



Global E-Commerce Intelligence
we report, you grow

SAMPLE REPORT
**BRAZIL B2C E-COMMERCE
AND PAYMENT MARKET 2020 & COVID-19'S IMPACT**
PUBLICATION DATE: JULY 2020

PREFACE

OBJECTIVE

UP-TO-DATE

RELIABLE

A LIST OF ADVANTAGES

- yStats.com provides secondary market research: By using various sources of information we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- Only reliable sources such as national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries and news portals are used as a basis for the analyses, statistical reports and forecasts.
- Our international employees research and filter all sources and translate relevant information into English. This ensures that the content of the original studies is correctly interpreted.
- yStats.com delivers all research results as PowerPoint files. All data can therefore be used directly for board presentations or be individually adapted.
- If required, yStats.com provides in-depth analysis for all research projects. Simply send us a request.

TERMS OF USE AND COPYRIGHT CONDITIONS

- This report is copyrighted. All rights reserved and no part of this report may be reproduced, stored in a retrieval system or transmitted in any form without the prior permission of the publishers.
- The information in this report does not constitute the provision of investment, legal or tax advice. Any views expressed reflect the current views of the original authors, which do not necessarily correspond to the opinions of yStats.com GmbH & Co. KG.
- The information in this report is provided for informational purposes only and without any obligation, whether contractual or otherwise. No warranty or representation is made as to the correctness, completeness and accuracy of the information given or the assessments made.
- We have taken every precaution to ensure that details provided in this report are accurate. The publishers are not liable for any omissions, errors or incorrect insertions, nor for any interpretations made from the document.

LEGAL NOTICE



OBJECTIVE

UP-TO-DATE

RELIABLE

This report is subject to the Terms & Conditions of yStats.com GmbH & Co. KG, which can be found at yStats.com. By selecting a particular license, you agree to the Terms & Conditions which pertain to said license. Please be aware that any misuse of this product or any use not in accordance with the aforementioned Terms & Conditions will result in legal action.

The licensing structure is as follows:

SINGLE USER LICENSE

■ allows one (1) user to access the downloaded report.

SITE LICENSE

■ allows up to ten (10) users of a company within a specified geographic area (i.e. country) to access the downloaded report.

GLOBAL SITE LICENSE

■ allows up to ten (10) user of a company worldwide to access the downloaded report.

GENERAL METHODOLOGY OF MARKET REPORTS

OBJECTIVE

20%

15%

UP-TO-DATE

RELIABLE

Secondary Market Research

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are 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 reported 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 include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

Definitions

- 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.

Chart Types

- 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 Subtitle, 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.

Report Structure

- 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.

Notes and Currency Values

- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies are most often used. When referencing currency values in the Action Title, the EUR values are also provided in brackets. The conversions are made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.

METHODOLOGY OF THE CURRENT REPORT

OBJECTIVE

20%

11%

UP-TO-DATE

RELIABLE

Report Coverage

- The report covers the impact of the coronavirus (COVID-19) pandemic on B2C E-Commerce and payments in Brazil.

Report Structure

- The report starts with an overview, highlighting the overall impact of COVID-19 on B2C E-Commerce development in the respective country.
- Next, the “Sales & Shares” section covers the development of B2C E-Commerce prior to the outbreak and contains a forecast for E-Commerce’s share of total retail sales post-COVID-19.
- Afterwards, the section “Products & Verticals” shows the leading product categories purchased online during the pandemic and COVID-19’s impact on selected products and services.
- The “Trends” section highlights the implications of the outbreak for the development of online shopping trends, such as cross-border E-Commerce.
- The next section, “Payment”, covers the payment methods most used by online shoppers, and the impact of the pandemic on online and contactless payments.
- The “Delivery” section provides insights on E-Commerce delivery and its perception by online shoppers before and after the COVID-19 outbreak.
- Finally, the “Players” section includes information about the impact of the Coronavirus on the leading B2C E-Commerce companies in terms of website traffic.

