

E-Commerce in Turkey
2018 Market Size
April 2019

Project stakeholders

**Project
Consultant**

Deloitte.

**Project Data
Partners**

 **SimilarWeb**

iNVEON

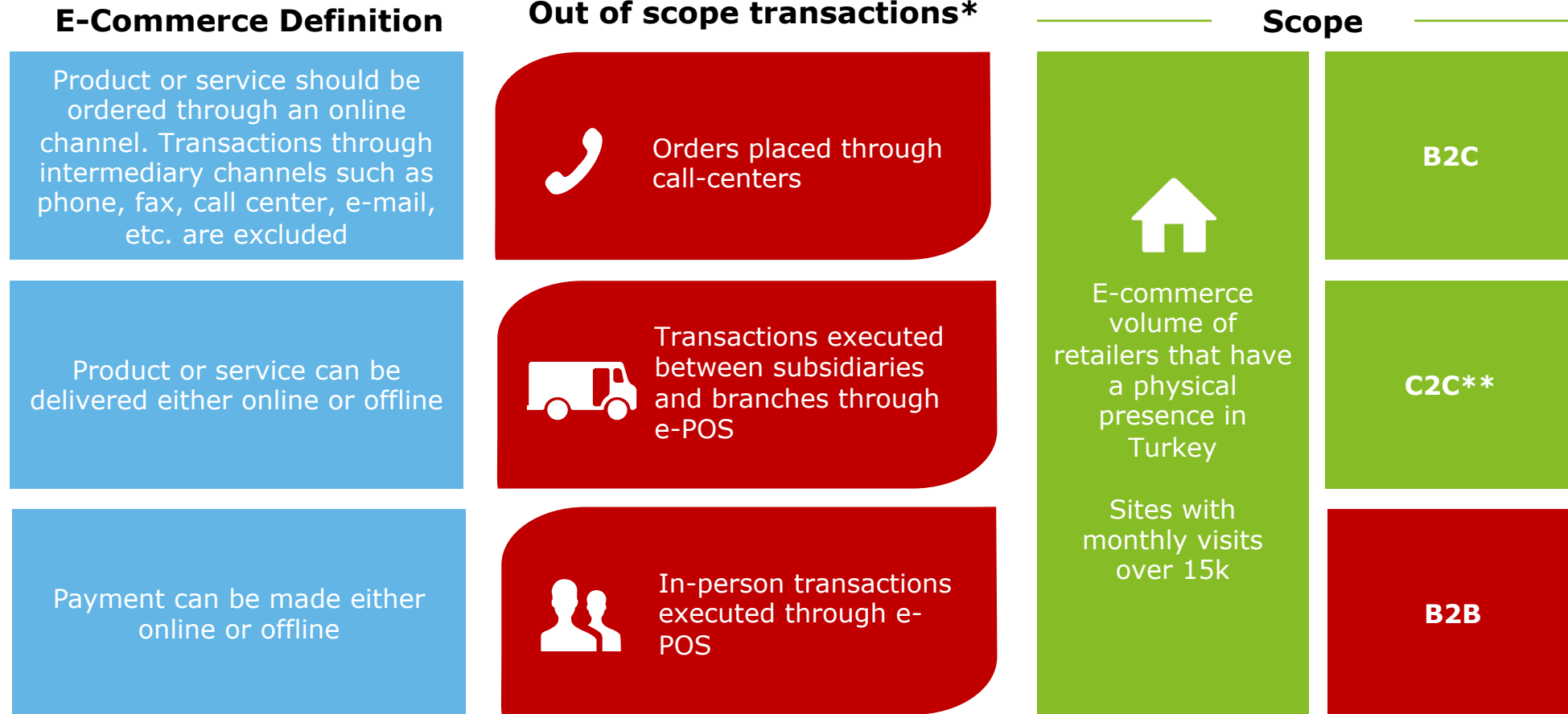
 **etid**
Elektronik Ticaret İşletmecileri Derneği



