

tmō group

Southeast Asia eCommerce Outlook 2025

May 2025



About This Series

This outlook selects key information from the markets of five Southeast Asian countries (national overview, eCommerce environment, customs duties, laws and regulations, etc.) for comparison, allowing you to intuitively understand and compare the potential, entry difficulties, costs, and other decision-making elements among countries. We also provide concise and powerful opinions and references based on TMO Group's many years of experience in the Southeast Asian market and cross-border eCommerce.

From December 2022, TMO Group started publishing a series of outlooks on different industries in Southeast Asian eCommerce, analyzing sales performance in various countries. We've released outlooks on cosmetics, home appliances, health supplements and more, and will continue to explore more popular industries and categories !

If your company is interested in the sales data of specific industry categories in Southeast Asia (dimensions include country, platform, category, brand, store, SKU, etc.), please feel free to send an email to info@tmogroup.asia or call **021-6170-0396** to contact us for customized data or reports.

It is important to note that this report is intended for market reference purposes only, and our company does not bear any legal responsibility for the accuracy and viewpoints presented in the report.

TMO Services



Market Scan & Research

Conduct a preliminary scan of different markets, define the competitive landscape and select suitable markets for your cross-border eCommerce



Customized Industry Data

To help you understand the ever-changing consumer preferences and demand trends, as well as the evolving industry standards.



Market Entry & Development Strategy

Consolidate market potential and localization knowledge to formulate short-term, medium-term, or long-term market entry and development strategies for you.



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01. eCommerce in Southeast Asia

The State of eCommerce in Southeast Asia

Southeast Asia is one of the most important economic engines in the Asia-Pacific region. According to Euromonitor, by 2030, the economic growth of countries such as Indonesia, the Philippines, and Vietnam will be stronger than that of the entire Asia-Pacific region. The Southeast Asian eCommerce market has grown rapidly since the mid-2010s, and the COVID-19 pandemic has pushed it to an even higher stage. The *2024 Southeast Asia Digital Economy Report*, jointly released by Google, Temasek, and Bain & Company recently, shows that the **Southeast Asian e-commerce industry continued its growth momentum in 2024, with a Gross Merchandise Volume (GMV) of US\$159 billion, representing a 15% year-on-year increase.** Statista also predicts that by 2029, the Southeast Asian eCommerce market will reach about \$191.2 billion, with a compound annual growth rate of 10.42% from 2024 to 2029. This indicates that the Southeast Asian eCommerce market is bursting with infinite potential for development.

On June 2, 2023, with the formal accession of the Philippines, the Regional Comprehensive Economic Partnership (RCEP) was officially completed, promoting deeper cooperation between China and Southeast Asian countries. **Chinese eCommerce giants are also actively expanding into the Southeast Asian eCommerce market.** As of July 2023, Alibaba has injected over \$5.8 billion (approximately 41.6 billion RMB) into Lazada. ByteDance's **TikTok Shop has undoubtedly emerged as a rising star in the Southeast Asian market.** Driven by its dual-engine strategy of short videos and live streaming, its total GMV in Southeast Asia surpassed **US\$21 billion** in 2024, marking a **28.8%** year-on-year increase from 2023. ByteDance-owned **TikTok acquired a majority stake in Indonesia's e-commerce platform Tokopedia** in 2023. The merged entity now holds an estimated **28.4% market share** in Southeast Asia, surpassing Lazada to become the region's **second-largest e-commerce platform.**

However, entering this market is no an easy task. To capture the potential businesses in these countries need more market intelligence. What are the population, economic, and eCommerce market sizes? What are the top eCommerce platforms in this region? Which product categories are suitable for selling on Southeast Asian platforms? What are the requirements for foreign direct investment and foreign legal entities in the region? What should be considered regarding local tariffs, product certification, and logistics? **This market outlook will fill that gap, using market data to provide you with essential information.**

Population, Economy & eCommerce

Thailand

Population: 71.60 million
GDP: 545.34 billion USD
GDP per Capita: 7,750 USD
2024 eCommerce Revenue(Estimates): 22.84 billion USD
eCommerce Revenue YoY Growth: +16.95%

Indonesia

Population: 285 million
GDP: 1,490 billion USD
GDP per Capita: 5,250 USD
2024 eCommerce Revenue(Estimates): 56.81 billion USD
eCommerce Revenue YoY Growth: +12.47%

Vietnam

Population: 101million
GDP: 506.43 billion USD
GDP per Capita: 4,990 USD
2024 eCommerce Revenue(Estimates): 16.13 billion USD
eCommerce Revenue YoY Growth: +15.05%

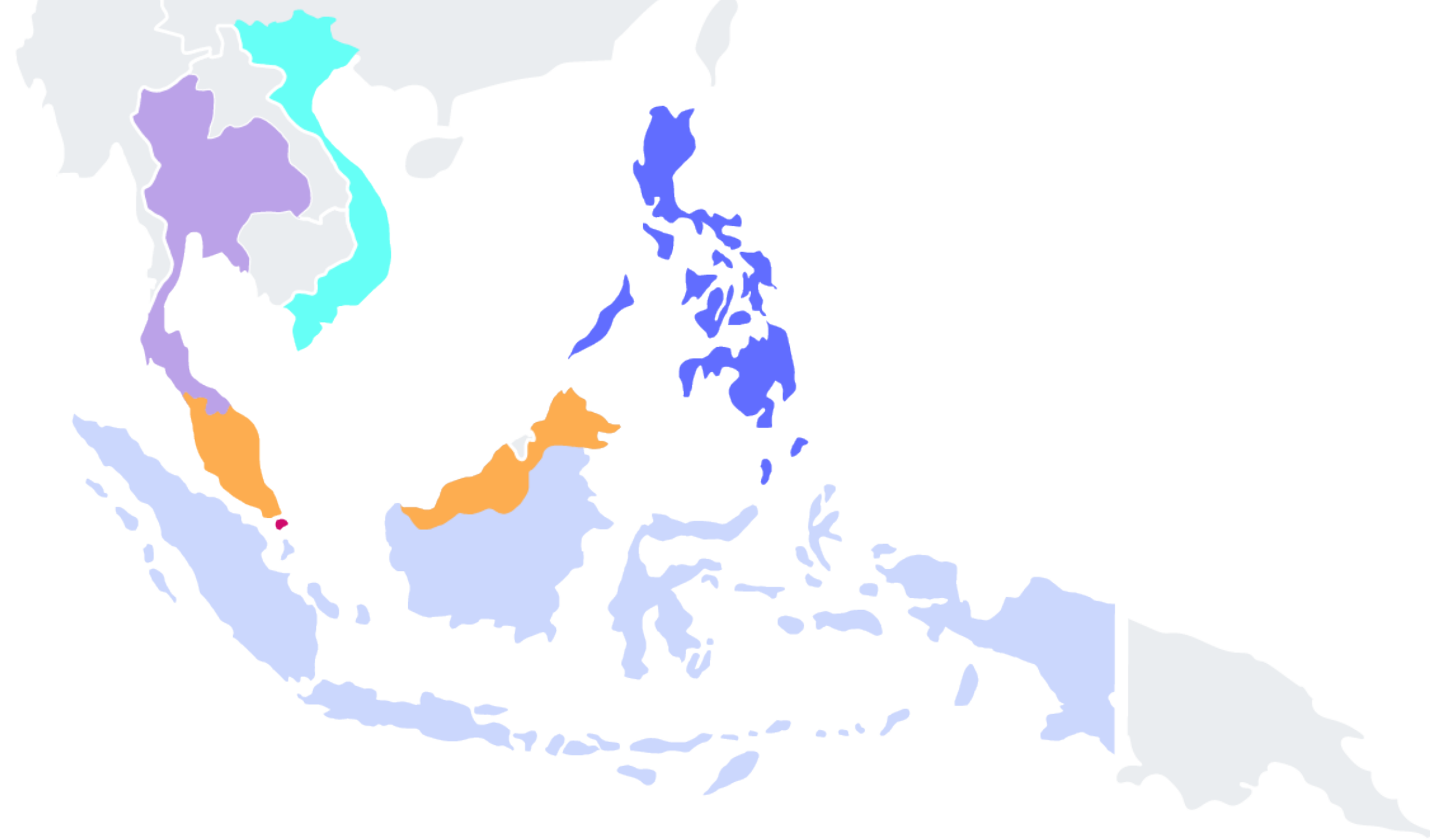
Philippines

Population: 116 million
GDP: 507.67 billion USD
GDP per Capita: 4,440 USD
2024 eCommerce Revenue(Estimates): 16.75 billion USD
eCommerce Revenue YoY Growth: +12.64%

Malaysia

Population: 35.80 million
GDP: 488.25 billion USD
GDP per Capita: 14,420 USD
2024 eCommerce Revenue(Estimates): 8.95 billion USD
eCommerce Revenue YoY Growth: +10.63%

eCommerce Consumer Preferences



TMO Observations:

- In 2024, electronics were the best-selling category across 3 out of 5 Southeast Asian countries. Categories such as Fashion, Food and Beauty & Personal Care were also popular among consumers.
- In terms of monthly visits from various eCommerce platforms, **Shopee held the highest traffic in Southeast Asia, ranking first in monthly visits across all five countries.**
- This ranking only involved multi-vendor marketplaces that have a dedicated website in the country, so **TikTok Shop (app-only operations) is excluded from rankings.** Thailand and Indonesia were its top two markets as of April 2025.

