

Global B2C E-commerce Report 2015

Facts, Figures, Infographics & Trends of 2014 and the 2015 Forecasts
of the Global B2C E-commerce Market of Goods and Services



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Global B2C E-commerce Report 2015

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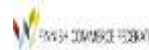
Czech Republic



Denmark



Finland



Finland



France



Germany



Greece



Hungary



Ireland



Italy



Netherlands



Norway



Poland



Portugal



Spain



Switzerland



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Global B2C E-commerce Reports 2015

Preface

Online retail has been booming over the last few years. At \$1.9 trillion, global B2C e-commerce sales of goods and services nearly doubled in 2014 in comparison with 2011. In addition, the share of e-commerce in the Gross Domestic Product increased from 1.48% to 2.63% over the same period, showing that the role of e-commerce is growing exponentially within the global economy. And all signs indicate that this growth will continue over the next few years.

As national borders continue to fade through the Internet, cross-border e-commerce is becoming more and more important. It forms an interesting method for companies to increase their business volume, as they are able to attract customers from other countries. Still, companies that want to sell goods and/or services in other countries than their own are often faced with several challenges and burdens. For instance, each country has its own tax, legal and customs regulations in place, complicating cross-border trading.

The Ecommerce Foundation strives to assist companies that have the ambition to sell goods and/or services cross-border in overcoming these challenges. It does so by providing them with the necessary information through reports, benchmarks, studies and publications that cannot be realized on a national or individual basis.

The Ecommerce Foundation's B2C E-commerce Reports are an excellent example of this as they offer readers detailed, accurate and relevant information about e-commerce and other economic subjects in countries from all over the world. Their content includes figures that are based on the Global Online Measurement Standard for B2C E-Commerce (GOMSEC), interviews with e-commerce experts and clear tables and infographics.

This Global B2C E-commerce Report provides an in-depth look at global B2C e-commerce, as well as a summary of the most important e-commerce markets in the world. More detailed information on these markets can be found in the European and global regional reports, which will be published in the fall of 2015.

Naturally, we could not have realized these reports without the help of others. Therefore we want to use this opportunity to express our gratitude to GlobalCollect|Ingenico, who has enabled us to make our reports widely available, and to GfK for their close cooperation and involvement.

If you would like to receive additional information, purchase reports or become involved with the Ecommerce Foundation, please contact us through our website www.ecommercefoundation.org or send us an email at info@ecommercefoundation.org.

Jorij Abraham



Director Ecommerce Foundation



Richard van Welie



Chief Editor Ecommerce Foundation



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The Ecommerce Foundation is a non-profit organization founded by Ecommerce Europe. It conducts research and studies in the field of e-commerce and provides for benchmarking and reports on e-commerce facts and figures. It also serves as Ecommerce Europe's research institute. In this role, the Ecommerce Foundation was commissioned by Ecommerce Europe to develop the European B2C E-commerce Report and more than forty national e-commerce reports.

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Ecommerce Europe is the association representing 25,000+ companies selling goods and/or services online to consumers in Europe. Founded by leading national e-commerce associations, Ecommerce Europe is the voice of the e-commerce sector in Europe. Its mission is to stimulate cross-border e-commerce through lobbying for better or desired policy, by offering a European platform bringing the European e-commerce sector and other stakeholders together, and by providing in-depth research data about European markets.

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“Convenience decisive for change and success”

E-commerce beyond pure growth

E-commerce has continued to grow across countries and sectors. While in some market segments the growth in online sales has tended to slow down, the importance of touchpoints across diverse channels during the purchase journey has reached an extremely high level (depending on the category more than 60% of shoppers enjoy multichannel purchasing activities). Retail formats that deliver on this complexity will therefore be more successful in the future.

Globally, online markets for Technical Consumer Goods are very different in terms of maturity. There are countries with very dynamic development, coming from a modest level, like Portugal and Spain (current online share close to 10% and growth about + 30%). On the other hand, there are countries with high growth, where Internet sales are already very well established, like China, Russia and Brazil. More mature markets with a high online share and more modest growth below 15% include Great Britain, France and Germany.

Retail trends

The retail industry is in constant change. According to a recent expert study by GfK, the driver that is currently most influential and is having most impact on the retail scene is **shoppers' convenience expectation**: a very demanding issue in an increasingly complex retail and shopping environment. One of the keys to achieving a **seamless cross-channel experience** (third-most important driver in the future) is **mobile Internet and communication** (most important future driver).

Retail formats of the future

Marketplaces are in good shape. They seem to meet shoppers' expectations in terms of convenience and offer. The future of those that provide a variety of

hybrid shopping formats, particularly if they are delivering on a mobile shopping experience, looks promising. Those that focus on only one channel are, however, expected to be less successful.

Shoppers

Shoppers are certainly changing, but some aspects of shopping remain the same. People enjoy it as a social activity and this is particularly true for the younger age group. Still, the social nature of shopping has changed and this must be understood. To an increasing extent it has to do with online socializing.

When identifying a highly attractive future shopper segment – we call them Leading Edge Consumers – the importance of really understanding their needs becomes evident. They expect an even higher level of security for their personal data, but at the same time want websites to track their online behavior and provide individualized offers. This is a challenge for all retailers.

Outlook

The regions of the world are changing at different speeds. Former developing regions have become leaders in some respects – for example, in mobile shopping and payment where Europe is way behind. Retailers need to understand the success factors and the changing needs of individual shopper segments in order to succeed.



Markus Tuschl
Global Director Digital Retail at GfK

“The European Market Changes Constantly”

Key Trends and Best Practices for Cross-border E-commerce in Europe

Europe is mostly a mature e-commerce market, but it changes and evolves constantly. For merchants, there is still plenty of opportunity for growth by expanding into new European markets. Especially the Southern and Eastern European regions include several emerging countries. However, the unique dynamics of the European marketplace do require careful consideration and planning.

While selecting the right payment mix per country is part of the necessary basis for cross-border expansion, merchants should also anticipate and act on macro-trends, such as changes in the regulatory environment, in consumer behavior and in expectations, in order to be successful. In addition, they should actively analyze and optimize their businesses through aggressive fraud management and the application of big data analytics.

Mobile first strategy

In 2014, mobile commerce well and truly arrived in Europe. The use of mobile devices for online shopping and payments is accelerating. In addition, merchants that have adopted the mobile first strategy in both check out and payment pages are seeing considerably higher success rates.

Big data to monitor risks and identify opportunities

Another major trend that further matured in 2014 is the application of big data analytics and visualization in the domain of online payments. E-commerce leaders such as Amazon have been applying big data for years now with the objective of building sophisticated profiles of their consumers for Conversion Rate Optimization (CRO).

Cross-border payments can quickly become very complex and hard to manage. Huge volumes of data need to be analyzed in order to identify issues and opportunities. By applying analytics and visualization to payments data, merchants can track and compare performance per country, per payment method or per time period, and take appropriate steps to optimize processes.

Combating sophisticated fraud

Fraud is a fact of life for merchants. This is particularly true for international merchants, because cross-border payments have significantly higher fraud rates than domestic payments. Increasingly, sophisticated fraudsters also take advantage of the shift to mobile payments, where fraud losses are relatively higher.

However, rather than accepting fraud as a cost of doing cross-border business, merchants should take action to minimize its impact. In addition to improving the bottom line, this also limits the risk of the kind of reputation damages that go hand-in-hand with online fraud.



David Shell
Vice President, Global Marketing and Communications
at GlobalCollect | Ingenico

Global B2C E-commerce

Detailed overview of the Global E-commerce Market



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Asia-Pacific	\$ 770 bn	+44%
Europe	\$ 565 bn	+15%
North America	\$ 523 bn	+12%
Latin America	\$ 37 bn	+18%
MENA	\$ 21 bn	+22%
Others	\$ 25 bn	+24%

Global
\$1,942 bn +25%
Total B2C E-sales of Goods and Services 2014



Cross-border B2C E-commerce

Most popular countries:

	USA	47%
	UK	38%
	China / HK	31%
	Canada	17%
	Australia	16%
	Germany	13%



"309 million consumers bought cross-border last year and this number is expected to grow in 2015"

Top 10 e-commerce countries in turnover (EUR billion)

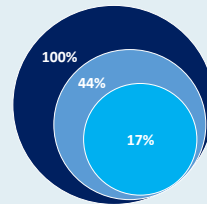
	China	\$ 538 *
	USA	\$ 483
	UK	\$ 169
	Japan	\$ 136
	Germany	\$ 95
	France	\$ 75
	Canada	\$ 28
	Russia	\$ 25
	Spain	\$ 22
	Australia	\$ 21

* B2C & C2C goods & services, excluding insurances

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Global
Online
Measurement
Standard B2C
E-Commerce

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7,223 million
people live in the world
3,180 million
people use the Internet
1,228 million
people are e-shoppers

Forecast 2015
\$ 2,249 bn
Turnover E-commerce
Goods & Services

USA, China and
UK account
for 61% of total
B2C e-commerce
sales in the
world

Estimated share
of online goods
in total retail of goods

5.9%



72%

Share of Internet users
accessing the web
through a mobile
device worldwide



"2.1 billion active social media accounts worldwide"

Average spending
per e-shopper



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Overview of the Covered Countries

Global B2C E-commerce

Covered countries

This table provides you with some relevant information regarding the countries that are covered in this report.

The countries mentioned in the table are selected for this Global B2C E-commerce Report because they are influential in their regions and are all discussed in brief in this report. For more detailed information about these and other countries, we refer you to our regional reports.



Country	Capital	VAT	Currency	Population
Argentina	Buenos Aires	21.0%	Peso (ARS)	41.8mn
Australia	Sydney	10.0%	Dollar (AUD)	23.5mn
Brazil	Rio de Janeiro	17.0%	Real (BRL)	202.0mn
Canada	Ottawa	5.0%	Dollar (CAD)	35.5mn
Chile	Santiago	19.0%	Peso (CLP)	17.8mn
China	Beijing	17.0%	Yuan (CNY)	1,364.3mn
France	Paris	20.0%	Euro (EUR)	65.8mn
Germany	Berlin	19.0%	Euro (EUR)	80.8mn
India	New Delhi	12.5%	Rupee (INR)	1,267.4mn
Italy	Rome	22.0%	Euro (EUR)	60.8mn
Japan	Tokyo	8.0%	Yen (JPY)	127.1mn
Mexico	Mexico City	16.0%	Peso (MXN)	123.8mn
Russia	Moscow	18.0%	Ruble (RUB)	143.7mn
South Korea	Seoul	10.0%	Won (KRW)	50.4mn
Spain	Madrid	21.0%	Euro (EUR)	46.5mn
United Kingdom	London	20.0%	Pound (GBP)	64.4mn
United States	Washington D.C.	5.0%	Dollar (USD)	318.9mn

Global B2C E-commerce in Brief

Global B2C E-commerce

In 2014, the **global population** amounted to around **7.2 billion people**, of which **1.2 billion** people purchased goods and/or services online at least once. In total, they spent **\$1,941.6bn**, which results in an average spending per e-shopper of **\$1,581**.

Asia-Pacific strongest B2C e-commerce region in the world

Just like in 2013, **Asia-Pacific** was the strongest B2C e-commerce region in the world last year. With a B2C e-commerce turnover of **\$770.0bn**, it ranked ahead of **Europe** (**\$565.4bn**) and **North America** (**\$522.9bn**).

Latin America and **Middle East and North Africa (MENA)** were the smallest B2C e-commerce markets in 2014. They achieved B2C e-commerce sales of **\$37.4bn** and **\$21.0bn**, respectively.

Top countries

China surpassed the **United States of America** as the strongest country in terms of B2C e-commerce turnover last year. With **\$538.1bn**, it was above the **US** (**\$482.7bn**) and the **UK** (**\$169.0bn**). Together, these three countries account for **53%** of the total global B2C e-commerce turnover.

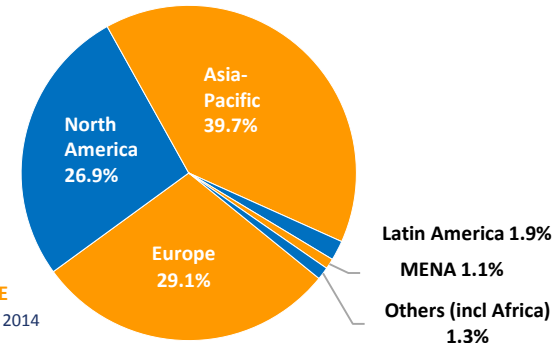
Still, it should be noted that China's figure include **C2C** sales; part of it is turnover of rural SMEs, which are registered as C2C through "consumer accounts" at popular market places.

E-commerce turnover per region

E-commerce turnover of the global regions, 2013-2014

Region	2013	2014	Growth*
World	\$1,563.8bn	\$1,941.6bn	24.5%
Asia-Pacific	\$533.8bn	\$770.0bn	44.3%
Europe	\$494.9bn	\$565.4bn	15.3%
North America	\$466.0bn	\$522.9bn	12.2%
Latin America	\$31.6bn	\$37.4bn	18.2%
MENA	\$17.3bn	\$21.0bn	21.5%

* Growth rate based upon national currencies



OVERVIEW GLOBAL B2C E-COMMERCE

Share of regions in global B2C e-commerce, 2014

Source: Ecommerce Foundation, 2015

Economic Indicators per Region

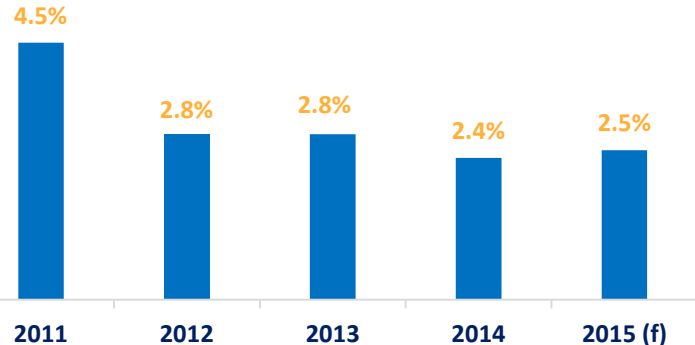
Global B2C E-commerce

GDP real growth rate

The real growth rate of the **Global Gross Domestic Product (GDP)** was **2.4%** in 2014. This was slightly lower than in the preceding year (**2.8%**). For 2015, the world economy is expected to recover a little, which is reflected in the forecast growth rate of **2.5%**.

GROWTH RATE OF THE GLOBAL GDP

Percentage change, 2011 - 2015



Sources: Ecommerce Foundation, Statista 2015 (1)

eGDP

In terms of the **share of e-commerce in GDP**, Asia-Pacific is the clear frontrunner. Its eGDP rates of **3.3%** is significantly above the global average of **2.6%**.

With an eGDP of **0.8%**, the **Middle East and Northern Africa** and **Latin American** are at the bottom of the list, which indicates that there is a lot to be gained in terms of e-commerce in these regions.

2.4%
growth of
global GDP
in 2014

REGIONS IN TERMS OF SHARE eGDP

GDP at market prices and share of e-commerce in GDP of covered countries in report, 2014

Region	GDP at market prices	Share of e-commerce in GDP
Global	\$73,479bn	2.6%
Asia-Pacific*	\$23,215bn	3.3%
North America	\$20,488bn	2.6%
Europe	\$22,663bn	2.5%
Latin America	\$4,494bn	0.8%
Mena	\$2,619bn	0.8%

Sources: Worldbank, Tradingeconomics, Statista, 2015

*The GDP for the major Asian-Pacific economies are actual. The other countries (including Taiwan, Philippines and Thailand) are based upon a educated guess from the 2012 figures from the Worldbank.

