

TikTok Shop 2025 Q1 Report

TikTok Shop Market Report:
Fashion Category (2025Q1)

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Data Statistics Period: Jan 2024 – Dec 2024



EchoTik Website



EchoTik WeChat



South-East Asia Markets

GMV Overview | TOP 10 Category GMV |
Pricing Analysis | Ranking Analysis



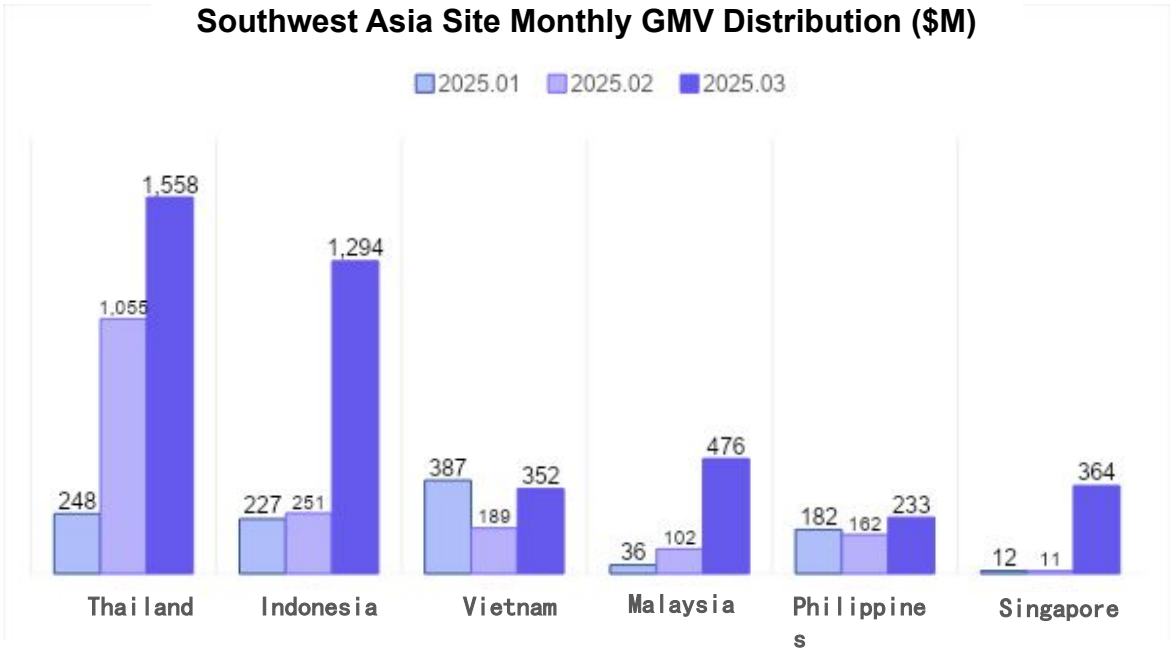
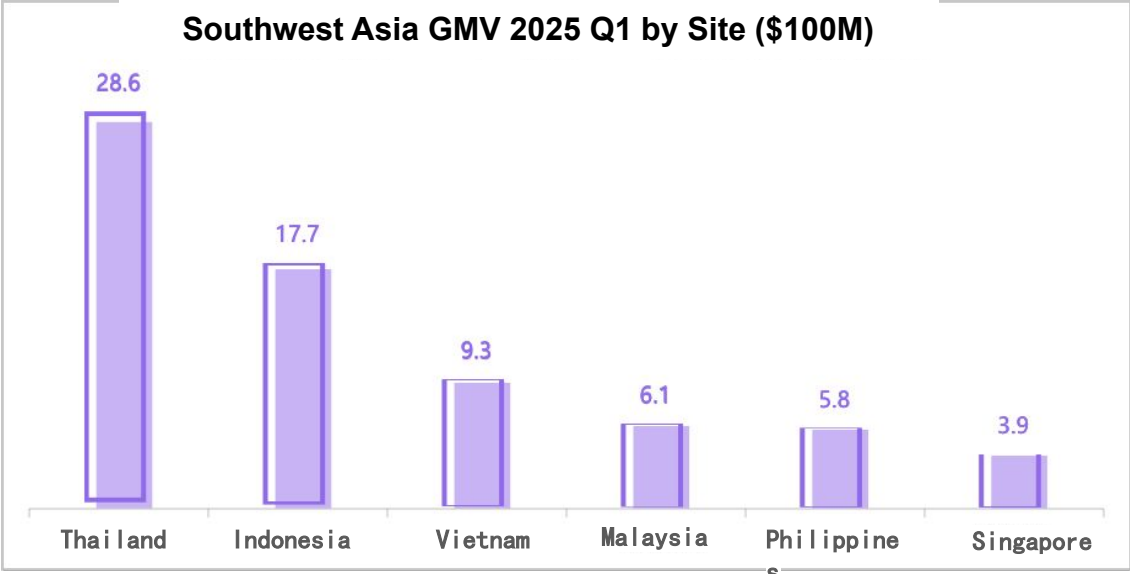
CHAPTER ONE



Southeast Asia Market Q1 Total GMV Reaches \$7.14 Billion

Thailand lead with GMVs of \$3B.

- Despite a weak global economic climate and policy fluctuations, TikTok maintained strong growth in Southeast Asia in Q1 2025. The total GMV reached \$7.14 billion, up 85% from Q1 2024's \$3.85 billion. Thailand led with \$3.86 billion GMV, followed by Indonesia at \$1.77 billion. Vietnam reached \$930 million, Malaysia \$610 million, the Philippines \$580 million, and Singapore \$390 million — all showing strong growth.
- March was a peak for Southeast Asia's e-commerce, with Thailand and Indonesia exceeding \$1 billion in GMV that month, driven by Ramadan promotions. Singapore also performed well in March.





Thailand

site

GMV Overview | TOP 10 Category GMV |
Pricing Analysis | Ranking Analysis



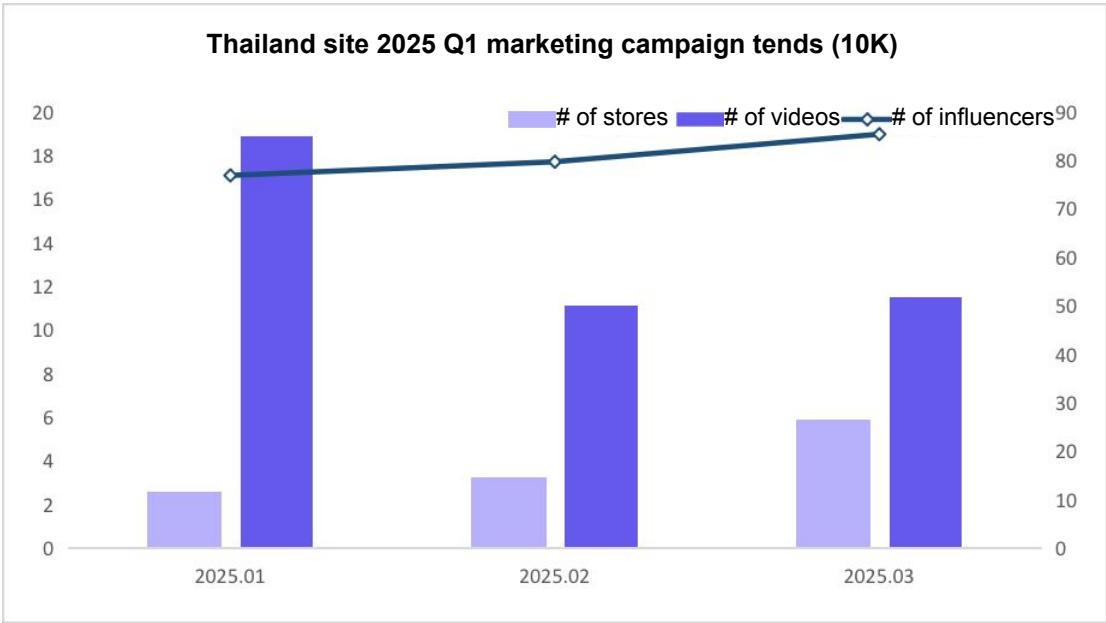
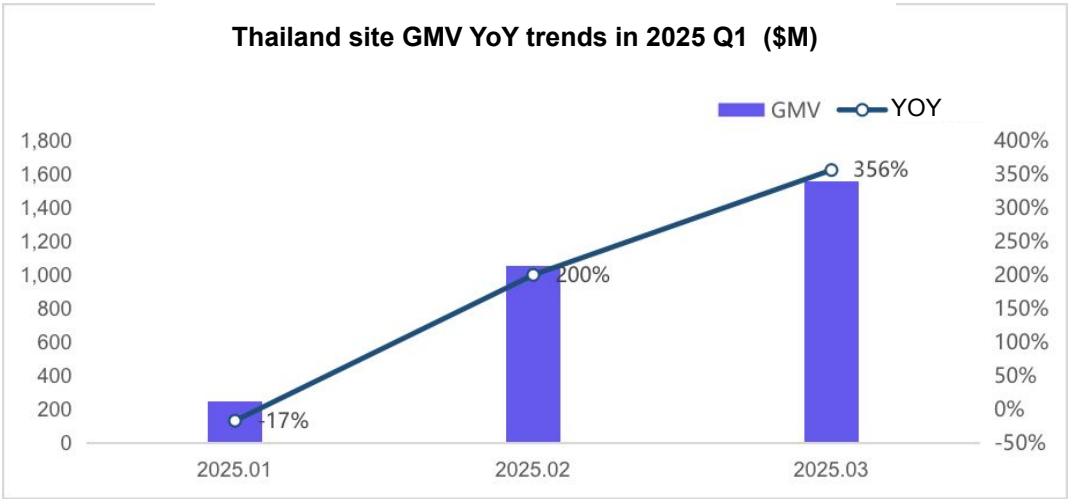
CHAPTER TWO

2

Thailand Market GMV Exceeds \$2.8B leading Southeast Asia market

Influencer marketing is the key marketing channel.

