

E-Commerce in Turkey

2019 Market Size

April 2020

Project stakeholders

Project Consultant

Project Data Partners

Deloitte.

 **SimilarWeb**

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A woman with blonde hair is shown in profile, looking out of a window at night. The background outside the window is filled with colorful bokeh lights from city streets. In the foreground, a whiteboard is visible, covered with faint diagrams and several small, colorful sticky notes. The overall mood is contemplative and professional.

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, 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

B2C

C2C **

B2B

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

Estimation model



Monthly Visits

 SimilarWeb



Conversion Rate



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Discussions, press releases



Average Basket Size



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Discussions, press releases

Discussions / Updates / Modifications with Sector Representatives



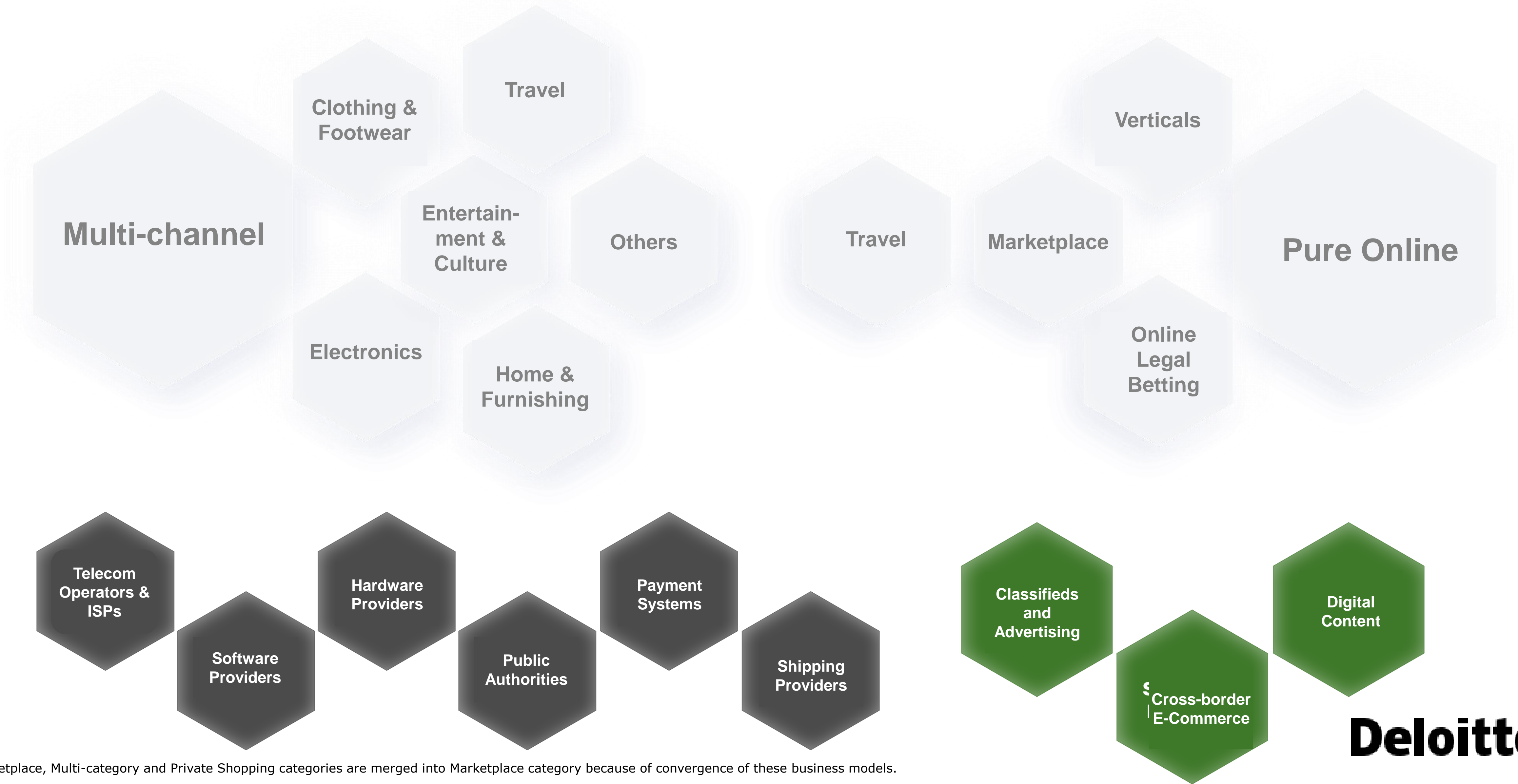
E-commerce Volume



E-Commerce ecosystem and scope

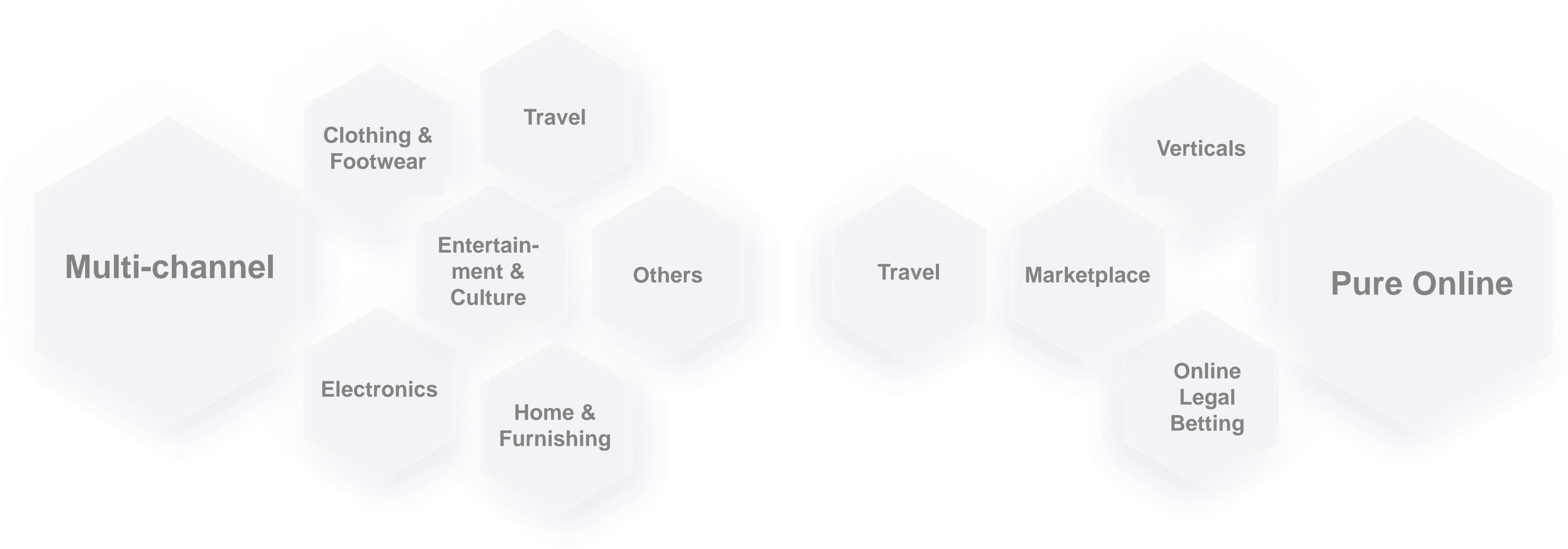


E-Commerce Ecosystem



*: Marketplace, Multi-category and Private Shopping categories are merged into Marketplace category because of convergence of these business models.

