

INDONESIA B2C E-COMMERCE MARKET 2015

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- Founded in 2005 and headquartered in Hamburg, Germany, yStats.com is one of the world's leading secondary market research companies.
- We are committed to providing the most up-to-date and objective data on Global B2C E-Commerce and Online Payment markets to sector-leading companies worldwide.
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INDONESIA B2C E-COMMERCE MARKET 2015

GENERAL INFORMATION

PRODUCT DETAILS

Title:	Indonesia B2C E-Commerce Market 2015
Type of Product:	Market Report
Category:	B2C E-Commerce
Covered Regions:	N/A
Covered Countries:	Indonesia
Language:	English
Formats:	PDF & PowerPoint
Number of Charts:	65

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QUESTIONS ANSWERED IN THIS REPORT

How large is the B2C E-Commerce Market in Indonesia and what are its prospects?
How does Indonesia compare to other countries in Southeast Asia and in Asia-Pacific by criteria related to B2C E-Commerce?
What trends can be observed in the online retail market in Indonesia?
Who are the largest competitors in this market?

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INDONESIA B2C E-COMMERCE MARKET 2015

KEY FINDINGS



INDONESIA TO BECOME THE LARGEST B2C E-COMMERCE MARKET IN SOUTHEAST ASIA

The fourth most populous country worldwide, Indonesia, ranks in the top 10 global markets by number of Internet users, despite low Internet penetration. Although only a low double-digit share of Internet users in the country makes purchases online, Indonesia is reported to have the potential to become by far the largest of the B2C E-Commerce markets in Southeast Asia, due to anticipated rapid growth.

Indonesia is a “mobile first” country. Mobile phones were used by the majority of Internet users in Indonesia to access the web in 2014, and were furthermore the device most used by online shoppers to make purchases online. Smartphone penetration is growing, expected to top 100 million users and rank Indonesia among the top 5 countries worldwide by number of smartphone users, within the next three years. Additionally, clothing and other fashion-related items were the most purchased online product category last year, while the payment method most preferred by online shoppers was bank transfer.

As the E-Commerce landscape evolves in Indonesia, the competition is dominated by marketplaces. The most popular E-Commerce website in Indonesia, Lazada, combined online retailing with the marketplace model and achieved triple-digit growth across Southeast Asia last year. It also attracted additional investment, as did two other marketplaces, Tokopedia and Elevenia. Meanwhile, the two major online classifieds websites in the country, OLX and Berniaga, formed a joint venture under the OLX brand to compete together in the increasingly competitive and booming E-Commerce industry.