DEFINITIONS

OBJECTIVE

UP-TO-DATE

RELIABLE

The following expressions and definitions are used in this market report*:

- **COVID-19 / CORONAVIRUS** An infectious disease triggered by an intense acute respiratory sickness. COVID-19 was first identified at the end of 2019 in Wuhan, China, and spread worldwide, becoming known as the coronavirus pandemic.
- **B2C E-COMMERCE** the sale of products (and services) through electronic transactions via the Internet from businesses to consumers (B2C). A broader definition of retail E-Commerce applied by some sources also includes consumer-to-consumer (C2C) sales.
- **E-COMMERCE SALES** the total sales generated either on the E-Commerce market in a certain country or region, or the total sales generated through E-Commerce by a player on the market.
- **ONLINE SHOPPERS** the total number of inhabitants in a certain country or region that participates in B2C E-Commerce.
- **ONLINE TRAVEL** the sale of goods (and services) directly to consumers in other countries, with orders delivered from the country where the foreign shop is based or from a central logistics facility, i.e. across the country's borders.
- **ONLINE PAYMENT** Transfer of money made over the Internet following a consumer's payment command, includes payments for product and service purchased in B2C E-Commerce and M-Commerce.
- **E-WALLET/DIGITAL WALLET** A prepaid digital account, allowing users to store money and use it in online or mobile transactions. The examples of E-Wallets or digital wallets include Alipay and PayPal.
- **CONTACTLESS PAYMENT** Near Field Communication is a set of standards to create radio communication by bringing devices close together or having them touch each other. In that way, contactless data exchange and contactless payment transactions using an NFC-enabled smartphone or other mobile device can take place. Similarly, contactless payments can be made by credit and debit cards enabled with the contactless technology.

Note: *the definitions used by the original sources might differ from the ones stated on this chart; the exact definition used by each source, where available, is included on the respective charts

TABLE OF CONTENTS (1 OF 2)

OBJECTIVE

UP-TO-DATE

RELIABLE

1. **Management Summary**
2. **Overview**
 - Overview of COVID-19 Impact on B2C E-Commerce Market, June 2020
3. **Impact on B2C E-Commerce Sales & Shares**
 - B2C E-Commerce Sales, in BRL billion, in % YoY Change, 2011-2019
 - B2C E-Commerce Sales, in BRL billion, 2019 & 2020f
 - B2C E-Commerce Sales, in % of Total Retail Sales, 2019 & 2030f
4. **Impact on Online Shoppers**
 - Online Shopper Penetration, in % of Individuals, 2019
 - Online Shoppers, By Domestic And Global E-Commerce Websites, in millions, 2019
 - Estimated Number of New Online Shoppers and New Online Stores Emerging Since The COVID-19 Outbreak in March, May 2020
 - Change in Online and In-Store Shopping Following COVID-19, in % of Consumers, by Generation, June 2020
5. **Impact on B2C E-Commerce Product Segments & Online Verticals**
 - Top Product Categories By Growth In Number Of E-Commerce Orders, in %, Incl. Share Of Total E-Commerce, H1 2019
 - Average E-Commerce Order Value By Selected Fast Growing Product Categories, in BRL, H1 2019
 - Year-on-Year Change in E-Commerce Sales of Selected Health & Hygiene Product Categories, in %, February & March 2020
 - Year-on-Year Change in Number and Value of E-Commerce Purchases, by Selected Categories, in %, February/March 2020
 - Bi-Weekly Changes in Average Daily E-Commerce Order Number of Selected Product Categories, in %, March 15 - June 6
 - Bi-Weekly Changes in Average Daily E-Commerce Order Number of Selected Service Categories, in %, March 15 - June 6
6. **Impact on Cross-Border & Omnichannel Shopping**
 - E-Commerce Sales, in BRL bil., Total Orders, in mil., Average Consumer Spending Per Year, in BRL, Average Value Per Order, in BRL, Online Shoppers, in mil., By Domestic And International Websites, 2019
 - Breakdown Of Expectations About Online Shopping Frequency On International Websites During COVID-19, in % of Those Buying At Least Once Every 3 Months From Such Sites, April/May 2020

TABLE OF CONTENTS (2 OF 2)

OBJECTIVE

UP-TO-DATE

RELIABLE

6. **Impact on Cross-Border & Omnichannel Shopping (Cont.)**

- Most Popular Cross-Border E-Commerce Sites Among Online Shoppers, in % of Cross-Border Online Shoppers, February-March 2020
- M-Commerce Sales, in BRL billion, Orders, in millions, in % of Total E-Commerce, 2019

7. **Impact on Online Payment**

- Payment Methods Used in E-Commerce, in % of Online Shoppers, July 2019
- Selected Mobile Payment Apps Used, incl. Penetration, in % of Devices, and Active Users, in % of All Users, July 2019
- Average Attempted Fraud Share, in % of E-Commerce Sales, 2019
- Top 3 Product Categories by Attempted Fraud Share, in % of E-Commerce Sales, 2019
- Proximity Mobile Payment User Penetration, in % of Smartphone Owners, August 2019
- Proximity Mobile Payment User Penetration, in % of Smartphone Owners, by Age Group, August 2019
- Year-on-Year Change in Value of Card-Present and Card-Not-Present Payments, March 2020
- Value of Contactless Payments, in BRL million, March 2019 & March 2020