- Overall, Thailand's Q1 2025 GMV exceeded \$2.8 billion. February and March each surpassed \$100 million, more than doubling year-on-year and showing strong growth.
- In terms of marketing, small stores grew to 60,000 by Q1. Monthly video content fell from nearly 200,000 in January to about 110,000, while the number of creators jumped to 850,000 by March, boosting ecosystem expansion.



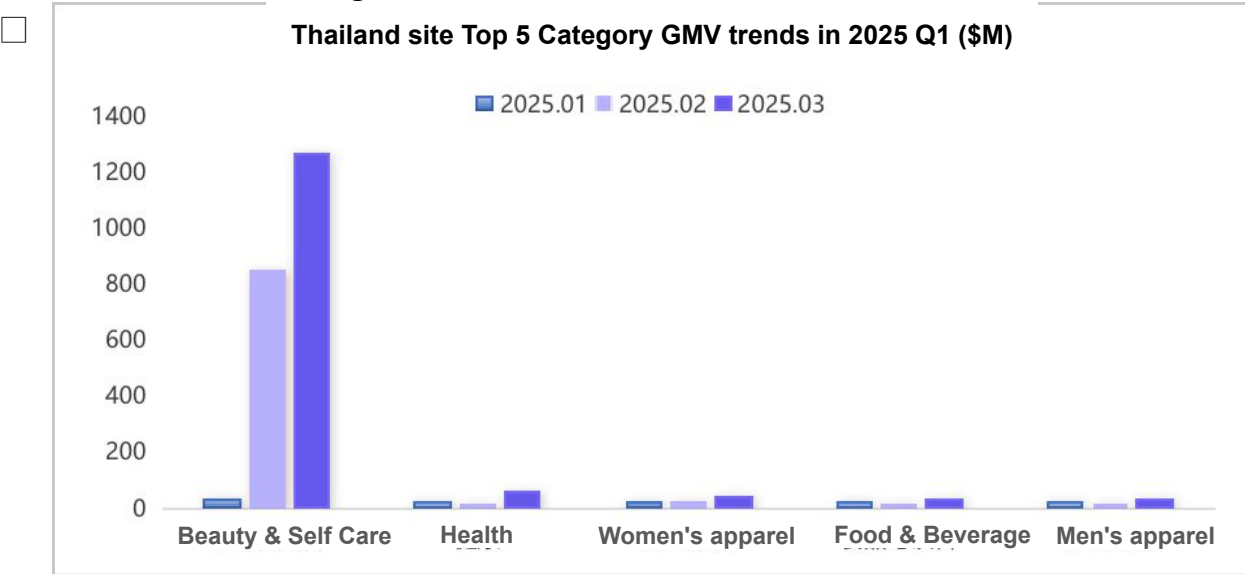
Data source: EchoTik

Thailand Market **Fluctuates in Growth** Across Categories Throughout Q1

Beauty & Personal Care Has Long Been in the **Top 1**

In Q1 2025, Thailand’ s top categories grew rapidly, with **Beauty and Personal Care** leading. **GMV in March alone exceeded \$1.2 billion**, outperforming all other categories combined.

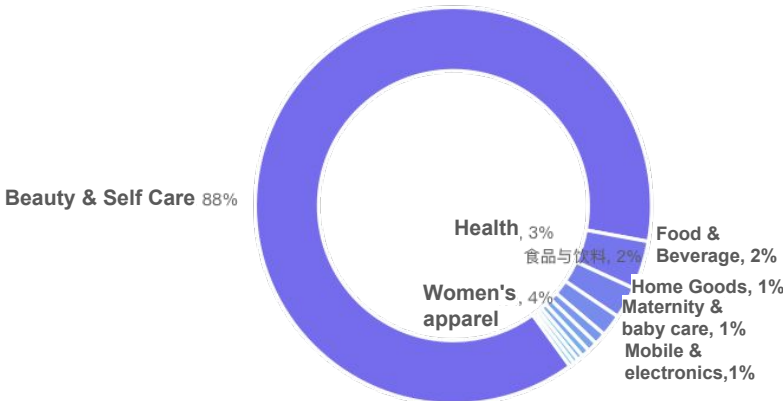
- Q1 Top 10 Categories GMV reached \$2.41 billion, contributing 86% of total GMV. **Beauty and Personal Care** , driven by KOL/KOC and short video promotions, accounted for 87% of the Top 10, proving the power of low-cost products combined with content marketing. **Health (\$96M) and Women’ s Apparel (\$63M)** followed, but the gap highlights a strong “winner-takes-all” trend in Beauty under TikTok’ s content-driven growth.



Thailand site Top 10 Category GMV (\$100M)



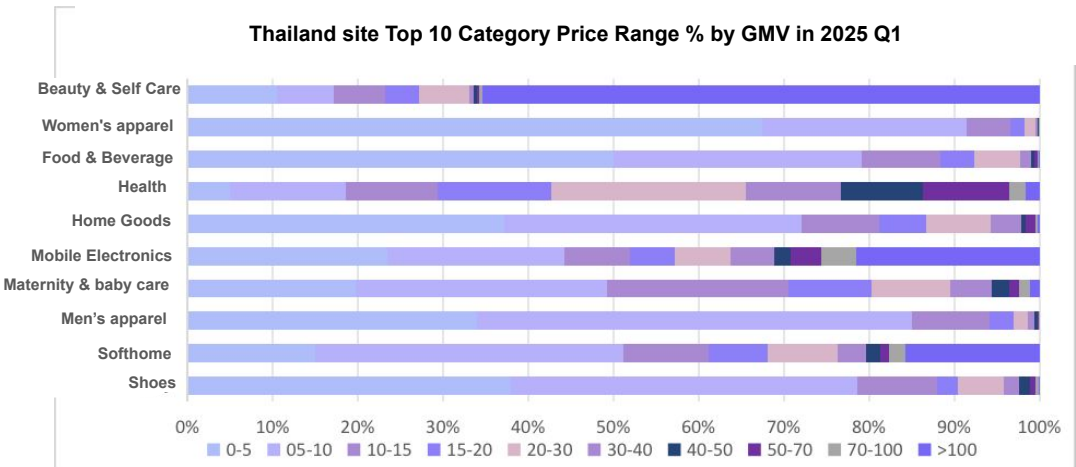
Thailand site Top 10 Category GMV %



Lower price range are majority in the Thailand market but moving toward balanced development.

Major contribution to the GMV lies in the \$0-\$10 price range

- ◆ In Q1 2025, Thailand's best-selling products were priced under \$5, making up 30% (health) - 79% (home goods) of sales by category, with over 70% in women's apparel, home goods, and electronics. Products under \$10 accounted for 88% of total sales, showing a strong preference for low-price items.
- ◆ However, GMV was more varied. Beauty's GMV came mostly from high-priced items, with over 70% from products above \$100. Health category GMV was evenly spread across price ranges, reflecting diverse demand and localization. Most other categories—like apparel, food, and home goods—still relied on sub-\$10 products for over 70% of GMV.



