APAC E-commerce Snapshot Report

June 2025

Agenda

1. *Navigating Growth and Sensitivity in APAC Market*

- APAC, Global E-commerce Powerhouse
- Intensifying Headwinds Shifting Consumer Behavior
- Price Sensitivity is Rising – But So Are Digital Opportunities
- Beyond Price - What Really Drives Digital Purchases
- How APAC Markets Stack Up in Omnichannel Maturity

2. *Unpacking APAC's Digital Commerce Landscape*

- **APAC Digital Commerce Landscape**
- **Most Digitally Penetrated Categories** by Country
- **Top Growing E-commerce Categories** by Country
- **Let's Zoom In**: Category Highlights
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    - Shampoo
    - Instant Coffee
    - Toilet Paper
- **Brand Concentration Across Markets** - Top 3 Share by category
- **Where Trends Thrive**
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    - Beauty

3. *Eliminate Blind Spots: Unlock Growth with Smarter Data*

1. Navigating Growth and Sensitivity in APAC Market

APAC has firmly established itself as **a global e-commerce powerhouse**, accounting for over 60% of global activity. With both mature markets like China and South Korea and rapidly growing ones like Vietnam and the Philippines, the region is driving digital retail forward. Looking ahead, e-commerce is expected to make up 30% of FMCG sales by 2030 - solidifying APAC's leadership in the digital commerce.

4 of Top 10

APAC is home to four of the top 10 largest populations in the world.

62.6%

APAC accounts for 62.6% of global e-commerce[1].

5 of Top 10

Five of the top 10 e-commerce retail share markets are in APAC[1].

Highest Penetration

China has the highest e-commerce penetration globally, with more than 40% of FMCG sales coming from e-commerce[1]. South Korea is similarly advanced in e-commerce penetration

Fastest Growing

Philippines, Vietnam, Malaysia, and Thailand are among the top 10 fastest growing in e-commerce sales around the globe[1].

30% by 2030

E-commerce in APAC is projected to reach a 30% share of FMCG by 2030[2].

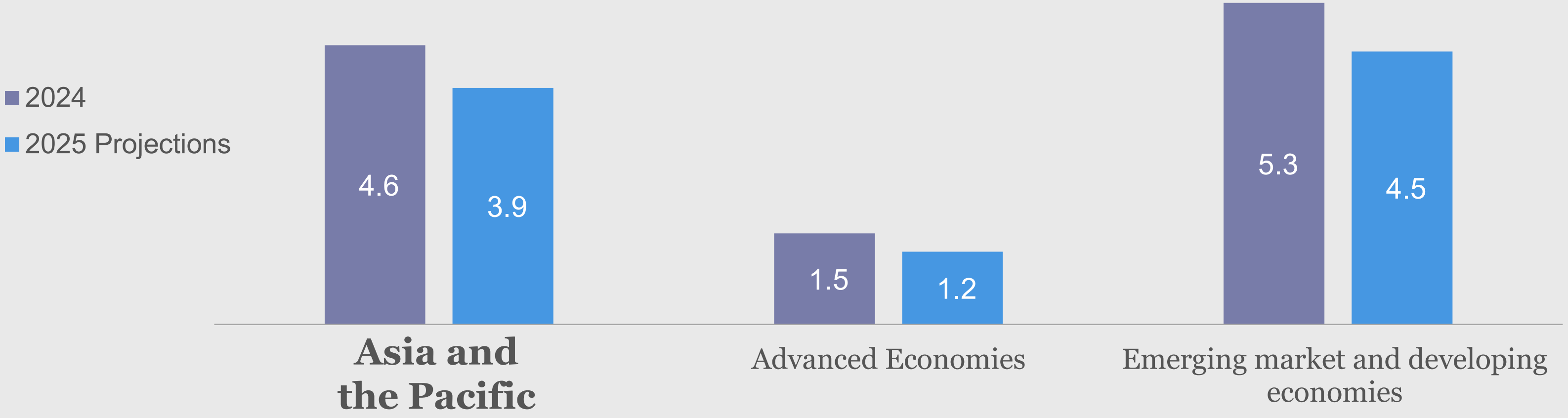
1) Insider Intelligence, eMarketer Forecast, Jan.2024 | 2) NIQ, GfK 2024 data, Forrester, Statista, Metric, Meti 2023 data | Find out more from The Ultimate Guide to Omnichannel

Despite APAC's strong digital momentum, 2025 brings intensifying headwinds. Inflationary pressures—already present in recent years—are persisting, while new risks like tariff ripple effects are emerging. These compounding factors are accelerating shifts in consumer behavior. As uncertainty grows, consumers are expected to reduce spending, seek lower-priced alternatives, or both. These shifts are not just theoretical - they're already visible in how people shop.

Economic Forecast: Asia and the Pacific [1)]

Real GDP growth: year-over-year percent change

2025 vs. 2024	***-0.7***	***-0.3***	***-0.8***
2025 Prediction change from Oct 2024	*-0.5*	*-0.8*	*-0.5*



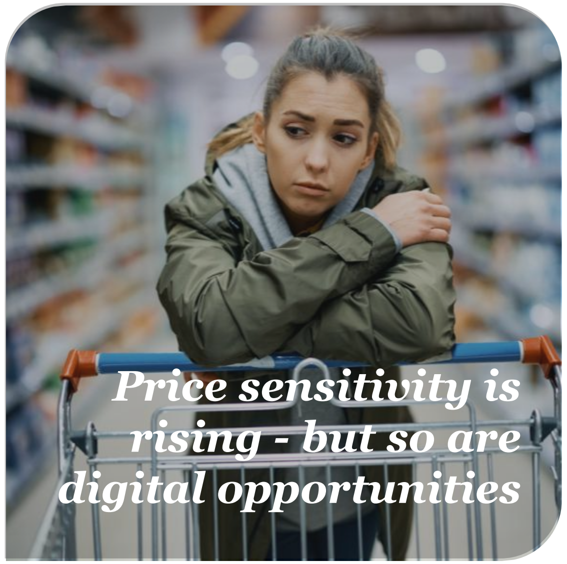
As the outlook worsens, how will consumers adapt?

1
Consuming less overall

2
Switching what they consume to lower-priced items

3
Some combination of these

1) IMF, April 2025



NIQ research confirms that consumers are already adjusting their behavior. In APAC, rising prices are the top concern heading into 2025. In response, people are actively seeking better value: shopping online for deals, switching to lower-cost options, and focusing on essentials.
This growing price sensitivity presents a clear opportunity for e-commerce platforms that can deliver affordability, convenience, and trust.

Top 3 concerns setting the spending tone for 2025 - APAC

1. Rising Prices 32%
2. Economic Downturn 22%
3. Increasing utilities costs 22%

Top 10 consumer saving strategies for CPG / FMCG – APAC

vs. global (%p)

Source: NIQ 2024 Mid-Year Consumer Outlook, APAC | Find out more from Consumer Outlook: Guide to 2025

