

GLOBAL CLOTHING B2C E-COMMERCE REPORT 2013

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Global Clothing B2C E-Commerce Report 2013

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Key Findings (1 of 2)

B2C E-Commerce sales of clothing are booming globally.

The recent „Global Clothing B2C E-Commerce Report 2013“ by Hamburg-based secondary market research company yStats.com provides information about online purchase of clothing. One of the findings of the yStats researchers is that this is the number one product purchased in B2C E-Commerce worldwide. The Internet has become an important tool for browsing or researching clothing products, whether the purchase is eventually made online or in a store. According to the report, over one-third of Internet users worldwide made or intended to make a purchase from this product category in 2013. The report details the trends in sales globally, by region, and country by country.

Online clothing and apparel shopping popular in Europe

Across Europe, clothing B2C E-Commerce is booming. In the EU, the share of individuals purchasing clothes and sports goods online increased in 2012, reaching over 20% of individuals. In Germany, apparel is the largest B2C E-Commerce category, having grown by just under a third in terms of sales and reaching several EUR billions of sales. Among the leading players on the market, the Otto Group plans to launch a new E-Commerce fashion project named Collins in 2014, while Zalando more than doubled its B2C E-Commerce clothing sales in 2012.



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Key Findings (2 of 2)

B2C E-Commerce sales of clothing are booming globally.

close to a half of the adult population shops online for clothing. Asos and Debenhams were among the most prominent online shops for fashion products in the UK in early 2013. In France, nearly a half of Internet users shopped for clothing online in 2012, with La Redoute and 3 Suisses being the most popular destinations for shopping.

The clothing and apparel sector is expanding in Eastern Europe as well. In Russia, B2C E-Commerce sales of clothing and shoes grew by over +40% in 2012, and accounted for almost one fifth of total B2C E-Commerce sales. Clothing, shoes and accessories became the most popular online product category in 2012, with nearly half of online shoppers making purchases. Online clothing retailers in Russia have seen significant increase in revenues, some growing by up to 6 times, with Wildberries, Lamoda, Quelle and KupiVip as leading online merchants. Several players, such as KupiVip and Lamoda, attracted large investments from local venture capitalists and from abroad. Clothing and shoes is the leading B2C E-Commerce category in Poland, with a high double-digit percentage of online shoppers making purchases. The number of online shops selling clothes in Poland grows rapidly every year. In Estonia, Croatia, Macedonia and Turkey and some other European countries, clothing was bought by a high percentage of online shoppers, and was one of the most popular online product categories in these countries.

Clothing sector making gains in the Americas

In the United States, apparel and accessories was second to consumer electronics in terms of B2C E-Commerce sales. This category is expected to grow by a double digit percentage figure in 2013, with the growth continuing, but slowing down throughout 2016. Nevertheless clothing is expected to remain the fastest growing product category in B2C E-Commerce. Players such as Abercrombie & Fitch compete to increase their share of the booming US E-Commerce market for clothing. In Latin America, clothing ranks high in popularity for online shoppers in such countries as Peru, Uruguay and Venezuela, but is outperformed by electronics. In Brazil, apparel is the fourth most popular online product category, purchased by around a third of online shoppers in 2012. In Mexico this share is less than in Brazil, as apparel falls behind computers, electronics, books and some other products and services.

Varying levels of clothing sector popularity in Asian-Pacific nations

Clothing is the most purchased product category in B2C E-Commerce in Japan. The globally active apparel retailer Gap Inc opened an online shop in Japan last fall, joining other national and international players. In South Korea, clothing was the among the highest selling categories in 2012, growing at a one-digit percentage rate, which is slightly slower than the total B2C E-Commerce market, signaling high maturity. In China, fashion and accessories had the highest reach of online shoppers, amounting to three quarters of female and a high double-digit share of male online shoppers.

E-Commerce sales of apparel increased by over a half to several tens of EUR billion in 2012. Although C2C remains the largest segment of the online market for clothing in China, the market share of independent B2C platforms grows, with large international players, such as Levi Strauss, Inditex, Macy's and Asos launching or planning to launch local online shops. In Australia, clothing was the second most purchased product category in B2C E-Commerce after electronics in 2012 and is expected to remain the fastest growing product category in the B2C E-Commerce through the next five years.

Growing investment in online clothing outlets in the Middle East and Africa

In the Middle East and Africa, local online fashion stores attract large investments from established capitalists, indicating a positive view of the market potential. The Middle Eastern online vendor of clothing, Namshi, a Rocket Internet's project, raised several USD millions of investment in May 2013, while a South African online apparel store Zando received an even larger sum from investors such as JP Morgan. Moreover, in South Africa, the discount sector started to emerge on the online market for clothing, with apparel discount online shopping clubs, such as Runway[Sale], launched in 2012, growing rapidly.



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Samples

SAMPLE OUTPUT: STATISTIC

RESEARCH ON INTERNATIONAL MARKETS
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International Trends Sales Shares Products **Users / Shoppers** Players

The number of mobile Internet users in Japan is estimated to increase to 93 million in 2016, up from 66 million in 2012.

Japan: Mobile Internet Users, in millions and in % of Country Population, 2010-2016f

Year	Number of Mobile Internet Users (millions)	Percentage of Country Population
2010	55	44%
2011	60	47%
2012f	66	52%
2013f	74	58%
2014f	80	63%
2015f	87	69%
2016f	93	74%

Definition: mobile phone users of any age, who access the Internet from a mobile browser or an installed application at least once per month; excludes SMS, MMS, IM
Source: to be mentioned in the report

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SAMPLE OUTPUT: COMPANY PROFILE

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We deliver the facts – you make the decisions

International Trends Sales Shares Products Users / Shoppers **Players**

In Q3 2012, multi-channel mass merchant Magazine Luiza generated 12% of its total revenues through online sales.

