

E-Commerce in Turkey
2017 Market Size
May 2018

Project stakeholders

**Project
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Deloitte.

Project Partner

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**Project Data
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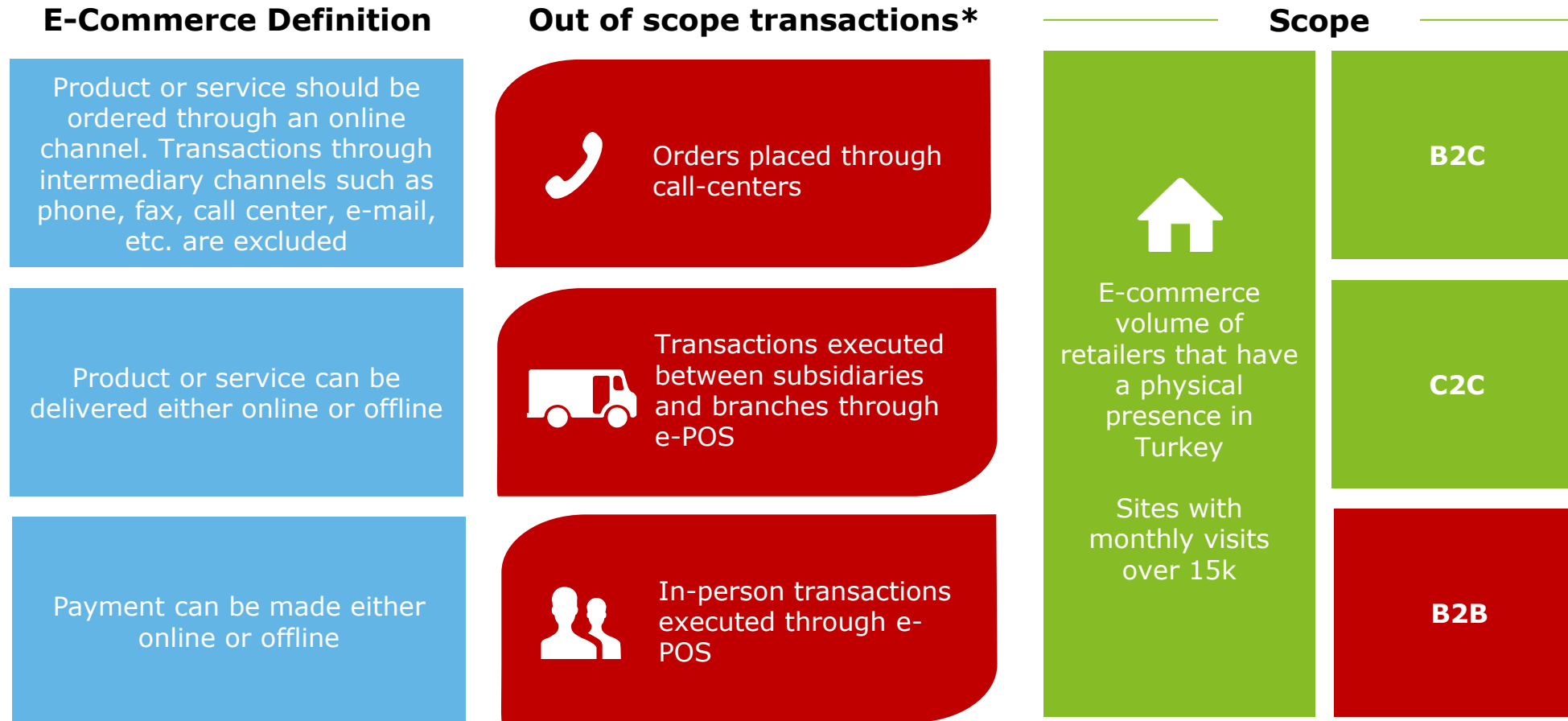
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E-commerce definition and estimation model

