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iprice group

Provides market insights & analysis

APP ANNIE

Provides data points on mobile applications

SimilarWeb

Provides data points on website traffic

This Report Covers 6 Countries in Southeast Asia

Indonesia

Malaysia

Philippines

Singapore

Thailand

Vietnam

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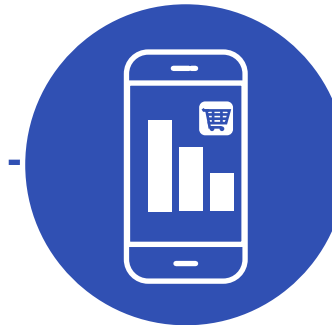iprice group

Report Outline

Part 1

Part 2

Part 3

Vital Insights on the

**Most Popular
E-Commerce Applications
in Southeast Asia**

Vital Insights on the

**Most Visited
E-Commerce Websites
in Southeast Asia**

Local Insights

**Rankings of
E-Commerce Platforms
in Each Southeast
Asian Country**

Vital Insights on the

Most Popular E-Commerce Applications in Southeast Asia

Q3 2019

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The Most Popular Mobile E-Commerce Applications in Southeast Asia, Q3 2019

HIGHEST MONTHLY ACTIVE USERS	
1	Shopee
2	Lazada
3	Tokopedia
4	Bukalapak
5	AliExpress
6	Zalora
7	Amazon
8	Tiki
9	Sendo
10	eBay

MOST DOWNLOADED	
1	Shopee
2	Lazada
3	Tokopedia
4	Wish
5	Sendo
6	Bukalapak
7	Tiki
8	Blibli
9	Zilingo
10	Alibaba.com

Shopee & Lazada are more competitive in mobile app rankings compared to web visits

Despite being challenged by the likes of Tokopedia in Indonesia & Sendo in Vietnam on the web platform, Shopee & Lazada still rank at the top on mobile app.

Southeast Asia is entering the age of 'shoppertainment'

This quarter, Shopee, Lazada, & other major players focused on offering initiatives, such as live streaming events, and in-app games, to increase user engagement.

Surprise of the quarter

Cross-border application, Wish, appeared in the top 5 most downloaded for the first time, showing a serious foray into the Southeast Asian market.

Mobile E-commerce apps were identified by iPrice Group & App Annie from the Shopping categories on the iOS App Store & Google Play. Our analysis is limited to Apps identified as coming from organizations that primarily sell physical products to consumers. This includes apps from organizations with no, or a limited number of, physical outlets, or universal shopping basket apps that facilitate transactions through other retailers. The analysis excludes apps that primarily drive C2C transactions, third parties providing vouchers & coupons, & apps not related to selling goods despite being from retailers.

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Shopee & Lazada Are Once Again Neck & Neck Across Southeast Asia

The two multinational giants are still fighting for the number one spot in the region

Mobile Apps With The Highest Number of Monthly Active Users, Q3 2019

	ID	MY	PH	SG	TH	VN
1	Shopee	Lazada	Lazada	Lazada	Lazada	Shopee
2		Shopee	Shopee		Shopee	Lazada
3				Shopee		
4	Lazada					
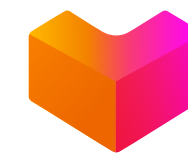
Lazada ranks first in
4 out of 6 countries
Malaysia, Philippines, Singapore and Thailand

