



**Asia-Pacific
Economic Cooperation**

2013/SOM3/CTI/WKSP1/008

Recommendations for Future Cooperation

Submitted by: Thailand



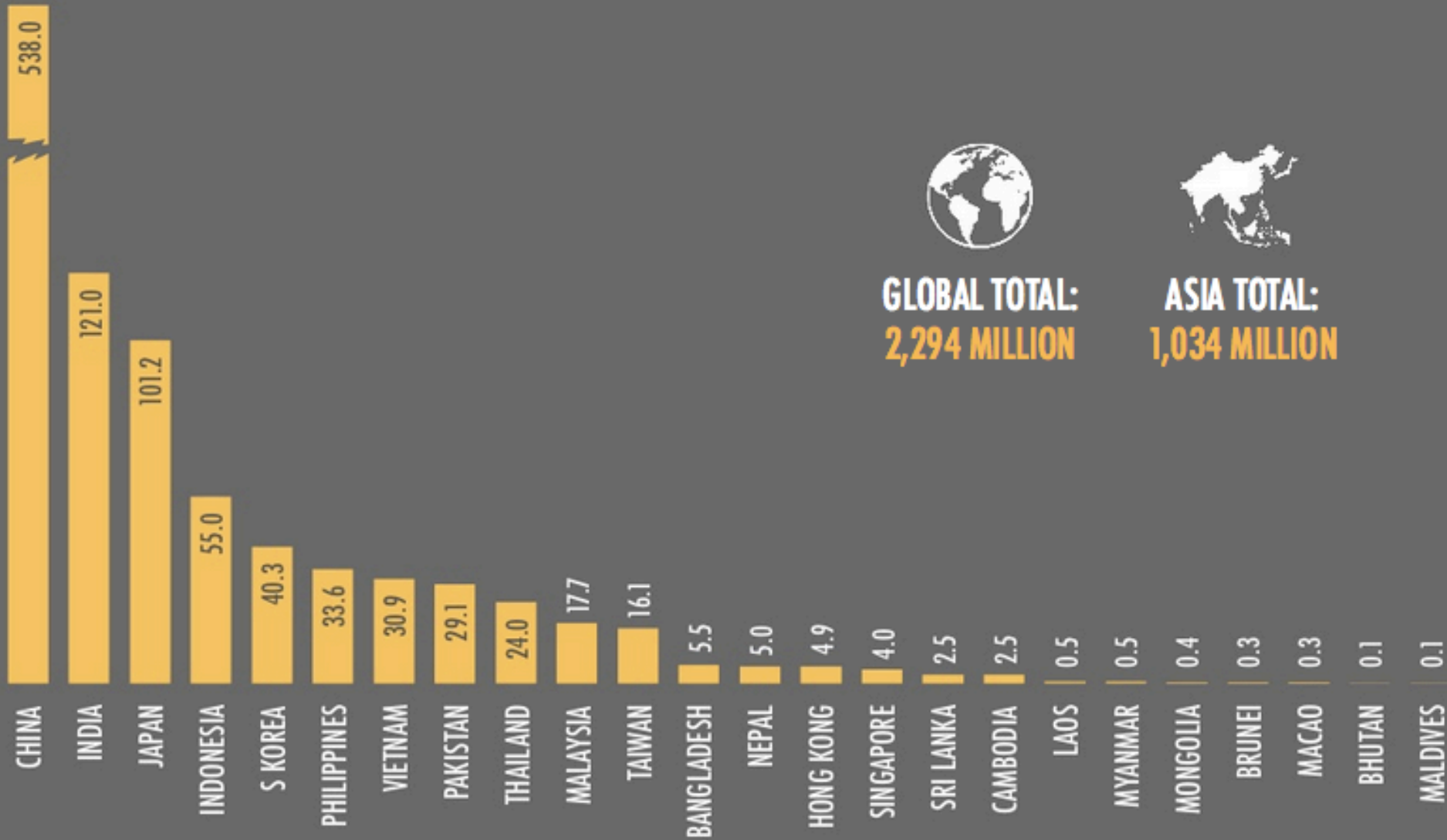
**Workshop on Building and Enhancing FTA
Negotiation Skills on e-Commerce
Medan, Indonesia
27-28 June 2013**

Recommendations for future cooperation

Pawoot P.

