

Lazada Captures Southeast Asia's Quality-Led Momentum as Authenticity-Driven ECommerce is Set to Hit US\$150 Billion by 2030

- *Cube Asia study reveals that authenticity-driven eCommerce, anchored in trusted Mall environments like LazMall, has surged from 12% in 2020 to 30% in 2025, and is projected to reach 55% of total eCommerce by 2030.*
- *Released in conjunction with the LazMall Brand Gala 2025, this new report reinforces Lazada's brand-led strategy and the platform's growing 170,000-strong brand ecosystem.*

[SINGAPORE, 25 NOVEMBER 2025] Lazada, Southeast Asia's leading eCommerce platform, today announced the findings of a regional survey, commissioned from Cube Asia. The report "*The rise of virtual mall ecosystems in Southeast Asia*" reveals that the region's eCommerce landscape is rapidly transitioning towards authenticity-driven, quality-first shopping experiences. The survey results reaffirm **Lazada's brand-led strategy** at this year's [LazMall Brand Gala](#), where the company celebrated its 170,000-strong brand ecosystem. The strategy positions the platform to meet the needs of evolving consumer preferences to capture the market potential for authenticated, trusted eCommerce.

The survey, which polled **6,000 consumers across six Southeast Asian markets** in Singapore, Malaysia, Indonesia, Thailand, the Philippines and Vietnam, reveals that **90% of online shoppers are now actively engaging with Mall environments**, a shift that reflects their increasing demand for trusted, quality products and reliable service. This demand is driving an unprecedented growth trajectory for authenticity-driven eCommerce.

Lazada's Brand-Led Strategy Taps Into Burgeoning US\$150 Billion Market Potential

The study found that authenticity-driven eCommerce, defined as brand goods purchased through authorised Mall environments, has grown rapidly from **12% of total eCommerce sales in 2020 to 30% in 2025**, now representing **approximately US\$40 billion** in market size. By 2030, this segment is projected to reach **55% of SEA eCommerce retail**, valued at **around US\$150 billion in sales**.

This shift in consumer preferences aligns with Lazada's strategy to lead the industry's transition from mass, low-trust marketplaces to quality-led commerce anchored in LazMall, the region's largest ecosystem of genuine brands, official stores, and authorised distributors.

Lazada's strategy has also been further validated by its recent results from the mega sale events:

- **Million-dollar GMV brands surged 53% since 9.9**, proving the platform drives tangible results.
- **During 11.11, LazMall brands achieved a 39% GMV increase, with 11% YoY growth in LazMall buyers**, demonstrating a clear shift toward trusted, high-quality brands.

- **Average revenue per user (ARPU) grew 70%, with buyer penetration at 65%,** demonstrating Lazada's ability to attract and retain premium shoppers.

The Rise of Mall Consumers and Premiumisation of Purchases

The study revealed that SEA consumers are increasingly intentional and brand-conscious when they shop:

- **86%** of respondents are active Mall shoppers, defined as consumers who have made at least 20% of their online purchases from online Mall stores in the past three months
- **90%** are willing to pay more for brand goods in a trusted Mall environment, underscoring the "trust premium" that consumers place on these products
- **31%** would pay **10–30% more** for authenticity and assurance

Countries such as Thailand and Vietnam recorded Mall shopper penetration of over 90%, with Indonesia and the Philippines close behind at around 80%. Here, trust signals such as 'reviews and ratings' and 'authenticity' have become key purchase drivers.

Trust, Quality, and AI-Powered Experiences as Core Engines Driving the ECommerce Surge

The report identifies three key dynamics that will fuel the rise of authenticity-driven eCommerce, each one aligned with Lazada's strategic priorities:

1. Widening quality product assortment to bridge the supply gap

Over **80%** of consumers report facing supply constraints when searching for authentic branded products. At the same time, **80%** are willing to try new or overseas brands when preferred brands are unavailable, and **91%** have discovered overseas brands that exceeded expectations.

Here, platforms like Lazada are expanding the assortment of authentic and premium brands, ensuring that consumers can easily access what they are seeking.

2. Omnichannel integration to drive purchasing decisions

The study shows **73%** of consumers engage in showrooming (visiting stores to try items in person, inspect quality or seek staff advice before purchasing online), especially in categories where LazMall is strongest, namely Beauty, Electronics, and Lifestyle.

Lazada's investments in online-to-offline omnichannel integration, brand partnerships, and experiential retail give shoppers seamless pathways from discovery to purchase.

3. AI as the Copilot for Quality-Focused Shoppers

Generative AI has emerged as a key tool in research and comparison:

- **66%** use AI platforms for product discovery
- **78%** rely on AI during product comparison
- However, only **16%** use AI for final purchase decisions



Lazada's investments, showcased at the Brand Gala, include AI-powered listing tools, smarter marketing automation, and enhanced customer service to improve discovery, search and personalisation, empower the platform to serve this next generation of quality-conscious consumers.

Lazada is Well-Positioned for the New Era of Confidence Commerce

The survey's findings signal a pivotal moment for Southeast Asia's eCommerce industry, with the region entering a new "Confidence Commerce" phase, defined by higher consumer expectations, an emphasis on product quality, and authenticity guarantees. As this phase progresses, Lazada's mall-first brand-led strategy, anchored in high-trust ecosystems, is uniquely positioned to lead the market toward US\$150 billion in authenticity-driven eCommerce by 2030.