Shopee leads in
Vietnam & Indonesia
*projected to be the biggest markets in SEA

APP ANNIE

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Product Categories for E-commerce Platforms: The More the Merrier?
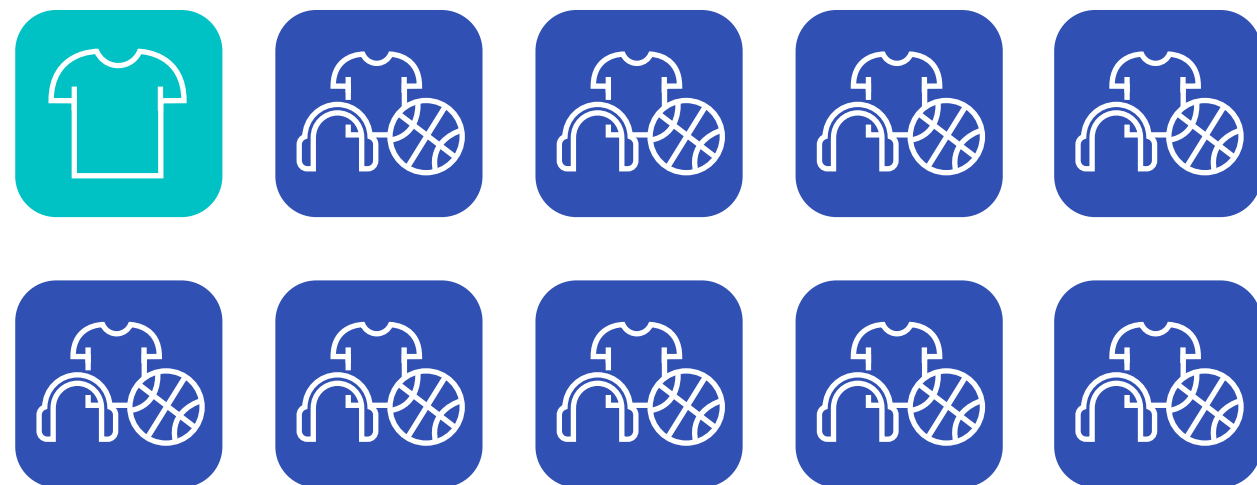
9 out of 10

applications with the highest number of Monthly Active Users offer products in multiple different categories

This shows that multiple-category marketplace platforms may be the future of Southeast Asian e-commerce due to convenience and their strong financial backing.

Vital Insights on the

Most Visited E-Commerce Websites in Southeast Asia

Q3 2019

SimilarWeb **iprice group**

The Most Visited E-Commerce Websites in Southeast Asia, Q3 2019

Indonesia	Malaysia	Philippines	Thailand	Vietnam	Singapore
1 tokopedia	1 Shopee	1 Lazada	1 Lazada	1 Shopee	1 Lazada
2 Shopee	2 Lazada	2 Shopee	2 Shopee	2 Sendo.vn	2 Qoo10
3 Bukalapak	3 Lelong.my	3 ZALORA	3 NBS NotebookSPEC	3 thegioididong	3 Shopee
4 Lazada	4 ZALORA	4 ebay	4 Pomelo.	4 TiKi.	4 ezbuy
5 blibli.com	5 PGMALL	5 BEAUTY MNL	5 Chilindo	5 Lazada	5 ZALORA

Data provider SimilarWeb introduced a major algorithm update on September 2019, which affected the total visits recorded for all websites in Q3 2019.