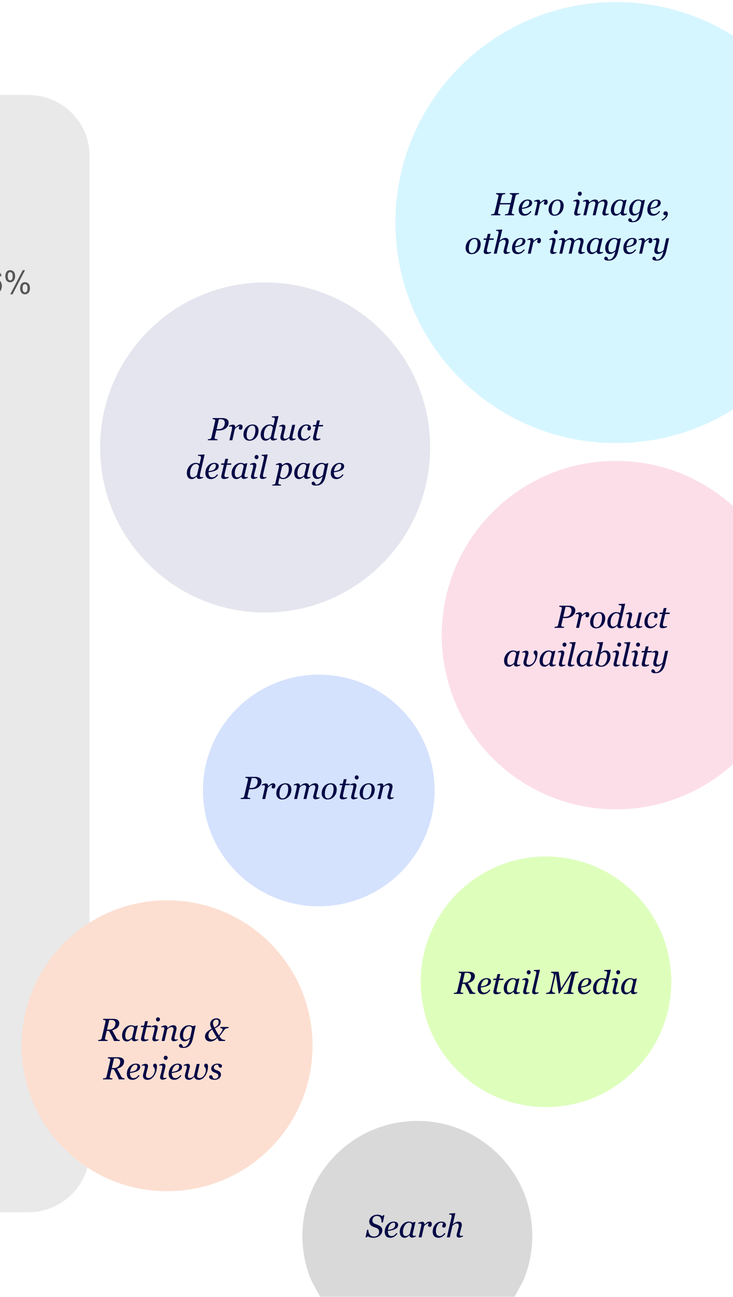
Beyond Price - What Really Drives Digital Purchases

While price remains a key factor, it's not the only one driving online purchases. Consumers also value convenience, availability, reviews, and the overall digital experience.

To unlock e-commerce growth, businesses must look beyond price and address the full range of digital touchpoints—search, product pages, imagery, ratings, and reviews.

To act on these insights, we now need to zoom in—because what matters most can vary significantly by market.

Why Consumers Choose to Shop Online

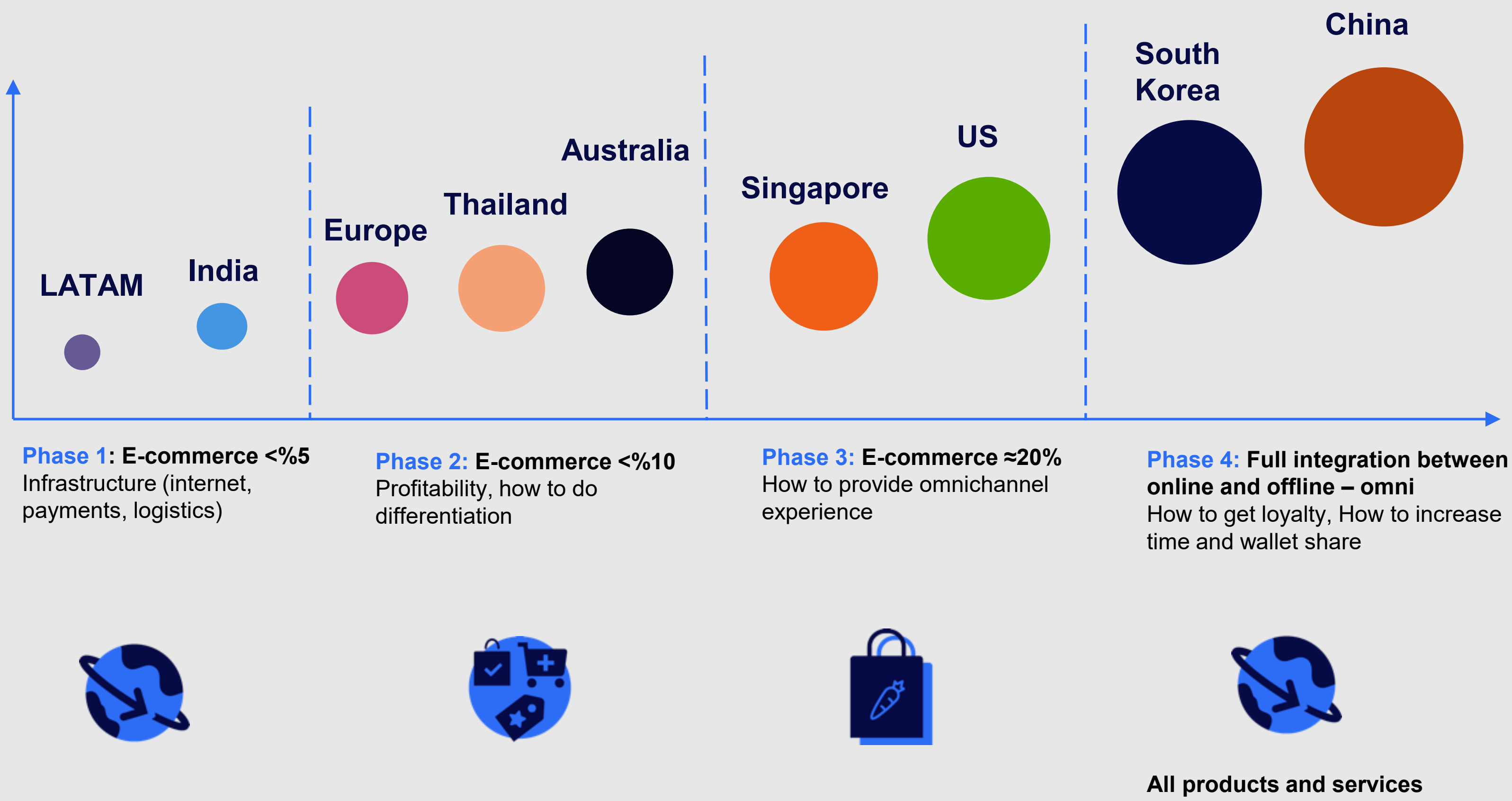


Source: NIQ APAC Omnichannel survey, Jun 2025 | Find out more from Where Click Meets Brick: APAC's Omnichannel Revolution Consumer Outlook and What is the digital shelf

We've seen the importance of digital touchpoints - but how those play out depends on where each market is in its journey.

In a region as diverse as APAC, country-level differences in omnichannel maturity matter more than averages. Understanding where each market stands—and learning from others at different stages—can help businesses identify opportunities and plan not just for today, but for what's next.

