BRIDGING GLOBAL BRANDS TO 2 BILLION CONSUMERS

天猫国际 Lazada

桥接全球品牌
面向20亿消费者
TMALL GLOBAL’S OPPORTUNITIES AND PROGRESS
Big Market & New Opportunities of China’s Import Consumption

Leading Consumption Economy
中国已经成为全球消费大国

Largest Importer of Cross-Border E-commerce Goods
中国已成为全球最大进口电商消费国

Increasing Import is Strategically Important to China
国家级战略，坚持扩大进口

Note:
But Import Consumption Online is Still at an Early Growth Stage

进口消费仍处于起步阶段

Source: iResearch, 2018;
No.1 Import Platform in China
天猫国际是中国最大进口平台

25,000+ Brands
(2)

5,100+ Product Categories
(3)

92 Countries & Regions
(4)

Notes:
2. Number of brands on Tmall Global as of Mar 2020.
3. Number of product categories on Tmall Global as of Mar 2020.
4. Number of origin countries and regions of brands registered on Tmall Global as of Mar 2020.
**Accelerating Penetration**
全面渗透中国进口消费者

**Post-90s**
Post-90s
55%
of Import Consumers

**Getting Younger**
90后新生代进口消费崛起

**Consumers from**
Consumers from
Less developed areas
42%
YoY

**Penetrating into Less Developed Areas**
低线城市进口消费崛起

**Notes:**
1. Percentage of consumers of Tmall Global born after the 90s as of July 31, 2019.
2. YoY growth of number of consumers of Tmall Global in less developed areas for the 7-month period ended July 31, 2019.
Consumption Trend
天猫国际的进口商品盛宴

Daily Necessities
进口生活必需品
- Cosmetics
- Personal Care
- Health Care
- Baby Formula

Diversified Lifestyle Products
多样化的进口生活方式
- Anti-hair Loss
- Beauty Supplements
- Men's Skin Care
- Fine Porcelain
- Kitchenware
- Pet Food
- Maternity Care
- Trendy Shoes
Global Brand Incubator

New Brands
300% YoY (1)
Growth in number of new brands
入驻增速16Y 300%

Strategic Partnership
86% YoY (2)
Growth in number of brand partnerships
建立战略合作关系的品牌同比增长86%

100M Club
80+ (1)
Overseas brands reaching RMB 100M GMV
年度海外亿元俱乐部品牌增长至80+

Notes:
1. YoY growth of new brands onboarded for the 7-month period ended July 31, 2019.
2. YoY growth for number of strategic partners for the 7-month period ended July 31, 2019.
3. Number of Tmall Global brands with more than RMB100 million GMV, for transactions of the twelve months ended July 31, 2019.
案例 – 泰国品牌 参加 2020年 618 活动
Showcase – Thailand brands, 618 event at 2020

Thansetetakij.com: Thai Brands and Products Shine in Tmall 618 Mid-Year Shopping Festival
https://www.thansetetakij.com/content/439659

Positioningmag.com: Thai brands and products gain attention in Tmall 618 Mid-Year Shopping Festival
https://positioningmag.com/1285002

Prachachat.net: Durian-flavored whey protein and other Thai products succeed during Tmall 618 Mid-Year Shopping Festival   https://www.prachachat.net/ict/news-481965

“士国”燕窝
“Scotch” Birdnest

和

“我的”蛋白粉
“Fitwhey” Protein
案例 – 马来西亚品牌 参加 2020年 618 活动
Showcase – Malaysia brands, 618 event at 2020

正典燕窝，618期间20天有30万客户到访网店; P.T. swift, participated many sales events from Tmall platform, including 618 in 2020. Within 20 days, we receives nearly 300,000 customers visit.

老街场咖啡，618期间销售显著增长; Old Town Coffee, in less than three years, during the 2020 Tmall 618 carnival, the sales volume of 618 increased by 130% year-on-year, and the traffic growth by about 50% year-on-year, which once again broke through the historical achievements and won the love of consumers.
Harnn Showcase – Thai Harnn, Launched at 2020, July

Harnn, launched in the middle of July, 2020, within 4 days, receives nearly 2,000 customers visit and sales over 50,000 RMB, still in rapid increasing development.
Wel-B, Enfant (Thai Wacoal), Baybee launched in 2020 July, Aggregate the industry effect of the mother and baby brand from Thailand, gradually build the brand awareness and "Made in Thailand" as quality guarantee among China customers.
案例 – 其它天猫国际平台的东南亚品牌
Showcase – Other SEA labels’ flagship store at Tmall Global
China coffee market is in a stage of rapid development, the market size of coffee was around RMB 70 billion in 2015, accounting ~0.5% of the global market. The annual growth rate of coffee consumption in China is about 15%. It is estimated that the sales scale of China’s coffee market will reach 300 billion RMB in 2020, and it is expected to exceed 1 trillion RMB in 2025.