SimilarWeb **iprice group**

Which Southeast Asian Country Visits E-Commerce Websites the Most

Comparing Each Country's E-Commerce Web Traffic With the Regional Total

Q2 2019

INDONESIA **46.9%** | THAILAND **10.8%** | PHILIPPINES **6.3%**

VIETNAM **25.7%** | MALAYSIA **7.1%** | SINGAPORE **3.2%**

Q3 2019

INDONESIA **36.3%** | THAILAND **13%** | PHILIPPINES **8.2%**

VIETNAM **30.9%** | MALAYSIA **7.8%** | SINGAPORE **3.9%**
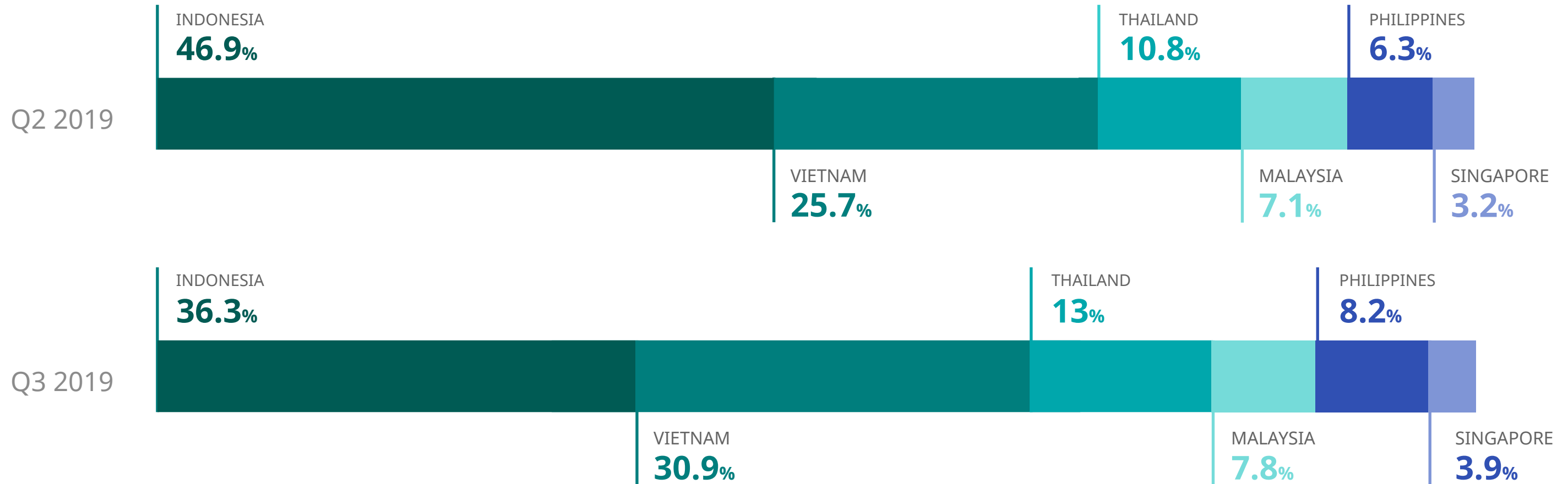
E-commerce websites in **Vietnam** & **Indonesia** earned significantly more visits than in other countries, accounting for **30.9%** & **36.3%** of the region's e-commerce web traffic respectively.

Compared to last year, **Philippines** & **Thailand** saw improvements in e-commerce website usage, by **1.9%** & **2.2%** of regional total respectively.

SimilarWeb

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The Battle of Regional & Local E-Commerce Companies, Q3 2019
Comparing Web Traffic Market Share

