

A young man with a spiky hairstyle is focused on his work at a desk in a modern office. He is wearing a green jacket and is looking at a laptop. In the background, other people are working at their desks, and there are large windows. The office has a clean, professional look with wooden desks and black chairs. A large monitor in the foreground shows a website with the word 'CYBER' visible. The overall atmosphere is one of a busy, collaborative work environment.

HIGH LEVEL SEMINAR ON ECOMMERCE FOR DEVELOPMENT

*BY: FRIENDS OF ECOMMERCE FOR DEVELOPMENT (FED)
VENUE: WTO, GENEVA*

HELLO

I'M M. A. MANNAN

FROM PAKISTAN

PRESIDENT & CEO

TCS HOLDINGS

“Pakistan’s economy has been growing for a number of years and it’s growing middle class, which will expand from an estimated 40 million people today to 100 million people by 2050, represents a powerful engine for change, demanding both improved services and greater access to opportunities.”

- Daniel Runde, Forbes

Video will be inserted
Topic: Destination Pakistan



LANDSCAPE

***THE E-COMMERCE
OPPORTUNITY***

200,000,000+

TOTAL POPULATION

36%

URBAN

64%

RURAL

6TH

MOST POPULOUS NATION IN THE WORLD

4TH

LARGEST MIDDLE CLASS POPULATION IN DEVELOPING ASIA

8MN+

DIASPORA AROUND THE WORLD

34,400,000+

INTERNET USERS



18%

INTERNET PENETRATION



1BN

NEXT NO. OF INTERNET USERS ARE GOING TO COME FROM PAKISTAN, INDIA, INDONESIA, BRAZIL, CHINA AND BANGLADESH



80%

SPEND MORE THAN AN HOUR ONLINE PER DAY



44%

ACCESS INTERNET VIA SMARTPHONES



28MN+

USERS ON TOP SOCIAL NETWORKS



65%

OF SOCIAL NETWORK USERS ARE UNDER THE AGE OF 25

Source:

"We are Social" international conversation agency Singapore 2014

MOBILE SUBSCRIBERS

66%

MOBILE PENETRATION

5TH

LARGEST BASE OF MOBILE USERS IN ASIA

110MN

3G/4G EXPECTED USERS BY 2019



126,300,000

Source:

"We are Social" international conversation agency Singapore 2016

1.5BNS\$

IS THE ESTIMATED PAKISTAN'S E-COMMERCE POTENTIAL

45MNS\$

ESTIMATED E-COMMERCE SALES, IN SPITE OF THE POTENTIAL, THE PAKISTANI MARKET REMAINS UNDERSERVED, CONVERTING TO

3%

OF THE POTENTIAL!

PAKISTAN STOCK MARKET (KSE100)



