

E-Commerce in Turkey

2015 Market Size

3 June 2016, Istanbul

Deloitte.



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Elektronik Ticaret İşletmecileri Derneği



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Project Stakeholders

Project Consultant

Deloitte.

Project Partner

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Project Data Partner

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E-Commerce Definition and Estimation Model



E-Commerce Definition and Scope

E-Commerce Definition

Product or service should be ordered through an online channel. Transactions through intermediary channels such as phone, fax, call center, e-mail and etc. are excluded

Product or service can be delivered either online or offline

Payment channel can be either online or offline

Out of scope transactions*



Orders placed through call-centers



Transactions executed between subsidiaries and branches through virtual POS



In person transactions executed through virtual POS

Scope



E-commerce volume of retailers that have a physical presence in Turkey

Monthly visits > 15k

B2C

C2C

B2B

*Transactions that are not considered B2C e-commerce although being executed through a virtual POS

Estimation Model

Monthly Visits



 COMSCORE.

Conversion Rate



internet
RETAILER

Discussions, press releases

Average Basket Size



internet
RETAILER

Discussions, press releases

x

x

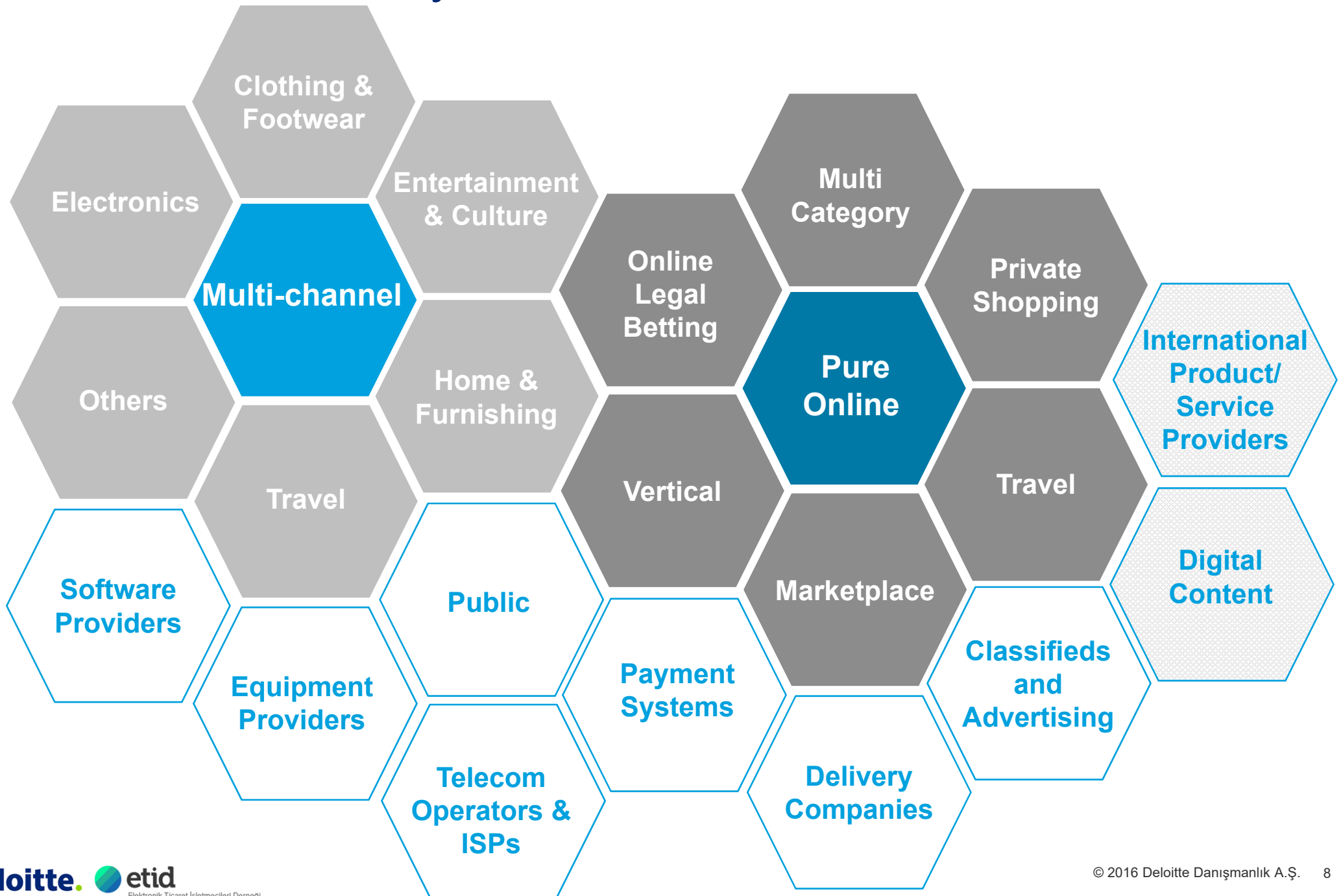
Discussions/ Updates/ Modifications with Sector Representatives



