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ONLINE RETAIL IN EMERGING MARKETS 2018
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QUESTIONS ANSWERED IN THIS REPORT
- What are the top emerging B2C E-Commerce markets worldwide?
- How fast are online retail sales growing in the emerging economies?
- What is the projection for B2C E-Commerce market size in BRICs by 2025?
- How do the preferences of online shoppers vary across the emerging markets?
- Which factors need to be taken into account when expanding to the fast growing E-Commerce markets such as in Southeast Asia?

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Global online retail sales are rising at double-digit rates, with the emerging markets across Asia, Eastern Europe, Latin America, the Middle East and Africa growing even faster. According to one forecast cited in the yStats.com report, the global regions dominated by emerging economies see significantly higher growth rates in B2C E-Commerce revenues than the established online markets in North America and Western Europe.

The four leading emerging markets by online retail growth potential are China, India, Russia and Brazil, together projected to generate more than USD 2 trillion of E-Commerce sales by 2025. Other growth champions covered in the yStats.com report include the countries of Southeast Asia, Mexico, Turkey, Egypt and others. In many of these and other emerging economies the online retail market is in early stages of development, accounting for only a small single-digit percentage of overall retail sales, signaling room for further growth. China is the one exception with already a double-digit share of retail transacted online.

The world's largest E-Commerce companies, Amazon and Alibaba, intensify their efforts to tap into the fast-growing online retail market in emerging economies. Amazon acquired the Middle East's leading E-Commerce platform Souq.com in 2017, while Alibaba directed its investments into Southeast Asia. Multiple local players also benefit from the E-Commerce boom in emerging markets, such as Flipkart in India, Wildberries in Russia, and MercadoLibre in Latin America.
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A quarter (24.9%) of Turkey’s population between 16 and 74 years old made online purchases in 2017, compared to 20.9% in 2016.

**Turkey: Online Shopper Penetration, in % of Individuals, 2016 & 2017**

- 2016: Online Shoppers 29.9%
- 2017: Online Shoppers 24.9%

**Definitions:**
- Internet users aged 16-74 who purchased goods or services over the internet for private purposes
- Based on a survey of households and individuals aged 16-74, conducted in Q3 of each year

**Source:** Turkish Statistical Institute, August 2017

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“Fashion” (44%) was the top product category purchased by online shoppers in Thailand, according to a survey from July 2017.

**Thailand: Product Categories Purchased in E-Commerce, in % of Online Shoppers, July 2017**

- Fashion: 44%
- Health and Beauty: 30.7%
- IT Equipment: 29.6%
- Home Appliances: 18.8%
- Order Food Online: 18.7%
- Travel, Tourism Services: 17.9%
- Paid Content: 15.9%
- Entertainment: 12.4%
- Consumer Goods: 11.2%
- Jewelry: 5.4%
- Financial, investment services: 8.2%

**Note:**
- Does not add up to 100% due to multiple answers possible
- Based on a survey of 21,101 respondents aged 16-74, conducted in June - July 2017

**Source:** yStats.com, September 2017
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.

METHODOLOGY OF OUR ONLINE RETAIL IN EMERGING MARKETS 2018

Report Coverage
- This report covers the global B2C E-Commerce (online retail) market with a focus on emerging markets. It includes relevant information about global market developments and trends, international comparisons, as well as about B2C E-Commerce sales and shares, trends, Internet users and shoppers, products, payment methods, delivery and players in major emerging B2C E-Commerce markets worldwide. A broad definition of retail E-Commerce used by some original sources cited in this report might include both B2C and C2C E-Commerce.
- All global regions with emerging markets are covered in this report, including Africa, Asia-Pacific, Easter Europe, Latin America, and the Middle East. Western Europe and North America were not included in this report due to mainly comprising advanced markets.

Report Structure
- The global chapter opens the report, including an overview of global market developments, trends, and regional and country comparisons that concern criteria related to B2C E-Commerce, such as B2C E-Commerce sales, Internet and online shopper penetration.
- The rest of the report is divided by regions. The regions are presented in the order of descending B2C E-Commerce sales. The countries within the regional chapters are also presented in the order of descending B2C E-Commerce sales. Where no comparable B2C E-Commerce sales data was available, the related criteria, such as online shopper penetration, Internet penetration and population size were considered.
- Each country description starts with an overview of the market, highlighting the overall B2C E-Commerce development in that country.
- Next, the “Trends” section includes an overview of market trends, such as M-Commerce, social commerce, and cross-border online shopping.
- The section “Sales & Shares” covers the development of retail B2C E-Commerce sales and E-Commerce’s share of total retail sales. Where available, information from several sources was provided for cross-referencing.
- 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 B2C E-Commerce.
- Finally, the “Players” section includes information about the leading E-Commerce companies, such as rankings of top online shopping platforms by market shares, website visits, awareness and usage rates by online shoppers, where available.
ONLINE RETAIL IN EMERGING MARKETS 2018
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