How APAC markets stack up in omnichannel maturity



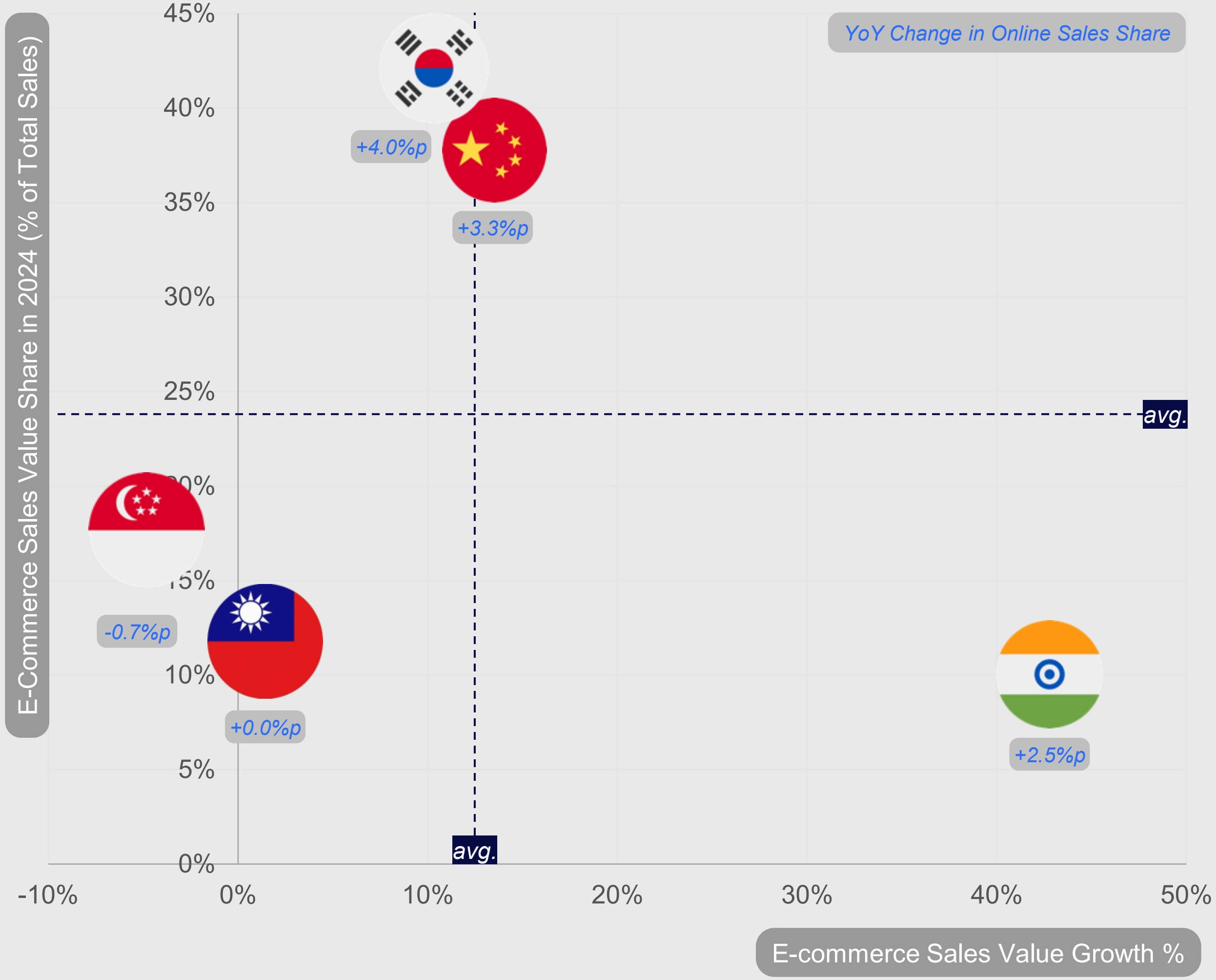
Source: [The Ultimate Guide to Omnichannel]

2.
Unpacking APAC's Digital Commerce Landscape

APAC FMCG Digital Commerce Landscape

- *India: H2 2023 vs. H2 2024; Others: Full-year 2023 vs. 2024*
- *Analysis is based on FMCG categories with available sales data for both online and offline channels.*
  - *China: 69 categories*
  - *India: 73 categories*
  - *Korea: 71 categories*
  - *Singapore: 121 categories*
  - *Taiwan: 62 categories*
- *Average: Unweighted 5-country average*

E-commerce Market Share x Market Growth



This analysis, based on FMCG categories, highlights the diverse digital commerce dynamics across Asia Pacific. **India** shows the fastest online value growth (+43%) but still has low online share (10%), signaling strong future potential. Meanwhile, **China** (38%) and **South Korea** (42%) maintain high digital importance with steady growth. In contrast, **Singapore** and **Taiwan** show stagnation.

These differences highlight the importance of market-specific approaches in APAC's diverse digital landscape.

Source: NIQ Omnisales, NIQ E-commerce

Most Digitally Penetrated Categories –
Insights from Multiple Countries

Based on each country's top 3 ecommerce categories by online sales value share in 2024

- *India: H2 2024;*
- *Others: 2024 Full-year*

> 90%	Pet Food	Vitamins	Roast & Ground Coffee
> 70%	Disposable Diapers	Infant Meal	Coffee Capsules
> 50%	Diapers	Coffee Beans	Pet Food
> 30%	Pet Food	Diapers	Health Food
< 30%	Hair Conditioners	Liquid Toilet Soaps	Olive Oils

This view shows what's driving digital adoption within each market.

In China, pet food and vitamins lead with over 90% online share, while in Korea, diapers and infant meals stand out for their high online penetration.—each reflecting local consumer priorities and digital readiness. Even in India, where total FMCG online share is just around 10%, categories like hair conditioners are nearing 30%.

By analyzing top categories across markets, brands can uncover digital whitespace and sharpen their e-commerce strategy with proven category-level success patterns from more advanced markets.

Source: NIQ Omnisales, NIQ E-commerce
Note: Pet Food data from some countries may not include sales from certain offline channels such as pet shops and veterinary clinics.

Top Growing Ecommerce Categories by Country

Based on YoY sales value growth in online sales

- *India: H2 2023 vs. H2 2024;*
- *Others: Full-year 2023 vs. 2024*

	China	South Korea	Singapore	Taiwan	India
#1	Hair Styling Products	Fabric Fresheners	Soft and Drinking Yoghurt	Pet Food	Chocolate
#2	Chewing Gum	Fabric Softeners	Edible Oils	Adult Nutrition	Soft Drinks
#3	Asia Traditional Drinks	Air Fresheners	Frozen Raw Meat	Face Care & Facial Cleansing	Refined Edible Oils

- > 50%
- > 30%
- > 10%
- < 10%

APAC markets show distinct category-level growth. China is seeing rapid online gains in hair styling and traditional drinks, while Korea shows strong momentum in home care like fabric fresheners.

India stands out, with all top three categories—chocolate, soft drinks, and refined oils—growing over 50%, signaling a surge in digital demand.

In Singapore and Taiwan, despite overall e-commerce stagnation, categories like yoghurts, pet food, and face care are still growing at over 10%, revealing pockets of opportunity.

So—is your category keeping up, or getting left behind?