Scope of estimation model



Scope of estimation model

 Sample Sites

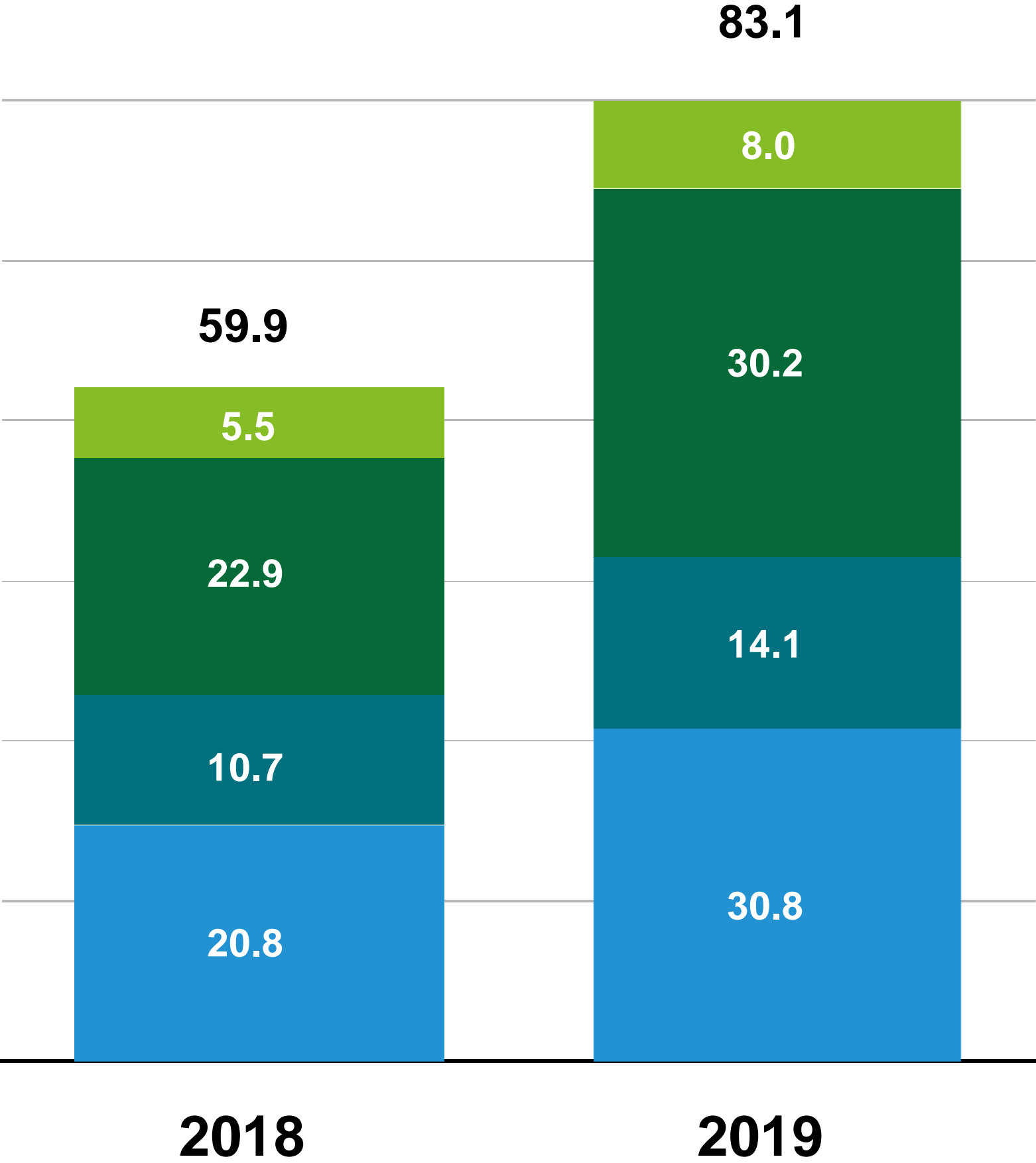




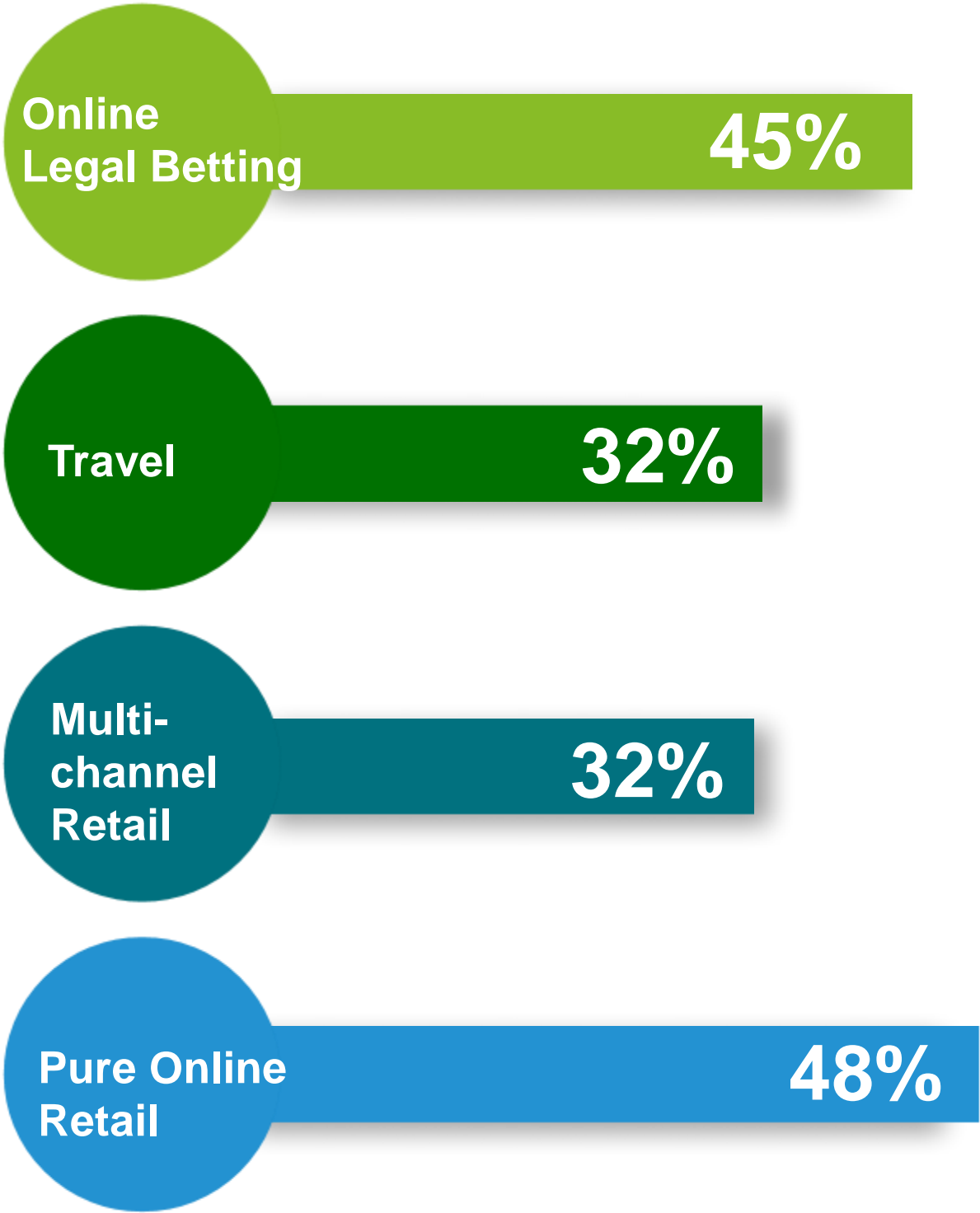
E-Commerce market size

E-commerce market size in Turkey (billion TRY)