Economic Indicators per Country

Global B2C E-commerce

eGDP real growth

The **share of e-commerce** in the global GDP continued to increase last year. After reaching **2.0%** in 2011, the **eGDP** grew steadily over the last few years, to **2.6%** in 2014. The **importance of e-commerce** is expected to continue to gradually increase.



Sources: Index Mundi, Ecommerce Foundation, 2015

eGDP

In terms of the **share of e-commerce in GDP per country**, the **UK** and **China** are clearly above the rest, with a share of **5.7%** and **5.2%**, respectively. With this, their eGDP is about twice as high as that of the United States (**2.8%**).

It is interesting to note that the eGDP rates of the so-called **BRICS countries** in this list, except for China, are **relatively low**. Still, these countries are becoming **increasingly important e-commerce markets** and it is expected that their rates will increase significantly in the near future.

TOP 12 COUNTRIES IN TERMS OF eGDP

GDP at market prices, GDP per capita at market prices and share of e-commerce in GDP, 2014

	GDP at market prices	GDP per capita at market prices	Share of e-commerce in GDP
Global	\$73,479bn	\$28,144	2.6%
United Kingdom	\$2,942bn	\$45,700	5.7%
China	\$10,360bn	\$7,594	5.2%
Japan	\$4,601bn	\$36,194	2.9%
USA	\$17,419bn	\$54,629	2.8%
France	\$2,829bn	\$43,043	2.7%
Germany	\$3,853bn	\$46,763	2.5%
Spain	\$1,404bn	\$30,290	1.6%
Canada	\$1,787bn	\$50,271	1.6%
Australia	\$1,454bn	\$61,887	1.4%
South Korea	\$1,410bn	\$27,970	1.4%
Russia	\$2,057bn	\$15,411	1.2%
Mexico	\$1,283bn	\$10,361	1.0%

Sources: Worldbank, Trading economics, Statista, 2015

Internet Penetration

Global B2C E-commerce

Internet penetration per region

The average **Internet penetration** in the five global regions slightly increased to **44%** in 2014. This resulted in **3.2 billion people** being connected to the Internet.

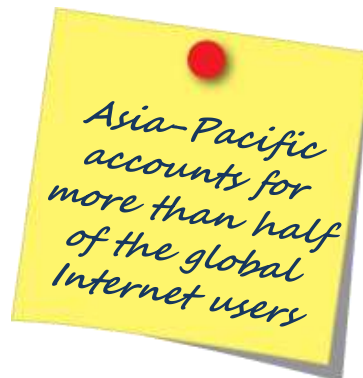
At **76%**, **North America** had the highest rate of people with Internet access, followed by **Europe** with **72%**. It is interesting to see that even though **Asia-Pacific** achieved the highest B2C e-commerce sales last year, it also had the lowest Internet penetration. When this rate increases, its e-commerce turnover will grow even more.

INTERNET ACCESS PER REGION

Internet access covered countries and online population, 2014

Regions	Internet access*	Online Population
Regions Total (excl. BRICS)	44%	3,180.1mn
North America	76%	364.6mn
Europa	72%	587.2mn
Latin America	56%	221.0mn
MENA	42%	182.3mn
BRICS	38%	1,144.9mn
Asia-Pacific	36%	1,825.0mn

Sources: Worldbank, 2015



Internet penetration per country

With regard to the countries covered in this report, the **UK** had the highest Internet penetration; **92%** of its population had access to the Internet in 2014. It was followed by **Japan** (**91%**) and the **US** (**87%**).

Even though **Asia-Pacific** was the region with the lowest Internet penetration, there were three Asian-Pacific countries in the top 10. However, with only **18%** of its **1.3 billion inhabitants** being connected to the web, **India** significantly lowered the region's average. In addition, at **49%**, **China's** Internet penetration was also quite low.

TOP 10 COVERED COUNTRIES ON BASIS OF INTERNET PENETRATION

Internet access and online population, 2014

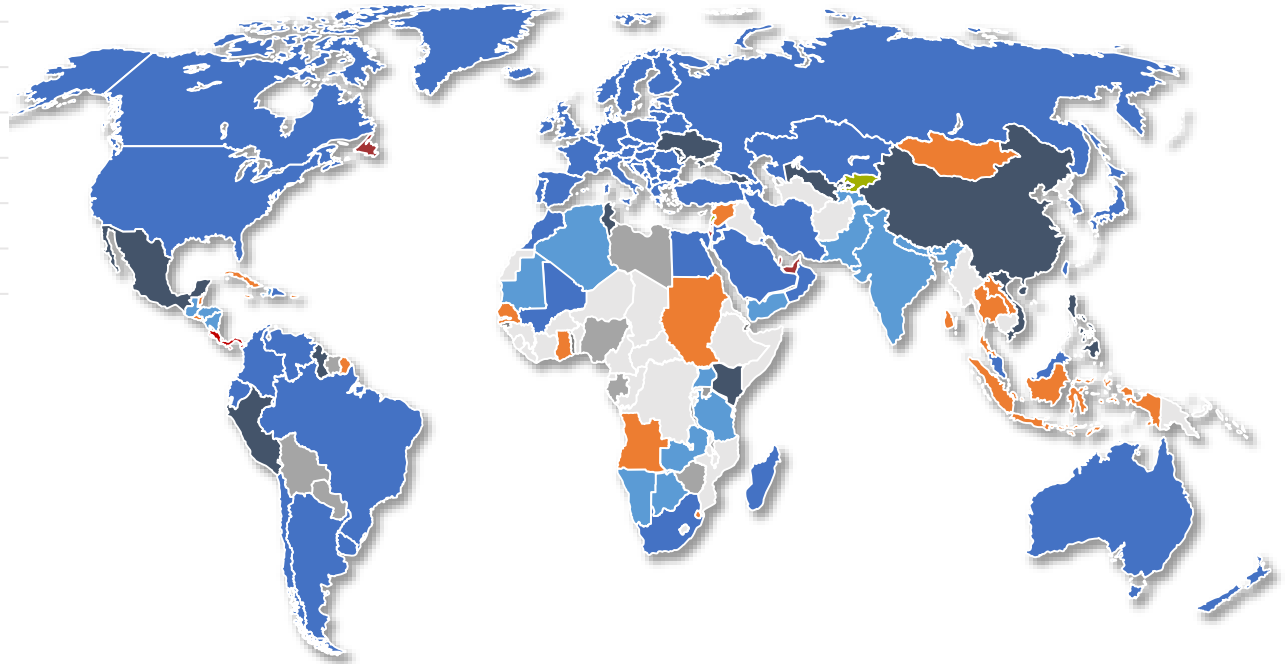
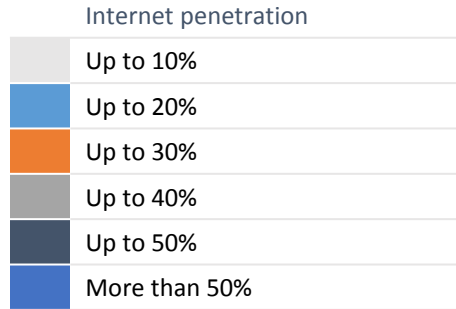
Countries	Internet access*	Online Population
Top 10 countries	84%	719.8mn
United Kingdom	92%	59.0mn
Japan	91%	115.2mn
USA	87%	278.7mn
Canada	87%	31.0mn
Germany	86%	69.6mn
Australia	85%	19.9mn
South Korea	84%	42.5mn
France	84%	55.1mn
Spain	76%	35.4mn
Chile	72%	12.9mn

Sources: Worldbank, Internetlivestats, Eurostat, Ecommerce Foundation, 2015

*share of total population

Global Overview Internet Penetration

Global B2C E-commerce



Source: Internetworldstats, 2014

Population and E-households

Global B2C E-commerce

Population per region

The table below provides an overview of the **global regions** in terms of **population**. **Asia-Pacific** is clearly in the lead in this regard, with a total population of **5.1 billion people**. This is mainly due to the presence of China and India, which together account for more than one third of the world's population. When we look at the other continents, **Europe** ranked second with **817.5 million** inhabitants, followed by **North America** (**478.2 million**).

REGIONS IN TERMS OF TOTAL POPULATION

Total population, number of households and e-households, 2014

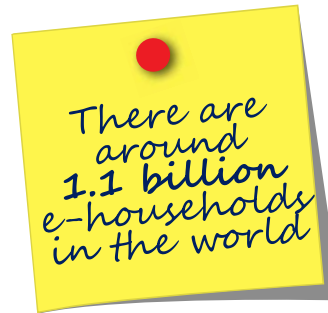
Regions	Total population	Number of Households	Number of e-Households
Regions total (excl. BRICS)	7,222.6mn	2,210.8mn	1,050.5mn
Asia-Pacific	5,095.5mn	1,512.1mn	574.2mn
BRICS	3,031.5mn	897.0mn	361.3mn
Europe	817.5mn	331.7mn	243.7mn
N. America	478.2mn	167.6mn	132.5mn
MENA	437.8mn	82.5mn	34.2mn
L. America	393.6mn	116.8mn	65.9mn

Sources: Worldbank, Ecommerce Foundation, 2015

Population per country

With **1.4 billion** inhabitants, **China** was the leader with regard to population in 2014. It was closely followed by **India**, which had a total of **1.3 billion** inhabitants. It is expected that India will surpass China around 2025.

The gap between these two nations and the other countries is considerable. The **United States** ranked third with **318.9 million** inhabitants, while **Indonesia** (**252.8 million**) and **Brazil** (**202.0 million**) completed the top 5.



TOP 10 COUNTRIES IN TERMS OF TOTAL POPULATION

Total population, number of households and e-households, 2014

Countries	Total population	Number of Households	Number of e-Households
Top 10	3,946.6mn	1232.1mn	597.8mn
China	1,364.3mn	454.8mn	224.2mn
India	1,267.4mn	311.4mn	56.1mn
USA	318.9mn	121.2mn	106.0mn
Indonesia	252.8mn	67.2mn	11.5mn
Brazil	202.0mn	64.1mn	37.0mn
Russia	143.7mn	56.4mn	39.7mn
Japan	127.1mn	54.3mn	49.2mn
Mexico	123.8mn	32.3mn	14.4mn
Germany	80.8mn	40.4mn	34.8mn
France	65.8mn	29.9mn	25.1mn

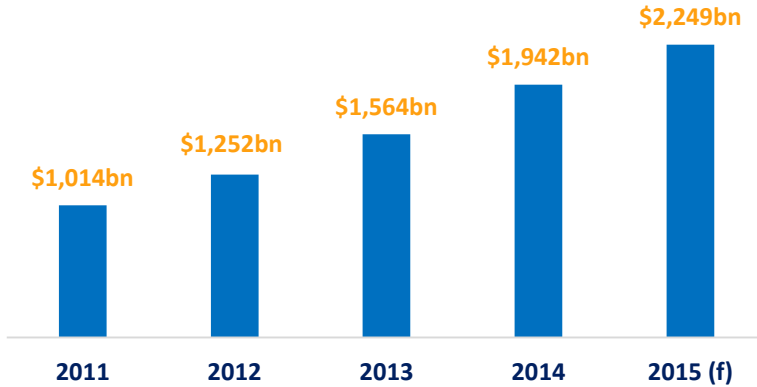
Sources: Worldbank, Internetlivestats.com, Eurostat, Generator Research, Ecommerce Foundation, 2015

Growth in Global B2C E-commerce Sales

Global B2C E-commerce

GLOBAL B2C E-COMMERCE SALES

Total online sales of goods and services of countries covered, 2011 - 2015



Source: Emarketer, Ecommerce Foundation, 2015

E-commerce turnover
is expected to grow
to
\$2,249bn
in 2015

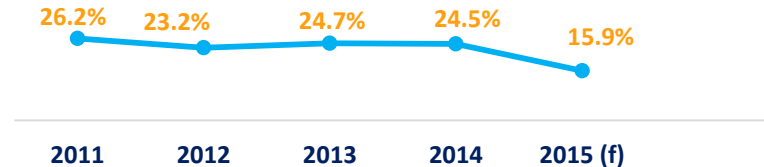
Growth

Global B2C e-commerce sales have been increasing steadily since 2010. In addition, the growth rate has been quite consistent over the last few years, as shown in the graph below.

However, this trend is not expected to continue in 2015, as a growth rate of **15.9%** is forecast, resulting in a global B2C e-commerce turnover of **\$2,249bn**. Even though this growth rate is still significant, its decrease can be seen as a first sign of the global B2C e-commerce market becoming more and more mature.

GLOBAL B2C E-COMMERCE GROWTH RATE

Percentage change in B2C e-commerce turnover of countries covered, 2011 - 2015



Source: Ecommerce Foundation, 2015

Top 12 Countries B2C E-commerce Sales

Global B2C E-commerce

B2C e-commerce turnover

In the category of **B2C e-commerce sales**, **China** and the **United States** are at the top. In 2014, the Chinese in total spent **\$538.1bn** online, while the American B2C e-commerce turnover amounted to **\$482.7bn**. The **UK (\$169.0bn)**, **Japan (\$135.5bn)** and **Germany (\$94.6bn)** completed the top 5.

In comparison with last year, China grew significantly faster than the US. As. In comparison with 2013, Chinese B2C e-commerce sales grew by almost **64%**, while in the USA it grew by **nearly 12%**. As a result, China surpassed the US as the largest B2C e-commerce market.

For 2015 as well, the Chinese e-commerce market is expected to **increase much faster** than the American one (**22% vs. 12%**). As a result, it will continue to increase its lead.

In the chapter of **Trends and Overviews**, **complete overviews** with regard to **B2C e-commerce sales and growth rates** of all countries covered in this report are included.

