

Southeast Asia eCommerce



By Singapore Post
Samuel Chan

Story of Lac Long Quan





THAILAND



MALAYSIA



MYANMAR



PHILIPPINES



e-Conomy SEA
covers **6 countries**
in Southeast Asia

 **Vietnam**
96M

GDP/Capital : USD 2,567
eCommerce revenue : USD 3.4B

 **Thailand**
70M

GDP/Capital : USD 7,274
eCommerce revenue : USD 5B

 **Philippines**
108M

GDP/Capital : USD 3,103
eCommerce revenue : USD 1.1B

 **Malaysia**
32M

GDP/Capital : USD 11,373
eCommerce revenue : USD 5B

 **Singapore**
6M

GDP/Capital : USD 59,797
eCommerce revenue : USD 7B

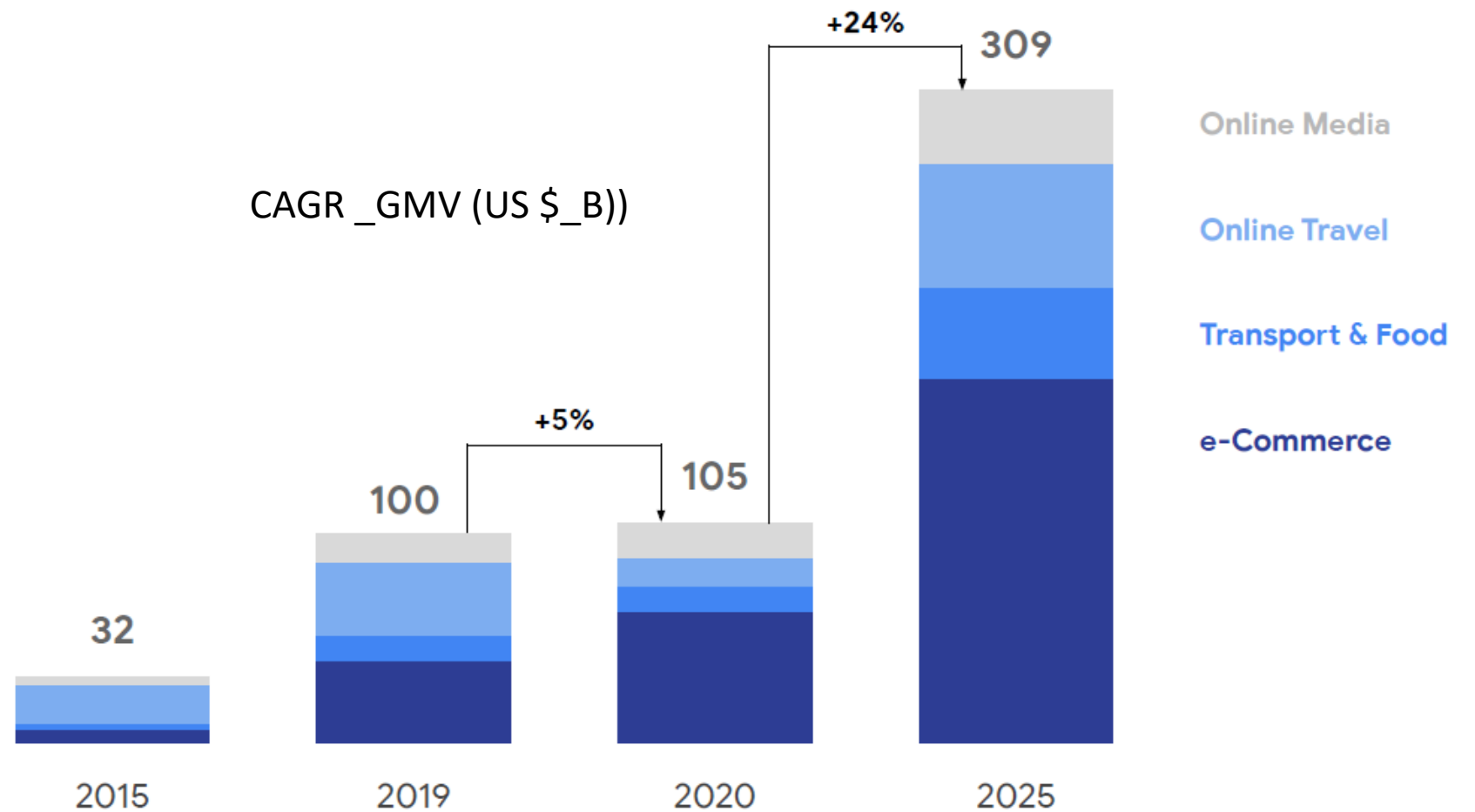
