Southeast Asia Cross-border E-commerce Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** E-Commerce Logistics & Warehousing (Logistics & Supply Chain)
> **Source:** https://www.mordorintelligence.com/industry-reports/southeast-asia-cross-border-e-commerce-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 50.37 billion
Projected Forecast (2031)	USD 50.37 billion
Growth Rate (CAGR)	10.97 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Southeast Asia Cross-border E-commerce industry](images/chart_2.png)

![Southeast Asia Cross-border E-commerce Market Size](images/chart_3.png)

![Southeast Asia Cross-border E-commerce Market Share by Business Model, 2025](images/chart_4.png)

![Southeast Asia Cross-border E-commerce Market Share by Product Category, 2025](images/chart_5.png)

![Southeast Asia Cross-border E-commerce Market Concentration](images/chart_6.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period
|

2020 - 2031
|

Forecast Data Period
|

2026 - 2031
|

Base Year Market Size (2025)
|

USD 45.39 Billion
|

Market Size (2026)
|

USD 50.37 Billion
|

Market Size (2031)
|

USD 84.74 Billion
|

Growth Rate (2026 - 2031)
|

10.97 %
|

Market Concentration
|

Medium
|

Major Players

*Disclaimer: Major Players sorted in no particular order

|

Market Overview

Southeast Asia Cross-border E-commerce Market Analysis by Mordor Intelligence

The Southeast Asia Cross-border E-commerce Market size was valued at USD 45.39 billion in 2025 and estimated to grow from USD 50.37 billion in 2026 to reach USD 84.74 billion by 2031, at a CAGR of 10.97% during the forecast period (2026-2031).

Rising disposable incomes, a growing base of 402 million digital consumers, and a rapid pivot toward mobile-first shopping continue to underpin demand. Tariff concessions under the Regional Comprehensive Economic Partnership (RCEP) are lowering average landed costs for Chinese and Korean goods, intensifying competition in electronics and beauty lines. Domestic e-wallet super-apps now power 70% of checkout value, streamlining payments across borders and stimulating higher ticket sizes. Bonded-warehouse logistics, supported by ASEAN customs transit protocols, are cutting intra-regional delivery times to under three days, reinforcing buyer confidence and repeat purchase rates.

Key Report Takeaways

* By business model, the B2C segment captured 78.12% of the Southeast Asia cross-border e-commerce market share in 2025. The Southeast Asia cross-border e-commerce market for B2B is projected to expand at a 8.99% CAGR between 2026-2031.
* By product category, fashion and apparel led with 29.95% of Southeast Asia cross-border e-commerce market revenue share in 2025. The Southeast Asia cross-border e-commerce market for beauty and personal care is forecast to grow at a 10.72% CAGR between 2026-2031.
* By sales channel, online marketplaces held 72.64% of the Southeast Asia cross-border e-commerce market share in 2025. The Southeast Asia cross-border e-commerce market for social commerce is advancing at a 19.74% CAGR between 2026-2031.
* By geography, Indonesia contributed 34.12% of the Southeast Asia cross-border e-commerce market's 2025 revenue. The Southeast Asia cross-border e-commerce market for Vietnam is set to grow at an 11.08% CAGR between 2026-2031.

Key Market Trends

Market Trends and Insights

Drivers Impact Analysis of Southeast Asia Cross-border E-commerce Market*

Driver
|

(~) % Impact on CAGR Forecast
|

Geographic Relevance
|

Impact Timeline
|

Domestic e-wallet super-apps (GrabPay, GCash, MoMo) accelerating cross-border checkout

|

+2.2%

|

Strongest in Philippines, Vietnam, Singapore

|

Medium term (2-4 years)

|

RCEP tariff cuts (4-8%) on Chinese & Korean goods

|

+2.8%

|

Most pronounced in Indonesia, Thailand, Vietnam

|

Medium term (2-4 years)

|

Video-commerce & live streaming converting social-media GMV

|

+1.7%

|

Indonesia, Thailand, Vietnam, Philippines

|

Short term (≤2 years)

|

B2B2C bonded-warehouse model cutting delivery to

|

+2.0%

|

Malaysia, Singapore, Thailand; benefits across
ASEAN

|

Medium term (2-4 years)

|

Buy-now-pay-later expansion among Gen-Z shoppers

|

+1.3%

|

Indonesia, Singapore, Philippines

|

Short term (≤2 years)

|

ASEAN Customs Transit System enabling
duty-suspended trucking

|

+1.1%

|

Cambodia, Laos, Myanmar, Vietnam

|

Long term (≥4 years)

|

Source: Mordor Intelligence
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Competitive Landscape