Annual Growth
39%

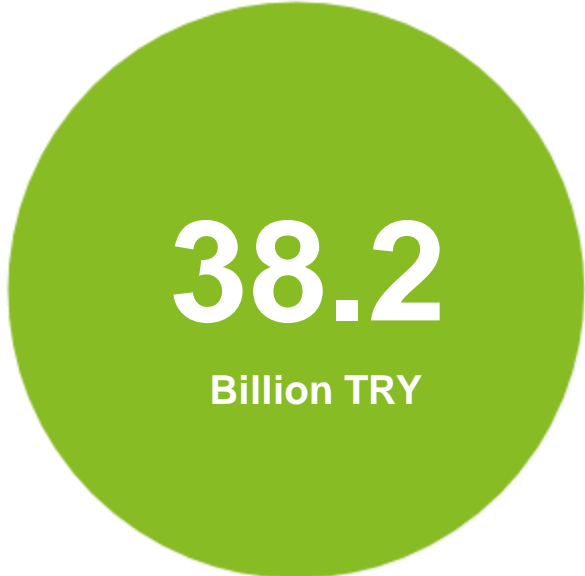


2018 - 2019
Annual Growth

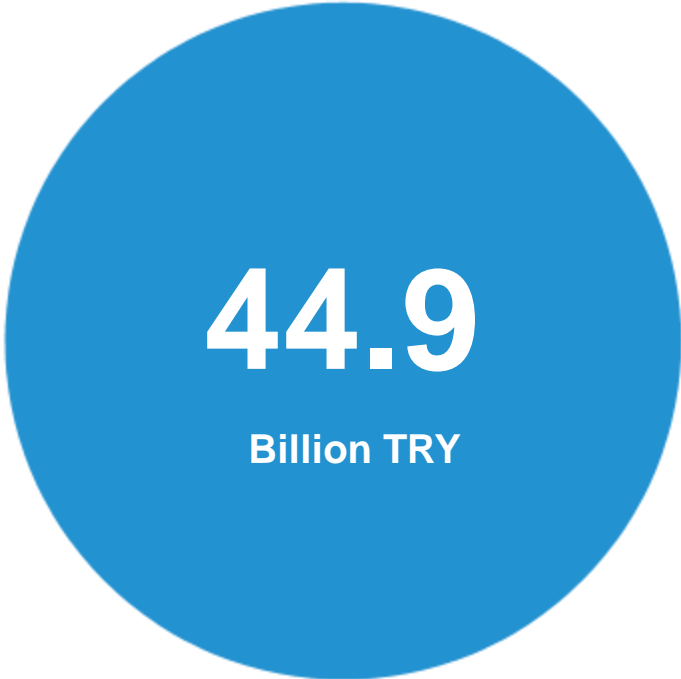


Figures exclude VAT

2019 Market Size



Non-Retail

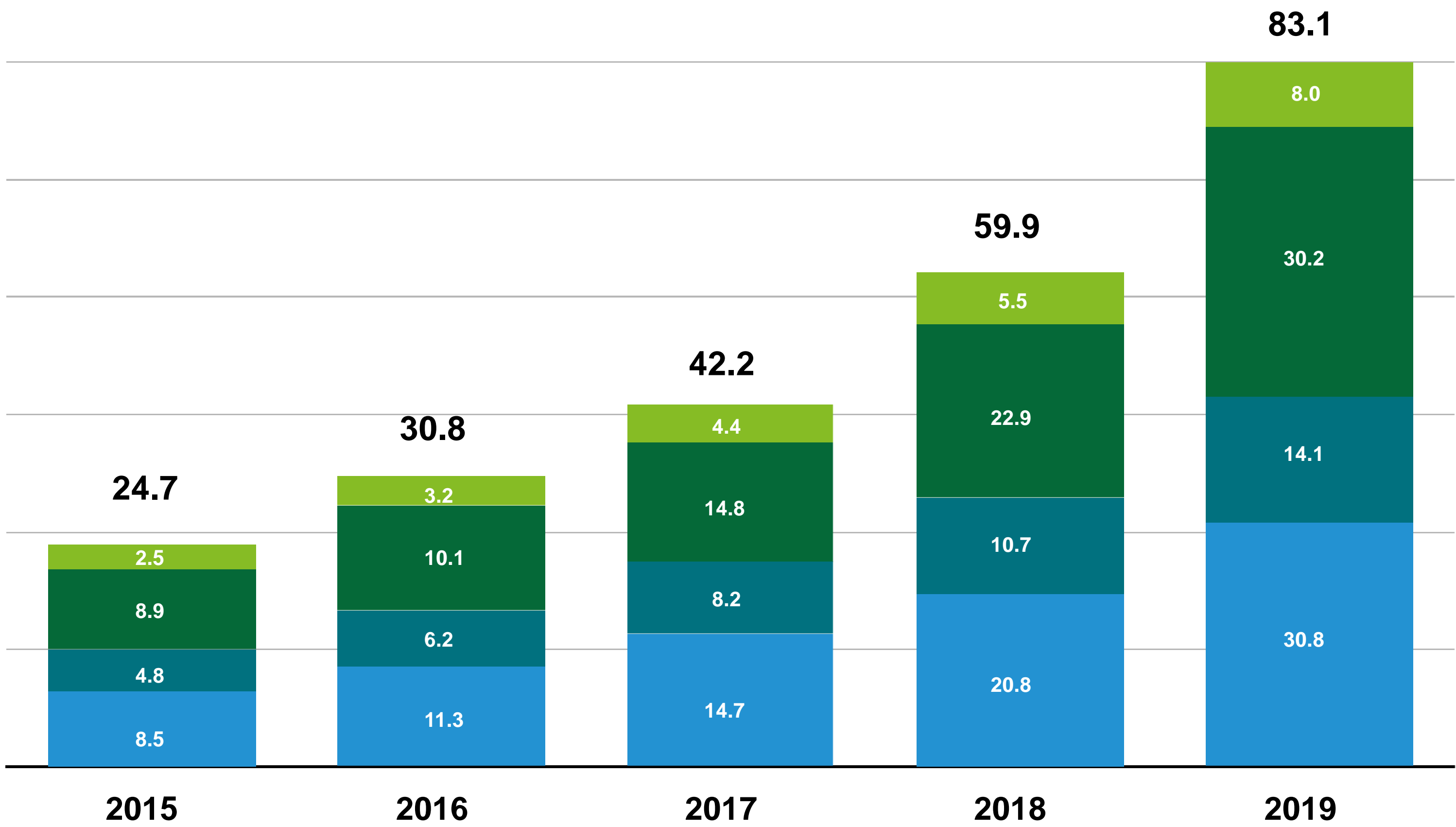


Retail

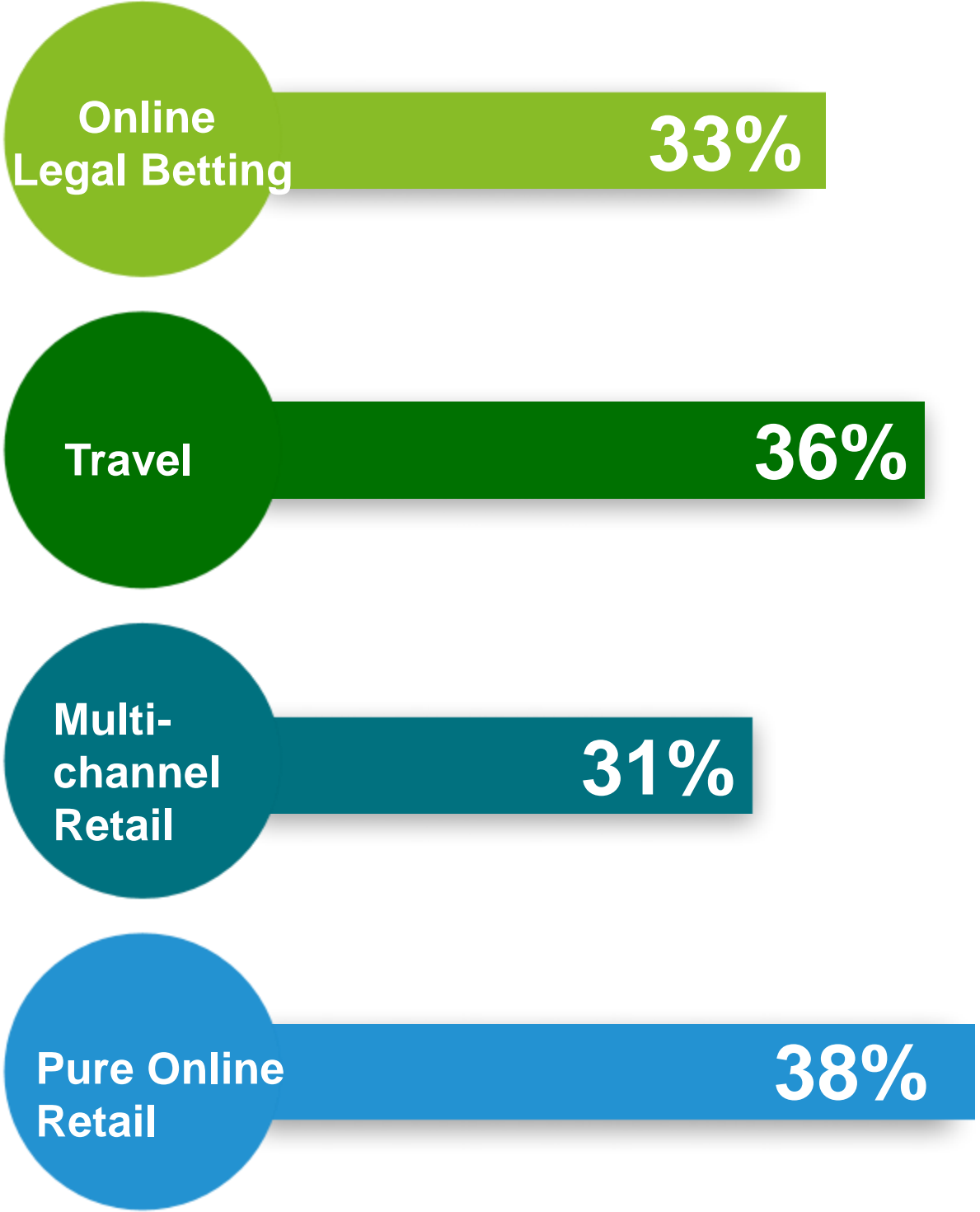
E-Commerce market size in Turkey (billion TRY)



