SOUTHEAST ASIA B2C E-COMMERCE MARKET 2018

PUBLICATION DATE: MAY 2018

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SOUTHEAST ASIA B2C E-COMMERCE MARKET 2018

GENERAL INFORMATION

PRODUCT DETAILS

Title: Southeast Asia B2C E-Commerce Market 2018 Report
Type of Product: B2C E-Commerce
Category: Southeast Asia
Covered Regions: Indonesia, Thailand, Singapore, Vietnam, Malaysia, Philippines

Language: English
Formats: PDF & PowerPoint
Number of Charts: 165

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QUESTIONS ANSWERED IN THIS REPORT

What is the projected size of the B2C E-Commerce market in Southeast Asia by 2025?
Which countries in the region have the highest potential for online retail sales growth?
What are the top product categories purchased online in Southeast Asia?
How do Southeast Asia's online shoppers prefer to pay for their digital purchases?
Who are the leading E-Commerce market players in Southeast Asia?

SECONDARY MARKET RESEARCH

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B2C E-COMMERCE SALES IN SOUTHEAST ASIA TO GROW EIGHT-FOLD BY 2025

The online shopping sector is in early stages of development in most Southeast Asian nations, accounting for a small single-digit share of total retail sales. However, the yStats.com report shows that this region harbors tremendous potential for expansion of B2C E-Commerce, with a projection of an eight-fold increase in online sales between 2017 and 2025. With a total of over half a billion people living the six countries covered in the report, higher Internet and online shopper penetration rates are bound to result in robust E-Commerce growth. In Indonesia alone, Internet access is expected to nearly double by 2025, strengthening its position as the region's largest online retail market.

The top reasons why connected consumers in Southeast Asia are increasingly adopting online shopping include the convenience of this method, allowing to shop at any time, along with the opportunity to compare prices and read product reviews, according to a recent survey included in the yStats.com report. Electronics, fashion and beauty products are among the most popular categories purchased online in countries including Thailand, Vietnam and Singapore. On the other hand, low levels of consumer trust and high delivery fees are cited among the main barriers to more digital purchases. In order to address these challenges, national governments, such as in Malaysia, pursue initiatives aimed at boosting infrastructure development and enhancing the regulatory framework for E-Commerce.

Online marketplace is becoming a major mode of conducting E-Commerce in Southeast Asia, although accepting orders through social media channels is still very popular, especially in Vietnam, Indonesia, Thailand and the Philippines. Singapore-based Lazada has emerged as the top online retailer and marketplace in the region, backed by support and investment from Alibaba Group, its main stakeholder. Other international E-Commerce leaders, including JD.com and Amazon are also taking interest in the region, challenging local pure-play and omnichannel retailers for a share of these fast growing B2C E-Commerce markets.
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23.2% of Internet users in Malaysia made purchases online in 2017, increasing from 16.1% in 2015.
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“Fashion” (44%) was the top product category purchased by online shoppers in Thailand, according to a survey from July 2017.
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Note: Figures may not add up to 100% due to multiple answers possible.
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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.

Report Structure
- 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.
- When providing information about amounts of money, local currencies are most often used. When referencing currency values 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.

REPORT STRUCTURE

Report Coverage
- This report covers the B2C E-Commerce market in Southeast Asia. The following countries were included: Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam. 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, B2C E-Commerce sales and shares, Internet users and shoppers, products, payment methods, delivery and players.

Next, the “Trends” section includes an overview of market trends, such as M-Commerce and cross-border online shopping. This information was not available for each of the covered countries.
- The section “Sales & Shares” covers the development of retail B2C 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, where available.
- Afterwards, the section “Products” shows the leading product categories purchased online. For some of the covered countries this information was not available.
- The next section, “Payment”, covers the payment methods most used by online shoppers, where available.
- Furthermore, the “Delivery” section covers information related to delivery in B2C E-Commerce. This information was not available for each of the covered countries.
- Finally, the “Players” section includes information about the leading B2C E-Commerce companies, including rankings of top online shopping platforms by website visits, where available. For the top two countries, also a text chart with a qualitative overview of competition was included.
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DR. MARCUS ACKERMANN
MEMBER OF THE EXECUTIVE BOARD
BONPRIX: LEADING ONLINE SHOPPING COMPANY

“When we need the latest trends and statistics on the retail, homeshopping and e-commerce market, we turn to yStats.com. yStats.com turns the data into concise information that is objective and reliable. yStats.com delivers a cost-efficient and time saving research service for our company.”

