



**E-Commerce in Turkey** 2018 Market Size April 2019

**Deloitte.** 

#### Project stakeholders



Project Consultant

## Deloitte.

**Project Data Partners** 







#### 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, etc. are excluded

Product or service can be delivered either online or offline

Payment can be made either online or offline

#### Out of scope transactions\*

Orders placed through call-centers

Transactions executed between subsidiaries and branches through e-POS

In-person transactions executed through e-POS

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

#### Scope



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

Sites with monthly visits over 15k

B<sub>2</sub>C



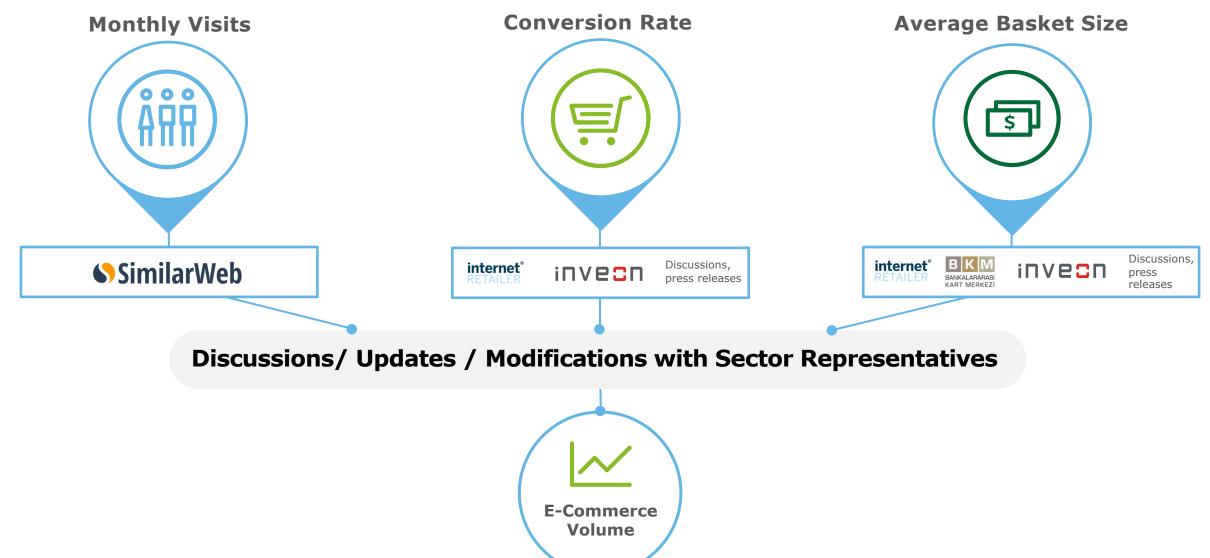
B<sub>2</sub>B

\*\*Sales which are executed through social media channels are not considered