Indonesia



Top 3 eCommerce Platforms by monthly visits(Web):

Shopee (Monthly Visits: 133.1M)
Tokopedia (Monthly Visits: 71.68M)
Lazada (Monthly Visits: 21.53M)

Most popular product categories:

- Food
- Electronics
- Fashion

Thailand



Top 3 eCommerce Platforms by monthly visits(Web):

Shopee (Monthly Visits: 114.8M)
Lazada (Monthly Visits: 39.94M)
Kaidee (Monthly Visits: 1.58M)

Most popular product categories:

- Beauty & Personal Care
- Food
- Electronics

Philippines



Top 3 eCommerce Platforms by monthly visits(Web):

Shopee (Monthly Visits: 69.13M)
Lazada (Monthly Visits: 19.91M)
Carousell PH (Monthly Visits: 2.59M)

Top 3 eCommerce Platforms by monthly visits(Web)

Source: SimilarWeb 2024.12

Most popular product categories ranked by the annual spend in each consumer goods eCommerce category

Source: DataReportal 2025

Malaysia



Top 3 eCommerce Platforms by monthly visits(Web):

Shopee (Monthly Visits: 56.18M)
Lazada (Monthly Visits: 11.58M)
Mudah (Monthly Visits: 6.29M)

Most popular product categories:

- Electronics
- Fashion
- Beauty & Personal Care

Vietnam



Top 3 eCommerce Platforms by monthly visits(Web):

Shopee (Monthly Visits: 172.6M)
Lazada (Monthly Visits: 18.48M)
Tiki.vn (Monthly Visits: 5.01M)

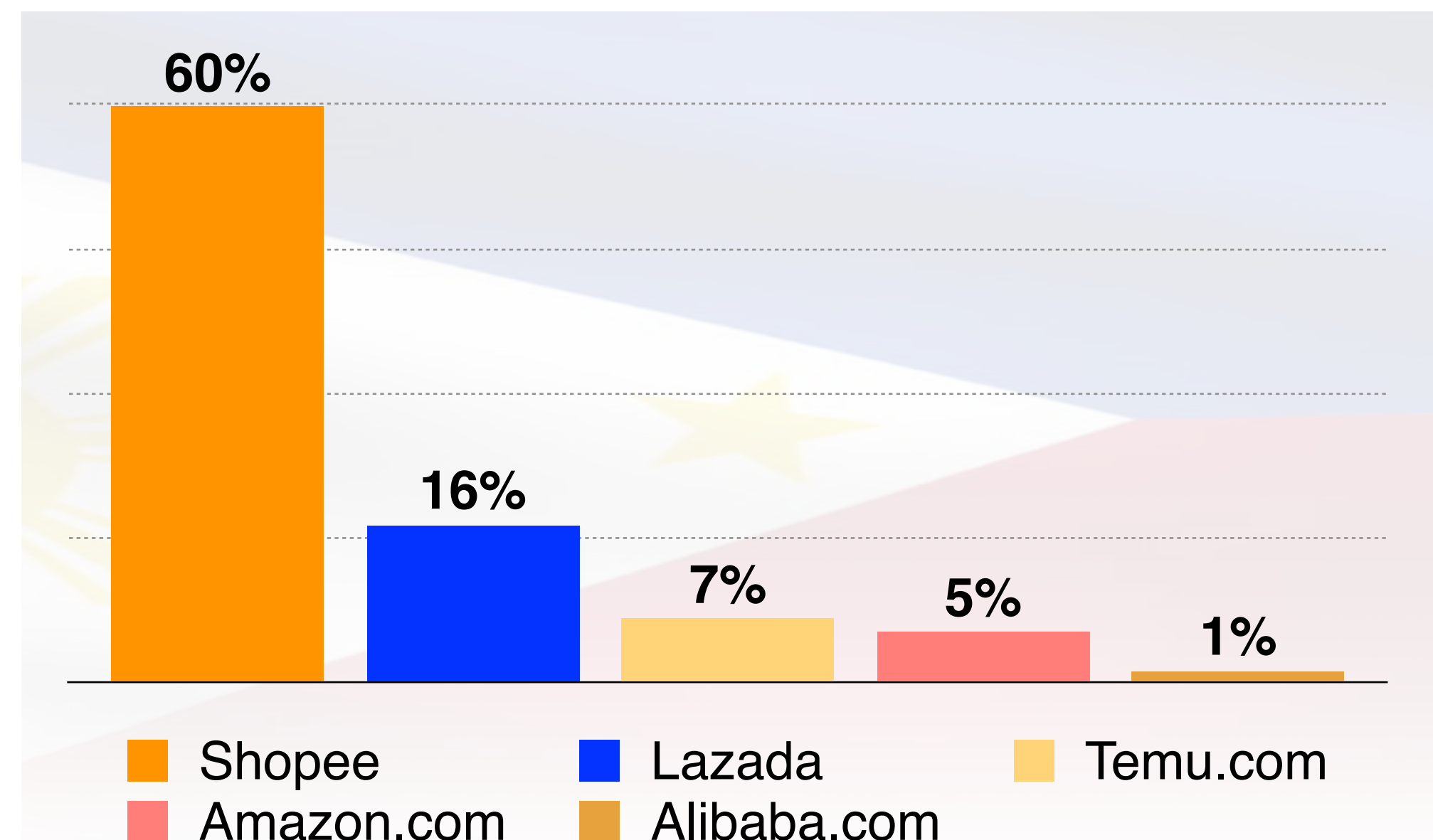
Most popular product categories:

- Electronics
- Fashion
- Food

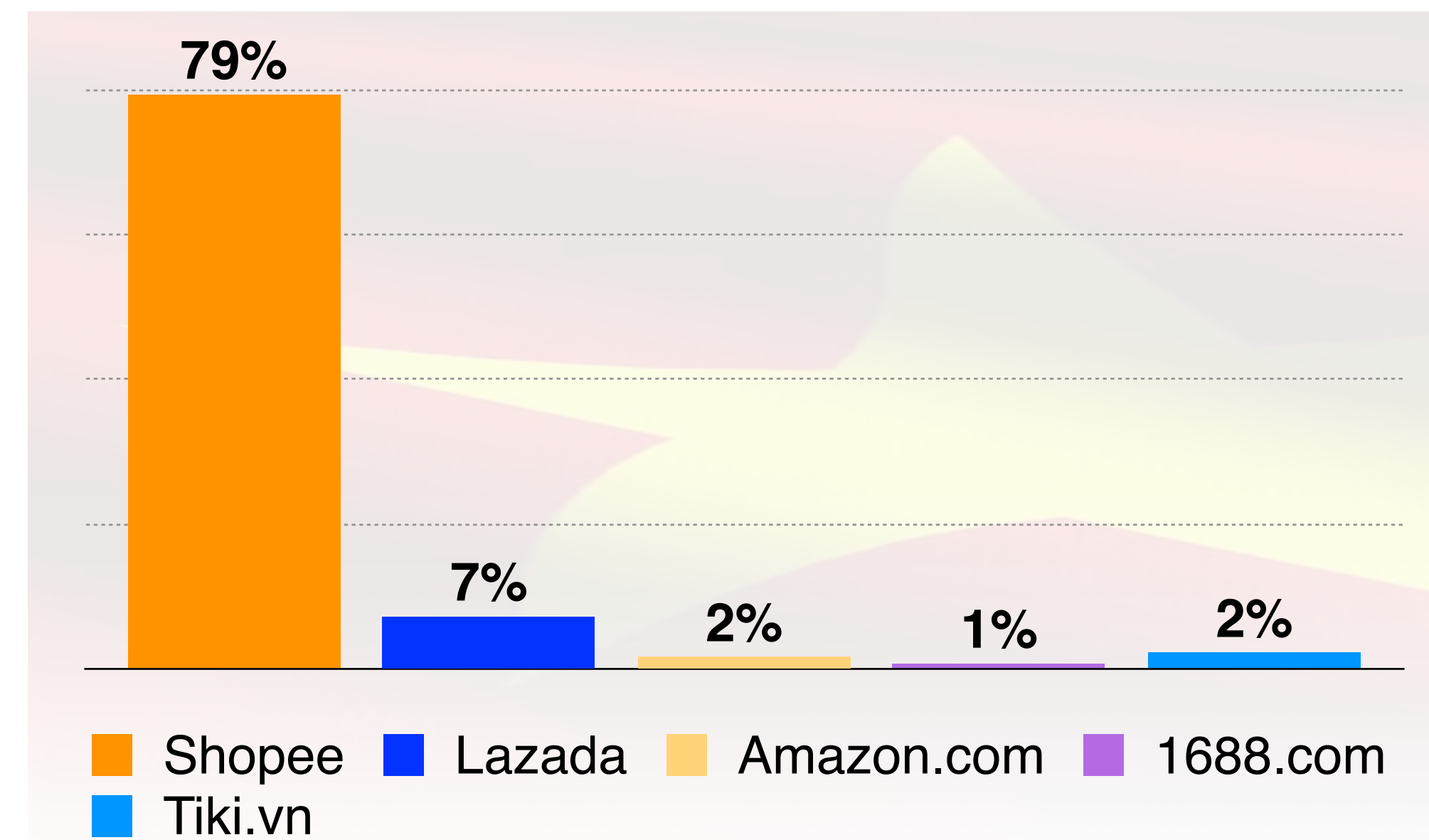
Most popular product categories:

- Electronics
- Food
- Beauty & Personal Care

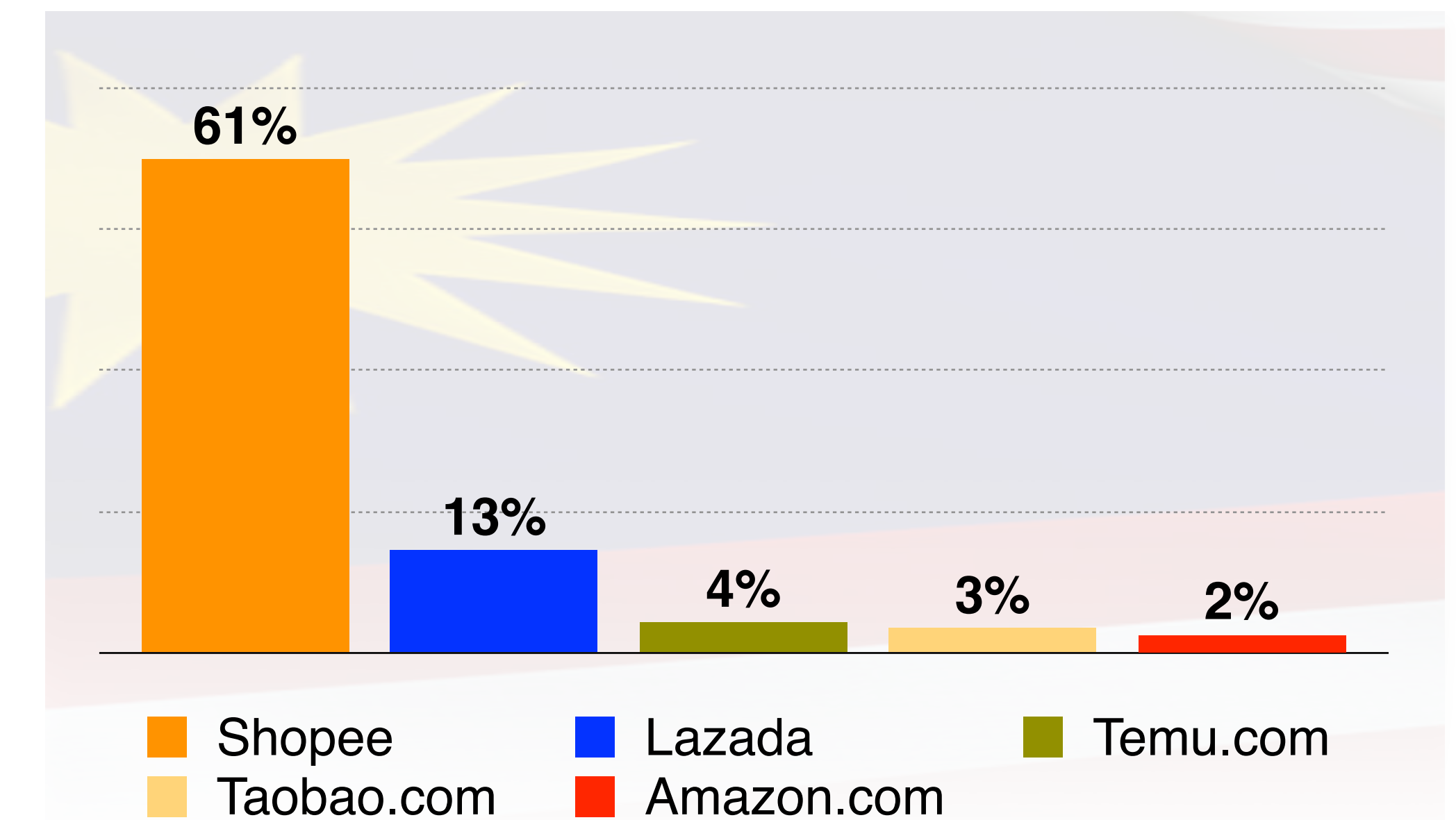
Top SEA eCommerce Platform (Ranked by Traffic Share)



