

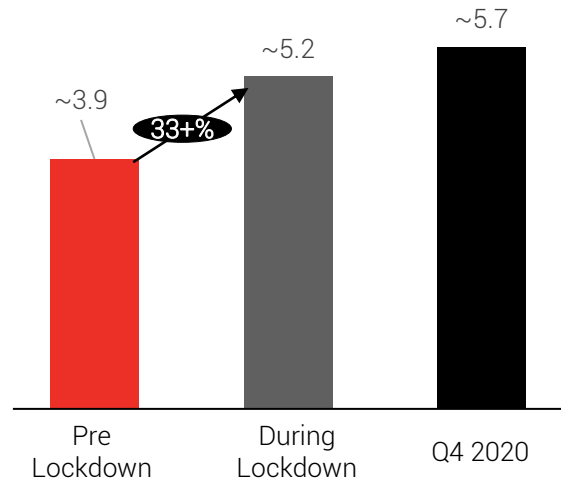


## Ecommerce Media Pack – COVID Impact

KSA - June 2020

## Etail Market Size – KSA

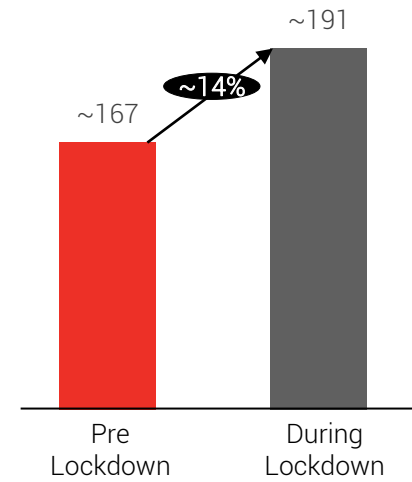
(Annualized GMV in USD Bn) (2020)



\*GMV= Gross Merchandise Value

## E-Tail #Orders/day - KSA

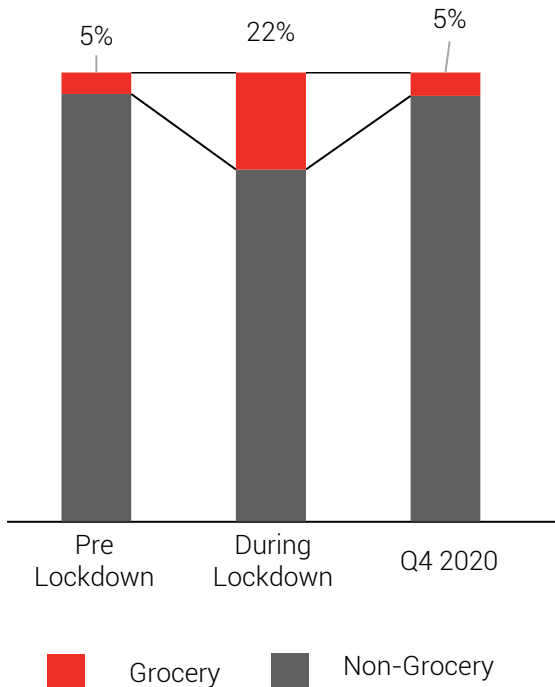
('000 Orders/day) (2020)



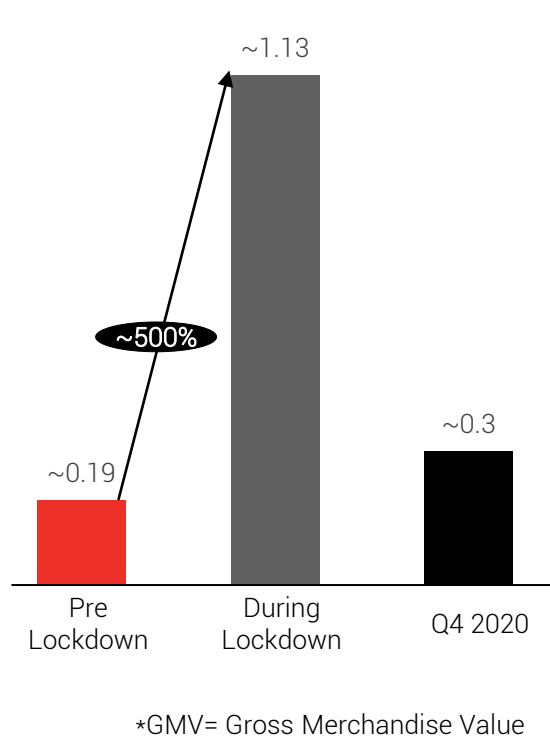
1. E-Tail in KSA is a USD ~ 5.2 Bn market currently. It saw a jump of over 33% since onset of Covid. It is expected to keep growing exponentially through Q4 2020
2. The number of orders/day have increased by ~14% since Feb 2020