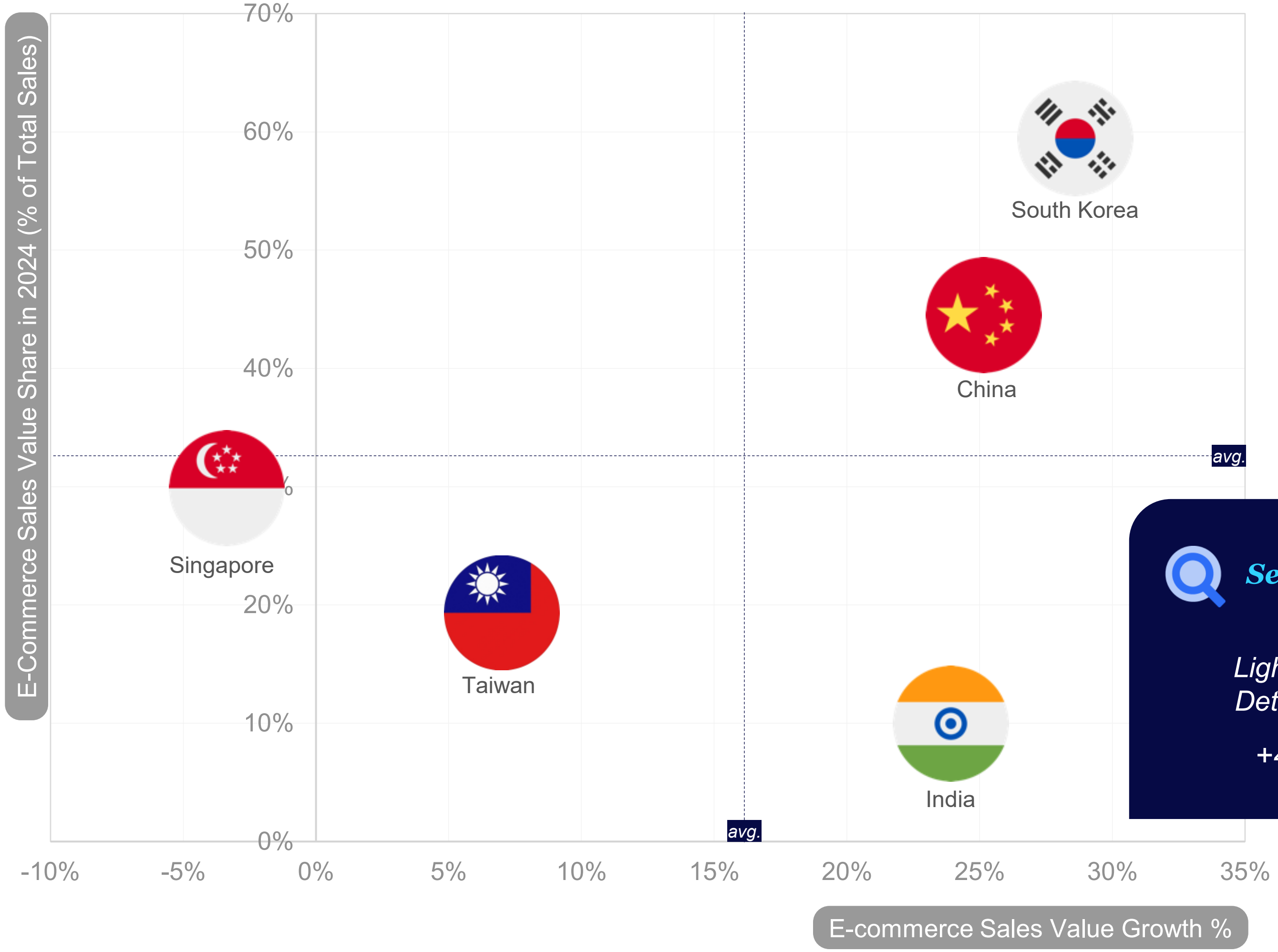
Source: NIQ Omnisales, NIQ E-commerce

Let's Zoom In:
What's Happening by Category?

Laundry Detergent

- *India: H2 2023 vs. H2 2024; Others: Full-year 2023 vs. 2024*
- *Average: Unweighted 5-country average*

E-commerce Market Share x Market Growth



South Korea and China lead with high online penetration (>40%) and strong growth, while Singapore shows negative growth despite moderate digital adoption. India's 24% growth from a low base (10% penetration) signals untapped potential.

Segment Level Highlight
Segment value growth

Light Duty Detergent	vs.	Powder Detergent
+46%		-26%

Source: NIQ Omnisales, NIQ E-commerce

NIQ

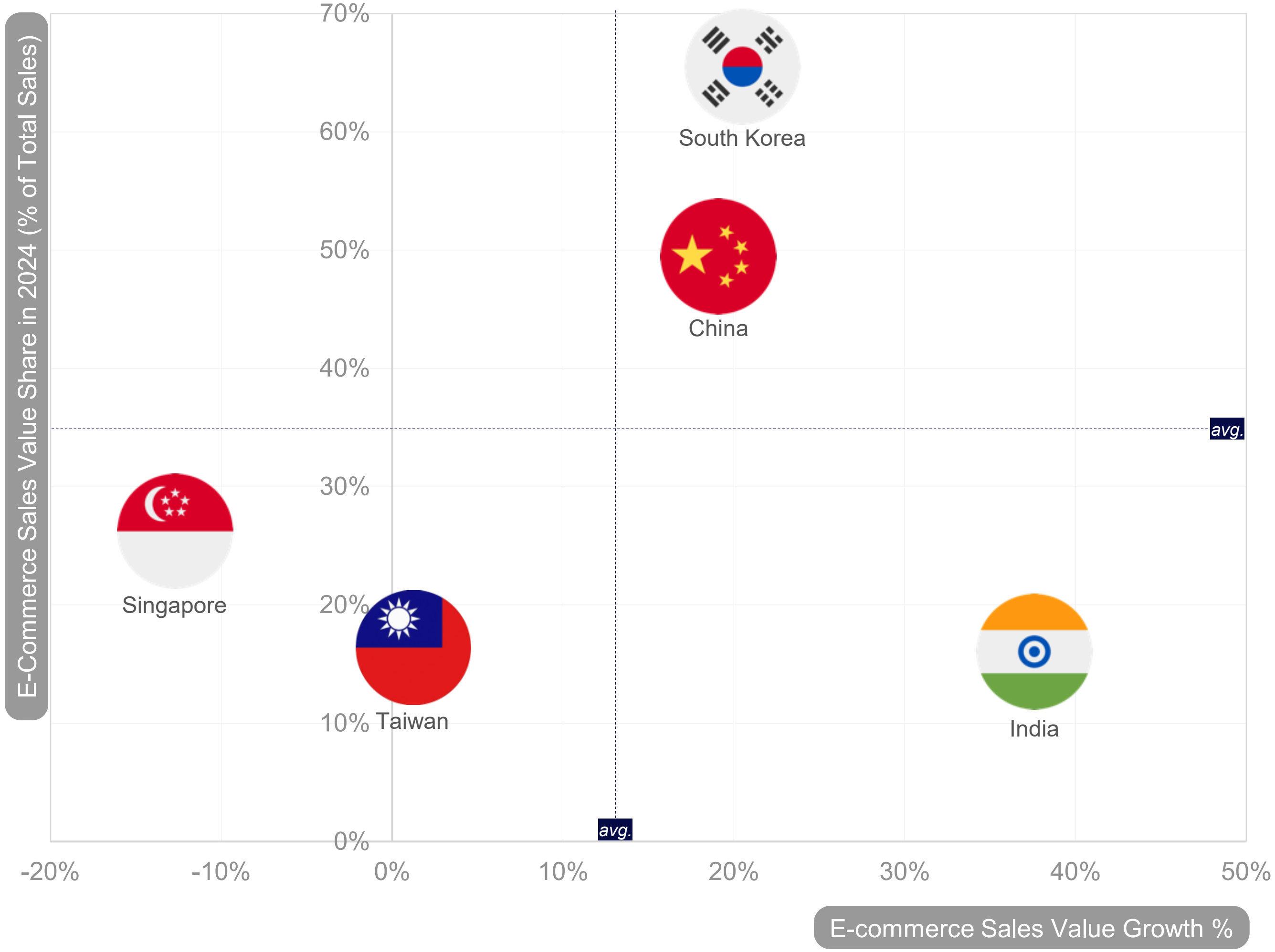
Let's Zoom In:

What's Happening by Category?

Shampoo

- *India: H2 2023 vs. H2 2024; Others: Full-year 2023 vs. 2024*
- *Average: Unweighted 5-country average*

E-commerce Market Share x Market Growth



India leads in growth (>30%) despite low online share, while Korea maintains high digital penetration.
Singapore's drop stands out and may indicate saturation or reduced demand across channels.
This contrast highlights the need to understand both digital behavior and total market dynamics.

Segment Level Highlight

Segment value growth

Hair Loss Segment

+24%

Source: NIQ Omnisales, NIQ E-commerce

Let's Zoom In:

What's Happening by Category?