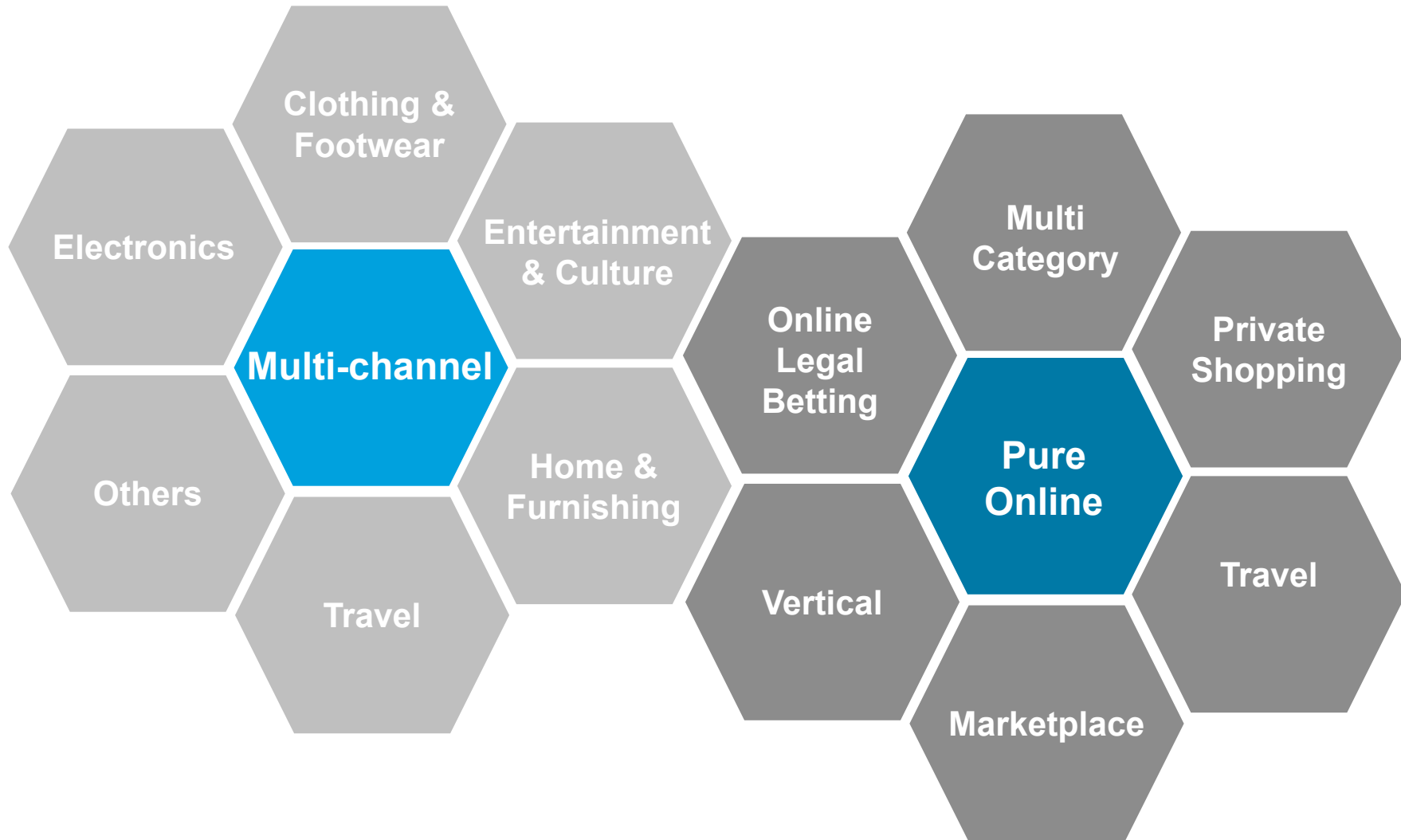
E-Commerce Ecosystem and Market Size in Turkey