E-commerce definition and estimation model



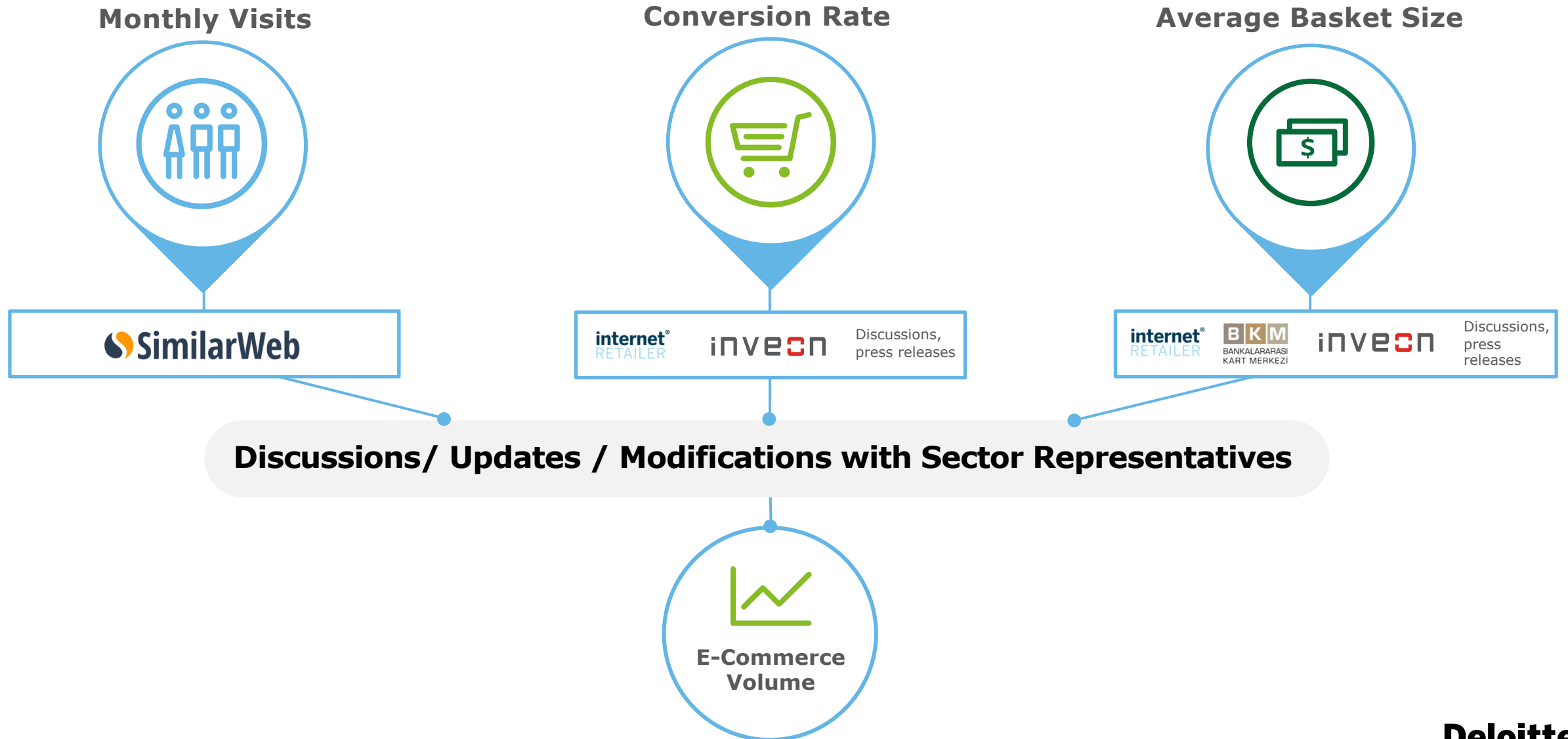
E-Commerce definition and scope



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