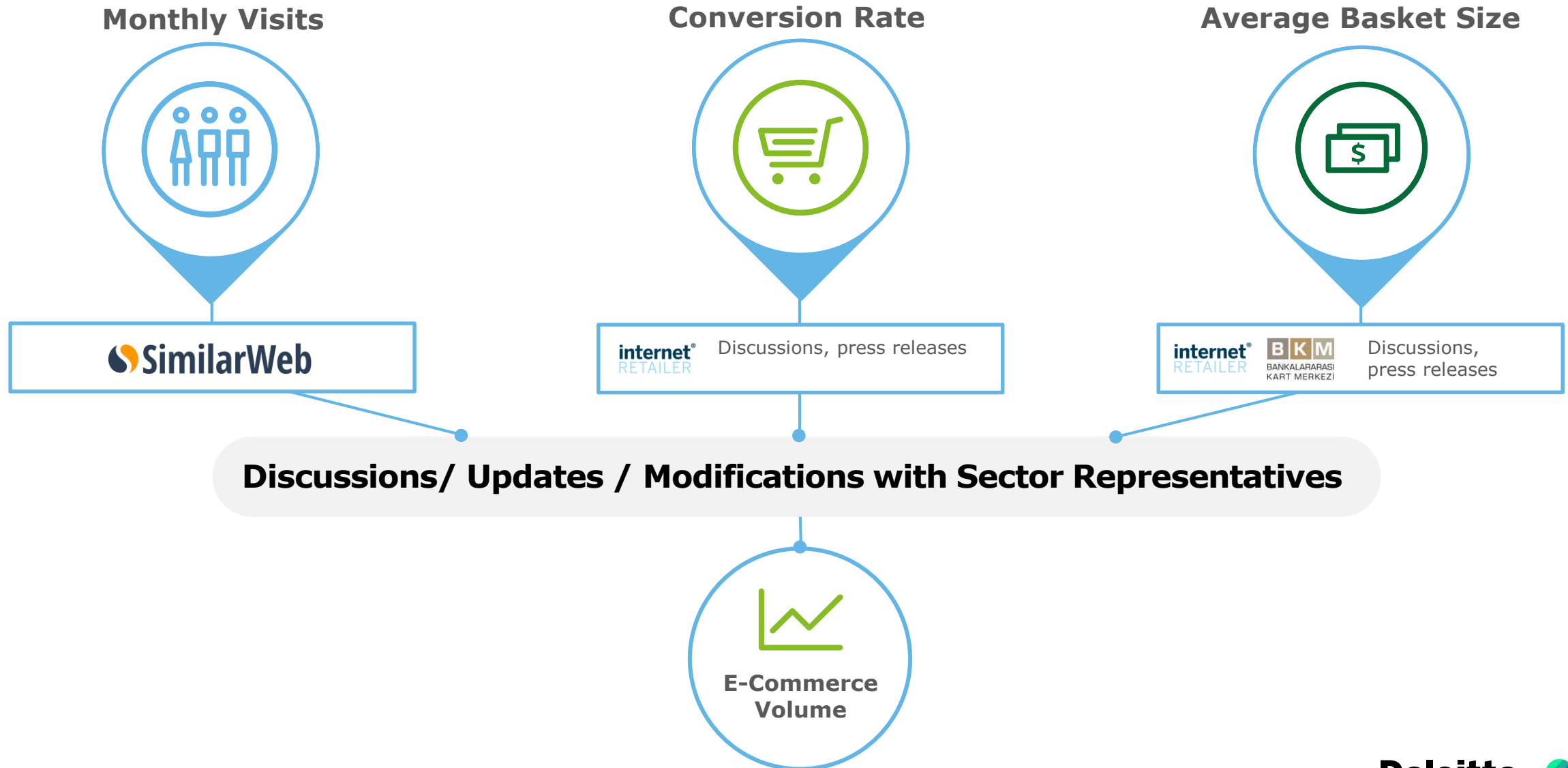


E-Commerce definition and scope



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

Estimation model