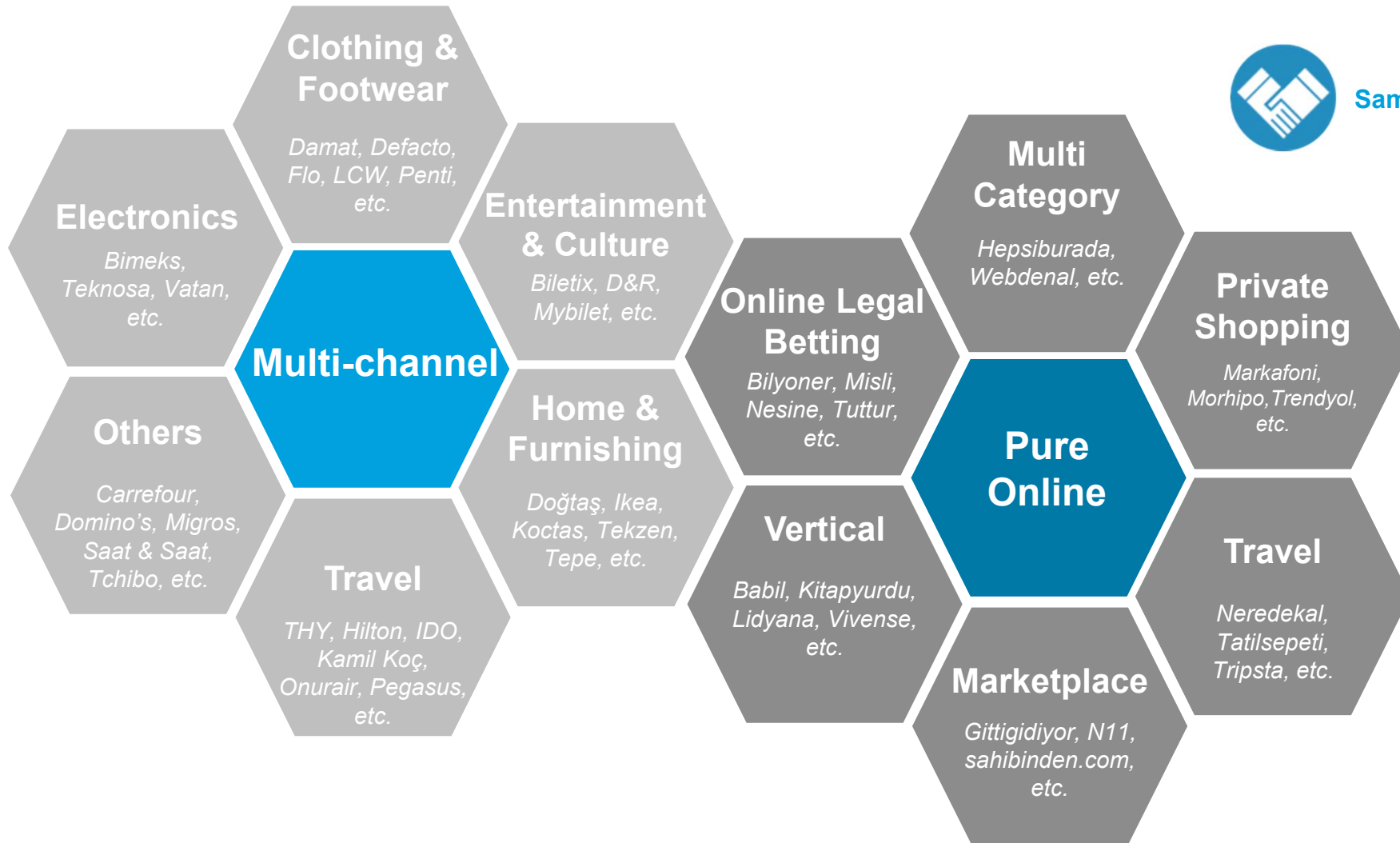
E-Commerce Ecosystem



Scope of Estimation Model