TOP 12 COUNTRIES IN TERMS OF B2C E-COMMERCE SALES

Online sales of goods and services, 2011 - 2015

Countries	2011	2012	2013	2014	2015 (f)
China	\$95.0bn	\$184.0bn	\$328.5bn	\$538.1bn	\$654.4bn
USA	\$347.1bn	\$382.1bn	\$432.3bn	\$482.7bn	\$540.7bn
UK	\$111.7bn	\$127.8bn	\$142.4bn	\$169.0bn	\$191.2bn
Japan	\$98.5bn	\$110.3bn	\$118.6bn	\$135.5bn	\$156.8bn
Germany	\$54.6bn	\$66.4bn	\$84.2bn	\$94.6bn	\$106.3bn
France	\$50.1bn	\$59.8bn	\$67.9bn	\$75.5bn	\$82.9bn
Canada	\$18.3bn	\$21.0bn	\$24.2bn	\$27.8bn	\$31.3bn
Russia	\$10.3bn	\$13.7bn	\$20.6bn	\$25.0bn	\$30.6bn
Spain	\$14.5bn	\$17.2bn	\$19.1bn	\$22.5bn	\$25.2bn
Australia	\$13.9bn	\$16.0bn	\$18.4bn	\$21.0bn	\$23.8bn
Brazil	\$9.1bn	\$15.8bn	\$18.6bn	\$21.0bn	\$23.5bn
South Korea	\$16.3bn	\$17.3bn	\$18.5bn	\$20.2bn	\$21.9bn

Source: National associations, Ecommerce Foundation 2015

“Total online sales in the top 12 countries are projected to reach \$1,889bn in 2015”

Share of Top 12 Countries in B2C E-commerce Sales

Global B2C E-commerce

E-commerce powers

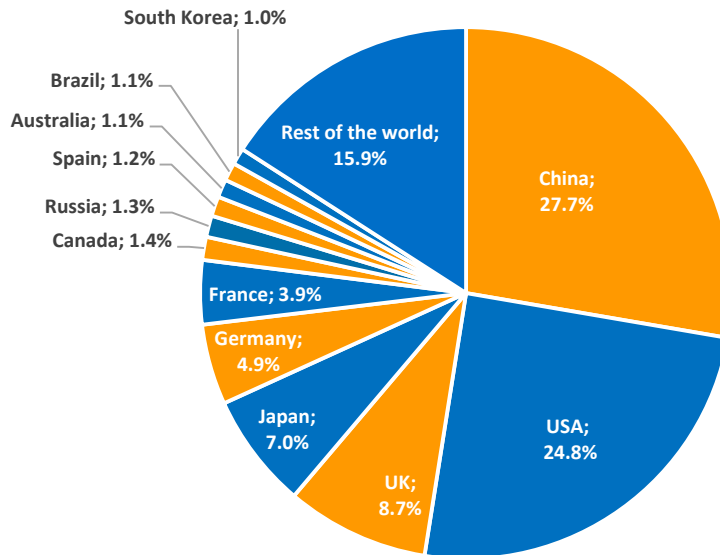
This graph shows the share of each top 12 country in the global B2C e-commerce market of 2014. China was the largest e-commerce market, with a share of 27.7%. The USA ranked second with 24.8%, followed by the UK (8.7%) and Japan (7.0%).

It is interesting to see that compared to 2013, China increased its market share by around 6.5%. It also took some share from the other major countries. The US, for instance, lost more than 2% of its market share.

Within the top 12, the difference between the top 4 and the rest is still quite significant. Together, the USA, China, UK and Japan account for more than 68%, of the global B2C e-commerce market, while the other eight countries combine for nearly 16%.

TOP 12 COUNTRIES SHARE OF GLOBAL B2C E-COMMERCE MARKET

Share of global B2C e-commerce market, 2014



Source: Ecommerce Foundation, 2015



Online Expenditure per E-shopper

Global B2C E-commerce

Online spending per e-shopper

Looking at the **online spending per online shopper** in the countries covered in this report, it is clear in which country people spent the most money online in 2014. In the **UK**, the average e-consumer spent **\$3,204** online on goods and/or services, which is considerably more than in the **USA (\$2,475)**, which ranked second.

TOP 12 COUNTRIES E-SHOPPERS

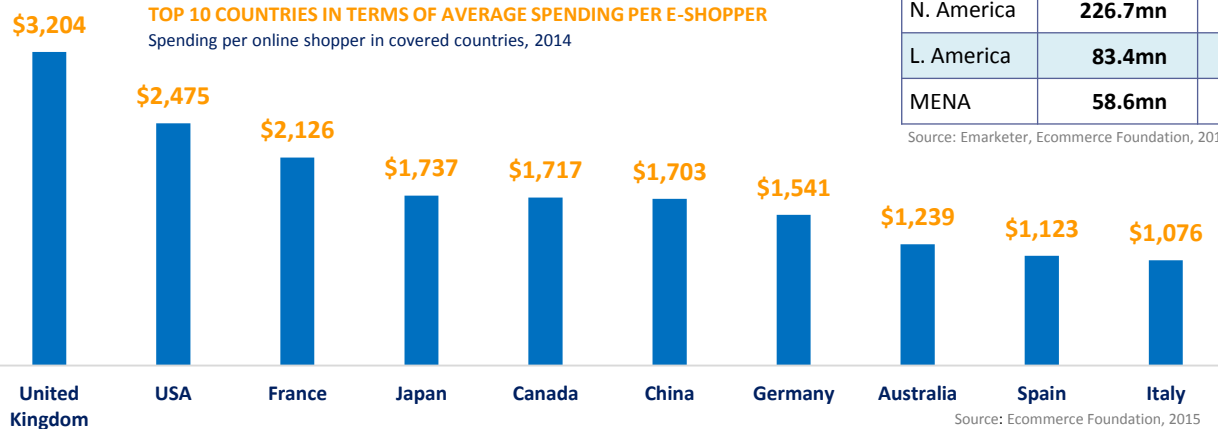
Number of e-shoppers, 2014

Countries	E-shoppers
China	316mn
USA	195mn
Japan	78mn
Germany	61mn
UK	53mn
France	36mn
Brazil	33mn
India	30mn
Russia	28mn
South Korea	27mn
Spain	20mn
Australia	17mn

Source: Eurostat, Ecommerce Foundation, 2015

It is interesting to see that China entered the top 10 of the countries covered with regard to average spending per e-shopper. Whereas **Chinese e-shoppers** only spent **\$1,088** in 2013, this figure significantly increased to **\$1,703**, with which they ranked sixth last year.

With regard to the number of e-shoppers per country, Asia-Pacific is well represented with five countries in the top 12.



AVERAGE SPENDING PER E-SHOPPER PER REGION

Number of e-shoppers of covered countries and spending per online shopper, 2014

Regions	Number of e-shoppers	Average spending per e-shopper
Regions (excl. BRICS)	1,228.1mn	\$1,581
Asia-Pacific	523.1mn	\$1,472
BRICS	409.3mn	\$1,481
Europe	336.3mn	\$1,681
N. America	226.7mn	\$2,306
L. America	83.4mn	\$448
MENA	58.6mn	\$358

Source: Emarketer, Ecommerce Foundation, 2015

Online Expenditure per E-household

Global B2C E-commerce

Online spending per e-household

With regard to the average online spending per e-household, the ranking of the countries covered is quite similar to that of the average spending per e-shopper. The main difference is that South Korea is in the top 10 here, instead of Italy.

TOP 12 COUNTRIES E-HOUSEHOLDS

Number of e-households, 2014

Countries	E-households
China	224.2mn
USA	106.0mn
India	56.1mn
Japan	49.2mn
Russia	39.7mn
Brazil	36.9mn
Germany	34.8mn
UK	25.6mn
France	25.1mn
South Korea	16.7mn
Italy	16.4mn
Mexico	14.4mn

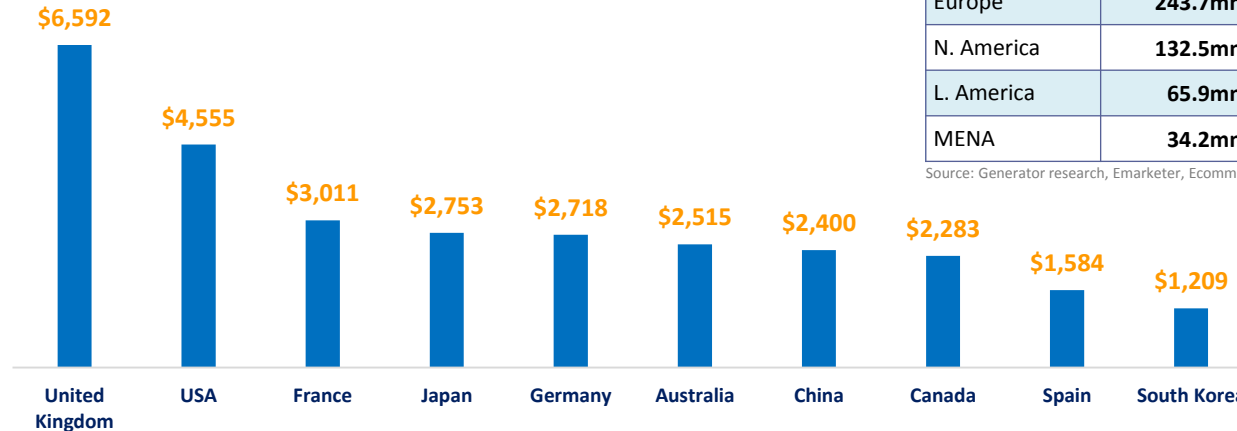
Source: Generator research, Ecommerce Foundation, 2015

Again, Asian countries dominate the ranking of number of e-households per country. After all, **China (224.2 million)**, **India (56.1 million)** and **Japan (49.2 million)** are all in the top 4.

However, with an average spending per e-household of **\$6,593** and **\$4,555**, respectively, the **Brits** and **Americans** remain the **biggest online spenders** in the world.

TOP 10 COUNTRIES IN TERMS OF AVERAGE SPENDING PER E-HOUSEHOLDS

Spending per online households, 2014



Source: Ecommerce Foundation, 2015

AVERAGE SPENDING PER E-HOUSEHOLDS PER REGION

Number of e-households of covered countries and spending per online household, 2014

Regions	Number of e-households	Average spending per e-households
Regions (excl. BRICS)	1050.5mn	\$1,848
Asia-Pacific	574.2mn	\$1,341
BRICS	361.3mn	\$1,678
Europe	243.7mn	\$2,320
N. America	132.5mn	\$3,946
L. America	65.9mn	\$567
MENA	34.2mn	\$614

Source: Generator research, Emarketer, Ecommerce Foundation, 2015

Social Media around the World

Global B2C E-commerce

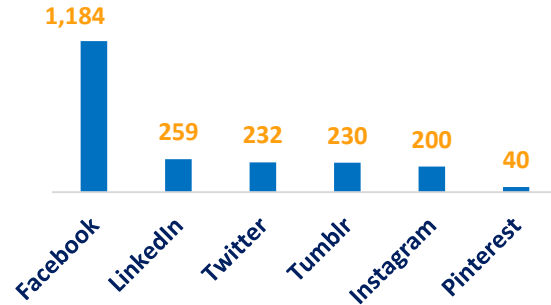
Social media

As was the case in 2013, **Facebook** was again the most popular social media platform in 2014. In total, **1.2 billion people** were active on Facebook.

LinkedIn ranked second with 259 million users, followed by Twitter with 232 million users. However, social media platforms such as Instagram and Pinterest are becoming more popular and grow significantly faster.

GLOBAL SOCIAL MEDIA SITES

Number of active users of the following social media websites, in millions of users, 2014



Source: Wearesocial, Adweek, 2015

Other social media

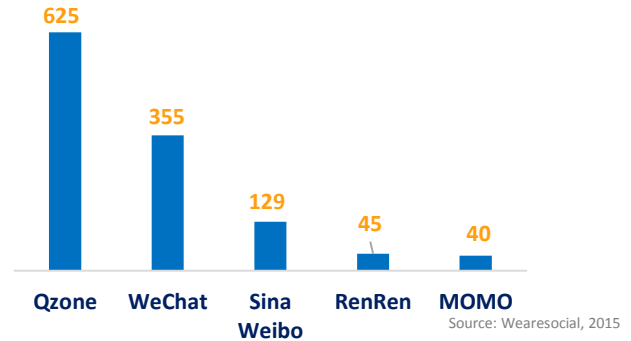
In addition to the global social media, several countries/regions have their own versions. Some of these are taken over or integrated in global giants, such as **Orkut**, which was particularly popular in India and Brazil but which has now been integrated in Facebook.

In other countries, “local” social media do survive and even attract a lot of users. For instance in **China**, where global websites such as Facebook and Twitter are banned by the government. Chinese companies use this to their advantage and because of the large population, there are many social media with hundreds of millions of registered users in China.

Another example is **Russia**, in which vKontakte and Odnoklassniki attract millions of people. In contrast with China, other social media are allowed in Russia, but these two are still the most popular ones.

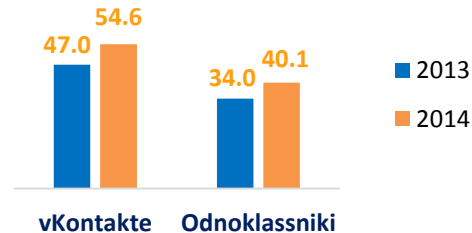
CHINESE SOCIAL MEDIA SITES

Number of active users of the following social media websites, in millions of users, 2014



RUSSIAN SOCIAL MEDIA SITES

Number of online people who use the following social media websites, in millions of users, 2013-2014



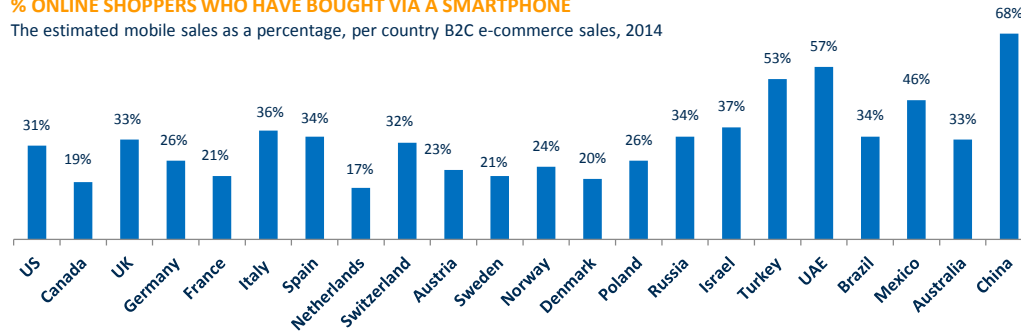
Source: Russiansearchtips, 2015

Mobile Commerce

Global B2C E-commerce

% ONLINE SHOPPERS WHO HAVE BOUGHT VIA A SMARTPHONE

The estimated mobile sales as a percentage, per country B2C e-commerce sales, 2014



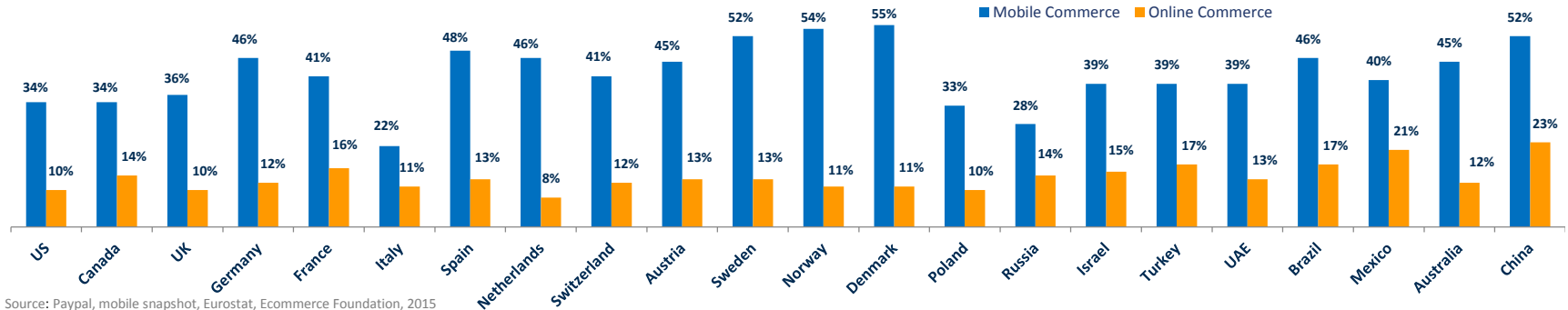
Mobile commerce

In **China**, **m-commerce** is already very popular. More than **two thirds** of Chinese e-shoppers have purchased an item through their smartphone. It is followed by **Turkey** and the **United Arab Emirates**, in which this rate amounts to more than **50%**.

In addition, it is interesting to note how much m-commerce turnover increased in comparison with online commerce turnover.