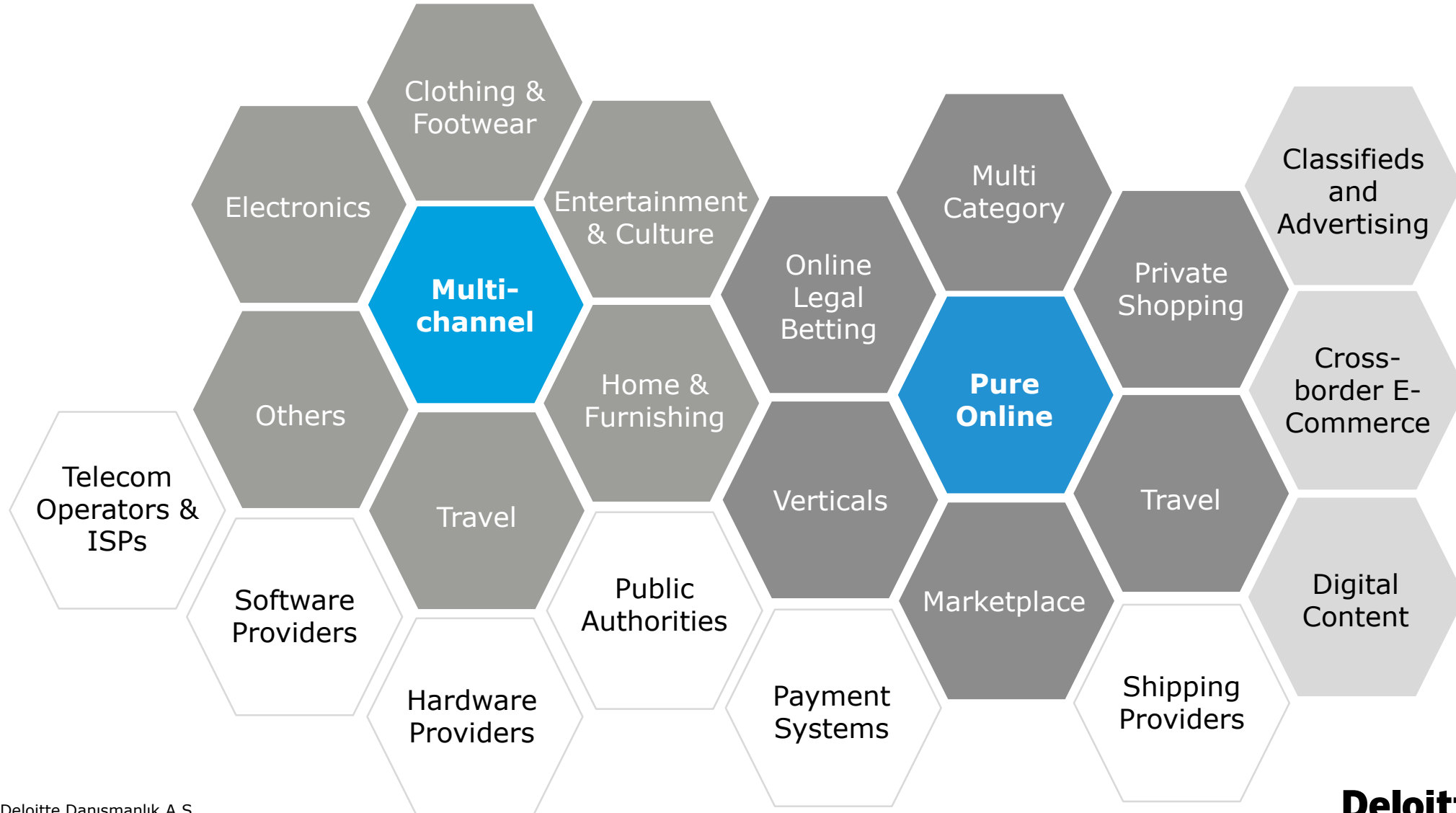




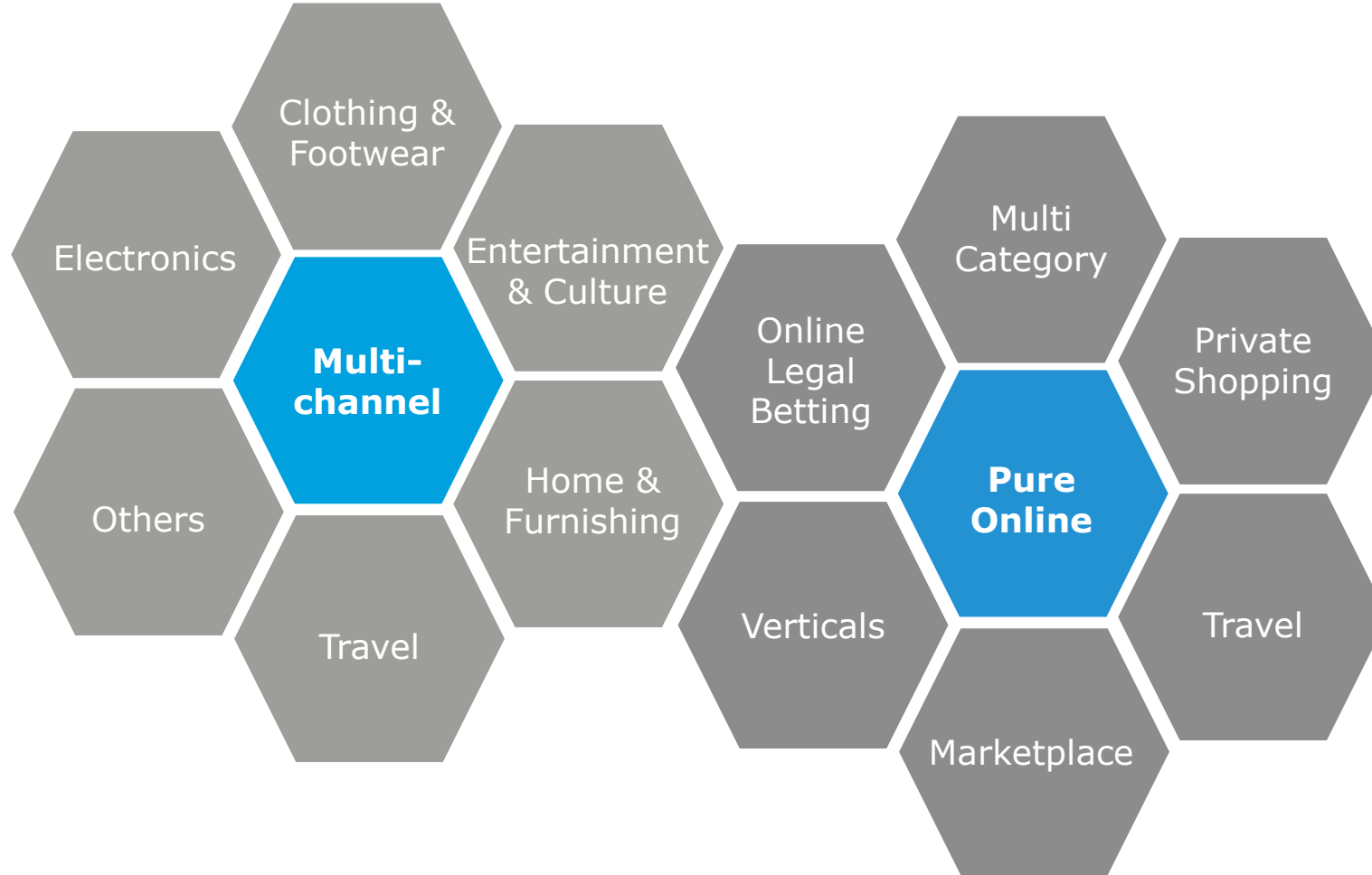
E-Commerce ecosystem and scope



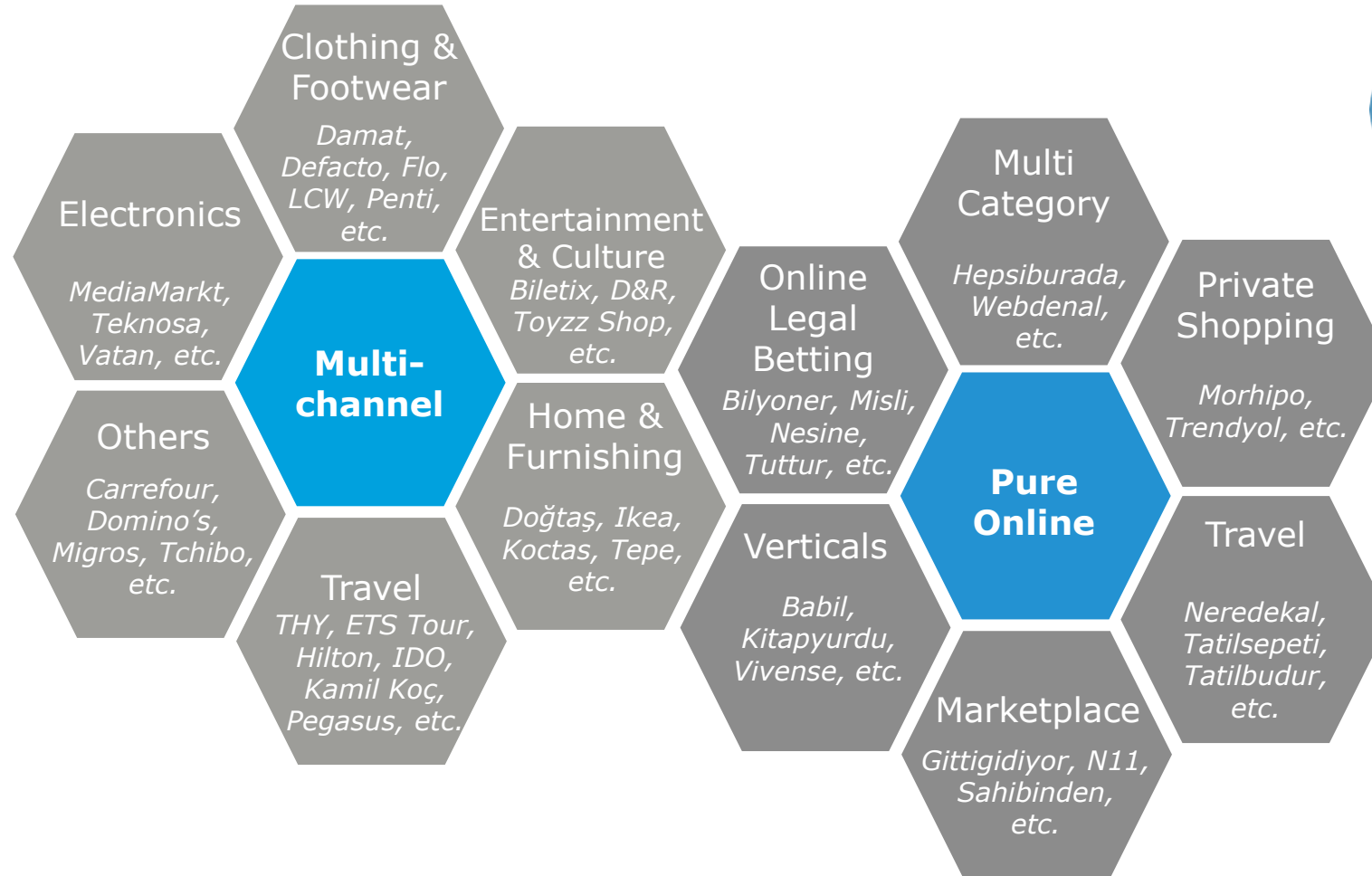
E-Commerce ecosystem