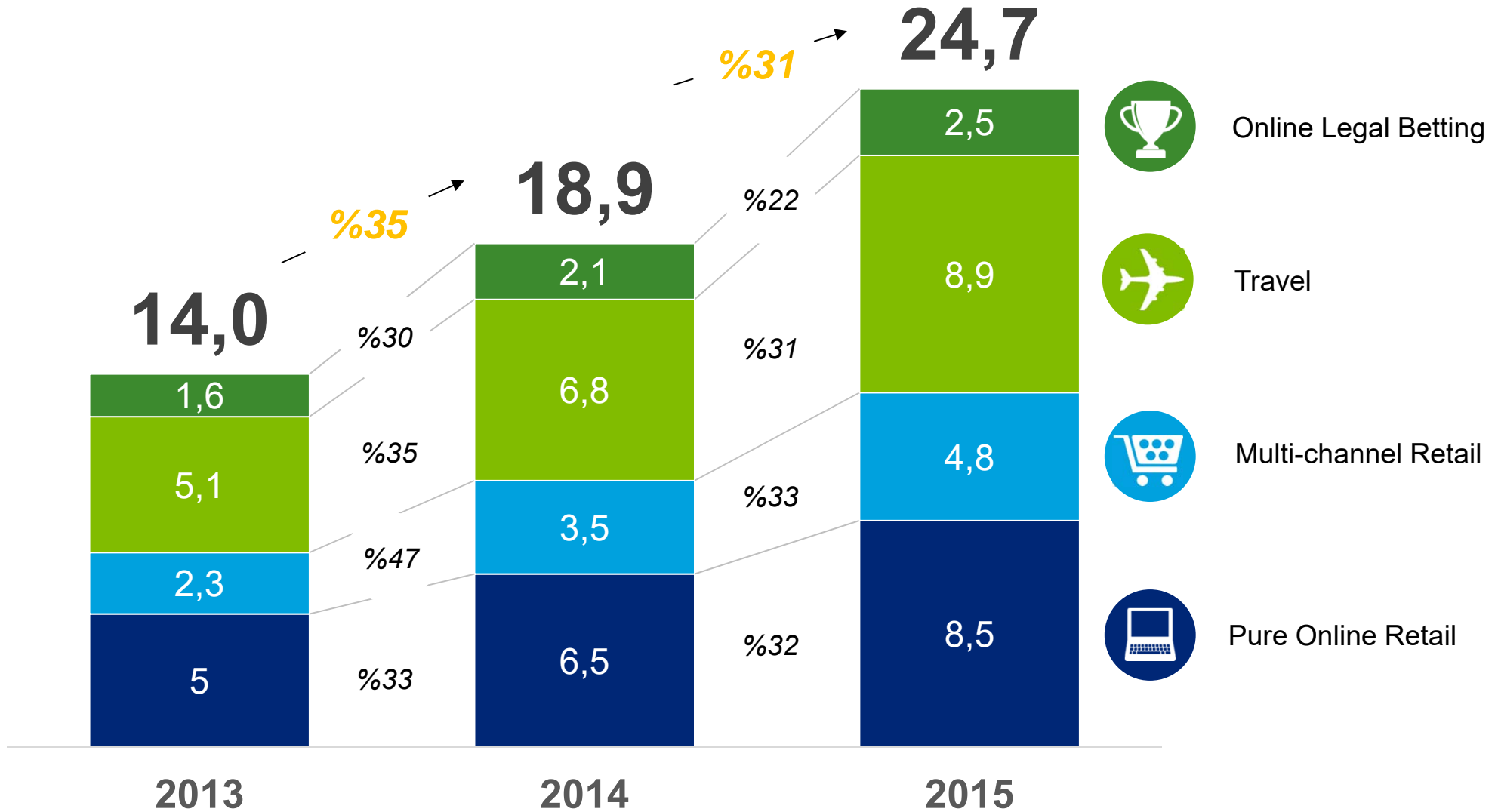


Scope of Estimation Model



E-Commerce Market Size in Turkey

TRY (bn)