2015 - 2019 Average Annual Growth
35%



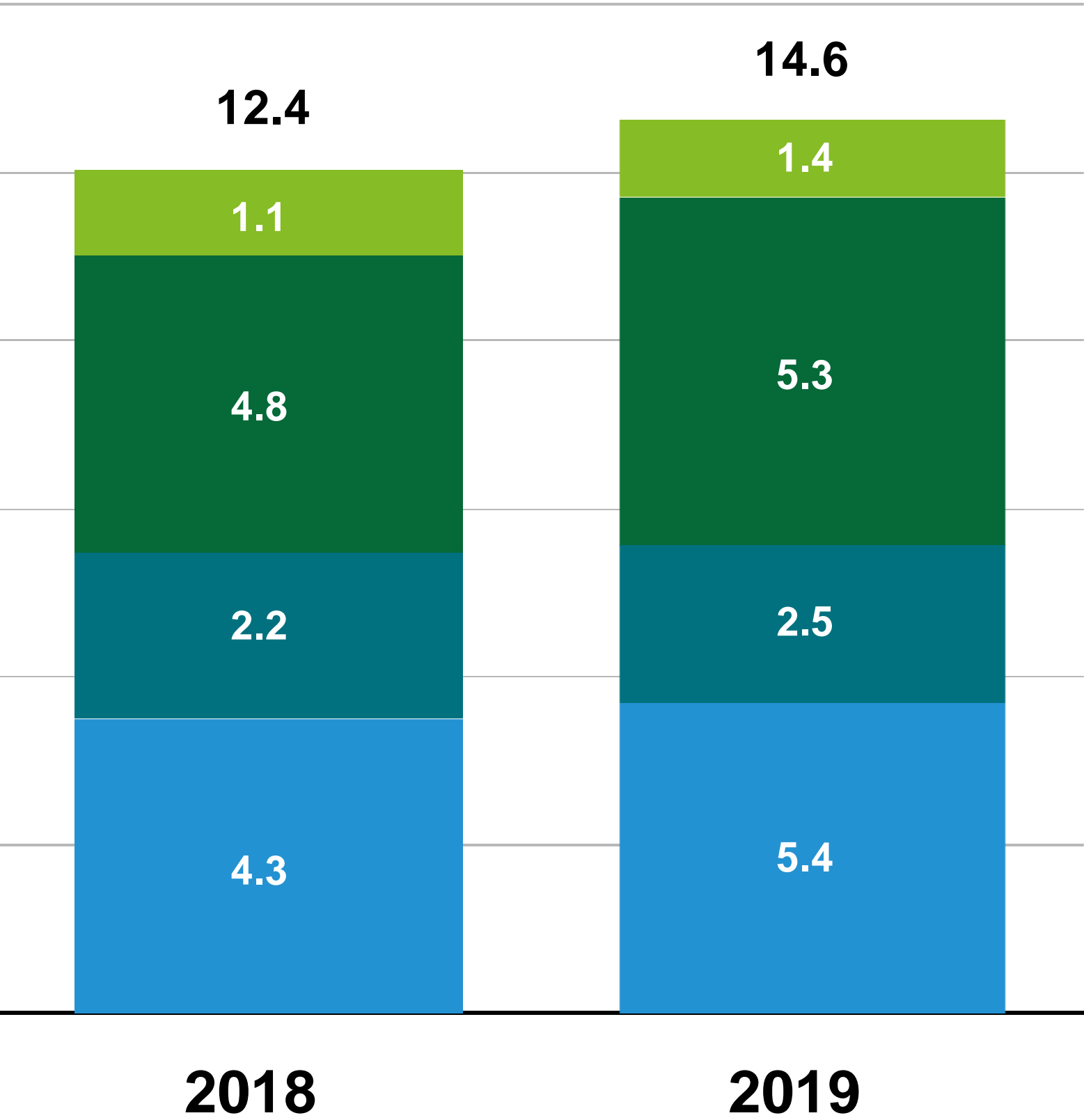
2015 - 2019
Average Annual Growth



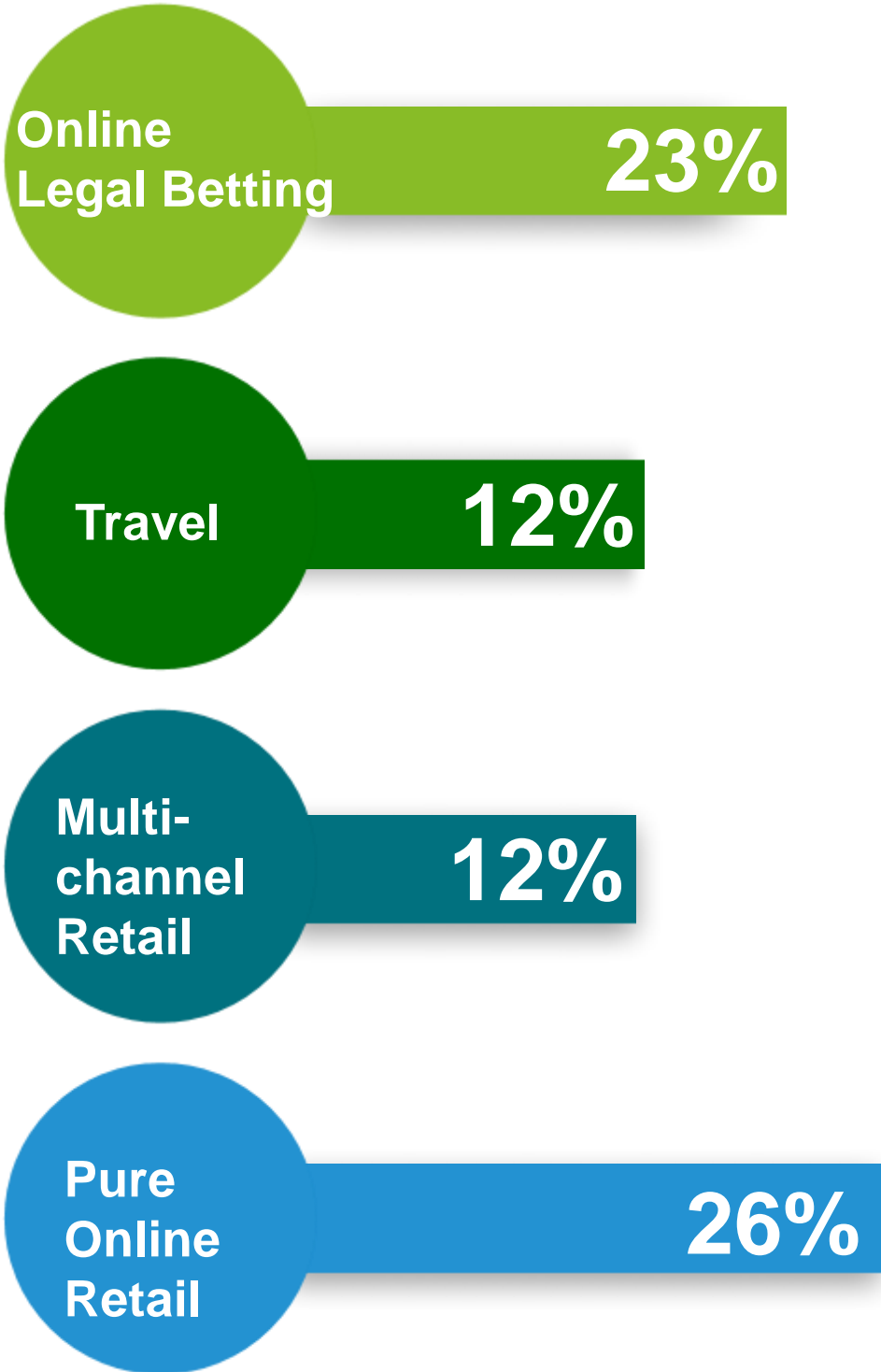
Figures exclude VAT

E-Commerce market size in Turkey (billion USD)

