



# Project Stakeholders

Project  
Consultant

**Deloitte.**

Project Partner

 **etid**  
Elektronik Ticaret İşletmecileri Derneği

Project Data  
Partner

 **comSCORE.**

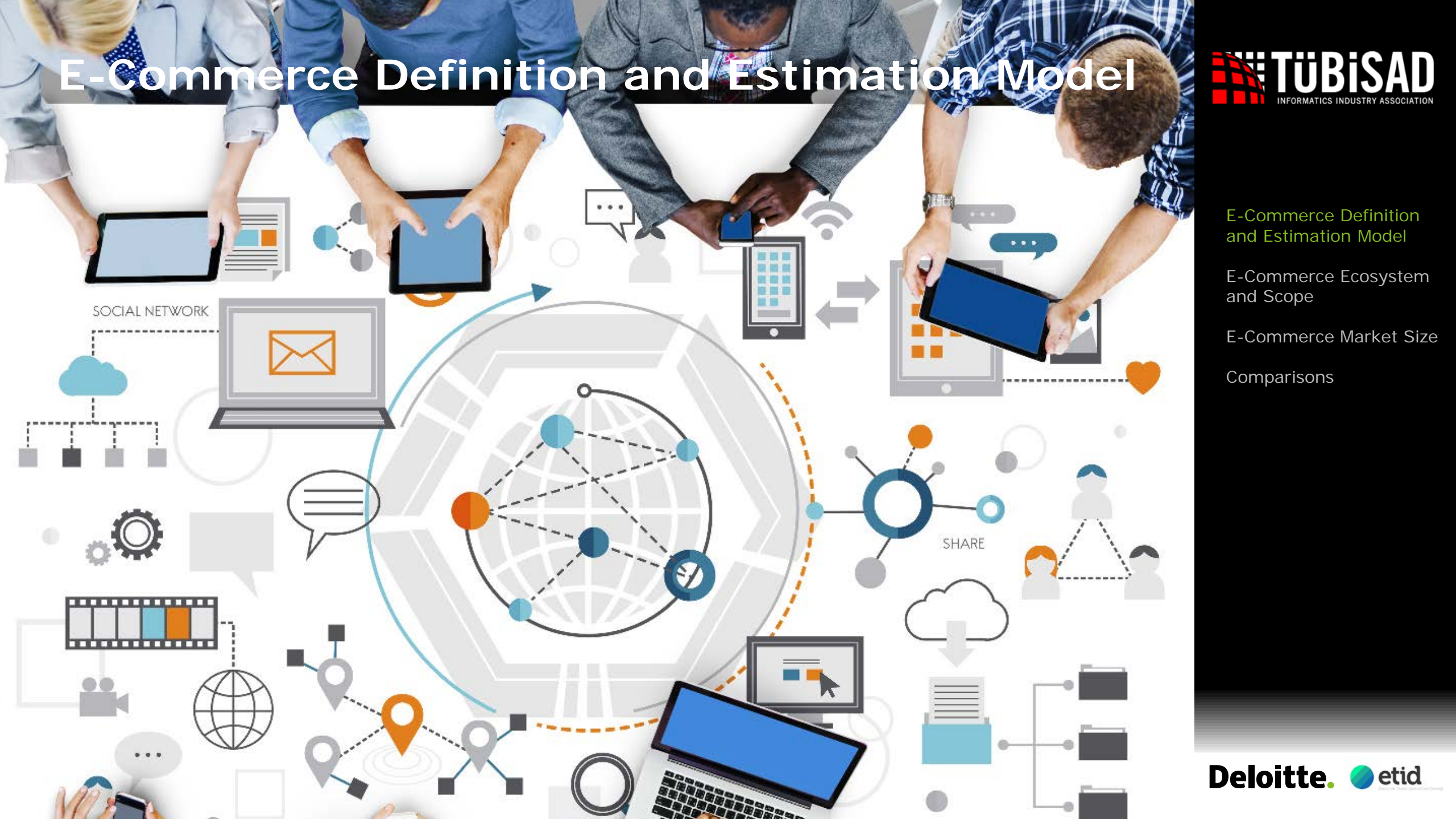
# E-Commerce Definition and Estimation Model