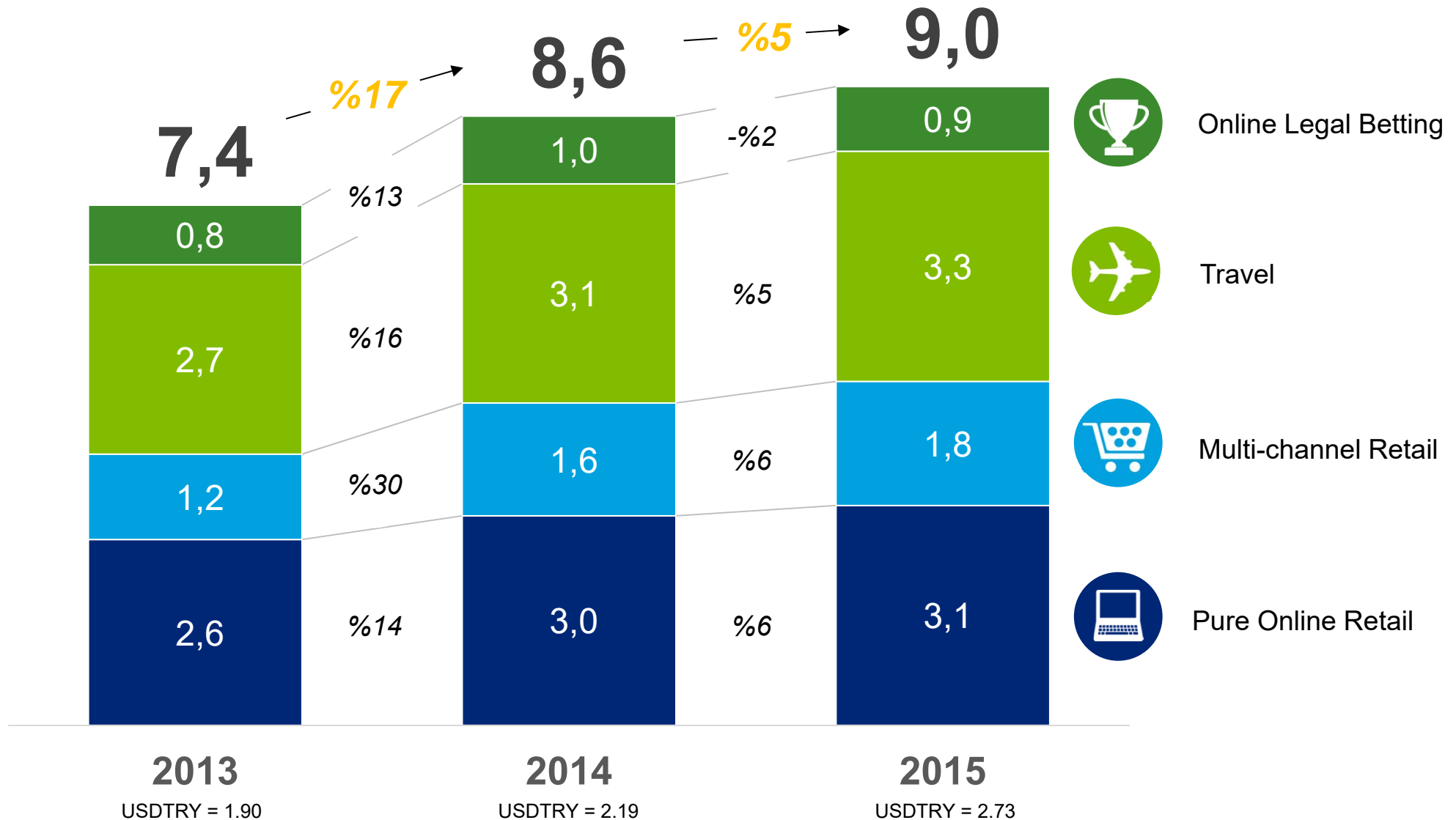
Figures exclude VAT

Non-Retail: 11,4 TRY (bn)

Retail: 13,3 TRY (bn)

E-Commerce Market Size in Turkey

USD (bn)