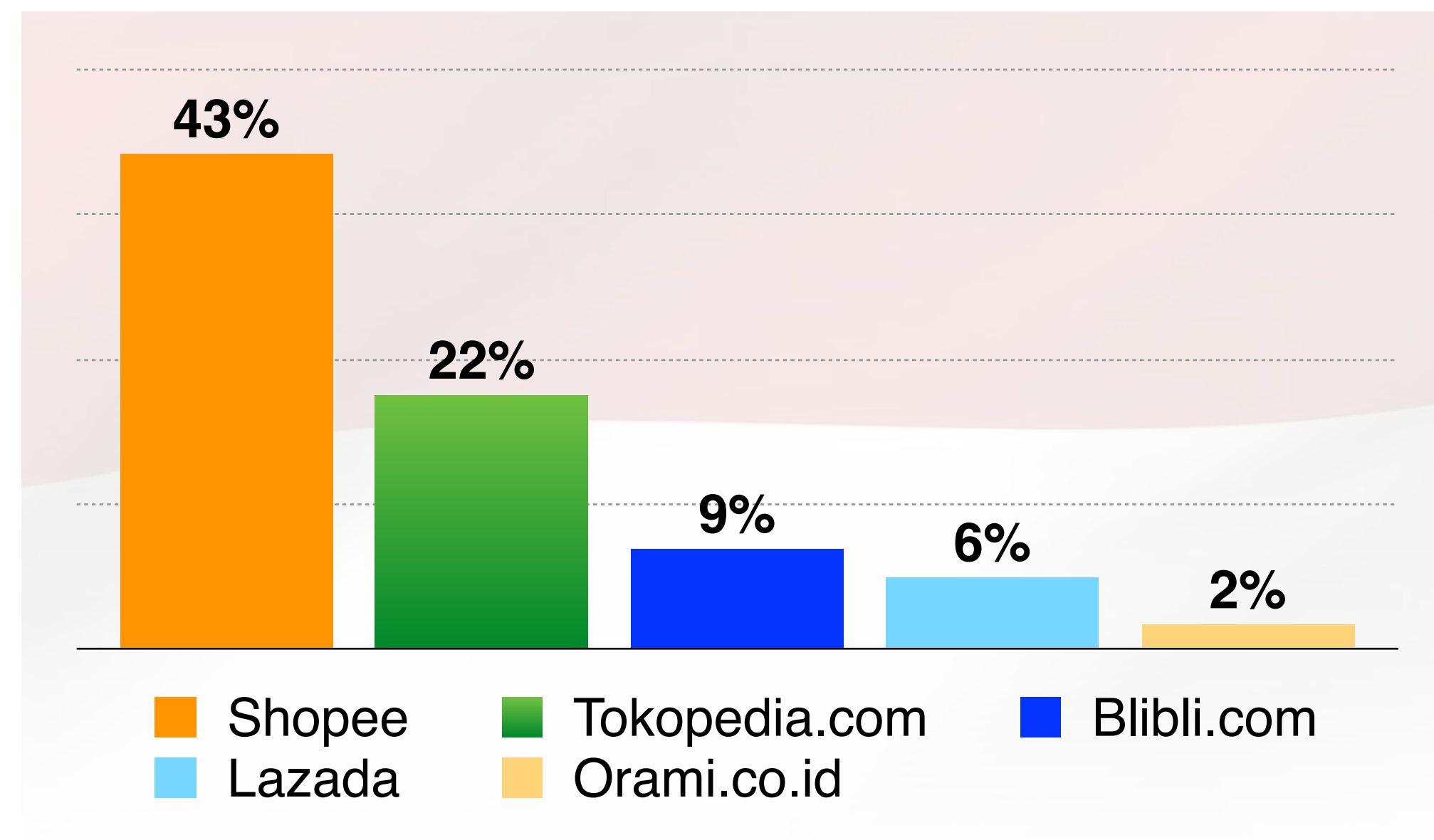
Philippines



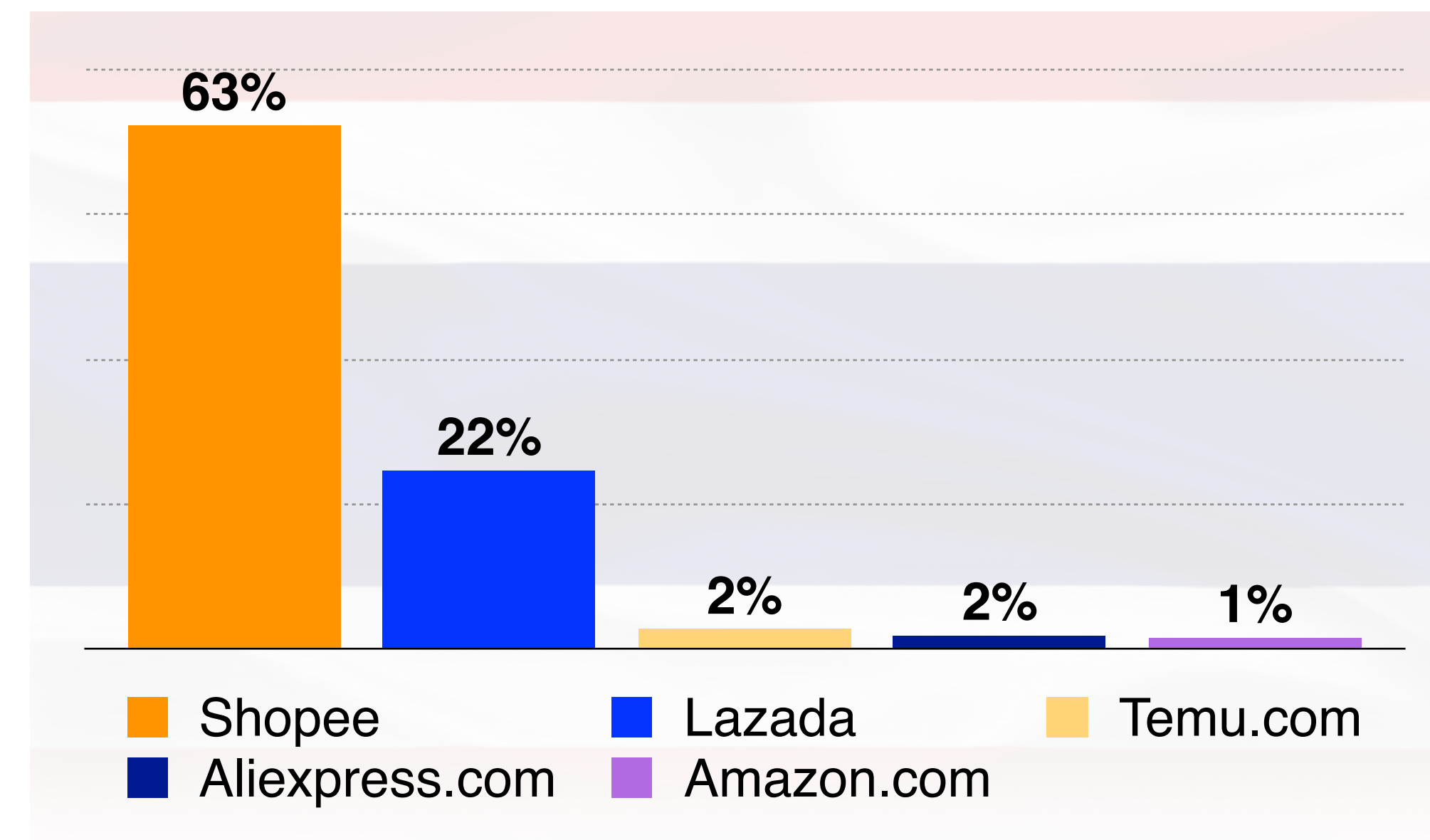
Vietnam



Malaysia



Indonesia



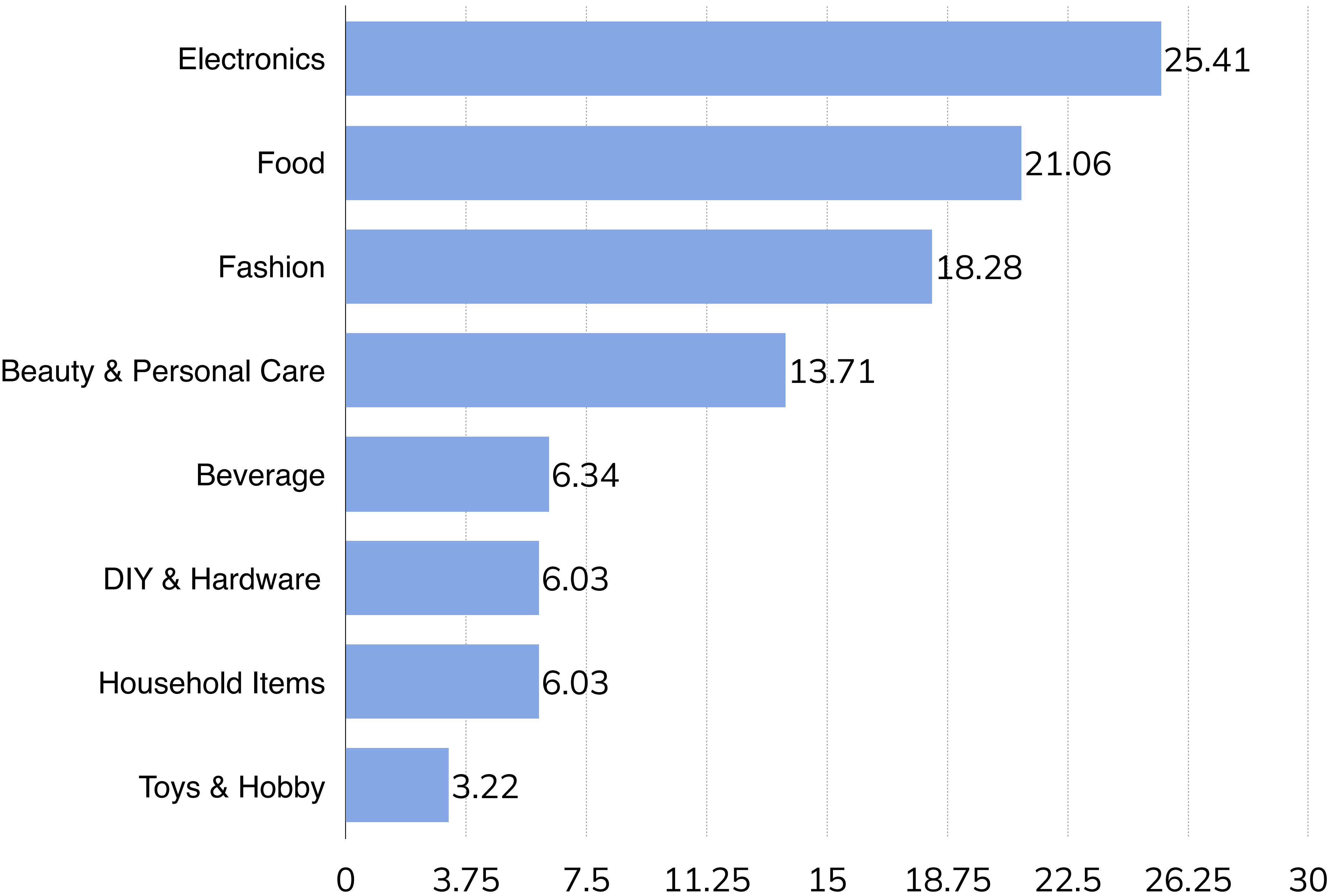
Thailand

TMO Observations:

- Shopee and Lazada all hold the top two positions in terms of traffic in Thailand, Vietnam, Malaysia, and the Philippines.
- The eCommerce platform landscape in Indonesia is notably more competitive. **Tokopedia**, owned by TikTok, has surged to second place with over 60 million monthly visits.
- TikTok Shop (app-based) is excluded from this ranking, but its 2024 GMV surpassed \$21B in SEA. Post-Tokopedia merger, it ranks second with 28.1% market share. Details follow in later sections.

Most Popular Product Categories in SEA eCommerce

2024 Product Category Revenue in SEA eCommerce (in billion USD)





02. Consumers, Marketing & Social Media

Southeast Asian Consumers, Marketing & Social Media

Southeast Asia is home to one of the largest populations of mobile device and social media users in the world. Mobile devices, in particular, **have achieved an absolute foothold**, with penetration rates of that in all five countries approaching or exceeding 100%. This indicates that **many people may own more than one mobile device**.

Even in countries where internet penetration is relatively low, individuals still spend nearly ten hours per day on average using the internet.

In the field of digital marketing, spending of digital marketing is on the rise across five Southeast Asian countries. Expenditure on social media advertising is growing rapidly, which gradually becomes the main battleground for digital marketing. **In Malaysia, Indonesia, and Thailand, social media marketing accounts for the largest share of digital marketing budgets.** Especially In Malaysia and Indonesia, social media marketing expenditures make up more than 30% of total digital marketing spending.

Additionally, Key Opinion Leaders (KOLs) are highly popular within Southeast Asia's mobile internet ecosystem. Leveraging the influence of local KOLs could significantly increase brand awareness and win consumer trust.

Netizen Behavior and Consumer Profile

TMO Observations:

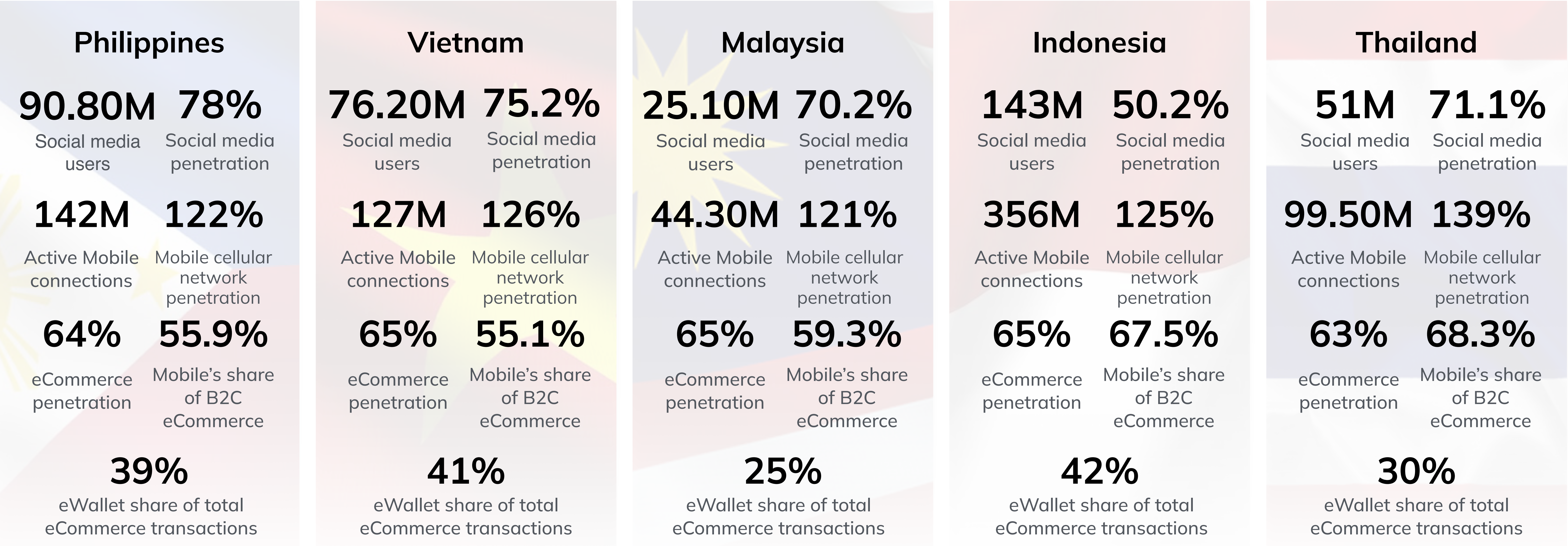
- In 2024, the total number of internet users in the five Southeast Asian countries reached 480 million. Indonesia led with approximately 212 million internet users, making it the country with the largest number of netizens.
- In terms of internet penetration rate, although **Malaysia** had a relatively smaller number of internet users, it has a **high penetration rate (nearly 98%)**, indicating its potential in the eCommerce market. In the Southeast Asian market, Western, Japanese, and Korean brands received significant popularity due to their high international reputation. However, Chinese brands are making their mark on categories such as electronics and accessories, as well as smart home appliances. Brands like Xiaomi, Oppo, and TCL from China frequently entered the best-selling product lists, especially in Thailand and Malaysia.

Philippines	Vietnam	Malaysia	Indonesia	Thailand
97.50M 83.8%	78.90M 78.8%	34.90M 97.4%	212M 74.6%	65.40M 91.2%
Internet Users Internet Penetration	Internet Users Internet Penetration	Internet Users Internet Penetration	Internet Users Internet Penetration	Internet Users Internet Penetration
8h52m 57.1%	6h5m 60.6%	8h13m 62.9%	7h22m 58%	7h54m 69.2%
Average daily online time eCommerce Penetration	Average daily online time eCommerce Penetration	Average daily online time eCommerce Penetration	Average daily online time eCommerce Penetration	Average daily online time eCommerce Penetration
<ul style="list-style-type: none">• High acceptance of foreign brands• Strong interest in products not available locally• Emphasis on product practicality, with a preference for moderately priced or inexpensive items	<ul style="list-style-type: none">• Preference for Western brands• High price sensitivity• Increased focus on health and fitness foods after pandemic• Free delivery and promotional activities could be key factors influencing consumer purchases	<ul style="list-style-type: none">• Strong purchasing power• Pay more attention to brand reputation, with high acceptance of Chinese brands• High price sensitivity• Preference for promotional activities	<ul style="list-style-type: none">• Passionate about promotional activities• Prefers international brands for 3C products• Male-oriented categories gain increasing popularity• Enthusiastic about purchasing products on social media platforms	<ul style="list-style-type: none">• High brand loyalty, prefer international brands• Chinese brands gain popularity• Prefer cross-border goods• Older age groups have lower frequency of consumption but higher spending• Strong interest in shopping on social media

Social Media & Marketing Usage

TMO Observations:

- Apart from Indonesia, the social media penetration rates in the other four Southeast Asian countries are close to or exceed 70%, with the Philippines having the highest social media penetration rate at 78%.
- The mobile eCommerce penetration rates in all five Southeast Asian countries hovered around 65%. Lightweight smartphones have become the primary device for online shopping. Mobile eCommerce offers consumers the convenience of shopping from anywhere at any time, and without the need to visit a physical store or use a desktop computer.



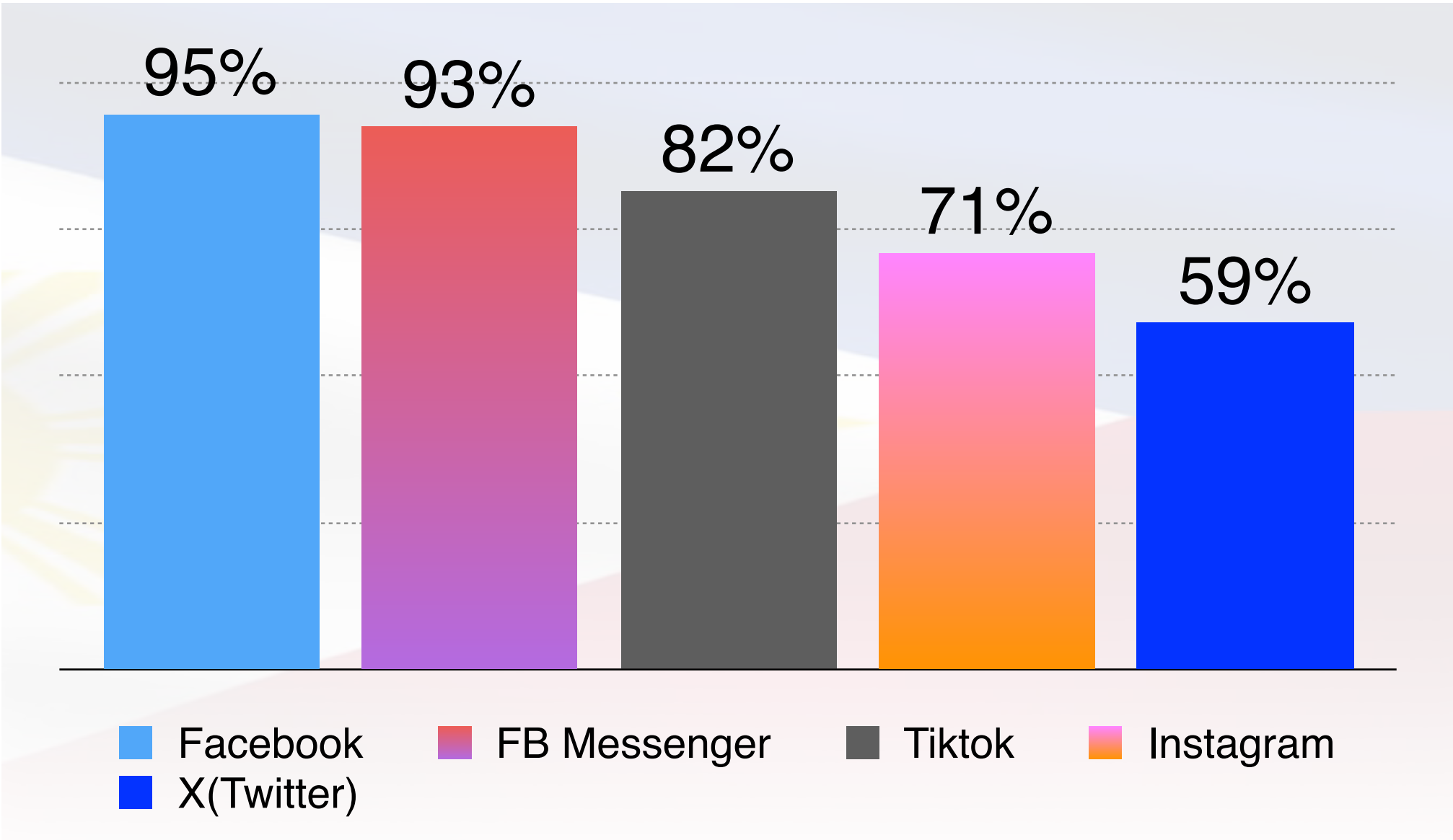
eCommerce Marketing

TMO Observations:

