TURKEY B2C E-COMMERCE MARKET 2018

GENERAL INFORMATION

PRODUCT DETAILS

Title: Turkey B2C E-Commerce Market 2018
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Covered Countries: Turkey

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Number of Charts: 66

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QUESTIONS ANSWERED IN THIS REPORT

How fast was B2C E-Commerce growing in Turkey in 2017 and what is the projection for 2018?
What are the main online retail trends in Turkey?
Which are the preferred product categories and payment methods of Turkey's online shoppers?
What are the top E-Commerce websites in Turkey in 2018?
Which payment methods have the highest acceptance in Turkey's B2C E-Commerce?

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TURKISH B2C E-COMMERCE MARKET SHOWS SIGNS OF RAPID GROWTH

The B2C E-Commerce market in Turkey is emerging, demonstrating double-digit growth rates through 2018. Although less than 5% of the country's total retail sales are online, more growth is expected, driven by mobile shopping and social commerce trends. More than 50% of digital buyers in Turkey made purchases through mobile devices in 2017 and around one in two placed orders through social media, mainly through Instagram and Facebook. Clothes were the most popular items bought online, followed by household goods in distant second, according to online shopping statistics cited in the yStats.com report.

In terms of Internet and online shopper penetration rates, Turkey lags behind other countries in Europe, but also demonstrates improvement compared to the previous years. Around two-thirds of the population used the Internet and close to one-quarter of the population had made purchases online as of 2017. The main barriers to shopping online include preference for buying in-store and concerns over the security of online payments, according to a survey cited by yStats.com. The report also reveals the leading payment methods accepted by online stores of the top 100 retailers in Turkey.

The competition in the Turkish online retail market intensifies amidst the news of Alibaba's acquisition of local E-Commerce company Trendyol and Amazon's potential market entry in 2018. As of last year, the leading B2C E-Commerce market players were online pure-players Hepsiburada and N11, although multichannel retail was also gaining traction, with sales rising by one percentage point faster than in the pure-play segment.
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- Share of Top 100 Retailers With an Online Shop, in %, July 2018

APPENDIX: ONLINE PAYMENT METHODS ACCEPTED BY TOP 100 RETAILERS
- Payment Methods Accepted in Online Shops of the Top 100 Retailers in Turkey, incl. Company Name, 2016 Retail Sales and Rank, Online Shop Website, and Product Range, July 2018
Online shoppers in Turkey preferred to browse products via mobile (62.3%) but made online purchases via desktop (67%) in 2017.

**Turkey: Breakdown of Page Views and Orders in Online Stores, by Desktop and Mobile, in %, 2017**

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<thead>
<tr>
<th>Desktop</th>
<th>Mobile</th>
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<tr>
<td>37.7%</td>
<td>62.3%</td>
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**Orders**

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<tr>
<th>Desktop</th>
<th>Mobile</th>
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<td>67%</td>
<td>33%</td>
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**Note:**
- Based on over 3 million orders from online retailers in Turkey in 2017.
- The percentage shares in page views and orders are calculated from the number of page views reported by the source and the number of orders via web reported as 196,945,282 and via mobile as 108,278,571.
- Source: yStats.com, May 2018

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“Clothes, sports goods” (62.3%) was the product category most purchased by online shoppers in Turkey in 2017.

**Turkey: Product Categories Purchased Online, in % of Online Shoppers, 2016 & 2017**

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<thead>
<tr>
<th>Product Category</th>
<th>2016</th>
<th>2017</th>
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<tbody>
<tr>
<td>Clothes, sports goods</td>
<td>60.0%</td>
<td>62.3%</td>
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<tr>
<td>Household goods (e.g. furniture, toys, etc.)</td>
<td>26.4%</td>
<td>26.3%</td>
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<tr>
<td>Travel arrangements (e.g. transport tickets, car rent, etc.)</td>
<td>35.7%</td>
<td>34.1%</td>
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<tr>
<td>Food or groceries</td>
<td>18.0%</td>
<td>21.9%</td>
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<tr>
<td>Electronics equipment (incl. cameras)</td>
<td>21.7%</td>
<td>19.0%</td>
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<tr>
<td>Books, newspapers, newspapers (including ebooks)</td>
<td>19.4%</td>
<td>16.8%</td>
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<tr>
<td>Holiday accommodations (hotel, etc.)</td>
<td>16.0%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Travel in events</td>
<td>14.7%</td>
<td>12.8%</td>
</tr>
<tr>
<td>Computer hardware</td>
<td>11.4%</td>
<td>11.0%</td>
</tr>
<tr>
<td>Telecommunication services (e.g. TV, broadband subscriptions, fixed line or mobile phone)</td>
<td>12.4%</td>
<td>12.3%</td>
</tr>
<tr>
<td>Films, videos</td>
<td>0.8%</td>
<td>5.4%</td>
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<tr>
<td>Video game software and other computer software and upgrades</td>
<td>0.1%</td>
<td>0.3%</td>
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<tr>
<td>Music</td>
<td>3.9%</td>
<td>4.3%</td>
</tr>
<tr>
<td>E-learning material</td>
<td>3.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Other</td>
<td>0.6%</td>
<td>0.3%</td>
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**Note:**
- Does not add up to 100% due to multiple answers possible.

**Definitions:**
- Products and services brought directly over the Internet

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

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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.

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METHODOLOGY OF OUR TURKEY B2C E-COMMERCE MARKET 2018

Report Coverage
- This report covers the B2C E-Commerce market in Turkey. 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.

Report Structure
- The report starts with an overview of the B2C E-Commerce market and international comparisons, where the relevant country is compared to other countries in the region in terms of criteria relevant to E-Commerce.
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- 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 provides information related to delivery in B2C E-Commerce.
- Finally, the “Players” section contains information about the leading B2C E-Commerce companies, including rankings of top online shopping platforms by website visits.
- In addition, an extra section included in this report provides information on the payment methods accepted in online shops of the 100 largest retailers in Turkey.
TURKEY B2C E-COMMERCE MARKET 2018

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<td>€ 450</td>
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<td>May 2018</td>
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<td>China B2C E-Commerce Market 2018</td>
<td>May 2018</td>
<td>€ 950</td>
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<td>South Korea B2C E-Commerce Market 2018</td>
<td>May 2018</td>
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<td>Middle East B2C E-Commerce Market 2018</td>
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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.

**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>
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<tr>
<th>TITLE</th>
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<th>JOB TITLE</th>
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<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

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