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

Estimation model

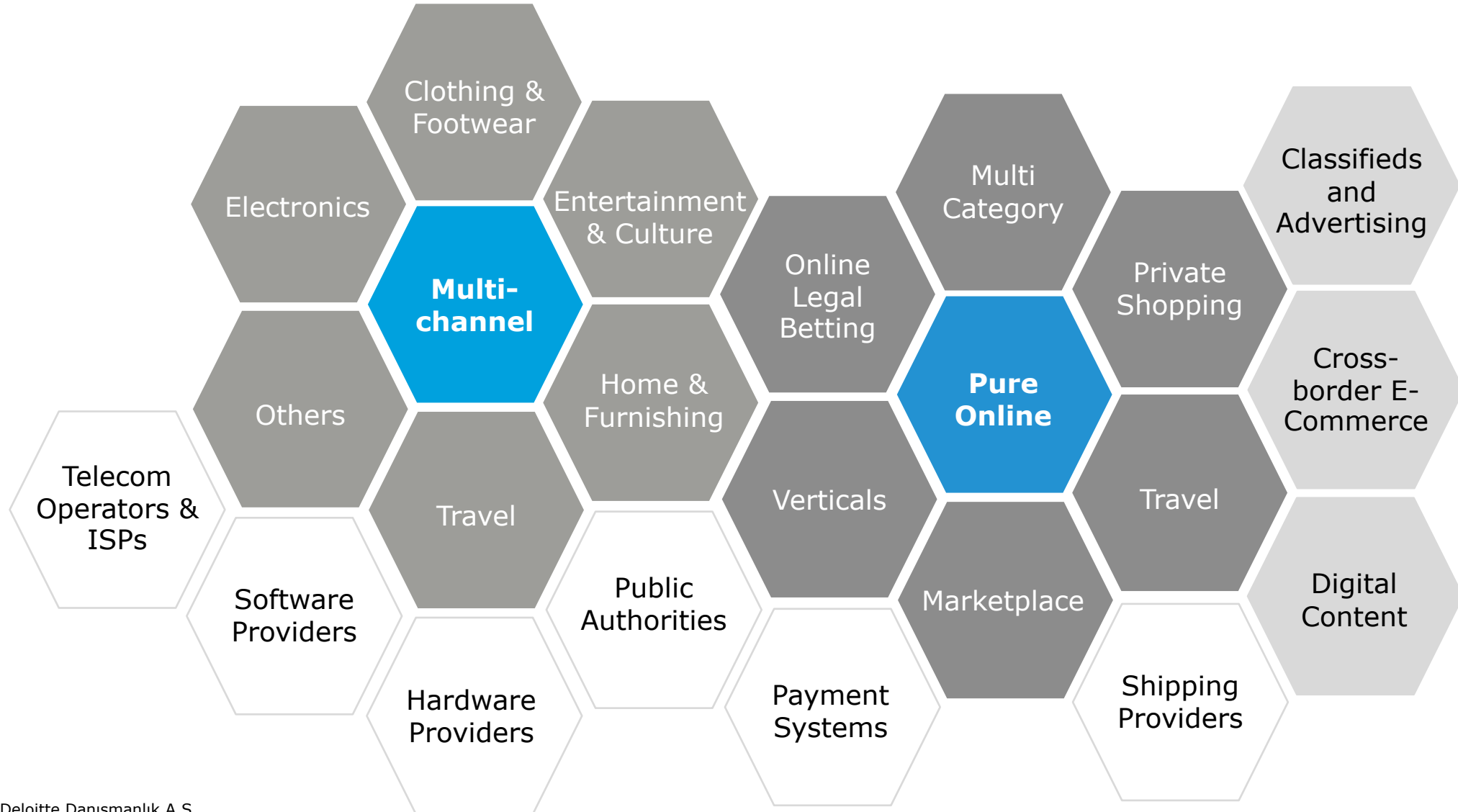




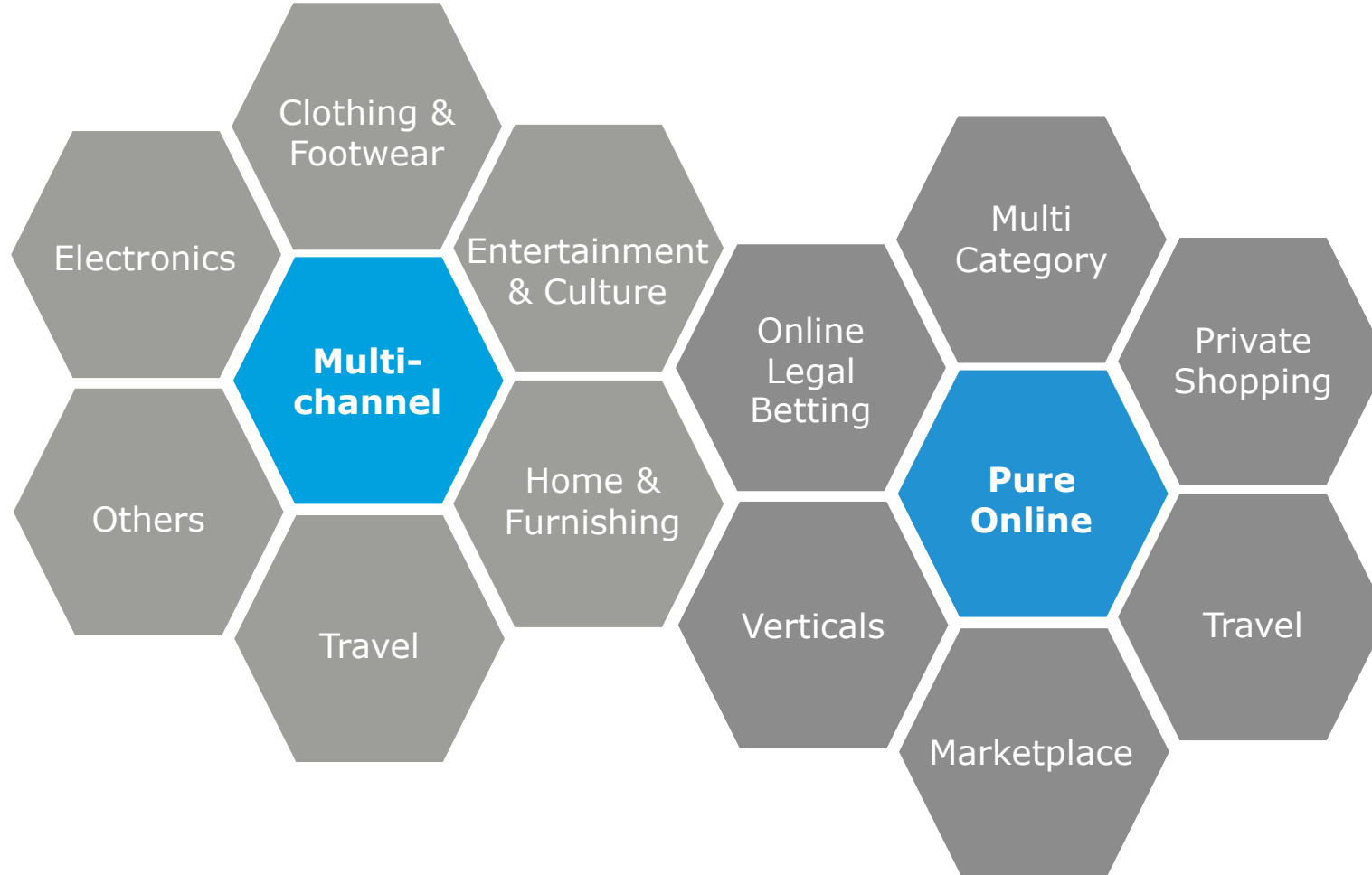