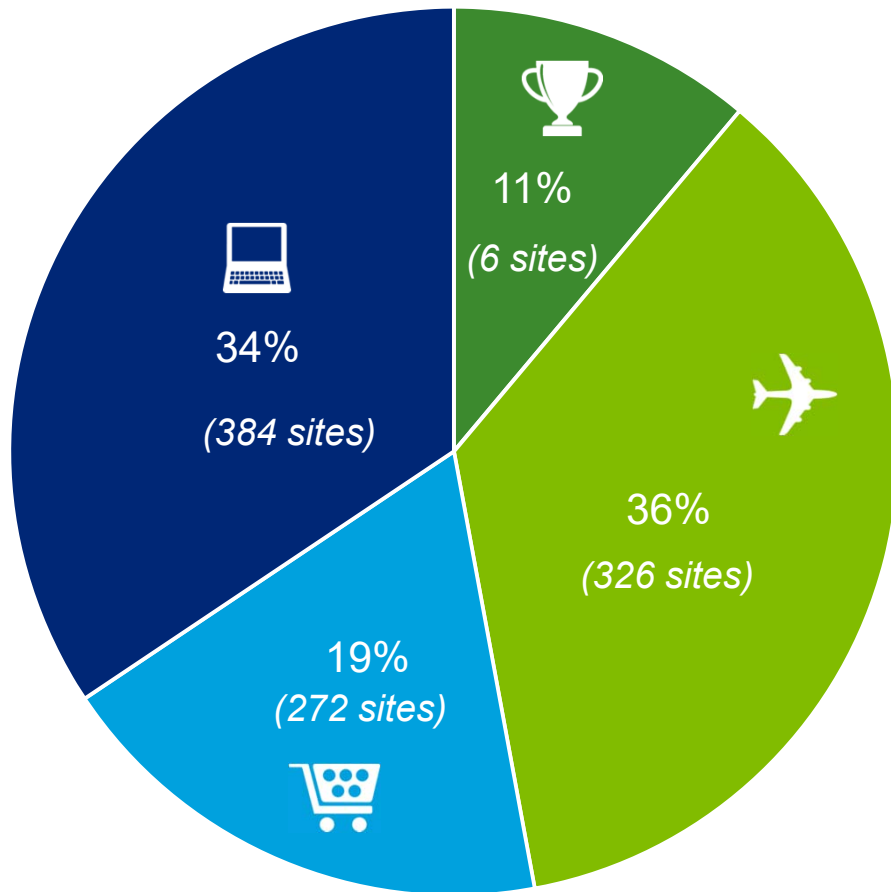
Non-Retail: \$4,2 bn

Retail: \$4,9 bn

E-Commerce Market Size in Turkey

Category mix and number of sites

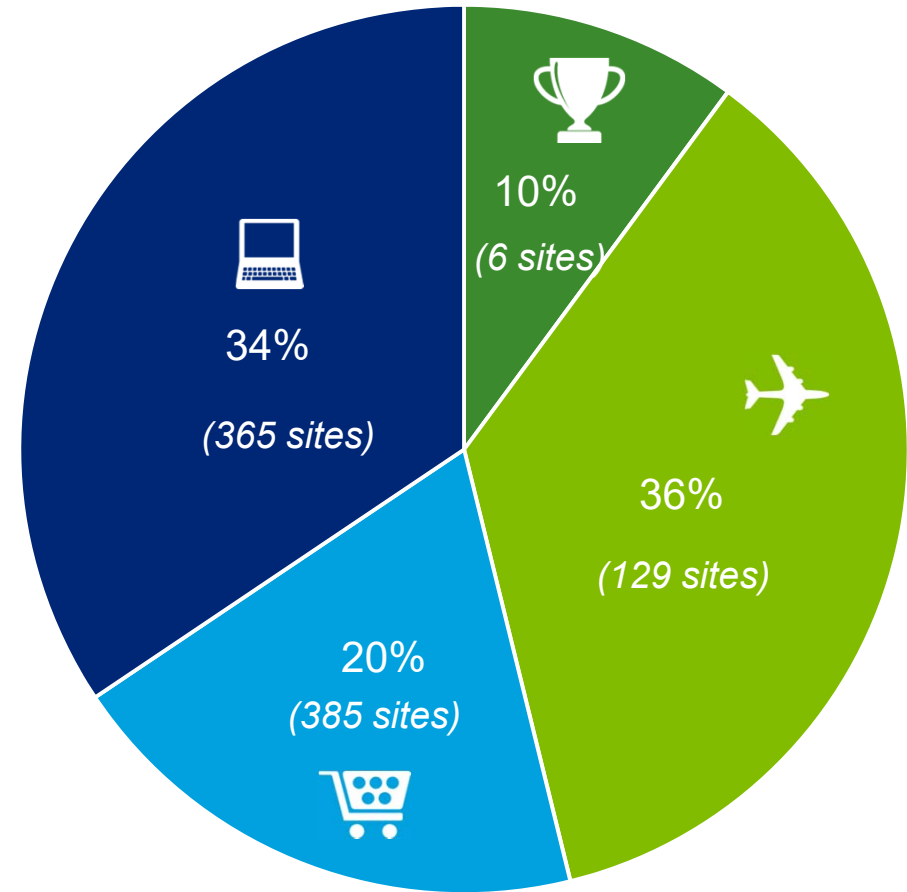
18,9 TRY (bn)



2014

Figures exclude VAT

24,7 TRY (bn)