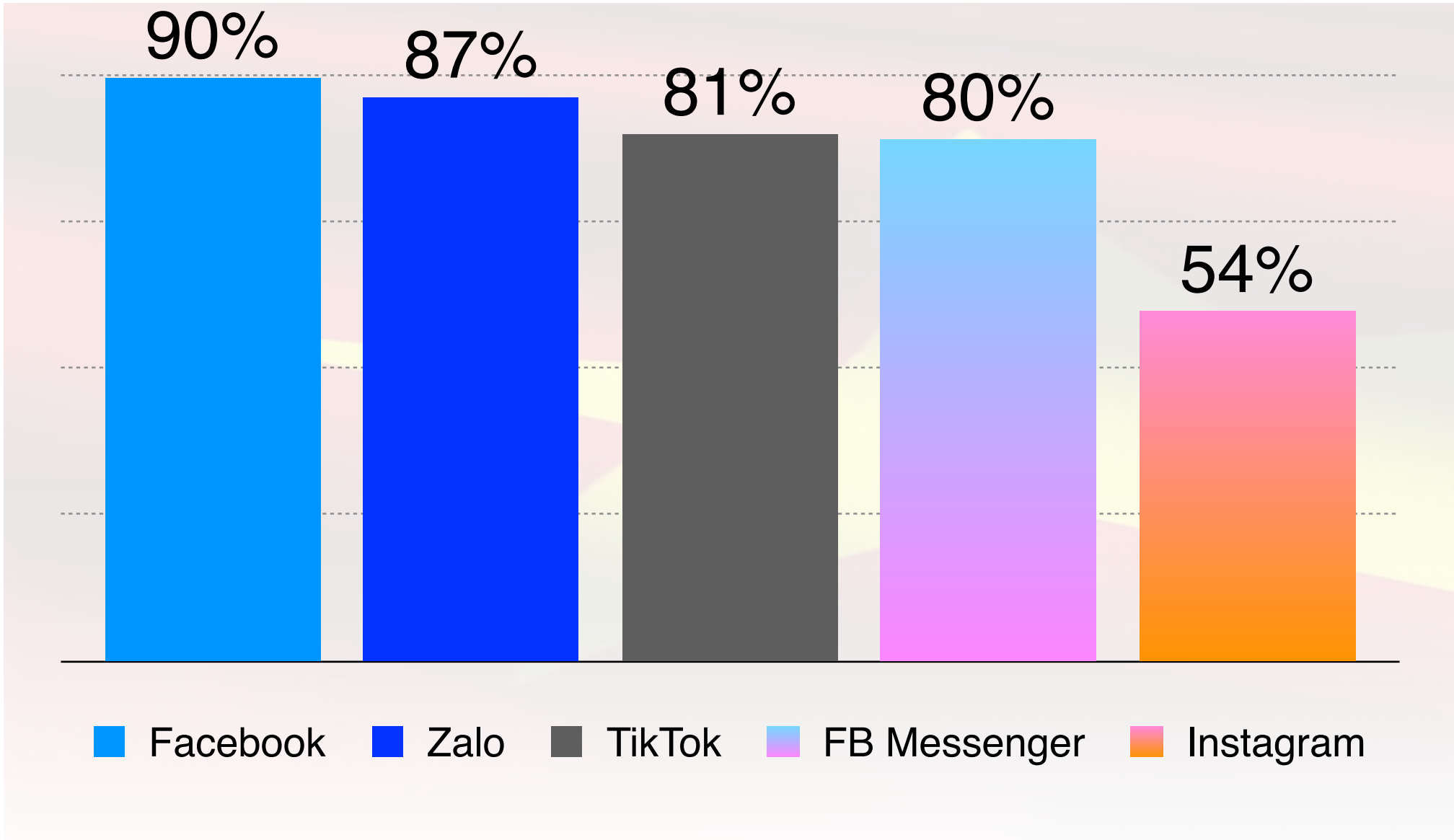
- In 2024, the year-on-year growth rate of digital marketing expenditure in the five Southeast Asian countries was around 10%. **Vietnam was the fastest-growing country (11.3%).**
- Southeast Asian countries place a high emphasis on social media, **with Indonesia, Malaysia and Thailand allocating a significant portion of their digital marketing budget to social media**, Data indicates growing corporate investment in social media promotion across Southeast Asia.
- Global promotional shopping activities are effective in most regions (such as New Year promotions, Double 11 etc.). Additionally, Ramadan could be one of the most important festivals in countries like Malaysia and Indonesia, which have large Muslim populations. **During Ramadan, Muslims reunite with family, exchange gifts with friends and relatives, which can lead to a significant increase in consumer demand.** As a result, Ramadan is undoubtedly a golden marketing opportunity for businesses to reach Muslim populations. To boost business growth and brand awareness, it is crucial to understand deeply of the product categories that Southeast Asian consumers are interested in during Ramadan.

Philippines	Vietnam	Malaysia	Indonesia	Thailand
2024 Digital Marketing Spend (in Millions USD)	2024 Digital Marketing Spend (in Millions USD)	2024 Digital Marketing Spend (in Millions USD)	2024 Digital Marketing Spend (in Millions USD)	2024 Digital Marketing Spend (in Millions USD)
1,950 +10.3%	1,430 +11.3%	1,190 +9.1%	3,370 +9.7%	2,050 +10%
Total	Total	Total	Total	Total
667	572	314	1,130	489
Search Ads	Search Ads	Search Ads	Search Ads	Search Ads
590	398	412	1,240	590
Social Media Ads	Social Media Ads	Social Media Ads	Social Media Ads	Social Media Ads
458	370	389	879	447
Banner Ads	Banner Ads	Banner Ads	Banner Ads	Banner Ads
364	256	195	758	557
Video Ads	Video Ads	Video Ads	Video Ads	Video Ads
Important Shopping Holidays	Important Shopping Holidays	Important Shopping Holidays	Important Shopping Holidays	Important Shopping Holidays
<ul style="list-style-type: none">• Easter in April• Mother's Day in May• Double 11 in November• Black Friday	<ul style="list-style-type: none">• New Year promotion in January• Valentine's Day in February• Mother's Day in May• Double 11 in November	<ul style="list-style-type: none">• New Year promotion in January• The month of Ramadan in March to April• Mother's Day in May• Double 11 in November• Black Friday	<ul style="list-style-type: none">• The month of Ramadan in March to April• Mid-June promotion• Indonesian National Day• Double 11 in November• Christmas	<ul style="list-style-type: none">• New Year promotion in January• Water Festival in April• Labor Day in May• Double 11 in November

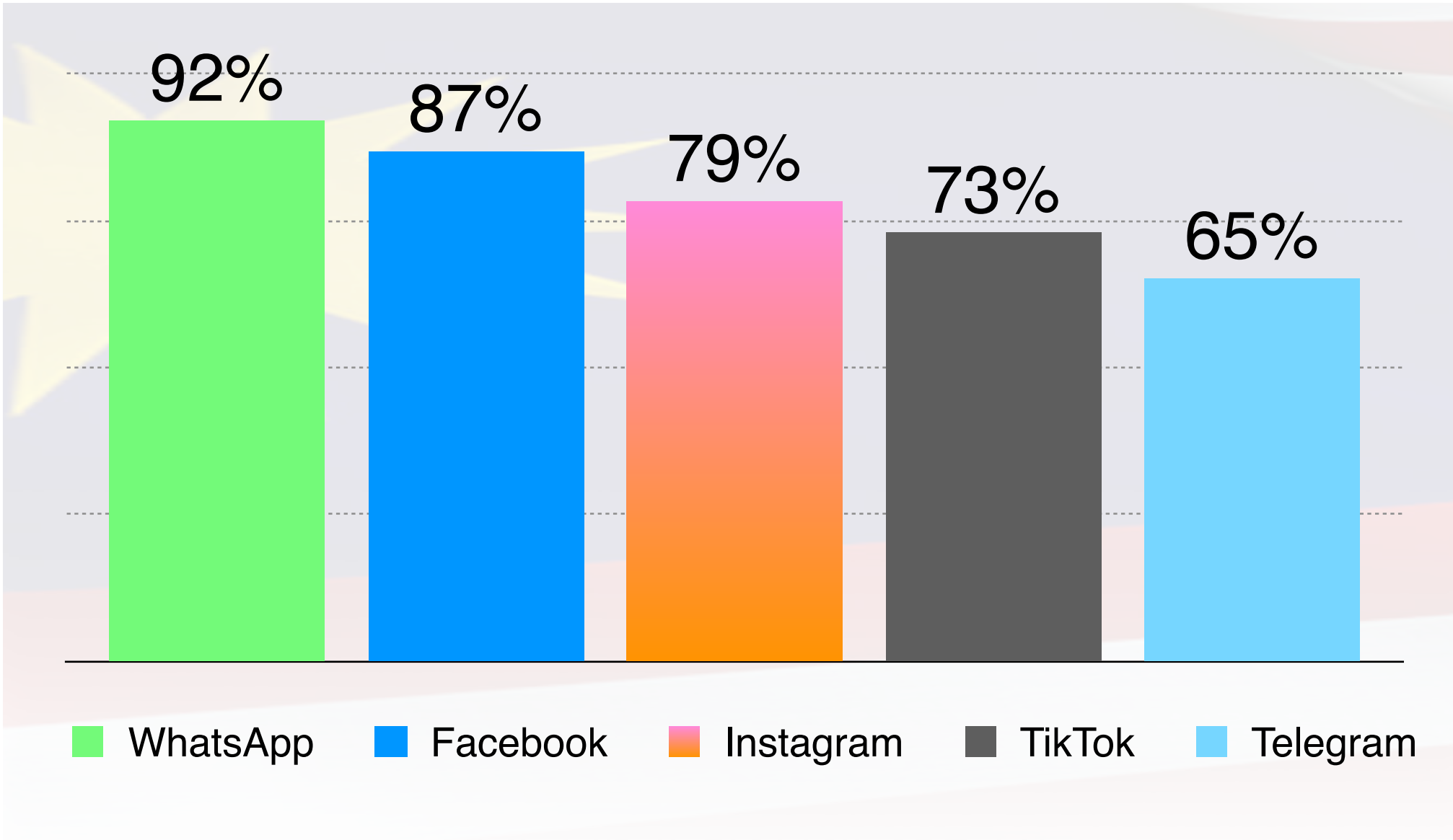
Most Used Social Media Platforms By Country