 **Indonesia**
271M

GDP/Capital : USD 3,894
eCommerce revenue : USD 27B

583M

Total population
across the 6
countries

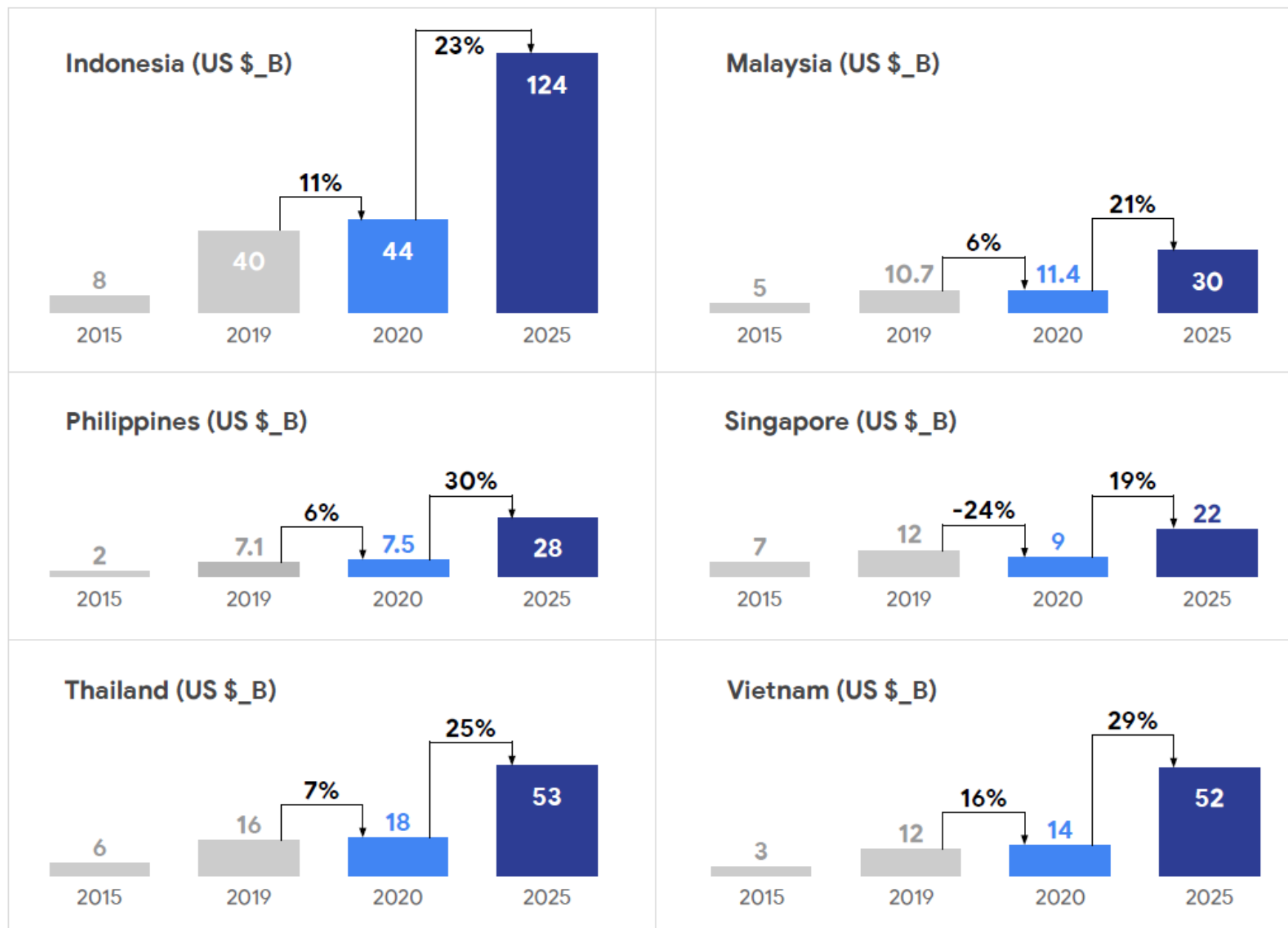
SEA internet economy



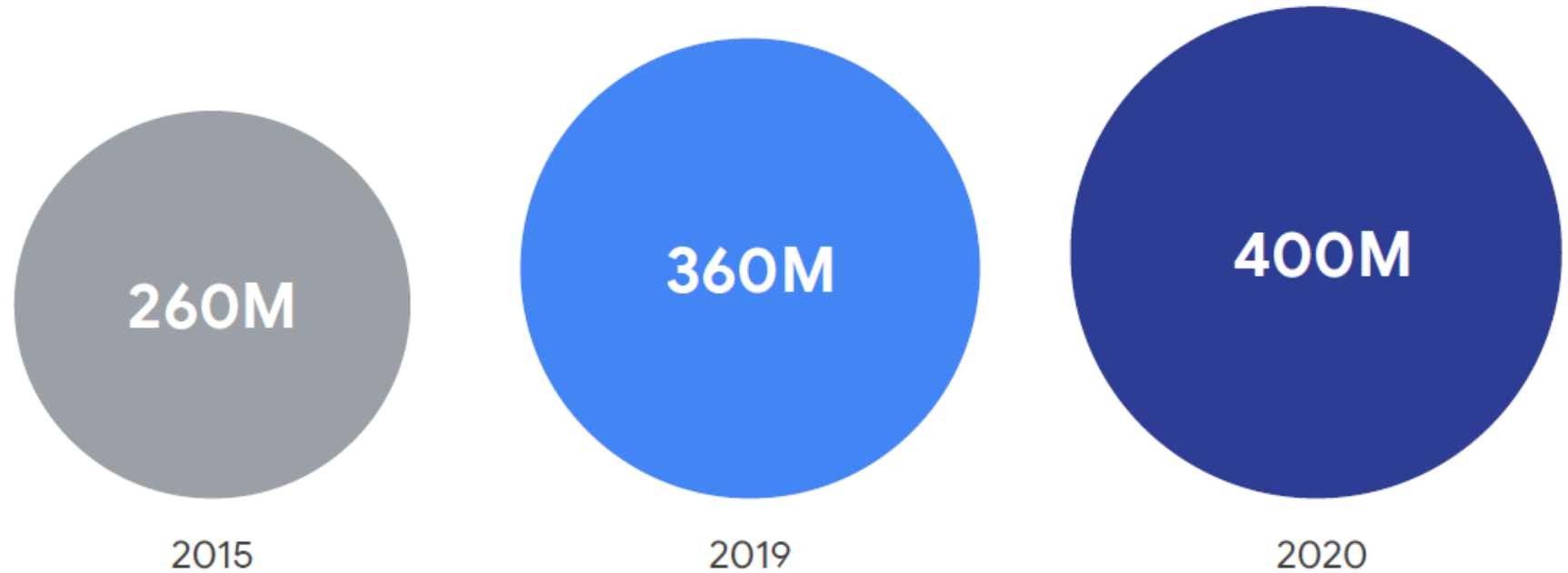
All SEA countries growing at double digits