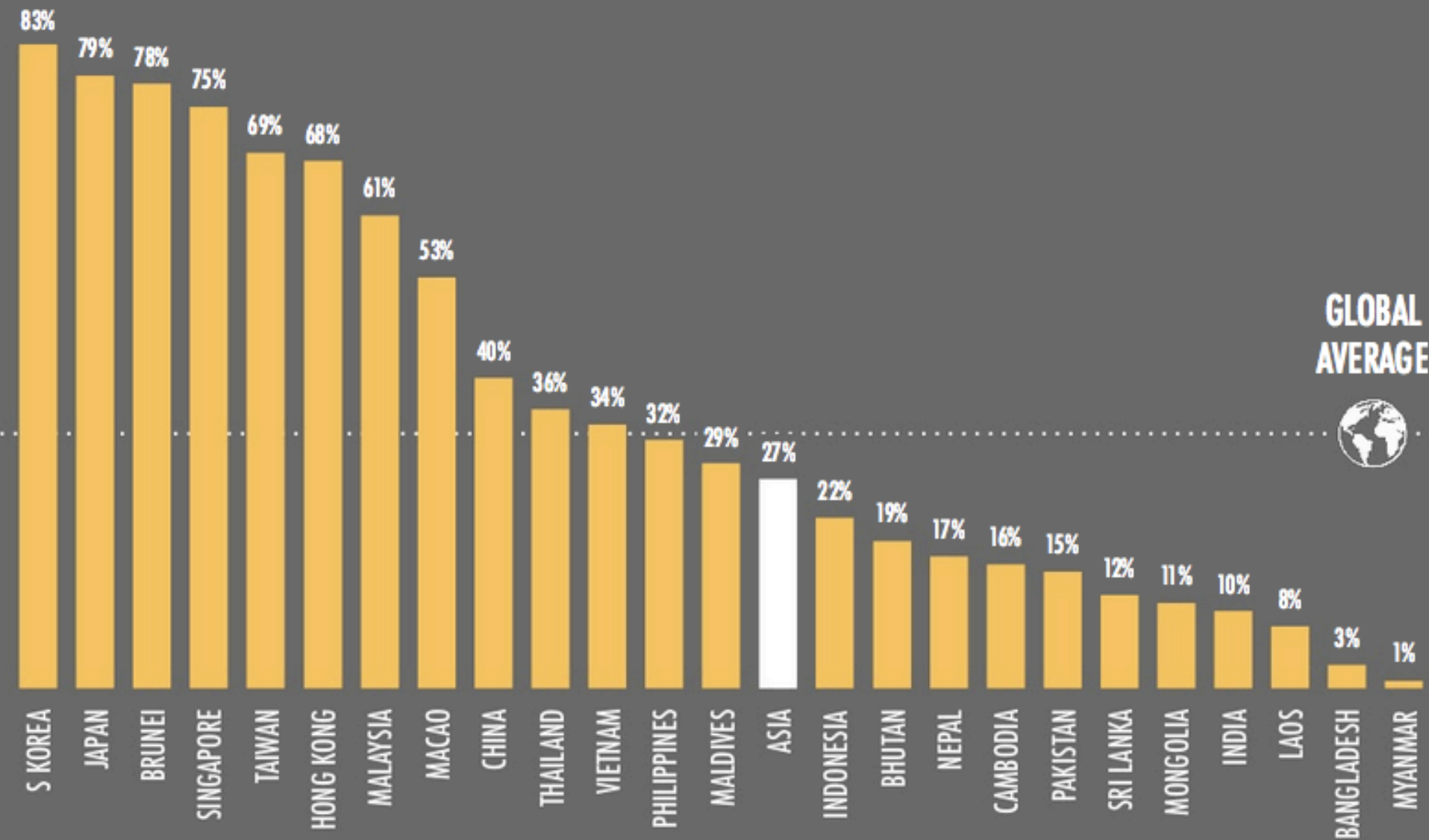
OCT
2012

INTERNET USERS (MILLIONS)



OCT
2012

INTERNET PENETRATION



Asia E-Commerce Retail Forecast

(Unit: US\$ bn)