Scope of estimation model



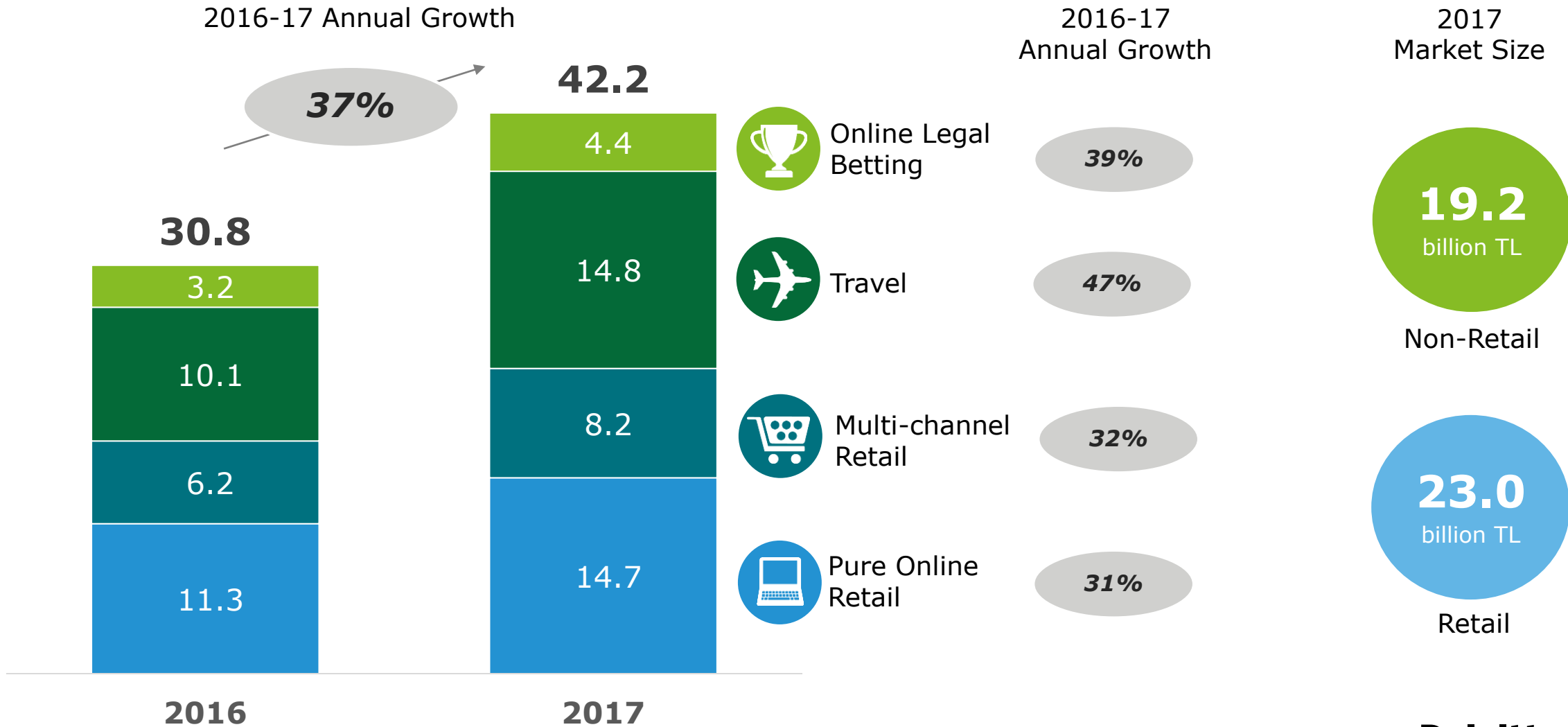
Scope of estimation model





E-Commerce market size

E-Commerce market size in Turkey (billion TRY)