ESTIMATED MOBILE GROWTH RATE

The estimated mobile growth as a percentage per country



Source: Paypal, mobile snapshot, Eurostat, Ecommerce Foundation, 2015

Top Ranking M-commerce Retailers

Global B2C E-commerce

M-COMMERCE TURNOVER

Total online mobile turnover worldwide, 2013

Name Company	Country of origin	M-commerce turnover(2013)
Amazon	USA	\$16,800mn
Apple	USA	\$14,000mn
JD	China	\$5,800mn
Google Play	USA	\$4,400mn
QVC	USA	\$1,860mn
Walmart	USA	\$1,430mn
Otto	Germany	\$1,350mn
Suning Appliances	China	\$1,350mn
Sears	USA	\$900mn
Xiaomi	China	\$900mn

Source: Statista, 2014

Amazon biggest m-commerce company

The American e-commerce giant **Amazon** was the **best-selling m-commerce company** in the world in 2013. With a total annual turnover of **\$16.8bn** through mobile devices, such as smartphones and tablets, Amazon was ahead of **Apple** (**\$14.0bn**) and Chinese online shopping mall **JD** (**\$5.8bn**).

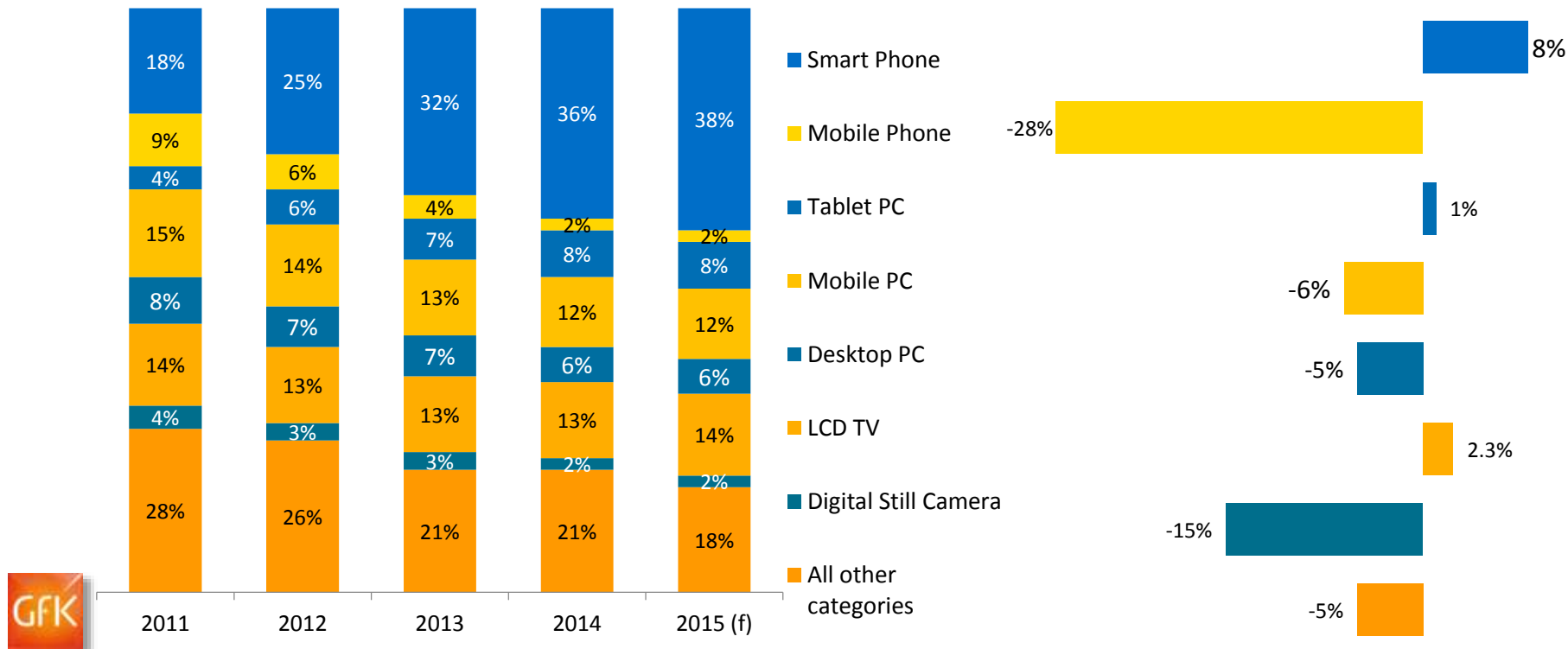
With a total m-commerce turnover of nearly **\$1.4bn**, German online shop **Otto** is the only European company in this top 10, which is mainly dominated by American companies. The difference between the top 2 companies and the rest is significant, but it is expected that particularly Chinese companies will more and more close this gap over the next few years.

Share and Growth of Online Devices

Global B2C E-commerce

SHARE AND GROWTH OF ONLINE DEVICES

The global share of several online device and their specific growth, 2014



© GfK 2014 | Source: Digital World by Boutique, in partnerships with the Consumer Electronics Association

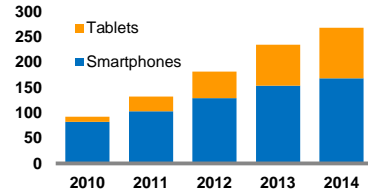
Usage of Smartphones and Tablets

Global B2C E-commerce

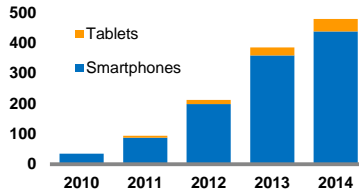
TABLETS AND SMARTPHONES

Overview of usage of mobile devices per region, in millions of US dollars

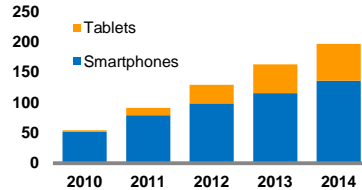
North America



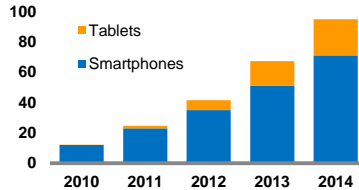
China



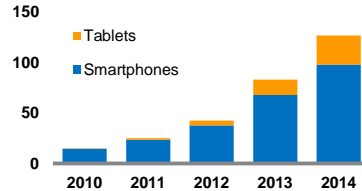
Western Europe



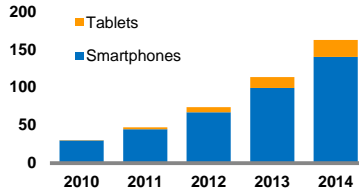
Eastern Europe



Latin America



MENA



Source: Total market including 2014 estimation by GfK Trends and Forecasting



Smartphones continue to dominate

When we look at the use of **mobile devices** in global regions, we see that **smartphones** remain the most important mobile device with regard to shopping through the Internet.

Especially in **China** and **MENA**, the popularity of tablets lags behind. However, **Europeans** and **North Americans** are more and more embracing tablets for buying goods and/or services online. This is evident from the growing share of e-commerce turnover made through tablets, which is shown in the tables on the left.

Smartphone sales increased by 48% in the developed world, but by 164% in the emerging countries

2015 Global Retail E-commerce Index

Global B2C E-commerce

Global Retail E-commerce Index

The **Global Retail E-commerce Index** is published annually by global management consulting firm A.T. Kearney and contains the top countries in terms of e-commerce performance. It ranks countries in four areas: **online market size**, consumer behavior, **growth potential** and **infrastructure**.

Even though China surpassed the United States with regard to B2C e-commerce turnover, the US is still the most attractive online market in the world, according to this index.

Belgian and Danish e-commerce on the rise

One of the most interesting aspect of this index is **the rise of Belgium**. The Western European country climbed **15 positions** in the global list and this was partly due to its score on growth potential. With this, Belgium is expected to continue to emerge in terms of B2C e-commerce.

Denmark also significantly improved its position as it rose by **13 positions** to the **15th place** in the global list. Among other things, the Northern European nation was the only country in the list to achieve **a perfect score for consumer behavior**. This indicates that Danish consumers are, for instance, tech-savvy and willing to spend money online.

GLOBAL RETAIL E-COMMERCE INDEX

Total global online market attractiveness, 2015

Rank	Change in global rank	Country	Online market size (40%)	Consumer behavior (20%)	Growth potential (20%)	Infrastructure (20%)	Online market attractiveness score (100%)
1	+2	United States	100.0	83.2	22.0	91.5	79.3
2	-1	China	100.0	59.4	86.1	43.6	77.8
3	+1	United Kingdom	87.9	98.6	11.3	86.4	74.4
4	-2	Japan	77.6	87.8	10.1	97.7	70.1
5	+1	Germany	63.9	92.6	29.5	83.1	66.6
6	+1	France	51.9	89.5	21.0	82.1	59.3
7	-2	South Korea	44.9	98.4	11.3	95.0	58.9
8	+5	Russia	29.6	66.4	51.8	66.2	48.7
9	+15	Belgium	8.3	82.0	48.3	81.1	45.6
10	-1	Australia	11.9	80.8	28.6	84.8	43.6
11	-1	Canada	10.6	81.4	23.6	88.9	43.1
12	+2	Hong Kong	2.3	93.6	13.0	100.0	42.2
13	+6	Netherlands	8.9	98.8	8.1	84.6	41.8
14	-3	Singapore	1.3	89.4	15.7	100.0	41.5
15	+13	Denmark	8.1	100.0	15.1	75.5	41.4

Source: Atkearney, 2015

Global Market Places

Global B2C E-commerce

Top 15 E-retailers in the US

Top e-retailers on the basis of e-commerce sales, in billions of US dollars, 2015



Source: Statista, 2015

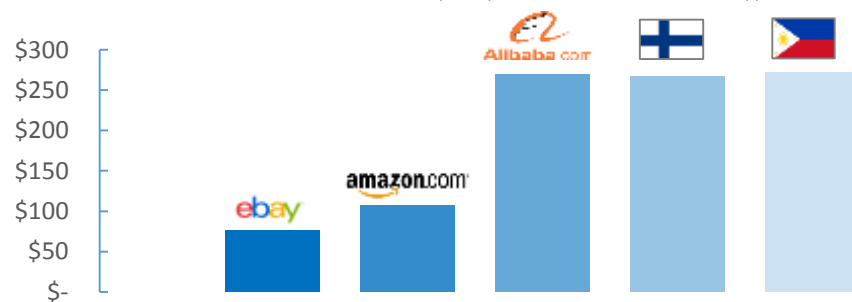
Rise of global market places

Global market places are online platforms on which companies (and consumers) sell goods and/or services. There are already a lot of different online market places, but the most famous ones are **Amazon**, **Alibaba** and **eBay**. Other important e-commerce platforms include **Facebook**, **Google**, **Flipkart** (India) and **MercadoLibre** (Argentina).

That market places are becoming increasingly important is evident from these two graphs. The one on the left shows that Amazon is already larger, in terms of e-commerce turnover, than the other companies in the American Top 12 of e-retailers combined. The graph below shows that Alibaba's **Gross Merchandise Volume**, or turnover that is facilitated on its platform, is about the same size as the Gross Domestic Products of countries such as **Finland** or the **Philippines**.

Gross Merchandise Volume

Gross Merchandise Volume of Alibaba, Amazon and eBay, compared to GDPs of Finland and Philippines, in billions of dollars, 2015



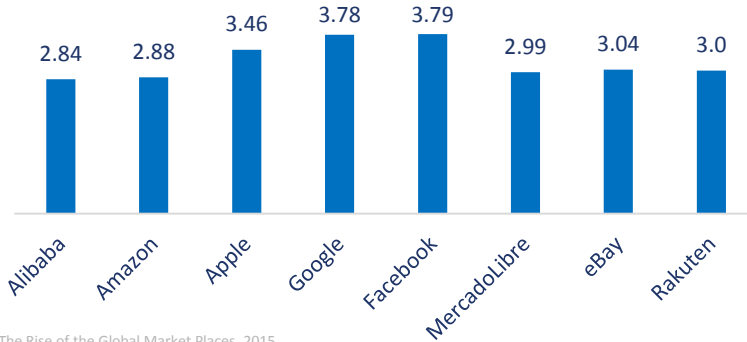
Source: en.wikipedia.org/wiki/List_of_countries_by_GDP_%28nominal%29, 2015

Global Market Places

Global B2C E-commerce

Influence of Online Market Places

Influence of market places according to retailers, with 1 being very negative and 5 being very positive, 2015



Source: The Rise of the Global Market Places, 2015



Retailers vs. market places

Global market places have become so important within online retail that they cannot be ignored anymore. Their influence in the market continues to grow. Research by the Ecommerce Foundation shows that retailers believe that global market places will own **40% of the global online retail market** in 2020.

Still, retailers are very positive about their future and they are mostly positive about the influence of market places. According to the aforementioned **Rise of the Global Market Places** study, especially the impact of **Apple**, **Google** and **Facebook** is met with confidence by retailers. The main reason for this confidence is because retailers believe they perform better than online market places, especially in customer-facing processes.

Dealing with online market places

However, online market places also pose a threat to other retailers, as they can offer **lower prices** and **larger ranges** to customers. Still, online retailers can definitely benefit from the e-commerce platforms.

For instance, market places can be of great help when an online shop wants to expand its business **cross-border**. At relatively low costs, companies can offer their goods and/or services to foreign consumers without having to set up an office abroad or translating their website first.

For more detailed information about global market places, please go to ecommercefoundation.org for the **Rise of the Global Market Places** report.

Regional and National B2C E-commerce

Overview of the Regional and National E-commerce Markets



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Legend: Explanatory Notes

Global B2C E-commerce

Country pages

On the following pages, you will find an overview of the most important e-commerce markets, both mature and emerging, in the world. On each page, a country will be covered through several figures and graphs, as shown to the right. Here you will find a short explanation of these graphs.

Economic indicators

Through the three economic indicators GDP growth rate, inflation rate and unemployment rate, we want to provide an overview of the economic situation of a country, in comparison with the global averages. The growth rate of the Gross Domestic Product shows how much the size of the country's economy increased, while the inflation rate is how much prices have grown in a country. The unemployment rate is the percentage of people without a job.

Share of e-commerce in GDP

The share of e-commerce turnover in the GDP shows the influence of e-commerce in a country's total economy.

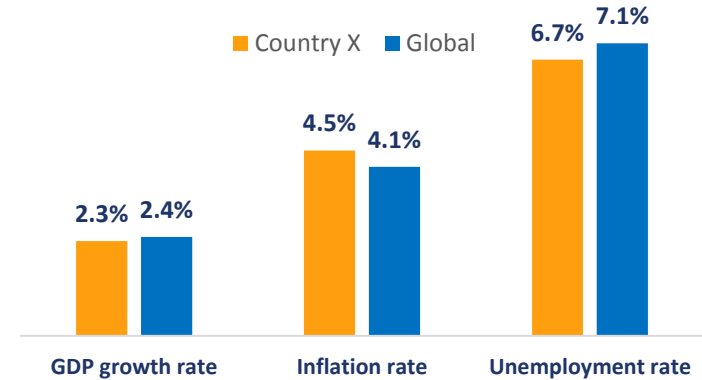
Share of e-shoppers in population

The percentage of online shoppers in the total population, therefore indicating what share of the inhabitants is interested in online shopping.

Share of online spending per e-shopper in GDP per capita

Comparable with the eGDP, but this figure shows how much an e-shopper on average is willing to spend of the GDP per capita, or size of the economy per inhabitant.