Geographies	Categories	2012	2013	2014	2015	2016	2017	CAGR	2018	2019	2020
China	Retailing	1,567.1	1,769.2	1,999.6	2,254.8	2,520.5	2,811.1	12.4%	3,159.6	3,551.4	3,991.7
	Internet Retailing	64.4	94.3	134.9	182.4	223.0	271.1	33.3%	361.3	481.7	642.2
	EC penetration	4.1%	5.3%	6.7%	8.1%	8.8%	9.6%		11.4%	13.6%	16.1%
India	Retailing	389.1	438.2	490.9	545.4	603.1	663.3	11.3%	738.0	821.1	913.5
	Internet Retailing	1.6	2.1	2.6	3.2	3.8	4.4	22.4%	5.4	6.6	8.0
	EC penetration	0.4%	0.5%	0.5%	0.6%	0.6%	0.7%		0.7%	0.8%	0.9%
Indonesia	Retailing	137.3	151.3	167.1	182.8	199.7	218.0	9.7%	239.1	262.2	287.6
	Internet Retailing	0.1	0.1	0.1	0.2	0.2	0.2	25.2%	0.3	0.4	0.5
	EC penetration	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%		0.1%	0.1%	0.2%
Japan	Retailing	1,339.5	1,343.5	1,351.8	1,365.8	1,382.9	1,400.8	0.9%	1,413.4	1,426.1	1,438.9
	Internet Retailing	52.0	57.3	63.0	69.1	75.2	81.2	9.3%	88.7	97.0	106.0
	EC penetration	3.9%	4.3%	4.7%	5.1%	5.4%	5.8%		6.3%	6.8%	7.4%
Malaysia	Retailing	35.1	36.5	38.1	39.8	41.6	43.6	4.4%	45.5	47.5	49.6
	Internet Retailing	0.3	0.3	0.4	0.5	0.5	0.6	15.5%	0.7	0.8	0.9
	EC penetration	0.8%	0.9%	1.0%	1.1%	1.3%	1.4%		1.6%	1.7%	1.9%
Philippines	Retailing	62.0	66.5	71.6	77.1	83.2	89.8	7.7%	96.8	104.2	112.3
	Internet Retailing	0.3	0.3	0.4	0.4	0.4	0.5	8.6%	0.5	0.6	0.6
	EC penetration	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%		0.5%	0.5%	0.5%
Singapore	Retailing	23.9	25.1	26.2	27.3	28.4	29.4	4.3%	30.7	32.0	33.4
	Internet Retailing	0.7	0.7	0.8	0.9	1.0	1.2	12.0%	1.3	1.5	1.7
	EC penetration	2.8%	3.0%	3.2%	3.4%	3.7%	4.0%		4.3%	4.7%	5.0%
Taiwan	Retailing	94.0	97.8	101.5	105.1	108.6	112.0	3.6%	116.0	120.1	124.4
	Internet Retailing	3.3	3.5	3.7	3.8	4.0	4.1	4.7%	4.3	4.5	4.7
	EC penetration	3.5%	3.6%	3.6%	3.6%	3.7%	3.7%		3.7%	3.8%	3.8%
Thailand	Retailing	78.9	83.9	89.4	95.0	100.7	106.6	6.2%	113.2	120.2	127.7
	Internet Retailing	0.6	0.7	0.8	0.9	0.9	1.0	10.3%	1.1	1.2	1.4
	EC penetration	0.8%	0.8%	0.9%	0.9%	0.9%	0.9%		1.0%	1.0%	1.1%
Vietnam	Retailing	63.1	71.9	81.6	92.1	103.6	115.8	12.9%	130.8	147.7	166.8
	Internet Retailing	-	-	-	-	-	-	-	-	-	-
	EC penetration	-	-	-	-	-	-	-	-	-	-

Research Sources:

Retailing: Euromonitor from trade sources/national statistics

Internet fundamental data

Thailand Broadband Internet Subscribers

View Selection: Summary Table 

	Year	1Q	2Q	3Q	4Q
Broadband	2003	5,032	6,141	8,205	11,611
	2004	29,422	42,821	93,845	164,775
	2005	292,061	341,909	490,286	555,495
	2006	638,884	710,025	817,529	893,548
	2007	1,019,581	1,091,779	1,258,820	1,293,341
	2008	1,663,270	1,796,409	1,937,281	2,072,799
	2009	2,179,340	2,320,876	2,473,728	2,624,278
	2010	2,750,309	2,864,977	3,027,098	3,188,618
	2011	3,341,671	3,483,736	3,553,303	3,791,313
	2012	3,929,278	4,054,084	4,181,097	4,357,398

