# PHILIPPINES B2C E-COMMERCE MARKET 2017

## GENERAL INFORMATION

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### QUESTIONS ANSWERED IN THIS REPORT

- What was the B2C E-Commerce market size in the Philippines in 2016?
- How fast is online retail in the Philippines projected to grow through 2025?
- What are the main trends influencing the B2C E-Commerce development in this country?
- Which product categories are purchased online in the Philippines the most?
- Who are the B2C E-Commerce market leaders in the Philippines?

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PHILIPPINE E-COMMERCE TO OUTPACE MOST REGIONAL PEERS BY 2025

B2C E-Commerce in the Philippines is nascent, with less than 1% of total retail sales generated online. Rising Internet and smartphone penetration rates, however, are stimulating the market's growth, predicted to be the second highest among the top six economies in Southeast Asia. Currently ranking last by B2C E-Commerce market size, the Philippines is projected to overtake Singapore, Vietnam and Malaysia, coming in third in the region by 2025, according to the sources cited in yStats.com's publication.

With Internet penetration rising, there are still major challenges preventing E-Commerce in the Philippines from reaching its full potential. These include a poor logistics infrastructure coupled with the multi-island nation's complex geography, as well as lack of consumers' trust in online credit card payments which results in a high share of cash on delivery. According to a recent survey referenced in this report by yStats.com, close to three-quarters of online shoppers in the Philippines paid in cash upon the receipt of goods.

The Philippine E-Commerce competition landscape is dominated by Lazada, a Southeast Asian E-Commerce champion controlled by the Alibaba Group. Third-party sources estimated Lazada's share of the country's fast growing online retail market at nearly one-fifth in 2016, as revealed in yStats.com's report. Another major competitor is online fashion retailer Zalora Philippines, a 49% stake in which was recently acquired by Ayala Corporation. Furthermore, while having no local E-Commerce presence, US-based Amazon is nevertheless a major market influencer, with more than 50% of online shoppers starting their online product search on Amazon.
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PHILIPPINES B2C E-COMMERCE MARKET 2017
REPORT-SPECIFIC SAMPLE CHARTS

The number of smartphone users in the Philippines is projected to increase from 27.5 million in 2016 to 38.4 million in 2020.

**Philippines: Smartphone Users, in millions, and Penetration, in % of Mobile Phone Users, 2014 – 2020f**

- **Smartphone Users**
- **Penetration**

**Sources:**
- **Definition:** includes any person who used a smartphone at least once a day.
- **Sample size:** April 2014.

The B2C E-Commerce’s share of total retail sales in Philippines is expected to increase from 0.5% in 2015 to 4.7% in 2025.

**Philippines: B2C E-Commerce Share of Total Retail Sales, in %, 2015 & 2025f**

- **B2C E-Commerce**
- **Other**

**Sources:**
- **Definition:** B2C E-commerce defined as online spending on electronic apparel/clothing, household goods, and food/drink, including the sale of "new goods" only through a website or a mobile app, or online in physical stores.
- **Source:** Data and research, May 2015.
PHILIPPINES B2C E-COMMERCE MARKET 2017

METHODOLOGY

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.

Definitions
- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.

Chart Types
- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Subtitle, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.

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- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.

Notes and Currency Values
- If available, additional information about the data collection, for example the time of survey and number of people surveyed, 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.
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Report Coverage
- This report covers the retail E-Commerce market in the Philippines.
- It includes 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 cross-border online shopping.
- 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, “Delivery”, covers information related to delivery in online shopping.
- Furthermore, the “Payment” section covers the payment methods most used by online shoppers.
- 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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- Costco
- Tchibo Direct
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**TOTAL**

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  - VISA □
  - American Express □
- MasterCard □
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**CARD HOLDER**
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<td>FAX</td>
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<td>STATE/PROVINCE</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**

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.*
TERMS AND CONDITIONS

1. yStats GmbH & Co KG provides its services exclusively to contracting partners and users of its website according to Sec. 14 German Online-Ordner ("SOE") subject to the following Terms and Conditions. By visiting our website, downloading any of the provided by yStats GmbH & Co KG or paying for our services or if directly or indirectly, accessing or using our services and the content of the services between yStats GmbH & Co KG and you. 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 version of which is readily available on our website.

We reserve the right to terminate any terms and conditions and to deny access to our customers which will not become part of the Order Form.