Laundry Detergent

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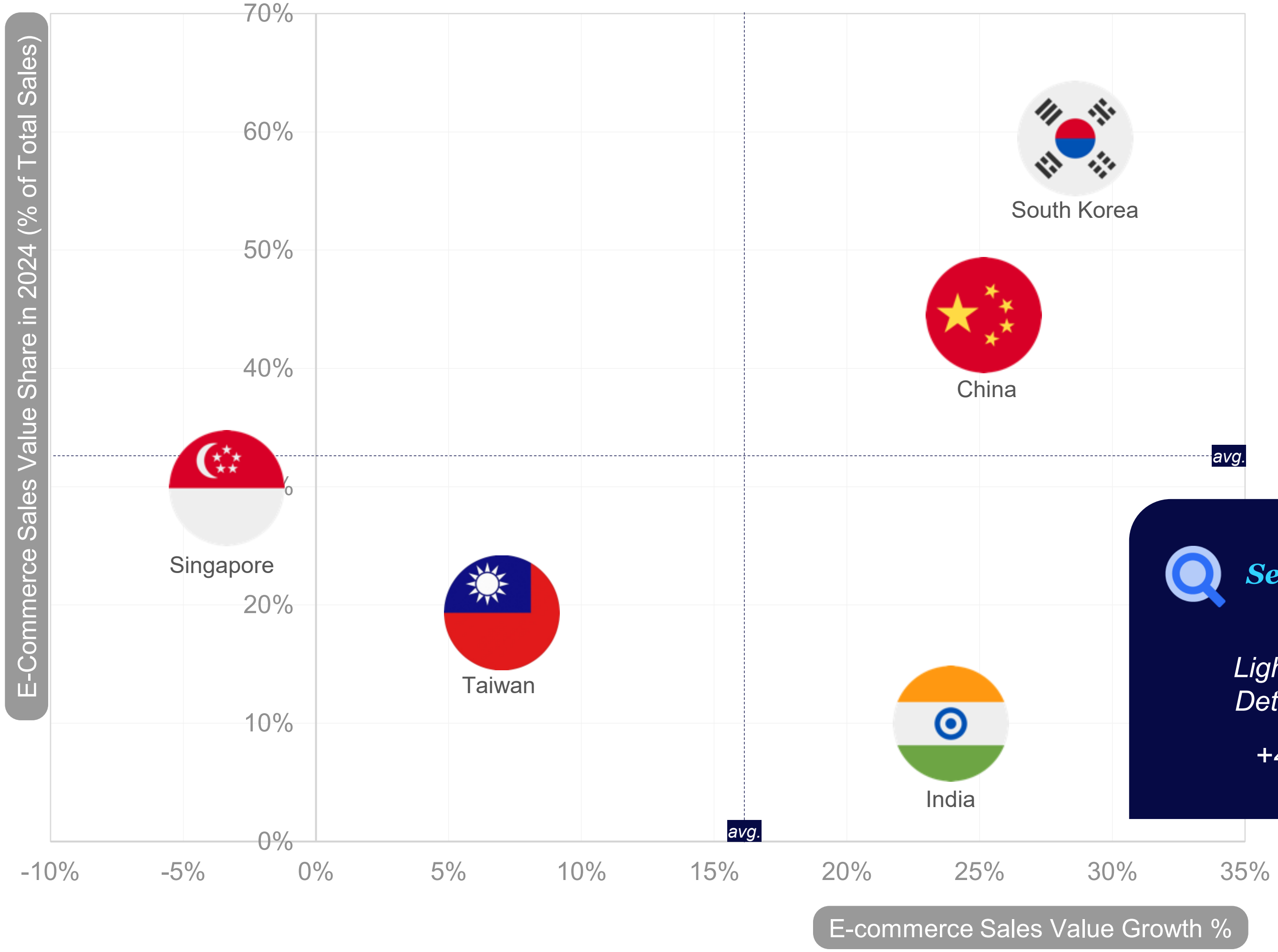
E-commerce Market Share x Market Growth



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NIQ

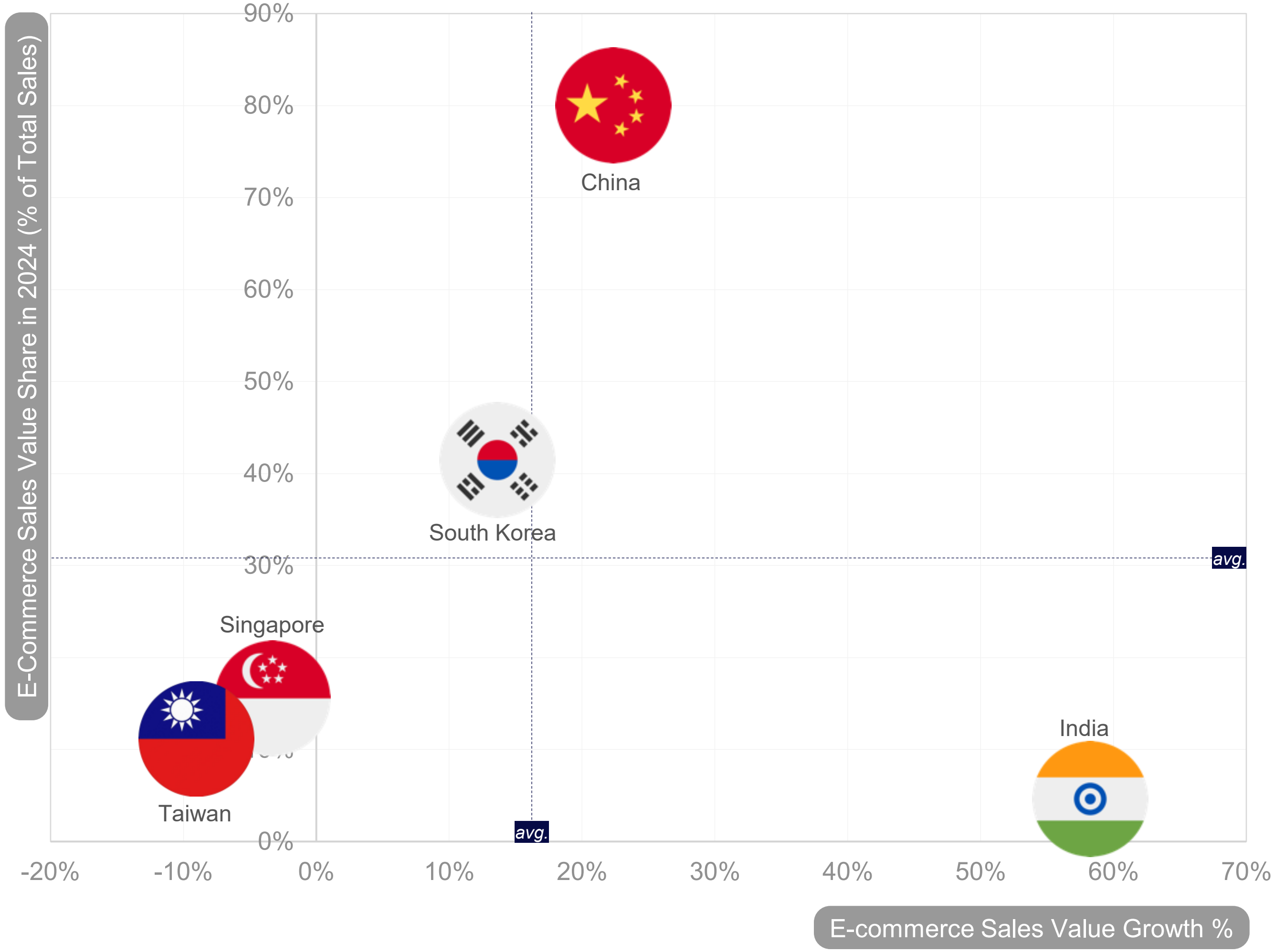
Let's Zoom In:

What's Happening by Category?

Instant Coffee

- *India: H2 2023 vs. H2 2024; Others: Full-year 2023 vs. 2024*
- *Average: Unweighted 5-country average*

E-commerce Market Share x Market Growth



China dominates with 80% online share, while India's >50% growth from a 5% base signals early-stage momentum. Singapore and Taiwan show declines, possibly reflecting broader consumption shifts. The category reveals both digital maturity and whitespace across markets.