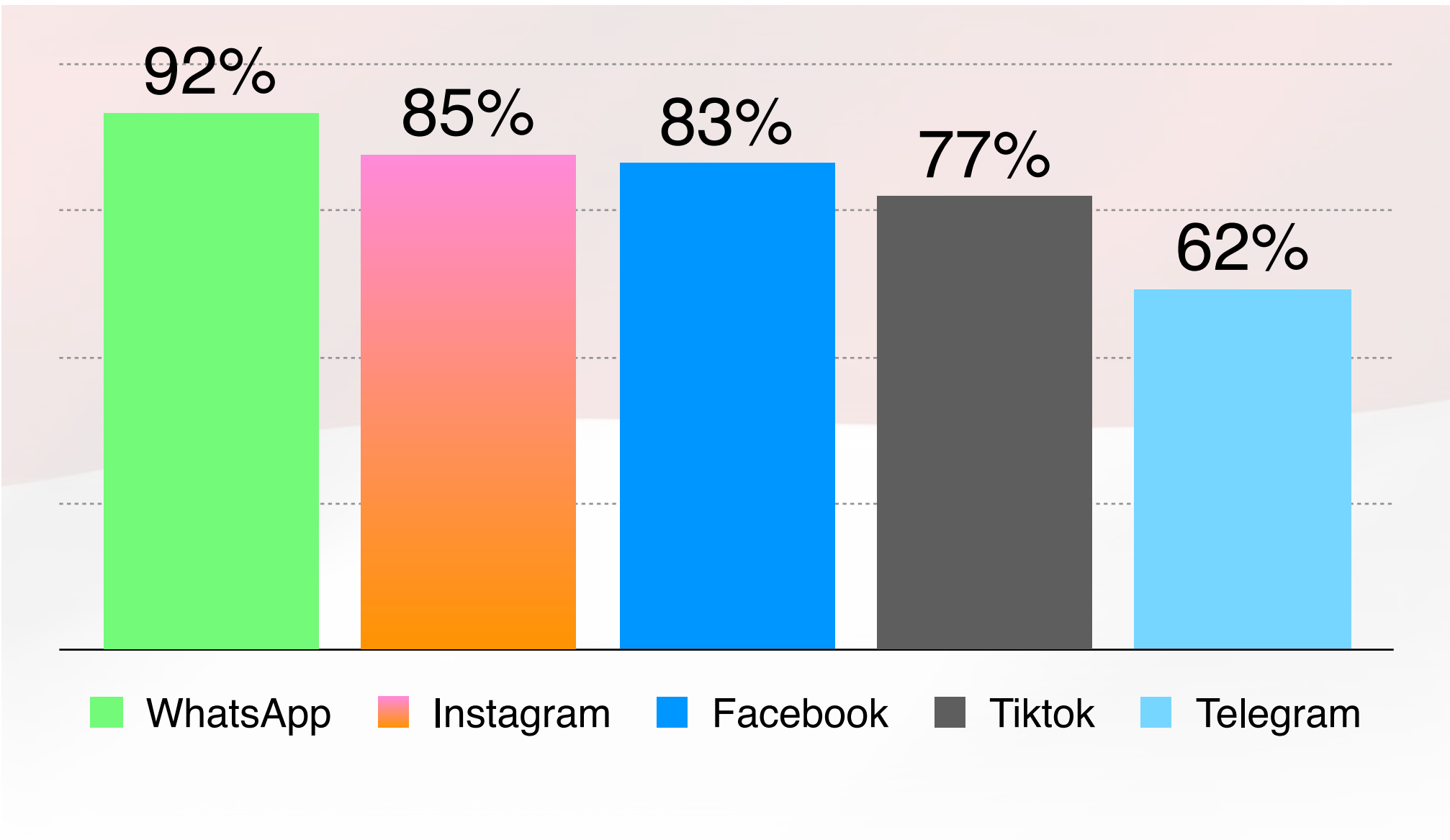
Philippines



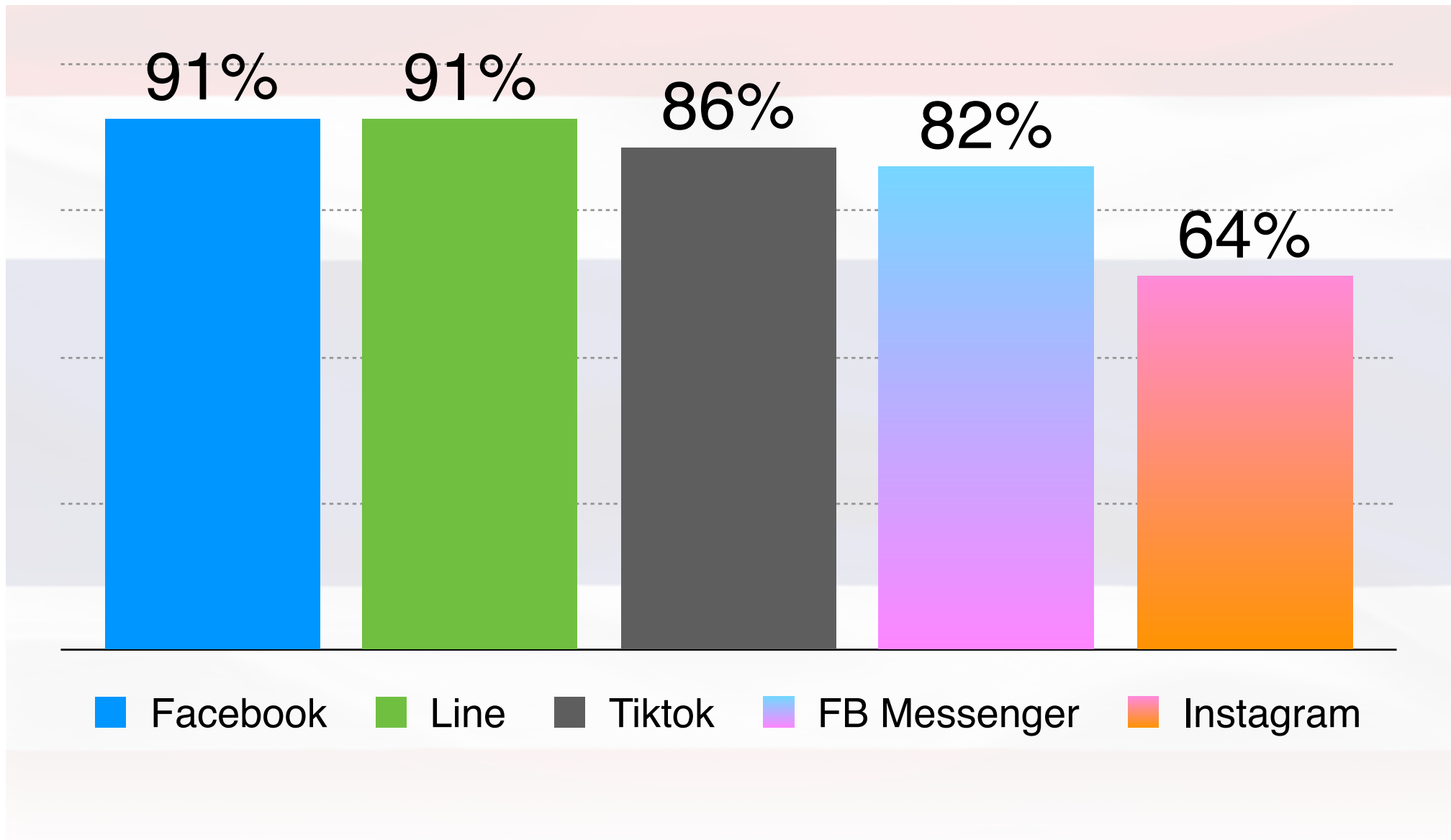
Vietnam



Malaysia



Indonesia



Thailand

TMO Observations:

- Facebook, TikTok and Instagram have all made it into the top 5 social media platforms in each of the five Southeast Asian countries.
- Vietnam is the only country among the five Southeast Asian countries that has influential local social media.

Key Opinion Leaders (KOLs) and Live-streaming

The eCommerce and social media industries in Southeast Asia are undergoing rapid transformation, particularly in live-streaming selling. **Indonesia and Thailand are at the forefront of this trend, with high consumer engagement in live-stream shopping.**

Social media platforms like YouTube, WhatsApp, Instagram, and Facebook play a significant role across the region. TikTok is rapidly gaining attention in Southeast Asia as well. **For businesses considering leveraging Key Opinion Leaders (KOLs) for marketing, Facebook, TikTok, and YouTube are crucial platforms in Southeast Asia, covering 96% of online users in the region.**

Specifically, TikTok's Spark ads, coupled with the influence of KOLs, offer abundant opportunities for improving sales revenue. However, their strength lies in localizing content for specific cultures. Traditional metrics may not fully capture this impact, indicating the need for more nuanced evaluation methods for a true ROI assessment.

TMO Observations:

- Key Opinion Leaders (KOLs) are highly correlated with both the country and platform. The influence and expertise of KOLs vary across different countries and platforms.
- Before selecting KOLs to collaborate with, brands need to conduct in-depth research on the top-ranking KOLs in the target country and platform, as well as their audience demographics.

TOP 3 KOLs in Tik Tok



Vietnam: Tiền ít hít đồ thơm; Cà rì viú; Lương Văn Tuấn onglocute



Philippines: Moto Math; Beauty Momshie; lixartiktokshop





Indonesia: iniaccountwawa; MARLOVofficial; Adityalkmn



Malaysia: Cik Ngigau; mommy shop; Usha 93



Thailand: รีวิวทุกอย่างที่ใช้; ส้ม นฐา; อายจำ.ตาม รีวิว



03. Legal Requirements, Importing, and Cross-Border eCommerce

Legal Realities of Selling to Southeast Asia

Southeast Asia is a **richly diverse region**, and the legal frameworks of each country reflect this diversity. For companies aiming to expand their business in Southeast Asia, understanding the legal environment of each country is a prerequisite for entering the Southeast Asian market.

