cases of ordinary negligence, we are liable to the extent of the damages we could potentially have foreseen.
9.3 In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, health – is limited to typical and at the time of the formation of this Contract foreseeable damage.
9.4 The aforementioned limitations also apply to our liability for fault by our bodies, employees and vicarious agents as well as for our bodies, employees and vicarious agents (personal liability).
9.5 Our liability for damages under warranties (Schaffensleistungsansprüche) 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 from 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:
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 (Gesondwermögen) under public law, the seat of payment is the city of Hamburg, Germany. Should any dispute arise, the courts of Hamburg shall have jurisdiction. In Contracts with merchants, legal persons under public law, or special assets (Gesondwermögen) under public law, the seat of payment is the city of Hamburg, Germany. Should any dispute arise, the courts of Hamburg shall have jurisdiction.