INDONESIA B2C E-COMMERCE MARKET 2017
GENERAL INFORMATION

PRODUCT DETAILS
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Covered Countries: Indonesia
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QUESTIONS ANSWERED IN THIS REPORT
What was the size of the E-Commerce market in Indonesia in 2016?
What are the online retail sales growth forecasts for Indonesia through 2025?
How many people in Indonesia made purchases online in 2016?
What are the leading product categories bought online in Indonesia?
Who are the main E-Commerce market players in this country?

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INDONESIA IS THE FASTEST GROWING E-COMMERCE MARKET IN SOUTHEAST ASIA

E-Commerce in Indonesia is nascent, but developing fast. This report from yStats.com reveals that despite ranking low on Internet and online retail penetration rates, Indonesia’s E-Commerce market is already the largest in the region, owing to its large population size. The spread of Internet penetration, mobile connectivity, favorable demographics and economic growth are among the factors contributing to online retail development in this country, while infrastructure needs to be improved in order for the market to live up to its full potential.

The number of Internet users in Indonesia has been growing exponentially, with some statistics cited in yStats.com’s report ranking this country number one worldwide by Internet usage growth pace. Consumers are embracing mobile connected technology first: smartphones were the top devices to access the Internet and make purchases online in 2016. Another important trend is the strength of social commerce, with more than 50% of Internet users surveyed in 2016 recognizing Facebook as a platform not only to socialize, but also to buy and sell goods.

Multiple projections cited in this report by yStats.com convey expectation of strong double-digit growth rate of E-Commerce sales in Indonesia over the next several years, outpacing other markets in this emerging region. The burgeoning market opportunity has helped some of the top E-Commerce market players in Indonesia such as Lazada, Tokopedia, Elevania and MatahariMall to attract significant amounts of investment over the past several years and competition has intensified.
INDONESIA B2C E-COMMERCE MARKET 2017

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“Clothes/accessories” was the leading product category purchased by 55% of online shoppers in Indonesia, as of August 2016.

### Indonesia: Product Categories Purchased Online, in % of Online Shoppers, August 2016

<table>
<thead>
<tr>
<th>Product Category</th>
<th>% of Online Shoppers</th>
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<tbody>
<tr>
<td>Clothes/Accessories</td>
<td>21%</td>
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<tr>
<td>Mobile Phones/Tablets</td>
<td>22%</td>
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<tr>
<td>Cosmetics</td>
<td>22%</td>
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<tr>
<td>Personal Care</td>
<td>22%</td>
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<tr>
<td>Food and Beverage</td>
<td>18%</td>
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<tr>
<td>Home Appliances</td>
<td>18%</td>
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<tr>
<td>High Technology Products</td>
<td>13%</td>
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<tr>
<td>Computer/Laptop</td>
<td>11%</td>
</tr>
<tr>
<td>Sports/Leisure Equipment</td>
<td>11%</td>
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<tr>
<td>Travel</td>
<td>9%</td>
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<tr>
<td>Books, eBooks</td>
<td>8%</td>
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<tr>
<td>Beauty Services</td>
<td>6%</td>
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<tr>
<td>Furniture</td>
<td>6%</td>
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<tr>
<td>Car, motor</td>
<td>5%</td>
</tr>
<tr>
<td>Others</td>
<td>5%</td>
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Note: does not add up to 100% due to multiple answers possible.

Survey: based on a survey of 1,285 respondents, conducted online nationwide from 1st to 30th of August 2016. Question asked: “What did you buy online this month?” The base of respondents to the question were 1,285 online shoppers.

Source: ID McDougall, September 2016

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By 2025, the E-Commerce share of total retail sales of selected physical product categories in Indonesia is projected to reach 8%.

### Indonesia: E-Commerce Share of Total Retail Sales, in %, 2015 & 2025

<table>
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<tr>
<th>Year</th>
<th>E-Commerce Share</th>
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<tr>
<td>2015</td>
<td>0.6%</td>
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<tr>
<td>2025</td>
<td>8.0%</td>
</tr>
</tbody>
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Definition: E-Commerce defined as online spending on electronics, apparel/clothing, household goods, and food/grocery.

Source: Google and Temasek, May 2016
GENERAL METHODOLOGY OF OUR MARKET REPORTS

Secondary Market Research
- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
  - Cross referencing of data is conducted in order to ensure validity and reliability.
  - The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
  - The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

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METHODOLOGY OF OUR INDONESIA B2C E-COMMERCE MARKET 2017

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- This report covers the retail E-Commerce market in Indonesia. A broad definition of retail E-Commerce used by some original sources cited in this report might include both B2C and C2C E-Commerce.
  - The report contains relevant information about international comparisons, market trends, E-Commerce sales and shares, Internet users and shoppers, products, payment methods, delivery and players..

Report Structure
- The report starts with an overview of the E-Commerce market and international comparisons, where the relevant country is compared to other countries in the region in terms of criteria relevant to retail E-Commerce, such as sales, Internet and online shopper penetration.
  - Next, the “Trends” section includes an overview of market trends, such as M-Commerce and social commerce.
  - The section “Sales & Shares” covers the development of retail E-Commerce sales and E-Commerce’s share of total retail sales.
  - In the “Users & Shoppers” section, information about Internet penetration and online shoppers is included.
  - Afterwards, the section “Products” shows the leading product categories purchased online.
  - The next section, “Payment”, covers the payment methods most used by online shoppers.
  - Furthermore, the “Delivery” section covers information related to delivery in online shopping.
  - Finally, the “Players” section includes information about the leading E-Commerce companies, including rankings of top online shopping platforms by website visits, awareness and usage rates by online shoppers.
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<td>Asia-Pacific Online Payment Methods: Full Year 2016</td>
<td>March 2017</td>
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<td>Asia-Pacific Cross-Border B2c E-Commerce 2017</td>
<td>February 2017</td>
<td>€ 1,950</td>
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<td>Asia-Pacific Online Travel Market 2016</td>
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<td>China B2C E-Commerce Sales Forecasts: 2016 to 2020</td>
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<td>Europe B2C E-Commerce Market 2016</td>
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<td>Southeast Asia B2C E-Commerce Market 2017</td>
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TOTAL

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Choose your Preferred Payment Method:

Credit Card
- VISA
- MasterCard
- American Express
- China UnionPay

Bank Transfer
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.

CARD HOLDER
CARD NUMBER
EXP. DATE
SECURITY CODE**

**If you prefer, this can be communicated over the phone or via secured e-mail communication.

COMPLETE YOUR CONTACT DETAILS
An invoice will be sent to your company

<table>
<thead>
<tr>
<th>TITLE</th>
<th>FIRST NAME, LAST NAME</th>
<th>JOB TITLE</th>
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<td>STATE/PROVINCE</td>
<td>POSTAL CODE</td>
<td>COUNTRY</td>
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HOW DID YOU FIND US?
- Search Engine (Google, Bing etc.)
- Print/Online Publication
- Press Release
- LinkedIn/XING
- Facebook/Twitter
- Personal Recommendation
- Other

SIGNATURE

EU COMPANIES
MUST SUPPLY VAT NO.
PURCHASE ORDER NO. (IF REQUIRED)
ORDER DATE

* 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.