Annual Growth
18%

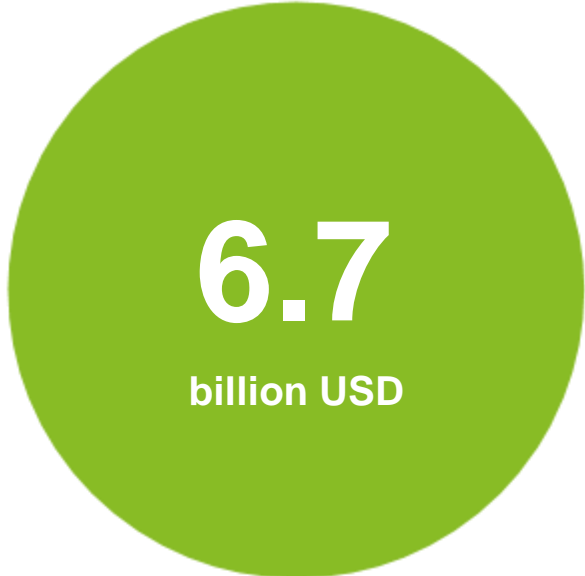


2018 - 2019
Annual Growth

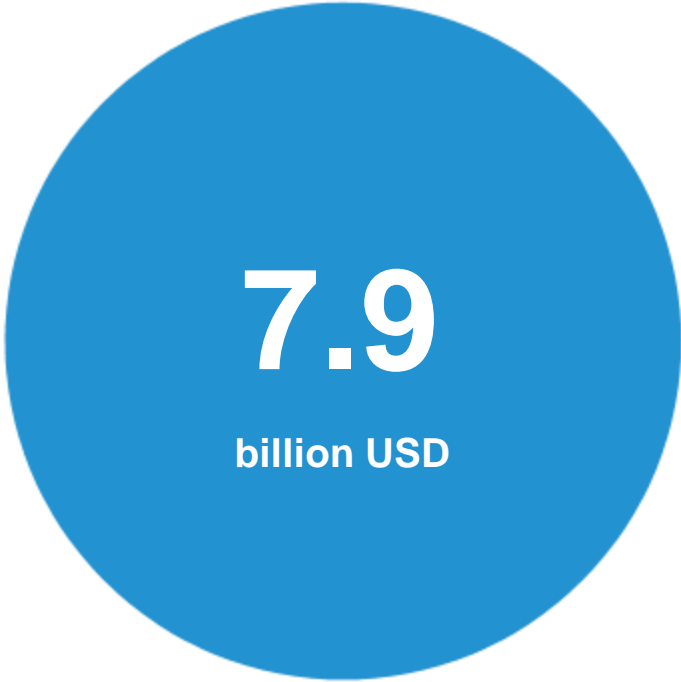


Figures exclude VAT

2019 Market Size



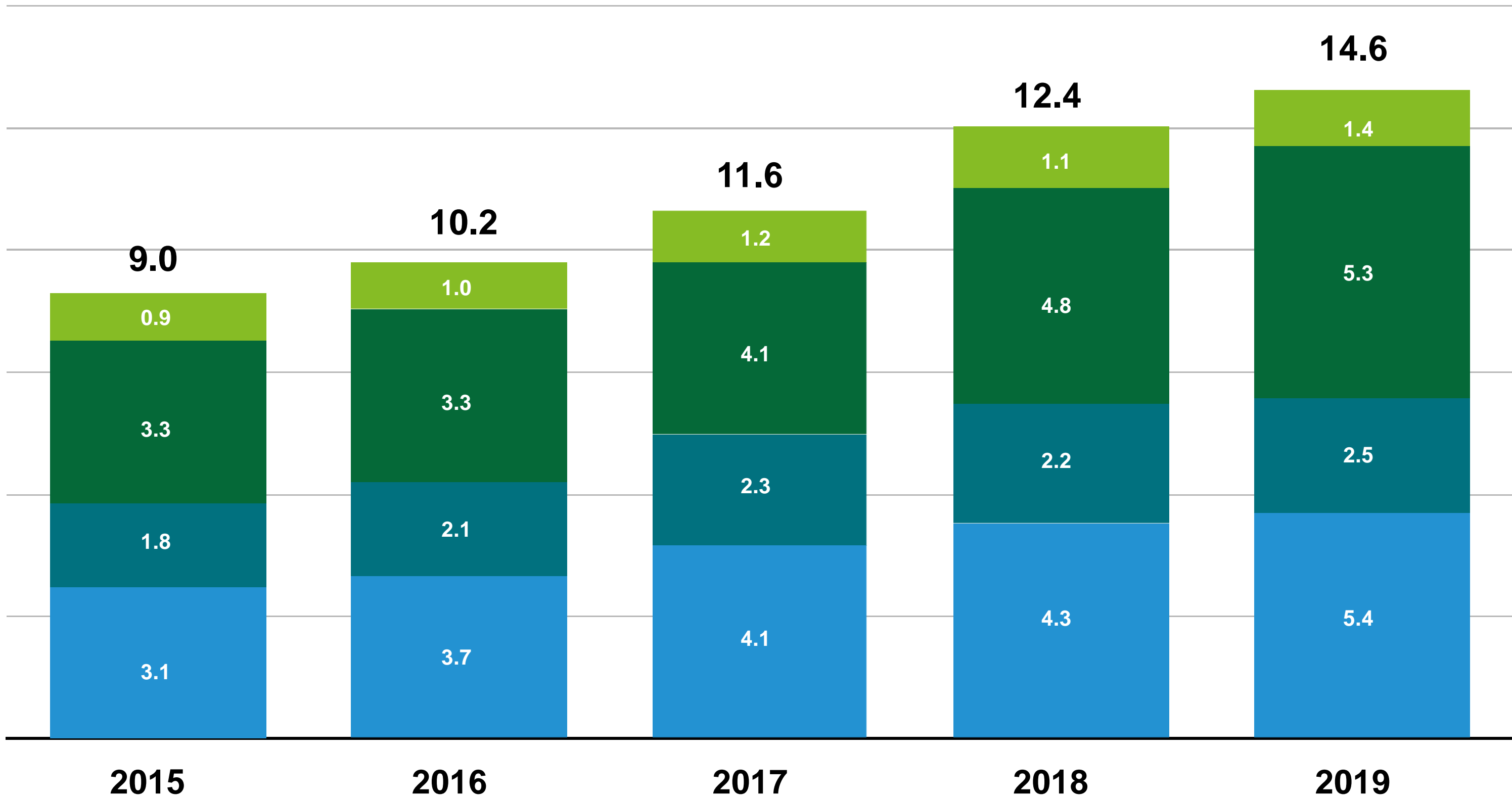
Non-Retail



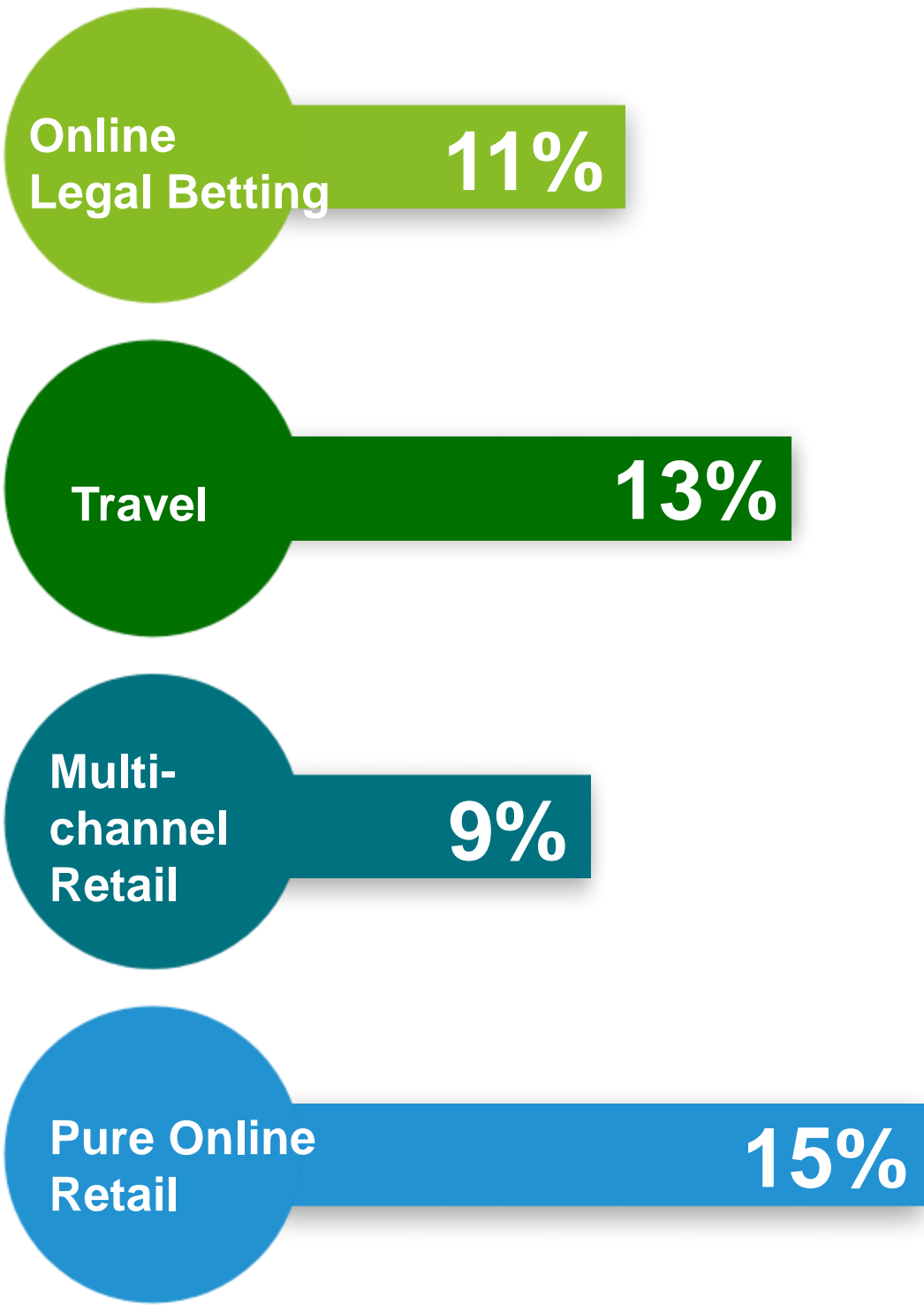
Retail

E-Commerce market size in Turkey (billion USD)