E-Commerce Definition  
and Estimation Model

E-Commerce Ecosystem  
and Scope

E-Commerce Market Size

Comparisons



# 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 over 15k

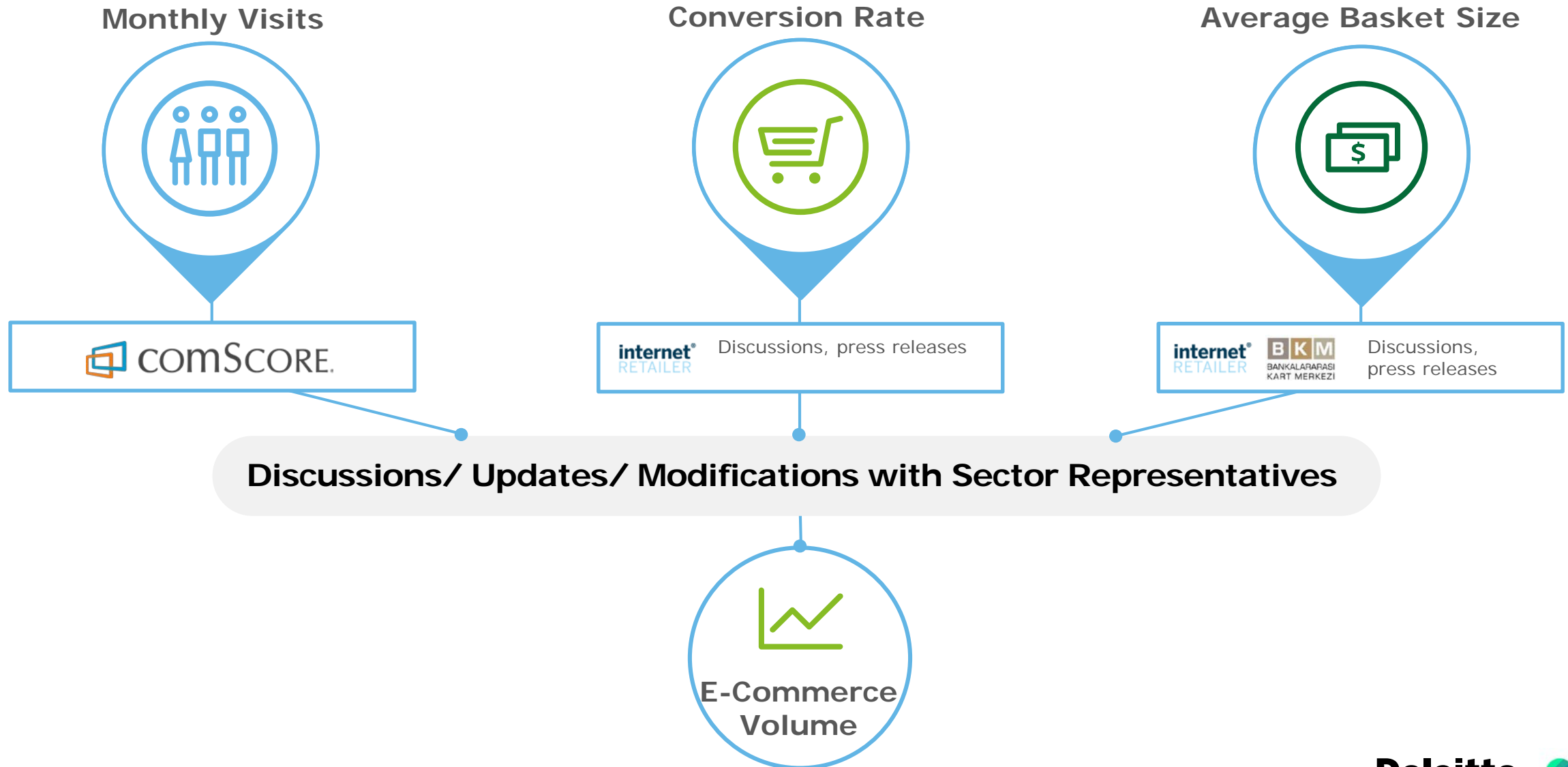
B2C

C2C

B2B