SELECTED CLIENTS

INTERNET
- Google
- Amazon
- eBay
- Skype
- Newegg
- Avira
- Digital River
- First Data
- Deutsche Telekom
- 1&1
- Brightcove

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

CONSULTING
- Boston Consulting Group
- Deloitte
- Bain & Company
- Accenture

RETAIL
- OTTO Group
- Amway
- Costco
- Tchibo Direct
- Diesel

OTHER
- Nintendo
- Bwin
- Lego
- Redbull
- BASF
- Beiersdorf
FREQUENTLY ASKED QUESTIONS

ABOUT US

- Why use yStats.com?
yStats.com can be your provider of the most current B2C E-Commerce data. Whether you seek country-specific, topic-specific, regional or global information, we ensure through secondary market research maximum objectivity for all data obtained. With our boardroom-ready PowerPoint presentations you save time and money.

- What are the benefits of secondary market research?
Secondary research is a not only a cost-effective alternative to conducting primary research studies, but it is also a time-efficient solution. Our researchers derive information and data from a variety of reliable published sources and compile the data into understandable and easy-to-use formats.

- Does yStats.com provide consulting services?
No, we do not provide consulting services in any form.

OUR PRODUCTS

- What types of Products does yStats.com offer?
yStats.com offers individual market reports and full access subscriptions (varying in license types and duration) to current and future published reports. The currently available reports can be found in the Market Reports section of our website. The list of soon-to-be-published reports can be found in the Upcoming Reports Section on our homepage. For a more extensive list of upcoming reports, please contact us directly. For more information about our Full Access subscription, please see the Full Access page on our website. Apart from market reports and subscription, yStats.com also offers custom research services.

- What is your research methodology?
Our reports are exclusively based on secondary market research. Our researchers derive information and data from a variety of previously published, reliable sources and compile the data into understandable and easy-to-use formats.

- From which sources is information for reports derived?
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 data obtained.

- Is information in the reports comparable across countries?
Due to the fact that information included in the market reports is derived from different sources which might rely on different definitions, some information might not be comparable across countries.

- What are the report format options?
Our reports are published in PDF and PowerPoint formats. PowerPoints are ready-to-use for boardroom presentations, but also easily editable to suit your business needs.

- Does yStats.com offer reports in other languages?
All of our reports are published in English at this time.

- How can I find the most relevant report?
On our website, you can use various search features or search by keyword. You can also contact us directly describing your research needs and we will help you find the appropriate report that satisfies them.

- How do I know which license to choose when purchasing individual reports?
When purchasing a report, you must select the appropriate license. A Single User License: allows one user to access the downloaded report. A Site License: allows up to ten (10) users of a company within a specified geographic area (i.e. country) to access the downloaded report. A Global Site License: allows up to ten (10) users of a company worldwide to access the downloaded report. Please choose the appropriate license with care, as all purchases are subject to our Terms & Conditions.

- Can I purchase only selected parts of a report?
Unfortunately, our market reports are only sold as a whole.

- Is there an overlap between country, regional and global reports on the same topic?
Some reports can have overlapping content, such as regional reports containing content from parts of individual country reports. Please consult the Table of Contents or contact us if any questions should arise.

- I would like to see a sample of a report. Where can I find it?
Free sample charts from each report can be viewed in the product brochure. Also a standard free sample is available for download from each report page. To get an idea what our reports look like you can download a standard Free Full Report from our online shop.

For a full version of Frequently Asked Questions, please visit: https://www.ystats.com/faq-by-section/
FREQUENTLY ASKED QUESTIONS

OUR PRODUCTS (CONT.)