#### **Estimation model**

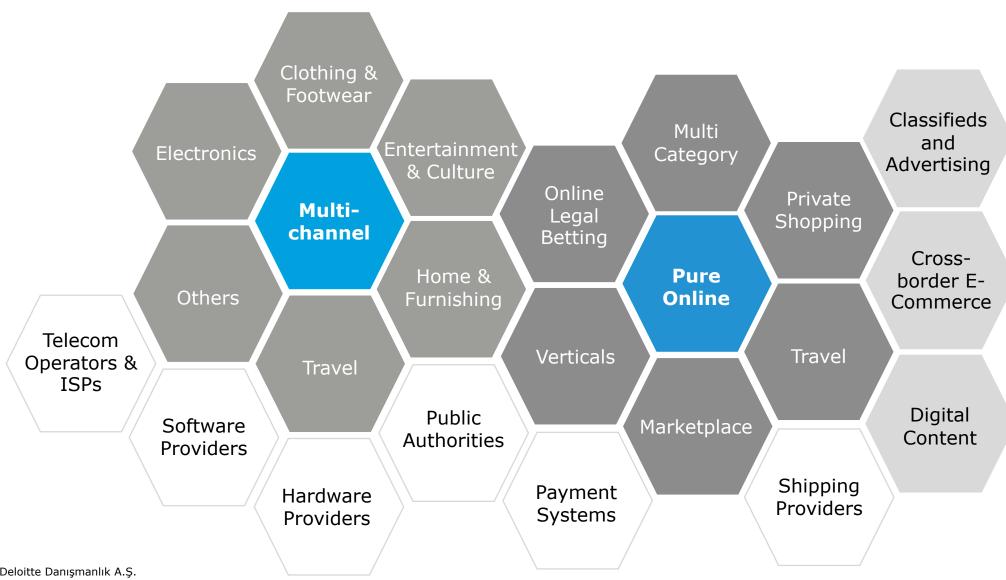






#### E-Commerce ecosystem





#### Scope of estimation model

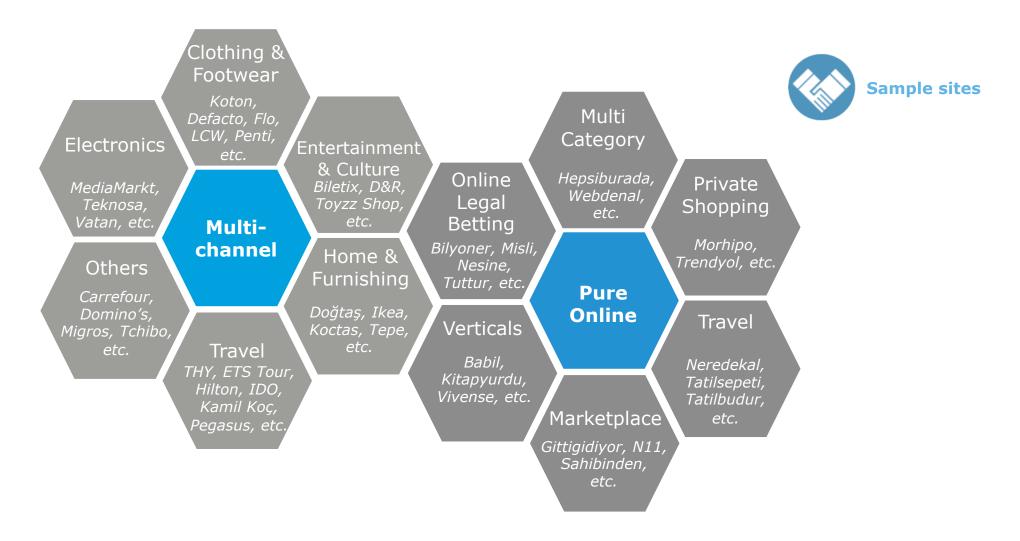






#### Scope of estimation model



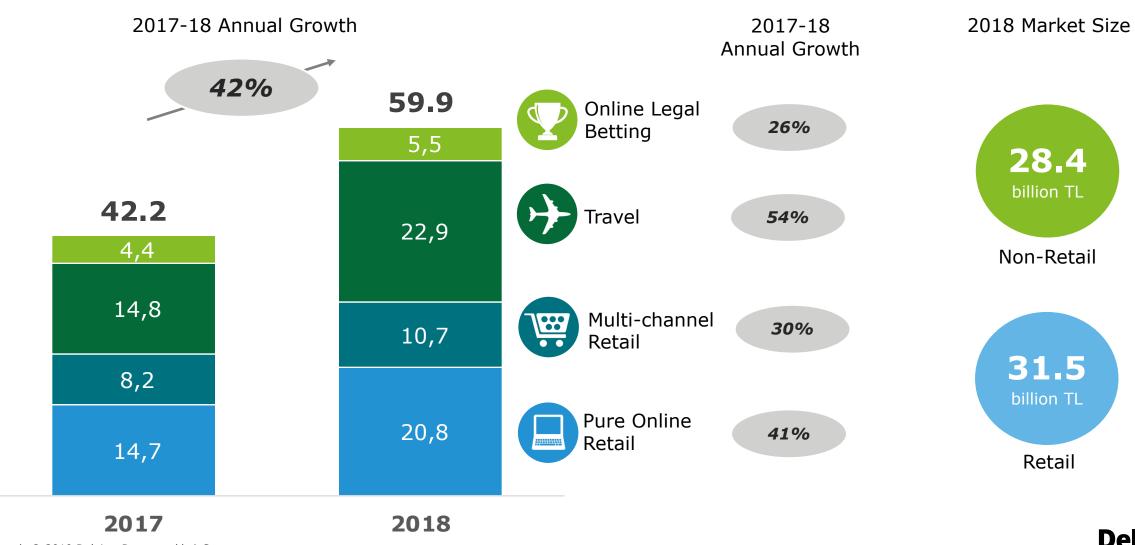






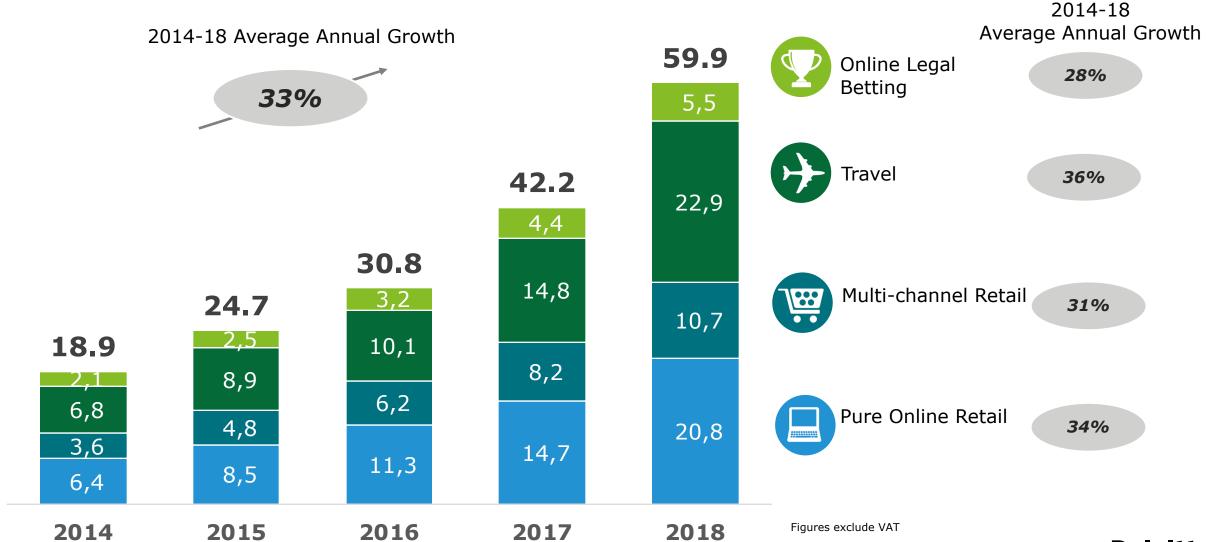
#### E-Commerce market size in Turkey (billion TRY)





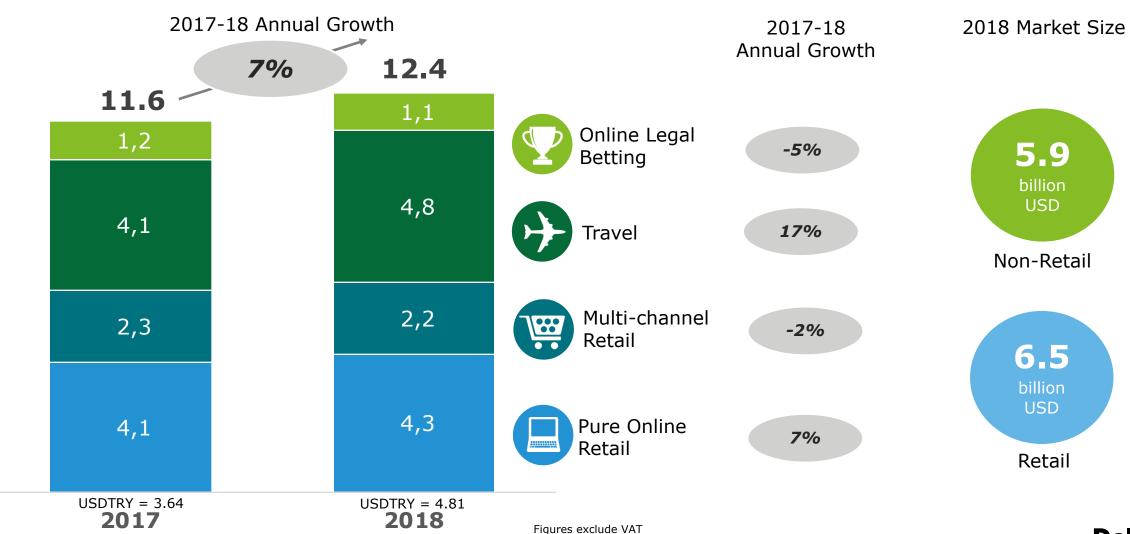
### E-Commerce market size in Turkey (billion TRY)