■ Regional Companies   ■ Local Companies

Country	Regional	Local
Singapore	9%	91%
Vietnam	28%	72%
Indonesia	39%	61%
Thailand	78%	22%
Malaysia	89%	11%
Philippines	96%	4%
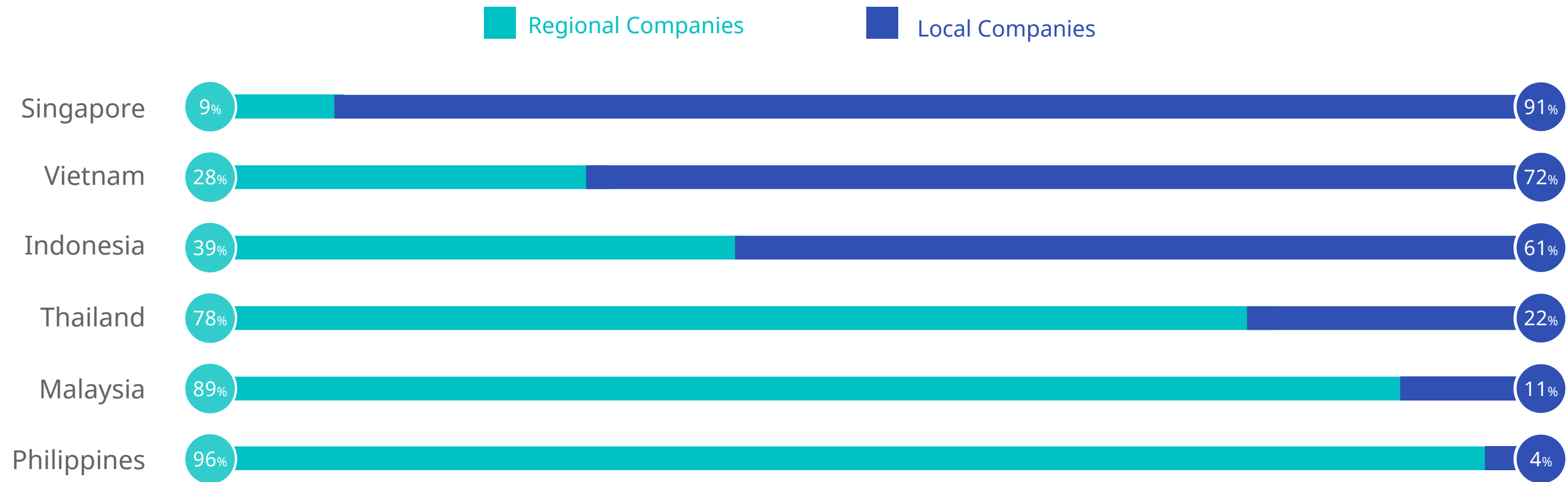
Local Singaporean companies
are the most successful, with both Lazada and Shopee in the regional forefront.

Vietnam and Indonesia's
local companies (Tiki & Sendo in Vietnam, Tokopedia & Bukalapak in Indonesia) are fiercely competing with Shopee & Lazada.

Philippines and Malaysia
are mostly dominated by regional companies' e-commerce websites.

Local Insights

Rankings of E-Commerce Platforms in Each Southeast Asian Country

Q3 2019

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Lazada

Sendo

S

Qoo10

ebay

Z

tokopedia

INDONESIA

MOST VISITED WEBSITES
(MOBILE WEB/DESKTOP)

RANK	MERCHANT	MONTHLY VISITS
1	Tokopedia	65,953,400
2	Shopee	55,964,700
3	Bukalapak	42,874,100
4	Lazada	27,995,900
5	Blibli	21,395,600
6	JD ID	5,524,000
7	Bhinneka	5,037,700
8	Sociolla	3,988,300
9	Orami	3,906,400
10	Ralali	3,583,400

HIGHEST MONTHLY ACTIVE USERS
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	1 ↑
2	Tokopedia	1 ↓
3	Bukalapak	
4	Lazada	
5	JD.id	
6	Blibli.com	
7	ZALORA	
8	AliExpress	
9	Zilingo	
10	Amazon	

MOST DOWNLOADED
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	
2	Lazada	1 ↑
3	Tokopedia	1 ↓
4	Bukalapak	
5	Blibli.com	2 ↑
6	Sorabel	1 ↓
7	Wish	NEW
8	Zilingo	2 ↓
9	JD.id	1 ↓
10	ZALORA	1 ↓

iprice.co.id   Malaysia   Vietnam   Thailand   Singapore   Philippines

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INDONESIA

MOST VISTED WEBSITES (MOBILE WEB/DESKTOP)

tokopedia **Shopee**

Local player **Tokopedia** has the **biggest web traffic market share in Q3 2019 at 25%**. **Shopee** places second nationally with **22% of total market share**.

Shopee **Lazada**

Regional players **Shopee** & **Lazada's** market shares **increased by 2.8 percentage points** and **0.5 percentage points** respectively.

HIGHEST ACTIVE USERS/MOST DOWNLOADED (MOBILE APP)

Shopee

Shopee overtook Tokopedia in having the highest monthly active users in Q3.

