

Southeast Asia Cross-border E-commerce - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Southeast Asia Cross-border E-commerce Market size is estimated at USD 45.39 billion in 2025, and is expected to reach USD 76.97 billion by 2030, at a CAGR of 11.14% during the forecast period (2025-2030).

Cross-border e-commerce is the global market's future. The increasing ease of logistics has made buying or selling overseas a viable and intriguing option for people worldwide. Southeast Asia is the hotspot for global e-commerce goods. Southeast Asians have demonstrated a strong interest in cross-border trade. The following are fascinating facts about Southeast Asian countries' participation in the cross-border e-commerce market. Singapore and Malaysia account for roughly half Southeast Asia's cross-border e-commerce market. Thailand's e-commerce market is rapidly expanding. The Thailand 4.0 policy aims to improve internet access in every village nationwide. By introducing more innovative and niche products, Vietnam and the Philippines demonstrated significant cross-border potential.

Customers' demand and the viability of manufacturers sourcing products or services have been the primary drivers of emerging cross-border e-commerce. Furthermore, Southeast Asia has seen the highest population growth, with more income, handy tech in their pockets, and better internet connectivity; the region has more active users than the United States or Japan, paving the way for competitive e-commerce. In parallel, factors such as the desire for higher quality at a lower cost and the scarcity of products in the domestic market are driving the growing popularity of cross-border e-commerce trading. Manufacturers see these factors as an opportunity to expand into new geographies, particularly Southeast Asia, to broaden their overall clientele base for business sales.

Cross-border e-commerce is expected to grow faster than the overall E-commerce market, particularly in Southeast Asia. Because of the crowded population, rising disposable income, internet users, smartphone usage, and infrastructure improvements, among

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other factors, logistics services have developed more efficiently and rapidly. Southeast Asia cross-border E-commerce is thriving, and taking advantage of niche products, low prices, high-quality goods, and other factors is driving up demand for this E-commerce market. Furthermore, cross-border E-commerce faces numerous challenges, such as high delivery costs, short delivery deadlines, currency, language, etc. Again, online payments are hampered in some countries due to a need for bank accounts.

For example, proper product advertising and marketing are set to become significant points of emphasis, as the e-commerce industry has suffered dramatically from product returns and refunds. Smaller e-commerce brands will invest more in current product campaigns, as accurate product representation may deter rising product return rates. Within this, e-commerce operators are likely interested in mixed-media promotion or a hybrid of static and video campaigns. Smaller e-commerce brands will also consider the consumer-seller relationship in 2023. E-commerce sellers may attempt to personalize a buyer's shopping experience to avoid fast and impersonal consumer goods transactions in e-commerce.

Southeast Asia Cross-border E-commerce Market Trends

Growth In E-commerce Sector In The Region Driving The Market

Southeast Asia's growth stands out even more because most other geographies will only see modest increases this year. The Philippines, Indonesia, Vietnam, Malaysia, and Thailand are predicted to be among the top ten retail e-commerce sales growth markets.

People value having options. When compared to Western consumers, Southeast Asian consumers prefer to see the same product listed by multiple sellers so that they can compare prices or delivery times. This is similar to their offline behaviors, where you might see a street of lamp stores or a street of butchers. That is uncommon in Western retail. People are also highly price-sensitive because their income is generally low. Playful interfaces also appeal to consumers in the region, as a result gamification, vibrant colors, pop-ups, and blinking features are found at retailers such as Shopee. Nowadays, the average consumer has more free time, so they prefer to be entertained while shopping.

According to experts, Thailand's e-commerce market is a dominant sales channel in the country, with a transaction value of USD 31 billion in 2023. The transaction value is expected to grow annually by 13.33% and reach USD 51 billion by 2027. Several factors drive this growth: increased internet usage, improved logistics and e-payment systems, and government policies. According to industry reports, Thailand holds one of the world's most significant internet penetration rates, at 85.3%. The country's internet user base was around 61.21 million in January 2023. Thailand 4.0, the Thai government's policy, included a budget for constructing a broadband network across the country's villages.

Growth In Social Commerce In The Region Propelling The Market Growth

Social commerce allows brands to interact with their audience on their preferred social media platforms throughout the purchasing experience, from product discovery to checkout. Allowing users to simultaneously shop while interacting with friends, reading news, and watching videos keeps people where they want to be.

In 2023, the annual gross merchandise volume (GMV) of the e-commerce market in Singapore was valued at USD 8 billion. The quality and price of the products are more important to Singapore's e-commerce market than sales volume. The main reasons for Singapore's success are high GDP per capita, a well-developed ICT infrastructure, and the government's desire to turn Singapore into a smart nation. While the total revenue may be lower than in Indonesia, the revenue per order and the frequency of ordering online per person are much higher than in Indonesia, as experts suggest.

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Another critical factor is the growing demand for one-stop-shop platforms. Consumers are looking for platforms that allow them to discover and buy products. Consumers are increasingly interested in a smooth transition from discovery to purchase. Finally, online shoppers want platforms that enable them to communicate with sellers. Social commerce allows for direct communication with brands, which fosters trust and encourages sellers to provide better customer service and customers to purchase more products.

Southeast Asia Cross-border E-commerce Industry Overview

The Southeast Asia Cross-border E-commerce Market landscape is fragmented, with many local and regional players dominating the market. The major players include Shopee, Lazada, Tokopedia, Qoo10, Bukalapak, and many more. Social commerce is one of the major factors driving the market. It has created the opportunity for new players to enter the market. Regional and Local players hold a significant share due to social commerce, which provides an advantage in the market and thus gives less space for global players to enter the market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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