2015 - 2019 Average Annual Growth
13%



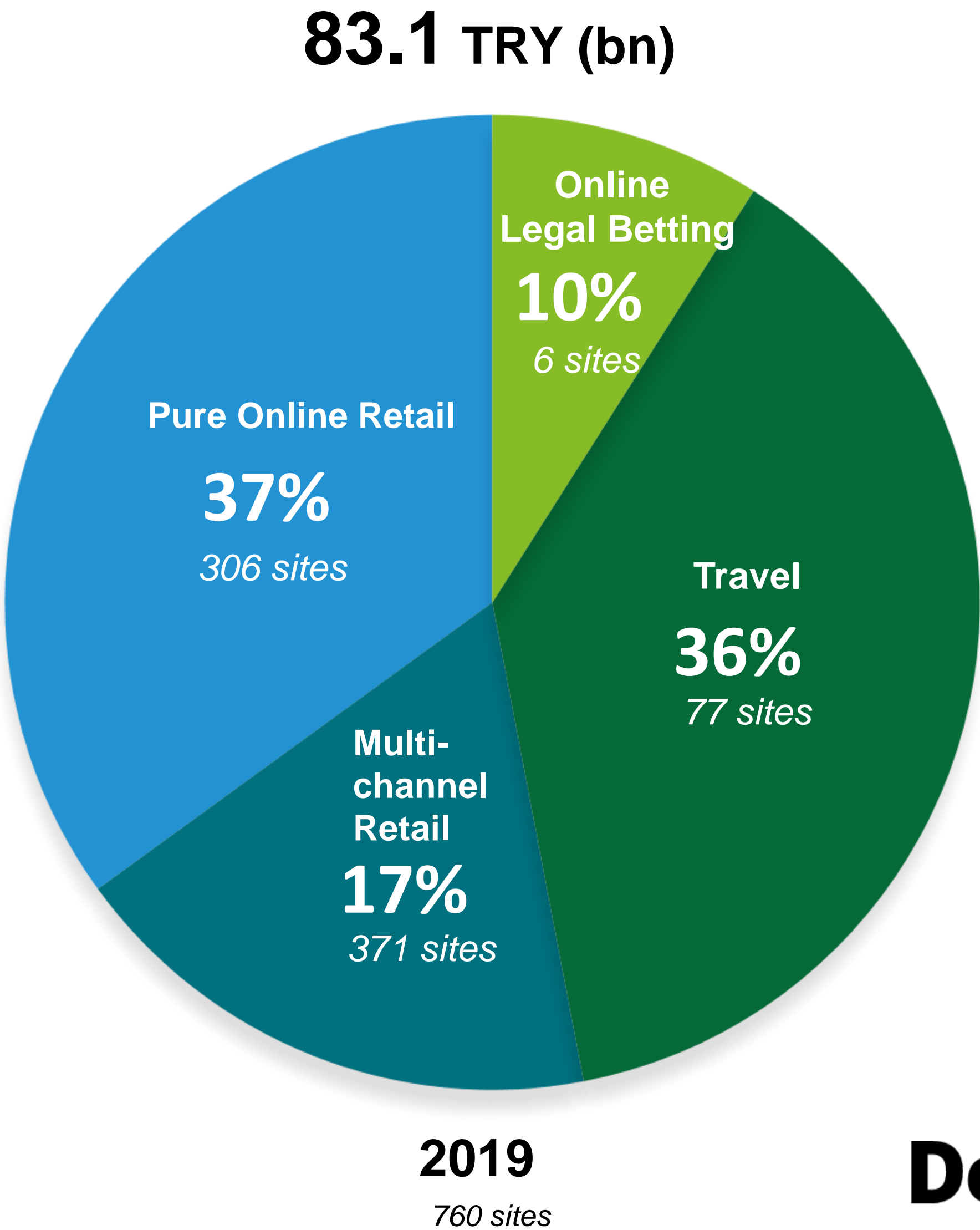
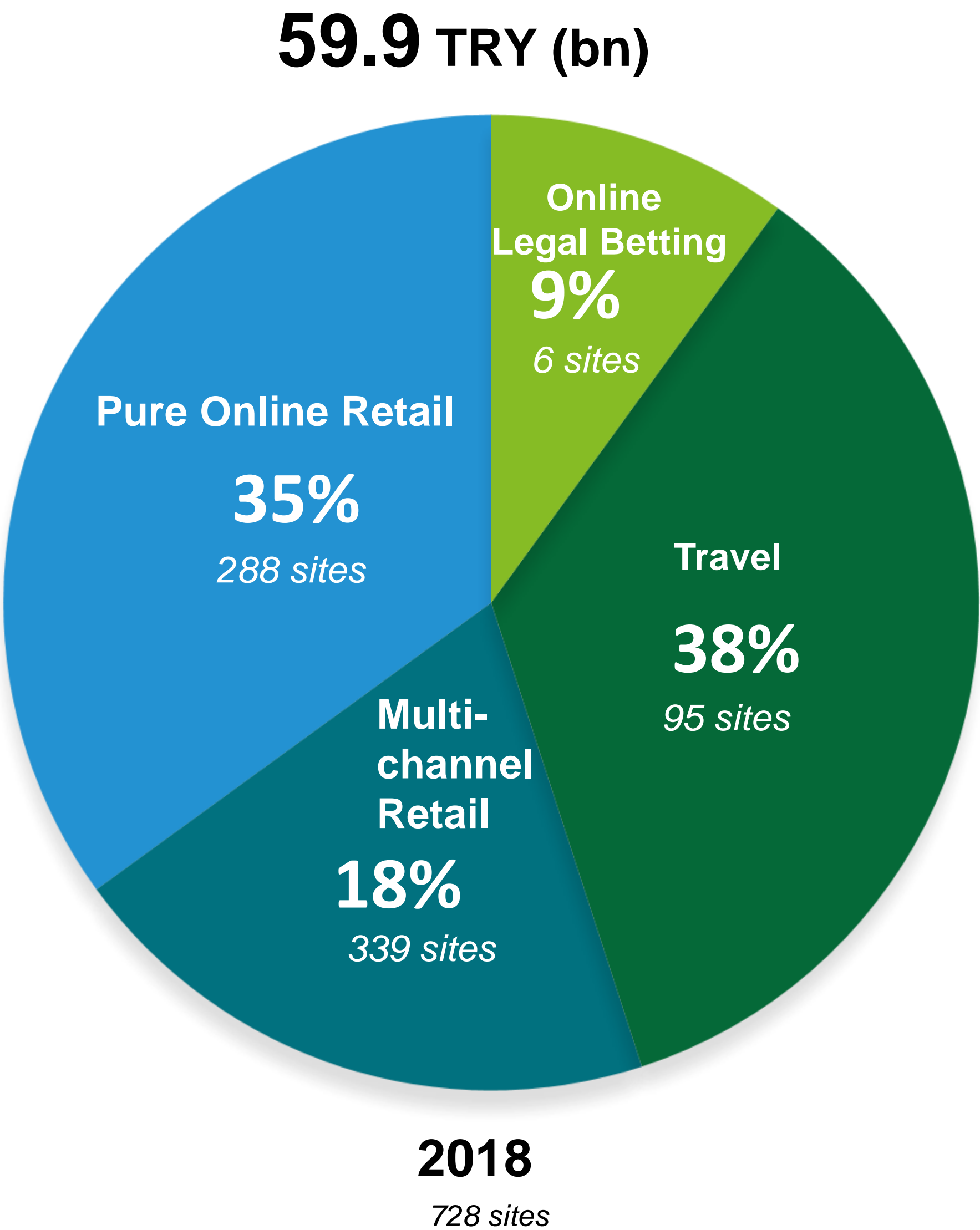
2015 - 2019
Average Annual Growth



Figures exclude VAT

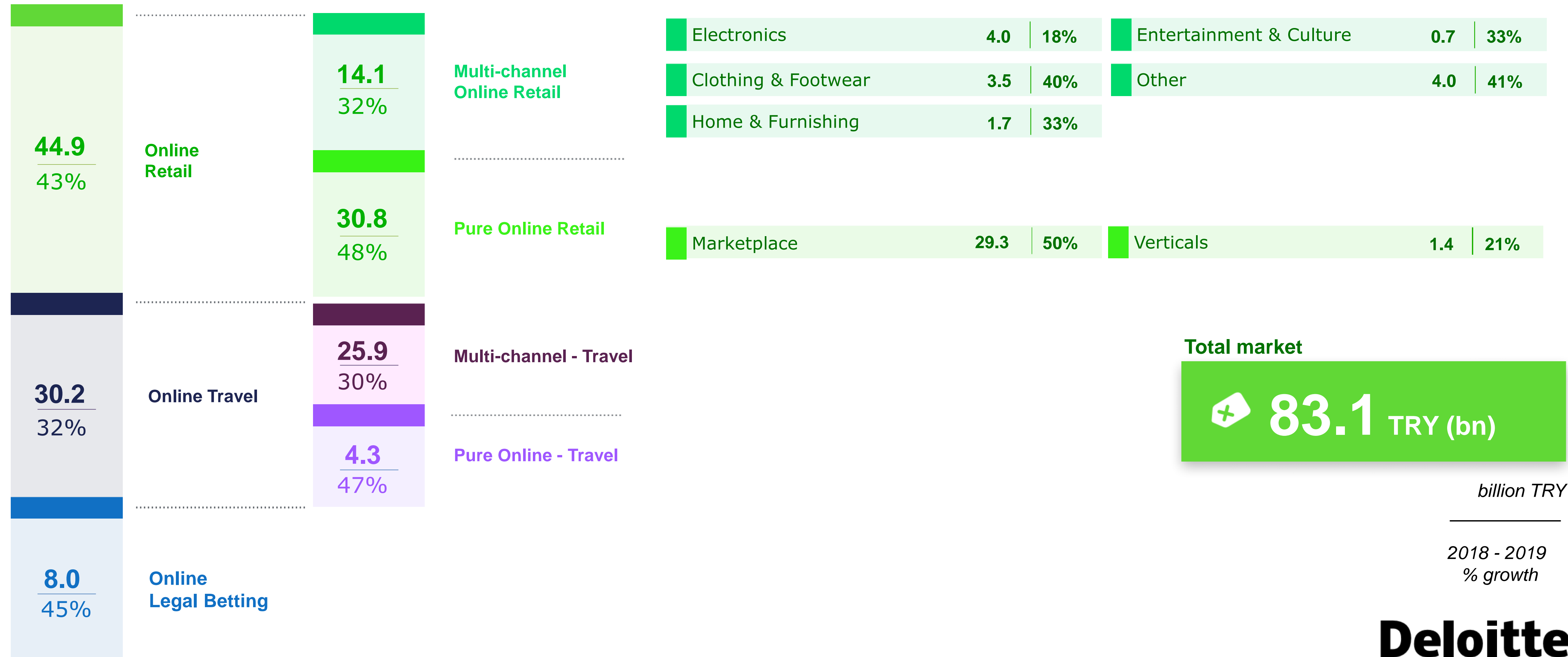
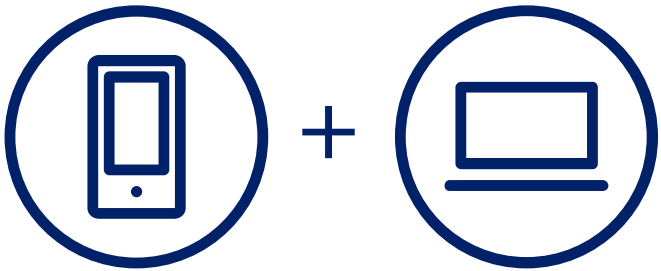
E-Commerce market size in Turkey (billion TRY)

