



ECOMMERCE IN ASEAN

What can we do to accelerate growth?

Max Bittner, CEO

Indonesia

Malaysia

Philippines

Singapore

Thailand

Vietnam

Lazada Group overview

Celebrating our 5th anniversary in March 2017

COMPANY OVERVIEW

- **The leading** online shopping and selling destination in Southeast Asia
- **Widest** footprint in the region
 - Launched in 5 markets in March 2012: Indonesia, Malaysia, the Philippines, Thailand and Vietnam
 - Launched in Singapore in May 2014
 - Headquartered in Singapore
- One-stop shop to access ~39 million products, sourced locally and internationally, across more than 15 categories
- Created an **end-to-end ecosystem** enabled by **best-in-class logistics** and payment capabilities
- Backed by the world's largest retail commerce company – Alibaba Group
- Acquired online supermarket RedMart in Singapore in Q4 2016



LAZADA PRESENCE



Consumer demand is driving product choices

Over 39 million products from more than 15 categories

**A wide assortment of products of about 39 million SKUs from more than 15 categories
From electronics to lifestyle; a one-stop shop.**



Automotive & Gadgets



Groceries



Sports & Outdoors



Baby & Toddler



Watches, Sunglasses
& Jewellery



TV, Audio/ Video
Gaming, Gadgets



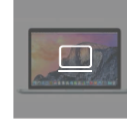
Media, Music & Books



Fashion



Toys & Games



Computers & Laptops



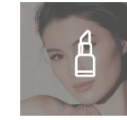
Cameras



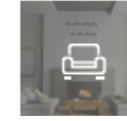
Mobiles & Tablets



Travel & Luggage



Health & Beauty



Home & Living



Home Appliances

What is behind an online marketplace?

Connecting brands & sellers to 560 million Southeast Asia consumers



~55,000

Active seller partners

1,000+

Brand partners

Category	Sample Partnerships	Recent Partner and Press Quotes
Electronics 	 	<p>"Lazada is Samsung's strategic online partner to win in South East Asia across Smartphones, TV, Accessories and Home Appliances given their nationwide reach, diverse payment solutions and integration with Alibaba" (Samsung Electronics, President, South East Asia & Oceania)</p>
Home 	 	<p>"With Robinson's & Lazada partnership more & more Filipinos will enjoy Robinson's Appliances through effortless + risk-free e-com"²</p>
FMCG (H&B, TKB) 	 	<p>"Unicharm sees e-com as key driver for growth in SEA for Mamy Poko. Lazada is our key partner as they provide nationwide free delivery & access to variety of payment options" (Unicharm CEO TH)</p>
Fashion & Accessories 	 NEW LOOK	<p>"...While we continue to expand our b&m stores, Lazada will help us reach out to more consumers so they can enjoy hassle-free Penshoppe shopping wherever, whenever" (Penshoppe CEO)</p>

Complex geography

Need for sophisticated logistics network



~ 5000
Fleet size



112
Last mile
distribution hubs



14
Fulfillment centers



Almost 100%
Geographic Coverage
in 6 markets



~ 80
3rd Party Logistics
Partners

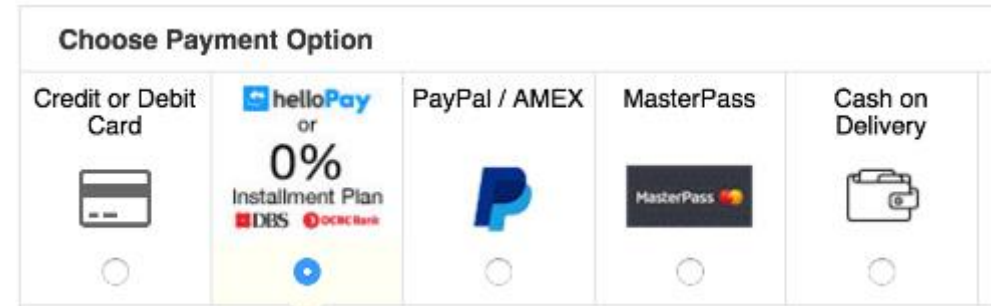


10
Sortation centers

Diverse markets need diverse payments

Meeting customers' needs for flexibility and convenience

- Unsophisticated, with a significant of the payments through cash
- Approximately **70%** of residents do not have access to traditional banking services
- Credit Card penetration in some markets is below **5%**
- To offer the best online shopping experience, Lazada offers multiple payment methods:
 - Cash on Delivery
 - Credit/Debit Card
 - Paypal/AMEX
 - MasterPass
 - HelloPay



eCommerce is booming in Southeast Asia, driven by consumers

Southeast Asia's E-Commerce market to surpass US\$25 billion by 2020 despite market challenges, finds Frost & Sullivan