CAGR

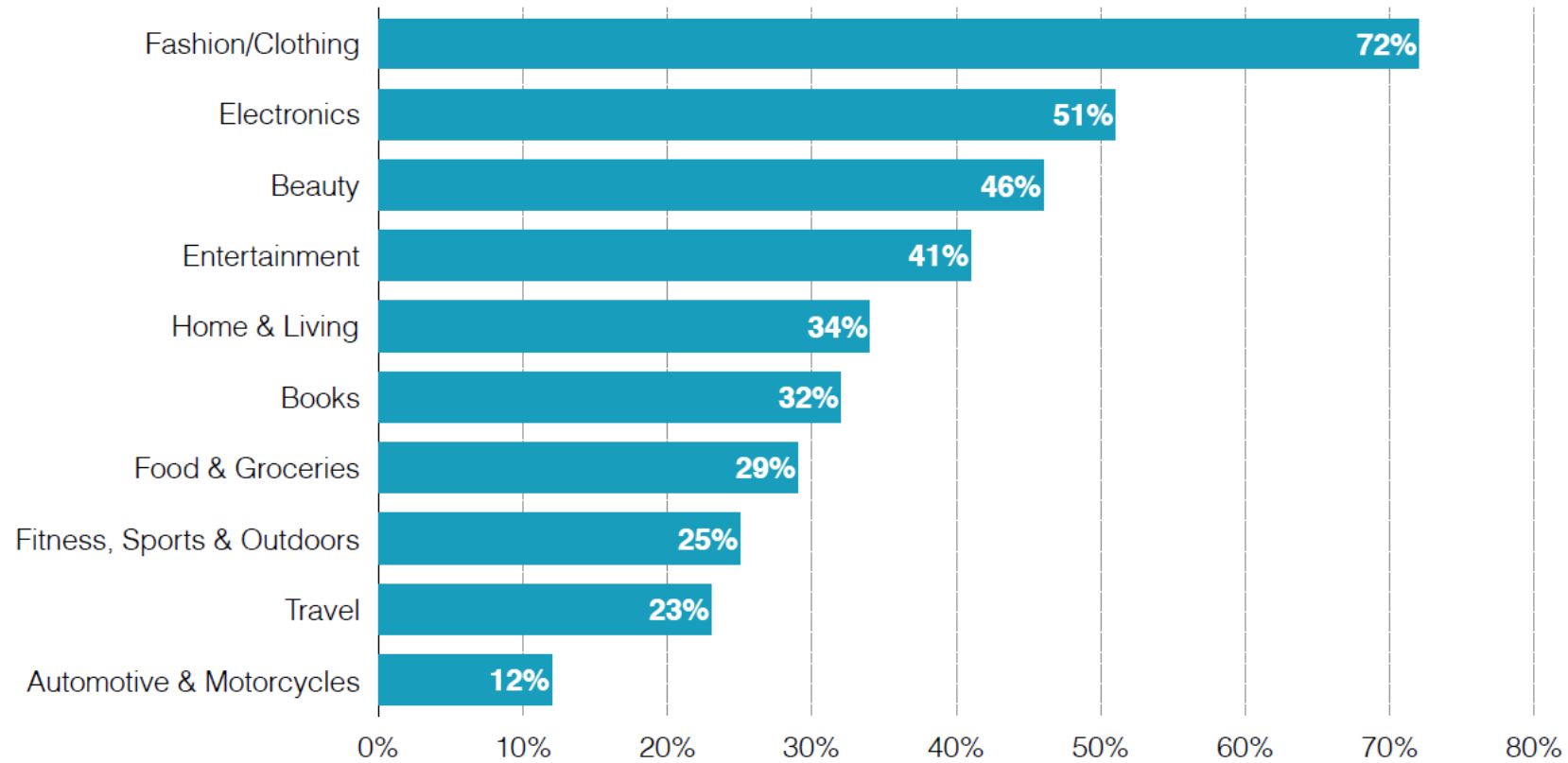
SEA Internet economy GMV (US \$_B)



New users



100M was added between 2015 to 2019, where 40M was added in just one year from 2019 to 2020