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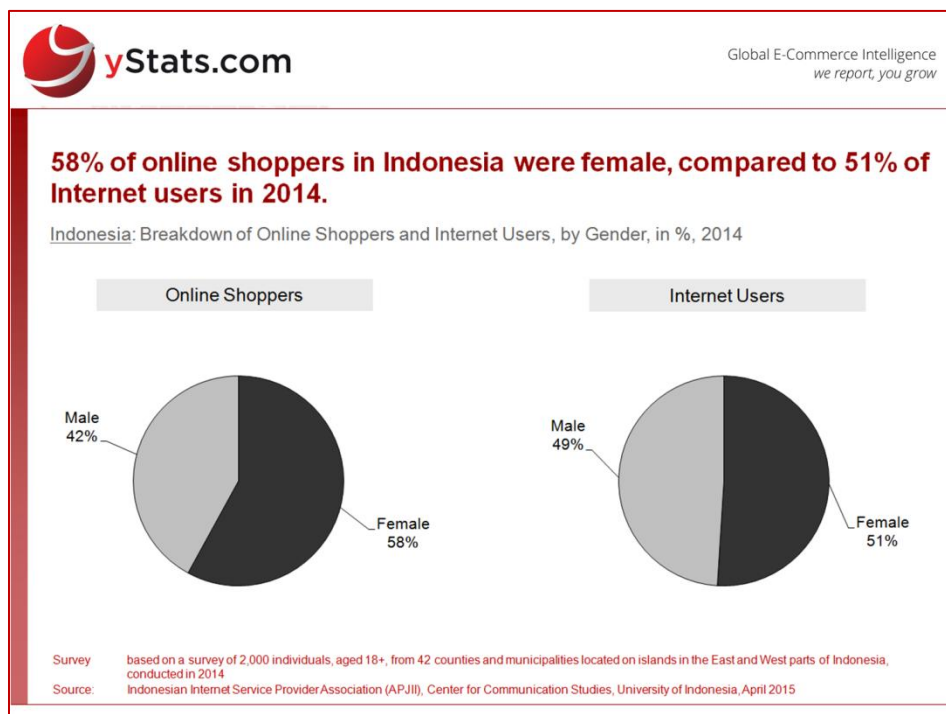
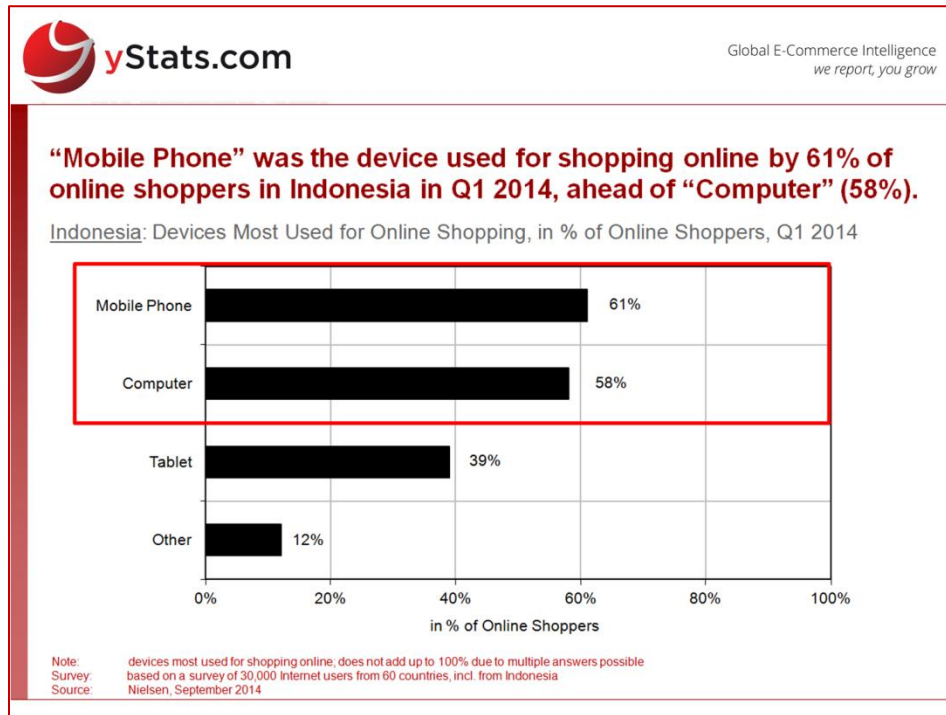
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INDONESIA B2C E-COMMERCE MARKET 2015

REPORT-SPECIFIC SAMPLE CHARTS



INDONESIA B2C E-COMMERCE MARKET 2015

METHODOLOGY

GENERAL METHODOLOGY OF OUR MARKET REPORTS

- Our reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.
- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Sub Title, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.
- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.
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- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

METHODOLOGY OF OUR INDONESIA B2C E-COMMERCE MARKET 2015 REPORT

- In this country report, major trends in the B2C E-Commerce market, sales figures, B2C E-Commerce share of the total retail market, main online product categories, and relevant information about Internet users, online shoppers and leading E-Commerce companies was included.
- The report starts with an overview of the B2C E-Commerce market and international comparisons, where the relevant country is compared to other countries worldwide and in the region in terms of criteria relevant to B2C E-Commerce.
- The "Trends" section includes an overview of trends on the B2C E-Commerce market, such as social commerce, cross-border, M-Commerce and regulatory trends.
- The section "Sales & Shares" includes the development of B2C and total E-Commerce sales, including historical sales and forecasts. Furthermore, this section shows the development of B2C E-Commerce share of the total retail market.
- In the "Users & Shoppers" section, a review of the development of Internet users and Internet penetration was included. Moreover, the evolution of the online shopper penetration was shown.
- Afterwards, the section "Products" shows the leading product categories among online shoppers.
- The next two sections, "Payment" and "Delivery", cover information related to delivery and payment methods most used by online shoppers.
- Finally, the "Players" section includes information about the leading E-Commerce players, such as online retailers and marketplaces.