8. **Impact on B2C E-Commerce Delivery**

- Top 5 Barriers To E-Commerce, in % of Respondents, incl. Delivery-Related, September 2019
- Share Of E-Commerce Deliveries That Arrived On Time, By Regions, in %, 2018 & 2019
- Breakdown Of Delivery Time Experience With Cross-Border E-Commerce, in % of Online Shoppers, February 2020
- Causes of Negative E-Commerce Experience During COVID-19, in % of Online Shoppers Who Had Negative Shopping Experienced During COVID-19, June 2020
- Factors That Would Motivate Consumers in Brazil To Buy Online After The Pandemic, in %, June 2020

9. **Impact on B2C E-Commerce Players**

- Top 5 E-Commerce Websites, by Total Visits, March 2020 & May 2020

TABLE OF CONTENTS

OBJECTIVE

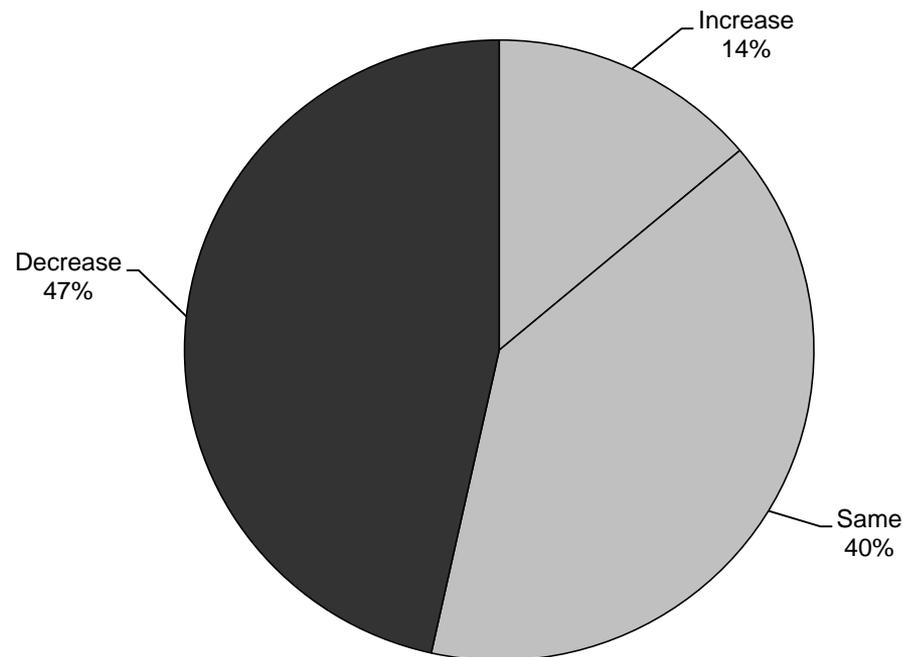
UP-TO-DATE

RELIABLE

| | | |
|----|---------------------------------|----------------|
| 1. | Management Summary | 9 – 11 |
| 2. | Overview | 12 – 13 |
| 3. | Sales & Shares | 14 – 17 |
| 4. | Users & Shoppers | 18 – 22 |
| 5. | Products & Verticals | 23 – 29 |
| 6. | Trends | 30 – 34 |
| 7. | Payment | 35 – 43 |
| 8. | Delivery | 44 – 49 |
| 9. | Players | 50 – 51 |

47% of frequent shoppers in Brazil reported that they would reduce their cross-border E-Commerce amidst the COVID-19 outbreak in 2020.

Brazil: Breakdown Of Expectations About Online Shopping Frequency On International Websites During COVID-19, in % of Those Buying At Least Once Every 3 Months From Such Sites, April/May 2020

