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Meanwhile, in the advanced markets such as the USA, Japan, South Korea, the UK, Germany and France the total B2C ECommerce pace of growth is declining, but mobile shopping and new product categories, such as groceries, still offer potential for further growth. Of special importance are two leading trends in ECommerce worldwide the use of mobile devices such as tablet computers and smartphones for shopping, referred to as MCommerce, and crossborder online shopping.

MCommerce is transforming the retail industry worldwide, as mobile traffic to retail sites surges and the variety of products purchased on mobile grows. In the advanced markets of North America and Europe the share of MCommerce on total online retail already reaches 10% or several percentage points above. In emerging markets where smartphone and tablet penetration is rapidly growing the practice of online shopping through these devices is also increasing. Crossborder B2C ECommerce is growing to a multibillion dollar market, where online shoppers from such countries as the USA, Brazil, Australia and others buy directly from online merchants in the UK, China, France and other countries worldwide. New payment methods have developed and traditional payment channels have adapted to online shopping. Payment by credit card continues to predominate worldwide, however alternative payment methods such as EWallets are on the rise, by far outpacing the growth of credit card use. Mobile payments are also growing rapidly. For example, in China more than 100 million people or a quarter of mobile Internet users used mobile payments in 2013. Looking at the major players in global B2C ECommerce, US based Amazon.com Inc. remains the global leader by ECommerce revenues, but the growth leaders in the top ten are two Chinese online companies which both conducted IPO this year, Alibaba Group Holding Ltd. and JD.com Inc. Another pure play company from the top ten from which an IPO is expected is Cnova N.V.

, a newly formed ECommerce subsidiary of the French Groupe Casino. Also in the top ten online sellers are several store retailers who have intensively developed and expanded their ECommerce channels worldwide, such as WalMart Stores and Tesco. 3 Global B2C ECommerce Market 2014 Table of Contents 1 of 49 1. MANAGEMENT SUMMARY 2. GLOBAL MCommerce Trends, 2014. MCommerce Sales, by Tablets, Smartphones and Total, in USD billion and in % YoY Growth, 2012 2018f. Smartphone and Tablet Penetration in Selected Countries, in % of Total Adult Population, 2013. Breakdown of Mobile Shopping Intention, in % of Mobile Users, March 2013. Smartphone Owner Penetration on Total Population and Mobile Shopper Penetration on Smartphone Owners, in %, by Selected Developed Markets, May 2013. Smartphone Owner Penetration on Total Population and Mobile Shopper Penetration on Smartphone Owners, in %, by Selected Emerging Markets, May 2013. Mobile Shopper Penetration, by Online Purchases Made on Tablets and Smartphones, in % of Smartphone and Tablet Owners, by Region, 2013. Breakdown of Frequency of Mobile Purchase, in % of Online Shoppers, by Tablet and Mobile Phone or Smartphone, 2013. Frequency of App and Browser Usage for Shopping on Mobile Phone or Smartphone, in % of Mobile Shoppers, 2013. Products and Services Purchased on Mobile, in % of Mobile Shoppers, March 2013. CrossBorder B2C ECommerce Trends, 2014. CrossBorder B2C ECommerce Trade Balance of Top Six Markets Leading by B2C ECommerce Exports, Incl. B2C ECommerce Exports and B2C ECommerce Imports, in USD million, 2013. CrossBorder B2C ECommerce Flow Between Top Six Markets Leading by B2C ECommerce Exports, in USD million, 2013. Breakdown of Total B2C ECommerce Imports of Top Six Markets Leading by B2C ECommerce Imports, by Country of Import and by Top Product Categories, in %, 2013e. Luxury B2C ECommerce Trends, 2014. Share of B2C ECommerce on Total Luxury Retail, by Global and Emerging Markets, in %, 2013.

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