Lazada

Lazada moved up a rank and **achieved 2nd place for the Most Number of App Downloads** in Q3.

wish

Wish appeared in the top 10 most downloaded in Indonesia **for the 1st time**.

MALAYSIA

MOST VISITED WEBSITES
(MOBILE WEB/DESKTOP)

RANK	MERCHANT	MONTHLY VISITS
1	Shopee	25,789,300
2	Lazada	18,251,600
3	Lelong	2,223,000
4	Zalora	1,314,700
5	PG Mall	876,100
6	eBay	740,300
7	GoShop	698,900
8	PrestoMall	643,200
9	ezbuy	518,200
10	Hermo	505,800

HIGHEST MONTHLY ACTIVE USERS
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Lazada	
2	Shopee	
3	Taobao	
4	PrestoMall	
5	AliExpress	
6	ZALORA	
7	eBay	1 ⬆
8	Wish	2 ⬆
9	Amazon	
10	Lelong.my	3 ⬇

MOST DOWNLOADED
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	
2	Lazada	
3	Wish	1 ⬆
4	Go Shop	1 ⬆
5	Alibaba.com	2 ⬆
6	Taobao	
7	ZALORA	4 ⬇
8	Sephora	
9	eBay	1 ⬆
10	Amazon	NEW

Indonesia   iprice.my   Vietnam   Thailand   Singapore   Philippines

MALAYSIA

MOST VISTED WEBSITES (MOBILE WEB/DESKTOP)

Shopee & **Lazada** kept the same spot as Q2, but **Shopee's market share increased by 7 percentage points** (biggest improvement in SEA). **Lazada** meanwhile **obtained more than 18 million visits** from Malaysia.

Breaking into the top 5 is PG Mall, a local online shopping mall. **PG Mall** stated they **aim to achieve US$4.8 mil in sales by end 2019** to match the growth of Malaysia's the digital sector.

11Street Malaysia was rebranded as Prestomall in June 2019. Since then, their website has moved up **from #14 in Q2 to #8 in Q3**.

HIGHEST ACTIVE USERS/MOST DOWNLOADED (MOBILE APP)

Wish made noticeable improvements: **moved up 1 place in the app download ranking** and **2 places in the MAU ranking**.

The Chinese based e-commerce platforms **Taobao** & **AliExpress** remained highly prominent in Malaysia. The mobile apps **ranked at #3 & #5 respectively**.

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VIETNAM

MOST VISITED WEBSITES
(MOBILE WEB/DESKTOP)

RANK	MERCHANT	MONTHLY VISITS
1	Shopee	34,569,900
2	Sendo	30,929,800
3	Thegioididong	29,307,200
4	Tiki	27,114,500
5	Lazada	24,364,700
6	Dien May Xanh	10,696,300
7	FPT Shop	8,252,100
8	Dien May Cho Lon	6,565,200
9	Adayroi	6,414,200
10	CellphoneS	5,689,400

HIGHEST MONTHLY ACTIVE USERS
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	
2	Lazada	
3	Tiki.vn	
4	Sendo	
5	AliExpress	
6	Adayroi	
7	Amazon	
8	eBay	
9	Alibaba.com	1 ⬆
10	Taobao	NEW

MOST DOWNLOADED
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	
2	Sendo	
3	Tiki.vn	1 ⬆
4	Lazada	1 ⬇
5	SHEIN	2 ⬆
6	Alibaba.com	3 ⬆
7	The gioi di dong	2 ⬇
8	Taobao	
9	Adayroi	3 ⬇
10	Amazon	NEW

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VIETNAM

MOST VISTED WEBSITES (MOBILE WEB/DESKTOP)

Sendo.vn

Home-grown player **Sendo** made a surprising improvement by **jumping from #4 to #2 nationally**, entering the top 2 for the first time.

Lazada

Lazada moved from #3 to #5 nationally reflecting their web traffic market share **decrease of 1.3 percentage points**.