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

# Estimation Model



# E-Commerce Ecosystem and Scope



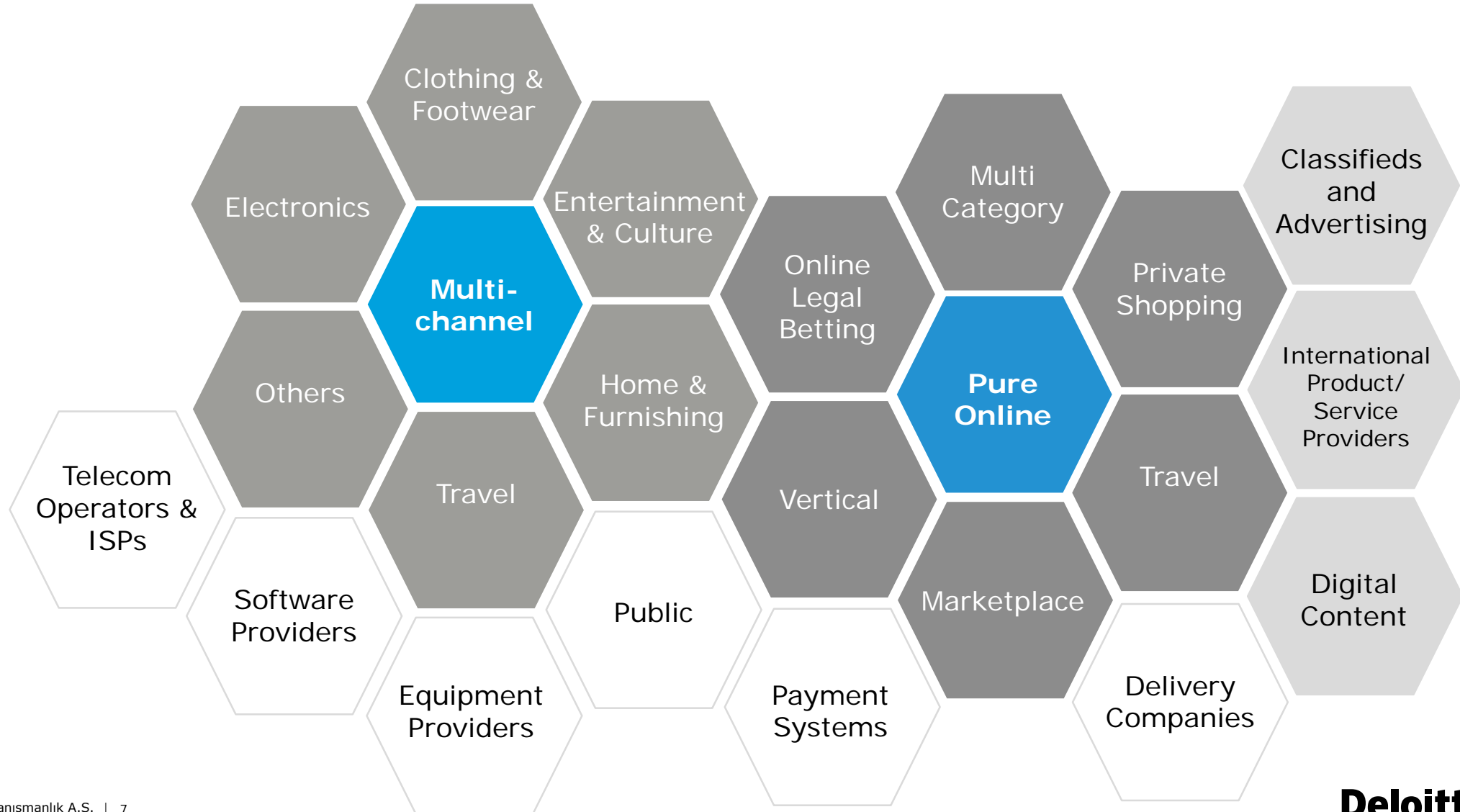
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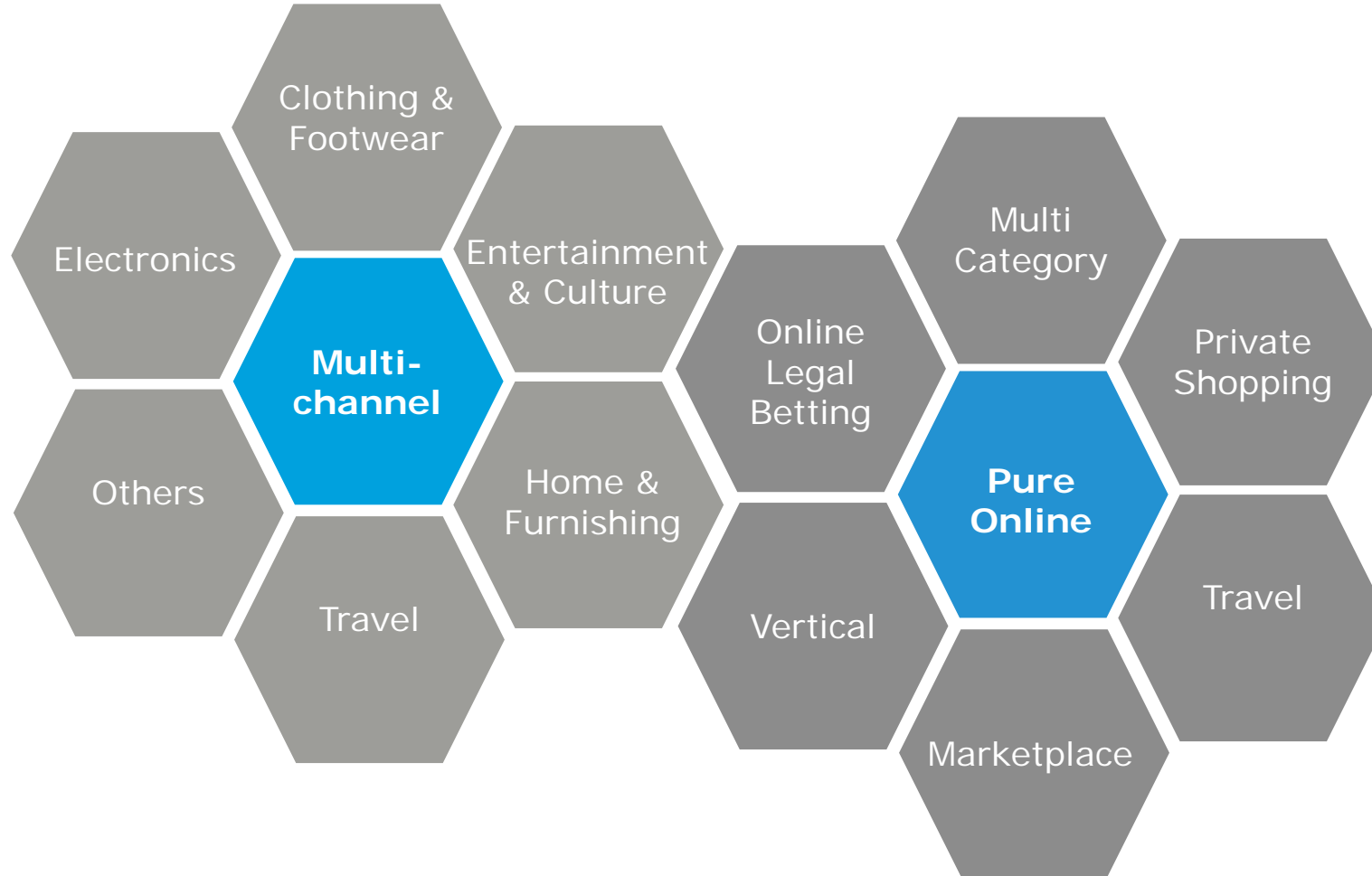
E-Commerce Market Size