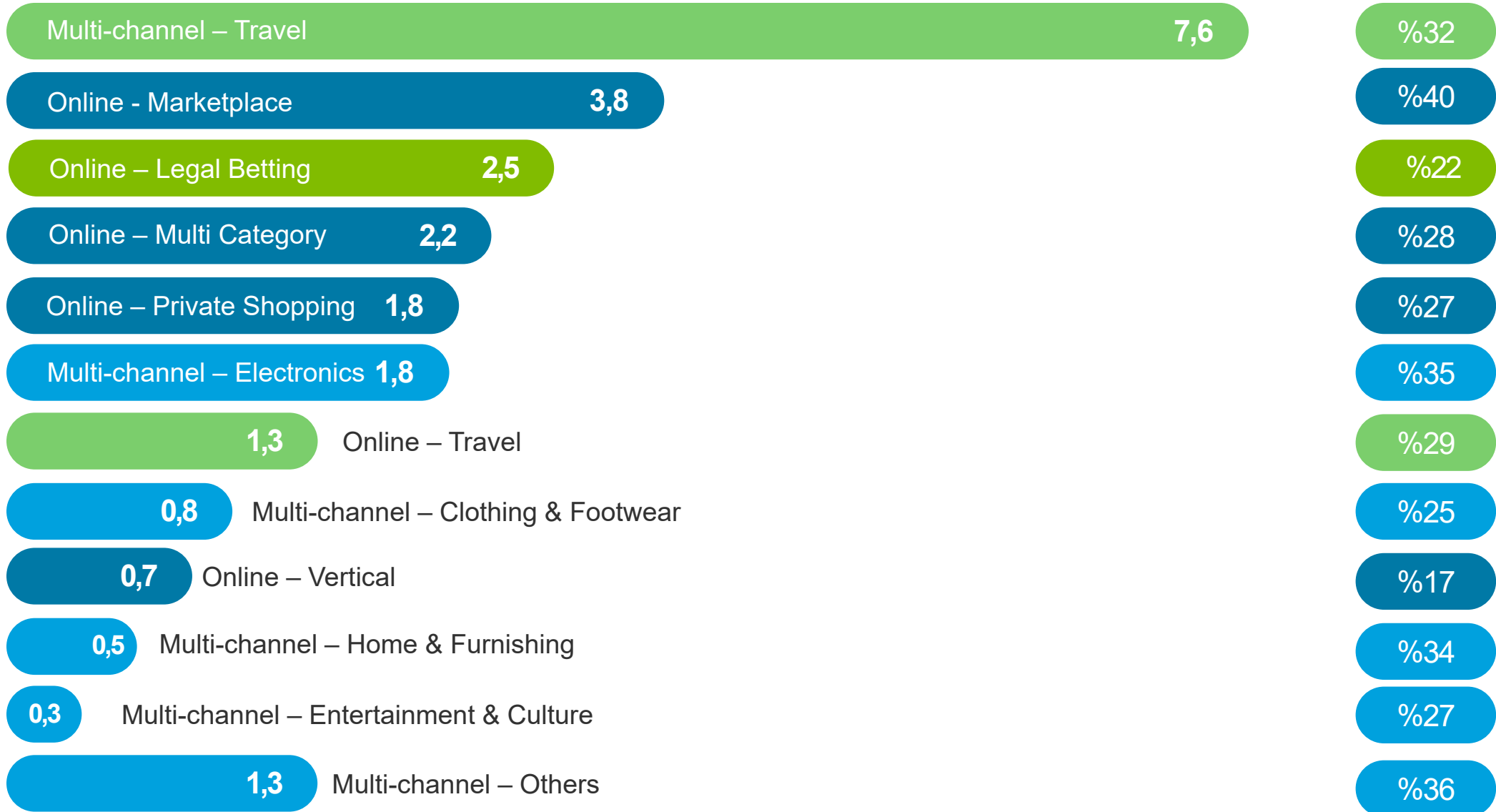


2015

E-Commerce Market Size in Turkey by Category

TRY (bn)

Category YoY
Growth Rate



*Figures exclude VAT. Totals may not add due to rounding

E-Commerce Comparison (2015)