Shopee

Shopee Vietnam organized their **biggest sales campaign of the year during 9/9**, & continued to strengthen their 1st place nationally.

HIGHEST ACTIVE USERS/MOST DOWNLOADED (MOBILE APP)

9/9

9/9 was a big sales event in Vietnam that many merchants took advantage of by offering new features and sales campaigns on their apps.

TIKI.

Tiki improved their app download ranking from 4th to 3rd. This quarter, Tiki tested a new livestream function for their app which might have triggered more downloads.

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THAILAND

MOST VISITED WEBSITES
(MOBILE WEB/DESKTOP)

RANK	MERCHANT	MONTHLY VISITS
1	Lazada TH	42,335,700
2	Shopee TH	28,232,700
3	Notebook Spec	2,252,400
4	Pomelo	1,933,600
5	Chilindo	1,782,500
6	Advice	1,736,200
7	JIB	1,630,700
8	Powerbuy	1,519,400
9	Central Online	1,503,000
10	JD Central	1,466,700

HIGHEST MONTHLY ACTIVE USERS
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Lazada	
2	Shopee	
3	AliExpress	
4	JD CENTRAL	
5	eBay	1 ↑
6	Amazon	1 ↓
7	Alibaba.com	
8	Chilindo	1 ↑
9	Banggood	1 ↑
10	Wish	NEW

MOST DOWNLOADED
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	1 ↑
2	Lazada	1 ↓
3	Wish	1 ↑
4	SHEIN	1 ↓
5	JD CENTRAL	
6	Chilindo	2 ↓
7	Alibaba.com	2 ↑
8	AliExpress	
9	Tops Supermarket	NEW
10	Thisshop	NEW

Indonesia · Malaysia · Vietnam · **ipricethailand.com** · Singapore · Philippines

THAILAND

MOST VISTED WEBSITES (MOBILE WEB/DESKTOP)

Pomelo.

Fashion e-commerce **Pomelo jumped from #10 in Q2 to #4 in Q3**, showing the biggest improvement among the Thailand's top 10 this quarter.

Lazada

Lazada continued to lead Thailand in monthly web traffic, **achieving 46% of e-commerce web traffic market share** this quarter.

ThisShop

ThisShop, an electronics e-commerce, **jumped all the way from rank #29 in Q2 19 to #18** this quarter.
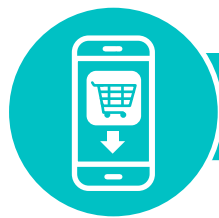
HIGHEST ACTIVE USERS/MOST DOWNLOADED (MOBILE APP)

Shopee

Shopee moved up one place and **took the 1st place in app downloads**

Wish

Wish made an impressive push in Thailand and **moved up 4 places** in the app downloads ranking.

ThisShop

ThisShop, besides the improvement in web traffic, also **entered the top 10** most download apps this quarter.

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PHILIPPINES

MOST VISITED WEBSITES
(MOBILE WEB/DESKTOP)

RANK	MERCHANT	MONTHLY VISITS
1	Lazada	35,619,900
2	Shopee	18,174,000
3	Zalora	1,539,500
4	Ebay	796,400
5	Beauty MNL	795,300
6	Argomall	393,300
7	Galleon	259,100
8	O Shopping	258,400
9	Sephora	134,600
10	Zeus	62,200

HIGHEST MONTHLY ACTIVE USERS
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Lazada	
2	Shopee	
3	ZALORA	
4	Amazon	
5	AliExpress	
6	BeautyMNL	
7	eBay	
8	Sephora	
9	Alibaba.com	
10	Wish	NEW

MOST DOWNLOADED
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	
2	Lazada	
3	Wish	NEW
4	Zilingo	1 ↓
5	Zaful	1 ↓
6	ZALORA	1 ↓
7	Alibaba.com	
8	BeautyMNL	
9	Amazon	1 ↑
10	Newchic	1 ↓

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PHILIPPINES

MOST VISTED WEBSITES (MOBILE WEB/DESKTOP)

Lazada and **Shopee** kept their ranking the same as last quarter. However, **Lazada's market share increased by 5.6 percentage points** while **Shopee's decreased by 2.8 percentage points**.