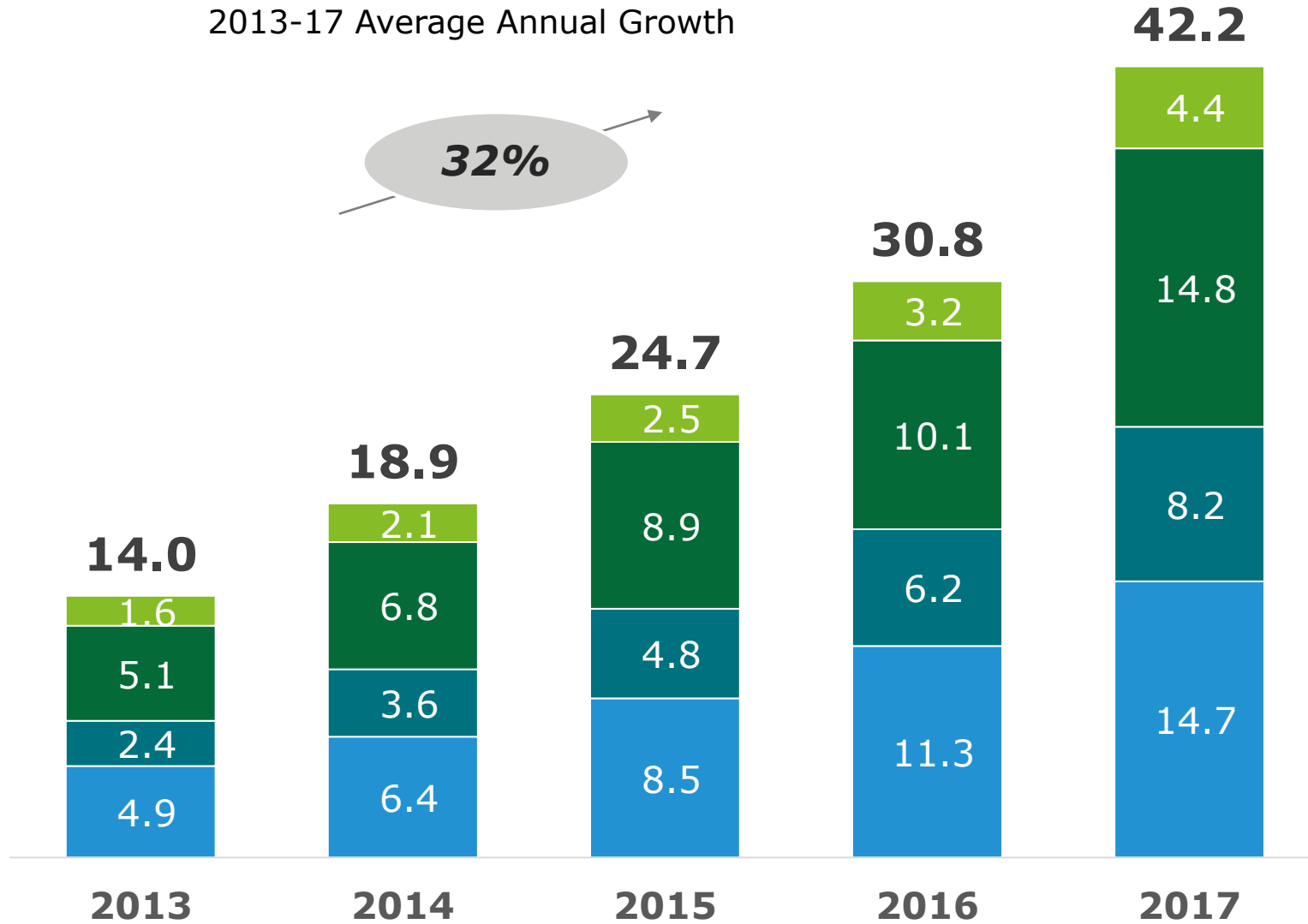
E-Commerce market size in Turkey (billion USD)