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# E-Commerce Ecosystem

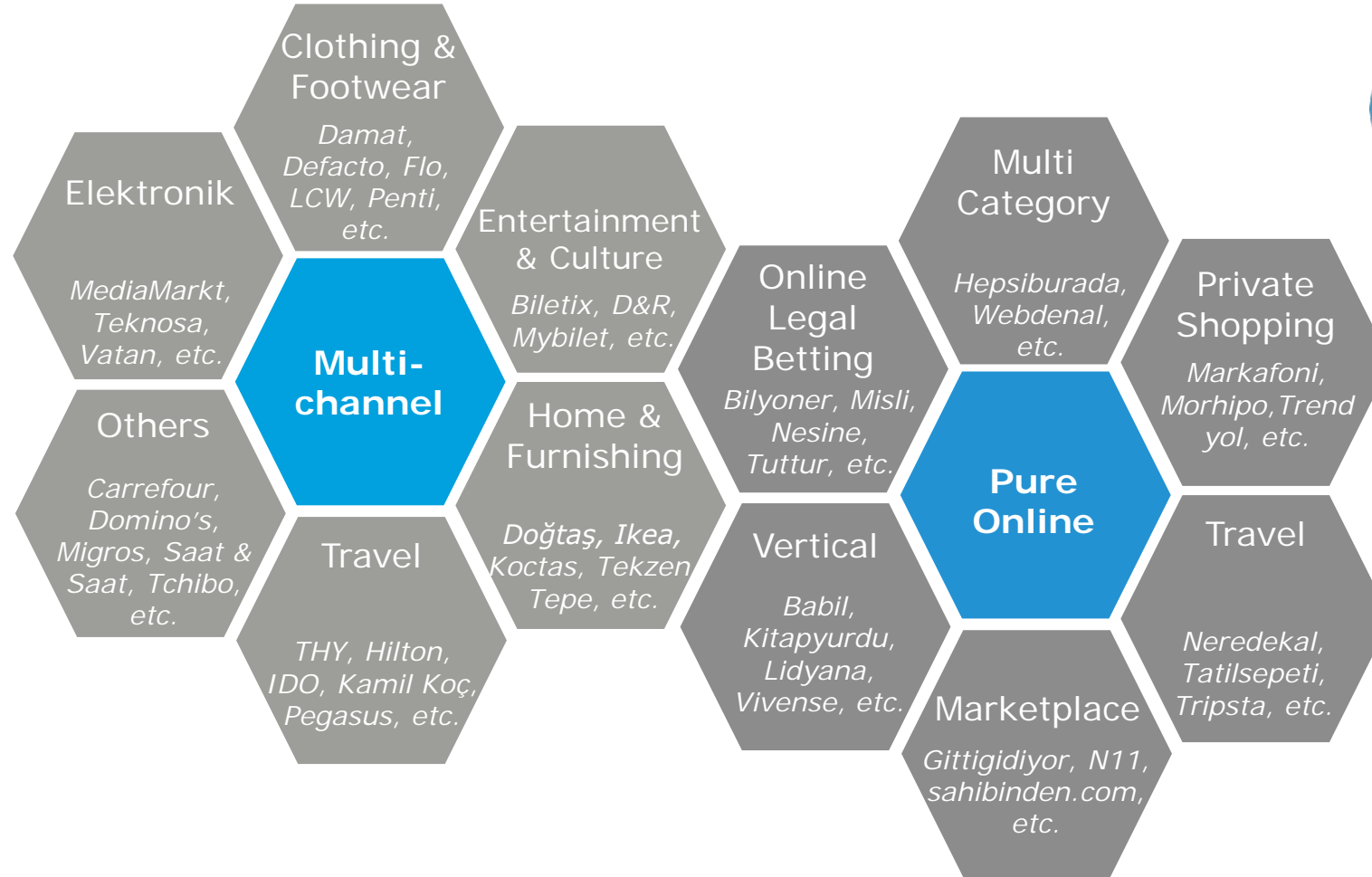


# Scope of Estimation Model





# Scope of Estimation Model



Sample sites

# E-Commerce Market Size

E-Commerce Definition  