SOURCE: WWW.TRADINGECONOMICS.COM | KARACHI STOCK EXCHANGE

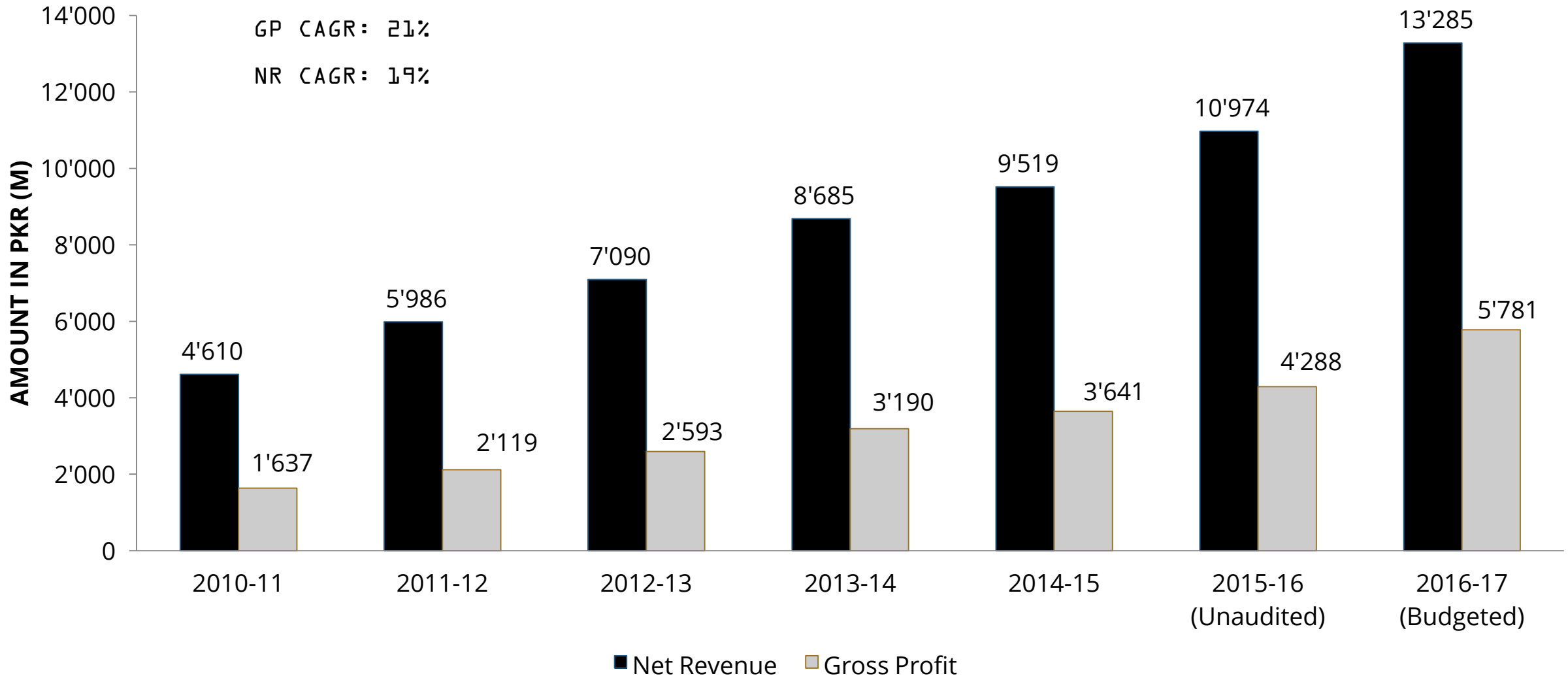
ASIA'S BEST PERFORMING STOCK MARKET

40,340 POINTS

REVENUE & PROFIT TREND



HOLDINGS
(Private) Limited



CHALLENGES

4 BOTTLENECKS TO E-COMMERCE GROWTH

4



CUSTOMER EXPERIENCE

With a reluctance to rely on technology and the internet, it is imperative that the very first customer experience establishes a strong foothold of trust and reliability for the customers.

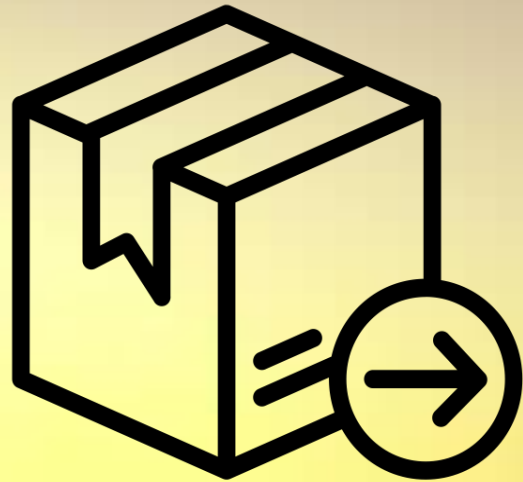


AWARENESS

With a population of 200 Million and an internet penetration rate of 18%, the population of Pakistan remains largely unaware of the existence of the e-commerce world and the plethora of benefits it brings to an economy.

PAYMENTS

Being a society in which COD still accounts for majority of online transactions, it is imperative to build upon the foundations of legislation, seller responsibility and the customer to enable a shift towards electronic payments.



LOGISTICS

Despite having a number of competing logistic companies, the e-commerce industry requires customized solutions catered towards the online shopper.