Thailand Market Best-Sellers

Mar 2025 TOP5 Best-sellers



New Acne Treatment Cream

store: MOOSLOVER UK
price: \$29.44
selling amount: 160.4K
GMV: \$472.2M
of influencers: 763
of videos: 2.8K



Glutathione Collagen Cream

store: ช้อผืนช่องจริง SHOP
price: \$7.98
selling amount: 7.2K
GMV: 205.8M
of influencers: 17
of videos: 38



Collagen Lotion

store: ช้อผืนช่องไลฟ์
price: \$7.98
selling amount: 6.1K
GMV: \$38.2M
of influencers: 7
of videos: 14



Salted Dried Mango

store: ยายหมีไลฟ์สด
price: \$3.8
selling amount: 8.7K
GMV: \$34.24M
of influencers: 1
of videos: 0



Ruby Body Lotion

store: ยายหมีไลฟ์สด
price: \$20.58
selling amount: 982
GMV: \$19.9M
of influencers: 0
of videos: 0



Indonesia site



GMV Overview | TOP 10 Category GMV |
Pricing Analysis | Ranking Analysis

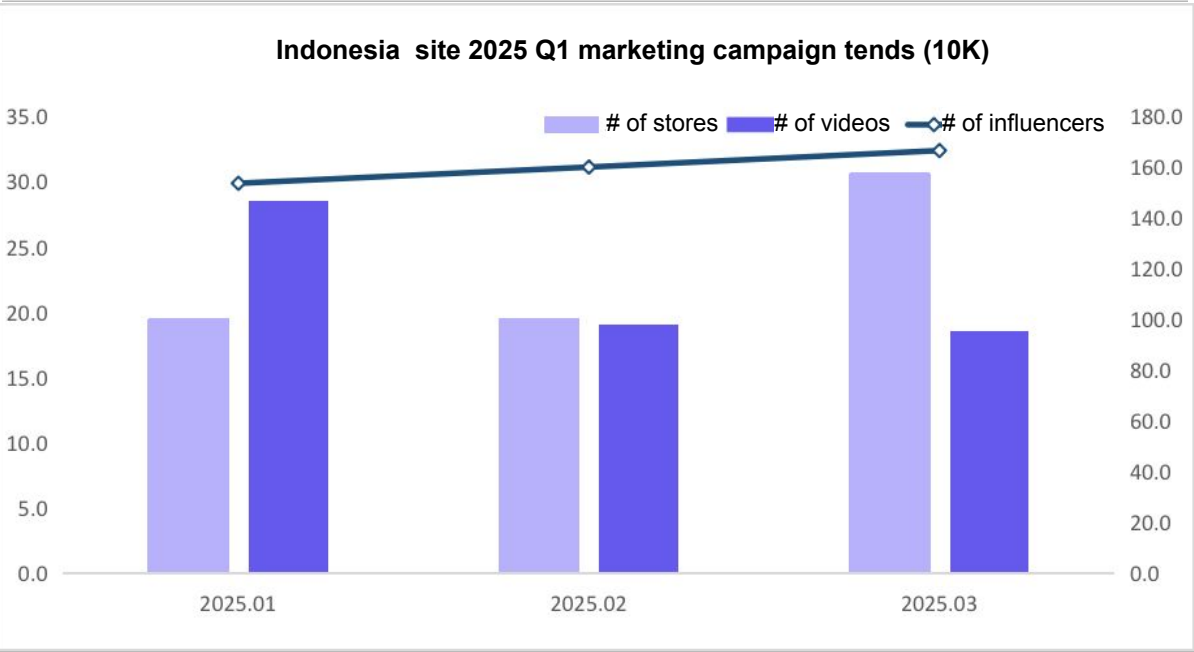
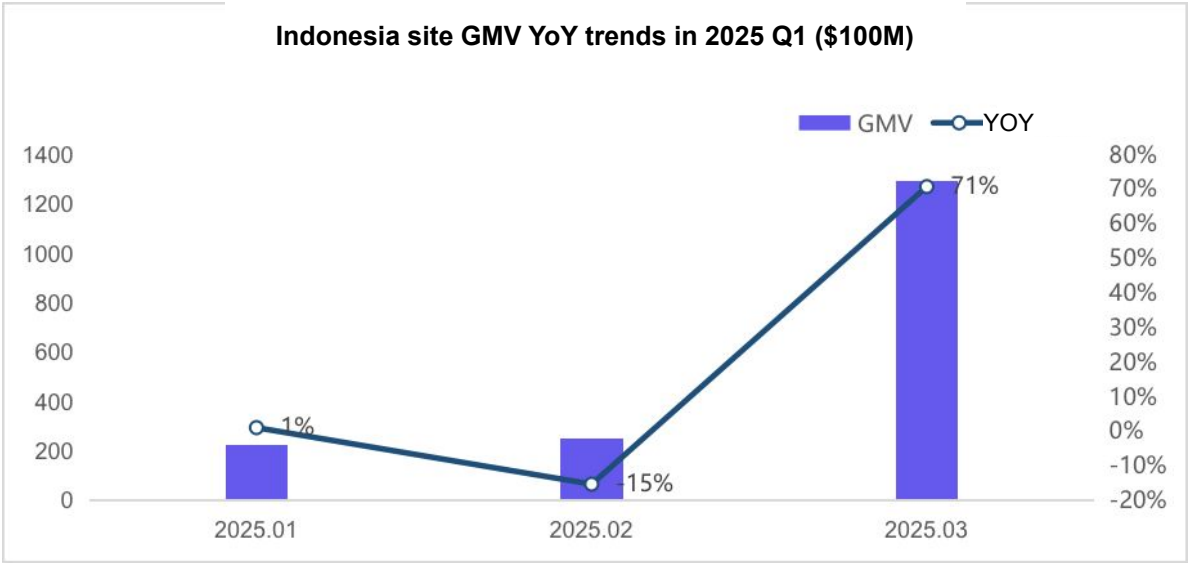
CHAPTER THREE

3

Indonesia Market GMV Exceeds \$1.7B Ranking Top 2 in Southeast Asia market

Influencer Livestream and Video Content are the key marketing strategies.

- Overall, Indonesia’s Q1 2025 GMV exceeded \$1.7 billion. March GMV surpassed \$100 million, up nearly 70% year-on-year, showing steady growth.
- In terms of marketing, small stores grew rapidly to 306,000 by late March — the highest in Southeast Asia. Since 2025, Indonesia has launched a creator education program, seamlessly linking content and commerce. The number of creators surged to 1.67 million in March, reflecting a new “see and buy” trend.



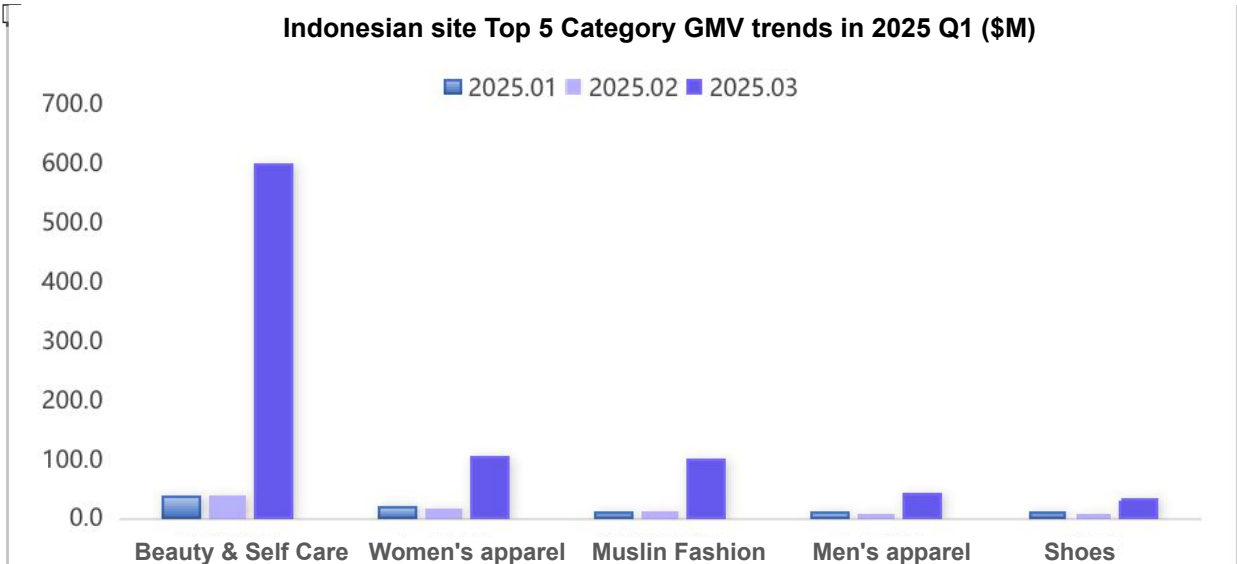
Data source: EchoTik

Indonesian Categories Surge in March Due to Ramadan

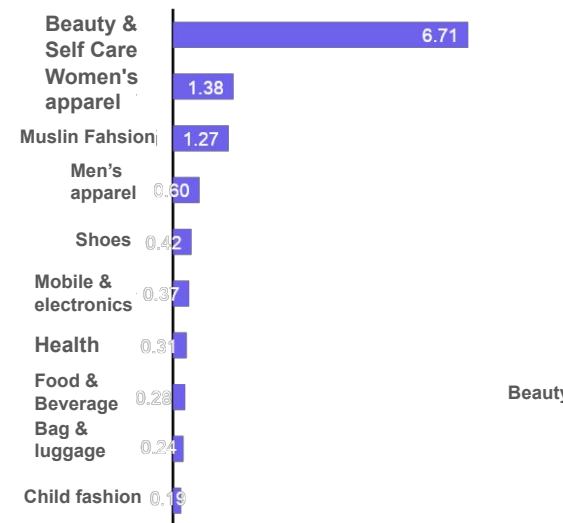
Beauty and Personal Care Lead by Far

In Q1 2025, Indonesia's top categories grew rapidly, especially in March, driven by Ramadan promotions. Year-on-year growth more than doubled. **Beauty and Personal Care GMV in March approached \$600M, exceeding all other categories combined.**

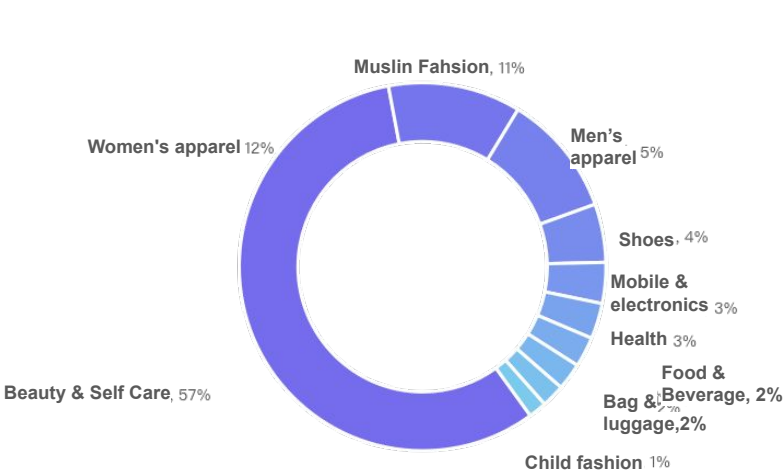
- Q1 Top 10 Categories GMV was about \$1.2 billion, accounting for 67% of total GMV. **Beauty and Personal Care**, supported by influencer programs and low-cost products, led with nearly 60% of the Top 10 GMV, making it a key track in Indonesia. **Women's Apparel and Muslim Fashion** followed in 2nd and 3rd place, boosted by Ramadan promotions through live and short video content.