Country X vs. Global Averages



National E-commerce Shares



North America

An Overview of E-commerce Markets in North America



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North America \$522.9 bn +12.2%

Asia-Pacific \$770.0 bn +44.3%

Europe \$565.4 bn +15.3%

Latin America \$37.4 bn +18.2%

MENA \$21.0 bn +21.5%

Total B2C E-commerce of Goods & Services 2014

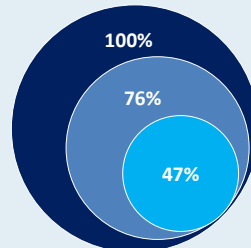
North America
\$522.9bn 12.2%



Total GDP \$ 20,488 bn



Average spending
per e-shopper



478 million
people live in North America

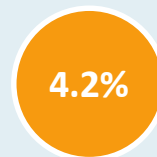
365 million
people use the Internet

227 million
people are e-shoppers

Forecast 2015

\$ 589bn

Turnover E-commerce
Goods & Services



Estimated share of
online goods in
total retail of goods



Estimated 64% of active Internet users are
on social media

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National e-commerce associations:



Canada



United States



Mexico



Ranking covered countries in turnover (USD million)

1		United States	\$ 482,650
2		Canada	\$ 27,820
3		Mexico	\$ 12,381

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B2C E-commerce Turnover and Growth

North America

North America

Total B2C e-commerce sales in the region reached **\$522.9bn** in 2014, an increase of **12.2%** compared to 2013. The number of **Internet users** reached around **365 million** by the end of 2014, while the number of **e-shoppers** was nearly **227 million (61% of the Internet users)**. As a result, the **average spending per e-shopper** was around **\$2,306**. At **\$2,475**, the average spending per e-shopper was highest in the USA, followed by Canada (**\$1,717**) and Mexico (**\$799**).

NORTH AMERICAN B2C E-COMMERCE TURNOVER, 2011 - 2015

Countries	2011	2012	2013	Growth	2014	Growth	2015 (f)	Growth
USA	\$347.1bn	\$382.1bn	\$432.3bn	13.1%	\$482.7bn	11.7%	\$540.7bn	12.0%
Canada	\$18.3bn	\$21.0bn	\$24.2bn	15.6%	\$27.8bn	14.8%	\$31.3bn	12.6%
Mexico	\$4.2bn	\$6.7bn	\$9.5n	41.4%	\$12.4bn	30.0%	\$16.6bn	34.0%

Source: Ecommerce Foundation, 2015



12.2%

Growth of
North America's B2C
e-commerce in 2014

E-commerce Markets

North America



319 million



Dollar (USD)



5.0%
(General Sales Tax, GST)



United States of America (USA)

The United States of America is in all aspects a mature e-commerce market. For instance, a fast majority of its citizens (**87%**) was connected to the Internet in 2014. In addition, nearly two thirds (**61%**) of the total American population purchased goods and/or services online last year.

As of 2014, the United States is no longer the largest B2C e-commerce market in the world, as it is surpassed by China. Still, it remains the world's leading importer and exporter of cross-border e-commerce goods.

In this regard it is interesting to see China and the UK are the most popular countries for American cross-border e-commerce. For instance, 84% of American cross-border retailers sell goods and/or services to China, while nearly half of the American cross-border e-shoppers find their way to British online retailers.

Gross Domestic Product

\$ 17.4 trillion

Internet penetration

87%

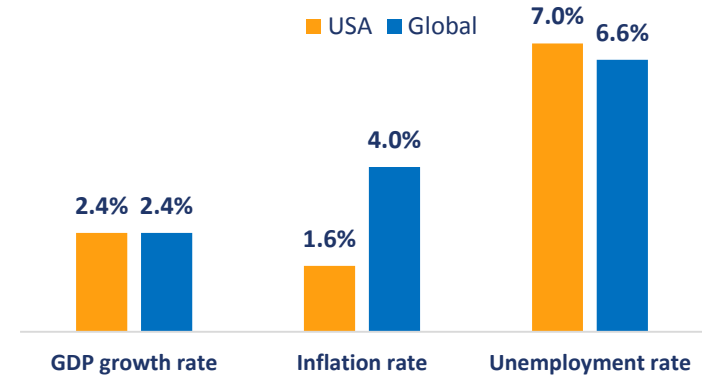
Online population

279 million

Average spending per American e-shopper

\$ 2,475

USA vs. Global Averages



National E-commerce Shares



E-commerce Markets

North America



36 million



Dollar (CAD)



5.0%
(General Sales Tax, GST)



Canada

Even though the US economy is many times larger than the Canadian one, they are still comparable. For instance, their GDP growth, inflation and unemployment rates are nearly similar. In terms of Nationals E-commerce Shares, as well as in average spending per e-shopper, Canada is lagging behind a little. However, the fact that nearly half of all Canadians have purchased something through the Internet indicates that e-commerce is becoming an integral part of Canadian life.

Cultural differences have often been cited among the factors behind the slower progress of Internet shopping in Canada. Another reason is the fact that Canadian companies are in general still reluctant to use the Internet to promote their business.

Gross Domestic Product

\$ 1.8 trillion

Internet penetration

87%

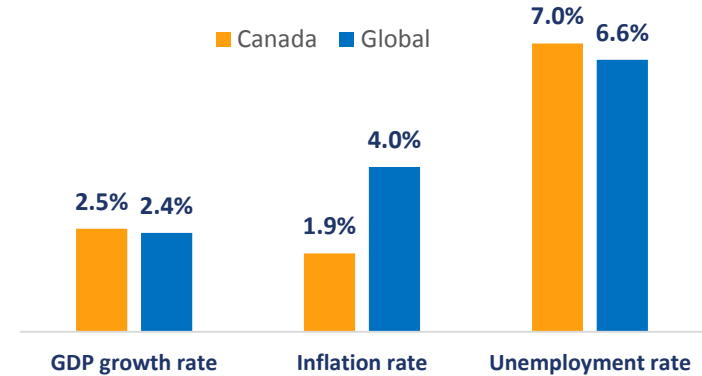
Online population

31 million

Average spending per
Canadian e-shopper

\$ 1,717

Canada vs. Global Averages



National E-commerce Shares



E-commerce Markets

North America



Mexico

The Mexican economy is performing reasonably well and is the 15th largest economy in the world. In terms of GDP growth rate and inflation rate, Mexico scores a little below the global average, while the Unemployment Rate is even clearly below the worldwide average.

When looking at the National E-commerce Shares in Mexico, it is clear that this e-commerce market is still in its infant years. The outlook is nevertheless promising; even though the eGDP and share of e-shoppers in the total population are significantly lower than in the other countries within this region, the share of online spending per e-shopper in the GDP per capita is clearly higher. This indicates that Mexicans are willing to spend a relatively high amount of their earning online, which forms a good base for successful e-commerce.

Gross Domestic Product

\$ 1.3 trillion

Internet penetration

44%

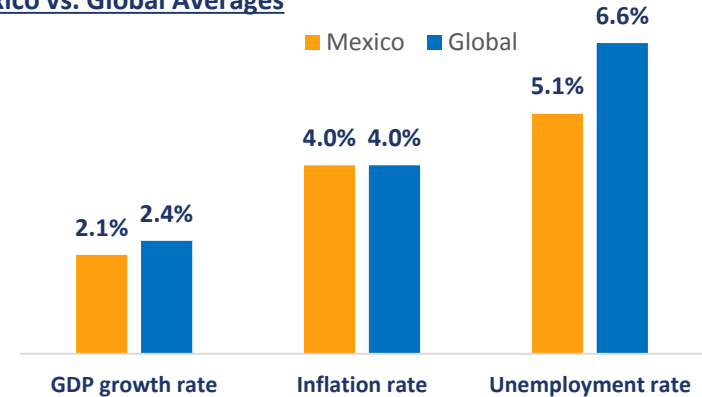
Online population

55 million

Average spending per Mexican e-shopper

\$ 799

Mexico vs. Global Averages



National E-commerce Shares



Latin America

An Overview of E-commerce Markets in Latin America



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Ecommerce
FOUNDATION



Latin America \$37.4 bn +18.2%

Asia-Pacific \$770.0 bn +44.3%

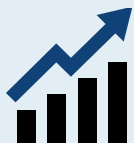
Europe \$565.4 bn +15.3%

North America \$522.9 bn +12.2%

MENA \$21.0 bn +21.5%

Total B2C E-commerce of Goods & Services 2014

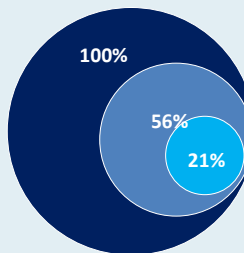
Latin America
\$ 37.4bn 18.2%



eGDP
0.83%

Total GDP \$ 4,494 bn

Average spending
per e-shopper



394 million
people live in Latin America
221 million
people use the Internet
83 million
people are e-shoppers

Forecast 2015

\$ 44bn

Turnover E-commerce
Goods & Services



2.1%

Estimated share of
online goods in
total retail of goods

Ranking covered countries
in turnover (USD million)

1		Brazil	\$ 20,970
2		Argentina	\$ 4,450
3		Chile	\$ 2,000



Estimated 57% of active Internet users are
on social media

National e-commerce associations:



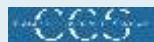
Brazil



Argentina



Chili



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B2C E-commerce Turnover and Growth

Latin America

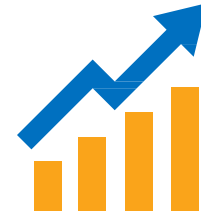
Latin America

E-commerce is among the **fastest-growing industries** in **Latin America**, making it an attractive place for numerous entrepreneurs from the region and all over the globe. The total volume of e-commerce in the Latin American region is estimated to have reached **\$37.4bn** in 2014. This represents a growth of **18.2%** compared to 2013. It is interesting to see that the growth rates of the three most important Latin American B2C e-commerce markets are all expected to have **double-digit growth rates** in 2015, confirming that Latin America is a **real emerging B2C e-commerce market**.

LATIN AMERICAN E-COMMERCE TURNOVER, 2011 - 2015

Countries	2011	2012	2013	Growth	2014	Growth	2015 (f)	Growth
Brazil	\$9.1bn	\$15.8bn	\$18.6bn	17.3%	\$21.0bn	12.9%	\$23.5bn	12.0%
Chile	\$1.0bn	\$1.3bn	\$1.6bn	23.0%	\$2.0bn	25.0%	\$2.4bn	22.0%
Argentina	\$2.6bn	\$3.5bn	\$3.7bn	6.3%	\$4.5bn	20.2%	\$5.2bn	17.9%

Source: Ecommerce Foundation, 2015

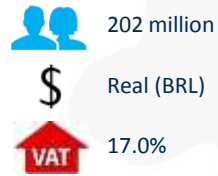


18.2%

Growth of
Latin America's B2C
e-commerce in 2014

E-commerce Markets

Latin America



Brazil

The Brazilian economy is facing difficult times, which is evidenced by the low GDP growth rate and high inflation rate. With regard to the National E-commerce Shares, Brazil is clearly an emerging market, with the 5.5% share of online spending per e-shopper in GDP per capita being a positive sign for e-commerce growth.

Gross Domestic Product
\$ 2.3 trillion

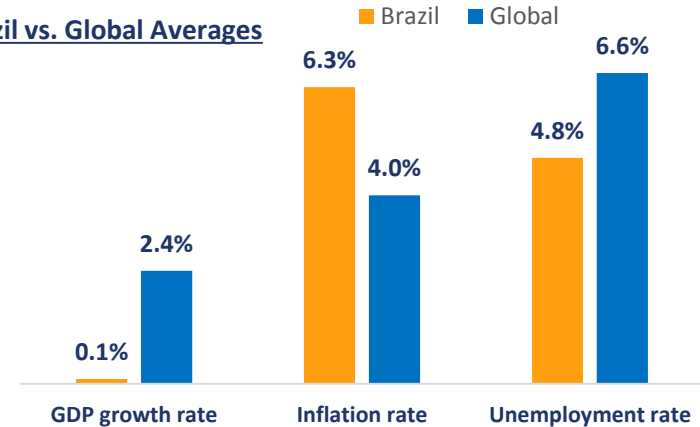
Internet penetration
58%

Online population
116 million

Average spending per
Brazilian e-shopper
\$ 635

On the other hand, the Brazilian unemployment rate was clearly below the global average. One reason for many Brazilians having a job in 2014 might be that Brazil organized the Fifa World Championship in 2014 and will host the 2016 Summer Olympics. In general, these events generate a lot of jobs, but these are often of a temporary nature. Therefore, it is interesting to see what the Unemployment Rate will do after the 2016 Summer Olympics.

Brazil vs. Global Averages



National E-commerce Shares



E-commerce Markets

Latin America



42 million

Peso (ARS)

21.0%



Argentina

Just like its neighbor Brazil, the Argentinian economy is struggling. Especially the inflation rate of 18.6%, more than four times the global average, is alarming. As a result, Argentinian consumers are faced with higher costs for food, rents and services, among other things. In addition, the fact that the GDP grew by just 0.5% last year makes the Argentinian economic situation even more worrisome.

In terms of e-commerce, Argentina is in many aspects an emerging market, with a low Internet penetration, a low eGDP and a high e-commerce turnover growth rate. In addition, the share of e-shoppers in the total population is already relatively high, which forms a sound basis for the Argentinian e-commerce market.

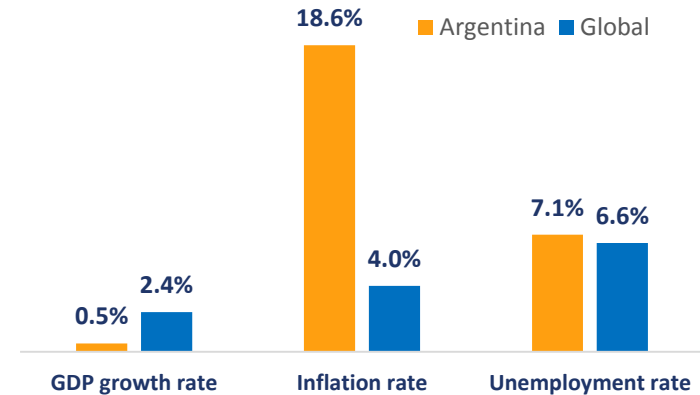
Gross Domestic Product
\$ 540 billion

Internet penetration
65%

Online population
27 million

Average spending per
Argentinian e-shopper
\$ 342

Argentina vs. Global Averages



National E-commerce Shares



E-commerce Markets

Latin America



18 million



Peso (CLP)



19.0%

Gross Domestic Product

\$ 258 billion

Internet penetration

72%

Online population

13 million

Average spending per
Chilean e-shopper

\$ 377



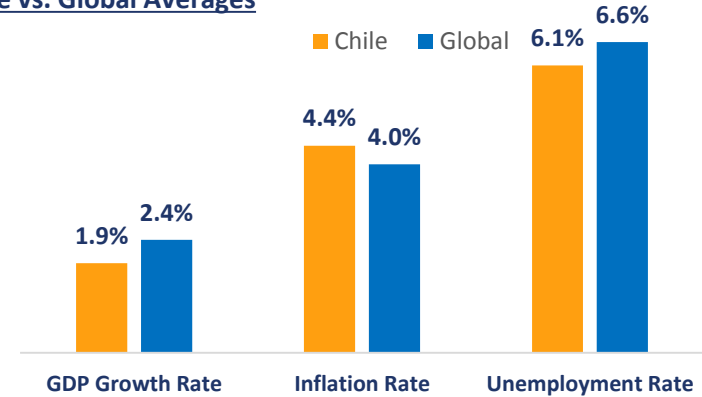
Chile

Chile is a rapidly increasing e-commerce market. In fact, it is ranked first in the Global Retail Development Index, which shows that this country provides a lot of changes for domestic and foreign online and other retailers.