NEWS PROVIDED BY
Frost & Sullivan
Aug 31, 2016, 02:41 ET

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Southeast Asia is the next e-commerce wonderland: DHL eCommerce CEO Charles Brewer

Globally, online sales represent approximately 9 per cent of retail sales whilst in Asia it is over 10 per cent, so Asia is a significant market for the company, says Brewer

By Saimul Abudheon K

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Clash of e-commerce titans in South-east Asia



SOUTHEAST ASIA, LAZADA OFFER BIG POTENTIAL, SAYS ALIBABA'S TSAI

TOM BRENNAN | MAY 24, 2016



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Survey: E-commerce poised for growth

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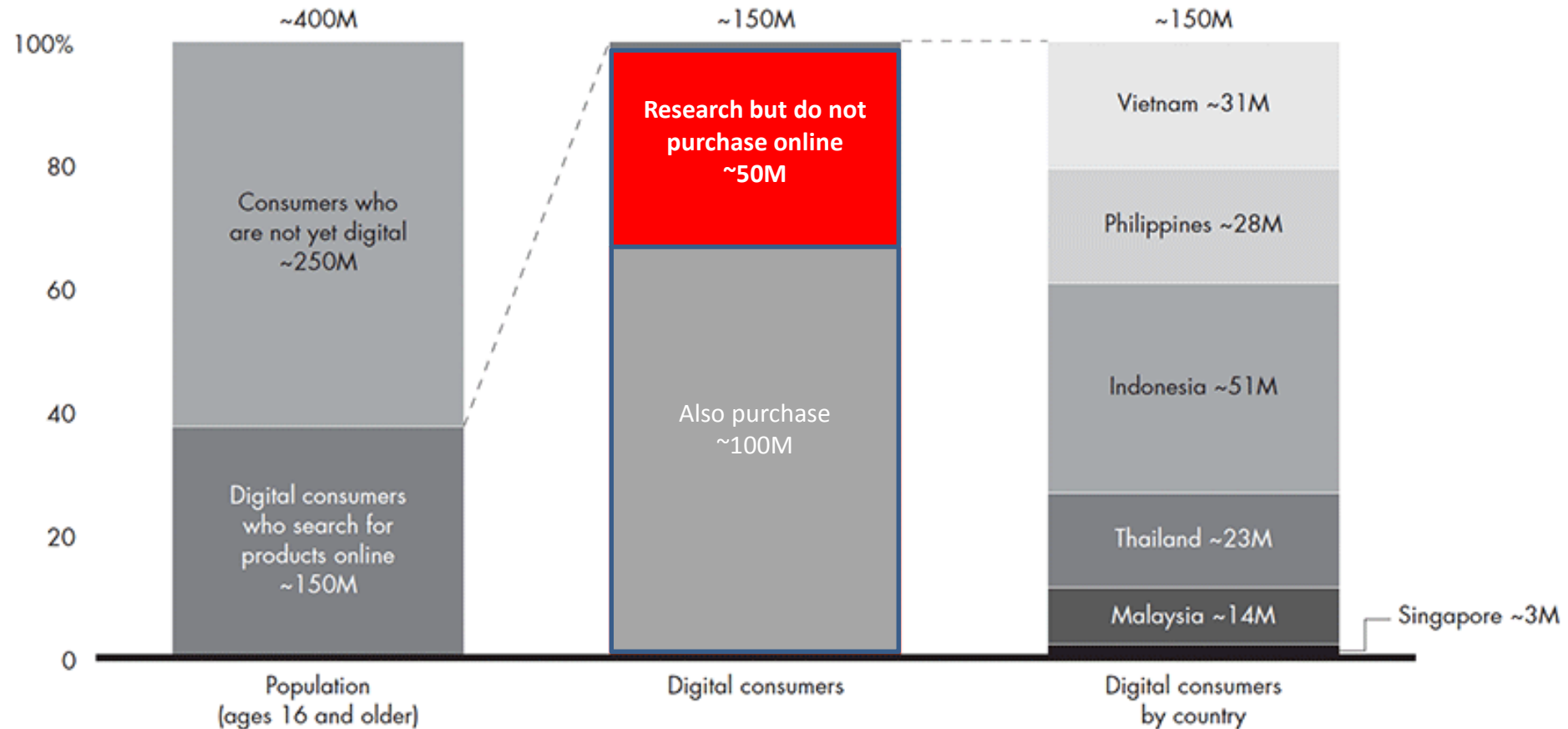