Indonesia site Top 10 Category GMV (\$100M)



Indonesia site Top 10 Category GMV %

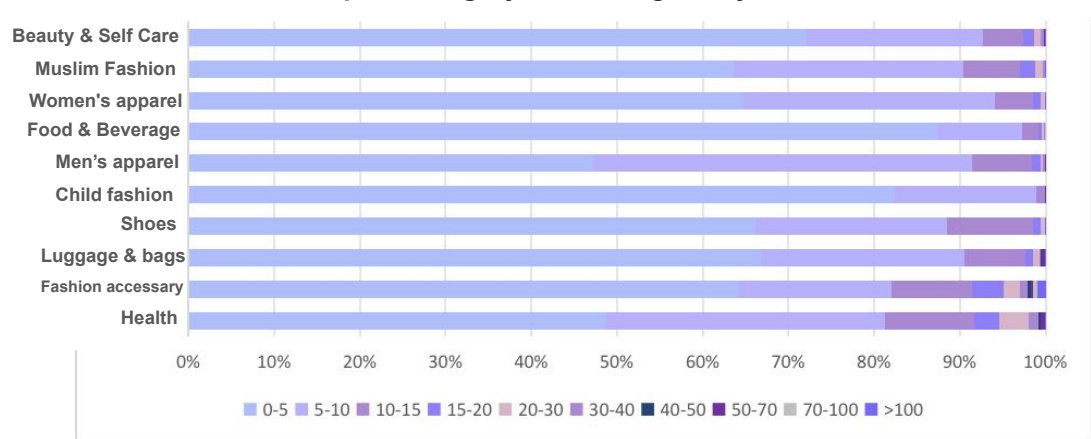


Indonesia’ s Market Dominated by Low-Priced Products

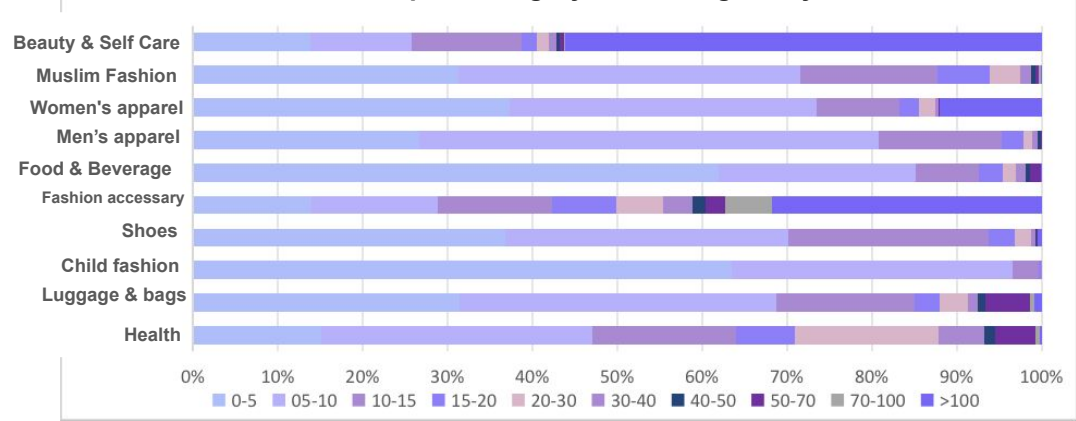
Main Sales Range: \$0 – \$5

- In Q1 2025, Indonesia continued the Southeast Asia trend of low-price sales. Products under \$5 were most popular, making up 49% (health) – 87% (men’ s apparel) of category sales, with over 70% in women’ s apparel, beauty, and kids’ fashion. Overall, 92% of total sales came from items priced below \$10, showing a strong low-price market.
- GMV analysis reveals two trends:
- Categories like beauty and fashion accessories showed balanced GMV across price tiers, with under-\$10 products contributing less than 30%, and over-\$100 items accounting for more than 30%, indicating a potential high-end market.
- Other categories—Muslim fashion, women’ s and men’ s apparel, food, and kids’ fashion—were dominated by low prices, with 70% - 90% of GMV coming from products under \$10, highlighting a strong price advantage.

Indonesia site Top 10 Category Price Range % by Sales Orders in 2025 Q1



Indonesia site site Top 10 Category Price Range % by GMV in 2025 Q1



Indonesia Market Best-Sellers

Mar 2025 TOP5 Best-sellers



Arbutin Whitening Serum

store: MAYDOOZAOFFICIAL.ID
price: \$11.30
selling amount: 6.8K
GMV: \$61.59M
of influencers: 27
of videos: 34



Cute Hair Tie

store: KapsidaHS
price: \$60.16
selling amount: 16.4K
GMV: \$18.59M
of influencers: 1
of videos: 1



Serum + Whitening Lotion

store: MAYDOOZAOFFICIAL.ID
price: \$11.74
selling amount: 28.6k
GMV: \$7.98M
of influencers: 2
of videos: 2



Xiaomi Dimensity Smartphone

store: Xiaomi Indonesia
price: \$288.98
selling amount: 9.1K
GMV: \$2.43M
of influencers: 79
of videos: 128



Smart Dash Cam

store: 70mai Official Indonesia
price: \$147.52
selling amount: 12.5K
GMV: \$1.6M
of influencers: 6
of videos: 7



Vietnam Site



GMV Overview | TOP 10 Category GMV |
Pricing Analysis | Ranking Analysis

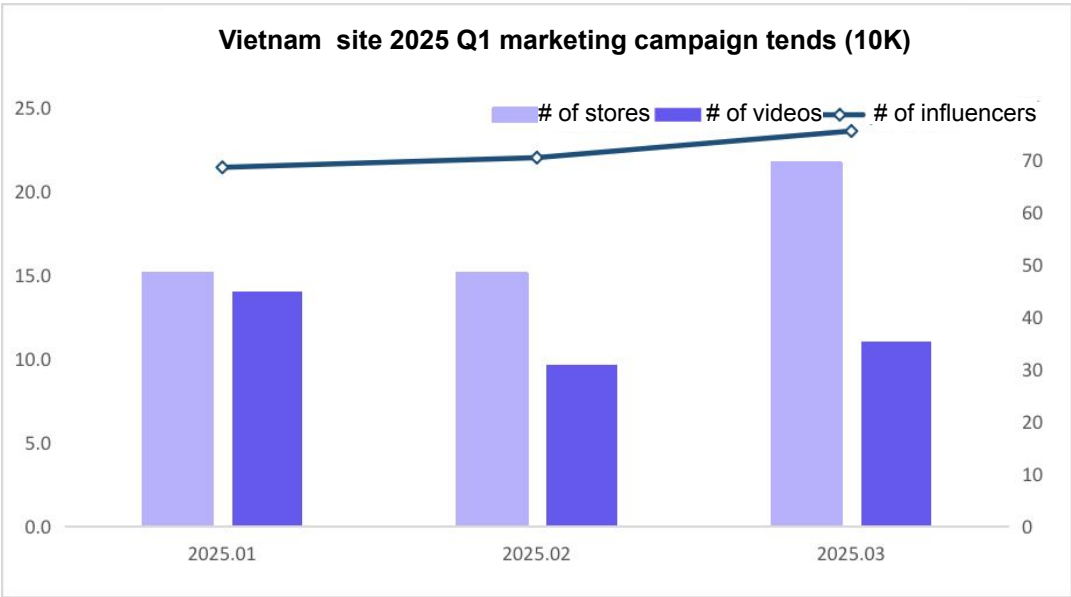
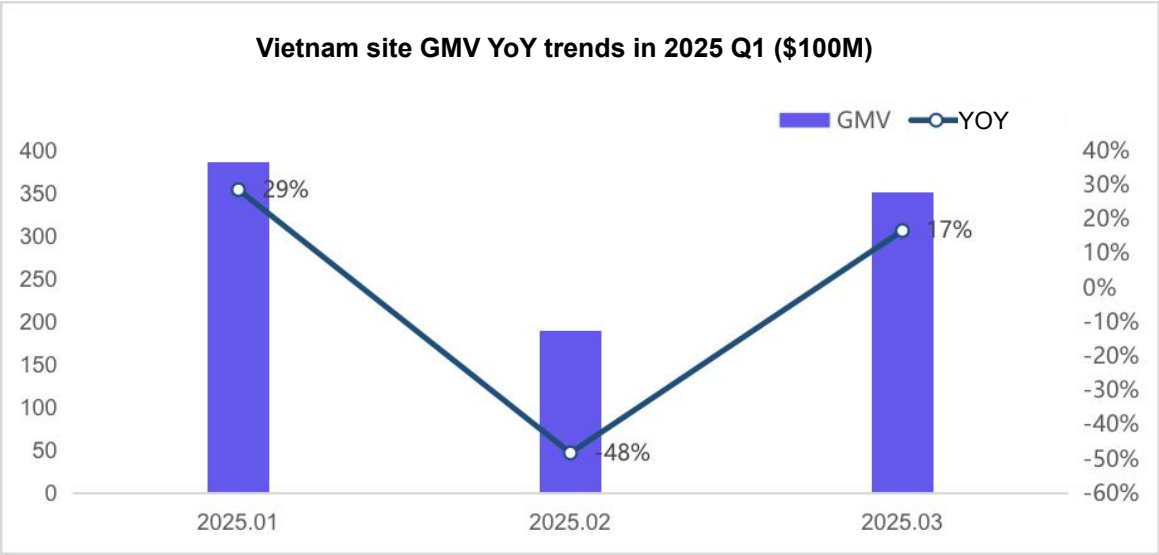
CHAPTER FOUR