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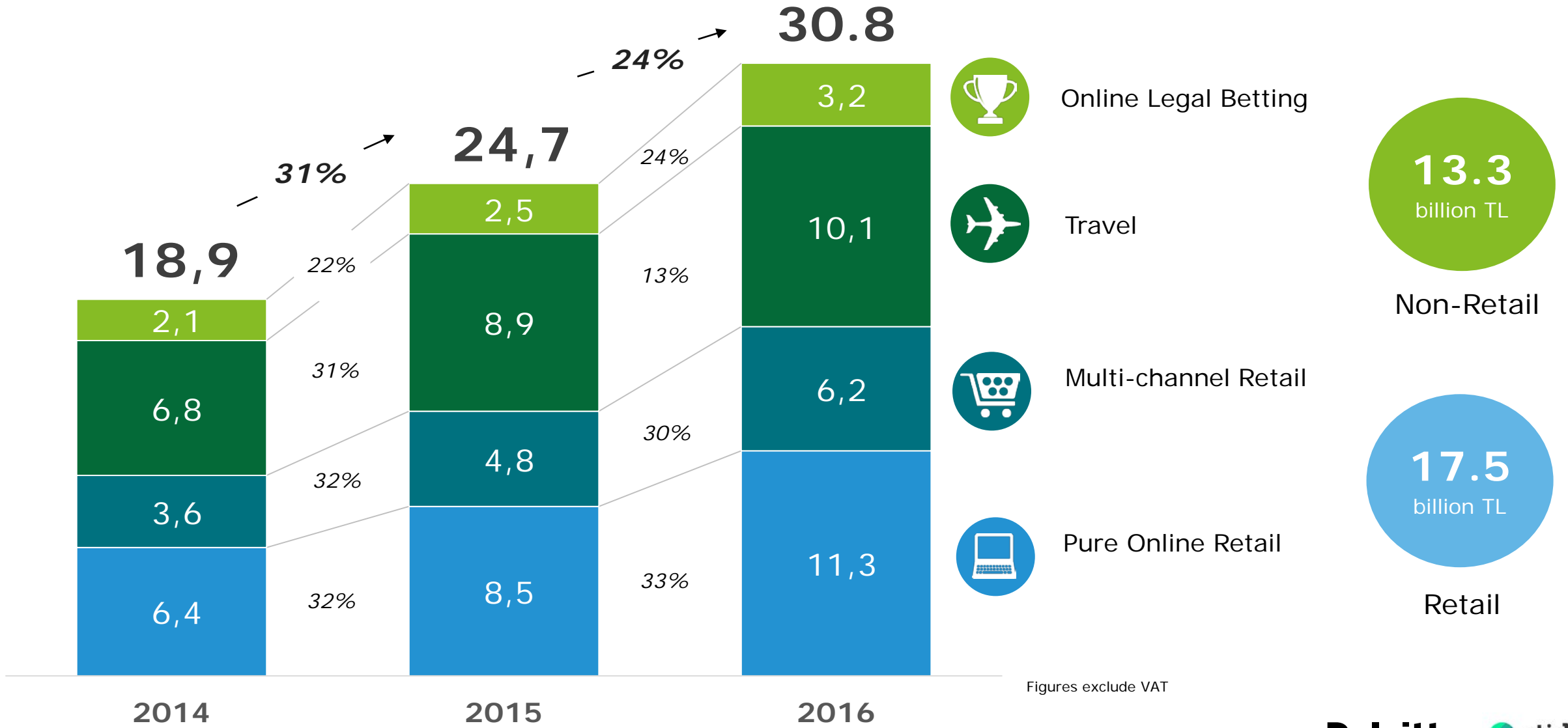
E-Commerce Ecosystem  
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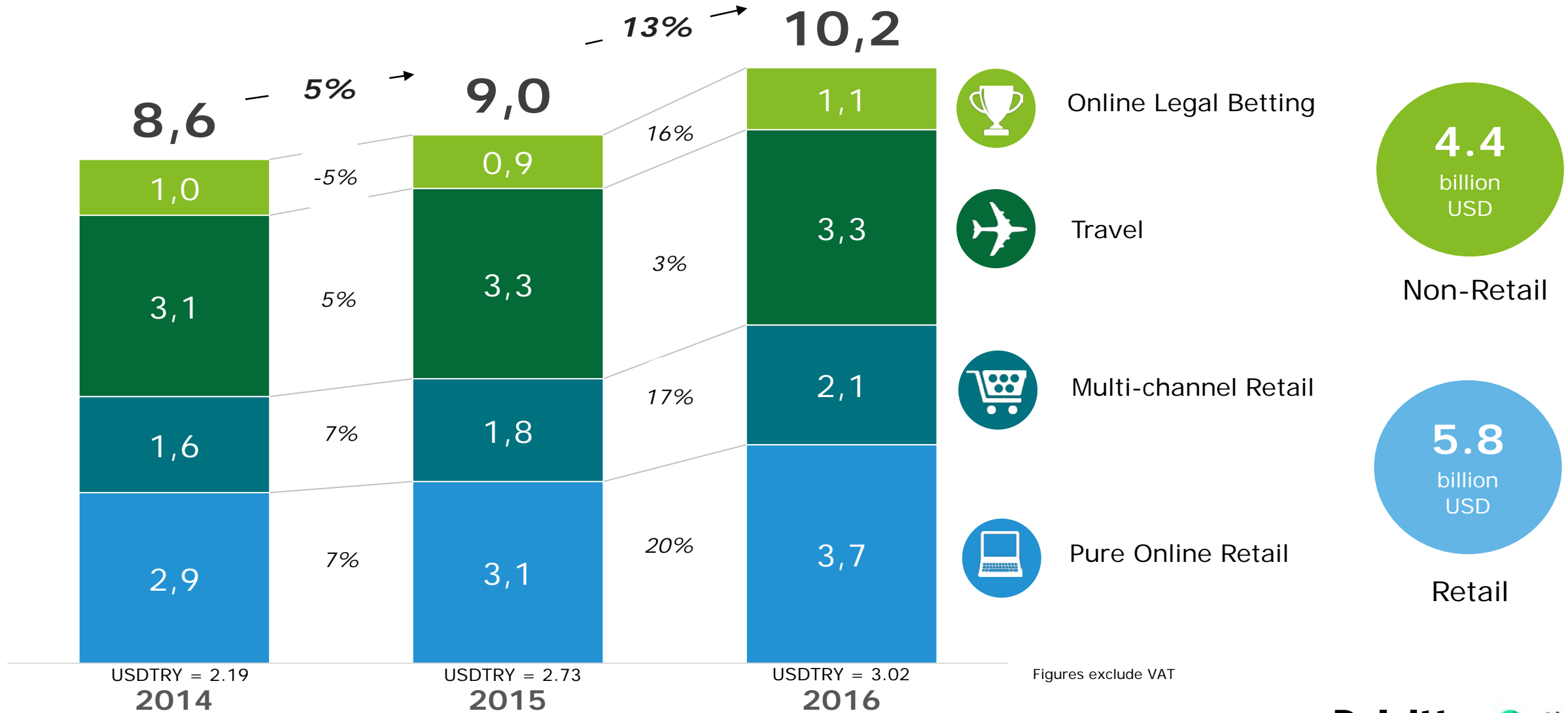
# E-Commerce Market Size in Turkey

