

NEWSLETTER

E-COMMERCE

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China tech giants race to redefine AI commerce

Alibaba Group, JD.com and ByteDance are accelerating AI-powered e-commerce competition in 2026. New tools like Alibaba's AI digital assistant "Xiaojiewo," JD's "AI Shopping" and ByteDance's "Doubao" enable conversational shopping, price comparison and complete transactions. With AI apps reaching 440 million monthly users in China, platforms are racing to embed AI into the entire retail chain. **(Sohu)**

TikTok surpasses 2 billion monthly users, drives global social commerce boom

TikTok has exceeded 2 billion monthly active users in 2026 Q1, meaning one in four people worldwide uses the platform. Its e-commerce GMV reached \$64.3 billion in 2025, up 94% year-on-year. Southeast Asia contributed over 70% of sales, while the U.S. remained the largest single market. TikTok is evolving from short-video commerce to a full "content + livestream + storefront" ecosystem. **(Sohu)**

Shenzhen accelerates AI-driven e-commerce growth

Shenzhen is rapidly integrating AI into e-commerce, driving new models like livestreaming and instant retail. Online retail sales grew over 30% annually during the 14th Five-Year Plan, while cross-border e-commerce reached 284.5 billion yuan (\$39.3 billion) in 2025. With 16 of the world's top 20 platforms present, AI is reshaping operations from product selection to logistics and global expansion. **(Economic Daily)**

Douyin e-commerce drives rapid growth of Chinese brands

Douyin reported strong growth in domestic-brand consumption in 2026, with active Chinese-brand merchants rising 47% yoy and livestreaming contributing 63% of transactions. AI home appliances, 3C electronics and traditional heritage products all saw rapid sales growth. More than 100 million new users purchased Chinese brands, while lower-tier cities became a major growth engine for livestream-driven consumption. **(Finance.sina)**

Meituan reports strong growth in long-distance holiday travel consumption

Meituan, a Chinese on-demand services and e-commerce platform, said mid- and long-distance travel orders accounted for 46% of total bookings during the 2026 May Day holiday, driven by extended vacations and flexible leave arrangements. The data highlights continued growth in travel-related online consumption, with Beijing, Chengdu and Shanghai ranking among the most popular destinations on the platform. **(Jiemian)**