***CURRENT
SCENARIO***

THE BUSINESS POTENTIAL

3

BLACK FRIDAY – NOVEMBER 25, 2016

\$14 MILLION IN E-COMMERCE SALES ON A SINGLE DAY IS A MILESTONE FOR ALL OF PAKISTAN

Orders equal to two regular days in the **first 10 seconds** of the sale

55% of the total orders were on a mobile device

60% traffic on mobile

35% of the total orders were prepaid transactions

More **grocery & beauty bundles** were sold on black Friday than in all of 2016

60% deliveries made before the end of event

1000+ phones delivered in 120mins

First time ever **motorbikes & gold coins** sold online

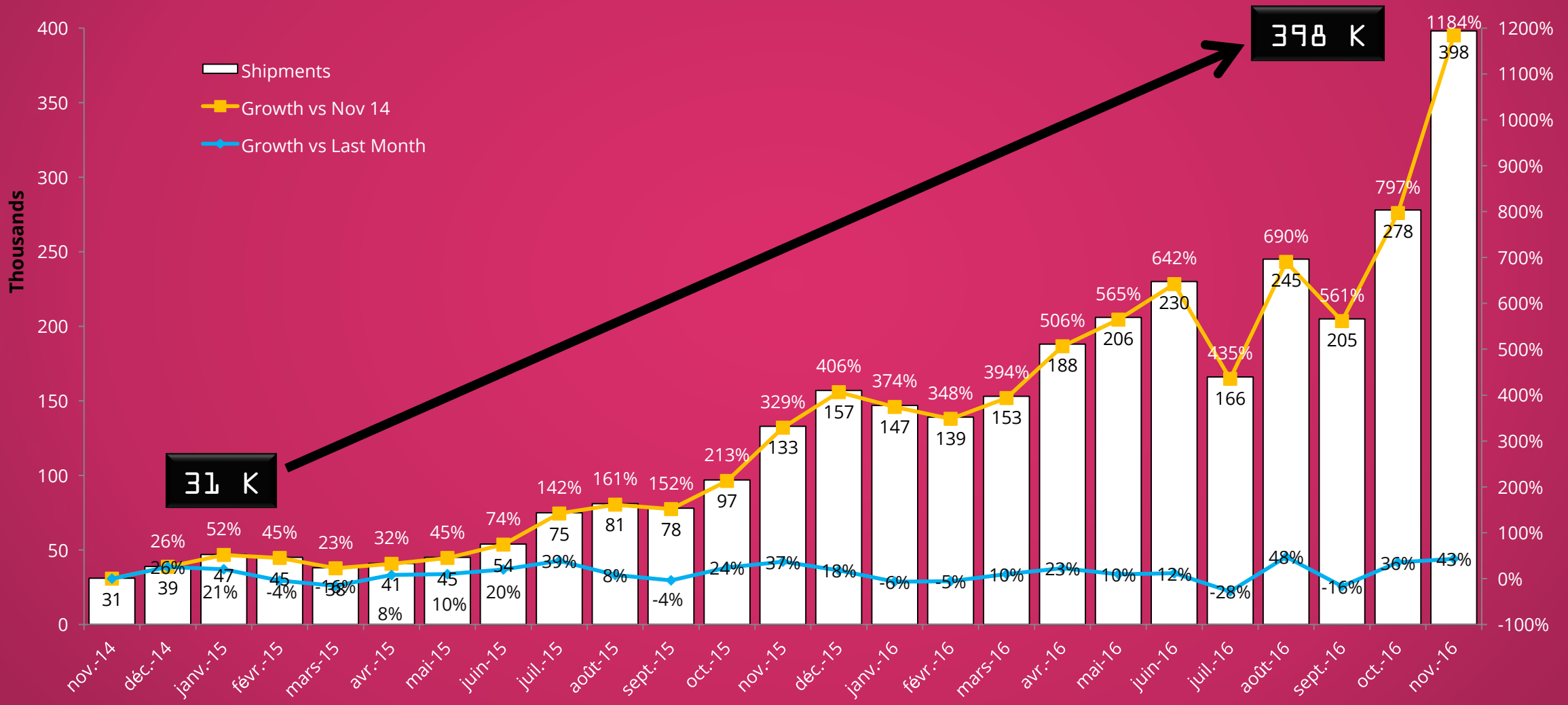
Outreach: **50%** urban – **50%** rural

FRONT-END ONLINE STORE ORDER TREND

961% growth in orders in 2015-16



BUSINESS "EXPLOSION" IN E-COMMERCE SHIPMENTS



THANKS

ANY QUESTIONS?

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