Brazil: Profile of Magazine Luiza

Name of Company	Magazine Luiza S.A.
Headquarters	Franca, Sao Paulo, Brazil
Major Online Shop	www.magazineluiza.com.br
Company Type	Multi-Channel Retailer
Product Range	Mass Merchant
Financial Data	<ul style="list-style-type: none"> Consolidated gross revenue of BRL 2.2 billion in Q3 2012, up by +15.2% from Q3 2011 Online sales of BRL 269 million in Q3 2012, up by +25.0% from Q3 2011
E-Commerce related News	<ul style="list-style-type: none"> Magazine Luiza launched its improved online shop in November 2012, which aims at ensuring customer responsiveness through close contact. On the new website, product categories are organized by color and stores. Furthermore, customers receive recommendations based on their knowing and purchasing behavior. The new website also features higher browser and mobile device compatibility and claims to be faster than any other E-Commerce site in Brazil. In November 2012, Magazine Luiza diversified its online offering by opening a virtual florist. Besides buying flowers for specific categories such as birthdays and apologies, customers can order add-ons such as chocolates and books to go with the flowers. In Q3 2012, online sales accounted for 12% of total revenues of Magazine Luiza.

Source: to be mentioned in the report

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SAMPLE OUTPUT: RANKING

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International Trends Sales Shares Products **Users / Shoppers** Players

Morocco (49%) was the African country with the highest Internet penetration in December 2011, followed by the Seychelles and Tunisia.

Africa: Top Internet Countries, Rank 1-10, by Internet Penetration, in % of Population, December 2011

Country	Internet Penetration (%)
Morocco	49.0%
Seychelles	38.0%
Tunisia	36.3%
Reunion (FR)	36.0%
Nigeria	29.0%
Cape Verde	28.8%
Egypt	26.4%
Kenya	25.5%
Mauritius	24.8%
Sao Tome & Principe	17.3%

Source: to be mentioned in the report

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SAMPLE OUTPUT: TRENDS

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International Trends Sales Shares Products Users / Shoppers **Players**

French online travel revenue (+16%) grew stronger between January and September 2011 than French B2C E-Commerce revenue (+12%).

France: Online Travel Trends, 2011

- Between January and September 2011, online travel revenue in France increased by +16%, which is a stronger growth than that of B2C E-Commerce as a whole (+12%). Growth in French online travel was mainly driven by Voyages-sncf.com, as reported by L'Echo Touristique.
- In Q1 2011, travel sales had increased by +12% and +20% in Q2, followed by a growth of +15% in Q3 2011, despite the financial crisis and the Arab Spring. In total 2011, online travel sales in France amounted to EUR 12 billion, up from EUR 10.7 billion in 2010.
- The Internet was very popular among French travelers in 2011. 59% of them gather information online before booking a trip. 56% of French travelers bought travel services online, while 22% exclusively purchased their travel services online, according to Foris.
- The average travel-related online shopping basket was EUR 291 in France, three times higher than the average E-Commerce basket in the country.
- 35% of French online travel shoppers bought train tickets and 23% booked tickets for other transportation services. A further 31% also made online reservations for hotels and other accommodations, while 20% used the Internet to find rental services.
- Furthermore, "Travel and Holiday Accommodation" was the leading sector in French B2C E-Commerce in 2011, reaching higher sales than the next four top sectors combined.
- After Malaysia, France was the market with the second highest growth in reach of airlines category, reaching 12.2% growth in February 2011.

Source: to be mentioned in the report

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Global Clothing B2C E-Commerce Report 2013

Methodology

This B2C E-Commerce Report by yStats.com is produced in a holistic approach to contain relevant information about recent market trends, sales figures, shares, shoppers, and players news on the global B2C E-Commerce market for clothing.

- 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. B2B E-Commerce and C2C E-Commerce are not included, unless stated otherwise.
- 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.
- The included data was mainly published in the last 12 months. The exact publication dates are mentioned in every chart.
- The report opens with a Management Summary, summarizing the main information provided in each chapter.
- This report is divided into sections by regions. First, information about global development of the market is given, then in the each regional section the information about market in the region as a whole is provided, where available. The selected top countries in the respective regions are then presented, and the remaining countries follow in the alphabetical order.





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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 form for the market report included in the relevant product brochure. Afterwards, please sign it and send it back to us by fax or by 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.

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.

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.

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 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.

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.

IS THE REPORT SENT TO ME BY E-MAIL?

In general, we provide customers with access to our website. After logging in, the customer can download the report as PowerPoint and PDF files.

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 into the report order form. Customers from non-EU countries do not have to pay tax. Moreover, tax has to be paid for all private purchases from the EU.

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 2013. 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 DISCOUNTS?

Yes. "Report Bundle" offers 5 reports of your choice for only EUR 8,900. This means that you can save more than 50%. Furthermore, another option offers a discount of 5% if the customer buys 1 report, and 20% if the customer buys 2 reports. If 3 reports are purchased, a discount of 30% is offered.



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REPORT ORDER FORM

PLACE YOUR ORDER OFFLINE

- Scan and email this form to 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"/>
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_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		TOTAL			

CHOOSE YOUR PAYMENT METHOD

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.

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.

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.

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

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 up to 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.

HOW DID YOU FIND US?

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



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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 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 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 (Beschaffheitsgarantien) 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.