2013-17 Average Annual Growth

32%

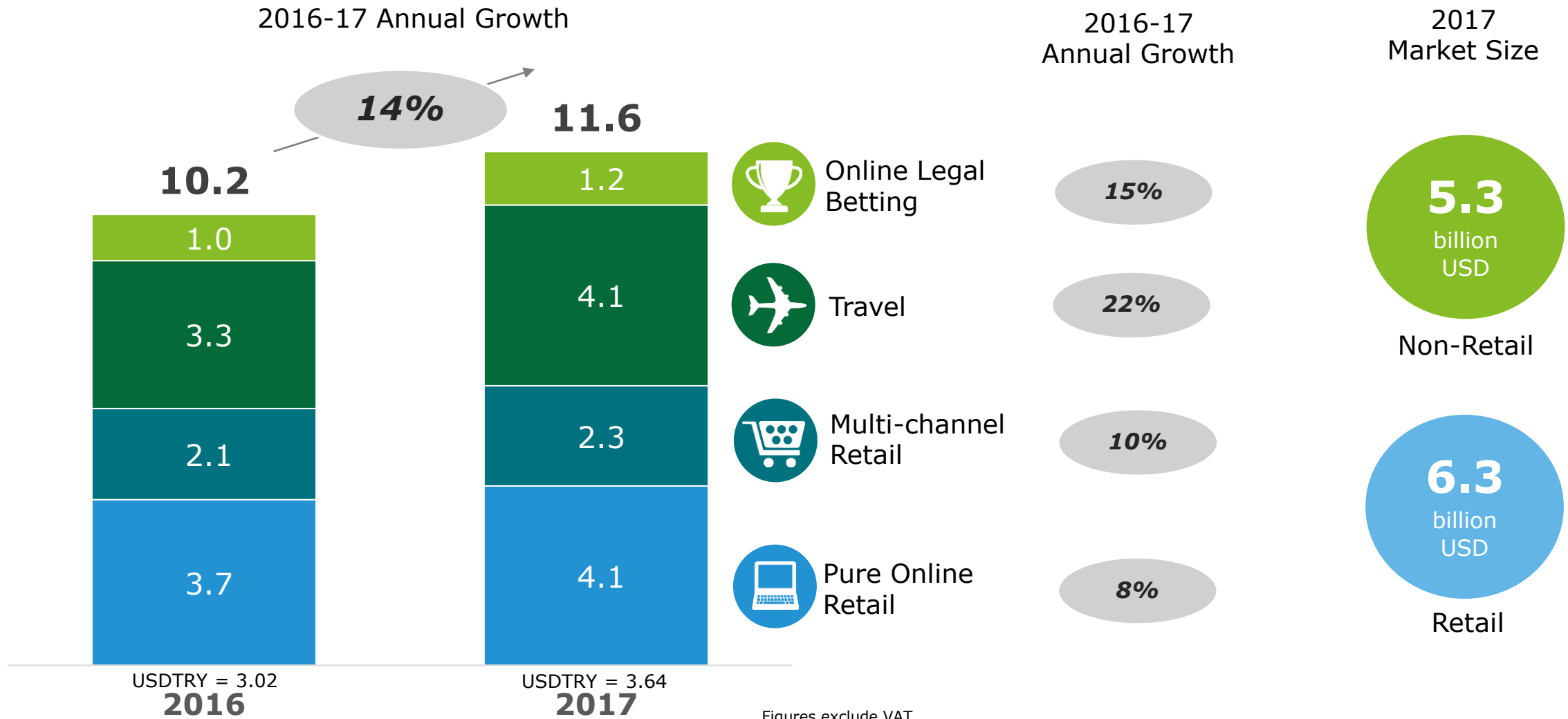
2013-17 Average Annual Growth

-  Online Legal Betting **29%**
-  Travel **31%**
-  Multi-channel Retail **36%**
-  Pure Online Retail **32%**



Figures exclude VAT

E-Commerce market size in Turkey (billion USD)

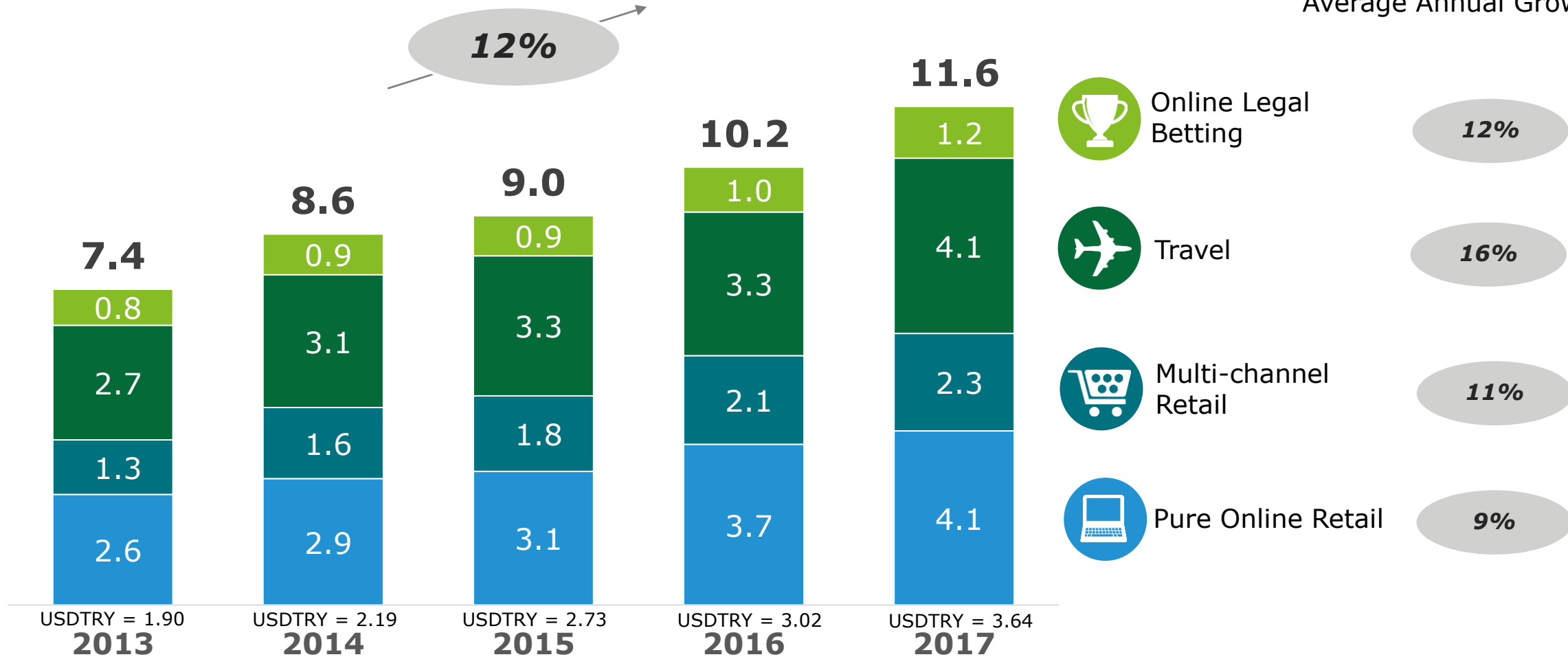


E-Commerce market size in Turkey (billion USD)