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Vietnam Market Q1 GMV Exceeds \$930 Million, YoY 11%

Influencer Livestream is the key marketing strategies following with video content

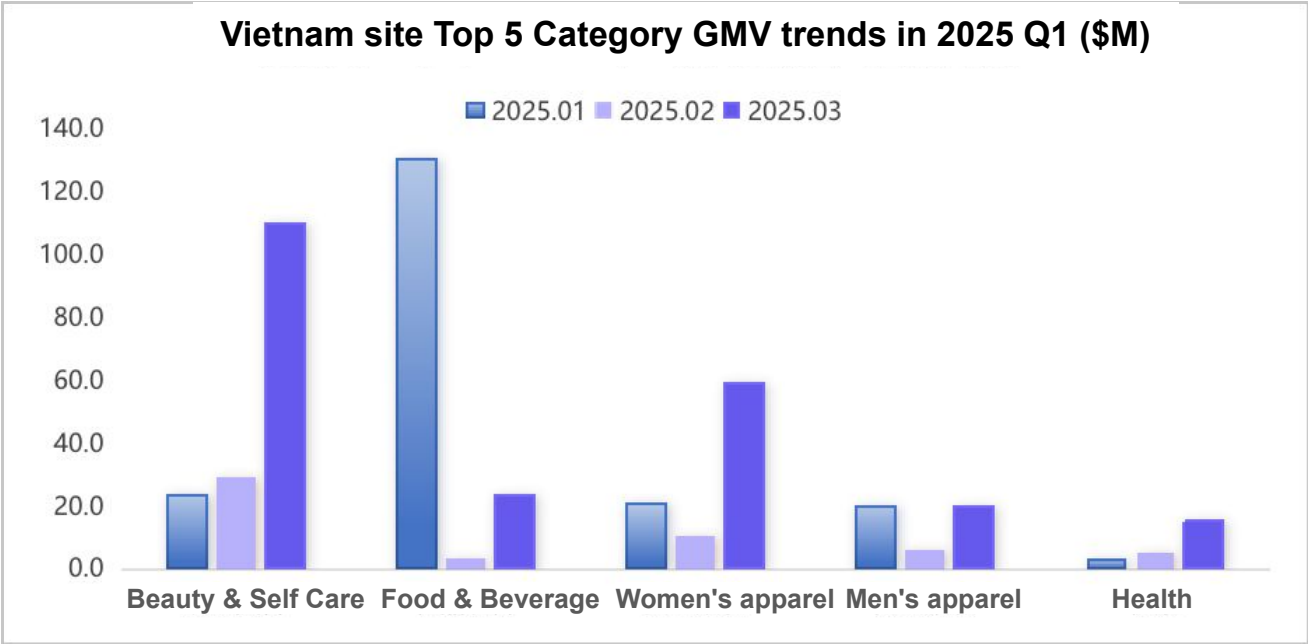
- In Q1 2025, Vietnam's total GMV exceeded \$900 million, with January alone surpassing \$300 million due to Tet holiday promotions. Compared to Q1 2024, GMV grew by over 11%, showing TikTok's rapid expansion and rising market share in Vietnam.
- On the marketing front, the number of small stores steadily rose to around 200,000 by March. With consumers shifting toward content-driven platforms, creator numbers grew quickly. Live commerce became dominant, supported by short-form video as a secondary driver.



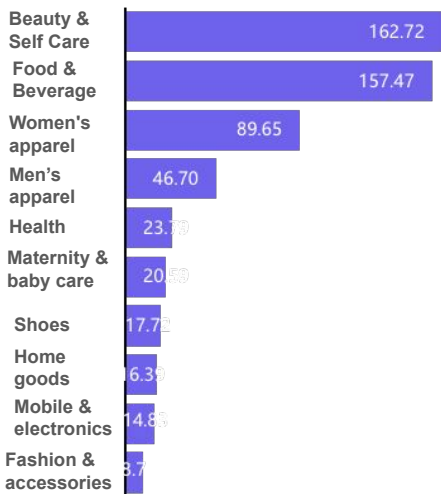
Vietnam Categories Spiked During Tet, Then Stabilized

Food & Beverage and Beauty Led the Market

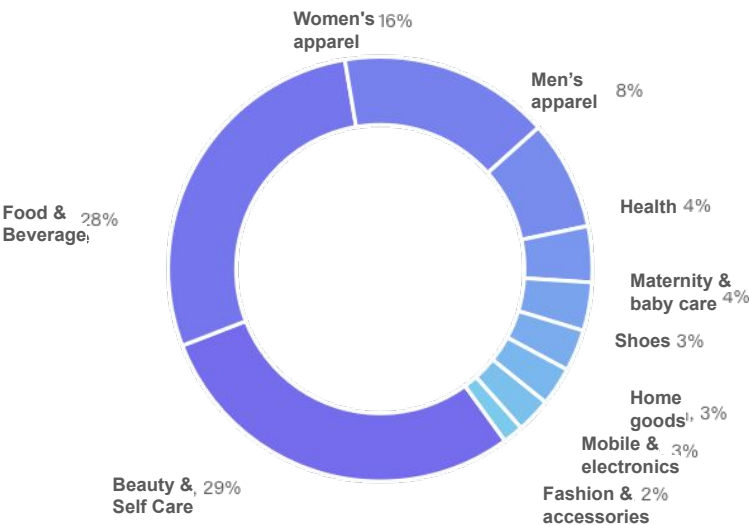
- In Q1 2025, Vietnam's top categories saw a sharp rise followed by stabilization, driven by Tet holiday promotions. Food & Beverage, highly influenced by seasonal campaigns, surged alongside Beauty, with each reaching around \$150 million in GMV—together exceeding all other categories combined.
- The Top 10 categories contributed about \$560 million, or 60% of total GMV. Beauty led due to strong demand and diverse, visual marketing. Food & Beverage and Women's Apparel ranked 2nd and 3rd, boosted by holiday promotions via creators and short videos.



Vietnam site Top 10 Category GMV (\$100M)