INDONESIA B2C E-COMMERCE MARKET 2015

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PUBLISHED RELATED REPORTS

REPORT	PUBLICATION DATE	PRICE *
Asia-Pacific Cross-Border B2C E-Commerce 2015	August 2015	€ 950
Asia-Pacific Online Payment Methods: First Half 2015	August 2015	€ 750
Top 8 Global B2C E-Commerce Country Sales Forecasts: 2015 to 2018	July 2015	€ 2,950
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Global B2C E-Commerce and Online Payment Market 2014	October 2014	€ 5,950**

UPCOMING RELATED REPORTS

REPORT	PUBLICATION DATE	PRICE*
South East Asia B2C E-Commerce Market 2015	September 2015	€ 1,950
Asia-Pacific B2C E-Commerce Market 2015	September 2015	€ 2,950

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2.3 To purchase a Market Report offline (not via the online shop) simply print the Report Order Form from the appropriate online brochure or by clicking on the Fax Order button on our webpage. Simply fill out the Report Order Form, have a duly authorized representative sign the Report Order Form and then submit the Report Order Form to us via facsimile or email with PDF-attachment. Upon receipt of a completed Report Order Form, you will obtain an invoice detailing the product ordered, price, and date of payment. Upon successful processing of payment, access and log-in details will be forwarded to the purchaser within two (2) business days.

2.4 If you order our product "Market Reports", you gain access to the ordered report as identified in the Report Order Form and you may use that report in accordance with Section 5.3 below and the other provisions of the Contract.

2.5 To purchase one of our Full Access Subscriptions, please contact us through the appropriate forum on our website, located under the Full Access tab on our homepage. Once we receive an inquiry, we will forward an Order Form to be filled out and signed by a duly authorized representative. Once this Order Form has been completed and signed, please send the Order Form via facsimile or email with PDF-attachment. Upon receipt of the completed Order Form, we will send an invoice detailing price of the "Full Access Subscription" and payment method options. Upon successful processing of payment, access and log-in details will be forwarded to the purchaser within two (2) business days. The provision of this information constitutes the acceptance should you not have been provided with a separate acceptance in writing.

2.6 If you order one of our "Full Access Subscriptions", you gain access to any E-Commerce reports within the scope of your chosen subscription (excluding all custom research services) currently available on our website during the subscription timeframe as identified in the "Order Form" as of the date of the execution of the Contract, and you may use those reports as a "Global Site License" in accordance with Section 5.3 below and the other provisions of the Contract.

3. CUSTOM RESEARCH OFFERS & ORDERS

3.1 Unless expressly agreed upon otherwise in writing, the contents of our offers may not be made available in whole or in part to any third party outside your organization.

3.2 With respect to research services, upon inquiry, we submit an offer to you in the form of a "Research Order Form" as a PDF, accompanied with a proposal stating the nature of the issue to be researched, the services to be rendered, the time required for the study, structure of payments (if any) and the total fee due. You accept this offer by completing the Research Order Form, having a duly authorized representative sign the Research Order Form and then submitting the Research Order Form to us via facsimile or email with PDF-attachment.

4. TERMS OF PAYMENT

4.1 All prices for offline orders are to be derived exclusively from the Order Form and/or the documents referred therein. All prices for orders placed via the online shop are those which are displayed on our website.

4.2 All prices are net and without transportation costs, if applicable. Value Added Tax, if applicable, at the statutory rate shall be added to all fees payable hereunder.

4.3 For all services that go beyond the scope as agreed under the Order Form, a reasonable additional fee for these services shall be discussed and agreed upon with the customer before commencement of any work and will be itemized on the final Invoice (if applicable) sent to the customer.

4.4 We will send our Invoice to you upon execution of the Contract, unless agreed otherwise in the Order Form. In the event that you order our product "Full Access Subscription", we will send our invoice for the first contract year upon execution of the Contract. Any Invoice(s) for any subsequent contract year(s), will be sent to you upon commencement of each contract year.