The share of e-commerce in the country's Gross Domestic Product is still quite low, but in line with the other B2C e-commerce markets in the region. However, just as in Argentina, the share of e-shoppers in the Chilean population form a good basis for B2C e-commerce.

The Chilean economy is performing rather well, especially when compared to those of the other two major B2C e-commerce markets in Latin America. In the categories of GDP growth rate, inflation rate and unemployment rate, Chile scores around the global average. As a result, the country is considered one of Latin America's most stable and prosperous nations.

Chile vs. Global Averages



National E-commerce Shares



Europe

An Overview of E-commerce Markets in Europe



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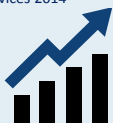
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Europe \$565.4 bn +15.3%
 Asia-Pacific \$770.0 bn +44.3%
 North America \$522.9 bn +12.2%
 Latin America \$37.4 bn +18.2%
 MENA \$21.0 bn +21.5%

Total B2C E-commerce of Goods & Services 2014

Europe
 \$ 565.4bn 15.3%



National e-commerce associations:



Germany



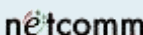
France



Spain



Italy



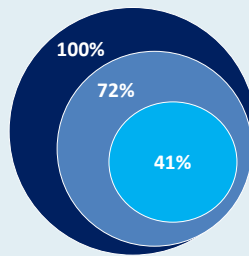
Average spending
 per e-shopper



\$ 1,681

eGDP
 2.49%

Total GDP \$ 22,663 bn



817 million
 people live in Europe
 587 million
 people use the Internet
 336 million
 people are e-shoppers

Forecast 2015
 \$ 638bn
 Turnover E-commerce
 Goods & Services



244mn
 e-households

Ranking covered countries
 in turnover (USD million)

- 1  United Kingdom \$ 168,972
- 2  Germany \$ 94,589
- 3  France \$ 75,459
- 4  Russia \$ 24,976
- 5  Spain \$ 22,452
- 6  Italy \$ 17,640

7.2%
 Estimated share of
 online goods in
 total retail of goods



"Estimated 56% of active Internet
 users are on social media"

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B2C E-commerce Turnover and Growth

Europe



Turnover of
Europe is forecast
to grow to
\$637.7bn
in 2015

Europe

Europe remains the second-largest B2C e-commerce market in the world. In 2014, European B2C e-commerce – including online travel bookings, events tickets and downloads – grew by **15.3%** to **\$565.4bn**. The three largest European countries, the **UK**, **Germany** and **France**, continue to dominate the European B2C e-commerce market with a share of **67%**. However, **Russia** is on the rise, which is also evidenced by its expected growth rate of **22%** in 2015.

EUROPEAN B2C E-COMMERCE TURNOVER, 2011 - 2015

Countries	2011	2012	2013	Growth	2014	Growth	2015 (f)	Growth
Germany	\$54.6bn	\$66.4bn	\$84.2bn	26.8%	\$94.6bn	12.3%	\$106.3bn	12.4%
France	\$50.1bn	\$59.8bn	\$67.9bn	13.6%	\$75.5bn	11.2%	\$82.9bn	9.9%
Spain	\$14.5bn	\$17.2bn	\$19.1bn	11.1%	\$22.5bn	17.2%	\$25.2bn	12.4%
United Kingdom	\$111.7bn	\$127.8bn	\$142.4bn	11.4%	\$169.0bn	18.7%	\$191.2bn	13.1%
Italy	\$10.7bn	\$12.7bn	\$15.0bn	18.2%	\$17.6bn	17.5%	\$20.3bn	15.2%
Russia	\$10.3bn	\$13.7bn	\$20.6bn	50.5%	\$25.0bn	21.3%	\$30.6bn	22.3%

Source: Ecommerce Foundation, 2015

E-commerce Markets

Europe



64 million



Pound (GBP)



20.0%

Gross Domestic Product

\$ 2.9 trillion

Internet penetration

92%

Online population

59 million

Average spending per
British e-shopper

\$ 3,204



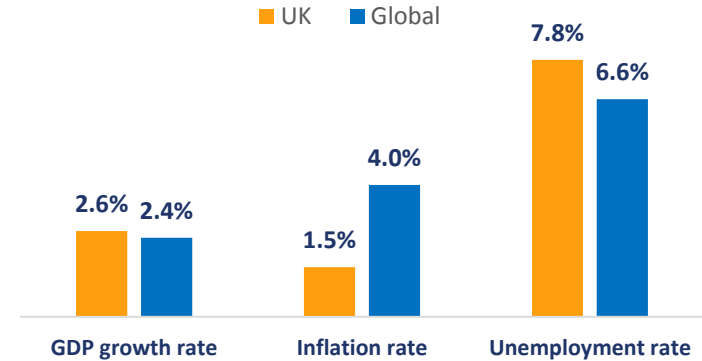
United Kingdom (UK)

The United Kingdom is Europe's second-largest economy and it performed reasonably well in this regard last year. For instance, the British GDP grew by more than global average and the inflation rate was better than in many other European countries.

The UK is the largest e-commerce market within Europe. The importance of British B2C e-commerce is shown in the National E-commerce Shares, which are all Europe's highest rates. Combined with the fact that British B2C e-commerce is still growing with double digits, it can be concluded that the UK will remain Europe's most important B2C e-commerce market for the years to come.

The UK is Europe's largest mobile commerce market. Of the total of around **\$31.6bn** spent through a mobile device in Europe, **\$13.3bn**, or **42%**, was spent in the UK. In total, 41% of all British online retail transactions was made through a mobile device.

UK vs. Global Averages



National E-commerce Shares



E-commerce Markets

Europe



Germany

Germany is the largest national economy of Europe and the fourth-largest by nominal GDP in the world. What is striking in terms of the economy is the low German inflation rate. At **0.8%**, this figure was well below the global average of **4.1%** last year and was the lowest German rate in years. As a result, Germany was well below the rate of **2%** that the European Central Bank is necessary for healthy economic growth.

In terms of B2C e-commerce, Germany is a mature market with a healthy double-digit turnover growth. In total, more than three quarters of the German population purchased goods and/or services online in 2014, which was one of the highest rates in the world.

Gross Domestic Product

\$ 3.9 trillion

Internet penetration

86%

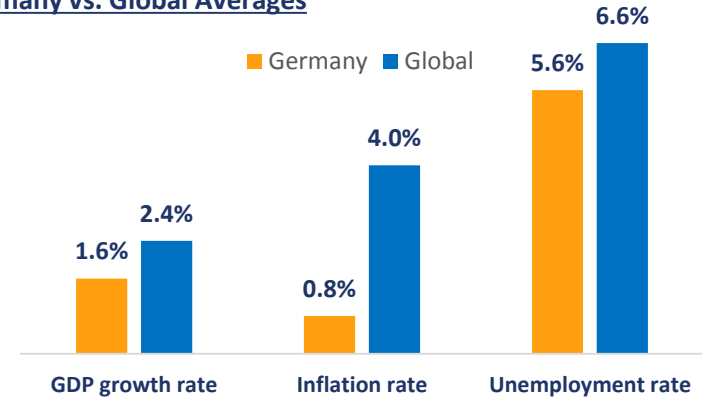
Online population

70 million

Average spending per German e-shopper

\$ 1,541

Germany vs. Global Averages



National E-commerce Shares



E-commerce Markets

Europe



66 million



Euro (EUR)



20.0%



France

The French economy found itself in dire straits last year. Not only did the GDP grow by just **0.2%** and did the inflation rate amounted to **0.6%**, but unemployment also reached **11.0%**, which was far above the global average. However, the first figures from 2015 indicate that the French economy is slowly recovering.

Gross Domestic Product

\$ 2.8 trillion

Internet penetration

84%

Online population

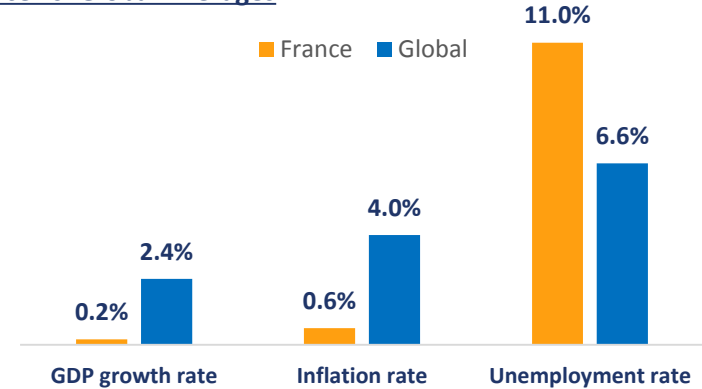
55 million

Average spending per French e-shopper

\$ 2,126

In terms of B2C e-commerce, France belongs to the most important countries in Europe. This is also evidenced by the National E-commerce Shares. Together with the high average spending per French e-shopper, it is clear that B2C e-commerce plays an important part in the French economy.

France vs. Global Averages



National E-commerce Shares



E-commerce Markets

Europe



47 million



Euro (EUR)



21.0%



Spain

Just like in several other Southern European countries, the Spanish economy was hit hard by the economic crisis of a few years ago. Slowly but surely, Spain is getting back to its feet, and in 2014 its GDP already grew by 1.4%, which is quite high when compared to other countries in the region. However, the negative inflation rate and the rocketing unemployment rate show that Spain is not yet out of the woods.

B2C e-commerce is clearly becoming more and more important in Spain. Among other things, this is evidenced by the yearly double-digit growth of B2C e-commerce turnover and the fact that the share of e-shoppers in the Spanish population grew significantly over the last few years, from 29.3% in 2010 to 43.1% in 2014.

Gross Domestic Product

\$ 1.4 trillion

Internet penetration

76%

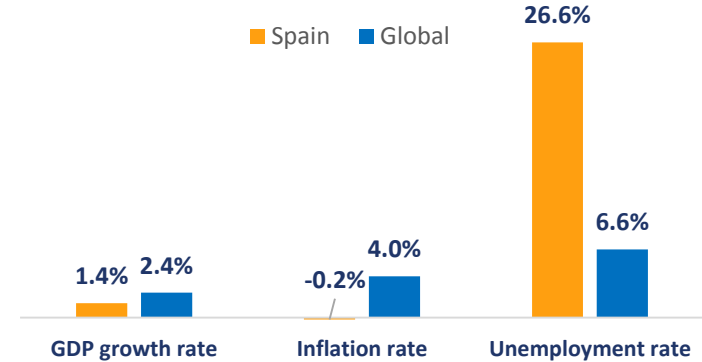
Online population

35 million

Average spending per Spanish e-shopper

\$ 1,123

Spain vs. Global Averages



National E-commerce Shares



E-commerce Markets

Europe



61 million



Euro (EUR)



22.0%



Italy

Just like Spain, Italy is still dealing with the consequences of the financial crisis. Unfortunately, they are not where they would like to be, given the low inflation rate and the fact that the Italian GDP even declined a little. In addition, the unemployment rate is also far above the global average.

In terms of B2C e-commerce, Italy is clearly an emerging country, which is evidenced by the double-digit growth of B2C e-commerce sales, as well as by the relatively low National E-commerce Shares. There is still enough room for growth in these three rates, especially when Italy is able to increase its Internet penetration rate of just 62%.

Gross Domestic Product

\$ 2.1 trillion

Internet penetration

62%

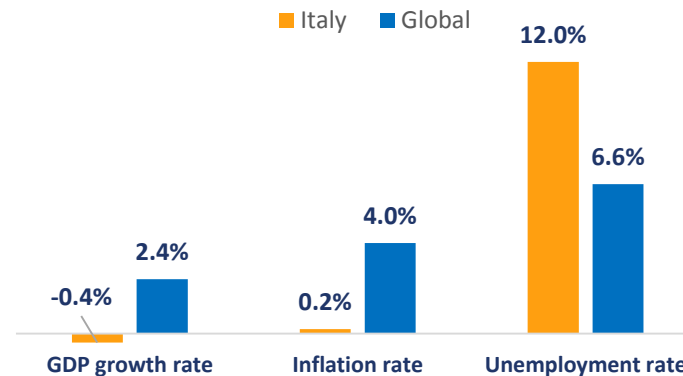
Online population

38 million

Average spending per Italian e-shopper

\$ 1,076

Italy vs. Global Averages



National E-commerce Shares



E-commerce Markets

Europe



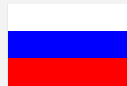
144 million



Ruble (RUB)



18.0%



Russia

The Russian economy grew by a little more than the global average last year, but the inflation rate was considerably higher than the worldwide average. As a result, daily life was relatively expensive for Russians in 2014, as the costs for food, rents and services, among other things, increased.

With regard to B2C e-commerce, Russia is a sleeping giant, which is slowly waking up. Since 2010, the Russian B2C e-commerce turnover more than tripled and the share of e-commerce in the GDP more than doubled. More and more people are finding the way to the Internet for their purchases, and in 2014 around 28 million Russian bought goods and/or services online.

Gross Domestic Product

\$ 2.1 trillion

Internet penetration

71%

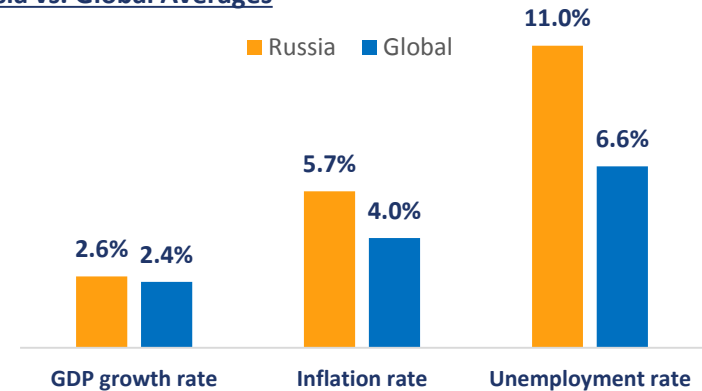
Online population

101 million

Average spending per Russian e-shopper

\$ 892

Russia vs. Global Averages



National E-commerce Shares



Asia-Pacific

An Overview of E-commerce Markets in Asia-Pacific



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Asia-Pacific \$770.0 bn +44.3%

Europe \$565.4 bn +15.3%

North America \$522.9 bn +12.2%

Latin America \$37.4 bn +18.2%

MENA \$21.0 bn +21.5%

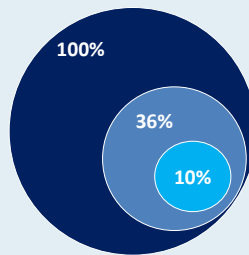
Total B2C E-commerce of Goods & Services 2014

Asia-Pacific
\$ 770.0bn 44.3%



Total GDP \$ 23,215 bn

Average spending
per e-shopper



5,095 million
people live in Asia Pacific
1,825 million
people use the Internet
523 million
people are e-shoppers

Forecast 2015
\$ 926bn
Turnover E-commerce
Goods & Services



5.4%

Estimated share of
online goods in
total retail of goods

Ranking covered Countries
in turnover (USD million)

1		China	\$ 538,128
2		Japan	\$ 135,507
3		Australia	\$ 21,000
4		South Korea	\$ 20,240
5		India	\$ 19,396
6		Indonesia	\$ 2,883



Estimated 53% of active Internet users are
on social media

National e-commerce associations:



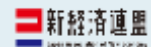
Australia



China



Japan



India



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B2C E-commerce Turnover and Growth

Asia-Pacific

Asia-Pacific

The Asia-Pacific region is the strongest e-commerce region in the world, and this is to a very large degree thanks to China. This country has been developing itself very well over the last few years and this is evident from the growth in B2C e-commerce turnover. With **\$538.1bn**, China was clearly the **leading market** in the region in 2014, followed by **Japan (\$135.5bn)**, **Australia (\$21.0bn)**, **South Korea (\$20.2bn)** and **India (\$19.4bn)**. India is one of the most important emerging B2C e-commerce markets within Asia-Pacific, and it will not be long before it will surpass South Korea and Australia in this ranking.