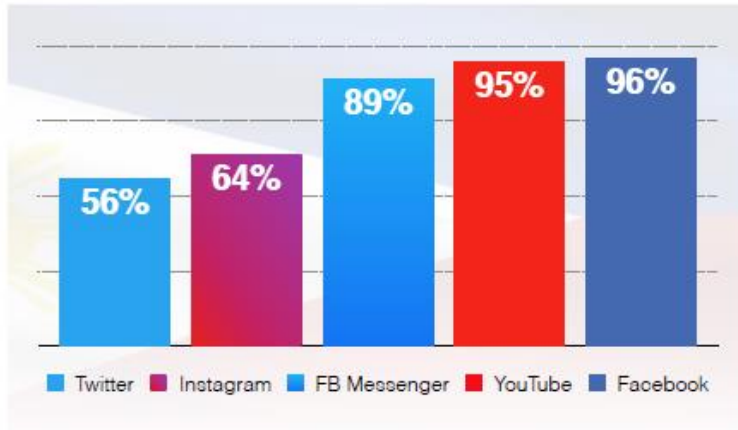


Percentage of Surveyed Respondents Who Had Purchased Each Product Category

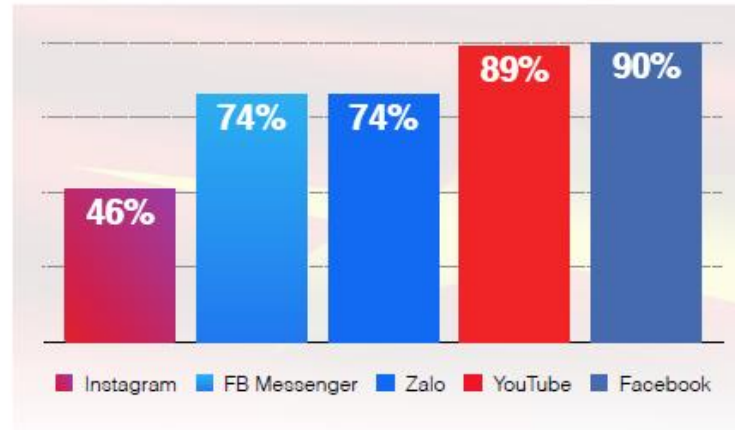
Source: Statista 2018

Most popular product

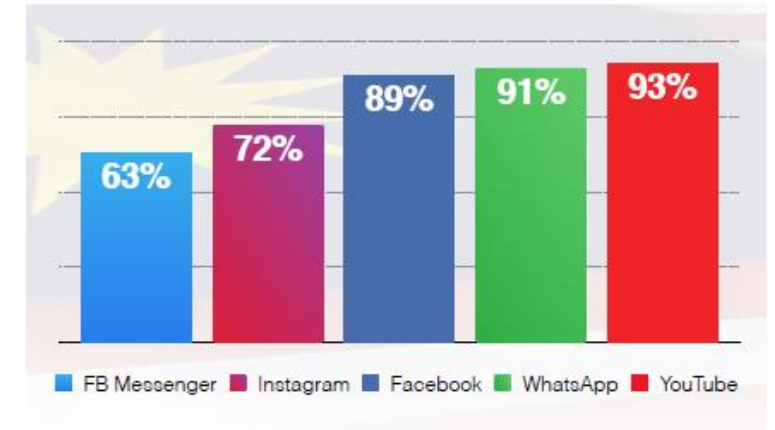
Top social media platforms



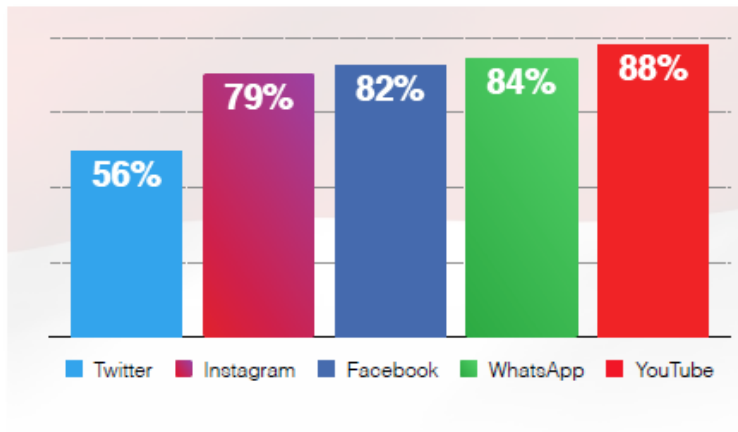
Philippines



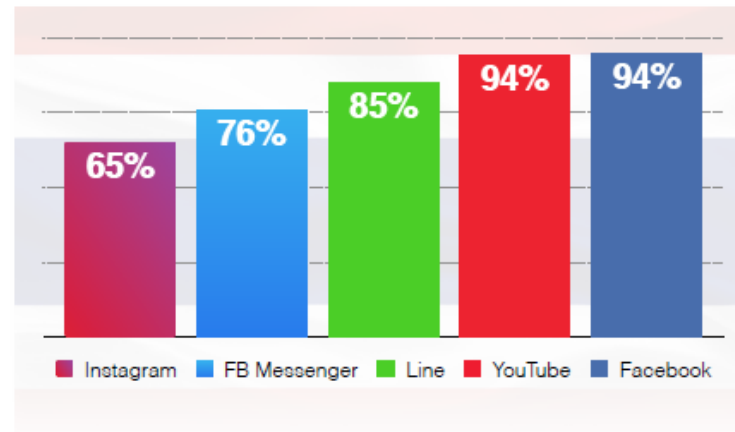
Vietnam



Malaysia



Indonesia



Thailand

Observations:

FB, You Tube, Instagram show strong influences in SEA. Messaging app like Line & Whatsapp have found some success.

ARTICLE

TOP ECOMMERCE MARKETPLACES *IN SOUTHEAST ASIA*



Largest Online Marketplaces

#	Type	Name	Region/Country	Product Category	SE Asia Visits/month
1		Shopee	Southeast Asia	General	342.8M
2		Tokopedia	Indonesia	General	137.3M
3		Lazada	Southeast Asia	General	128.4M
4		Bukalapak	Indonesia	General	30.4M
5		Blibli	Indonesia	General	20.6M
6		Tiki	Vietnam	General	15.6M
7		Sendo	Vietnam	General	7.4M
8		Zalora	Southeast Asia	Fashion	6.9M
9		Qoo10	Southeast Asia	General	3.7M

Market entry considerations

advantages

- Opportunities for overseas sales
- Lower marketing costs
- Part of customer comparison
- Establish trust between brand & customers

disadvantages

- Commission for every sales
- Terms & conditions by marketplace
- Limit direct access to end consumers

eCommerce Logistics



Order fulfilment

Local fulfilment

- Short fulfilment time
- Low transport costs
- Simplify payment

Regional fulfilment

- Resource optimization
- Less inventory risk
- Less partners to work with



Cross border logistics

Airfreight

- Time sensitive delivery.
- Higher cost generally by 5x against road transport, and 16x against sea transport.

Land freight

- Cross border trucking maybe faster & cheaper
- Schedule availability less restrictive

Ocean freight

- Most cost effective when shipping bulk
- Long transit time from point to point

Courier services

- It's about convenience
- Choice between private integrators and country postal organization

Multi-model solutions

- High application in fragmented SEA countries and borders
- Single waybill to integrate different transportation mode to fulfill point to point





Last mile delivery

- Last mile challenges are subjected to each country's topography
- Same day, next day, or time specific service with a cost remains to be different in each country
- Receiving option includes door-step, postbox, drop-off box, convenient stores, retail stores etc.
- Real time tracking is expected, with choices of notification
- COD payment option is important in SEA countries
- Competitive cost to create customer centric delivery options

Thank You



Samuel Chan

Email: samuel.chan@singpost.com

Mobile: (65) 9663 4325