



PREVIEW

Global Retail eCommerce Market

*Retail eCommerce Overview &
Directory of Country Profiles*

The information is based upon information we consider reliable, but its accuracy and completeness cannot be guaranteed.



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Report Overview

WHAT IS THIS REPORT?

This 44-page report is a guide to understanding trends in the global eCommerce market.

The first section is a briefing on the global eCommerce industry, including current eCommerce trends and projected eCommerce trends by region, a look at digital buyer penetration, retail eCommerce sales as a percentage of overall retail sales and online browsing and buying intention for regions around the globe.

The latter half of the report provides a unique glimpse into 20 geographies across the planet and provides details on each country's retail eCommerce statistics, major payment players for that particular geography as well as insights into the country's payment and technology infrastructure. Highlights include top issuers, top acquirers/processors, internet, smartphone and digital buyer penetration, retail eCommerce sales and eCommerce sales by payment type for each respected geography.

WHY IS THIS USEFUL?

This report will provide newcomers, and industry veterans, with useful information into the various facets of the global eCommerce market. This report is an excellent tool for competitive awareness, potential partner identification, expansion efforts and general reference purposes.

Report Overview

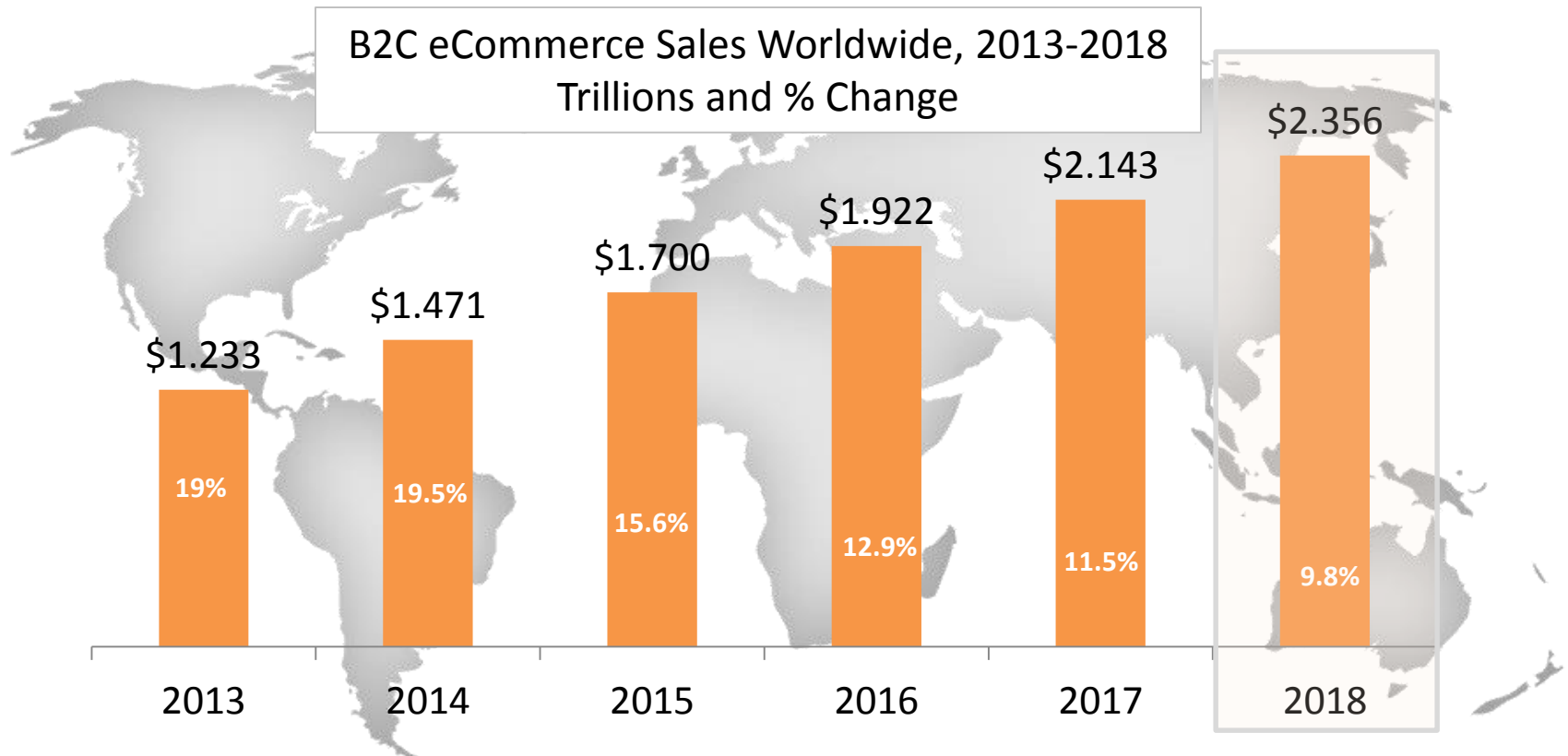
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The Global eCommerce Market – Sample Page

- Business-to-consumer (B2C) eCommerce sales worldwide will reach \$1.471 trillion in 2014, increasing nearly 20% over 2013.
- As internet usage continues to mature across the world, eCommerce growth will slow over time, settling around 10% by the end of 2018. However, with sales reaching \$2.356 trillion in 2018, a 10% growth rate still represents more than \$200 billion new dollars that year.



B2C eCommerce sales includes all products and services ordered or booked via the internet on any device, including leisure and unmanaged business travel.

