ITALIAN TRADE AGENCY

ITA Beijing Office

NEWSLETTER

E-COMMERCE
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TikTok Drives UK E-Commerce Growth
A Public First report found that TikTok contributed at least 10 billion pounds (about 13.4 billion U.S. dollars) to the UK economy in 2025, supporting 153,000 jobs. The report said 91% of TikTok Shop merchants increased sales, while the platform helped UK SMEs generate 3.4 billion pounds (about 4.6 billion U.S. dollars) in additional revenue, highlighting its expanding role in e-commerce and small business growth. **(Ebrun)**

SHEIN's Third-Party Marketplace Expands
SHEIN reported 2025 net revenue of 41.85 billion U.S. dollars, according to its Hong Kong listing documents. Service revenue, mainly from its third-party marketplace, increased to 14.3% of total revenue in the first quarter of 2026, reflecting rapid marketplace expansion. The global e-commerce platform served 273 million active customers across about 160 markets in 2025. **(Ebrun)**

EU Tariff Changes Push Chinese Cross-Border Sellers Upmarket
China's cross-border e-commerce exporters are shifting toward higher-value products, bundled sales and overseas warehouses after the EU imposed a 3-euro (about 3.5 U.S. dollars) fee on low-value parcels. The policy is accelerating the industry's transition from low-price exports to brand development, localized fulfillment and stronger pricing power. **(CCTV)**

Indonesia Advances Antitrust Hearing on TikTok Shop-Tokopedia
Indonesia's Competition Commission (KPPU) has completed the investigation phase of its antitrust probe into the TikTok Shop-Tokopedia ecosystem and is preparing to submit the case for a formal hearing. The investigation follows allegations that the integrated platform unfairly restricted competition through vertical integration, self-preferencing and logistics practices, potentially breaching Indonesia's anti-monopoly law. **(Sohu)**

Chinese E-Commerce Innovation Reshapes Global Retail Landscape
A NielsenIQ report showed that China’s e-commerce innovations, including livestream e-commerce, social commerce and instant retail, are influencing global retail trends. China’s livestream e-commerce market reached about 900 billion USD in 2025, while social commerce is expected to reach 1.8 trillion USD by 2030. In Asia-Pacific, 59% of consumers have purchased via social platforms, highlighting new e-commerce models. **(China News)**