4.5 All payments shall be due and payable immediately upon the date set forth in the Invoice, without any deductions. Products will not be dispatched and services will not commence until successful processing of payment, excluding the case of custom research orders, in which structured payment terms will be outlined on the Order Form.

4.6 All customers' rights of retention or set-off are hereby excluded to the extent that they are not based on the same contractual relationship. Retentions or set-offs are allowed only if the customer's claim is undisputed, has become unappealable or is ready for decision.

4.7 In the event of a customer's default in payment or other apparent credit unworthiness, all remaining claims against that customer shall become immediately due and payable in full. This only applies if the customer is responsible for the default. We shall be entitled to rescind payment terms previously agreed upon and to demand payment in advance or other appropriate security with respect to pending deliveries. A customer shall be deemed unworthy of credit in particular when he files a petition in bankruptcy or composition proceedings.

5. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES

5.1 All copyrights and other intellectual property rights in connection with our products and all contents of our website remain with us. All data carriers remain our property. The customer/user may not modify, publish, transmit, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way exploit any of the products made available by us, in whole or in part, except as expressly permitted under the Contract.

5.2 We, as well as any original sources contained within our product, must expressly be named as the author of any data the customer processes further as contractually negotiated.

5.3 Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, perpetual right to use the products provided for your internal purposes or any additional purposes set out in the Order Form.

5.4 In the event that the parties agree on a "Single User License" under the Order Form, this means that only one (1) individually named user of an organization shall be entitled to access the report(s). In the event that the parties agree on a "Site License" under the Order Form, this means that up to ten (10) users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a "Global Site License", this means that up to ten (10) worldwide users of an organization shall be entitled to access the report. In both cases, the term "organization" refers to your specific company only and excludes any third parties, including affiliates.

6. TECHNICAL INFORMATION

6.1 We shall provide our products in the following standardized data formats: PowerPoint and PDF. For custom research reports, Excel documents may also be provided, upon request.

6.2 You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.

6.3 Upon successful processing of payment, purchases made via the online shop will be immediately available to download. For all offline purchases, upon successful processing of payment, you will receive the requested product(s) and service(s) in the aforementioned standardized data formats, and all additional data pertaining thereto within two (2) business days.

7. DEFECTS AS TO QUALITY

7.1 No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.

7.2 Likewise, no claims for defects as to quality may be derived from entrepreneurial risks – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action's merit.

7.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.

7.4 Claims for defects as to quality expire within one year from the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.

7.5 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

8. LEGAL DEFECTS

8.1 We are liable for products and services infringing on third party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.

8.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order.

8.3 In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third party rights, we shall choose one of the below actions, duly taking into consideration the customer's interests:

- procuring for the customer the right to use the service; or
- revising the service to render it free of legal violations.

8.4 Upon our request, the Customer shall assist us with the defense against third party claims according to this section 8, with each of the Parties bearing the costs of the use of its own personnel and counsel.

8.5 Claims the Customer may hold for legal defects expire in accordance with Section 7.4.

8.6 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

9. LIABILITY

9.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.

9.2 Besides Section 9.1, we are not liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health in cases of simple negligence and – subject to the limitations set forth hereinafter – due to damage caused by a breach of a material contractual obligation. Material contractual obligations are obligations that (i) you reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the outcome of performance.

9.3 In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, body or health – is limited to typical and at the time of the formation of this Contract foreseeable damage.

9.4 The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies', employees' and vicarious agents' personal liability.

9.5 Our liability for damages under warranties (Beschaffungsgarantien) is limited to instances in which the warranty expressly includes such liability.

9.6 Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 9.1 through 9.5.

10. CONFIDENTIALITY

10.1 The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:

- were already known or accessible to any third party at the time of disclosure;
 - which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information;
 - must be disclosed by order of and to a government agency or another competent third party; and
 - must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.
- In the cases of Sections b) and c) above, the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.

10.2 We may use your company name and logo as a reference so long as no contractual details are divulged.

11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

11.1 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, the place of payment is Hamburg, Germany.

11.2 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, all disputes arising from or in connection with any Contract between the Parties shall exclusively be resolved through the courts of Hamburg. Governing law is German law under exclusion of the CISG.