Source: eMarketer 2014, Euromonitor, World Bank, World Economic Forum, Bank for International Settlements

China – Sample Page



Payments Market Summary

- Internet retailing is booming in China, backed by the mounting internet surfers and the rising ownership of computers and smartphones. Increasing online and mobile payments have further reduced transactions and retail value of ATMs. On the other hand, debit and credit card transactions continue to be buoyant and record double-digit current value growth, though decelerating in 2013 over 2012 given the unfavorable macroeconomic climate.
- A little over a decade ago, China's path to eCommerce leadership would have been difficult to foresee, even as the tech boom in the US and other markets saw the development of eCommerce as an important B2C and C2C channel. In 2000, China had yet to develop any eCommerce applications, and had only 2.1 million total internet users. Essentially, China's large and growing middle-class have become accustomed to making frequent eCommerce purchases.

At a glance

2014 Population
1.35 billion

2014 GDP
\$16.1 trillion

Top Card Brands

- **China UnionPay = 54.1%**
- **Visa = 25%**
- **MasterCard = 17.7%**
- **Other = 3.2%**

Top Issuers

- **Agricultural Bank**
- **ICBC**
- **China Construction Bank**
- **Bank of China**
- **China Merchants Bank**
- **Bank of Communications**
- **China Everbright Bank**

Top Acquirers/Processors

- **UMS: UnionPay Merchant Services** is the largest merchant service operator in China. It is the commercial service arm for China UnionPay.

Internet Penetration
46.03%

Smartphone Penetration
40%

Digital Buyer Penetration (internet users who have made at least one purchase via any digital channel during the year)
55.2%

Popular Online Payment Methods

Alipay: Buyers and sellers on Alibaba Group websites use Alipay to make and receive payments online.

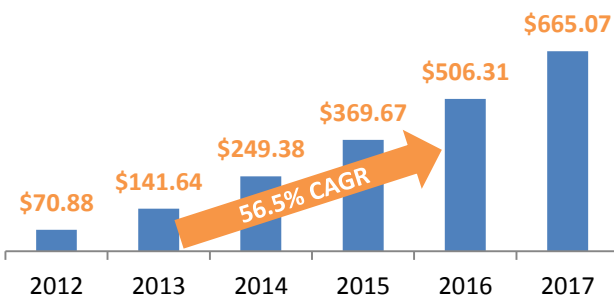
PayPal

Tenpay: Tencent's Tenpay is Alipay's main competitor in the payments industry. Tenpay can be used to send/receive payments, withdraw money from bank accounts, charge mobiles, deposit money in game accounts and buy air tickets.

UPOP: UnionPay Online Payments (UPOP).

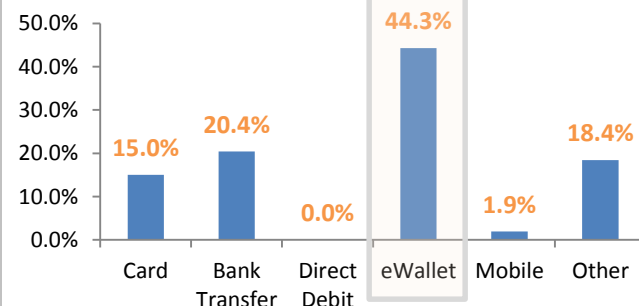
Nearly half of all transactions in China – 44.3% - are made using eWallets, with Alipay the most popular provider, accounting for 30% of transactions. Tenpay accounts for 13.3% of transactions, while international providers such as PayPal have a much smaller presence, with less than 1% of the market. Cards account for just 15% of the market in China, with local provider UnionPay dominating the market at 14%. Cash on delivery remains a common payment type for business to consumer merchants, accounting for 10.9% of the market, although that is slowing.

Retail eCommerce Sales (in billions)



Includes products/services ordered over the internet via any device; excludes travel and event tickets

eCommerce Mix by Payment Type



Source: Global Guide To Alternative Payments, 2013; eMarketer; Euromonitor; The Paypers; CIA

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Have Questions?

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About TSG

The Strawhecker Group (TSG) is a management consulting company focused on the electronic payments industry.

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Payments Strategy - Payments Strategy encompasses the full spectrum of advisory services within the Payments Industry. The depth of these services is built on deep industry knowledge - the Partners and Associates of the firm have an average of over 20 years of industry experience. With clients from card issuers to merchant acquirers, TSG has the experience and expertise to provide real-time strategies.

Transaction Advisory - Whether buying or selling, seeking investment funding, or planning your company's exit strategy, TSG's experience can be critical to achieving success. TSG has performed more than 100 Payments Company Valuation and/or Business Assessments in the past three years - ranging in value from \$1 million to \$1 billion.

TSG Metrics - TSG Metrics, the strategic research and analysis division of TSG, provides the Payments Industry with highly focused research and industry-wide studies. TSG Metrics takes data, boils it down to information, transforms it to knowledge and presents it to provide wisdom to its client partners.

TSG's Unparalleled Experience

TSG consists of Industry leaders with extensive experience leading teams through explosive growth periods, mergers and acquisitions, and international and domestic expansion within the Payments Industry. Both Partners and Associates of the firm have held key senior management positions at leading industry companies including First Data / First Data International, Visa Inc., MasterCard, TSYS, Humboldt Merchant Services, WorldPay, Heartland Payment Systems, Cardservice International, iPayment, Alliance Data, RapidAdvance, Accenture Consulting, Redwood Merchant Services, Chase Paymentech, as well as other leading financial institutions and Payments companies.

TSG's Influence Shapes the Payments Industry

Over the last three years, TSG has completed over 400 projects for more than 200 different clients including financial institutions, merchant acquirers, card issuers, card associations, technology providers, ISOs, processing companies and the investment community. Additionally, the firm and its Associates sit on several industry committees whose focuses range from emerging product development to governmental regulation advisement.

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