- When will an update of a particular report be published?
In general, our market reports are published on an annual basis. Online Payment reports are updated on a semiannual basis. Please consult the "Upcoming Reports" section on our homepage or "Related Reports" section of our product brochure. We have a publication schedule that we adhere to, so if you’d like to know about a specific report, please contact us.

- Do you offer subscriptions to reports?
Yes, we do have a number of subscription options called “Full Access”. Some leading international enterprises subscribe to our reports to get the most comprehensive insight into B2C E-Commerce and online payment markets worldwide contained in our market reports collection and ensure cost efficiency. There are several Full Access subscription options varying in number of possible seats allocated and duration of subscription. For more information on our various Full Access Subscription offers, see our Full Access Subscription page on our website and contact us.

OUR SERVICES

- I need more information about a particular topic. Do you offer further products or services?
Apart from market reports, we also offer Custom Research. With our Custom Research solutions, you receive research tailored to your needs, answering your specific questions. The Custom Research types include In-Depth Industry Research, Competitive Intelligence and Company Profiles, Corporate Customer Identification in international markets, Investor Snapshots and Country Fact Sheets.

- I still need help finding the right report - do you offer additional personal search?
yStats.com offers services in which our researchers who prepare the reports can point you to the appropriate report to suit your needs. If you want to take advantage of this free service, please contact us.

ORDERING & DELIVERY

- How do I order a report?
Our reports can be purchased most easily through our Online Shop, but are also available for purchase offline. To purchase a report from our Online Shop: Choose the relevant report and appropriate license, click „Add to Cart”, then complete the necessary check out steps. Payment options include major credit cards (MasterCard, Visa, American Express, Maestro, China UnionPay) or PayPal. Once your online payment has been completed, you will be able to click on „Download”, which will take you to your “my yStats” account, from where your report will be available as a PDF and PPT for download.

To purchase a report via fax or email with PDF attachment:
To order a report offline, please complete and sign the “Fax Order” form, which can be located on the right-hand side of the webpage next to the report overview or in the product brochure. Send the completed and signed order form through fax or email (as a PDF attachment) as indicated on the form. An Invoice will be sent to you afterwards asking for payment via bank transfer, credit card, or PayPal. After the payment is processed successfully, you will be given the access details to the report.

- Will I get an invoice?
For online shop purchases, an invoice will be sent to you automatically via email to the email address entered in the billing details immediately after completion of payment. For offline orders, an invoice is sent per email after the complete order form is received.

- How long does delivery take?
All of our reports are delivered online. All reports ordered online via our Online Shop are available for download immediately following successful processing of payment. For all orders made offline, upon successful processing of payment, access details will be sent via email.

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

- What is yStats.com’s VAT number?
yStats.com’s VAT number is DE 251661218

POLICIES

- What is yStats.com’s return/refund/cancellation policy?
Since our reports are information-based digital products and therefore consumed upon purchase/download, we will not refund, allow cancellation or accept any returns of orders. Please read through all information about a product before purchasing. If you should have any questions about a product, please do not hesitate to contact us via our contact details as listed on our homepage.

For a full version of Frequently Asked Questions, please visit: https://www.ystats.com/faq-by-section/
**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:

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**TOTAL**

**CHOOSE YOUR PAYMENT METHOD**

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.

**COMPLETE YOUR CONTACT DETAILS**

An invoice will be sent to your company

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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. Scope

1.1 The following terms and conditions apply to our entire contract (the “Contract”) between yStats GmbH & Co KG (hereafter, “yStats”) and the customer(s) (hereinafter referred to as the “Customer”), provided by yStats GmbH & Co KG, for the delivery of data products, reports, subscriptions, and services, you acknowledge that you are bound by the following Terms and Conditions, which are a complete and binding agreement 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, theat may correct some of which are reasonably available on our website.

We herewith contradict any terms and conditions of purchase by our customers which will not become part of the Contract.