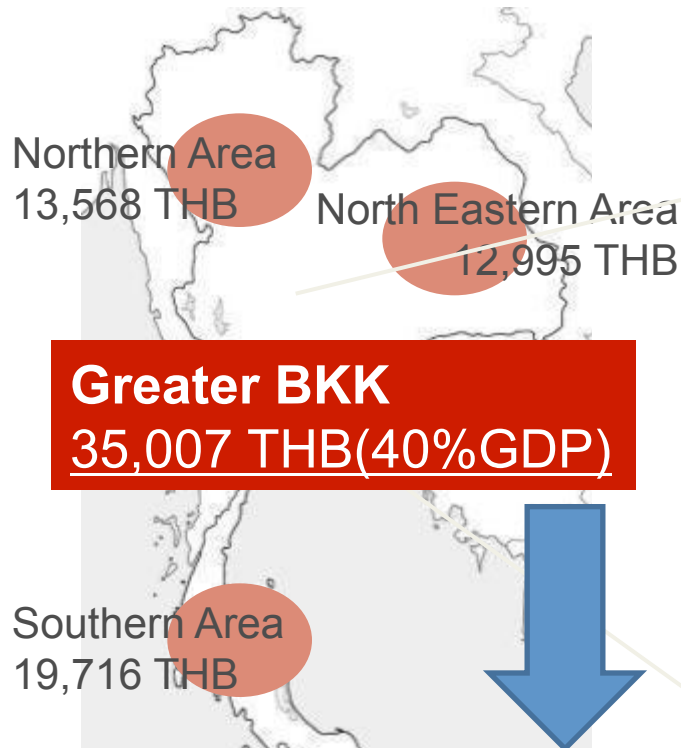
Last updated: 15 January 2013

** Estimated information for Q4 Year 2012.

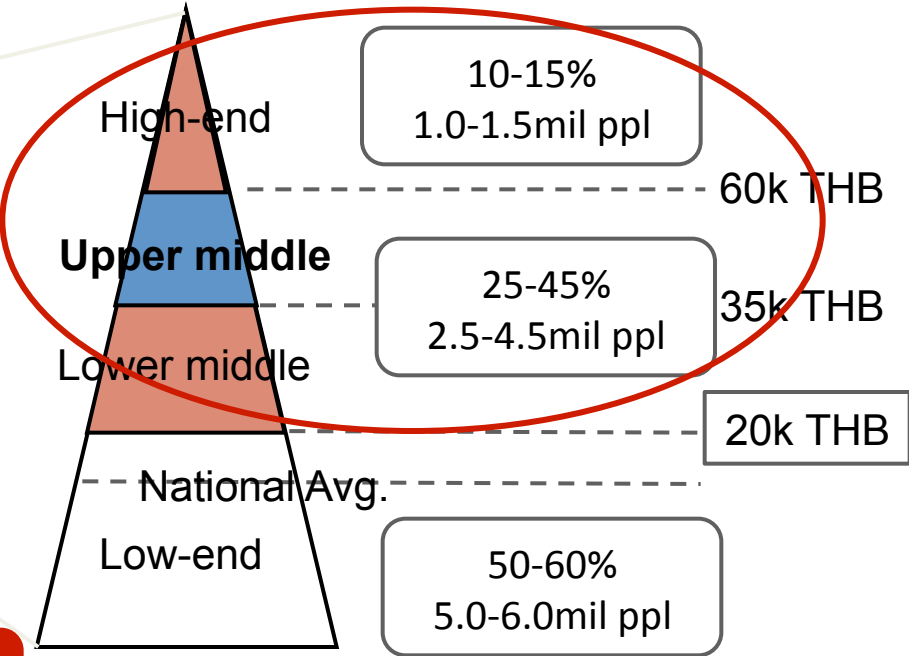
Source: Operators

Upper-Middle Households in Greater Bangkok

10-15% of total population in Greater Bangkok are middle income (Monthly income 18,660 Baht (622USD) up user ~ 6.5 M people



Avg. monthly household income 18,660 THB

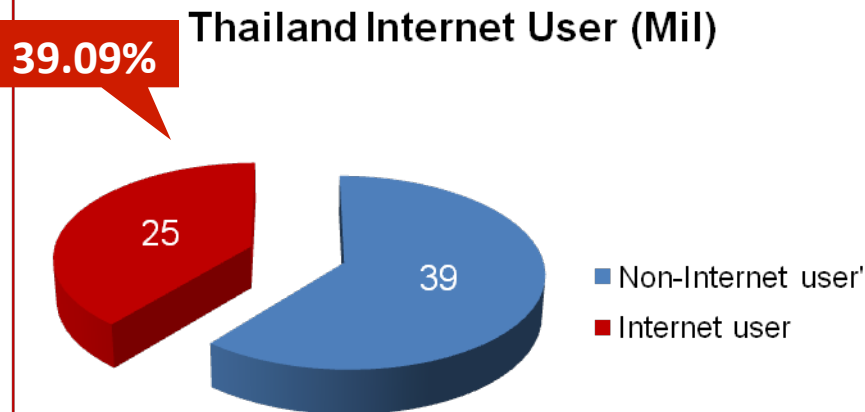


Thailand GDP/person: 3,904 USD (2009)
Bangkok GDP/person: 9,445 USD (2009)