FIND ACCOMMODATION AROUND THAILAND, EMBASSY CONTACT, TRAVEL SERVICES & REVIEWS

FIND COMPANIES & SUPPLIERS

50 million consumers haven't purchased online yet

Untapped eCommerce opportunities

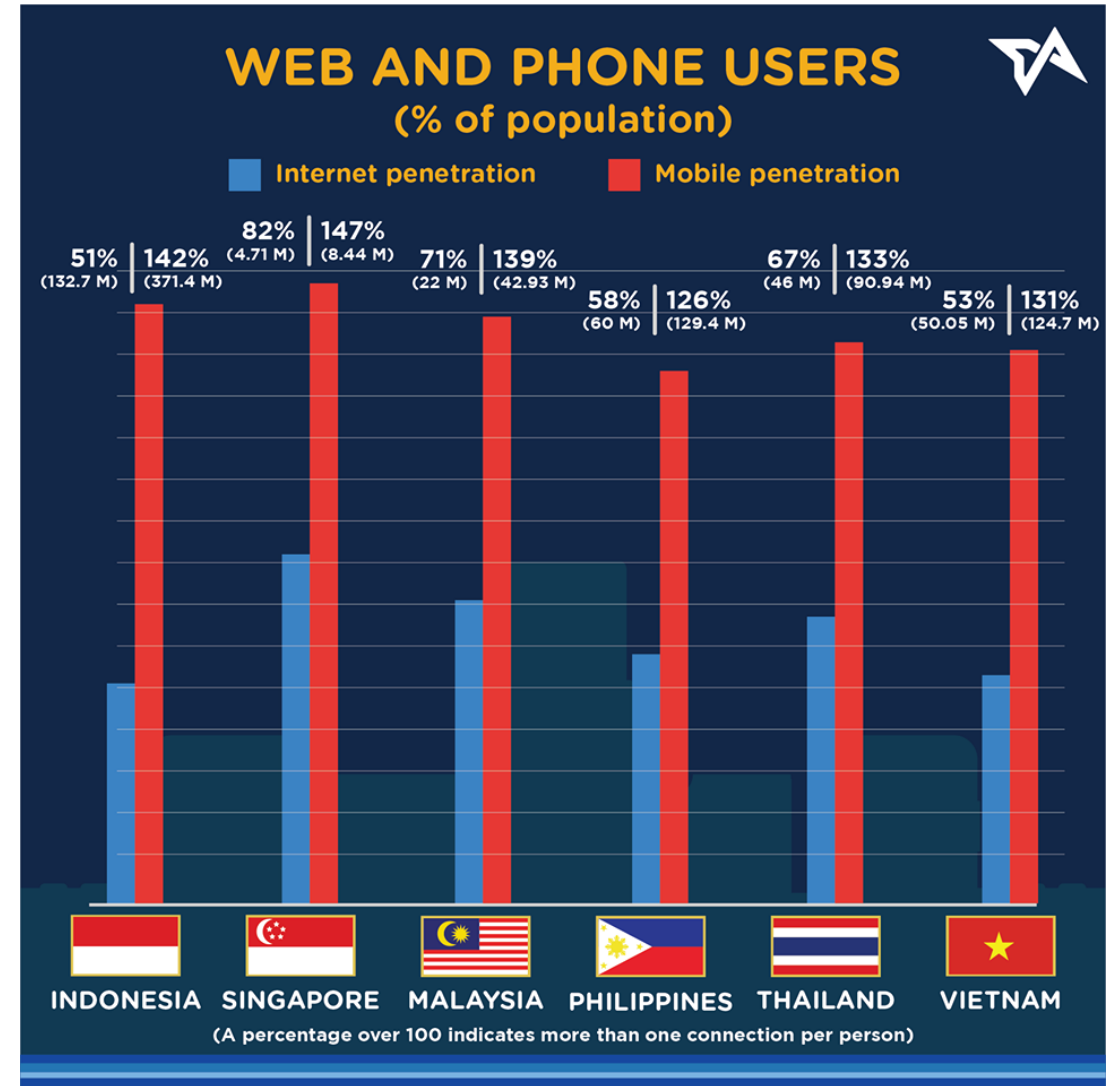


Notes: We define digital consumers as those who are 16 years old or older and who researched products or services online in at least two categories; we define "also purchase online" as digital consumers who purchased products or services online in at least two categories
 Sources: Bain Southeast Asia Digital Consumer Survey, November 2015 (n=6,278); Bain analysis; Euromonitor

And a significant portion of consumers are on mobile

A mobile-first market

- The 6 markets in which Lazada operates in, enjoy more than 100% mobile penetration rate, higher than the global average



Consumers are starving for international products

Lazada Group crossborder

Facilitating easier flow of goods into Southeast Asia

One-stop solution for sellers to access six markets

Superior logistics capabilities enable Chinese merchants to drop off their parcels at the LGS sortation center in Shenzhen