E-Commerce ecosystem and scope



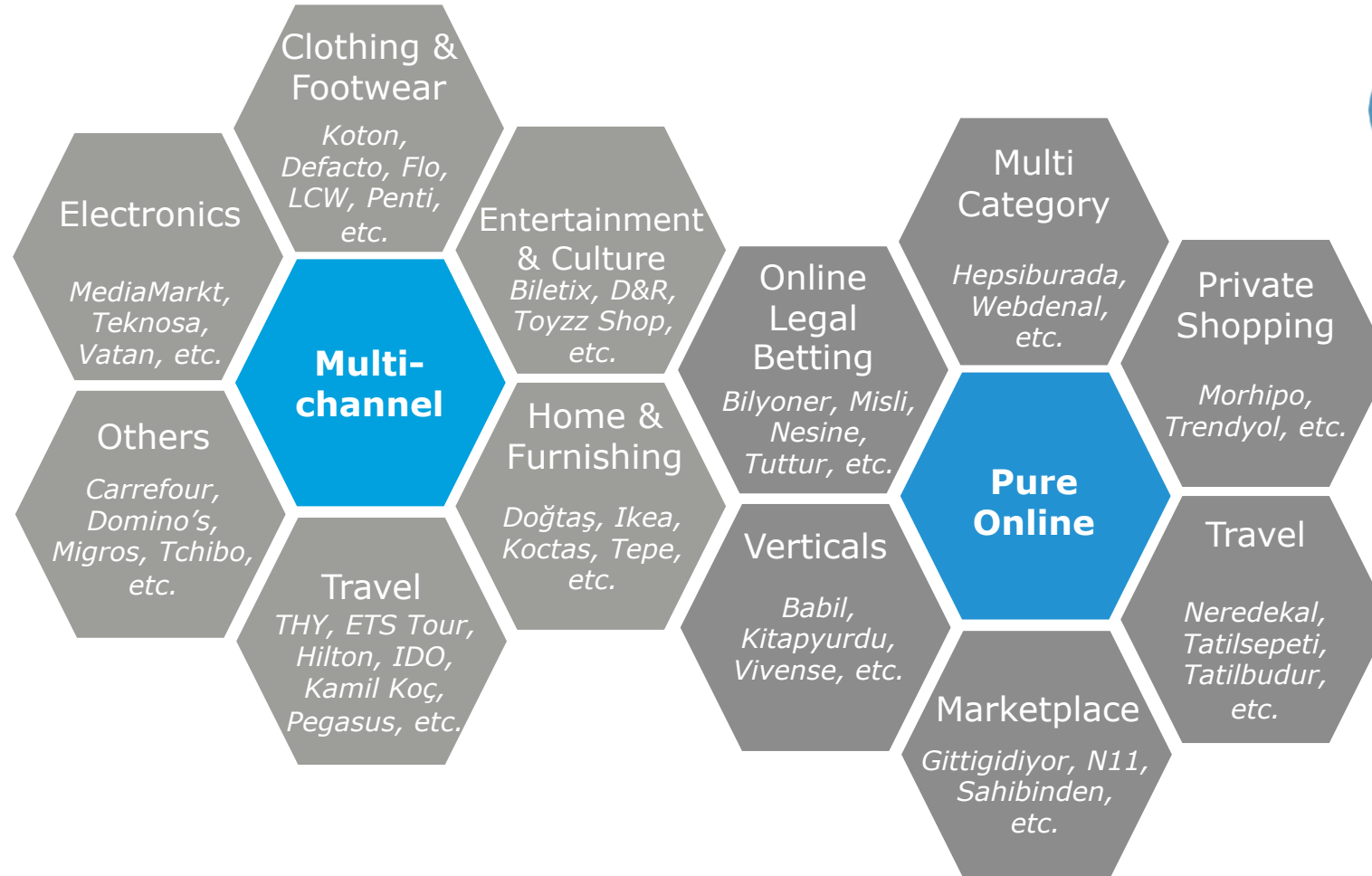
E-Commerce ecosystem



Scope of estimation model



Scope of estimation model

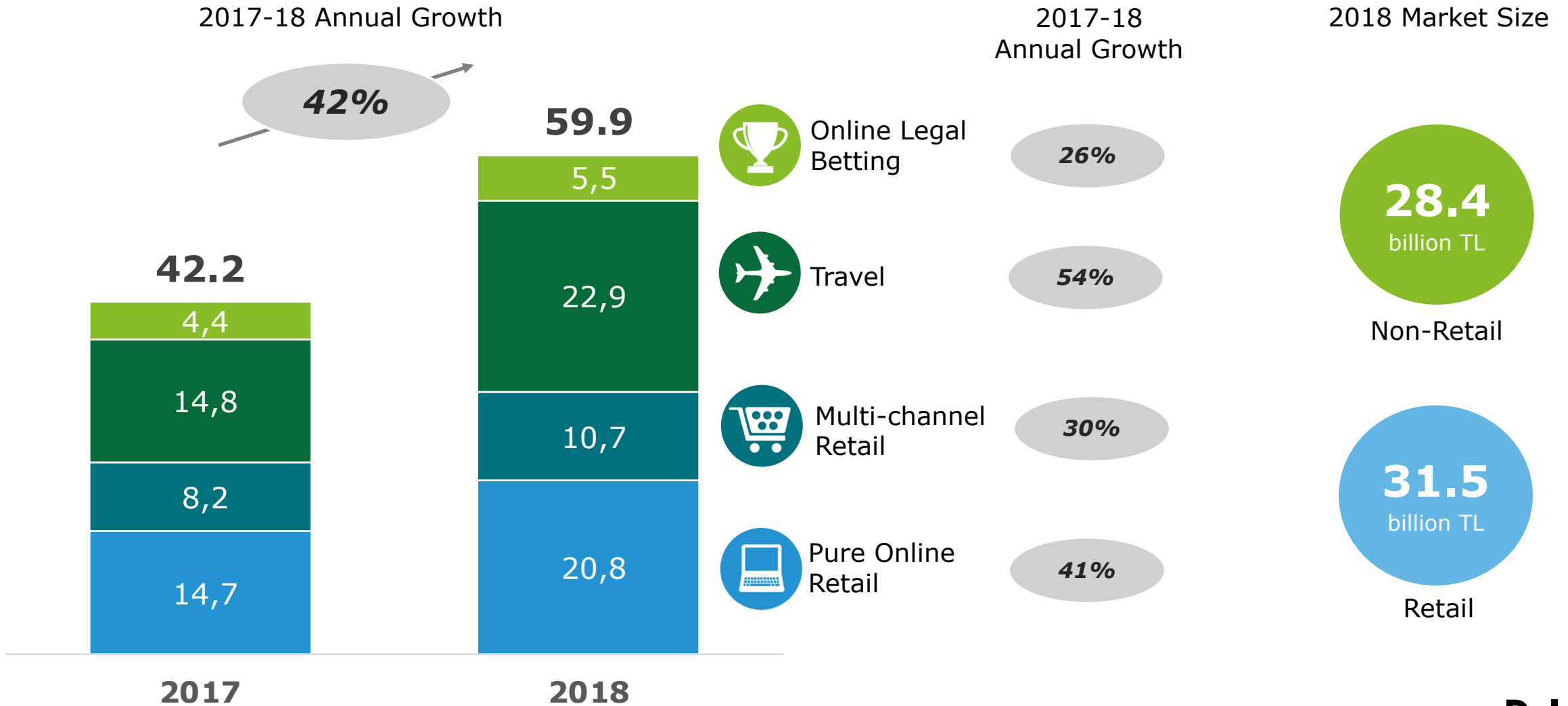