2013-17 Average Annual Growth

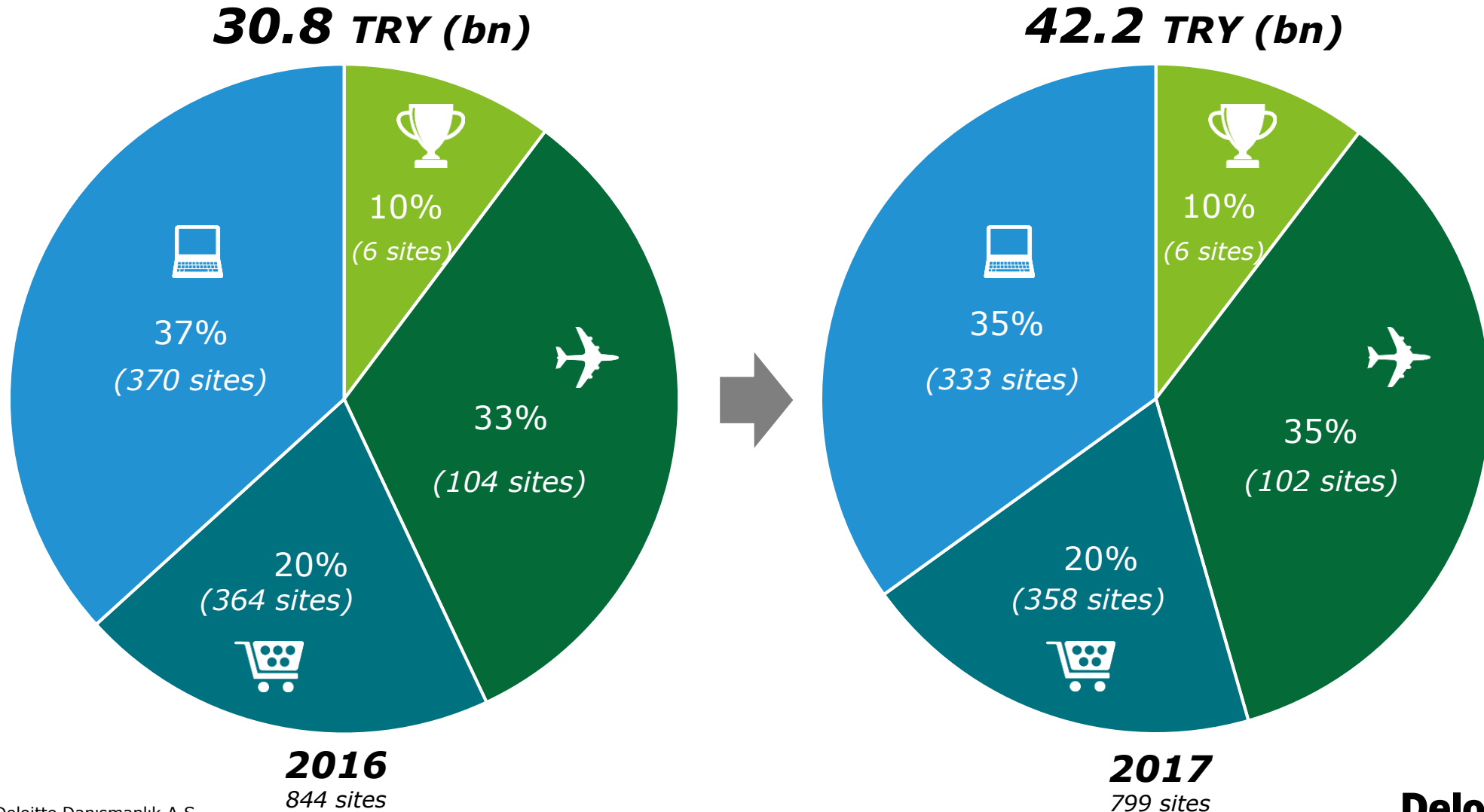
12%

2013-17 Average Annual Growth



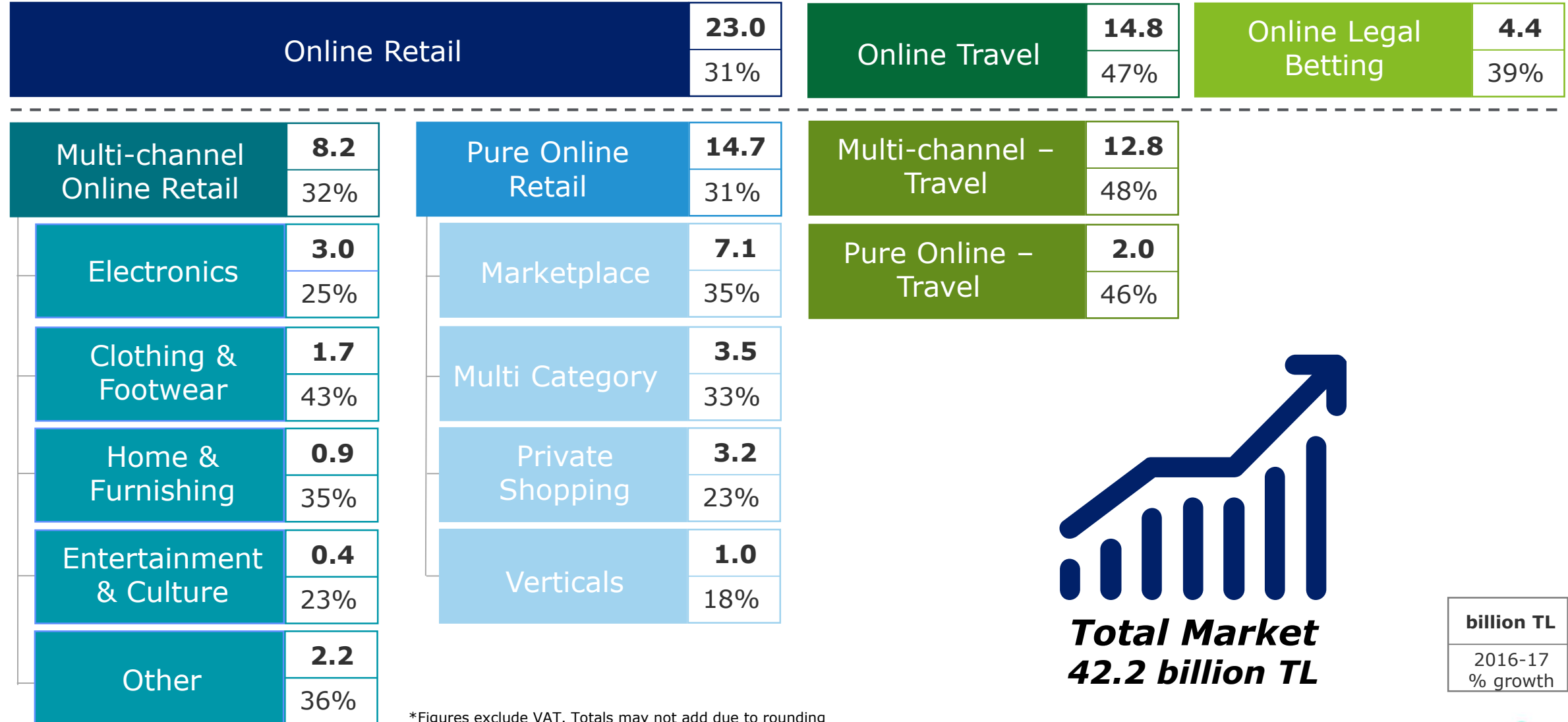
E-Commerce market size in Turkey

Category mix and number of sites



E-Commerce market size in Turkey by category

billion TRY



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

Global comparisons (2017)

Country	Online Retail / Total Retail	Internet Penetration	Mobile Broadband Penetration	Online Shoppers	Mobile Shoppers	Income per capita \$ K	Population (mn)
UK	15.7%	38.6%	89.0%	78%	40%	\$44.1K	66.0 mn
USA	11.8	33.6	128.6	67	36	59.5	325.7
Germany	9.1	39.4	78.6	74	23	50.4	82.9
France	8.3	42.0	81.2	61	17	43.8	64.6
Japan	7.9	30.8	157.4	63	24	42.8	126.7
Spain	4.0	30.5	92.7	59	26	38.3	46.5
Average %9,8*							
China	20.4	23.0	60.2	45	39	16.7	1,390.1
Poland	6.2	18.3	87.2	57	22	29.5	38.4
India	4.9	1.4	14.8	26	20	7.2	1,321.0
Brazil	6.3	12.9	94.0	45	27	15.6	209.3
Russia	4.8	19.1	82.0	46	23	27.8	144.5
Average %4,8**							
Turkey 2016	3.5	13.0	64.8	43	31	24.9	79.8
Turkey 2017	4.1	14.7	69.9	43	30	26.9	80.8

Online retail/total retail ratio is calculated by dividing retail e-commerce size used in this study over total retail sector size in Turkey estimated that Euromonitor. Turkey data for broadband penetration is taken from BTK and it is calculated by the ratio of the number of subscribers to the