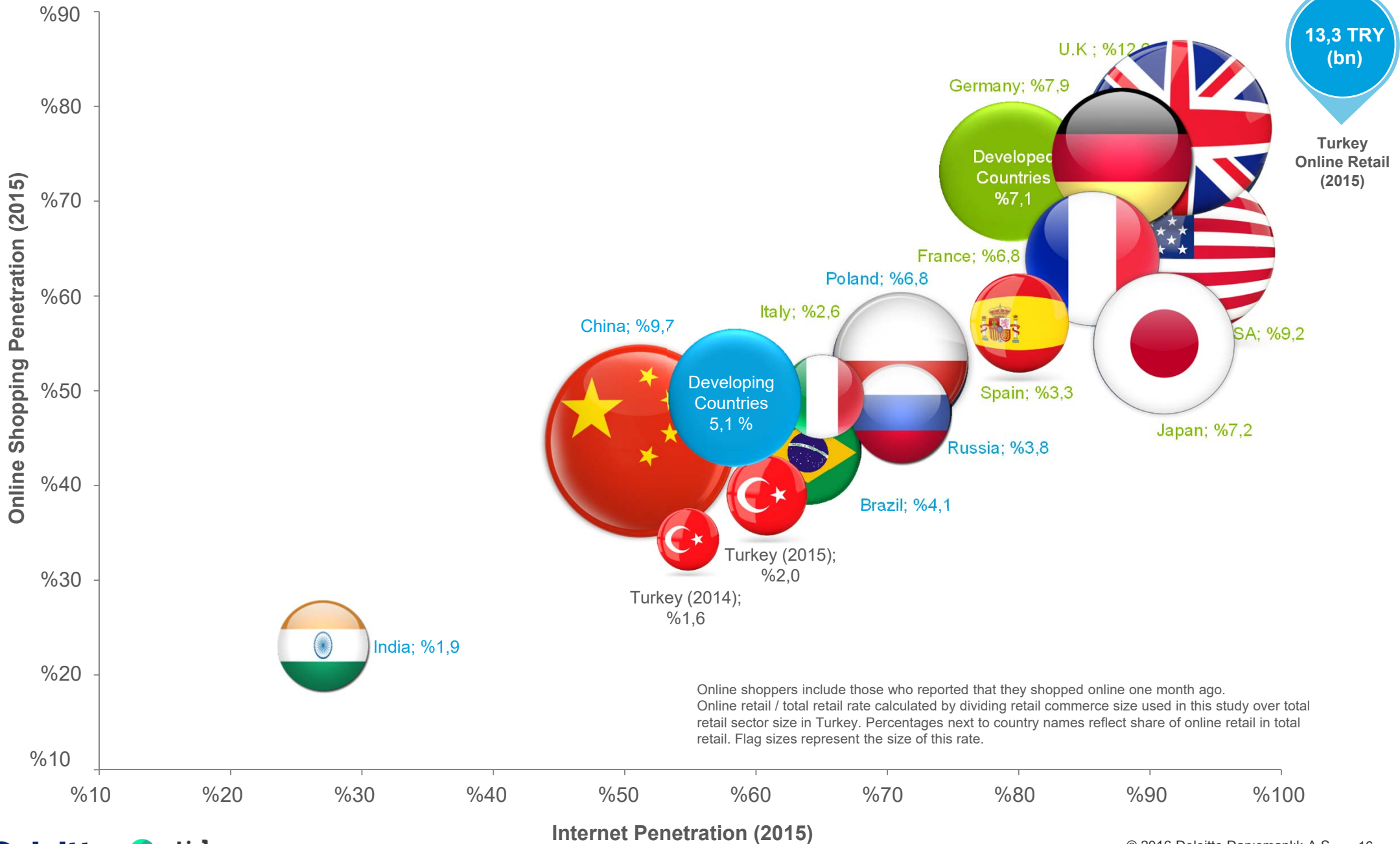
Country	Online Retail / Total Retail	Internet Penetration	Mobile Broadband Penetration	Online Shoppers	Mobile Shoppers	Income per capita K USD	Population (mn)
Developed Countries	U.K	12,6%	92%	79%	77%	41,2	65,1
	USA	9,2%	88%	88%	66%	55,8	323,7
	Germany	7,9%	88%	71%	74%	46,9	81,8
	France	6,8%	86%	74%	64%	41,2	66,7
	Japan	7,2%	91%	98%	55%	38,1	127,0
	Spain	3,3%	80%	69%	57%	34,8	46,4
	Italy	2,6%	65%	70%	49%	23%	35,7
Average %7,1							
Developing Countries	China	9,7%	51%	62%	44%	14,1	1.376
	Poland	6,8%	71%	65%	53%	26,5	38,4
	Brazil	4,1%	64%	73%	44%	15,6	206,2
	Russia	3,8%	71%	41%	48%	25,4	146,6
	India	1,9%	27%	15%	23%	17%	6,2
Average %5.1							
Turkey – 2014	1,6%	54%	42%	33%	19%	19,7	77,7
Turkey - 2015	2,0%	62%	50%	39%	24%	20,4	78,7

Income per capita calculated based on purchasing power parity. Online shoppers include those who shopped online one month ago.

Online retail / total retail rate calculated by dividing retail commerce size used in this study over total retail sector size in Turkey

Sources: EIU, Euromonitor, Statista, IMF, Global Web Index Q1 2016, InternetLiveStats Q4 2015, TUIK and Deloitte analysis; data from 2015. Internet penetration in Turkey derived from BTK and calculated by total subscribers divided by population. Mobile broadband penetration consists 3G and 4G subscribers, data is gathered from GSMA Intelligence for other countries and BTK for Turkey. Mobile shoppers calculated considering internet users who shopped online one month ago 2016 Q1.

E-Commerce Comparison (2015)





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Thank You

We would like to thank Deloitte Consulting, Association of E-Commerce Operators, ComScore and sector players for their valuable contributions.