# KSA Online Grocery (E-Grocery) Summary

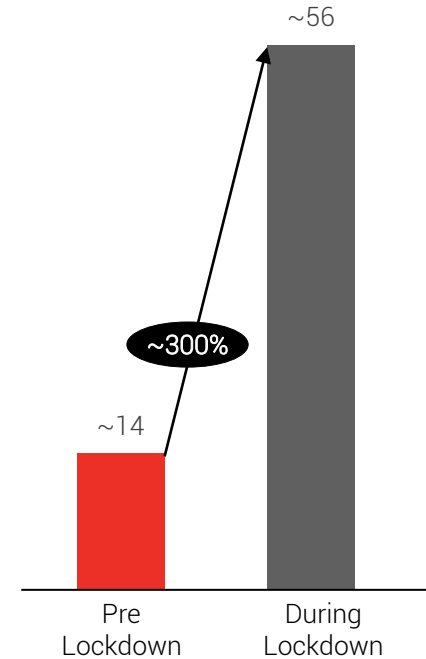
**E-Grocery Penetration – KSA**  
(% Total Online Market) (2020)



**E-Grocery Market Size – KSA**  
(Annualized GMV in USD Bn) (2020)



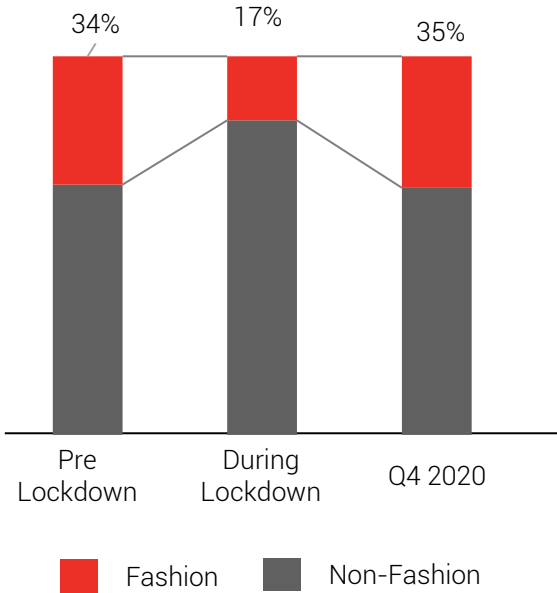
**E-Grocery Daily Orders – KSA**  
(‘000 Orders/day) (2020)



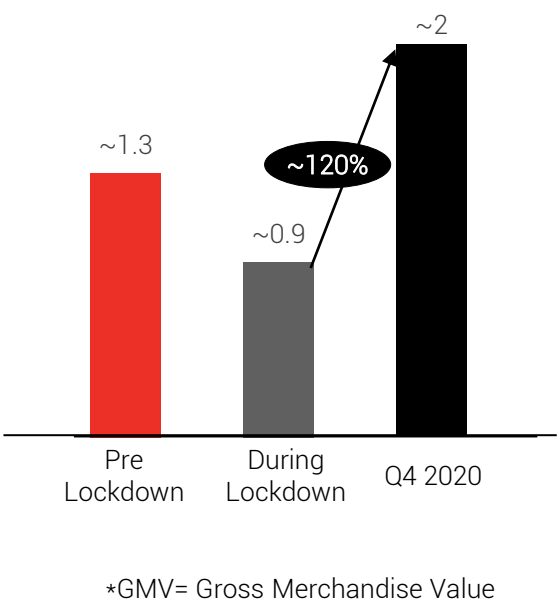
1. Penetration in the E-tail market jumped from 5% to 22% due to fear of stepping out during the pandemic, high digital adoption & ease of online payments, and convenience of doorstep delivery
2. E-Grocery in KSA is a USD ~ 1.13 Bn market currently. It grew at the rate of ~500% compared to pre-covid. However, it is expected to return to near pre-Covid numbers due to low stickiness of KSA consumers.
3. The number of orders/day have increased by 300% since Feb 2020

# KSA Online Fashion Summary

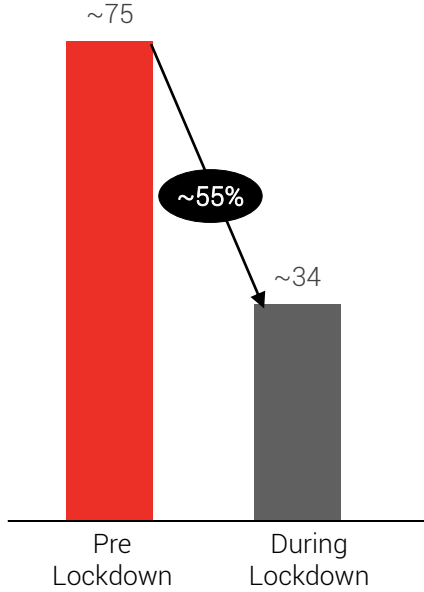
**Online Fashion Penetration – KSA**  
(% Total Online Market) (2020)