2. Report and Full-Access Subscription offer and orders

2.1 Unless otherwise agreed upon in writing, all reports, subscriptions, or products may 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 continue to Checkout. Where registration and payment is possible to be performed in full as payment on delivery 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 or offline via the exchange shops simply print it from your browser. A customer who wishes to receive the Report from the appropriate online brokers 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 yStats GmbH & Co KG or via fax or email. Upon receipt of the completed Report Order Form, you will be invoiced and delivery details will be notified to the purchaser via email or fax. The purchase price together with the delivery costs will be charged to the Customer’s credit card.

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 all 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. Our full access subscription is not available via our login. 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 to us by email with PDF attachment. Upon receipt of the completed Order Form, you will be invoiced and delivery details of the full price “Full Access Subscription” and payment in full is required. Upon successful processing of payment, access and login details will be forwarded to the purchaser via email.

2.6 The payment for your purchase is due immediately. If the payment is not received, the subscription will be terminated. Access to the purchased subscription shall only be available if you have paid the full payment for the subscription. You will be notified by email of the termination of the subscription whether you have paid the subscription fee by credit card, or other means of payment.

2.7 Your order is void if you do not accept delivery of the subscription within the subscription timeframe as identified in the “Order Form” as of the date of the execution of the Contract, and you may not benefit from any of your chosen license option, in accordance with Section 5.2 below and all other provisions of the Contract.

3. Custom research offers and orders

3.1 Unless expressly agreed upon in writing, the content of our offers may not be made available in whole or in part to any third party without our authorization.

3.2 With regard to any inquiry upon request, we may offer to you an offer to purchase 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 required for performance of the work, the total fee, the terms, and conditions of payment. We reserve the right to charge a fee to you for the services, in accordance with 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. Payment terms

4.1 All prices for offers are to be derived exclusively from the Order Form and/or the documents referred therein. All prices for offers placed via the online shop are those which are displayed on our website. In addition to all and without limitations, if applicable, Value Added Tax, if applicable, at the time of order, you will be invoiced including the value added tax of all the full price “Full Access Subscription” and payment in full is required. Upon successful processing of payment, access and login details will be forwarded to the purchaser via email.

4.2 No claims for defects as to its quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use. No claims for defects as to its quality are to be derived from entrepreneurial purposes – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to derive a commercially wise decision.

4.3 Default-based claims are at first 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 in the situation from which the customers or third persons are not able to be expected the analysis and removal of a given defect.

4.4 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 gross negligent breach of duties on the part of us, fraudulent concealment of a defect and injury to life, bodily health.

4.5 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

5. Liability

5.1 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.

5.2 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 service provider’s proper use as agreed in the present Contract.

5.3 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 a third party’s rights, we will take all of the below actions, at the customer’s request, at customer’s expense, with or without the customer’s prior acknowledgement of the contractual obligations, which are obligations (1) if you reasonably relied upon at execution of the applicable Order Form and (2) was of critical significance to the outcome of performance.

5.4 In case of a breach of a material contractual obligation our liability for damages – except for damage to life, bodily health or death – is limited to the statutory or the at the time of the formation of this Contract foreseeable damage.

5.5 The aforementioned limitations also apply to our liability for fault by our bodies, employes and vicarious agents as well as our bodies, employed and vicarious agents’ personal liability.

5.6 Our liability for damages, under warranty (Begriffswidrigkeit etc.) is limited to insurances in which the warranty expressly includes such liability.

5.7 Claims for the reimbursement of expenses paid and other liability claims asserted by the customer against us are subject to Sections 6.1 through 6.5.

6. Confidentiality

6.1 The Parties shall hold in strictest confidence for a period of 5 years of the formation of this Contract regarding all data and information materials 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:

a) already known or accessible to any third party of the time of disclosure;

b) that have been disclosed to you by a third party or subject to a confidentiality obligation regarding this data or information;

6.2 Must be disclosed by order of and to a government agency or another competent third party, and

6.3 The Parties may make use of counsel, legal or technical experts, provided that each Party is legally or contractually bound to keep the data confidential, and provided that such disclosure of confidential information will not impair the confidentiality of the data.

7.1 The customer name and logo in a reference so long as no contractual details are disclosed.

8. Jurisdiction, Governing Law, MISCELLANEOUS

8.1 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 by the courts of Hamburg. German law under exclusion of the CISG.