Sample sites

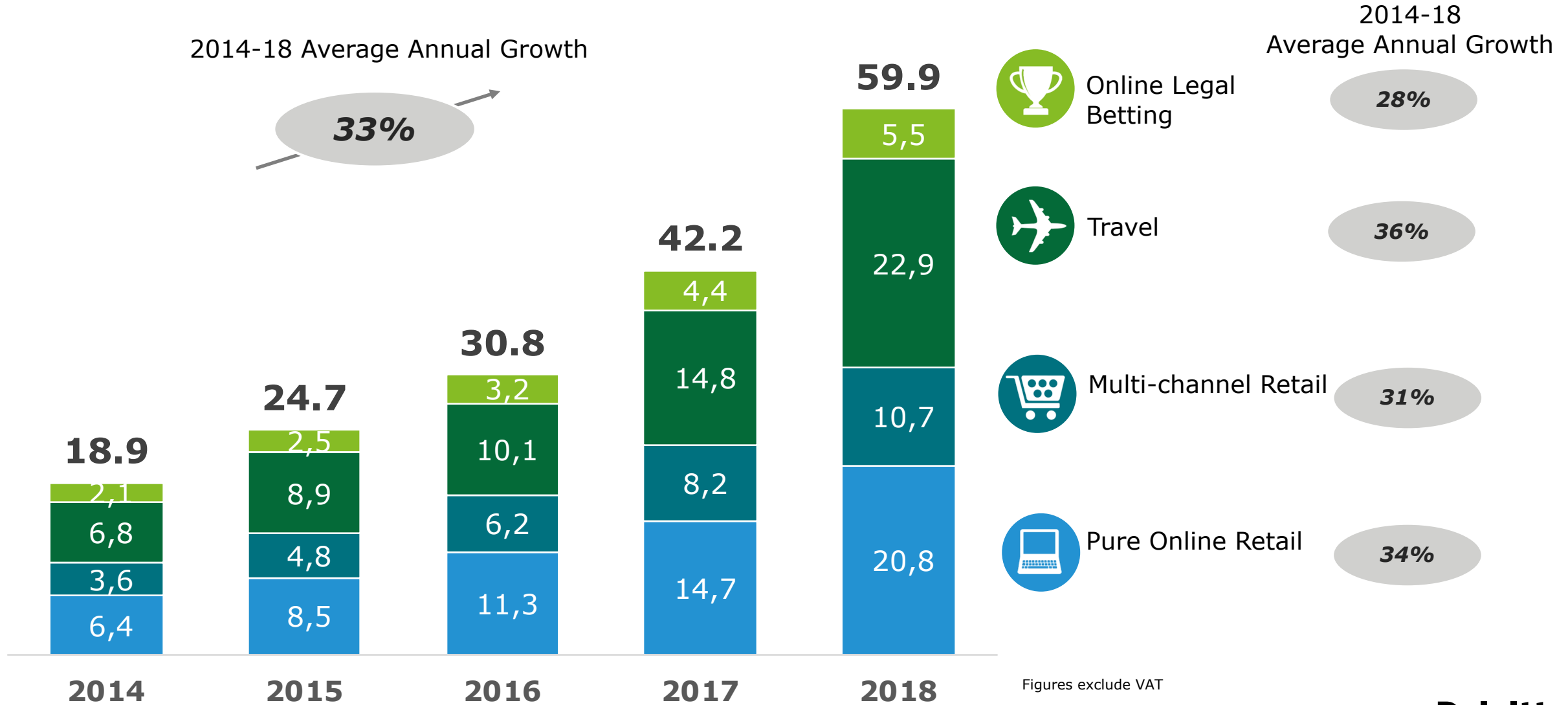


E-Commerce market size

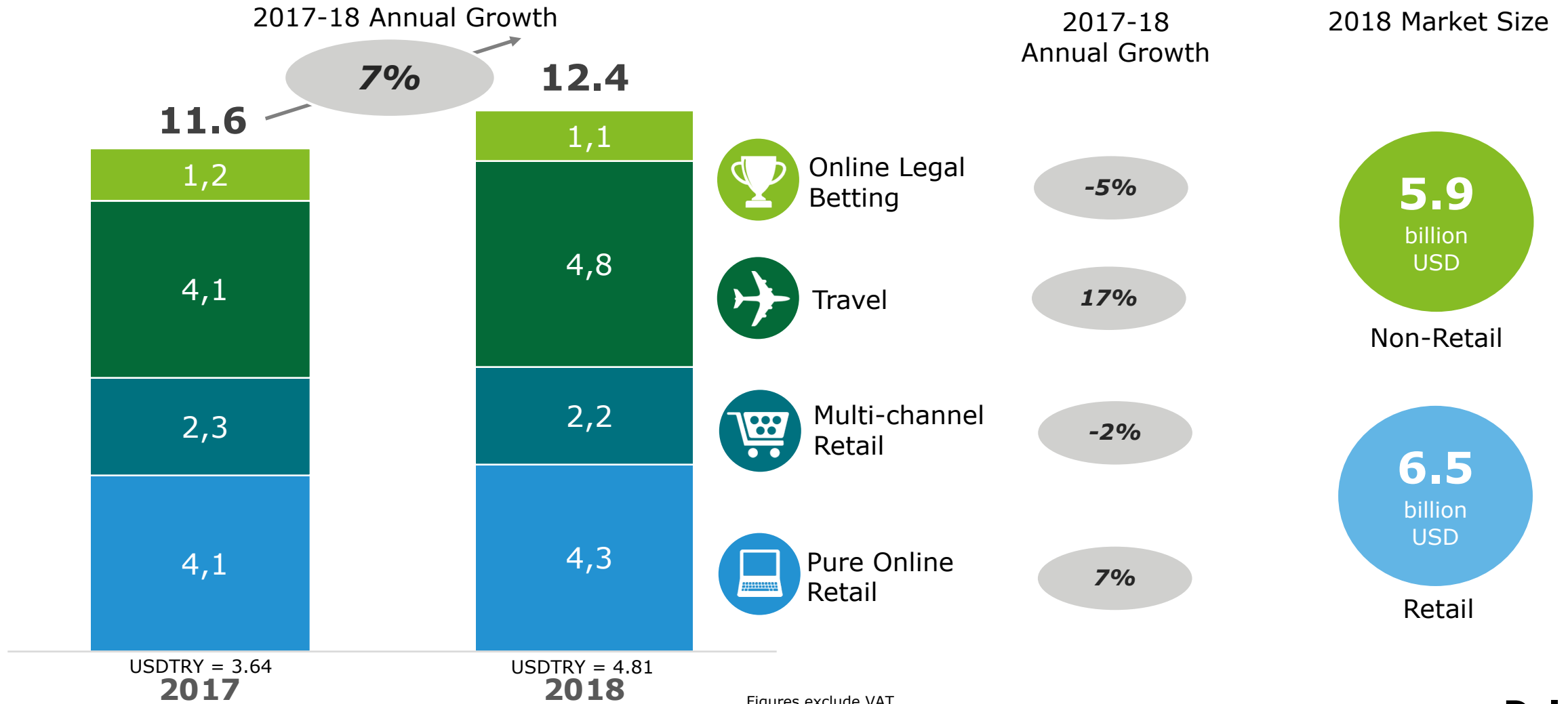
E-Commerce market size in Turkey (billion TRY)