Category mix and number of sites



E-Commerce market size in Turkey by category

(billion TRY)

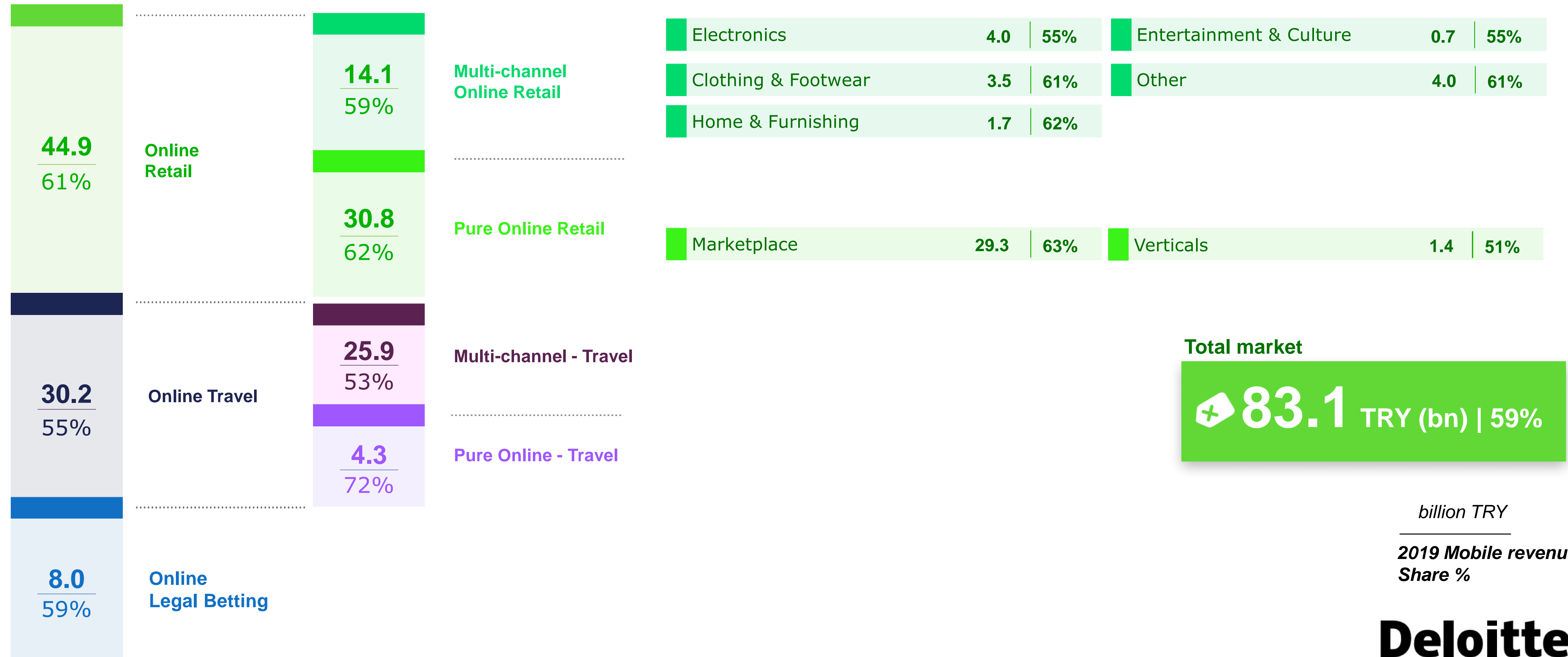
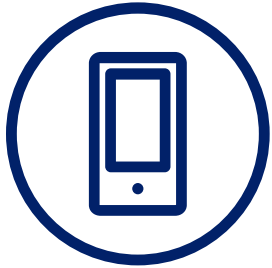


Figures exclude VAT. Totals may not add due to rounding

Mobile revenue* at E-commerce market size in Turkey

by category

(bn TRY)

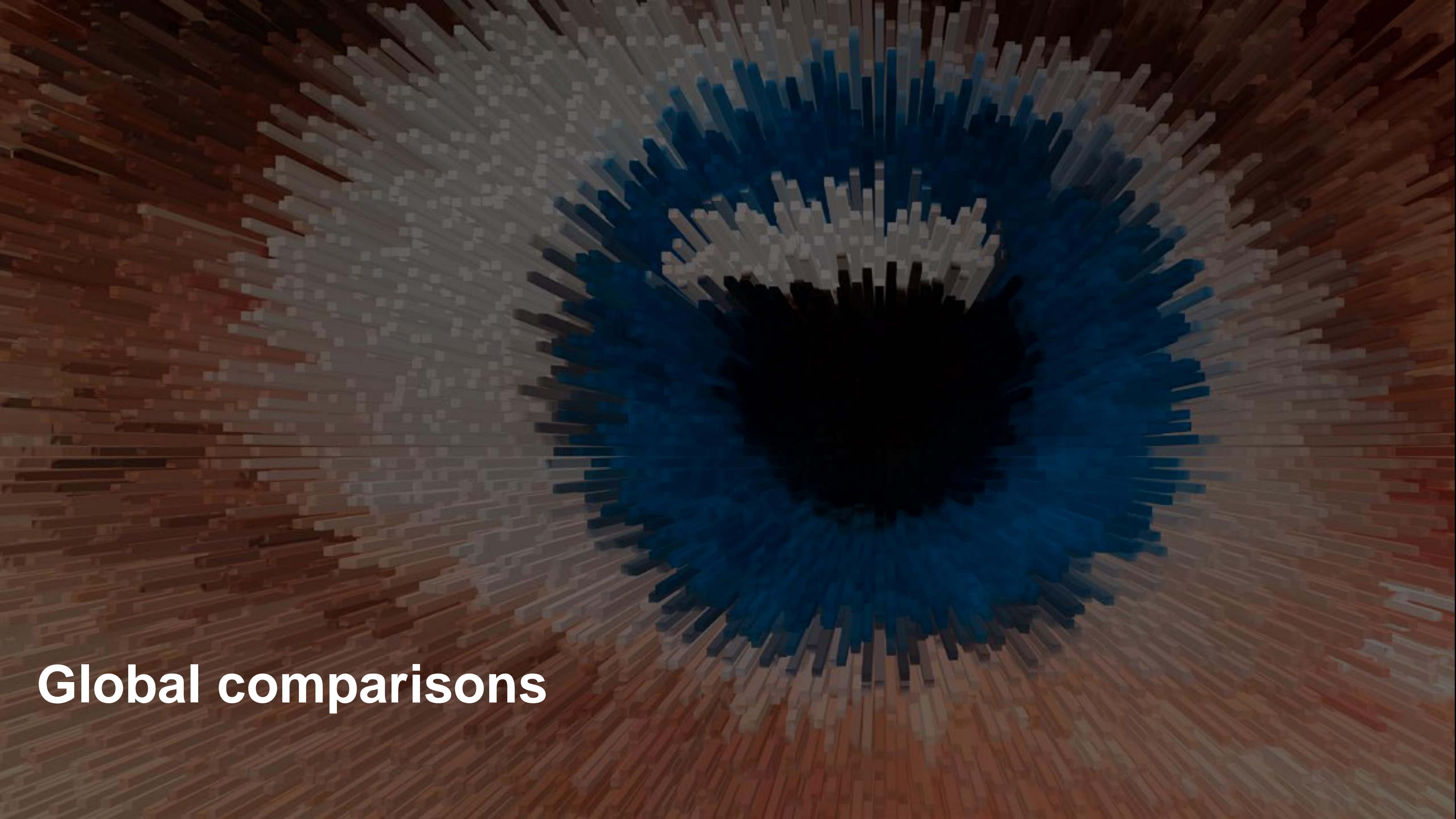


*: Sum of mobile web and application revenues included.
Figures exclude VAT. Totals may not add due to rounding

