

AFRICA B2C E-COMMERCE MARKET 2015

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General Information

Product Details

Language:	English
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Prices

Single User License:	€ 1,750 (excl. VAT)	€ 950 (excl. VAT)
Site License:	€ 2,625 (excl. VAT)	€ 1,425 (excl. VAT)
Global Site License:	€ 3,500 (excl. VAT)	€ 1,900 (excl. VAT)

Questions Answered in This Report

- What is the current state and the prospects of B2C E-Commerce in Africa?
- How do countries in Africa compare among themselves and other countries worldwide by various indicators relevant for B2C E-Commerce?
- How does the infrastructure necessary for evolvement of online retail develop across various countries in this region?
- What are the major B2C E-Commerce markets in Africa?
- Who are the key competitors in online shopping in Africa?



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Key Findings

B2C E-Commerce in Africa to reach a double-digit number in EUR billion

Africa is considered a late entrant to the global E-Commerce stage. Low internet penetration, underdeveloped logistics and limited cashless payments infrastructure, as well as low incomes and high poverty rates have hindered the uptake of online shopping in this region. However, recent signs of improvements have led to forecasts of B2C E-Commerce sales growing at high rates to a double-digit number in EUR billions in the next three years.

South Africa and Nigeria are the continent's leaders in online retail development. While South Africa has been in view for years as an important emerging market, Nigeria is a rising star. As the region's most populous country, it already surpassed South Africa in economy size and topped all other African nations by number of Internet users and mobile phone owners. Local online merchants Jumia and Konga are among the country's most popular websites. Jumia has already expanded beyond Nigeria to other markets in the region, while both companies received substantial investment to fortify their positions on the domestic market, as the launch of PayPal in Nigeria in 2014 is expected to bring more international competition.

Still, South Africa is significantly ahead of all other countries in the continent by such important infrastructure indicators as Internet, smartphone and payment card penetration. An important development in South Africa is the declining share of online spending on foreign websites. Fear of hidden charges and the convenience of buying from local merchants are cited as major reasons for not buying cross-border. Nevertheless, US-based global merchant Amazon ranks among the most visited E-Commerce websites in the country, while the two largest South African online merchants Kalahari.com and Takealot.com decided to merge to join their forces against increasing local and international competition. Overall, South African B2C E-Commerce market potential is still largely untapped, as online accounted for only slightly more than 1% of total retail sales last year.

Looking at other African nations, Morocco and Egypt are Africa's most advanced markets in Internet penetration, which reached more than half of the population in these countries, as of 2014. Online shopper penetration stood at below 10% in these countries, though especially in Morocco, the number of users buying over the Internet has grown significantly. In Egypt, a particular characteristic is significance of the social network Facebook, which not only generates traffic for online merchants such as Souq.com and Jumia, but also is cited by online shoppers as a website for direct placement of orders.

Kenya is Africa's leader in all aspects of mobile: mobile connections account for almost all of Internet subscriptions in the country, while the number of people using mobile payment services has been growing each year to reach a significant double-digit number in 2014. Still, the country's E-Commerce market is smaller than that of some other African countries, through by mobile shopper penetration it topped them all, ranking first in this parameter together with Nigeria.



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Samples

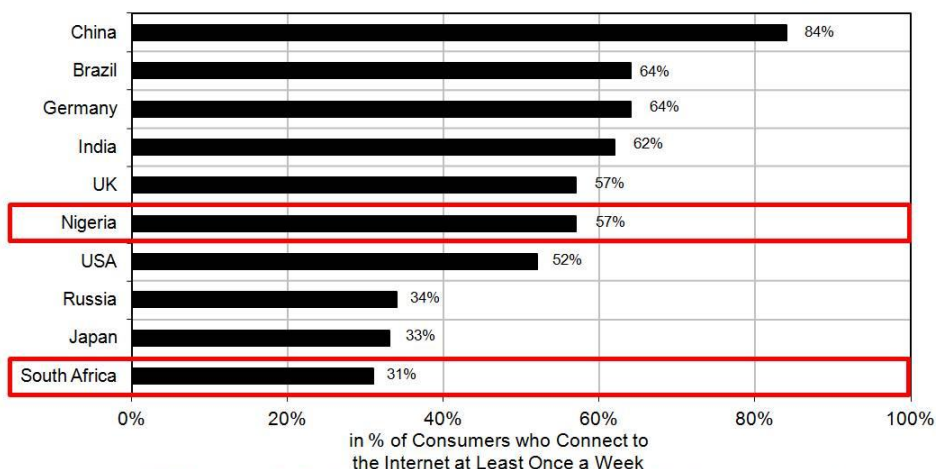


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In Nigeria, 57% of connected consumers preferred to shop online, while in South Africa only 31%, below other countries worldwide in July 2014.