Segment Level Highlight

Segment value growth

Convenience Pack	>	*Ground, Soluble, Capsule*
-1%		*-5%*

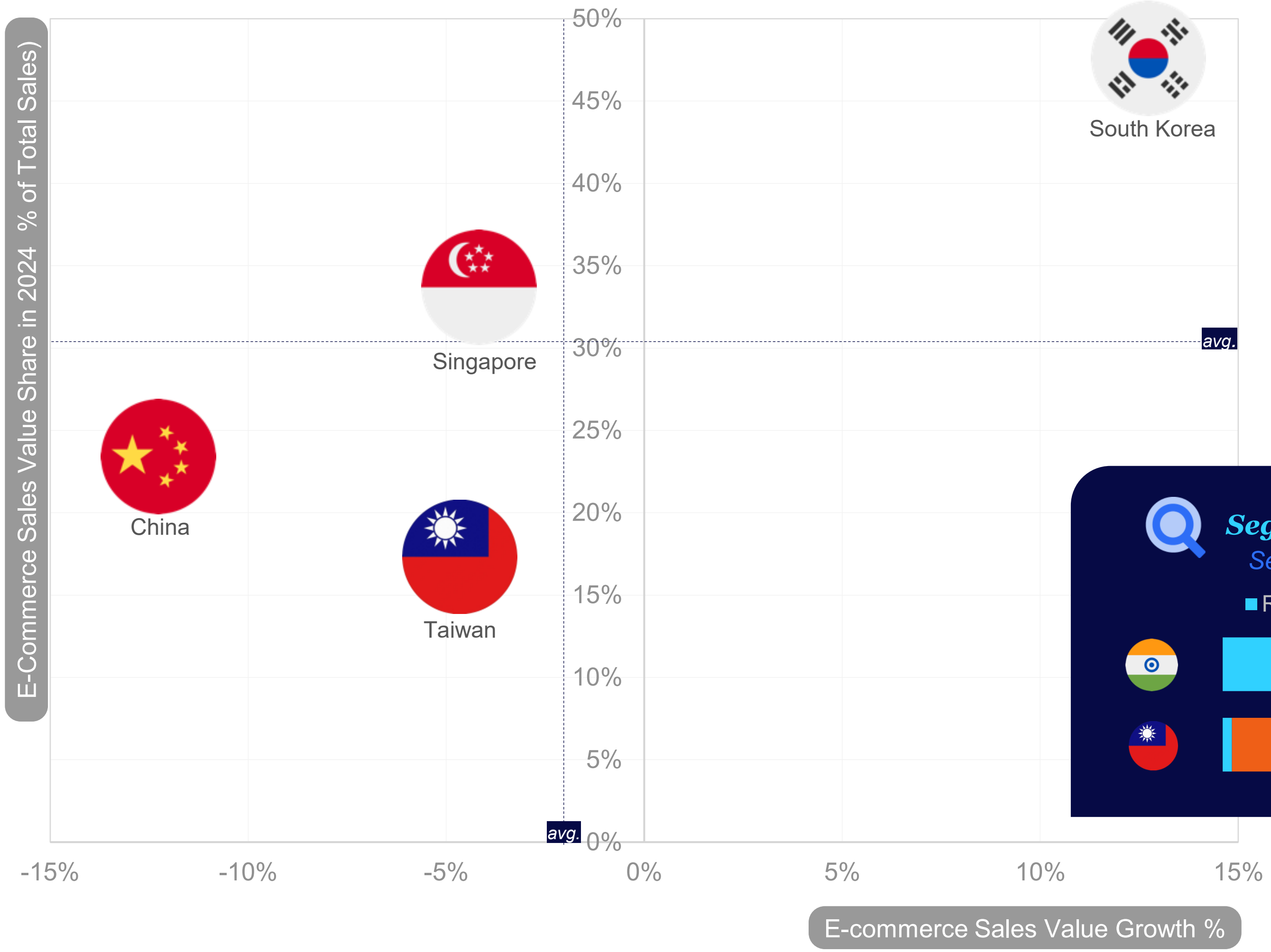
Source: NIQ Omnisales, NIQ E-commerce

Let’s Zoom In:
What’s Happening by Category?

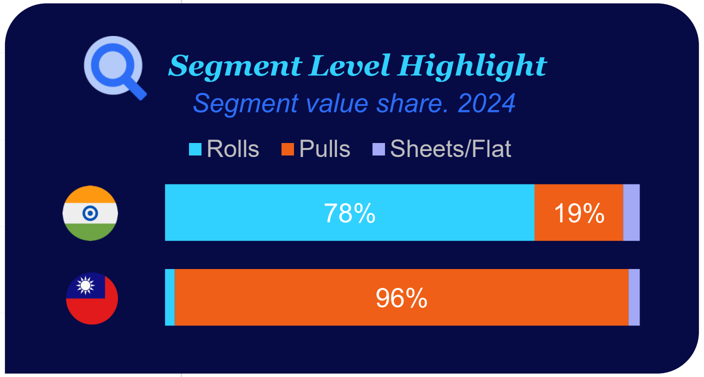
Toilet Paper

- *Full-year 2023 vs. 2024*
- *Average: Unweighted 4-country average*

E-commerce Market Share x Market Growth



Toilet Paper shows the lowest average growth among the four categories, even after factoring in India’s strong >20% sales growth. China saw a double-digit decline, while Taiwan and Singapore also posted negative growth. Despite moderate online share, the category remains under pressure across the region.



Source: NIQ Omnisales, NIQ E-commerce

Brand Concentration Across Markets –
Top 3 Share by Category

- *India: H2 2024;*
- *Others: Full-year 2024*

	China	South Korea	Singapore	Taiwan	India
Laundry Detergent	> 20%	> 20%	> 40%	> 40%	> 60%
Shampoo	Less than 20%	> 20%	Less than 20%	Less than 20%	> 20%
Instant Coffee	> 20%	> 60%	> 40%	> 40%	> 40%
Toilet Paper	> 40%	> 40%	> 60%	> 60%	> 60%

> 60% · > 40% · > 20% · < 20%

Brand concentration varies significantly by category, with Toilet Paper showing consistently high consolidation across all five markets.

In contrast, categories like Shampoo remain fragmented in most countries, suggesting more competitive and dynamic environments.

Understanding concentration levels helps businesses assess entry barriers, pricing power, and the need for differentiation in each category.

Do you have the granular visibility needed to pinpoint who leads your category—and who's quietly building momentum to outpace you?

Source: NIQ Omnisales, NIQ E-commerce

Where Trends Thrive -Pet Food

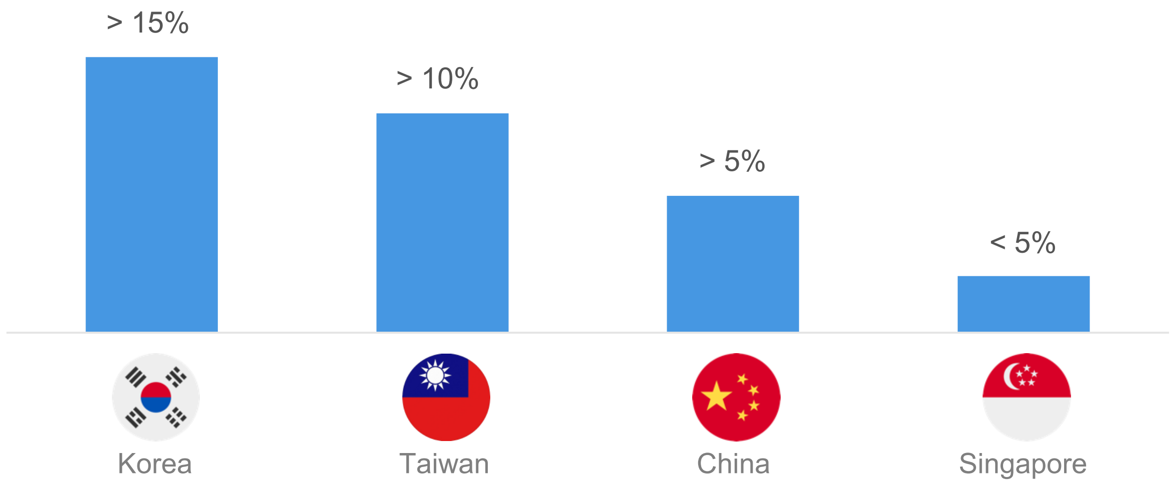
Pet Care continues to show steady e-commerce growth across APAC, with over 10% value growth in Korea and Taiwan, and close to 10% in China. Singapore also remains in positive territory, despite slower market momentum.