From Tmall data 2019-2020: Tmall entire coffee category saw a 80% increase in search volume during the epidemic, and a 50% to 60% increase in sales volume. After the epidemic, it achieved a growth of over 100%. Coffee consumption has become more diversified, and the coffee capsule, coffee drip bag and coffee liquid sachet has shown significant increase on the market awareness. The consumption scale of these new generation packaged coffee increased by more than 200%, and the per capita consumption reached a rapid growth of more than 80%.

Quoted: CBNdata, 2020线上咖啡市场消费者洞察报告; 2020 DATA100 Insight, "唤醒"沉睡的消费者——咖啡市场趋势洞察
中国咖啡市场发展
Coffee market in China

即溶咖啡
Instant Coffee

挂耳咖啡
Coffee Drip Bag

液体咖啡
Coffee Liquid

胶囊咖啡
Coffee Capsule
In 2019, the overseas bird nest processing companies registered with China CNCA (Certification and Accreditation Administration of the People's Republic of China) have increased from 56 to 59, including 34 Malaysian bird nest product processing companies (33 edible processing companies + 1 bird nest beverage processing company), 23 Indonesian bird's nest product processing companies Enterprises (All are edible processing companies) and 2 Thai bird's nest product processing companies (both are edible processing companies).

The China Bird Nest Traceability Management Service Platform by CAIQ (Chinese Academy of Inspection and Quarantine) was launched on December 25, 2013. As of the end of 2019, the number of platform users has risen to 10,884, including domestic and foreign bird's nest manufacturers, importers and distributors. According to platform data, 183.2 tons of edible bird's nest and 21.5 tons of bird's nest beverage were imported in 2019, and the import volume of edible bird's nest increased by 73.3% year-on-year.
China Bird Nest Market Development

**TRENDY HOT ITEM**
Low Temp. Instant Bird Nest

**HERO PRODUCT**
Dry Processed Bird Nest

**FAST MOVING, HIGH VOLUME**
Instant Bird Nest

Products are Natural, share similar characteristic. Brand differentiation does matter!
How to start bird nest business with Tmall Global:

**Instant Bird Nest**, not require CAIQ certification; as long as your products fulfill the origin’s Food Safety regulation and can provide the standard shipping documents (Country of Origin, Veterinary Certificate etc.), you can sell your product at Tmall Global platform through Cross-border e-commerce. The generated sales will directly wire to the paired Indonesian bank with Global Alipay Service.

**Dry Processed Bird Nest**, the product must be processed by a CAIQ certified company; however the brand owner is not limited to the CAIQ member list. Any merchants whom is willing to develop the Dry Bird Nest business in China, they can register an Oversea Trademark then tailor made their products from the list of CAIQ approved companies. If the merchant has a china partner to work with, they can use the general trade route import to the China. Or the merchant can operate the e-commerce business through a Oversea Legal Body, e.g. Indonesia Registered company, through the Cross-border e-commerce and have the generated sales will directly wire to the paired Indonesian bank with Global Alipay Service.

Quoted: CAIQ, 2019年度进口燕窝发展报告
Comprehensive Infrastructure
Superior Shopping Experience

2.4 days from ordering to receiving
Fulfillment time from bonded warehouse is similar to domestic purchase

完善的基础设, 优质的海购体验

签约入驻
备货生产
海外提货
出口清关
干线运输
进口清关
进入保税仓
物流配送
STRENGTHEN AND UPGRADE GREATER IMPORT ECOSYSTEM

布局进口生态，全面推动大进口升级
Helping Brands Enter China

天猫国际帮助海外品牌进入中国

- Cross-border (跨境电商)
  - Entry Requirement (准入门槛)
  - Low
  - Overseas Entity (海外实体)
  - Product Standard From Country of Origin (原产地标准)
  - Customs Record for Entering (海关备案制)

- General Trade (大贸)
  - Entry Requirement (准入门槛)
  - Medium
  - China Entity (中国实体)
  - China Import Standard (中国进口标准)
  - General Trade Procedure (一般进口清关)

- Domestic Trade (国内流通)
  - Entry Requirement (准入门槛)
  - High
  - China Entity (中国实体)
  - Made in China (中国生产)
  - Domestic Sale Policy (国内流通政策)
Collaborate with Multinational Companies to Introduce and Incubate Popular International Brands