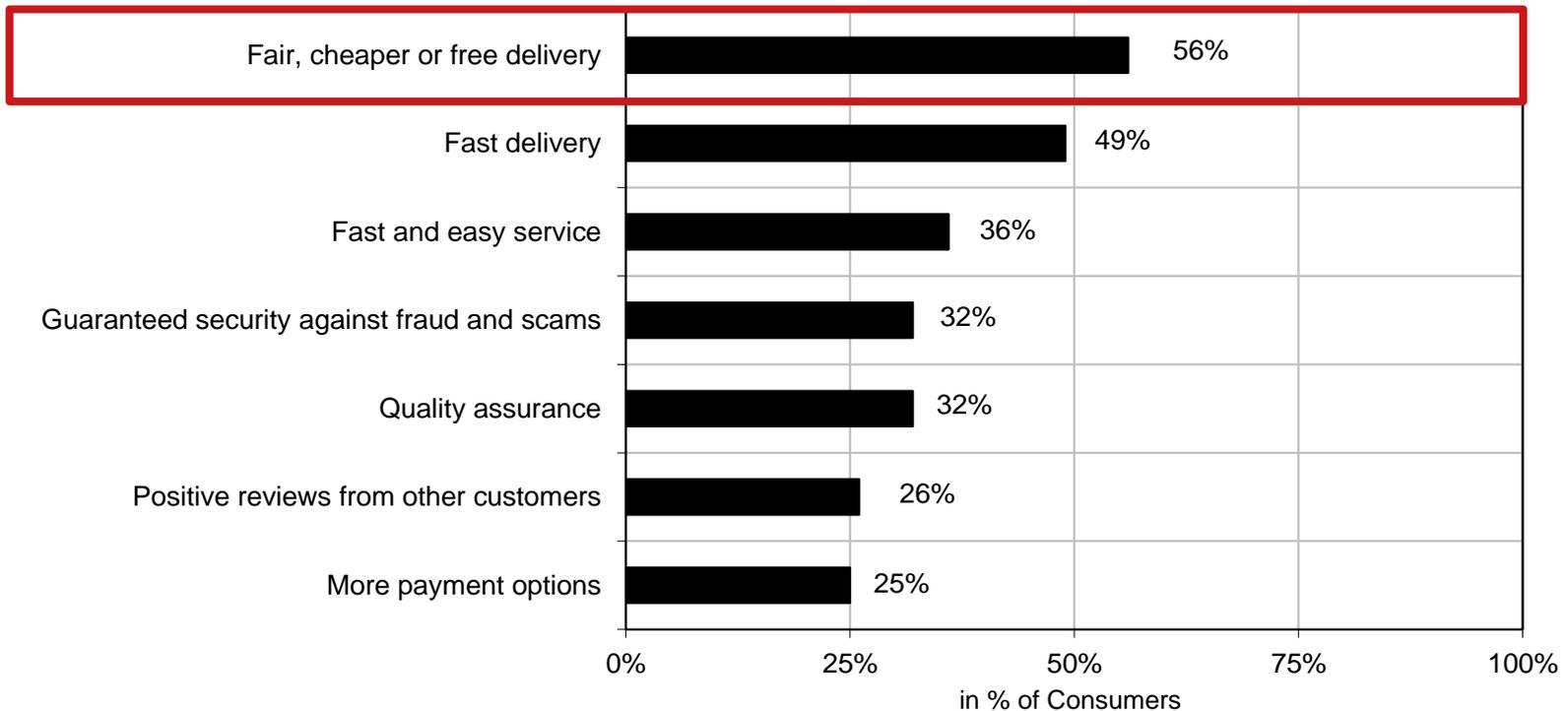


Survey: based on a survey of 1,525 online shoppers that made an online cross-border purchase at least once between January-March 2020, the base of this data is 999 responses

Source: EBANX, May 2020

“Fair, cheaper or free delivery” would encourage 56% of Brazil’s shoppers surveyed in June 2020 to buy online after the pandemic.

Brazil: Factors That Would Motivate Consumers in Brazil To Buy Online After The Pandemic, in %, June 2020



Note: does not add up to 100% due to multiple answers possible

Survey: based on a survey of 2,004 respondents, conducted between 17 and 19 of June; 32% of respondents were between 16-29, 51% were 30-49, and 17% were 50+; question asked: “What would make you buy/continue to buy online after the pandemic?”

Source: OpinionBox, June 2020



Global E-Commerce Intelligence
we report, you grow

ADDRESS

yStats.com GmbH & Co. KG
Behringstr. 28a | 22765 Hamburg | Germany

CONTACT

Phone: +49 40 - 39 90 68 50 | Fax: +49 40 - 39 90 68 51 | info@ystats.com

SOCIAL MEDIA

 [linkedin.com/company/ystats](https://www.linkedin.com/company/ystats)
 twitter.com/ystats
 facebook.com/ystats
 gplus.to/ystats.com

MORE NEWS?

Please subscribe to our Newsletter at www.ystats.com