#### E-Commerce market size in Turkey (billion USD)

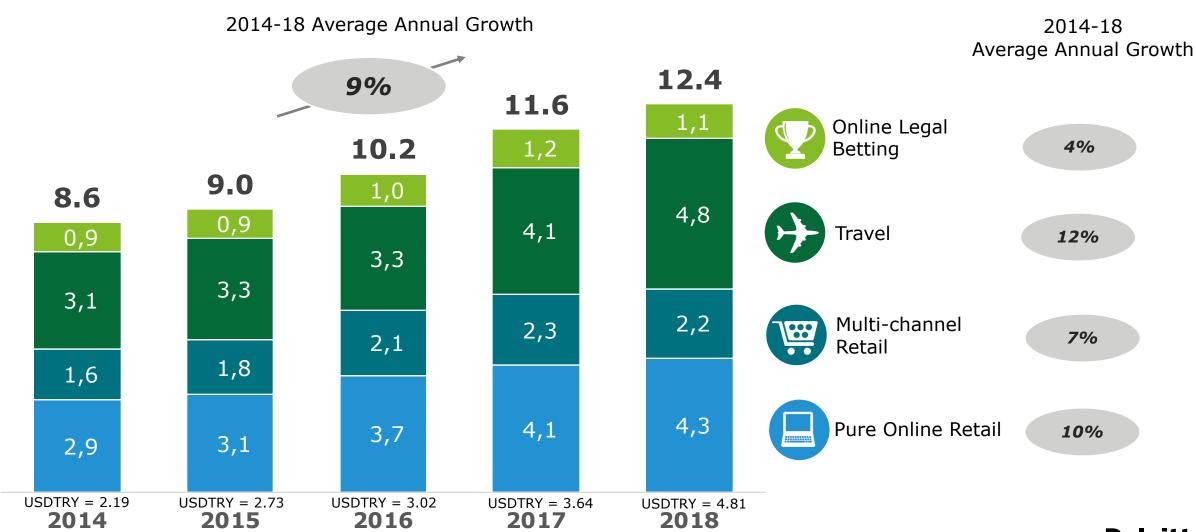






#### E-Commerce market size in Turkey (billion USD)

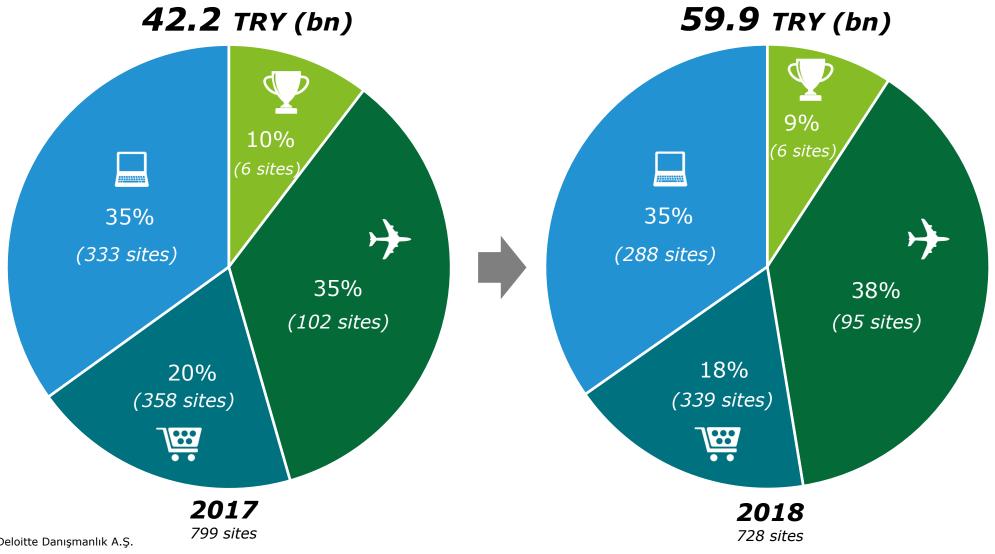




#### E-Commerce market size in Turkey

Category mix and number of sites





### E-Commerce market size in Turkey by category

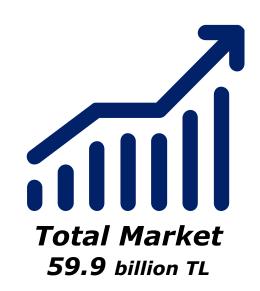


billion TRY

Online Retail				Online Travel	<b>22,9</b> %54	Online Legal Betting	<b>5,5</b> %26
Multi-channel Online Retail	<b>10,7</b> %30	Pure Online Retail	<b>20,8</b> %41	Multi-channel – Travel	<b>20,0</b> %56		