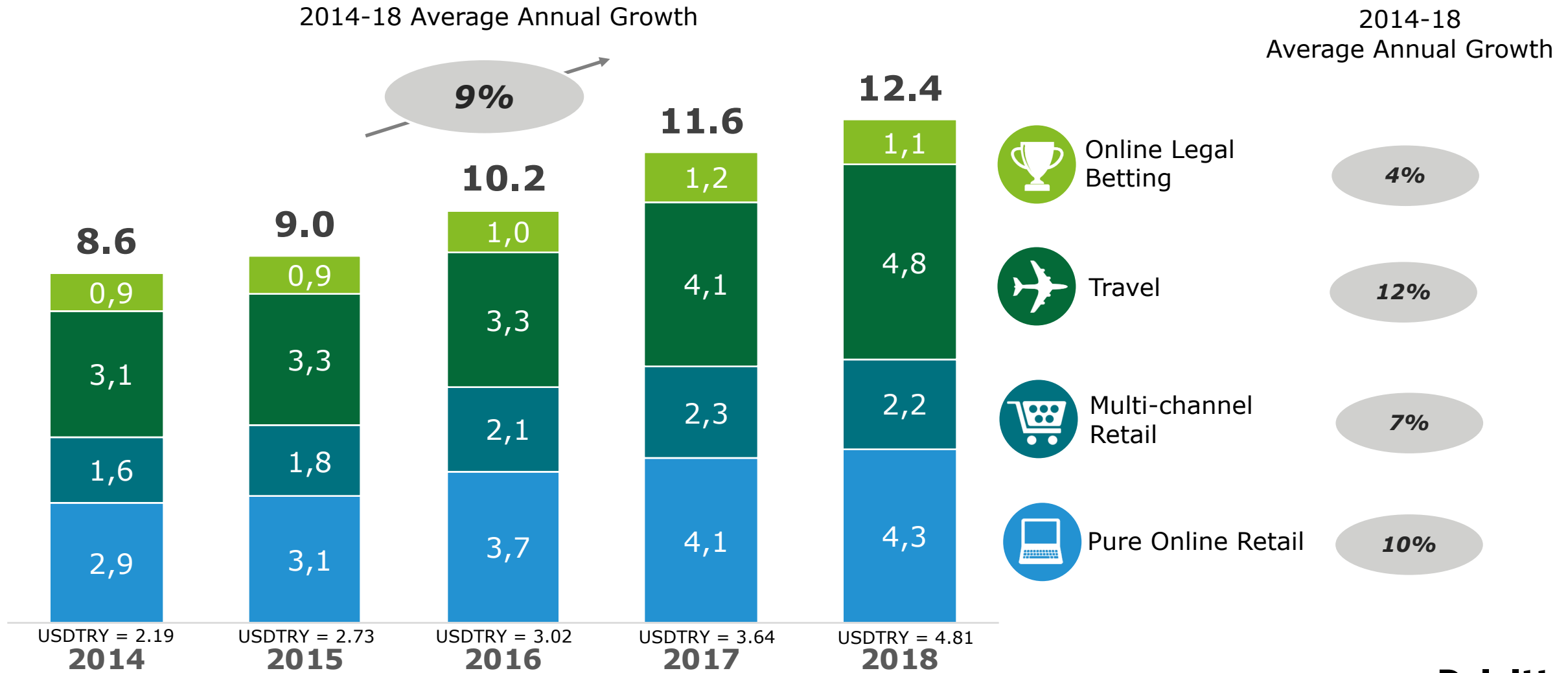
E-Commerce market size in Turkey (billion TRY)



E-Commerce market size in Turkey (billion USD)

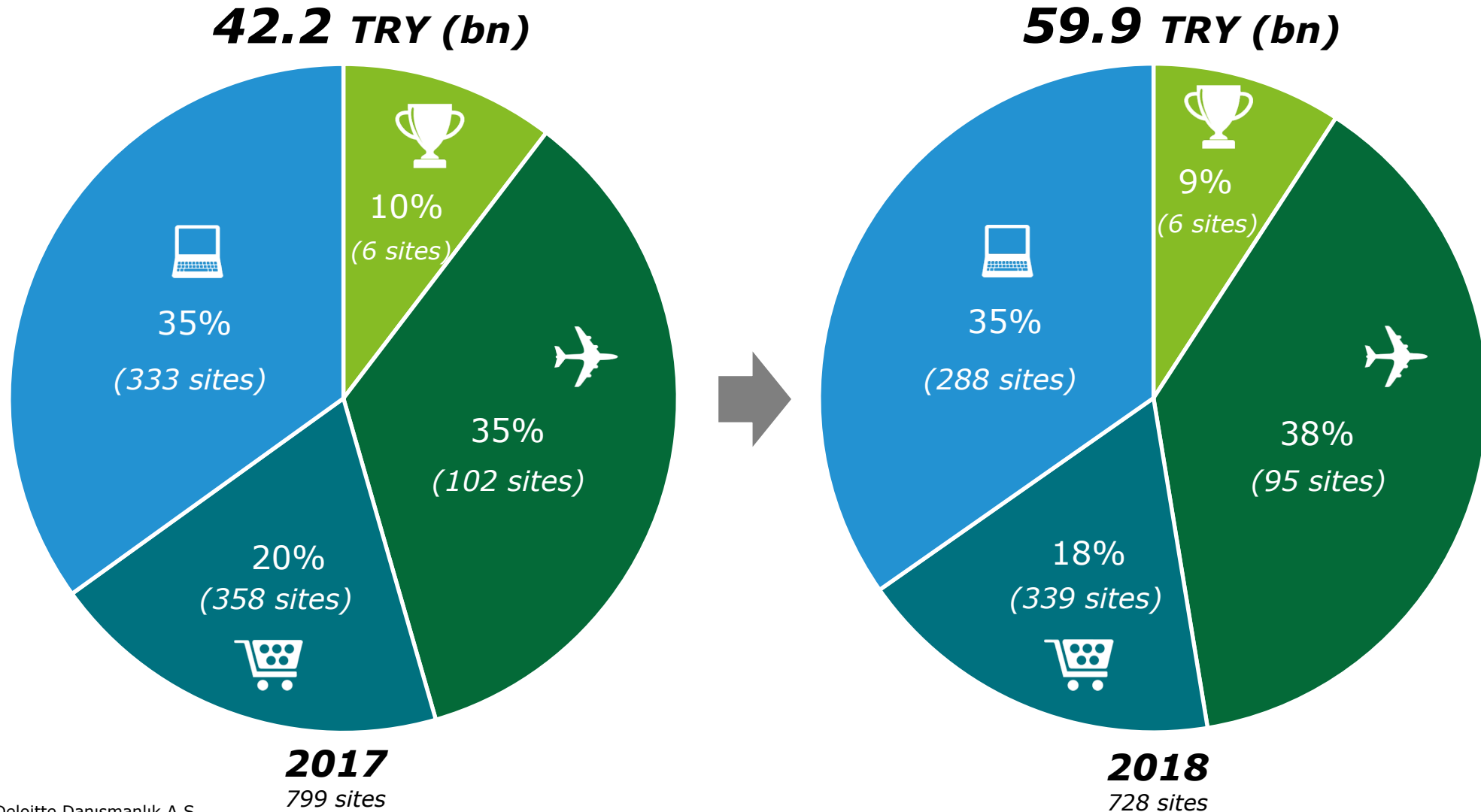


E-Commerce market size in Turkey (billion USD)