2. SCOPE

2.1. The following terms and conditions apply to our entire contract (the "Contract") between yStats GmbH & Co KG and you for the provision of our services, unless otherwise agreed upon by both our representatives and in writing, limited to the case of custom research orders, at which point the provisions of the Order Form shall prevail.

2.2. REPORT AND FULL ACCESS SUBSCRIPTION OFFERS & ORDERS

2.2.1. All reports, purchases, and orders can be made either online or offline.

2.2.2. 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 provided. If payment is successful, you will receive an invoice via email and the Report will be available online for download.

2.2.3. To purchase a Market Report offline or offline, please send your request to info@ystats.com or go to the site where you will be informed of the price, and payment details will be provided via an invoice. Upon successful processing of your request, payment, and order, you will be issued with an invoice and the Report will be mailed to you within 10 working days. The products and services are provided "as is" and without warranty of any kind, express or implied, including without limitation any implied warranty of merchantability or fitness for a particular purpose.

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 5.2 below and the provisions of the Contract.

2.5. To purchase one of our Full Access Subscriptions, please contact us through the appropriate forum on our website. The full access subscription can be used on your devices and includes access to all of our reports. To purchase a Full Access Subscription, please order it via the above forum. Upon successful processing of your request, payment, and order, you will be issued with an invoice and the Full Access Subscription will be made available to you within 10 working days.

2.6. If you order our "Full Access Subscriptions", you gain access to all reports within the scope of your chosen timeframe. The full access subscription can be used on your devices and includes access to all of our reports. To purchase a Full Access Subscription, please order it via the above forum. Upon successful processing of your request, payment, and order, you will be issued with an invoice and the Full Access Subscription will be made available to you within 10 working days.

3. CUSTOM RESEARCH OFFERS & ORDERS

3.1. Unless expressly prohibited 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 any information acquired through an inquiry, we may offer 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 performed, the time expected for the delivery, the structure of payment, and the total fee. These terms shall govern the 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 & CONDITIONS

4.1. All prices for online offers are to be derived exclusively from the Order Form and/or the documents referred 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 time the Order Form is filled out and signed by a duly authorized representative, once this Order Form has been completed and signed, please send the Order Form back to us in email with PDF attachment. Upon receipt of the completed Order Form including an invoice detailing the price of the full Access Subscription and payment of that price, our customer will be issued with an invoice and the Full Access Subscription will be made available to you within 10 working days.

4.3. All prices for online offers are to be derived exclusively from the Order Form and/or the documents referred therein. Upon receipt of the completed Order Form including an invoice detailing the price of the full Access Subscription and payment of that price, our customer will be issued with an invoice and the Full Access Subscription will be made available to you within 10 working days.

4.4. All payments shall be due and payable immediately upon the date stated 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.

4.5. All prices are subject to change at any time without prior notice. Based on the discretion of yStats GmbH & Co KG, the most current version of which is readily available on our website. We reserve the right to terminate any terms and conditions and to deny access to our customers which will not become part of the Order Form.

4.6. All rights to the customer's design shall be surrendered to us at any time. All data that are part of our property is to be removed from the data carrier if the customer's design is not used or returned to us.

4.7. All prices for online offers are to be derived exclusively from the Order Form and/or the documents referred therein. All prices for orders placed via the online shop are those which are displayed on our website.

4.8. All prices are net and without transportation costs. If applicable, Value Added Tax, if applicable, at the time the Order Form is filled out and signed by a duly authorized representative, once this Order Form has been completed and signed, please send the Order Form back to us in email with PDF attachment. Upon receipt of the completed Order Form including an invoice detailing the price of the full Access Subscription and payment of that price, our customer will be issued with an invoice and the Full Access Subscription will be made available to you within 10 working days.

4.9. All prices for online offers are to be derived exclusively from the Order Form and/or the documents referred therein. Upon receipt of the completed Order Form including an invoice detailing the price of the full Access Subscription and payment of that price, our customer will be issued with an invoice and the Full Access Subscription will be made available to you within 10 working days.

4.10. All prices for online offers are to be derived exclusively from the Order Form and/or the documents referred therein. All prices for orders placed via the online shop are those which are displayed on our website.

4.11. All prices are net and without transportation costs. If applicable, Value Added Tax, if applicable, at the time the Order Form is filled out and signed by a duly authorized representative, once this Order Form has been completed and signed, please send the Order Form back to us in email with PDF attachment. Upon receipt of the completed Order Form including an invoice detailing the price of the full Access Subscription and payment of that price, our customer will be issued with an invoice and the Full Access Subscription will be made available to you within 10 working days.