Southeast Asia E-Commerce Market: Current Analysis and Forecast (2025-2033)

https://marketpublishers.com/r/S10349137005EN.html
Date: September 2025
Pages: 90
Price: US$ 3,999.00 (Single User License)
ID: S10349137005EN

Abstracts

E-commerce is the process of buying and selling goods and services online and on digital platforms using the internet, allowing consumers and businesses to finalize transactions without physical interaction. It includes online shopping, electronic payments, digital marketing, and integration of logistics, and reinvents conventional retail through convenient, diversified, and accessible shopping at scale.

The Southeast Asian E-Commerce market is expected to exhibit a growth rate of 21.13% during the forecast period (2025-2033F) due to the growing rates of internet and smartphone adoption, younger and more digital-minded people, higher levels of confidence in online payments, and government encouragement of digital economy developments. As per the International Trade Administration, U.S. Department of Commerce, the total internet economy for Southeast Asia is forecast to grow from USD 194 billion to over USD 330 billion by 2025, with Indonesia leading the rest of the region's markets with an internet economy of over USD 82 billion in 2023. Also, online retail adoption is further propelled by rapid urbanization and the growing number of middle-class individuals, characterized by increased disposable incomes. The disjointed retailing landscape of the region also presents the opportunity for the e-commerce platform to intervene as a more convenient alternative.

> Based on type, the market is segmented into electronic; fashion; toys, hobbies, and DIY; beauty, health, personal, & household care; furniture; and others. Among these, the electronic category held the dominant share of the e-commerce market in 2024. The growing digital adoption is creating a boom in demand for smartphones, laptops, and other smart devices. Also, competitive prices, warranties, and flash sales are conducted online, attracting millions of tech-savvy customers. The electronics market is also driven by the fast

development of the online-exclusive stores and brand-owned markets in Southeast Asia. For example, on August 14, 2024, Samsung Electronics Philippines Co. announced the release of the new Samsung Shop App in selected markets within Southeast Asia and Oceania, as part of its mission to enhance and streamline the online shopping experience for Samsung users and fans. Purchases of electronic products continue to be made online in large numbers in the Southeast Asia and Oceania region.

Based on payment method, the Southeast Asian E-Commerce market is segmented into cards, domestic payments, mobile wallets, BNPL, and others. Among these, the domestic payments market is expected to grow with a significant CAGR during the forecast period (2025-2033) through secure, local, and convenient transactions that are customized to meet the financial ecosystem of countries. It helps consumers with the inaccessibility of international cards, thereby extending the market for e-commerce systems. Additionally, the increasing adoption of this method in emerging Southeast Asian markets is expected through the introduction of bank transfers, local gateways, and cash-linked digital options. For example, on August 19, 2025, NTT DATA Payment Services officially launched ADAPTIS, its unified suite of integrated payment solutions, at a high-profile event in Manila. This is launched in the Philippines after successful rollouts in Malaysia and Thailand, offering five integrated services: In-Store, e-Commerce, Financing, Enterprise, and Value-Added Services.

For a better understanding of the market adoption of the Southeast Asian E-Commerce market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow at a significant CAGR during the forecast period (2025-2033) in Southeast Asia, with a young, digitally engaged population and a high adoption of mobile-first. Furthermore, the growing government initiative to adopt a cashless system, coupled with the increasing popularity of mobile wallets, is prompting consumers to shift away from cash-on-delivery payments toward digital forms of payment. Moreover, Vietnamese consumers are increasingly selecting products due to competitive pricing and the influx of cross-border trade, especially from China. As logistics and consumer confidence continue to improve, Vietnam is emerging as a strategic hub for regional e-commerce growth. As an example, on September 3, 2025, AnyMind Group, a BPaaS company focused on marketing, e-commerce, and digital transformation, stated that it completed its acquisition of

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the Vietnam-based live and social commerce agency Vibula, initially announced on April 25, 2025. Additionally, the deal unlocks various strategic synergies between Vibula and the AnyMind Group, combining Vibula's expertise in live commerce operations with AnyMind's proprietary technology platforms.

Some major players running in the market include Shopee (Sea Limited), Lazada (Alibaba Group Holding Limited), PT GoTo Gojek Tokopedia Tbk (GoTo), Blibli (PT Global Digital Niaga Tbk.), Carousell, TI KI Company Limited, PT Bukalapak, ZALORA, Sendo Farm (FPT Corporation), and Qoo10 Singapore.

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