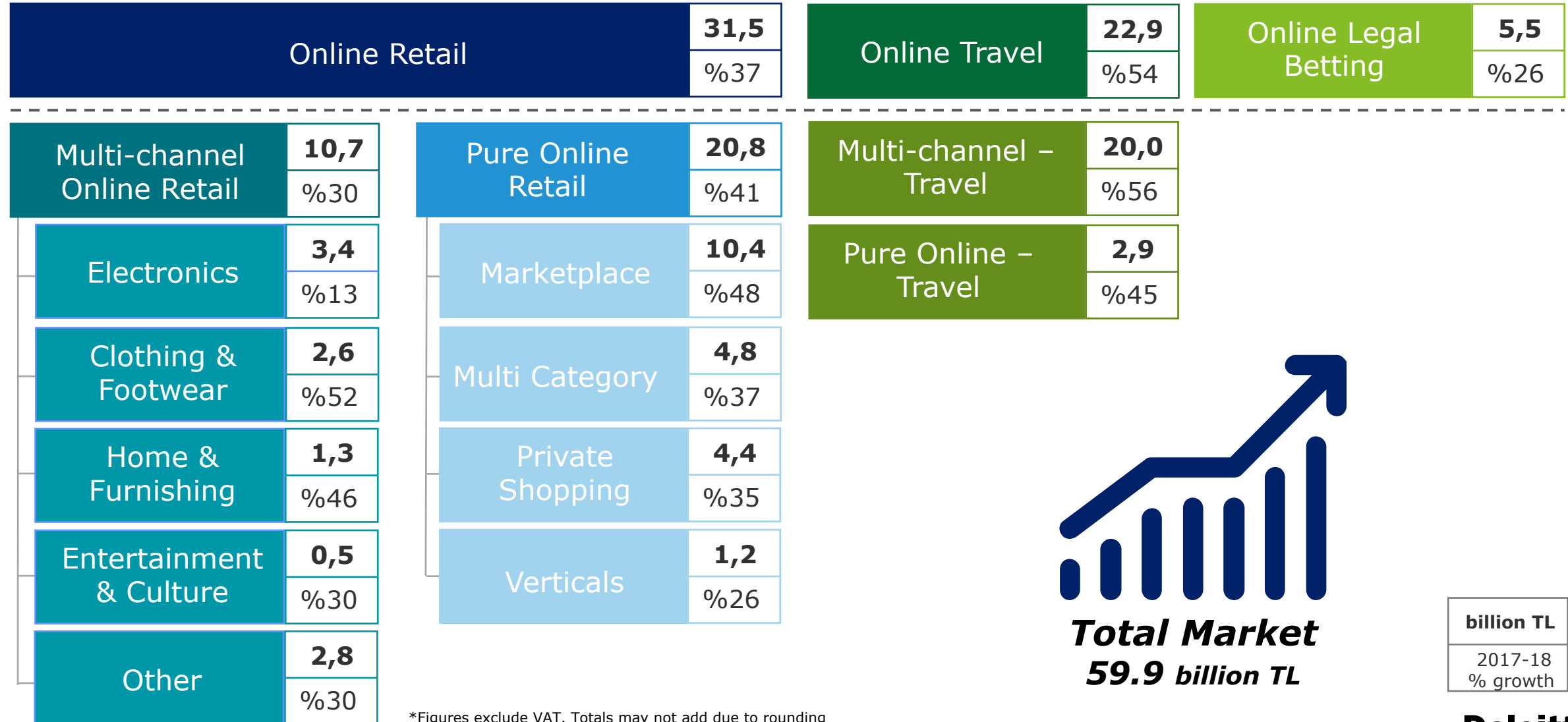
E-Commerce market size in Turkey

Category mix and number of sites



E-Commerce market size in Turkey by category

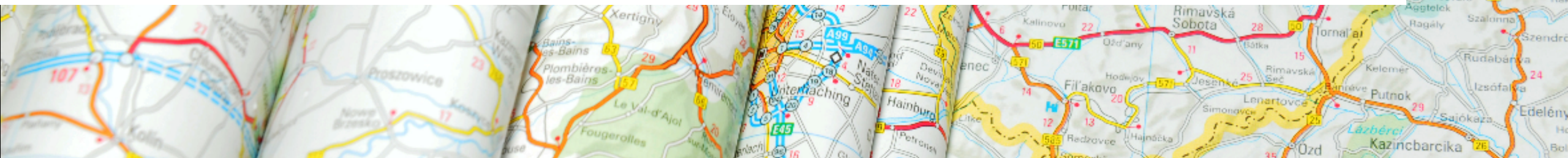
billion TRY



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



Global comparisons



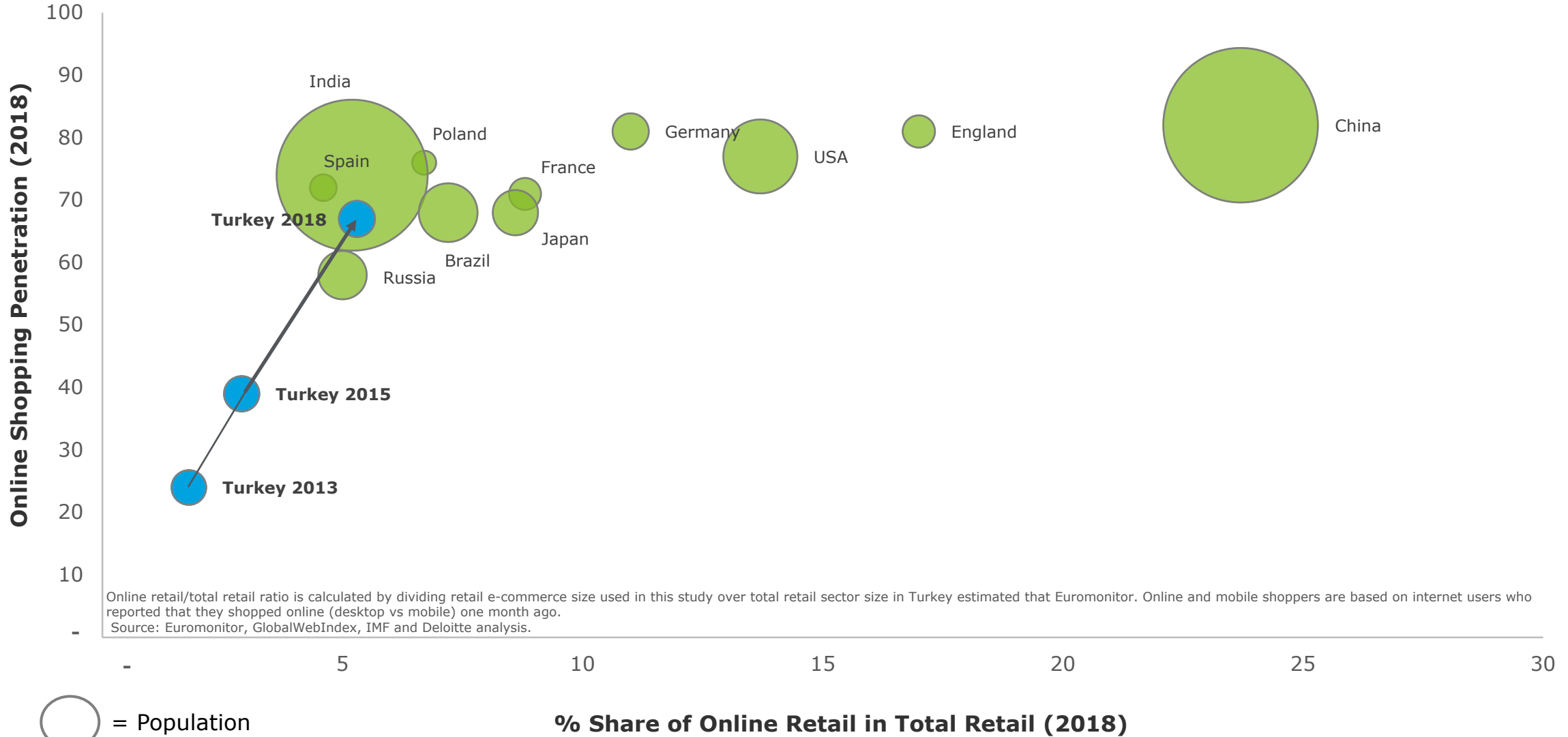
Global comparisons (2018)

| 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 |
| USA | 13.7 | 33.4 | 136.6 | 77 | 44 | 62.6 | 328.1 |
| Germany | 11.0 | 40.7 | 81.0 | 81 | 29 | 52.5 | 82.7 |
| France | 8.8 | 42.9 | 85.5 | 71 | 26 | 45.7 | 65.0 |
| 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 |
| Average 11.1%* | | | | | | | |