**Online Fashion Market Size – KSA**  
(Annualized GMV in USD Bn) (2020)



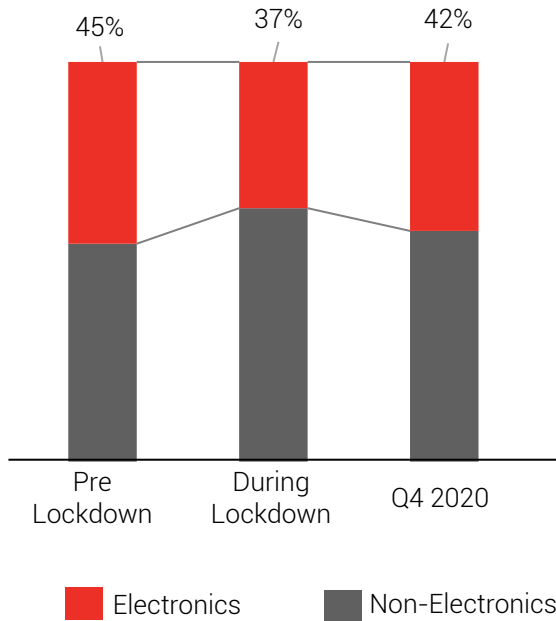
**Online Fashion Daily Orders – KSA**  
(‘000 Orders/day) (2020)



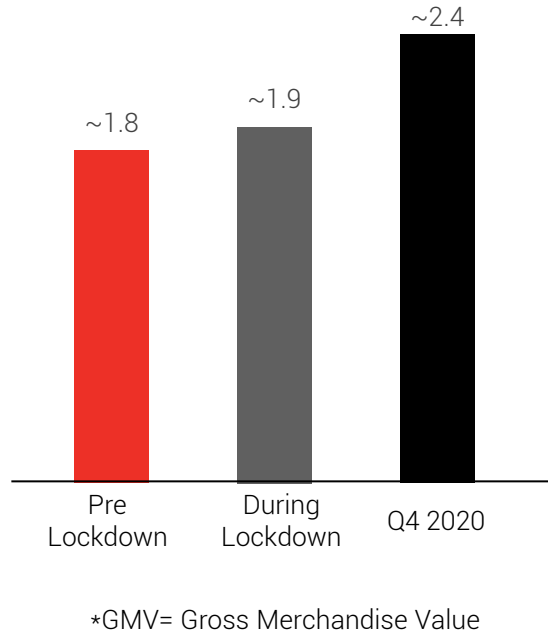
1. Penetration in the E-tail market dropped from 34% to 17%; However, it’s expected to pick up due to changing customer behavior, more festive and social occasions, and high stickiness of online buying
2. Online Fashion in KSA is a USD ~ 0.9 Bn market currently. Lack of occasions and covid sentiment has halted the growth. However, the growth is expected to pick up by the final quarter of 2020
3. The number of orders/day dropped by 55% due to supply chain bottlenecks in cross-border trade since Feb 2020

# KSA Online Electronics Summary

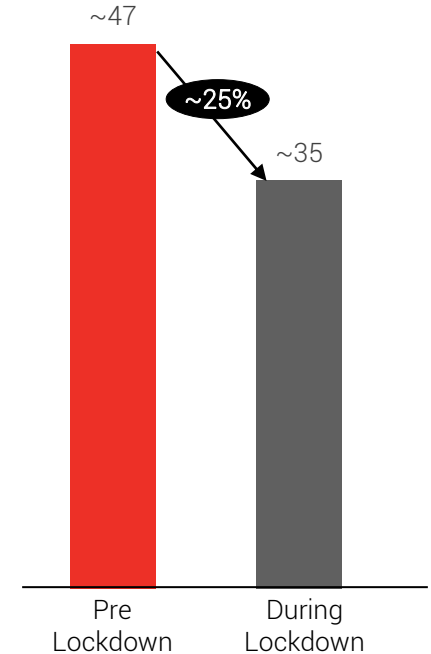
## Online Electronics Penetration – KSA (% Total Online Market) (2020)



## Online Electronics Market Size – KSA (Annualized GMV in USD Bn) (2020)



## Online Electronics Daily Orders – KSA ('000 Orders/day) (2020)




1. Penetration in the E-tail market dropped from 45% to ~37%, but it's expected to recover due to transition toward new normal and increased shift toward digital
2. Online electronics in KSA is a USD ~ 1.9 Bn market currently. The industry had slow growth due to curtailed spending by people amidst pandemic fears. But, the growth is expected to be much faster towards the end of year in Q4
3. The number of orders/day decreased by 25% since Feb 2020 indicating an increase in order values as customers bought high value products such as laptops, tables and gaming devices



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