

NEWSLETTER

E-COMMERCE

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E-commerce platforms race to expand offline convenience stores

Chinese e-commerce giants are shifting focus to offline retail, launching or upgrading convenience store networks to capture new growth. Platforms are integrating supply chains and offering “30-minute delivery” services to meet surging demand for instant shopping. Industry data show China’s instant retail market is projected to reach 1.4 trillion yuan (\$197 billion) in 2025, with a 25% compound annual growth rate. **(Finance sina)**

Mexico tariffs pose new challenge for cross-border e-commerce

Mexico has approved new temporary tariffs of 10%–50% on 1,371 imported goods from non-FTA countries, including China, starting Jan 1, 2026. The move, part of its 2026 budget plan, will impact industries such as textiles, plastics, and electronics, raising operating costs for Chinese exporters and cross-border e-commerce platforms like Temu and TikTok Shop competing in the Mexican market. **(DSB)**

Chinese products lead Korea’s cross-border shopping market

In Q3 2025, South Korea’s overseas online purchases reached 2.12 trillion won (\$1.5 billion), up 9.2% year-on-year, marking 11 straight quarters of growth. Purchases from China accounted for 66.6%, or 1.41 trillion won (\$1 billion), driven by clothing, food, and household goods. Platforms like AliExpress, Temu, and SHEIN now rank among Korea’s top 10 shopping apps. **(DSB)**

“Double 11” shopping bonanza ignites fresh surge in consumer spending

China’s monthlong “Double 11” shopping festival has spurred strong demand for AI-powered and emotionally driven products. Backed by 300 billion yuan (\$42.3 billion) in government trade-in bonds, sales of AI smart glasses on Tmall jumped 25 times year on year, while JD.com saw a 346% rise. Analysts say the festival underscores China’s push to expand domestic demand and foster new consumption trends. **(Xinhua)**

JD.com’s “Double 11” sales hit new highs as AI and service categories surge

According to JD.com, transaction volume during this year’s “Double 11” shopping festival reached a new record, with the number of buyers up 40% and total orders rising nearly 60%. Sales of AI-related electronics grew sharply—AI tablets up 200% and AI smartphones 150%—while categories such as home appliances, groceries, and travel also recorded triple-digit growth. **(Ebrun)**