Sephora entered the top 10 in Q3, **moving from rank #11 to #9**.

HIGHEST ACTIVE USERS/MOST DOWNLOADED (MOBILE APP)

4 out of 10 most downloaded apps this quarter are e-commerce apps for fashion products (Zilingo, Zaful, Zalora, Newchic).

Wish appeared in the top 10 most downloaded in the Philippines for the 1st time.

SINGAPORE

MOST VISITED WEBSITES
(MOBILE WEB/DESKTOP)

RANK	MERCHANT	MONTHLY VISITS
1	Lazada	7,803,900
2	Qoo10	6,943,100
3	Shopee	4,117,000
4	EZBuy	1,366,244
5	Zalora	1,197,762
6	eBay	823,634
7	Courts Singapore	787,515
8	Love, Bonito	473,869
9	Forty Two	415,753
10	Reebonz	394,410

HIGHEST MONTHLY ACTIVE USERS
(MOBILE APPS)

RANK	MERCHANT
1	Lazada
2	Qoo10
3	Shopee
4	Taobao
5	ezbuy
6	ZALORA
7	AliExpress
8	Amazon
9	Wish
10	Amazon Prime Now

MOST DOWNLOADED
(MOBILE APPS)

RANK	MERCHANT	Q2 COMPARISON
1	Shopee	
2	Lazada	
3	Wish	2 ▲
4	ezbuy	
5	Qoo10	2 ▼
6	Amazon Prime Now	
7	Taobao	1 ▲
8	ZALORA	1 ▼
9	Amazon	
10	AliExpress	NEW

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SINGAPORE

MOST VISTED WEBSITES (MOBILE WEB/DESKTOP)

Shopee

Shopee has increased their web traffic market share significantly from **11.21% in Q2 to 14.85% in Q3**.

Qoo10

Qoo10 remains a prominent player as the **top 3 most visited e-commerce platforms** by deepening its localisation strategy in the Lion City.

amazon.sg

With the launch of **Amazon.sg**, the US-based company continues to tailor their products to Singaporeans, which pushed them up from **rank #14 to #12 within one quarter**.

HIGHEST ACTIVE USERS/MOST DOWNLOADED (MOBILE APP)

wish

Wish was the most improved this quarter by **jumping two places to become the 3rd most downloaded**.

淘宝网 Taobao.com

Taobao recorded an improvement on its ranking **from #8 to #7 among most downloaded apps** in Q3 2019.

Methodology

Research Methodology for the Rankings of the Top Mobile E-Commerce Apps

App Annie Intelligence for iPhone & Android phone were derived from mobile usage data collected from a large sample of real-world users, combined with additional proprietary data sets. For the purposes of this report, an active user is defined as a device having one or more sessions with an app in the time period. A single person may be active on multiple devices in any time period & will therefore be counted as one user per device in the total active users. Monthly Active Users (MAU) & Total Downloads rankings in this report are based on unified apps made possible by App Annie's exclusive DNA. In unified apps, similar versions of the same app with different names & on different platforms are unified.

Research Methodology for the Most Visited E-Commerce Websites

All data on the total visits on desktop & mobile web in this study were taken from global traffic figures from the respective websites as of October 2019 from SimilarWeb. The following industries were not included in this list: e-ticketing, financial services, rental services, insurance, delivery service, food & beverage, meta-search, couponing, cashback websites & ecommerce who solely provides classified ads/P2P services. SimilarWeb introduced a major algorithm update on September 2019 which affected the total visits recorded by all websites for Q3 2019. As such, any changes on its total visits isn't a clear representation of their improvement or decrease in performance when compared to previous periods.

Thank You For Reading!