billion TRY



# E-Commerce Market Size in Turkey

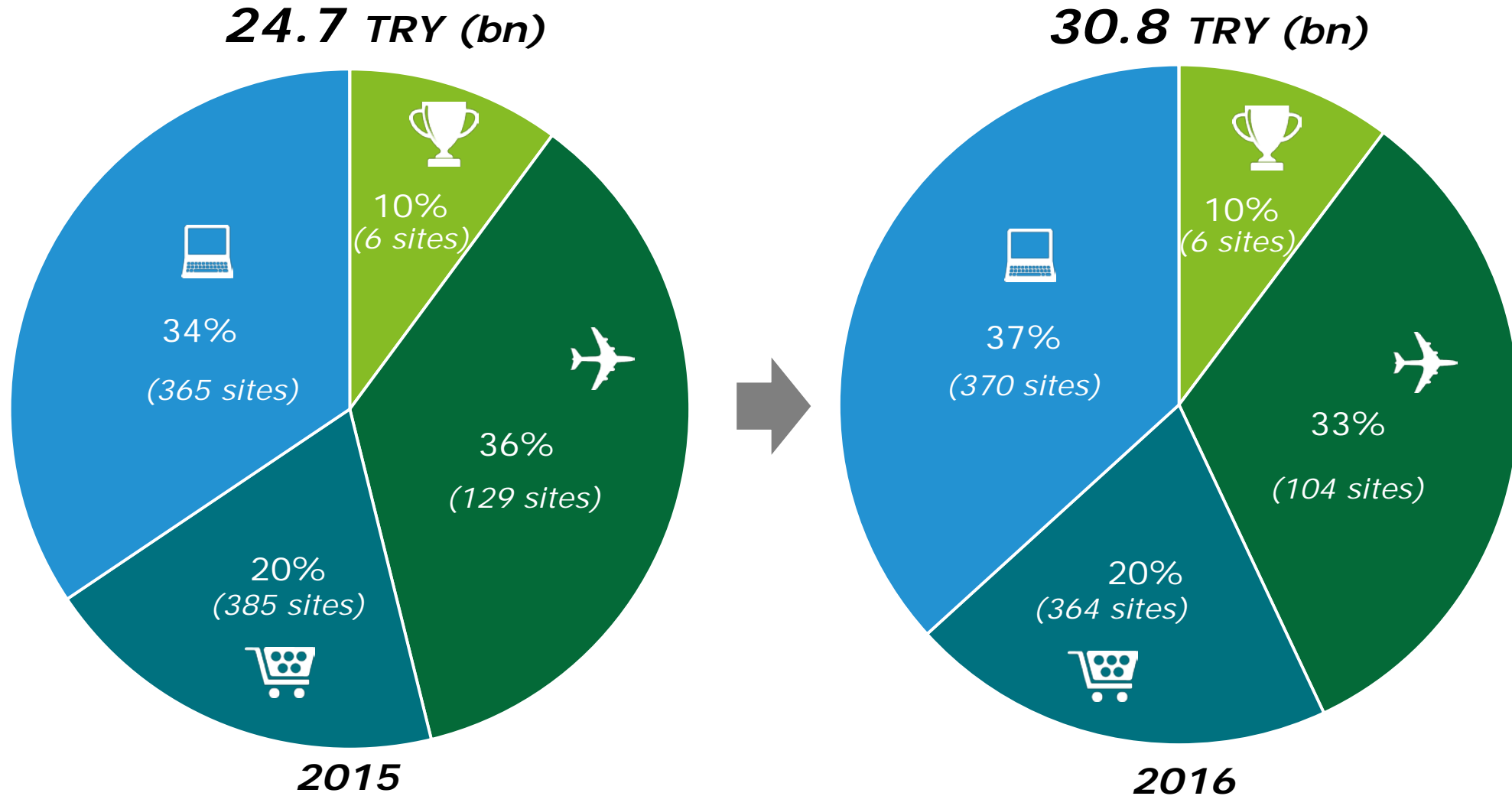
billion USD



Figures exclude VAT

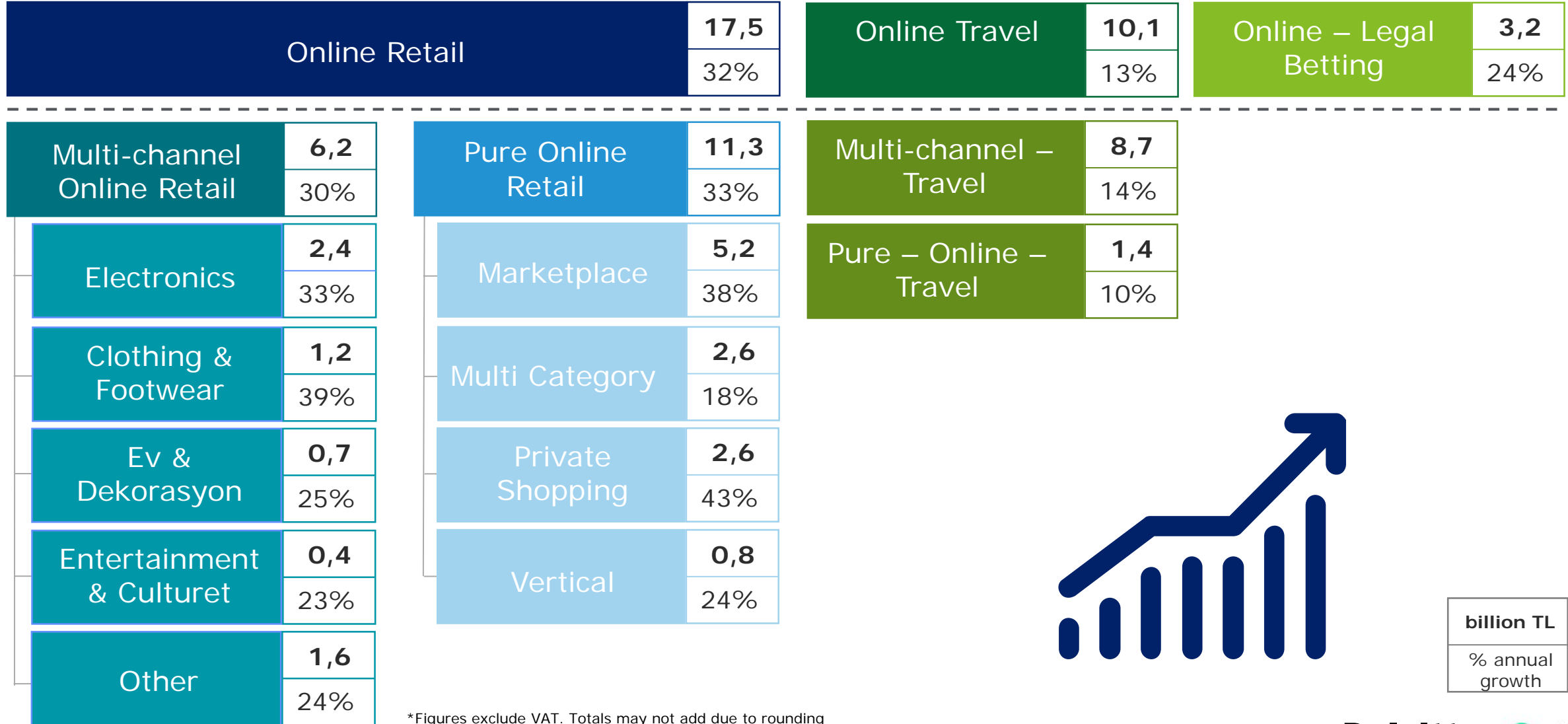
# E-Commerce Market Size in Turkey

Category mix and number of sites