Vietnam site Top 10 Category GMV %

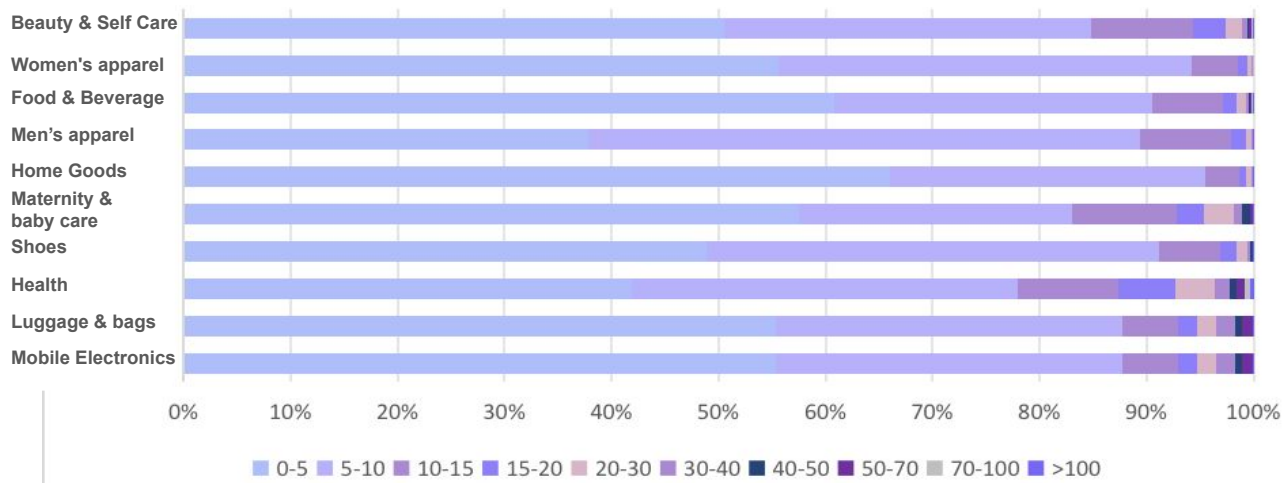


Vietnam Market Driven by Low-Priced Products

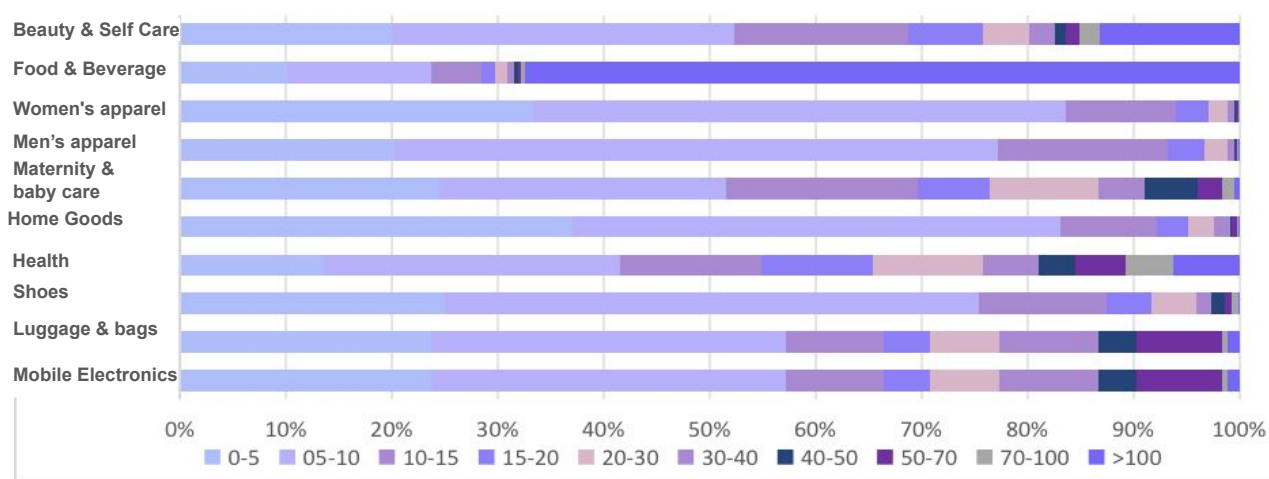
Mainstream order price range is below \$5

- ◆ In Q1 2025, Vietnam's most popular products remained those under \$5. Across categories, items priced \$0 - 10 made up 78%(health) - 95%(home goods) of sales, with over 90% in women's apparel, food & beverage, men's apparel, and shoes. Products under \$10 accounted for 89% of total sales volume, or around 85 million units.
- ◆ From a GMV perspective, low-priced products still dominated, contributing 54% of total GMV. Categories like men's and women's apparel, home goods, and shoes saw 60% - 85% of GMV from items under \$10. However, due to varied consumer needs, categories like food & beverage, beauty, and health showed a more balanced distribution. Notably, in food & beverage, items over \$100 made up nearly 70% of GMV during holiday campaigns, indicating high-value potential in seasonal peaks. Health and maternity categories also showed balanced demand across price ranges, reflecting diverse consumer needs.

Vietnam site Top 10 Category Price Range % by Sales Orders in 2025 Q1



Vietnam site site Top 10 Category Price Range % by GMV in 2025 Q1



Vietnam Market Best-Sellers

Mar 2025 TOP5 Best-sellers



Natural Herbal Brightening Powder

store: Natural-Glow
price: \$10.17
selling amount: 4.6K
GMV: \$5.05M
of influencers: 2
of videos: 9



Natural Mineral Foot Scrub Stone

store:Đào Thu Hiền Daily
price: \$4.67
selling amount: 24.6K
GMV: \$2.43M
of influencers: 9
of videos: 11



Earphone

store: Earbuds & Earphones
price: \$8.7
selling amount: 160.8k
GMV: \$1.4M
of influencers: 993
of videos: 2.6K



Hair Care Essential Oil Spray

store: Coconut Cosmetic Ben Tre
price: \$3.32
selling amount: 1.1K
GMV: \$1.15M
of influencers: 1
of videos: 1



Silksoft Tissues

store: Sipiiao Facial Tissue
price: \$5.44
selling amount: 382.6K
GMV: \$848.2K
of influencers: 2.4K
of videos: 10.6K



Malaysia site

GMV Overview | TOP 10 Category GMV |
Pricing Analysis | Ranking Analysis



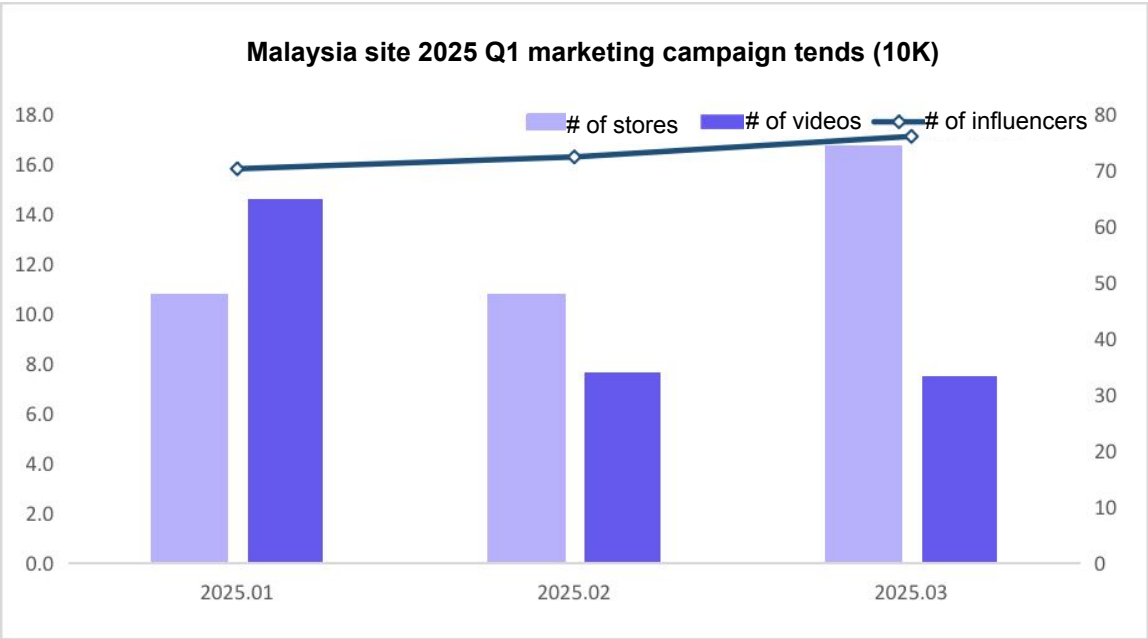
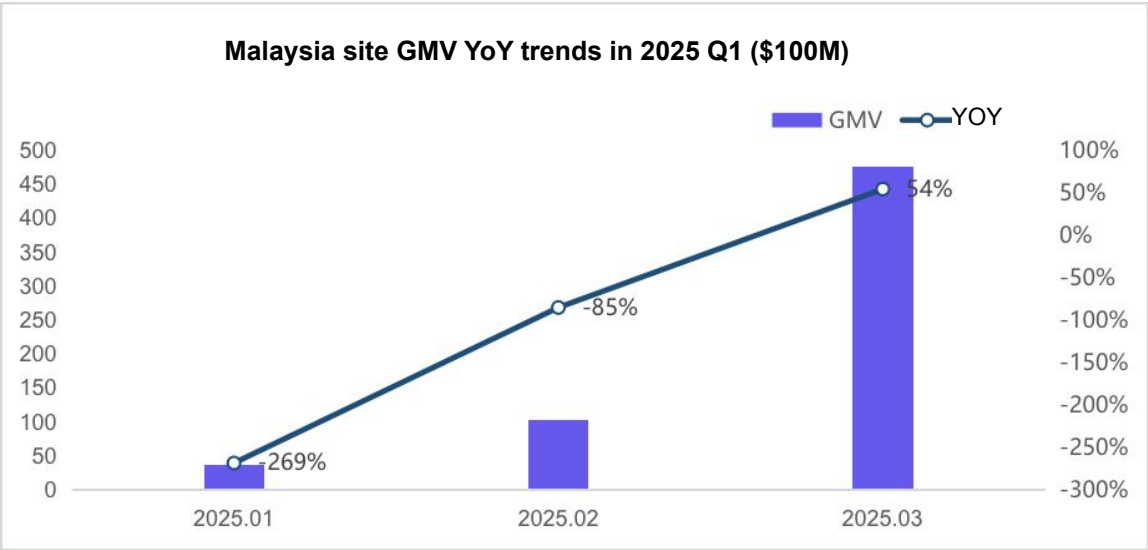
CHAPTER FIVE