| China | 23.7 | 31.8 | 98.1 | 82 | 74 | 18.1 | 1,396.9 |
| Poland | 6.7 | 18.4 | 102.6 | 76 | 36 | 31.9 | 37.9 |
| India | 5.2 | 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 |
| Average 5.9%** | | | | | | | |
| 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)

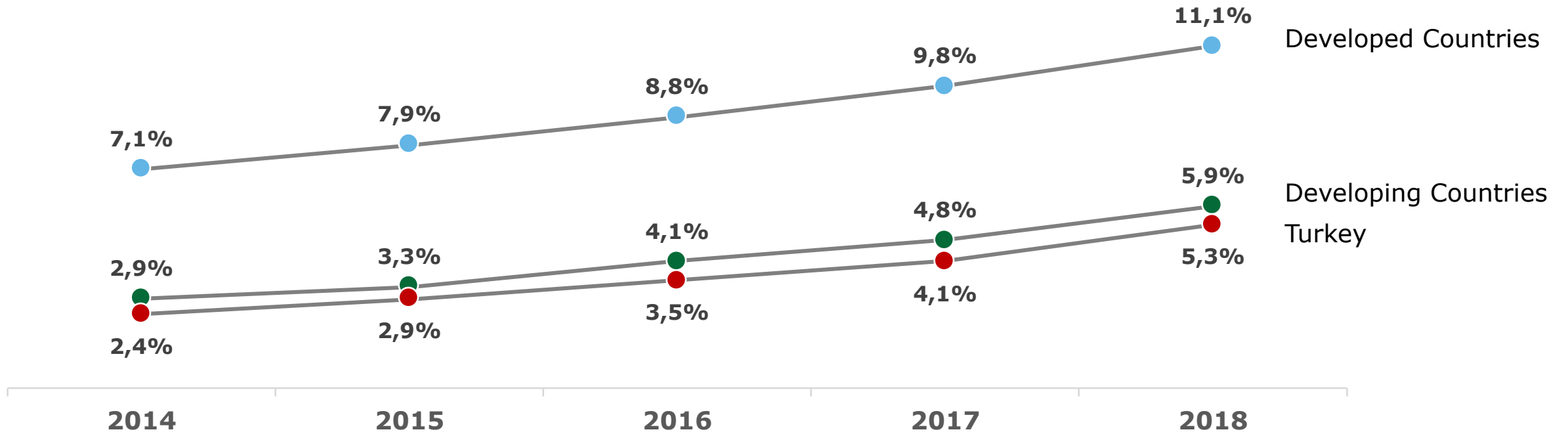


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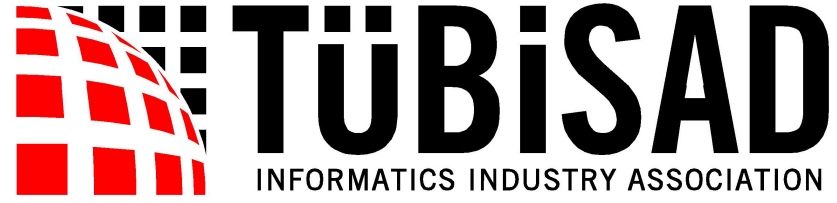
○ = Population

Global comparisons (2014-2018)

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



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Deloitte.



Thank You

We would like to thank
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valuable contributions.