SINGAPORE B2C E-COMMERCE MARKET 2015
GENERAL INFORMATION

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QUESTIONS ANSWERED IN THIS REPORT
How does Singapore compare to other markets in Southeast Asia in criteria related to B2C E-Commerce?
How large is the online retail market in Singapore and what are its current trends?
Which payment method is most used by online shoppers in this country?
What product categories are leading in online retail in Singapore?
Which local and international E-Commerce players are prominent?

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SINGAPORE LIKELY TO CONCEDE ITS RANK AS THE LEADING B2C E-COMMERCE MARKET IN SOUTHEAST ASIA

Singapore has the most advanced infrastructure in Southeast Asia. Its transport and payment systems are well developed, Internet penetration is high and its overall business environment is considered to be the best in the world. Due to these factors and the fact that consumers in Singapore are lured by convenience of online shopping, Singapore ranked highest in Southeast Asia in B2C E-Commerce sales two years ago, despite the comparatively small population of only 5.5 million.

The online retail market in Singapore is considered to be relatively advanced, with online shopper penetration of over 50% of Internet users and the online share of total retail being the highest in its sub-region. While more vastly populated neighbors only start to develop B2C E-Commerce capabilities and thus are likely to see rapid growth rates in the next few years, Singapore is projected to lose its leading position in B2C E-Commerce sales volume to other countries in Southeast Asia, such as Indonesia.

Some important online retail trends in Singapore include cross-border online shopping and the evolution of omnichannel retail. Around two thirds of online shoppers in Singapore made cross-border purchases at least once per year, as of early 2015. Foreign merchants such as Amazon.com, eBay.com and Alibaba Group’s marketplaces are among the most visited E-Commerce websites in Singapore. Omnichannel retail is also gaining importance, as consumers increasingly use mobile devices to shop, research products online and buy them in-store or do it the other way around. The latter trend encouraged Singapore-based online clothing retailer Zalora to open a pop-up store in October 2014.

Other prominent players include Giosis, which operates online marketplace Qoo10, the most popular online shopping destination in Singapore, as of July 2015. Giosis raised a multi-million dollar investment in the summer of 2015 and so did online grocery retailer RedMart. Meanwhile, Singapore Post received investment from Alibaba Group and continued to expand its E-Commerce capabilities.
# SINGAPORE B2C E-COMMERCE MARKET 2015

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In Singapore, “Appealing Offer” (42%) was the main reason for making online purchases cross-border in April 2015.

Singapore: Reasons to Purchase Online from a Foreign Country, in % of Cross-Border Online Shoppers, April 2015

Note: does not add up to 100% due to multiple answers possible
Survey: based on a survey of around 1,000 Internet users (accessing via computer, tablet or smartphone), conducted in the period November 2014 to April 2015. Base of respondents to this question were internet users who ever purchased a product/service online from abroad
Source: Google TNS, August 2015

In October 2014, 72% of online shoppers in Singapore believed that free shipping was critical in the online purchase decision.

Singapore: Share of Online Shoppers Who Believe that Free Shipping is Critical in Online Purchase Decision, in %, October 2014

Survey: based on a survey of over 5,200 online shoppers in China, Hong Kong, Japan, South Korea and Singapore, conducted between September and October 2014
Source: UPS, ComScore cited by Marketing Interactive, March 2015
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METHODODOLOGY OF OUR SINGAPORE B2C E-COMMERCE MARKET 2015 REPORT

- In this country report, major trends in the B2C E-Commerce market, sales figures, B2C E-Commerce share of the total retail market, main online product categories, and relevant information about Internet users, online shoppers and leading E-Commerce companies were included.
- The report starts with an overview of the B2C E-Commerce market and international comparisons, where the relevant country is compared to other countries worldwide and in the region in terms of criteria relevant to B2C E-Commerce.
- The “Trends” section includes an overview of trends on the B2C E-Commerce market, such as social commerce, cross-border and M-Commerce trends.
- The section “Sales & Shares” includes the development of B2C and total E-Commerce sales, including historical sales and forecasts. Furthermore, this section shows the development of B2C E-Commerce share of the total retail market.
- In the “Users & Shoppers” section, a review of the development of Internet users and Internet penetration was included. Moreover, the evolution of the online shopper penetration was shown.
- Afterwards, the section “Products” shows the leading product categories among online shoppers.
- The next two sections, “Payment” and “Delivery”, cover information related to delivery and payment methods most used by online shoppers.
- Finally, the “Players” section includes information about the leading E-Commerce players, such as online retailers and marketplaces.
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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 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 true also in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and result of a given defect.

7.4 Claims for defects as to quality expire within one year from the commencement of the legal statute of limitations. 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 injury 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 arrangements.

8.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the Federal Republic of Germany and the Federal Republic of Austria as well as the place of the service provider as agreed under the applicable Order.

8.3 In the event that third parties assert 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:

a) arranging with the customer for the customer to bear the service costs;

b) revising the service to render it free of legal violations.

8.4 Upon request, the Customer shall defend us with our 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 against 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 We shall not be liable for any damages, regardless of their nature to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims to the extent that we are to be held liable to damage to body, health or 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 which are essentially required upon execution of the applicable Order Form and (b) was of critical significance to the outcomes to performance.

9.3 In case of a negligent breach of a material contractual obligation our liability for damages - except for damages in which there is also a claim for the performance of a service - is limited to the foreseeable and contractually typical damage.

9.4 The aforementioned limitations 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 (Besicherungsverhältnisse) 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, it being forbidden to disclose or otherwise transfer, publish, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way make available the products made available by us, in whole or in part, except as expressly permitted under the Contract.

10.2 We, as well as any original sources contained within our material, must expressly be named as the author of any data the customer processes further as commercially negotiated.

11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

11.1 In Contracts with merchants, legal persons under public law, or special assets (Körperschaften) under public law, the place of payment is Hamburg. If a merchant is not classified in Hamburg, the place of payment is the domicile of the merchant.

11.2 In Contracts with merchants, legal persons under public law, or special assets (Körperschaften) under public law, all disputes arising out of or in connection with this Contract shall be concluded in the Hamburg Commercial Court or, if such Court lacks jurisdiction, in the Commercial Court of Hamburg. Any dispute shall be exclusively resolved through the courts of Hamburg. Governing law is German law under exclusion of the CISG.

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