Malaysia Market Q1 GMV Reached \$610 Million

Influencer Livestream is the key marketing strategies following with video content

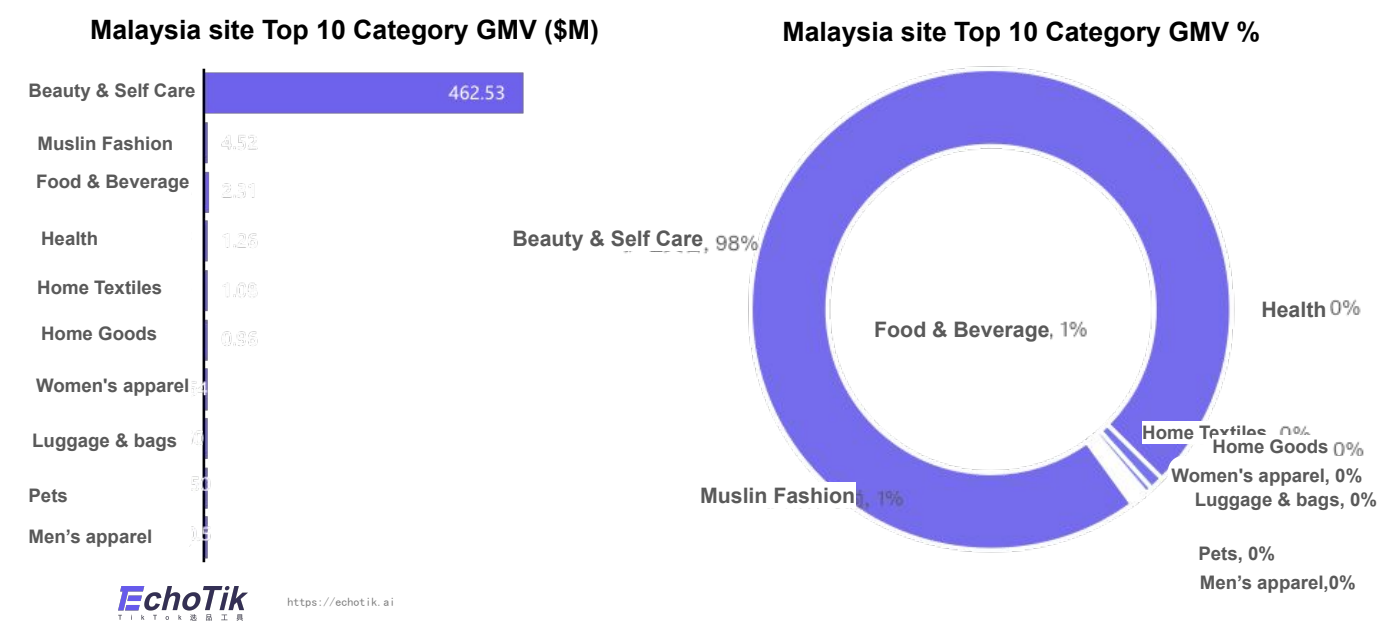
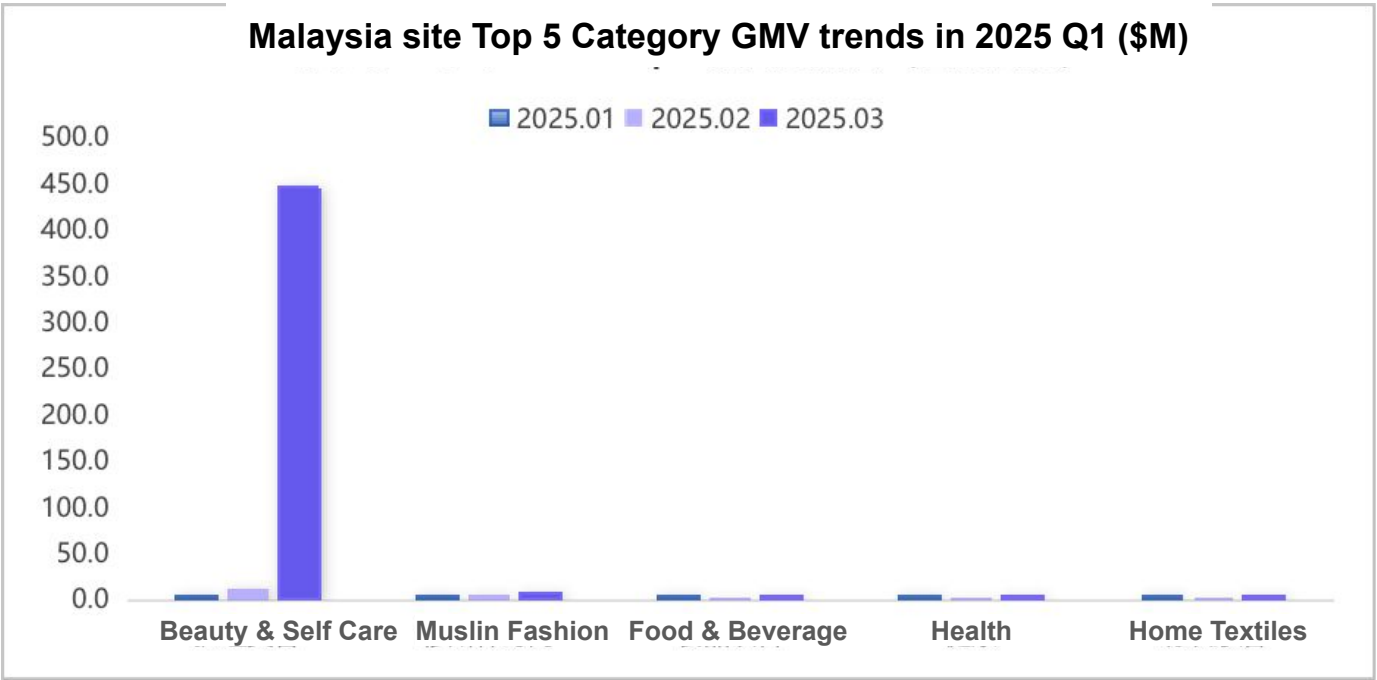
- ❑ In Q1 2025, Malaysia' s total GMV exceeded \$600 million, with March alone surpassing \$400 million due to Ramadan promotions. Compared to Q1 2024, GMV grew by over 54%. With 73 million active users, TikTok' s market share in Malaysia continued to expand.
- ❑ By the end of March, the number of small stores rose quickly to around 170,000. Strong consumer engagement with creator livestreams drove the number of creators up to around 410,000. Livestream selling became the dominant marketing method, supported by short videos.



Ramadan Boosts Malaysia's Key Categories

Beauty Dominates as Top Performer

- ❑ In Q1 2025, Malaysia's leading categories surged due to Ramadan campaigns. **Beauty & Personal Care** led the way, reaching **\$450 million GMV in March alone**—exceeding all other categories combined.
- ❑ The Top 10 categories generated about \$480 million, accounting for 78% of total GMV, showing high concentration. **Beauty & Personal Care** dominated thanks to strong demand and effective local short-video marketing. **Muslim Fashion** ranked second, driven by localized campaigns and high festive demand. **Food & Beverage** came third , benefiting from low prices and convenient shopping, creating unique