# E-Commerce Market Size in Turkey by Category

billion TRY



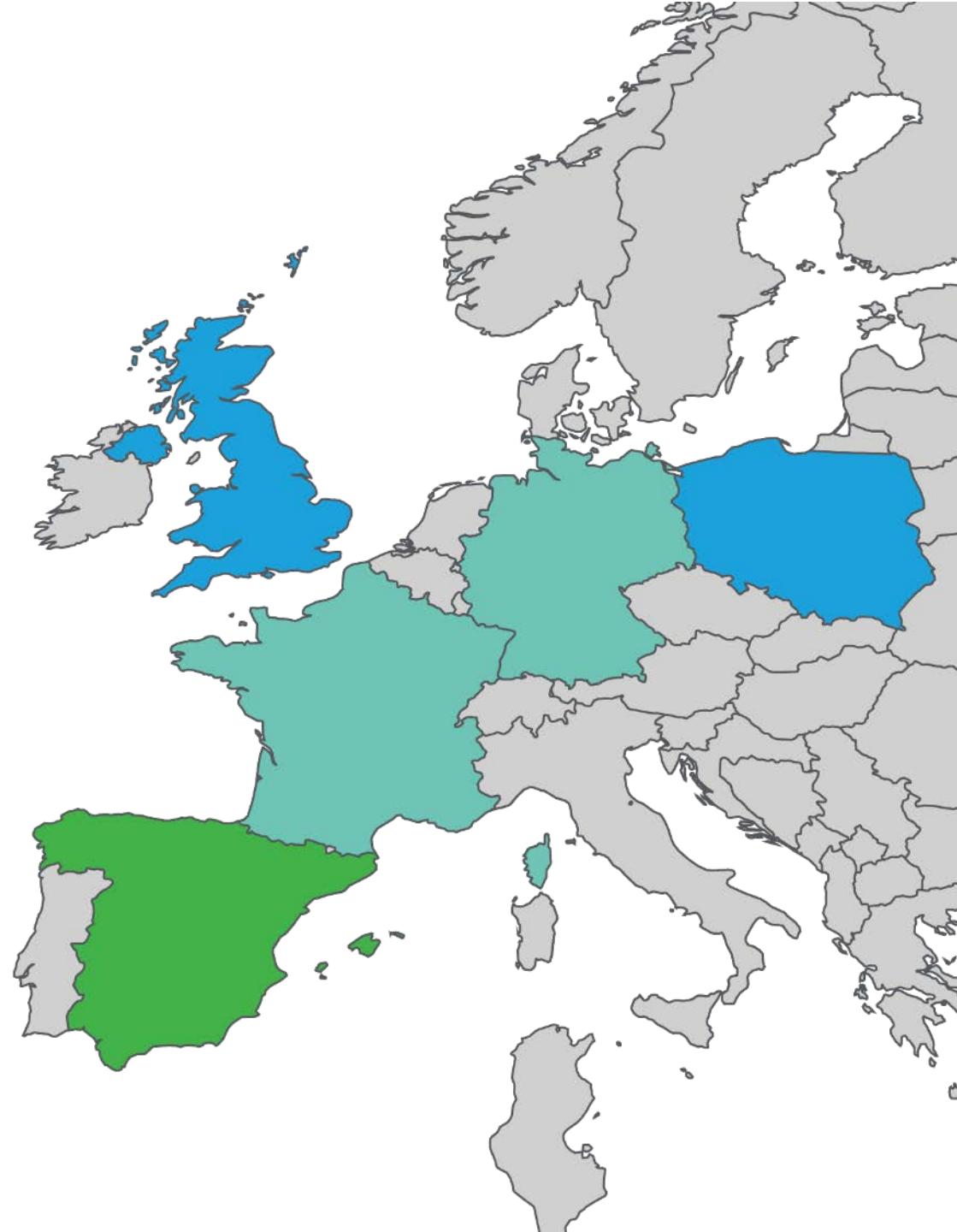
\*Figures exclude VAT. Totals may not add due to rounding

E-Commerce Definition  
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E-Commerce Market Size