General Internet Usage In Thailand

Internet penetration in Thailand is 40%,
and more than half Internet users has online shopping experience



Truehits.net Web Award : Thai Internet Usage 2011



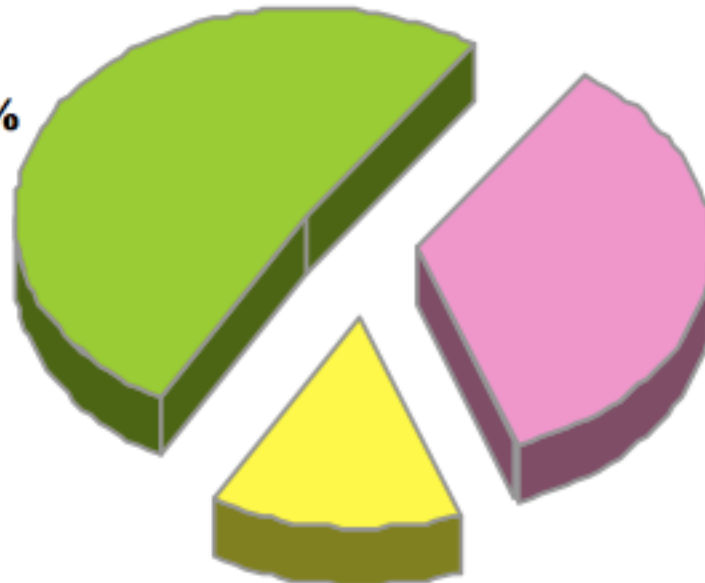
NECTEC "Internet User Profile Survey", Dec 2010

Majority of internet user in greater Bangkok
20-39 yrs Bachelor degree / 15,000THB-50,000THB salary