Electronics	<b>3,4</b> %13	<ul><li>Marketplace</li></ul>	<b>10,4</b> %48	Pure Online – Travel	<b>2,9</b> %45		

Multi-channel	10,7		
Online Retail	%30		
Floatronica	3,4		
<ul><li>Electronics</li></ul>	%13		
Clothing &	2,6		
Footwear	%52		
Home &	1,3		
Furnishing	%46		
Furnishing Entertainment	%46 <b>0,5</b>		
Entertainment	0,5		

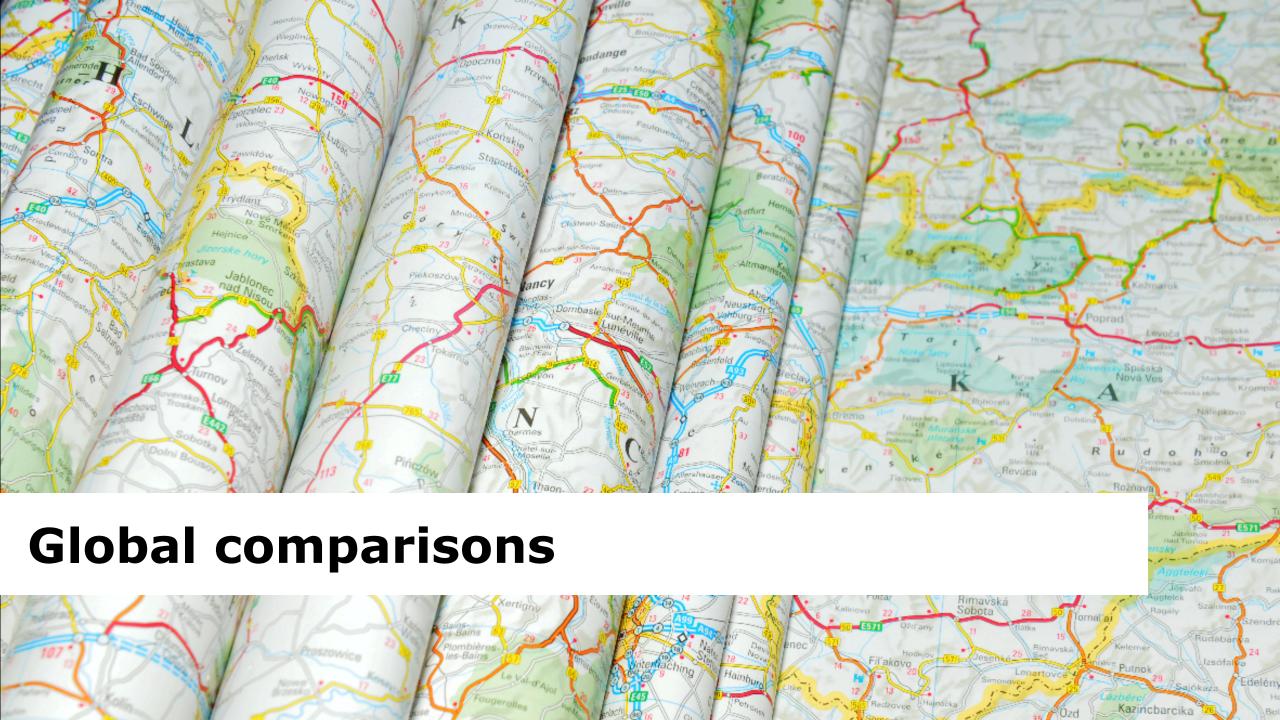
Pure Online	20,8		
Retail	%41		
Maylyabalaga	10,4		
<ul> <li>Marketplace</li> </ul>	%48		
Mulhi Caharama	4,8		
– Multi Category	%37		
Private	4,4		
Shopping	%35		
V	1,2		
Verticals	%26		