Speedy Onboarding and Ecosystem Enablement for International Boutique Brands

Accelerating Brand Expansion in China
天猫国际加速全球品牌在中国市场成长

Marketing Partner
Content Partner
Operation Partner
Data Partner
One-stop Platform for Cross-border E-commerce

灵活高效的库存管理
Strong distribution channel / brand building

从海外仓发货
From Overseas Warehouses

从保税仓发货
From Bonded Warehouses

从本地仓发货
From Domestic Warehouses

天猫海外仓直购
Tmall Overseas Fulfillment

天猫国际直营
Tmall Direct Import

天猫国际平台
Tmall Global Open Platform

大进口集采
Centralized Import Procurement

天猫国际平台
Tmall Global Open Platform

天猫国际平台
Tmall Import

天猫国际平台
Tmall Overseas Fulfillment

天猫国际平台
Tmall Global Open Platform

天猫国际平台
Tmall Import
Global Warehouse and Fulfillment Network
Enabling Effective Inventory Management

Note: The average delivery time from Tmall Overseas Fulfillment warehouses in each region from July 1, 2019 to July 31, 2019.
TMG TOF Store Reference: https://tof.tmall.hk/
Synergistic Solutions

强分销渠道

直接进口

品牌建设基座

天猫国际平台

天猫全球超市

Beauty & Health

Mother & Baby

Fashion

Home

Model Upgrading

数据赋能

协同营销

平台

直接进口

天猫国际

数据赋能

天猫全球超市

Beauty & Health

Mother & Baby

Fashion

Home

模式升级

市场趋势分析

协同营销

天猫国际平台

天猫全球超市

Beauty & Health

Mother & Baby

Fashion

Home

数据赋能

协同营销

天猫国际

天猫全球超市

Beauty & Health

Mother & Baby

Fashion

Home

模式升级

市场趋势分析

协同营销
TMG Flagship Store Reference:
For example, **Ellips**;  https://ellips.tmall.hk/
Global Joint Procurement Platform

Big Data-driven Category Planning

Global Joint Procurement Platform

北美洲

南美洲

欧洲

非洲

亚洲

大洋洲

 centralized import procurement

大进口集采

consumer

online

Offline

Big Data-driven Category Planning

大数据品类规划
Synergies Across Alibaba's Greater Import Ecosystem

阿里进口生态协同

Note:
1. Not a consolidated business of Alibaba Group.
A NEW ADVENTURE IN SOUTHEAST ASIA

东南亚市场的新机遇
Southeast Asia: Most dynamic region in the world, backed by strong fundamentals and growing rapidly

<table>
<thead>
<tr>
<th>SEA in 2018…</th>
<th>… with one of the fast-growing middle-class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combined GDP</td>
<td>GDP Growth</td>
</tr>
<tr>
<td>$2.7T</td>
<td>5.2% Real GDP growth forecast (2018-2022)</td>
</tr>
<tr>
<td>Population</td>
<td>Consumption</td>
</tr>
<tr>
<td>650M</td>
<td>$2,875 Annual consumption expenditure per capita in 2020</td>
</tr>
<tr>
<td>Youth Population</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>45.3%</td>
<td>$25B Infrastructure investments in SEA under OBOR</td>
</tr>
<tr>
<td>Between 20 to 49 years of age</td>
<td></td>
</tr>
<tr>
<td>Internet Penetration</td>
<td>E-commerce</td>
</tr>
<tr>
<td>55.0%</td>
<td>$102B Market size est. for 2025; 20x higher than $5B in 2015</td>
</tr>
</tbody>
</table>

Southeast Asia: Most dynamic region in the world, backed by strong fundamentals and growing rapidly.
Southeast Asia: Booming digital economy, forecasts continuously revised upwards

2025:
E-Commerce market size

- ID: $88B
- MY: $88B
- PH: $102B

ID: 1.2
MY: 1
PH: 1.5
SG: 1.5
TH: 0.4
VN: 0.5

Forecasted growth rates for 2015-2025:
- ID: 41%
- MY: 21%
- PH: 34%
- SG: 18%
- TH: 30%
- VN: 43%
Cross-Border Categories Recommendation

Singapore: Beauty, Health, Fashion
Malaysia: Beauty, Health, Fashion
Thailand: Fashion, Sports, Digital
Indonesia: Health, Beauty, Fashion
Philippines: Beauty, Fashion, Digital
Vietnam: No HK/Korea LGS to Vietnam
For more information, please visit
merchant.tmall.hk

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Francis Chow
at Dintalk (钉钉)

THANK YOU