Payment Method

Offline
Payment

52.1%



Offline & Online Payment

33.7%

Online Payment

14.2%

วิธีออนไลน์ที่ใช้ ^{1/}

วิธีออฟไลน์ที่ใช้ ^{1/}

Offline Payment

- Bank Transfer
- COD
- Pay with Post Office
- Payment Service Provider
- Other

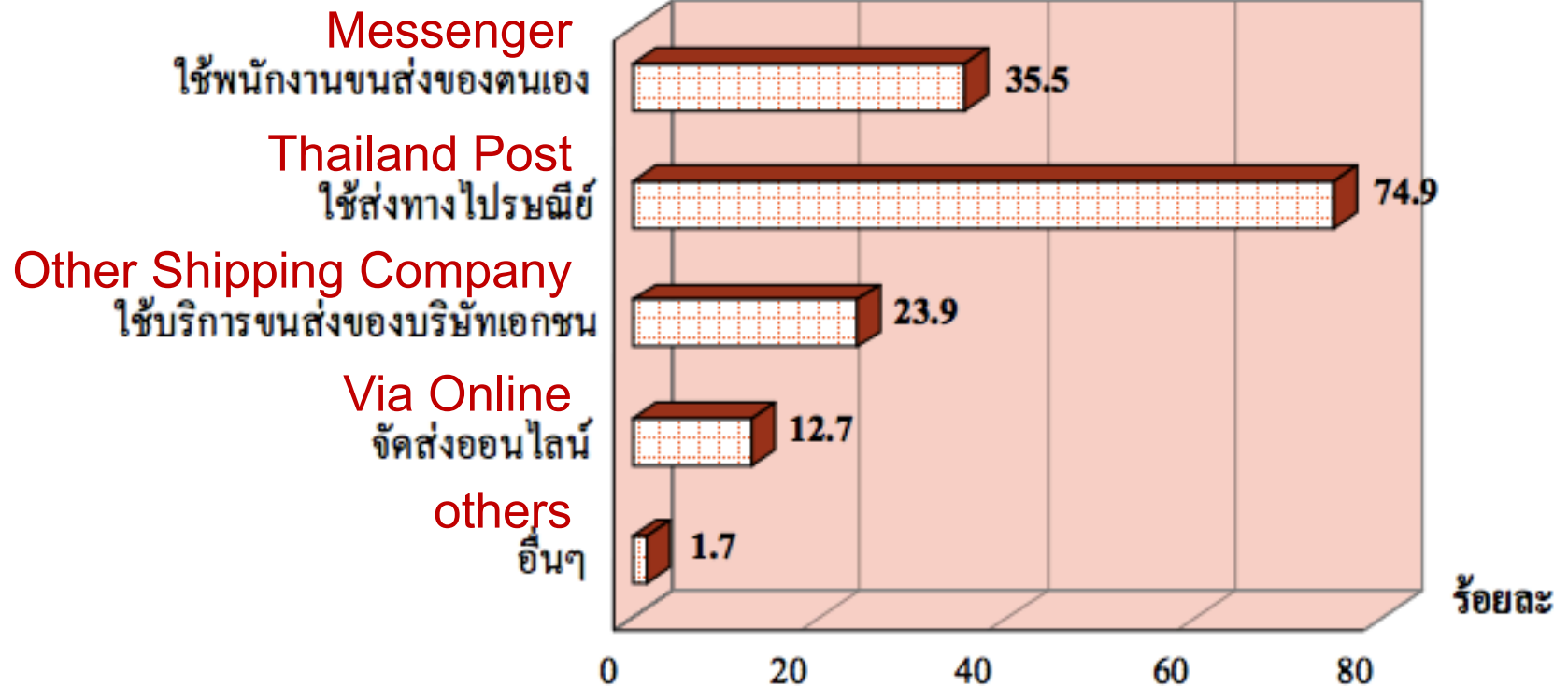
79.3
51.9
29.0
7.2
2.9

- E-Banking
- Credit Card
- Payment Provider
- FEDI payment
- Mobile Payment
- Others

65.6
44.5
23.7
5.9
5.7
2.7

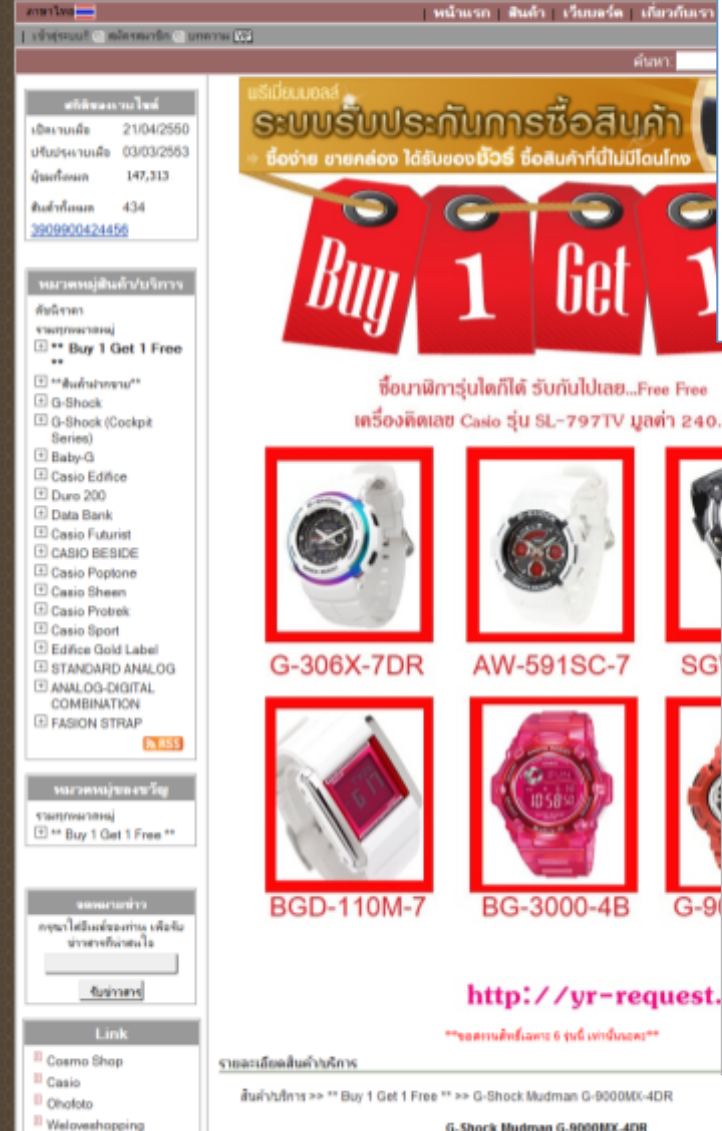
Shipping Method

วิธีการจัดส่งสินค้า^{1/}



หมายเหตุ : 1/ ตอบได้มากกว่า 1 คำตอบ

* ข้อมูลจาก สำนักงานสถิติแห่งชาติ 2009



“ปัญหาของร้านคือขาดความน่าเชื่อถือ
การรับรองจากทาง TARAD.com ว่าร้าน
 เราไม่โกงลูกค้าแน่นอน ทำให้ยอดขาย
 เดือนโตขึ้น 2,252% ดีใจมากๆ ค่ะ”