Amid financial concerns, pet owners are expected to continue increasing their average spend, prioritizing convenience, quality, and personalized products that reflect human lifestyle trends.

The category's steady growth and evolving consumer expectations make it a strategic priority for brands investing in omnichannel reach and relevance.

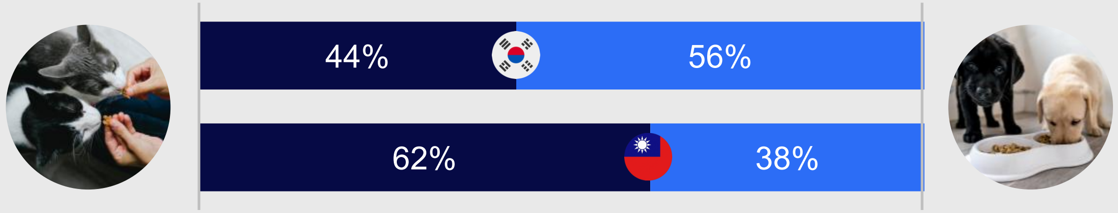
E-commerce Sales Value Growth – Pet Food

Value % change, 2023 vs. 2024



Segment Level Highlight

Cat Food vs. Dog Food - Value Share



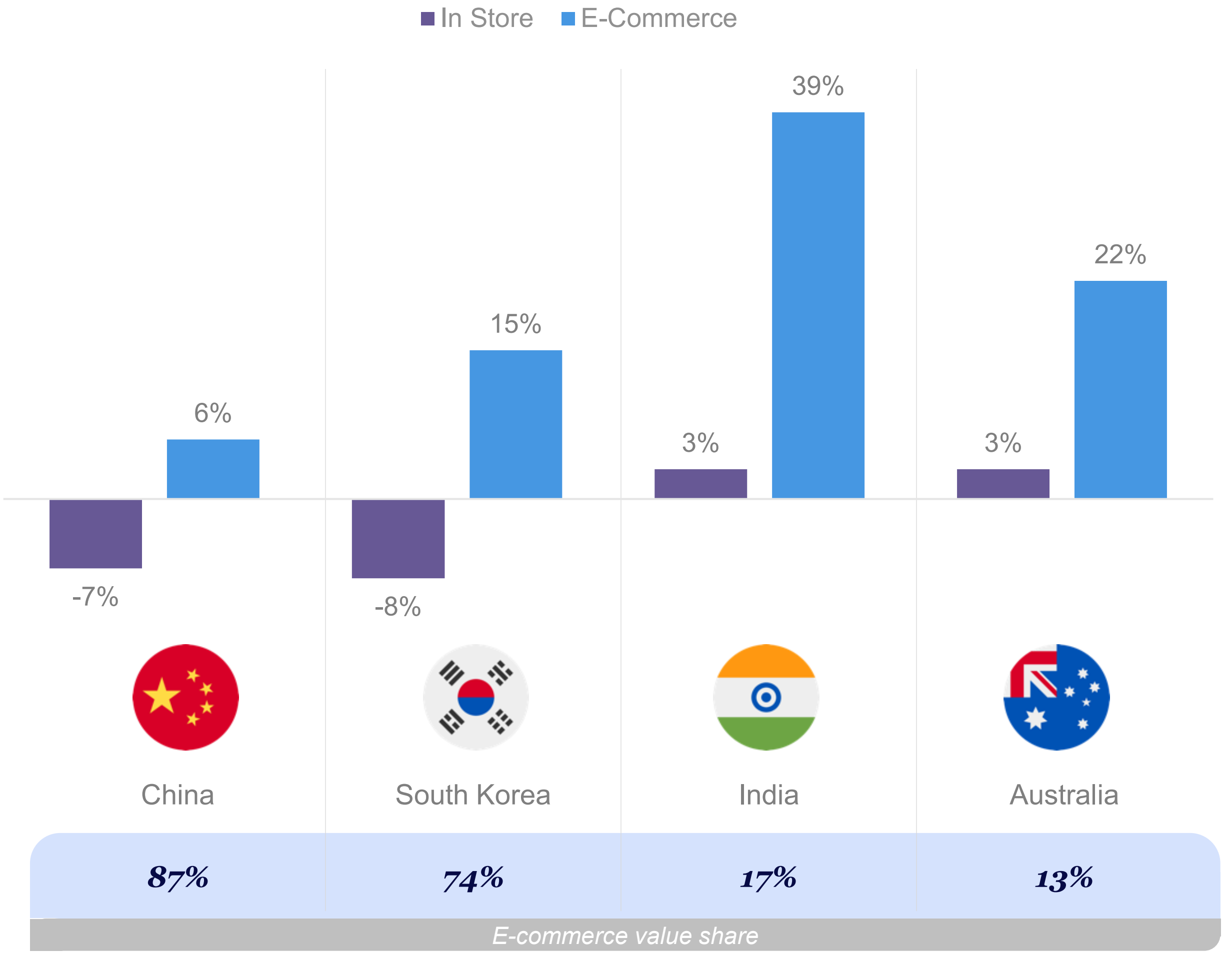
Source: NIQ Omnisales, NIQ E-commerce
Note: Pet Food data from some countries may not include sales from certain offline channels such as pet shops and veterinary clinics.

Where Trends Thrive - Beauty

Asia Pacific is leading the global shift in beauty e-commerce, with online channels consistently outperforming offline growth. In 2024, the region's overall beauty market grew by +3.7%[1], but digital platforms like TikTok Shop are driving real momentum—where Health & Beauty are top-selling categories. In India, prestige beauty is leading the digital curve, with 55% of online beauty sales coming from premium segments[2], highlighting the strength of e-commerce in high-value categories. In China, Douyin ranks as the top online beauty retailer[3], underscoring the strategic role of social commerce. As consumers increasingly favor frequent, smaller online purchases, a strong omnichannel strategy is essential for brands navigating this fast-evolving landscape.

Sales Value Growth – In Store vs. E-commerce, Beauty[4]

MAT Q3 2024 vs. YA



1) NIQ QBN RMS Beauty MAT Q3 2024 / Value % growth vs. YA (unweighted) / Beauty = Hair, Skin, Fragrance, Cosmetic & Nail
2) 3) Find out more from: [The Global Beauty Edit: A retail roadmap taking you from complexity to competitive advantage – NIQ]
4) NIQ Omnisales, NIQ Omnishopper, NIQ ecommerce – MAT Q3 2024 | Find out more from [The Global Beauty Edit: Seeking Balance for Growth in 2025 – NIQ]