While there are commonalities (such as **ASEAN membership** and certain provisions for trade among member countries), there are significant differences in regulations regarding what is permissible and impermissible, as well as requirements for special permits or filings.

Fortunately, **the cost of exporting most goods** to the above-mentioned countries **is reasonable**. Apart from certain product categories (such as luxury cars), there is little need to worry about tax rates. **The relatively low entry costs remain one of the main attractions of the Southeast Asian market.**

FDI & Foreign-Owned Domestic Legal Entities



TMO Observations:

- Thailand and Indonesia have much **stricter requirements** for setting up legal entities, making them better suited for cross-border market entry. **Vietnam and the Philippines, meanwhile, are relatively welcoming to foreign businesses.**



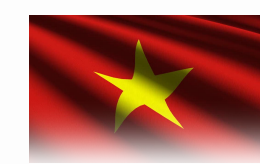
Philippines Economic Freedom Index: 82nd in world

- 100% FDI allowed for eCommerce with a minimum equity of 200,000 USD (or 100,000 USD with 50+ direct employees)
- Can sell cross-border without legal entity
- Lazada and Shopee support cross-border from a limited range of countries
- Import license requires legal entity



Indonesia Economic Freedom Index: 60th in world

- 100% FDI in eCommerce permitted with investments of around \$7 million USD or businesses that create 1,000+ Indonesian jobs. Otherwise, only up to 49% is permitted
- Can sell cross-border without legal entity
- Lazada allows sellers from specific countries to engage in cross-border sales



Vietnam Economic Freedom Index: 61st in world

- Generally, Vietnam permits foreign direct investment (FDI) with foreign ownership reaching up to 100% in most cases.
- Can sell cross-border without legal entity
- Lazada allows sellers from specific countries to engage in cross-border sales



Thailand Economic Freedom Index: 84th in world

- 100% FDI permitted in eCommerce If applied for and got a foreign business license.
- Can sell cross-border without legal entity
- Lazada and Shopee support cross-border from a limited range of countries



Malaysia Economic Freedom Index: 44th in world

- Private Limited Company (Sdn Bhd) allows 100% foreign ownership
- Can sell cross-border without legal entity
- Lazada and Shopee support cross-border from a limited range of countries

Import Tax, Product Certification & Logistics

TMO Observations:

- Every country has specific restrictions, generally on hazardous substances and some key products produced at scale in the country. It is therefore worth checking each country's policies in this area.
- **The logistics cost-to-GDP ratio indicates the percentage of a country's overall economic activity that is spent on logistics.** A higher ratio suggests that the country spends more on logistics, while a lower ratio indicates that the country has more efficient logistics. From the perspective of logistics costs, the Philippines, with its numerous islands, is more affected by geographical factors in logistics transportation, resulting in relatively higher logistics costs among the five countries. **The two countries with the lowest logistics costs are Malaysia and Thailand, making them suitable for cross-border merchants to enter.**



Philippines

Import tax: 0-30%
VAT: 12%

Product certification: Required for certain regulated goods (electronics, construction materials, chemicals, etc)

Leading logistics providers:

- LEL Express
- J&T Express
- NinjaVan
- Lalamove

Average delivery time: 3-8 days

The logistics cost-to-GDP ratio: 27%



Indonesia

Import tax: 0-150%
VAT: 11%

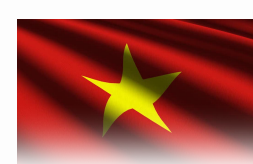
Product certification: Required for certain regulated goods (tires, fertilizers, cement, water pumps, etc)

Leading logistics providers:

- TIKI
- Lion Parcel
- JNE
- J&T Express

Average delivery time: 3.8 days

The logistics cost-to-GDP ratio: 22%



Vietnam

Import tax: 0-40%
VAT: 8%

Product certification: Required for certain regulated goods (toys, electronics, fuels, etc)

Leading logistics providers:

- Vietnam Post
- DHL
- GHN

Average delivery time: 5.6 days

The logistics cost-to-GDP ratio: 17%



Thailand

Import tax: 0-80%
VAT: 7%

Product certification: Required for certain regulated goods (electronics, cement, medical items, etc)

Leading logistics providers:

- TNT
- DHL
- Kerry Express Thailand
- Thailand Post

Average delivery time: 2.5 days

The logistics cost-to-GDP ratio: 15%



Malaysia

Import tax: 0-60%
SST: Sales tax 10%+
Service tax: 6%

Product certification: Required for certain regulated goods (batteries, toys, electronics, etc)

Leading logistics providers:

- DHL
- GDEX
- J&T Malaysia
- Malaysia Post

Average delivery time: 5.6 days

The logistics cost-to-GDP ratio: 14%

**The tax rate is based on the average tax rate or usual range. Source: pwc, the Ministry of Commerce of China*

*** Average delivery time taken from 2019 iPrice study*

****The logistics cost-to-GDP ratio data is sourced from Modern Logistics Magazine, the China Council for the Promotion of International Trade, and the Ministry of Commerce of the People's Republic of China.*

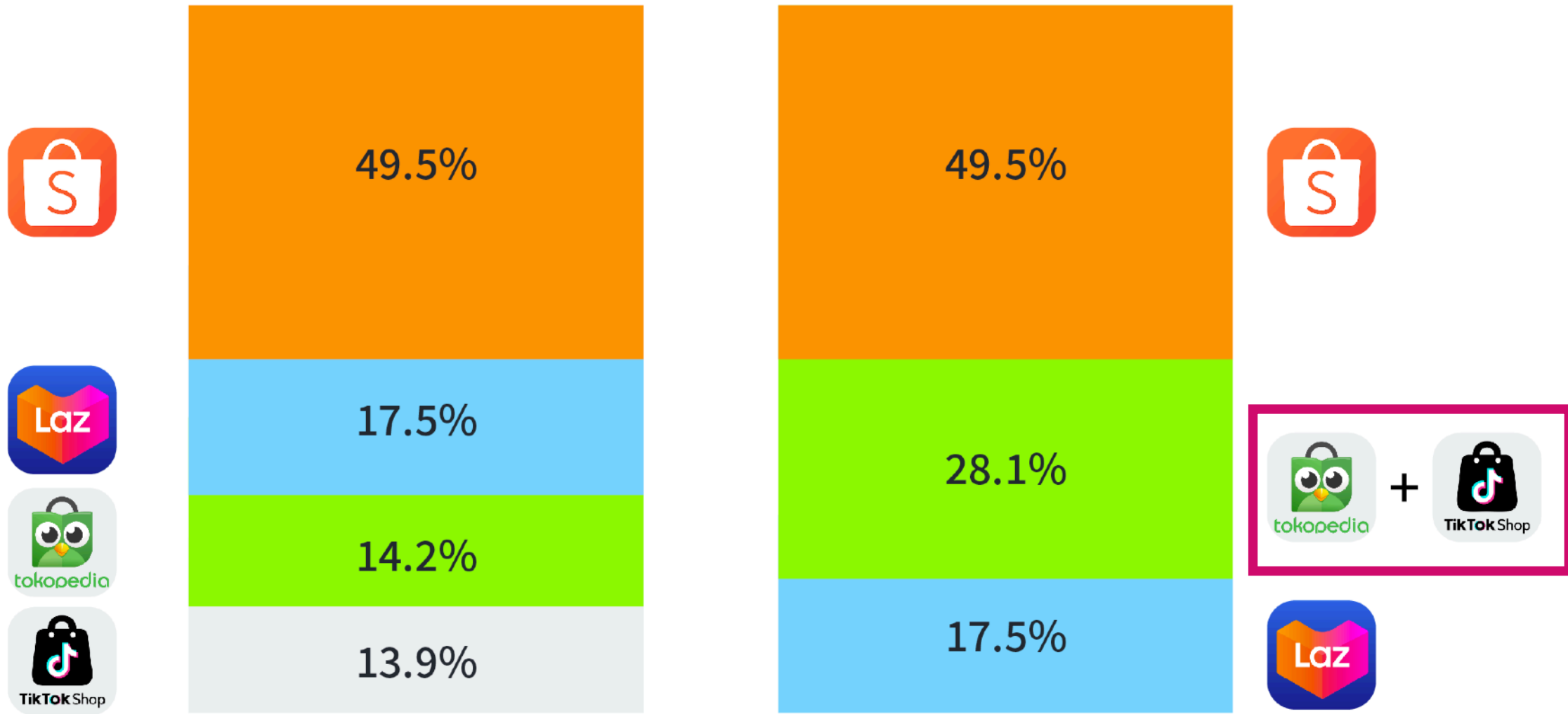
04. New trends in eCommerce landscape: Tokopedia, TEMU, TikTok Shop

Newcomers like Tik Tok Shop and TEMU show great impacts on the eCommerce landscape in Southeast Asia

In December 2023, TikTok announced a strategic partnership with Indonesia’s GoTo Group, regaining access to the Indonesian market by acquiring a 75% controlling stake in local platform Tokopedia. By 2024, this collaboration had achieved significant milestones. During the 12.12 Shopping Festival, Tokopedia leveraged TikTok’s live-streaming feature to ride the social commerce wave, with transaction volume surging nearly 50-fold within the first peak hour compared to daily averages. The strong performance drove Tokopedia’s Q4 2024 e-commerce service fees to **IDR 204 billion** for GoTo, contributing to full-year revenues of **IDR 690 billion**.

According to a report by Momentum Works, Shopee held a market share of 45.9% in the Southeast Asian eCommerce platform market in 2023. Before the merger of TikTok and Tokopedia, Shopee had a significant advantage over its closest competitors Lazada (17.5%), Tokopedia (14.2%), and TikTok Shop (13.9%).