คุณธนัญญา เจ้าของร้าน



Cyber Monday 2011

IBM Benchmark:

Cyber Monday

Follow the Smarter Commerce trends as they unfold at #SmarterShopping and #SmarterCommerce

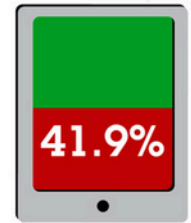
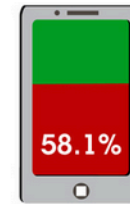
Online Spending



Mobile Commerce

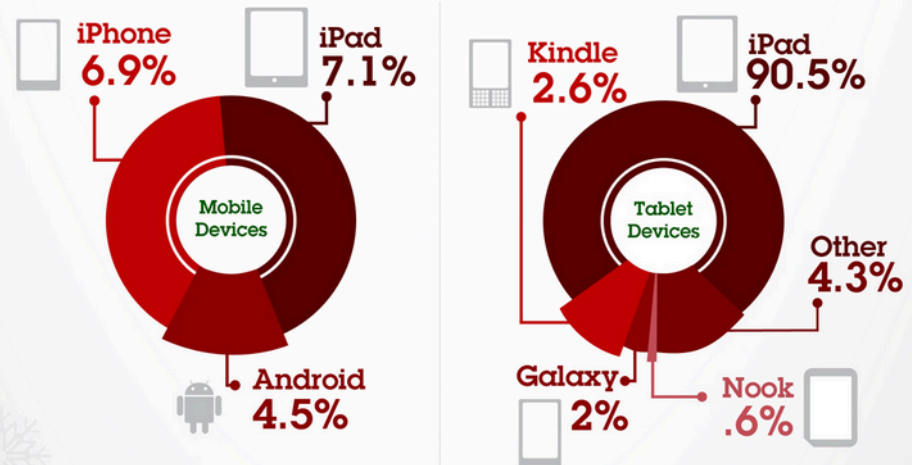


Sales on mobile devices accounted for 12.9% of all online sales

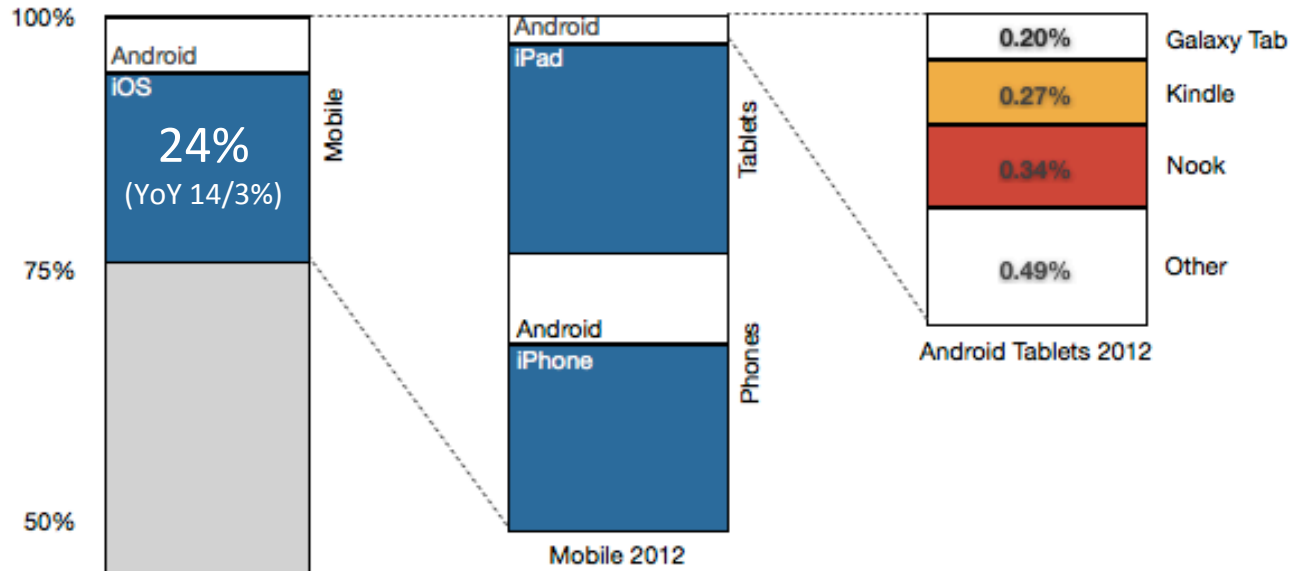


Mobile traffic of phones vs. tablets

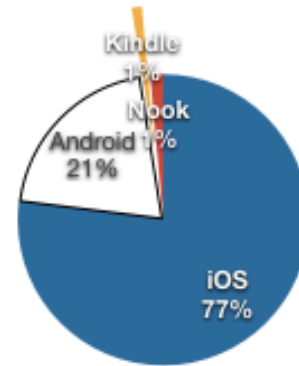
Mobile Breakdown



Share of traffic sources: US online shopping Thanksgiving and Black Friday 2012



Platforms Share of US Mobile Thanksgiving Shopping Traffic



Source: IBM Digital Analytics Benchmark



Mobile Commerce

Traffic Mobile Share 29%, GMS 13%

Q1, UU growth +4% and GMS growth 7.47%

- Top Traffic from Smart Phone
- Top Sale from Tablet
- Total traffic Mobile share from PC , 29% mainly came from 17% Smart Phone
- Total GMS Mobile share from PC 13%, mainly from tablet 8%