Global: Share of Consumers who Prefer to Shop Online, in % of Consumers who Connect to the Internet at Least Once a Week, by Selected Countries, incl. South Africa and Nigeria, July 2014



Survey: based on a survey of 10,000 consumers in the USA, UK, Germany, Japan, Brazil, Russia, China, India, South Africa, Nigeria, who connect to the Internet at least once a week and often more; 1,007 respondents were from Brazil; ages 16+

Source: AT Kearney, November 2014

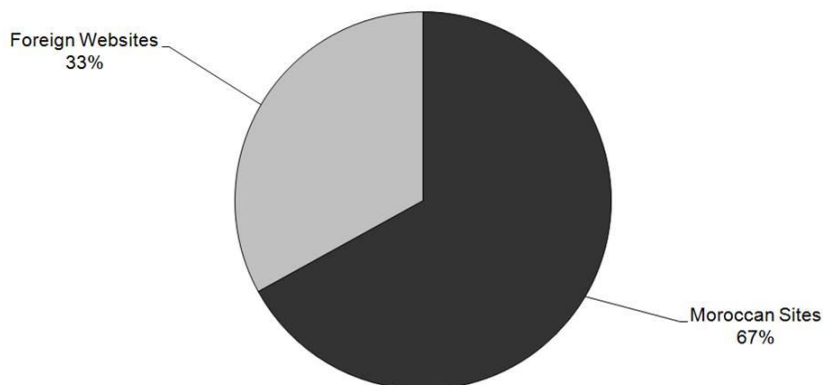


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In Morocco, 67% of online shoppers purchased from local websites, while 33% shopped on foreign websites in 2013.

Morocco: Breakdown Online Shopping Destination, in % of Online Shoppers, by Moroccan Websites and Foreign Websites, 2013



Definition: Internet users who used the Internet to purchase or order online (usage of online travel services was a separate category, reaching 7% in 2013)
Survey: based on a survey of individuals and households, conducted in Q1 of 2012, 2013 and 2014; ages 12-65; in 2014, the number of individuals and households participating in the survey amounted to 1,823

Source: Agence Nationale de Reglementation des Telecommunications (ANRT), June 2014



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Methodology

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.
- The 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.
- This report contains a Management Summary, summarizing the main information provided in each chapter.
- 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.
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- 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 previous year was used.
- This report includes mainly data from the last 12 months. The exact publication dates are mentioned in every chart.

Methodology for our Africa B2C E-Commerce Market report:

- This report opens with a global comparisons chapter where the region and its countries are compared to other regions and countries worldwide, in terms of B2C E-Commerce indicators, such as sales share, Internet and mobile penetration and others.
- A regional chapter follows, where regional B2C E-Commerce sales are presented and countries in the region are compared among themselves by relevant indicators.
- A top country in the region by B2C E-Commerce sales, South Africa, opens the country chapters. For this country, major trends in the B2C E-Commerce market, sales figures, shares of B2C E-Commerce sales on the total retail market, main online product categories, relevant information about Internet users and online shoppers, as well as payment and delivery methods was included. Furthermore, major players in the B2C E-Commerce market were identified and presented in rankings and a text chart containing qualitative information and important news.
- Other countries follow in the descending order of B2C E-Commerce sales. Where no sales data was available, other relevant indicators, such as Internet penetration and online shopper penetration were used to rank the countries. The information included per country differed in scope due to varying data availability. Nigeria, Egypt and Morocco are covered in a larger scope than Senegal and Kenya. Where available, market trends, transaction volumes, Internet and online shopper penetration, as well as relevant information about players was presented. Algeria and Rwanda have the smallest coverage due to limited data availability.



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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?

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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
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- OTTO Group
- Costco
- Tchibo Direct
- Diesel

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

Other

- Red Bull
- BASF
- Lego
- Beiersdorf
- Xerox



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Selected Published Reports

Report	Publication Date	Price (excl. VAT)*
Sub-Saharan Africa B2C E-Commerce Market 2015	February 2015	€ 750**
North Africa B2C E-Commerce Market 2015	February 2015	€ 450
South Africa B2C E-Commerce Market 2015	February 2015	€ 450**
Nigeria B2C E-Commerce Market 2015	February 2015	€ 450
Global Clothing B2C E-Commerce Market 2015	January 2015	€ 1,950**
Brazil B2C E-Commerce Market 2014	December 2014	€ 750**
Latin America B2C E-Commerce Market 2014	December 2014	€ 1,450**
Eastern Europe B2C E-Commerce Market 2014	October 2014	€ 950**
Russia B2C E-Commerce Market 2014	October 2014	€ 450**
Global B2C E-Commerce Market 2014	October 2014	€ 2,950**
Australia & New Zealand B2C E-Commerce Market 2014	August 2014	€ 950**
Asia-Pacific B2C E-Commerce Market 2014	August 2014	€ 2,950**
South East Asia B2C E-Commerce Market 2014	July 2014	€ 1,950**
India B2C E-Commerce Market 2014	July 2014	€ 450**
Malaysia B2C E-Commerce Market 2014	July 2014	€ 450**
China B2C E-Commerce Market 2014	June 2014	€ 450**
Indonesia B2C E-Commerce Market 2014	June 2014	€ 450**
Vietnam B2C E-Commerce Market 2014	June 2014	€ 450**
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Global Online Payment Methods: Second Half 2014	December 2014	€ 1,450**
Global Online Payment Methods: First Half 2014	May 2014	€ 950**
Global B2C E-Commerce Delivery 2014	May 2014	€ 1,950**
Global Cross-Border B2C E-Commerce 2014	April 2014	€ 1,950**
Global Online Gaming Market 2014	February 2014	€ 950**

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Future Reports

Report	Planned Date	Price (excl. VAT)
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 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 _____



Africa B2C E-Commerce Market 2015

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:

a) procuring for the customer the right to use the service; or
b) 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 (Beschaffenheitsgarantien) 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:

a) were already known or accessible to any third party at the time of disclosure;
b) which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information;
c) must be disclosed by order of and to a government agency or another competent third party; and
d) 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.