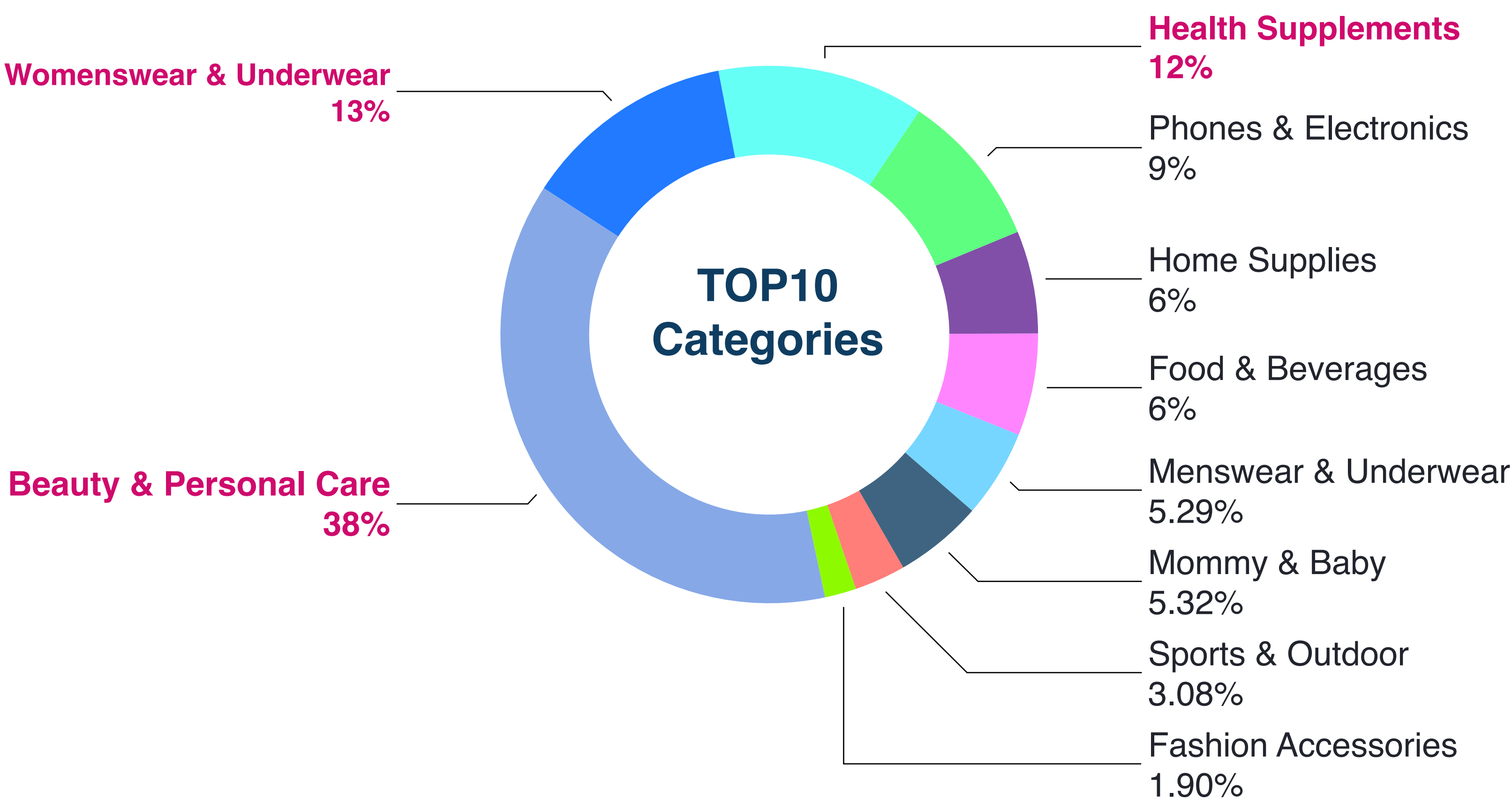
However, after the merger of TikTok and Tokopedia, PT Tokopedia is expected to rank second with a market share of 28.1%, significantly narrowing the gap with Shopee. The previous eCommerce landscape dominated by Shopee and Lazada will also be disrupted.



Additionally, **Temu**—the e-commerce platform under Chinese tech giant Pinduoduo—entered the Philippines and Malaysia in 2023, followed by Thailand and Vietnam in 2024. However, Temu **faced regulatory challenges** in markets like Vietnam and Indonesia. On **December 5, 2024**, Vietnam’s Ministry of Industry and Trade **ordered** Temu to **suspend operations** in the country. Similarly, Indonesia’s Minister of Communication and Information **announced** in October 2024 that Temu’s app had been **removed from local app stores**. Moving forward, Temu must work closely with regulators to ensure compliance.

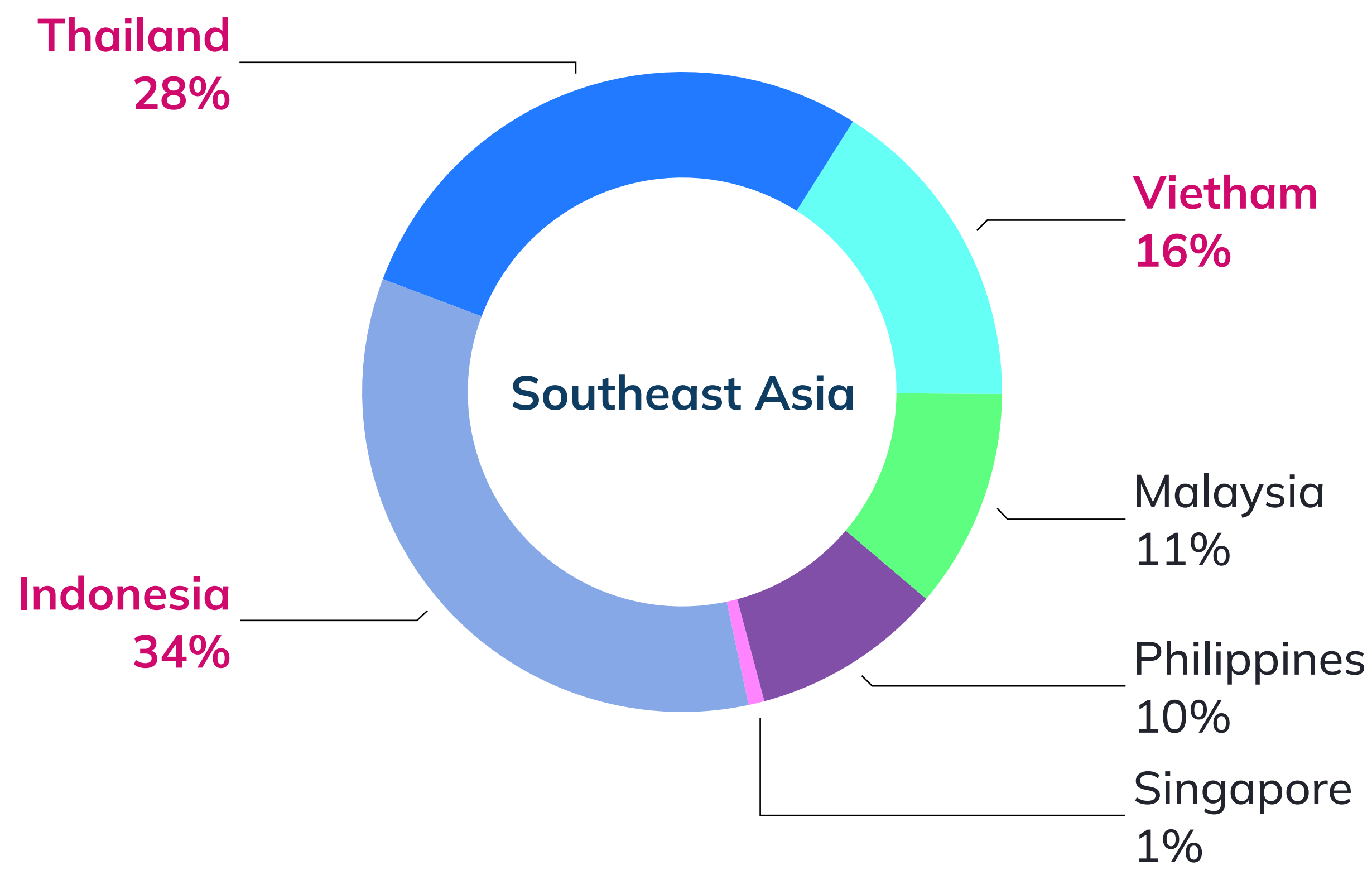
Despite these hurdles, Temu achieved a steady daily GMV exceeding \$1 million within just over a month of operations, reflecting strong market demand. Its growth in Thailand was particularly rapid: The president of Thailand Post noted that Temu’s order volume surged within a month of launch, causing a 20–50% daily drop in parcel volumes for rival platforms. Globally, Temu recorded **550 million downloads in 2024** (a 69% YoY increase), with lifetime downloads nearing 900 million, making it the **most-downloaded shopping app that year**.

Thailand and Indonesia are important markets for TikTok Shop



TOP10 Categories for TikTok Shops

In April 2025, **beauty & personal care** emerged as the **top-performing category** on TikTok Shop among Southeast Asian countries, **accounting for 38% of sales**—the highest share among the platform’s top 10 categories. It was followed by **women’s apparel & lingerie** (13%) and **health & wellness products** (12%).



TikTok Sales Revenue by country

April 2025, TikTok Shop's eCommerce sales in six Southeast Asian countries hit **\$3.66 billion, up 115% year-on-year**. Thailand (34%) and Indonesia (28%) were the largest markets, followed by Vietnam (16%) and Malaysia (11%).

Challenges & Opportunities

	Challenges	Opportunities
Market Development	Underdeveloped markets mean that the existing structures are not yet stable enough, and brands will need to pave new paths in this region without many successful cases to serve as models for learning.	The eCommerce market is maturing. While the pace of development varies between countries, none have stabilized or become saturated like neighboring China and Singapore. This means there is ample room for foreign brands to enter.
Market Entry	Setting up a local legal entity typically requires significant capital investment, and also frequently has local labor requirements.	Cross-border selling is still fairly free and loosely regulated, without significant barriers to entry or high import taxes.
Infrastructure	Logistics infrastructure varies greatly, with some regions experiencing delays of over a week for logistics to travel from one country's hub to another.	Lazada and Shopee are regional platforms that can help develop logistics and infrastructure in underdeveloped areas.
Consumer Base	Poverty remains fairly widespread in Southeast Asia, so many regions are currently inaccessible to eCommerce.	The rapidly growing middle class and youthful population structure will bring astonishing growth potential.

Reference

Related Report:

Datareportal: <https://datareportal.com/>

Specific data:

eCommerce Penetration: <https://www.statista.com/statistics/1040590/apac-e-commerce-share-of-total-retail-by-country/>

Mobile's share of B2C eCommmerce: <https://www.statista.com/statistics/1298171/apac-m-commerce-as-a-share-of-e-commerce-by-country/>

eWallet share of total eCommerce transactions: <https://www.statista.com/statistics/1298216/apac-share-of-digital-payments-by-country/>

TMO Resources

If you're interested in exploring more about any of the regions covered in this quick guide to Southeast Asia, check out our in-depth [eCommerce Market Localization Guides](#) - available in free Starter and paid premium versions!

We lead clients from initial business needs, planning, design, development, and provide long-term technical support and hosting services empowered by smart marketing and cloud computing.

With years of experience in eCommerce implementation and brand globalization, we have provided solutions for many domestic and international enterprises, focusing on the Chinese and overseas markets, especially Southeast Asia, Europe, and North America. We specialize in serving companies in the Health & Beauty for Business-to-Consumer (B2C) / Direct-to-consumer (D2C) & Industry wide focus for Business-to-Business (B2B).

We are committed to growing with our clients and forming long-term, mutually beneficial partnerships.

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About TMO



TMO Group is a Digital Commerce Agency, Based in Shanghai, Chengdu, Hong Kong, Singapore and Amsterdam. We provide brands with Consultancy, Design, Development & Managed services covering (e)Commerce - Data - AI.

TMO offers integrated solutions for the entire eCommerce value chain with a strong focus on Health & Beauty for Business-to-Consumer (B2C) / Direct-to-consumer (D2C) & Industry wide focus for Business-to-Business (B2B).

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