Mobile Commerce Hourly Trend on Q1 - 2013

12:00, 16:00 and After 22:00 Mobile Peak time



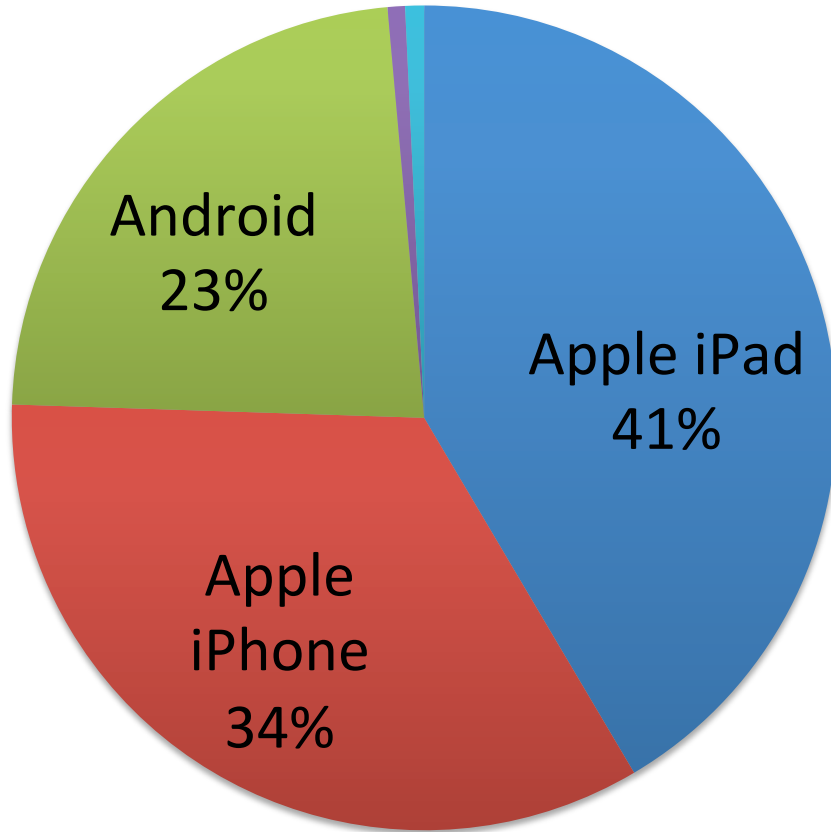
Summary information

- The similar peak time of PC and MB is about 9.00 – 12.00, 15.00 , 20.00
- The difference peak time of PC and MB is the night time MB 18.00 – 20.00 while PC after 20.00 – 21.00

Device Share by Traffic

Blackberry
1%

Nokia
1%



iOS = 75%
Android = 23%
Blackberry = 1%
Nokia = 1%

Thai E-Commerce Association



Recommendation

Recommendation

- Collaboration between association
- Marketplace Linkage, Regional Marketplace
- Regional Standard
(Shipping, Payment, Regulation & Policy, Language)
- Shipping & Logistic
- Tax and Custom
- Regional Campaign and Stimulate EC
- Pilot project
 - Trial some business buy-sell online

Recommendation (next)

- Mobile Commerce Collaboration

Will be more...

Kob Kun Kub (Thank You)

Pawoot (Pom) Pongvitayapanu
Managing Director and Founder

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