ASIAN-PACIFIC B2C E-COMMERCE TURNOVER, 2011 - 2015

Countries	2011	2012	2013	Growth	2014	Growth	2015 (f)	Growth
China	\$95.0bn	\$184.0bn	\$328.5bn	78.5%	\$538.1bn	63.8%	\$654.4bn	21.6%
Japan	\$98.5bn	\$110.3bn	\$118.6bn	7.6%	\$135.5bn	14.2%	\$156.8bn	15.7%
India	\$8.2bn	\$12.1bn	\$16.1bn	32.5%	\$19.4bn	20.8%	\$23.7bn	22.0%
Australia	\$13.9n	\$16.0bn	\$18.4bn	15.0%	\$21.0bn	14.1%	\$23.8bn	13.3%
South Korea	\$16.3bn	\$17.3bn	\$18.5bn	6.9%	\$20.2bn	9.3%	\$21.9bn	8.3%

Source: Ecommerce Foundation, 2015



44.3%

Growth of
Asia-Pacific's B2C
e-commerce in 2014

E-commerce Markets

Asia-Pacific

 1,364 million

 Yuan (CNY)

 17.0%

Gross Domestic Product
\$ 10.4 trillion

Internet penetration
49%

Online population
673 million

Average spending per
Chinese e-shopper
\$ 1,703

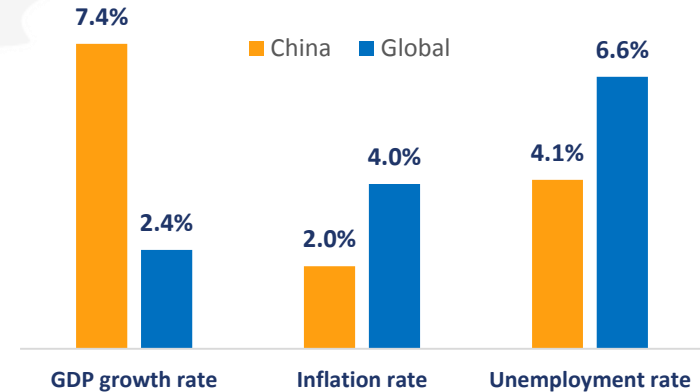


China

China is the second-largest economy in the world as well as the world's fastest-growing major economy. In 2014, the GDP grew by more than three times the global average and the inflation rate amounted to a healthy **2.0%**. In addition, the unemployment rate has been a low **4.1%** for a number of years now.

As of 2014, China is the largest B2C e-commerce market, as it surpassed the United States. It achieved a B2C e-commerce turnover of \$522.9bn, making it the first country to reach the \$500 billion milestone. It is interesting to see that China is able to achieve this result with less than half the population being connected to the Internet. If the country is able to increase this penetration rate, the B2C e-commerce turnover will grow even faster. Especially because Chinese e-shoppers are spending more and more online, from \$1,087 in 2013 to \$1,703 in 2014.

China vs. Global Averages



National E-commerce Shares



E-commerce Markets

Asia-Pacific



127 million



Yen (JPY)



8.0%
(Consumption Tax, CT)



Japan

Japan is the third-largest economy in the world, but it did not flourish last year. As a matter of fact, the Gross Domestic Product even decreased very slightly. Still, in terms of inflation and unemployment, Japan did score properly.

In terms of B2C e-commerce, Japan is a mature market, with a high Internet penetration rate, many e-shoppers and a relatively high share of e-commerce in its GDP. Therefore it is somewhat striking to see that Japan's B2C e-commerce turnover growth nearly doubled, from 7.6% in 2013 to 14.2% last year. For 2015, this growth rate is expected to continue to grow, to 15.7%.

In terms of mobile commerce, Japan is in the lead globally. In total, nearly half (49%) of all Japanese online retail transactions was made through a mobile device, such as a smartphone or tablet, in 2014.

Gross Domestic Product

\$ 4.6 trillion

Internet penetration

91%

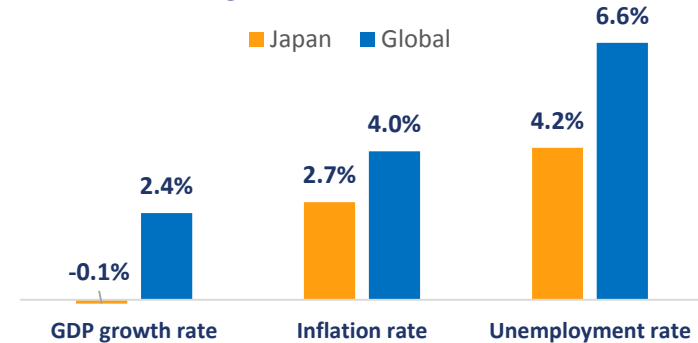
Online population

115 million

Average spending per Japanese e-shopper

\$ 1,737

Japan vs. Global Averages



National E-commerce Shares



E-commerce Markets

Asia-Pacific



1,267 million



Rupee (INR)



12.5% (Service Tax)



India

The Indian economy grew significantly last year, as the GDP increased by more than three times the global average last year. However, the inflation rate was also considerably higher than the worldwide average, as the general price levels increased by 6.4%.

In terms of B2C e-commerce, India finds itself where China was a number of years ago. In other words, it is still in its infancy, but the Indian B2C e-commerce market is expected to grow very hard in the near future.

Despite an Internet penetration rate of just 18%, Indian B2C e-commerce sales grew every year by more than 20% over the last few years. In addition, Indian e-shoppers are willing to spend money online, as on average, they spend more than 40% of the GDP per capita.

Gross Domestic Product

\$ 2.1 trillion

Internet penetration

18%

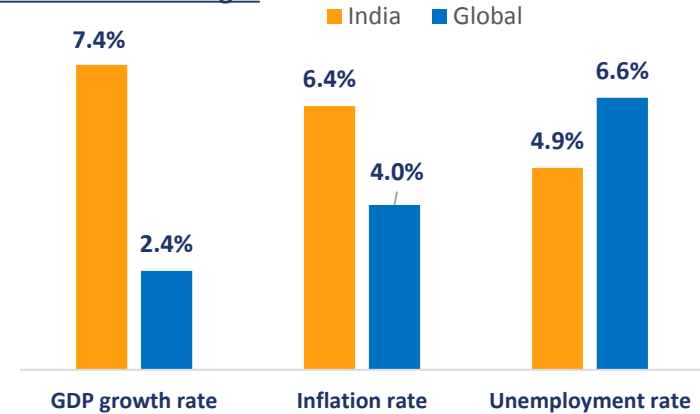
Online population

228 million

Average spending per Indian e-shopper

\$ 657

India vs. Global Averages



National E-commerce Shares



E-commerce Markets

Asia-Pacific



23 million



Dollar (AUD)



10.0% (Goods and Services Tax, GST)



Australia

The Australian economy is the 12th-largest in the world and last year, it performed on par with or even a little better than the global averages.

Australian e-commerce developed steadily over the last few years, with an average growth of about 15% per year. However, last year, this rate slightly decreased and this declining trend is expected to continue in 2015. This is an indication that the Australian e-commerce market is becoming more and more mature.

Australians buy a lot from foreign online retailers, partly due to the fact that there are only a relatively small number of domestic players. Another reason to buy cross-border is the fact that the first **US\$861** in purchases made from a foreign retailer may enter the country duty-free as an exemption of the so-called Goods and Services Tax (GST).

Gross Domestic Product

\$ 1.5 trillion

Internet penetration

85%

Online population

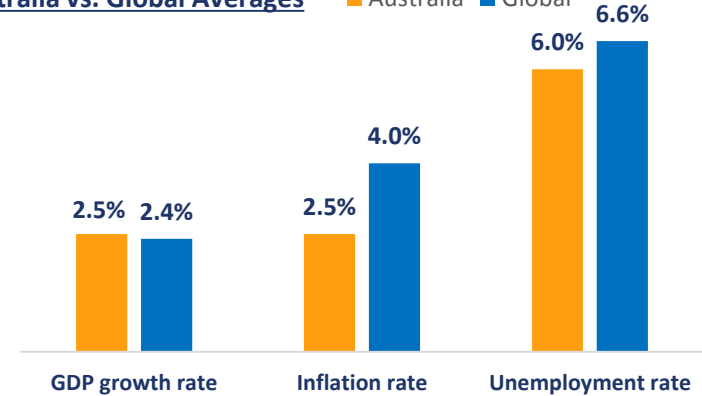
20 million

Average spending per Australian e-shopper

\$ 1,239

Australia vs. Global Averages

■ Australia ■ Global



National E-commerce Shares



E-commerce Markets

Asia-Pacific



50 million



Won (KRW)



10.0%

Gross Domestic Product

\$ 1.4 trillion

Internet penetration

84%

Online population

43 million

Average spending per
South Korean e-shopper

\$ 750



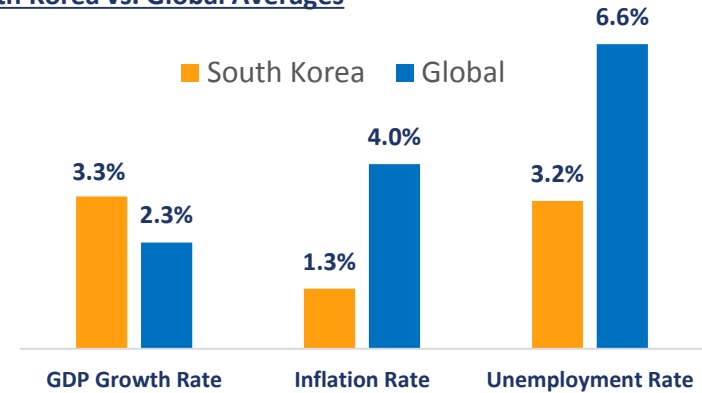
South Korea

South Korea is a strong economy and ranked 11th with regard to the Gross Domestic Product last year. Especially South Korea's low unemployment is striking, as this rate is nearly three times as low as the global average.

Regarding B2C e-commerce, South Korea is a mature market. This is evidenced by a low B2C e-commerce sales growth rate. As a matter of fact, South Korea is the only major Asian-Pacific country with a single-digit growth rate here.

South Korea ranked second in terms of mobile commerce rate last year. No less than 45% of all online retail transactions was made through a mobile device in South Korea. This is clearly above the global average of 30%.

South Korea vs. Global Averages



National E-commerce Shares



Trends and Overviews

Trends of B2C Global E-commerce Turnover of Goods & Services and Overview Tables



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Global E-commerce Trends

Overview and Forecast

E-commerce trends

Around the world, we see several trends in B2C e-commerce. These include the following:

- a fast-moving shift from C2C to B2C in several countries, such as China and Turkey;
- increased offering, as more and more (domestic) retailers go online;
- a growing number of e-shoppers: in 2014 the global number of e-shoppers reached over 1.2 billion, with China in the lead, followed by the United States and Japan;
- growing mobile Internet: mobile Internet will be over 50% of Internet usage by 2015 at the latest;
- growing use of social networks;
- growing m-commerce, influenced by the further penetration of smartphones and tablets;
- impact of daily online deals around the globe (such as Groupon);
- increased secure and reliable payment and delivery options;
- a relatively young population ready to embrace new digital technologies and devices in emerging countries;
- customer profiling/hyper personalization becoming more and more important
- a greater role for video within e-commerce, for example to present fashion or to explain how something works.
- an more important role for omnichannel, as more and more online shops are opening an offline store.
- buying cross-border becoming more popular. In 2014, 309 million people bought something in an other country. It is expected that this number is going to increase to almost one billion in 2020.



Source: Wearesocial, 2015

Advantages and Barriers Regarding E-commerce

Overview and Forecast

Advantages and barriers

Naturally, e-commerce has its advantages in comparison with regular retail, but there are also a few barriers with regard to successfully conducting e-commerce. Below, we provide a number of advantages of online shopping as well as some barriers that may negatively influence e-commerce.

The advantages of e-commerce as experienced by consumers include:

- e-commerce enables consumers to easily search, compare and review products and stores;
- e-commerce offers consumers a wider competitive selection of goods and services as well as more choice;
- e-commerce enables the search for the best possible prices.

The main barriers perceived with regard to e-commerce are:

- lack of infrastructure;
- high costs or limitation of usage;
- lack of trust (perceived unsecure payment, privacy issues, return options, etc.);
- trade restrictions (tariffs, trade agreements, high import duties, etc.);
- different legal systems and requirements;
- language barriers;
- political instability, especially in emerging and developing regions of the world.