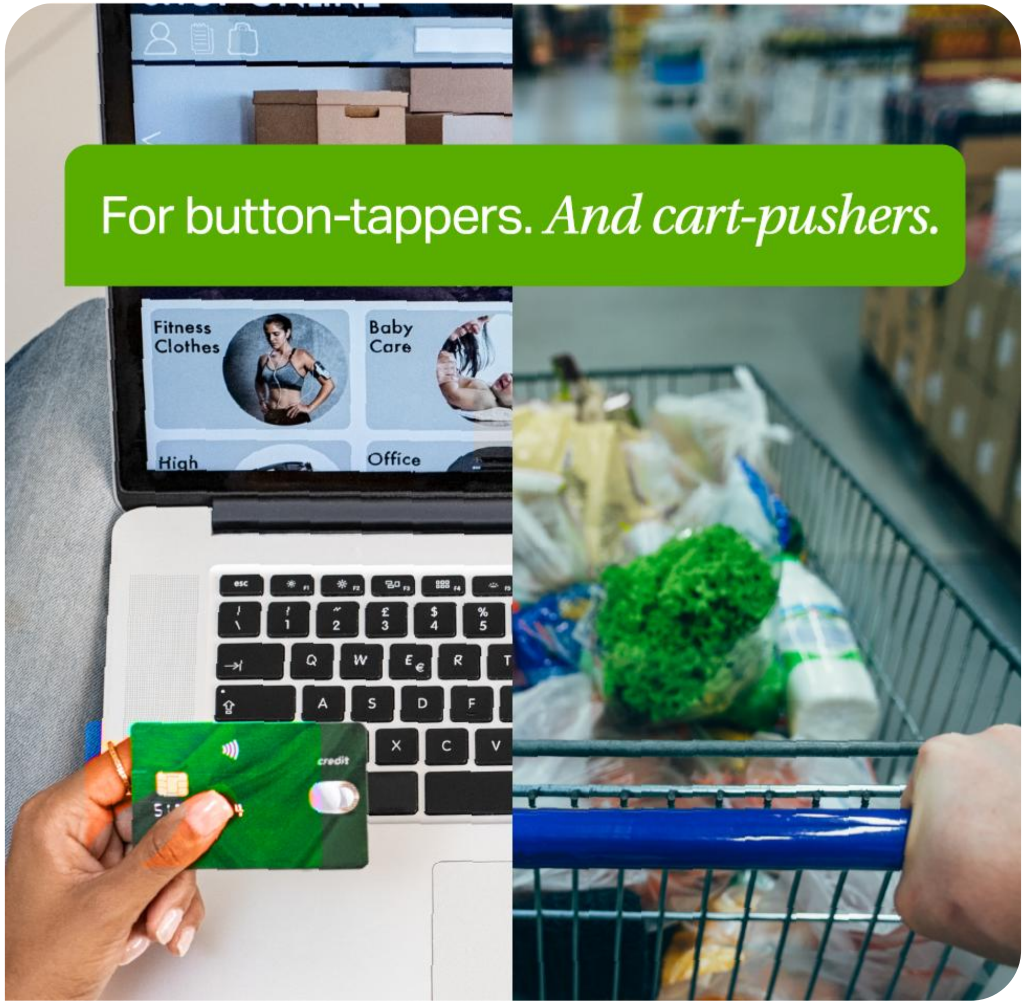
3.

Eliminate Blind Spots: Unlock Growth with Smarter Data

Businesses must connect the dots to eliminate blind spots

To fully understand their customers, businesses must be able to connect online & offline activity. From brick-and-mortar browsing to online purchasing to stores for curbside pickup. Obtaining and analyzing comprehensive data like this can be expensive and unwieldy. But without it, you risk losing visibility of where people shop, what they buy, and why they buy it.

The omnichannel revenue opportunity is huge. Can you afford to miss out?



NIQ's Digital Commerce Suite gives you *the Full View*™

What is happening

What consumers search, click & buy.

Why it's happening

Tie online causals to purchase.

What to do about it

Optimize availability, spend & assortment for every item & shelf.

The best in class have the data to see more: they see *what*, *why* and *how* consumers buy

World-class companies see shoppers from every angle – enabling them to make better decisions

What if…

your view of sales and share was more accurate, and was easily ingestible into your data set?

What if…

you could see numbers for *all* channels, on and offline, including specialized retailers like TikTok Shop?

WHAT THEY BUY

+

What if…

you could see detailed shopper profiles by channel, like demographics, precise habits, and media consumption?

What if…

you understood shopper behavior more accurately by channel, so you could tailor strategies for different channels?

WHY THEY BUY

+

What if…

you had the data and insights to tailor and optimize your visibility strategy, by channel and retailer?

What if…

you could see exactly how to optimize your content to convert the shoppers you need?

HOW THEY BUY

The data to see the full picture:

✓ **Performance vs competitors**

✓ **Shopper behavior that impacts performance**

✓ **How to improve performance**

We call this new approach the Full View™

Shift from siloed e-commerce data to a true omnichannel picture

Siloed e-commerce data, limited view

- In-store and online measurement & insight are separate
- Amazon sales data is hard to integrate with other data sets
- Sales, behavior and channel aren't linked
- Item-level insights are hard to identify
- The best course of action is difficult to pinpoint

Full View™: true omnichannel picture of today's consumer

OMNI-FIRST	Full measurement and tracking across all channels True omni-shopper panels, not just online
UNIVERSAL	Amazon data using UPCs integrated into reporting Hourly refreshes to capture Amazon algorithm updates
CORRELATED	Consumer behavior & insights side by side Sales, share & shelf together in one
ANALYTICAL	Location-based, AI-powered analytics Optimized distribution, marketing and availability
ACTIONABLE	Prescriptive analytics tools to drive action Right message to the right buyer in the right channel

Note: Solution availability may vary by country. Please contact your local NIQ team for further information.

Get the Full View™ with the NIQ Digital Commerce Suite

NIQ Digital Commerce Suite

Click the solution names for more details →

NIQ Omnisales

- **See** performance across categories, channels and global markets
- **Measure** all online channels: stores, apps, social
- **Measure** competitors online and in-store
- **Optimize** distribution, availability and search

WHAT THEY BUY

NIQ Digital Purchases

- **Access** more granularity on in-store and online behavior for better marketing
- **See** what and where consumers buy
- **Know** online consumers' interests
- **Track** online consumer trends

WHY THEY BUY

NIQ Digital Shelf

- **Optimize** distribution, marketing and product availability
- **See** search trends
- **Boost** item ranking & page performance
- **Tailor** content to searches
- **Manage** the digital shelf at store-level

HOW THEY BUY

Integration

Most integrated across existing data/systems

Data quality

Most complete, most accurate, and most granular in the market

Localization

Location-based capabilities supported by AI search optimization

True omnichannel solution, built on the ***Retail Measurement Services*** data you trust

Note: Solution availability may vary by country. Please contact your local NIQ team for further information.

Explore Availability Across APAC and Accelerate Your E-commerce Success

	NIQ Omnisales	*NIQ Digital Purchase*	*NIQ Digital Shelf*
Australia		● (omni-shopper)	●
China	●		●
Hong Kong		●	●
India	●	●	●
Indonesia	●	●	●
Malaysia		●	●
Philippines		●	●
Singapore	●	●	●
South Korea	●		●
Taiwan	●		●
Thailand	●	●	●
Vietnam	Coming in Q2 2026	●	●

1) Omni Shopper

NIQ

Looking for a smarter way to see **the Big Picture - Fast?**

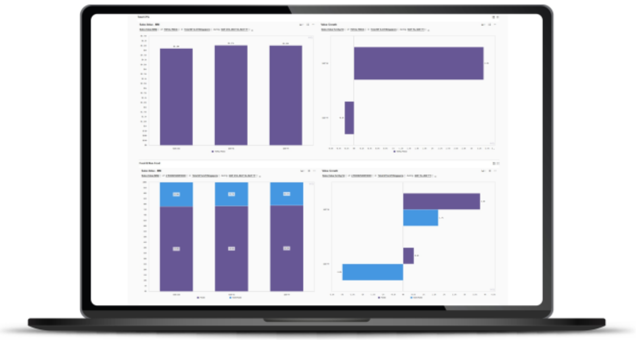
E-commerce Market Information Digest

E-Commerce Market Information Digest

- **Understand** market dynamics at a glance
- **Analyze** performance trends in your selected categories
- **Benchmark** your brand against top competitors
- **Optimize** your strategy with channel-level insights
- **Explore** brand growth opportunities in adjacent categories

Your gateway to APAC E-commerce Intelligence

Get the latest market insights that help you understand, compare, and act with confidence



The data you need is ready—and so is your next win.
See what's available by country, category, and insight type.
Click here to explore.

Thank you

If you have any questions, please visit **our webpage**, click the '**Contact us**' or '**Talk to an expert**' button, and submit your inquiry. A local expert will get in touch with you shortly.

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