population. Per Capita Income is calculated according to Purchasing Power Parity. Online shoppers include those who reported that they shopped online (desktop vs mobile) one month ago. Country groups are organized according to World Economic Situation and Prospects, 2017 classification. *The developed country average is calculated using data from 32 countries that are predominantly European countries. **Developing countries are composed of 46 countries except China.

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

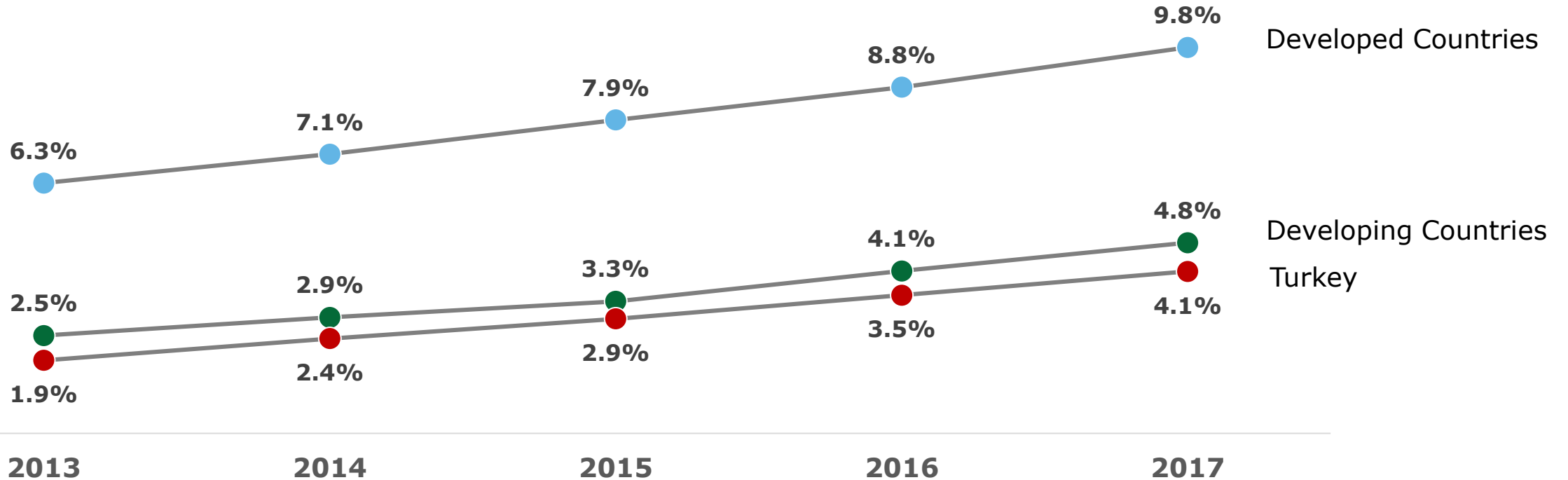
Global comparisons (2017)



○ = Population

Global comparisons (2013-2017)

% of Online Retail in Total Retail (2013-2017)



Online retail/total retail ratio is calculated by dividing retail e-commerce size used in this study over total retail sector size in Turkey estimated that Euromonitor. Country groups are organized according to World Economic Situation and Prospects, 2017 classification. The developed country average is calculated using data from 32 countries that are predominantly European countries. Developing countries are composed of 46 countries except China. Source: Worldbank, Euromonitor, and Deloitte analysis.



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Thank You

We would like to thank
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valuable contributions.