Source: Ecommerce Foundation, 2015

Overview Online B2C E-commerce Sales

Overview and Forecast

Countries	2011	2012	2013	2014	2015 (f)
China	\$95.0bn	\$184.0bn	\$328.5bn	\$538.1bn	\$654.3bn
United States	\$347.1bn	\$382.1bn	\$432.2bn	\$482.7bn	\$540.7bn
United Kingdom	\$111.7bn	\$127.8bn	\$142.3bn	\$169.0bn	\$191.2bn
Japan	\$98.4bn	\$110.3bn	\$118.6bn	\$135.5bn	\$156.8bn
Germany	\$54.6bn	\$66.4bn	\$84.2bn	\$94.6bn	\$106.3bn
France	\$50.1bn	\$59.8bn	\$67.9bn	\$75.5bn	\$82.9bn
Australia	\$13.9bn	\$16.0bn	\$18.4bn	\$21.0bn	\$23.8bn
Canada	\$18.2bn	\$20.9bn	\$24.2bn	\$27.8bn	\$31.3bn
Russia	\$10.3bn	\$13.7bn	\$20.6bn	\$23.9bn	\$30.6bn
South Korea	\$16.0bn	\$18.0bn	\$20.2bn	\$21.3bn	\$23.6bn
Spain	\$14.5bn	\$17.2bn	\$19.1bn	\$22.5bn	\$25.2bn
Brazil	\$9.1bn	\$15.8bn	\$18.6bn	\$21.0bn	\$23.5bn
Italy	\$10.7bn	\$12.7bn	\$15.0bn	\$17.6bn	\$20.3bn
India	\$8.2bn	\$12.1bn	\$16.0bn	\$19.4bn	\$23.7bn
Mexico	\$4.1bn	\$6.7bn	\$9.5bn	\$12.4bn	\$16.6bn
Indonesia	\$1.0bn	\$1.1bn	\$1.8bn	\$2.9bn	\$3.9bn
Argentina	\$2.6bn	\$3.5bn	\$3.7bn	\$4.5bn	\$5.2bn
Chile	\$1.0bn	\$1.3bn	\$1.6bn	\$2.0bn	\$2.4bn



OVERVIEW ONLINE B2C E-COMMERCE SALES 2011 - 2015

Based upon online sales
of goods and services in 2014

Source: Ecommerce Foundation, 2015

Overview Online B2C E-commerce Sales Growth

Overview and Forecast



Countries	2011	2012	2013	2014	2015 (f)
China	305.6%	93.7%	78.5%	63.8%	21.6%
Indonesia	38.9%	20.0%	52.8%	57.8%	35.5%
Mexico	45.2%	60.8%	41.4%	30.0%	34.0%
Chile	22.2%	26.8%	23.0%	25.0%	22.0%
Russia	29.2%	32.7%	50.5%	21.3%	22.3%
India	43.3%	46.9%	32.5%	20.8%	22.0%
Argentina	42.8%	35.4%	6.3%	20.2%	17.9%
United Kingdom	16.0%	14.4%	11.4%	18.7%	13.1%
Italy	19.2%	18.4%	18.2%	17.5%	15.2%
Spain	19.8%	18.8%	11.1%	17.2%	12.4%
South Africa	20.3%	25.9%	25.0%	16.6%	14.3%
Canada	12.2%	14.6%	15.6%	14.8%	12.6%
Japan	44.2%	12.0%	7.6%	14.2%	15.7%
Australia	15.8%	15.1%	15.0%	14.1%	13.3%
Brazil	28.7%	73.4%	17.3%	12.9%	12.0%
Germany	16.8%	21.7%	26.8%	12.3%	12.4%
USA	10.1%	10.1%	13.1%	11.7%	12.0%
France	21.6%	19.4%	13.6%	11.2%	9.9%

OVERVIEW ONLINE B2C E-COMMERCE SALES GROWTH 2011 - 2015

Based upon online sales growth
of goods and services, 2014

Source: Ecommerce Foundation, 2015

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Information about the Ecommerce Foundation and its Reports



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Ecommerce Foundation

About Ecommerce Foundation

Ecommerce Foundation

The Ecommerce Foundation is an independent **non-profit organization**, founded by Ecommerce Europe and working in partnership with national e-commerce associations worldwide. In addition, the Ecommerce Foundation cooperates with online and omnichannel selling companies from industries such as retail, travel & finance. Its mission is to facilitate the development of **practical knowledge**, insights and learnings **for** which individual **institutions, associations and B2C selling companies** do not have the (financial) resources and/or capabilities.

By combining collective goals and efforts, the Ecommerce Foundation is able to **realize research**, reports, benchmarks and studies that could **not** have been **possible** on an **individual basis**.



Ecommerce Foundation's Research Services

About Ecommerce Foundation



The **Ecommerce Benchmark** allows members to compare & improve their e-commerce activities.



The **EcommerceWiki** is *the* online e-commerce guide for students, online retailers (SME) and corporate digital experts.



E-commerce Reports curates all e-commerce-related research across the globe by adding an editorial board and peer review.



ShoppingTomorrow is a continuous program to help members look into the future of shopping.



Custom research is done for a diverse set of companies, both co-branded and white labeled.



10 yearly **National E-commerce Reports** supporting members who want to expand their business cross-border.

Information about the Reports

About Ecommerce Foundation

About the reports

This **B2C E-commerce Report** is published **annually** by the **Ecommerce Foundation** and provides overviews of the mature and emerging markets and of the major global statistics in the field of e-commerce.

In addition to this Global B2C E-commerce Report, the Ecommerce Foundation annually publishes 3 global regional reports, which cover **North America**, **Latin America** and **Asia-Pacific**. These include facts, figures, trends and forecasts on the different global regions. In addition to the global reports, the Ecommerce Foundation also publishes an overall European Report and 5 European regional reports, in cooperation with Ecommerce Europe.

Personalized report

It is also possible to have a tailor-made e-commerce report made, completely based on your wishes and requirements. This can be ordered through info@ecommercefoundation.org

Light reports

Ecommerce Europe also publishes light reports, which contain a summary of the full reports. These light reports can be downloaded for free through www.ecommercefoundation.org/reports

Order your reports through
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EUROPEAN REGIONAL REPORTS	PRICE
Western European Report Belgium, France, Ireland, Netherlands and United Kingdom	€790*
Central European Report Austria, Czech Republic, Germany, Hungary, Poland and Switzerland	€790*
Southern European Report Greece, Italy, Portugal, Spain and Turkey	€790*
Northern European Report Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway and Sweden	€790*
Eastern European Report Romania, Russia and Ukraine	€790*
European B2C E-commerce Report 2014	€1,290*
All European reports (5 regional reports + European Report)	€2,950*

* The European reports are free of charge for all company members and business partners, as well as for the members of our Nationals Associations.

REGIONAL/CONTINENTAL REPORTS	PRICE
North America USA, Mexico and Canada	€790
Latin America Brazil, Argentina and Chile	€790
Asia-Pacific Japan, China, India, Australia, Indonesia, Vietnam and South Korea	€790
MENA region The Middle East and North Africa	€790
BRIC Countries Brazil, Russia, India and China	€790
Global B2C E-commerce Report 2014	€1,290
All-In-One E-commerce Report Package (European and Global Report + 5 European Regional Reports + 5 Regional/Continental Reports)	€4,950

GOMSEC

GOMSEC aims to provide **guidelines for measuring and monitoring B2C e-commerce**. As a result, **all countries worldwide** are able to provide data with respect to the penetration of B2C e-commerce in a standardized way. All Ecommerce Europe figures and estimates are based on GOMSEC, unless stated otherwise. The data and research by GfK is also in accordance with GOMSEC.

The GOMSEC reports on sales figures for the total B2C e-commerce worldwide and for each country separate in the country profiles, **based on total sales of goods and services**.

Total sales of goods and services are based on the **areas/sectors/classification of areas and sectors, as stated on the next few pages**.

All data reported in **the national currency of the country involved** are converted into euros according to **the average (annual) rate of exchange** as provided by, preferably, **the European Central Bank (ECB)** or the **national bank** of the particular country. The reference period that is used for this was from **1 January 2014 to 31 December 2014**. Growth rates are calculated and measured by the B2C e-commerce sales in the national currency.

Definition of B2C e-commerce sales

“Any B2C contract regarding the sale of goods and/or services, fully or partly concluded by a technique for distance communication.”

Technique for distance communication: means that can be used for communication regarding the offer made by the trader and the conclusion of a contract, without the necessity of the consumer and trader being in the same place at the same time.

Contract: a contract whereby use is made, either solely or in part, of one or more techniques for distance communication within the framework of a system organized by the trader for the distance sale of goods and/or services, up to and including the moment that the contract is concluded;

Classification of B2C e-commerce

The following classification in Table 1 provides an overview of areas and sectors included in GOMSEC.

Online purchases of the following items are **excluded from GOMSEC**:

- Transactions between private individuals/ consumers (C2C), such as auctions and marketplaces, and between businesses (B2B)
- Online gambling and gaming
- Cars and other motor vehicles
- Houses and real estate
- Utilities (e.g. water, heating and electricity)
- Mortgages, loans, credit cards and overdrafts
- Savings accounts, funds, stocks&shares and bonds

B2C e-commerce therefore **includes** all online transactions between businesses and consumers using desktop computers, laptops, tablets, smartphones, point-of-sales and smart-wearables, for instance through online shops, physical stores (“online instore”), email, QR codes, catalogue, etc. B2C e-commerce includes Value Added Tax (VAT) or other sales tax, delivery costs and Apps, but excludes returns.

Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Foundation

Event Tickets
Tickets for concerts and festivals
Tickets for (movie) theaters
Tickets for zoos and amusement parks
Tickets for museums
Tickets for sports games

Fashion	
<i>Clothing</i>	<i>Shoes & Personal lifestyle</i>
Underwear & Upperwear	Shoes
Children's wear	Jewelry, Bijoux, Watches & others
Swimwear & Sportswear	fashion accessories (e.g. sunglasses)
Nightwear & legwear	Bags, wallets, suitcases

Sports & Recreation
Sports hardware (e.g. soccer shoes, tennis rackets)
Bicycles & accessories
Articles for camping and recreation

Toys
Indoor and outdoor toys

Food/Nearfood/Health	
<i>Food/Nearfood</i>	<i>Health & Beauty</i>
Food & Beverages	Personal care & Hygiene
Fresh produce	Baby care
Packaged consumer goods	Perfume
Detergents/household cleaning	OTC
Animal feed	
Tobacco	

Electronics		
<i>Consumer Electronics</i>	<i>Information Technology (IT)</i>	<i>Household Electronics</i>
Photo equipment	IT hardware (PCs, laptops, tablets, etc.)	MDA: air-conditioning, dishwashers, wash machines and other white goods
Audio equipment	Computer Software	
TV/video equipment	Music instruments	
Car electronics (navigation, audio, etc.)	USB sticks, DVD/CD-recordable, ink cartridges, computer accessories	SDA: equipment for personal care, home comfort, kitchen appliances

Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Foundation

Insurance		
New indemnity, Life and Health Insurances		
Liability insurance	ANW-gap insurance	Health Insurance –
Car insurance	(insurance for receiving a	Base
Fire and theft insurance	payment in addition to a	Health insurance –
	survivor's allowance)	additional
Bike/caravan/motorbike/	Annuity insurance	Disability insurance –
Scooter insurance	Pension	entrepreneurs
Accident insurance	Life insurance	Disability insurance –
Boat insurance	Funeral insurance	private
Legal assistance insurance	Endowment insurance	Mortgage-related
Home insurance	based on savings	disability insurance
Travel insurance	Endowment insurance	Mixed insurance
(continuous/annual + short	based on investments	(=endowment
term)		insurance + life
Insurance package		insurance)

Telecom
Smartphones, mobile phones & mobile devices
Telefax and answering machines
Headsets & Accessories (mobile) phones
Prepaid cards and tariffs of new phone subscriptions

Travel	
Package Travel	Flight Tickets & Accommodations
Package travel	Flight Tickets
Private transport if booked through a tour operator	Hotel stays
	Apartment/bungalow/camping site
	-> all of the above not booked in combination with other travel-parts

Media & Entertainment
Music (physical, download & streaming)/Spotify based on new subscriptions
Video (DVD, Blu-ray, downloads)
Games hardware & games software
Books & e-books
Apps
New subscriptions newspapers and magazines (no single copy sales)

Others	
Services	Goods
Dating based on new subscriptions	Cars and parts
Other Services	Products for animals
	Flowers & plants
	Optician (excl. sunglasses, hearing aids)
	Adult

Definitions related to the Internet, E-commerce and Online Retailing

About Ecommerce Foundation

- **Broadband access:** the availability of broadband is measured by the percentage of households that are connectable to an exchange that has been converted to support DSL technology, to a cable network upgraded for Internet traffic, or to other broadband technologies. It includes fixed and mobile connections (source: Eurostat)
- **Cross-border e-commerce:** percentage of e-commerce purchased at foreign sites
- **E-commerce (or electronic commerce), a subset of e-business:** any B2C contract on the sale of products or services fully or partly concluded by a technique for distance communication.
- **E-commerce GDP:** total amount of goods and services online divided by the total Gross Domestic Product (GDP).
- **E-households:** number of households that use the Internet for personal gain.
- **E-household expenditure:** expenditure per household that bought goods or services in the past year.
- **Global Online Measurement Standard for B2C E-commerce (GOMSEC):** aims to provide guidelines to measure and monitor B2C e-commerce in order to enable all European countries to provide data with respect to the penetration of B2C e-commerce in a standardized way.

- **Gross Merchandise Volume:** the total sales facilitated by a third party, such as a market place.
- **E-services or electronic services:** “Deeds, efforts or performances whose delivery is mediated by information technology. Such e-service includes the service element of e-retailing, customer support, and service delivery.” This definition reflects three main components: service providers, service receivers and the channels of service delivery (i.e. technology). (Jennifer Rowley, Professor Information and Communications, Manchester Metropolitan University, UK)
- **Inactive online population:** users that have access to the Internet but have not (yet) purchased goods or services online in the past year.
- **Market place:** online platform on which companies (and consumers) sell goods and/or services
- **Mobile commerce (or m-commerce):** the ability to conduct commerce using a mobile device e.g. a mobile phone, a PDA, a smartphone, a tablet or other (emerging) mobile equipment.
- **Mobile subscriptions:** mobile cellular telephone subscriptions are subscriptions to a public mobile telephone service using cellular technology, which provide access to the public switched telephone network. Post-paid and prepaid subscriptions are included (source: Eurostat)

Definitions related to the Internet, E-commerce and Online Retailing

About Ecommerce Foundation

- **Online buyer (or e-shopper, E-buyer):** an individual who regularly bought or ordered goods or services through the Internet.
- **Online expenditure:** spending per user who purchased goods or services online.
- **Online Retail (or e-retail, electronic retail or retailing or even e-tailing):** the selling of retail goods and services on the Internet. In the limited sense of the word, sectors such as online leisure travel, event tickets, downloading music or software are not included. Online-only retail shops are often referred to as pure players.
- **Penetration levels:** the percentage of a population using the Internet, mobile phones, smartphones or tablet devices.
- **Real growth rate:**
- **Retail sales:** the selling of mainly goods from businesses to individuals from a traditional or so-called bricks-and-mortar shop.

Methodology , Acknowledgements and Sources

About Ecommerce Foundation

This report could only be realized by consulting a great many sources, available in various countries and regions in Europe and around the globe. The wide variety of sources include public domain publications, blogs, websites, industry and financial specialist publications, regional and local news, annual reports, and press releases.

Sometimes the information sources are contradictory and sometimes different figures and data were given by varying sources within the same country, for example due to different definitions. In our reports and country profiles we have mentioned the different sources, definitions and outcomes of such reports, studies and interpretations.

This report is meant solely for use by the recipient and is not for circulation. It is based on information that we consider reliable, but we cannot vouch for it being accurate or complete, nor should it be relied upon as such. Opinions expressed are our current opinions as of the date of this report.

The sources consulted include:

(Inter)national Associations

- Ecommerce Europe
- Distansehandel Norge (Norway)
- FDIH (Denmark)
- KAUPPA (Finland)
- SDH (Sweden)
- Adigital (Spain)
- BeCommerce (Belgium)
- Händlerbund (Germany)
- ETID (Turkey)
- FEVAD (France)
- National Retail Federation (USA)
- Netcomm (Italy)
- Retail Excellence (Ireland)
- Shop.org (USA)
- Sdh (Sweden)
- Apec (Czech Republic)
- Thuiswinkel.org (Netherlands)
- Netcomm Suisse (Switzerland)
- Versandhandel (Austria)

Corporate sources

- A.T. Kearney
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- Forrester
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- Hybris
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- TWS Global

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- Euromonitor.com

Other sources

- Digital Hub Development Agency (DHDA)
- European Commission
- Eurostat
- European Central Bank (ECB)
- European Banking Association (EBA Clearing)
- International Monetary Fund (IMF)
- International Telecommunications Union (ITU)
- Internetworldstats
- National Statistics offices
- The Heritage Foundation
- United Nations (UN)
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- World Economic Forum
- Wearesocial.net
- Netwise.jp
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- Ystats.com
- Ekathimerini.com
- Ecommercenews.eu
- About-payments.com
- The Modern Spice Routes (PayPal)
- Statista

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About Ecommerce Foundation



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