"The findings from Cube Asia validate Lazada's brand-led strategy and reinforce our commitment to building a high-trust, quality-first ecosystem for both consumers and brands," said Iris Wei, President, Lazada Group, "As consumers increasingly seek authenticity, Lazada's strong position in the Mall ecosystem gives us a unique opportunity to lead the region's next phase of eCommerce growth."

The full report can be accessed [here](#).

– END –

About Lazada Group

Lazada Group is Southeast Asia's pioneer eCommerce platform. For the last 13 years, Lazada has been accelerating progress in Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam through commerce and technology. Today, a thriving local ecosystem links about 160 million active users to more than one million actively-selling sellers every month, who are transacting safely and securely via trusted payments channels and Lazada Wallet, receiving parcels through a homegrown logistics network that has become the largest in the region.

Contact Information:

For more information, please contact:

Lazada Communications Team

press@lazada.com

We. Communications for Lazada

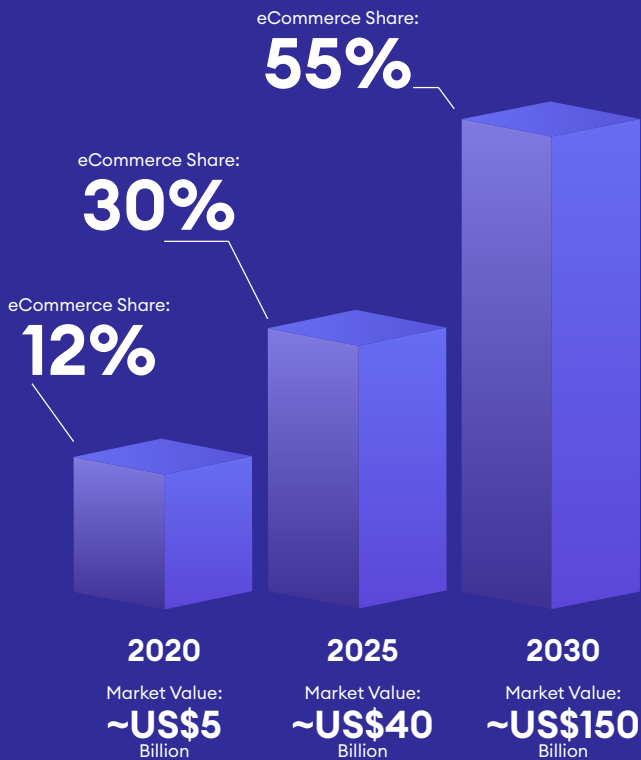
WE-SGLazada@we-worldwide.com

THE RISE OF VIRTUAL MALL ECOSYSTEMS IN SOUTHEAST ASIA



AUTHENTIC, QUALITY-DRIVEN ECOMMERCE IS SET TO RISE

Brand goods purchased through authorised Mall environments, has grown rapidly.



SOUTHEAST ASIAN CONSUMERS ARE INTENTIONAL AND BRAND-CONSCIOUS



9 in 10 of respondents are active Mall shoppers



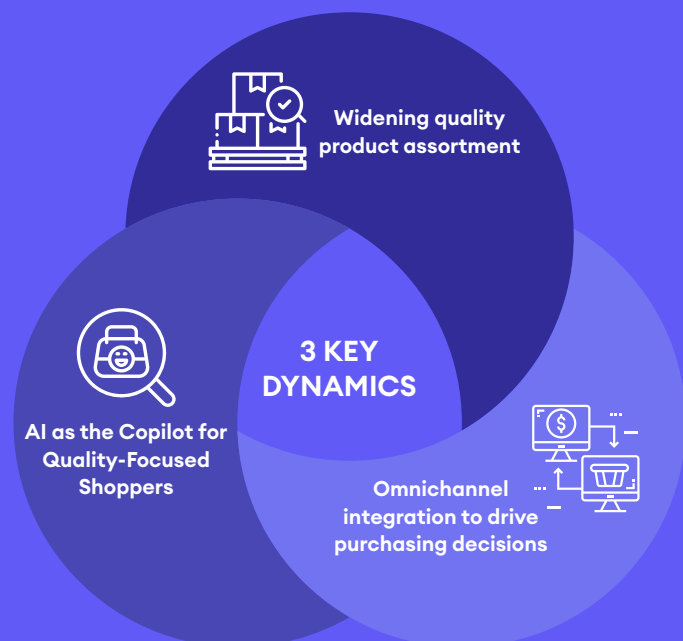
9 in 10 are willing to pay more for brand goods in a trusted Mall environment



31% would pay 10–30% more for authenticity and assurance

TRUST, QUALITY & AI-POWERED EXPERIENCES DRIVING THE ECOMMERCE SURGE

80% of consumers report facing supply constraints when searching for authentic branded products.



66% use AI platforms for product discovery

78% rely on AI during product comparison

73% of consumers engage in showrooming, especially in categories like Beauty, Electronics, and Lifestyle.

LAZADA IS WELL-POSITIONED FOR THE NEW ERA OF CONFIDENCE COMMERCE

The region entering a new “Confidence Commerce” phase



Consumer Expectation



Product Quality



Product Authenticity

LazMall

Lazada's mall-first & brand-led strategy is uniquely positioned to lead the market