billion TRY

2019 Mobile revenue
Share %

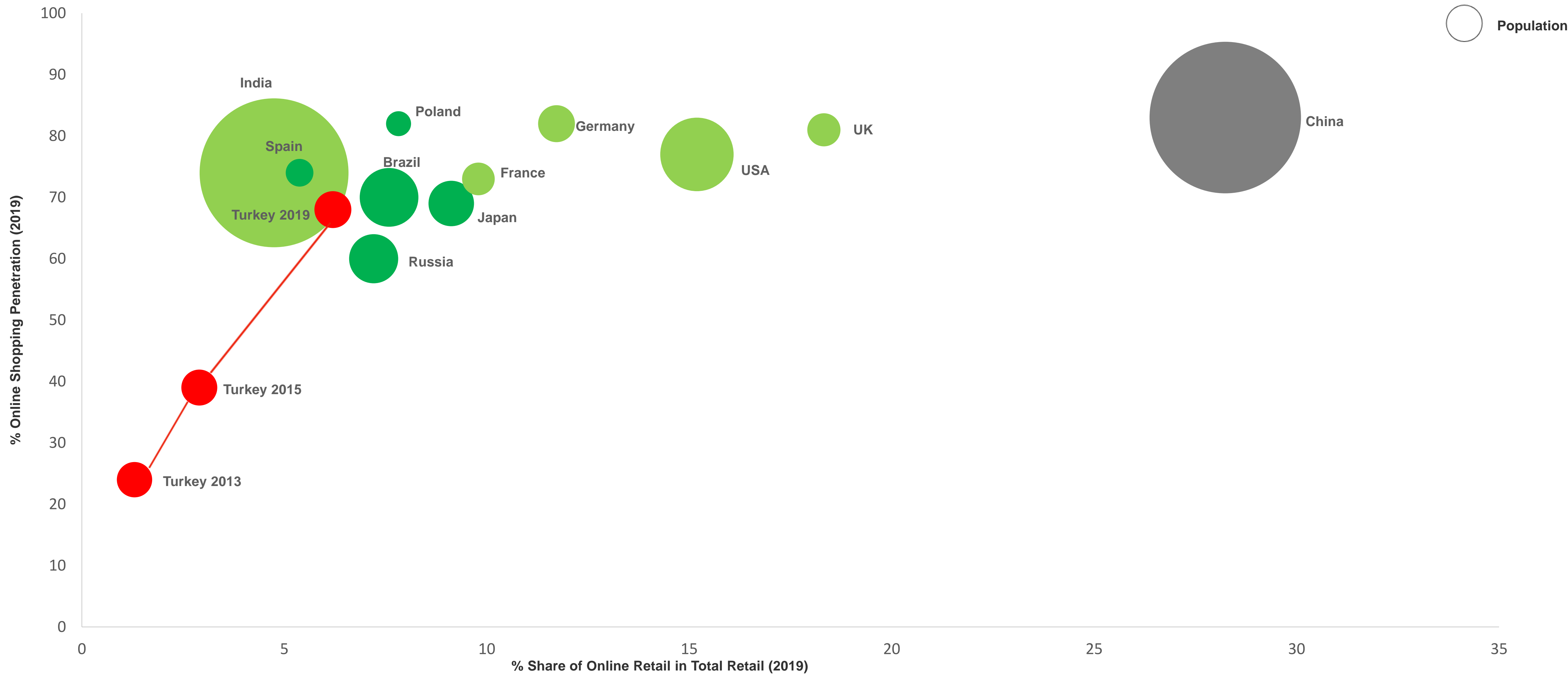




Global comparisons

Country	Online Retail / Total Retail	Internet Penetration	Mobile Broadband Penetration	Online Shoppers	Mobile Shoppers	Income per capita \$ K	Population (mn)
UK	18.3%	40.2%	101.1%	81%	50%	\$46.8K	66.8 mn
USA	15.2	34.3	149.6	77	49	65.1	329.2
Germany	11.7	41.7	85.0	82	34	53.5	82.9
France	9.8	43.6	90.7	73	31	47.2	64.8
Japan	9.1	32.0	176.6	69	38	45.5	126.1
Spain	5.4	32.3	101.3	74	45	41.5	46.6
China	28.2	32.6	109.8	83	83	19.5	1,400.1
Poland	7.8	19.7	111.2	82	42	33.8	37.9
India	4.7	1.5	48.1	74	67	8.3	1,351.7
Brazil	7.6	15.6	90.6	70	50	16.4	209.9
Russia	7.2	23.5	94.7	60	36	29.6	146.7
Turkey 2018	5.3	16.3	74.5	67	50	27.9	82.0
Turkey 2019	6.2	17.2	76.8	68	51	28.2	83.1

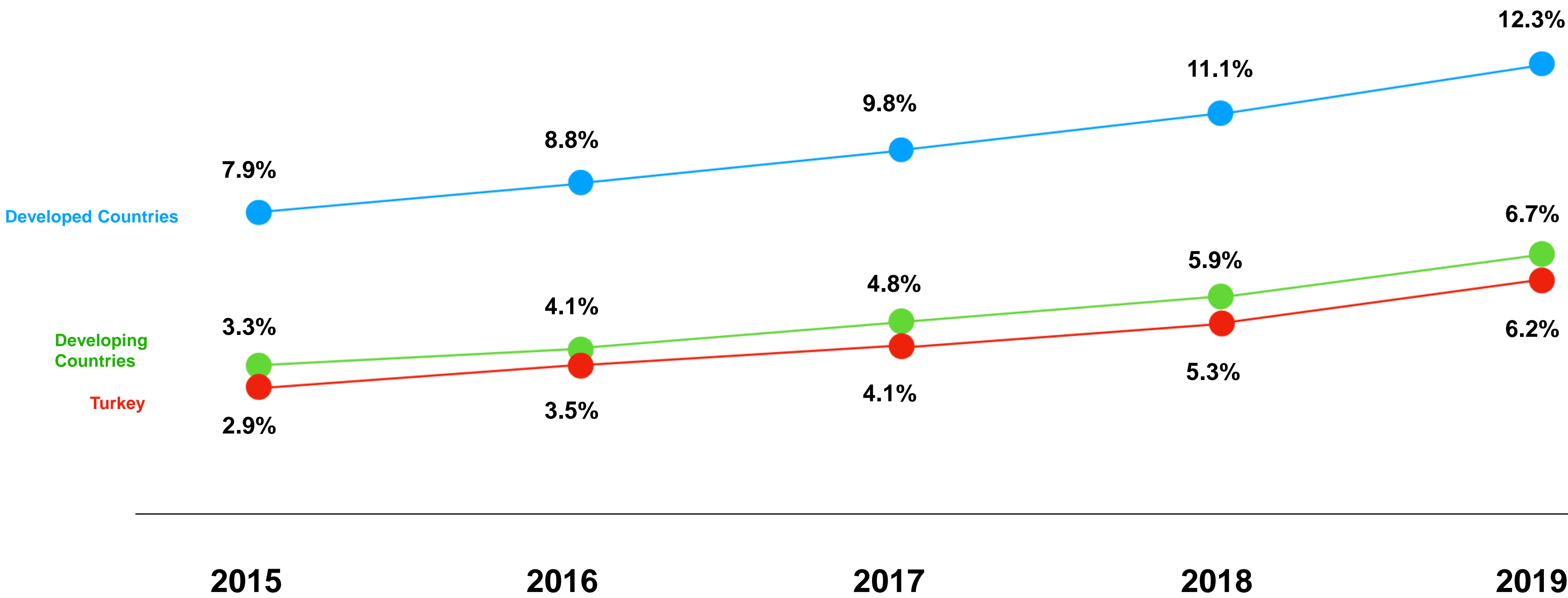
E-Commerce Comparison (2019)



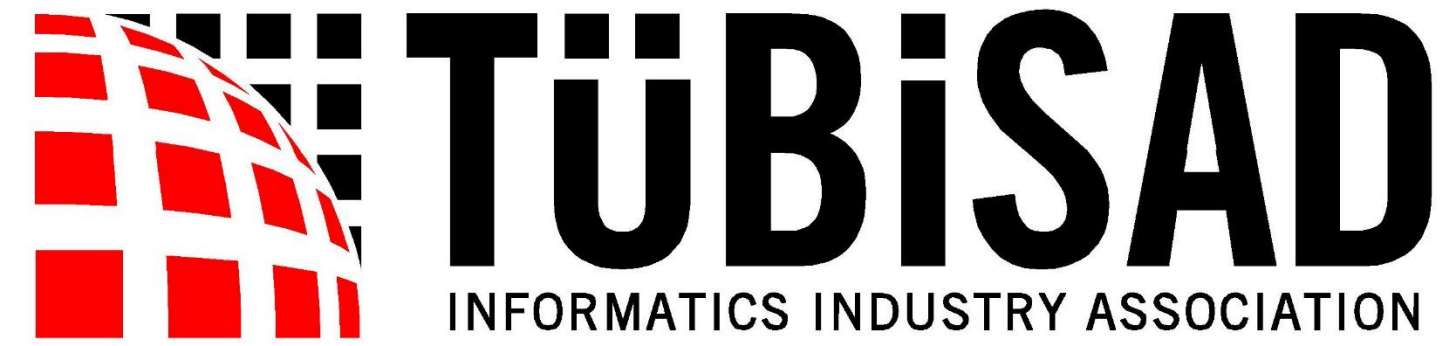
Online retail/total retail ratio is calculated by dividing retail e-commerce size used in this study over total retail sector size in Turkey estimated that Euromonitor.
Country groups are organized according to World Economic Situation and Prospects, 2017 classification. *The developed country average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

E-Commerce Comparison (2015 - 2019)

% of Online Retail in Total Retail (2015-2019)



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.
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.
Sources: Euromonitor, IMF, GlobalWebIndex and Deloitte analysis.



Deloitte.



Thank You

We would like to thank
Deloitte Consulting, SimilarWeb, Inveon
and sector companies for their valuable contributions.