billion TL 2017-18 % growth

<sup>\*</sup>Figures exclude VAT. Totals may not add due to rounding



### Global comparisons (2018)



	Country	Online Retail / Total Retail	Internet Penetration	Mobile Broadband Penetration	Online Shoppers	Mobile Shoppers	Income per capita \$ K	Population (mn)
	UK	17.0%	39.9%	98.5%	81%	45%	\$45.7K	66.4 mn
<b>Developed</b> <b>Countries</b>	USA	13.7	33.4	136.6	77	44	62.6	328.1
	Germany Average 11.1%		40.7	81.0	81	29	52.5	82.7
velo	France	8.8	42.9	85.5	71	26	45.7	65.0
O	Japan	8.6	31.1	168.1	68	34	44.2	126.4
	Spain	4.6	31.6	96.9	72	40	40.1	46.2
	China	23.7	31.8	98.1	82	74	18.1	1,396.9
Developing Countries	Poland	6.7	18.4	102.6	76	36	31.9	37.9
	India <b>5.9</b> %*		1.5	35.9	74	60	7.8	1,334.2
	Brazil	7.2	14.6	96.7	68	45	16.1	209.2
	Russia	5.0	22.7	90.3	58	32	29.2	143.9
	Turkey 2017	4.1	14.7	69.9	43	30	26.9	80.8
	Turkey 2018	5.3	16.3	74.5	67	50	27.9	82.0

Online retail/total retail ratio is calculated by dividing retail e-commerce size used in this study over total retail sector size in Turkey estimated that Euromonitor. 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 and mobile shoppers are based on internet users who reported that they shopped online (desktop vs mobile) one month ago. Country groups are organized according to World Economic Situation and Prospects, 2017 classification. \*The developed country average is calculated using data from 32 countries that are predominantly European countries. \*\*Developing countries are composed of 47 countries except China.

Source: Euromonitor, IMF, OECD, GlobalWebIndex, BTK, GSMA Intelligence, TURKSTAT and Deloitte analysis.



### Global comparisons (2018)



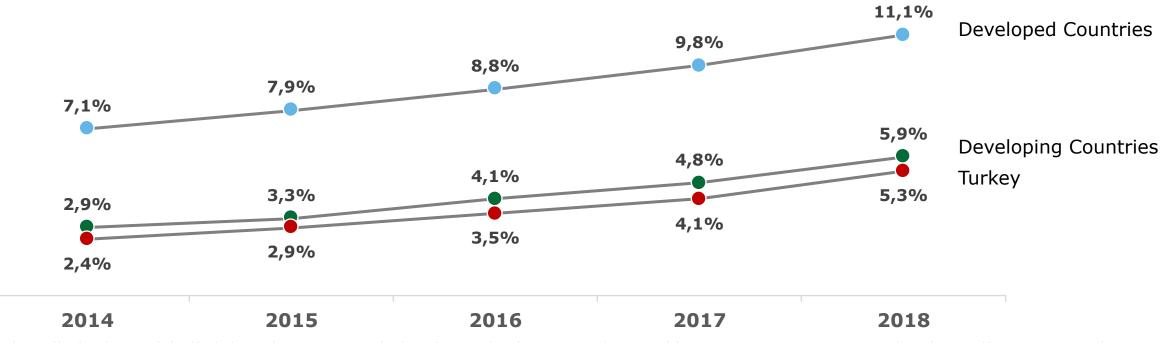


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## Global comparisons (2014-2018)



#### % of Online Retail in Total Retail (2014-2018)



Online retail/total retail ratio is calculated by dividing retail e-commerce size used in this study over total retail sector size in Turkey estimated that Euromonitor. Country groups are organized according to World Economic Situation and Prospects, 2017 classification. The developed country average is calculated using data from 32 countries that are predominantly European countries. Developing countries are composed of 47 countries except China.

Source: Euromonitor and Deloitte analysis.





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#### Thank You

We would like to thank
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