Comparisons



# E-Commerce Comparison (2016)

Country	Online Retail / Total Retail	Internet Penetration	Mobile Broadband Penetration	Online Shoppers	Mobile Shoppers	Income per capita \$ K	Population (mn)
U.K	14,9%	38,5%	91,7%	76%	37%	\$42,5K	65,6 mn
USA	10,5	32,5	122,3	67	33	57,4	323,3
Germany	8,5	38,5	73,8	72	26	48,1	82,7
France	7,5	40,9	76,6	62	19	42,3	64,6
Japan	7,1	30,2	146,4	68	25	41,3	126,9
Spain	3,4	29,3	86,5	58	30	36,4	46,3
China	17,1	18,6	56,0	45	40	15,4	1.382,7
Poland	6,8	18,3	65,3	55	23	27,8	38,0
India	1,3	1,3	9,36	28	23	6,6	1.309,4
Brazil	4,0	12,3	88,6	45	26	15,2	206,1
Russia	3,8	18,8	71,3	46	21	26,5	143,4
Turkey 2015	2,9	12,1	49,6	39	24	24,2	78,7
<b>Turkey 2016</b>	<b>3,5</b>	<b>13,0</b>	<b>64,8</b>	<b>43</b>	<b>31</b>	<b>24,9</b>	<b>79,8</b>

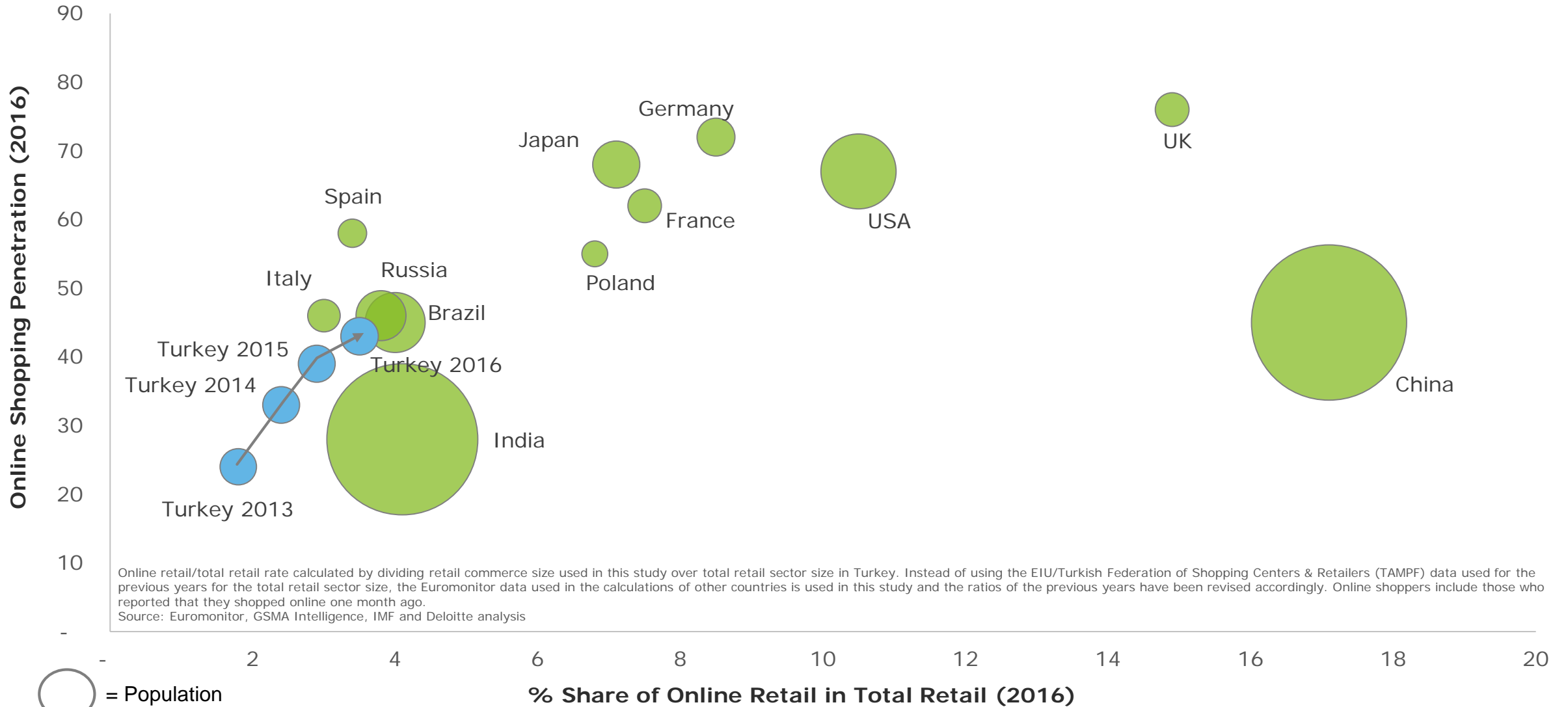
Average  
8,8% \*

Average  
3,8% \*

Online retail/total retail rate is calculated by dividing retail commerce size used in this study over total retail sector size in Turkey. Instead of using the EIU/Turkish Federation of Shopping Centers & Retailers (TAMPF) data used for the previous years for the total retail sector size, the Euromonitor data used in the calculations of other countries and the ratios of the previous years have been revised accordingly. Turkey data for broadband penetration is taken from BTK and it is calculated by the ratio of the number of subscribers to the population. Per Capita Income is calculated according to Purchasing Power Parity. Online shoppers include those who reported that they shopped online one month ago. Country groups are organized according to World Economic Situation and Prospects, 2016 classification. The developed country average is calculated using data from 31 countries that are predominantly European countries. Developing countries are composed of 48 countries except China. Source: Euromonitor, IMF, OECD Broadband port, ITU World Telecommunication / ICT Indicators Database, BTK, GSMA Intelligence, and Deloitte analysis; The broadband penetration of non-OECD countries is due in 2015.



# E-Commerce Ecosystem and Scope (2016)





**Deloitte.**



Thank You

We would like to thank  
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valuable contributions.