Competitive Landscape

The Southeast Asia cross-border e-commerce market displays moderate concentration. Shopee, Lazada, Tokopedia, and TikTok Shop jointly command the majority of aggregate GMV, creating economies of scale in advertising, payments, and last-mile delivery. Shopee’s hyper-localized campaigns and extensive courier alliances preserve leadership in Indonesia, Malaysia, and the Philippines.

TikTok’s USD 1.5 billion acquisition of a controlling stake in Tokopedia in late 2024 introduced a social-commerce engine into a mature marketplace framework. Monthly active users across the merged entity now eclipse 225 million, augmenting video-enabled discovery with proven logistics workflows. Lazada, backed by Alibaba, continues to expand bonded-warehouse capacity in Malaysia and Thailand, aiming to compress delivery windows to match domestic standards across ASEAN.

Niche disruptors such as WEBUY pioneer community-buying models that swap individual parcel shipping for consolidated bulk drops, trimming logistics expenses in suburban clusters. Payment service providers embed buy-now-pay-later options to amplify basket sizes, while AI engines personalize storefronts down to neighborhood-level demand profiles. Competition is thus shifting from pure scale toward integrated commerce ecosystems that blend content, credit, and fulfillment—an evolution that will shape investment flows into the Southeast Asia cross-border e-commerce market during the next five years.

Southeast Asia Cross-border E-commerce Industry Leaders

*

Shopee (Sea Ltd)

*

Lazada Group (Alibaba)

*

Tokopedia (GoTo)

*

Bukalapak

*

Qoo10 Pte Ltd

*

*Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

This market covers the value of online purchases where the seller is based outside the buyer country in Southeast Asia, and the order crosses at least one customs border before delivery. We treat the total as cross-border e-commerce value for physical goods bought via marketplaces or brand webstores.

Scope exclusions: Digital-only services and downloads, domestic e-commerce orders, and bulk wholesale freight movements not routed as e-commerce parcels are excluded.

Segmentation Container

* By Business Model
  * B2C
  * B2B
* By Product Category
  * Fashion and Apparel
  * Consumer Electronics

*
Home Appliances

*
Furniture

*
Beauty and Personal Care

*
Toys, Food and Others

*
Others

*
By Sales Channel

*
Online Marketplaces

*
Direct-to-Consumer (Webstores)

*
Social Commerce (Live, Chat)

*
By Country

*
Indonesia

*
Thailand

*
Vietnam

*
Philippines

*
Malaysia

* Singapore

* Rest of Southeast Asia

Frequently Asked Questions

What is the current size of the Southeast Asia cross-border e-commerce market in 2026?

It is valued at USD 50.37 billion in 2026.

How fast is the Southeast Asia cross-border e-commerce market expected to grow?

The market is forecast to register a 10.97% CAGR, reaching USD 84.74 billion by 2031.

Which business model leads the market today?

B2C transactions dominate with a 78.12% share of 2025 revenue.

Which sales channel is growing the fastest?

Social commerce, powered by live-stream and video-commerce formats, is advancing at a 19.74% CAGR through 2031.

Why is Vietnam considered the fastest-growing country market?

Strong manufacturing capacity, supportive trade agreements, and high mobile-commerce adoption propel Vietnam to an 11.08% CAGR.

What logistical innovation is cutting delivery times within ASEAN?

Bonded-warehouse hubs combined with the ASEAN Customs Transit System now trim delivery to under three days for intra-regional orders.