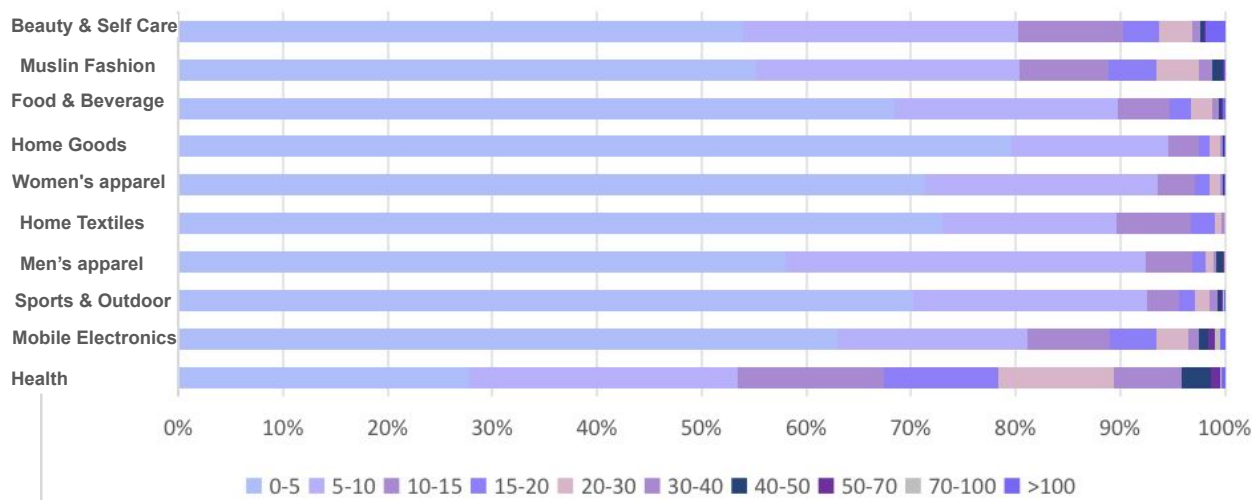


Malaysia Market Driven by Low-Priced Products

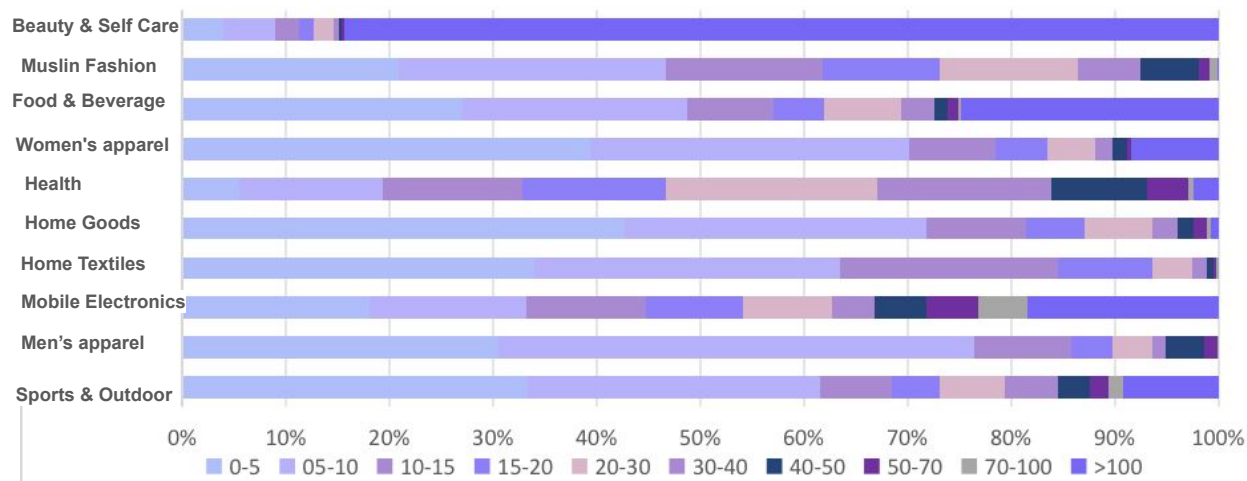
Mainstream order price range is below \$5

- ◆ In Q1 2025, Malaysia's most popular products remained those under \$5, making up 28% (Health) - 70% (Home goods) of category sales. Over 90% of sales in women's apparel, food & beverage, men's apparel, and sports & outdoor were from items under \$10. Products below \$10 accounted for 70 million units, or 85% of total sales.
- ◆ GMV distribution showed two trends. Categories like beauty, electronics, and food had balanced GMV across price tiers, with under-\$10 products contributing around 30%. Beauty, in particular, saw over 70% of GMV from items above \$100, indicating a high-end market. In contrast, categories like women's and men's apparel, home goods, and sports relied heavily on low prices, with 60%-70% of GMV from items under \$10, confirming the strength of low-cost products in Malaysia.

Malaysia site Top 10 Category Price Range % by Sales Orders in 2025 Q1



Malaysia site site Top 10 Category Price Range % by GMV in 2025 Q1



Malaysia Market Best-Sellers

Mar 2025 TOP5 Best-sellers



Hair Care Essential Oil Sprav

store:MAZAVILLE
price: \$11.26
selling amount: 442.8K
GMV: \$4.98M
of influencers: 297
of videos: 442



Lipstick Set

store: MAZAVILLE
price: \$2.26
selling amount: 554.7K
GMV: \$2.08M
of influencers: 228
of videos: 274



Eye Care Set

store:MAZAVILLE
price: \$22.3
selling amount: 111.3K
GMV: \$1.16M
of influencers: 108
of videos: 116



Lip Gloss Set

store: FAYCY BEAUTY
MALAYSIA
price: \$7.65
selling amount: 4.6k
GMV: \$351.9K
of influencers: 5
of videos: 5



Primer

store: Sipiao Facial
Tissue
price: \$14.9
selling amount: 148
GMV: \$220.5K
of influencers: 0
of videos: 0



Philippines Site

GMV Overview | TOP 10 Category GMV |
Pricing Analysis | Ranking Analysis



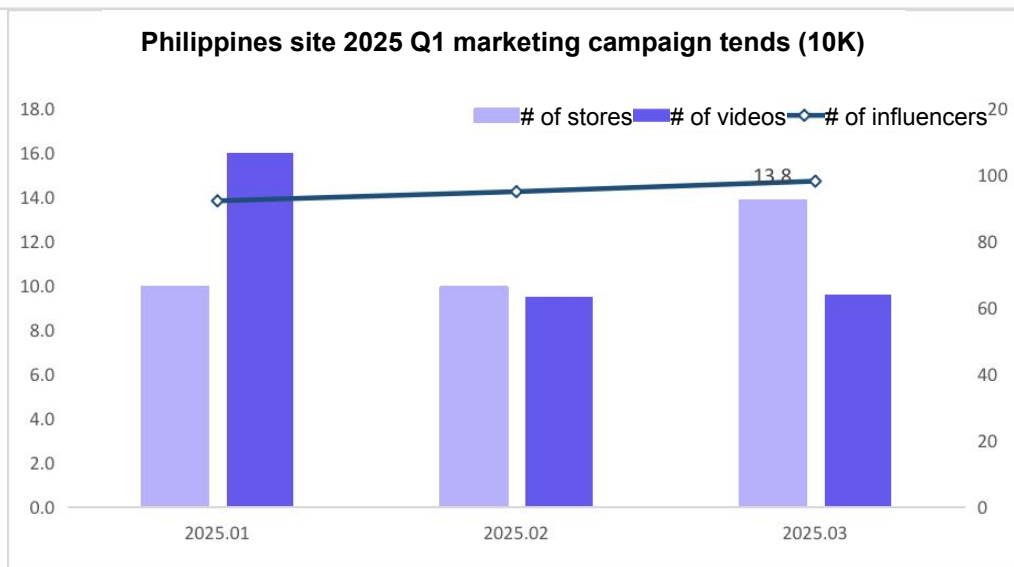
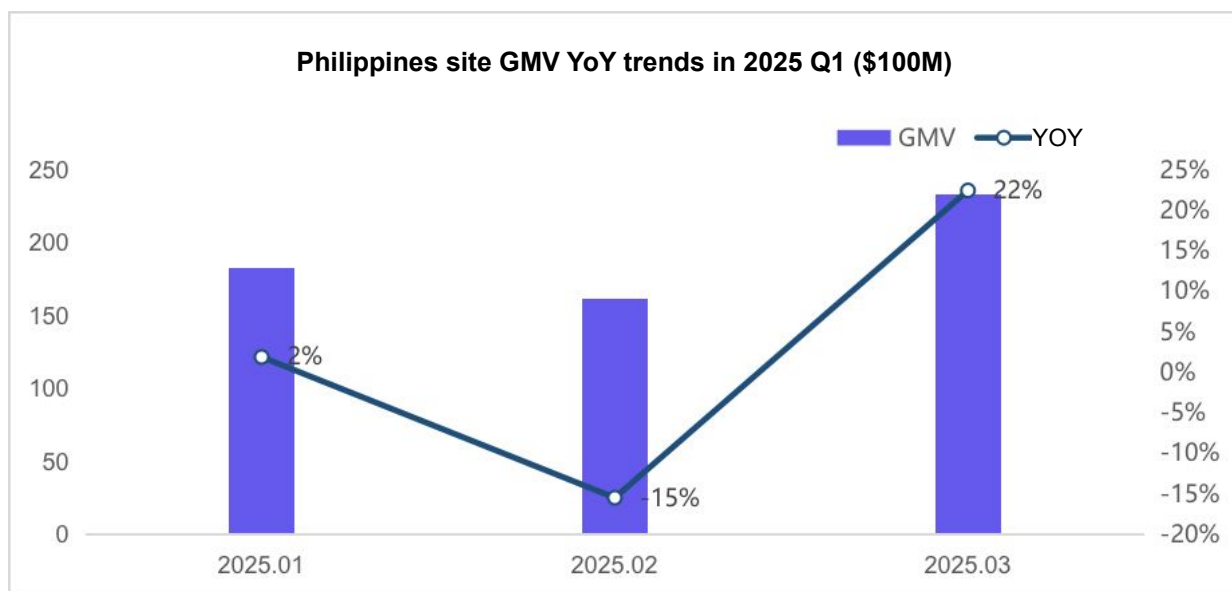
CHAPTER SIX

6

The Philippines' Total GMV Surpasses \$580 Million in 2025 Q1

Influencer Livestream is the key marketing strategies following with video content

- In Q1 2025, the Philippines' total GMV reached \$580 million, with March alone exceeding \$400 million due to Eid-related promotions. This marks a 54% year-on-year growth. Backed by 73 million active users, TikTok's market share continued to expand.
- On the marketing side, the number of small stores steadily rose to around 140,000. Creator numbers grew rapidly, reaching about 900,000 in March. With high e-commerce acceptance, live selling by creators is becoming the dominant sales method in the Philippine market.

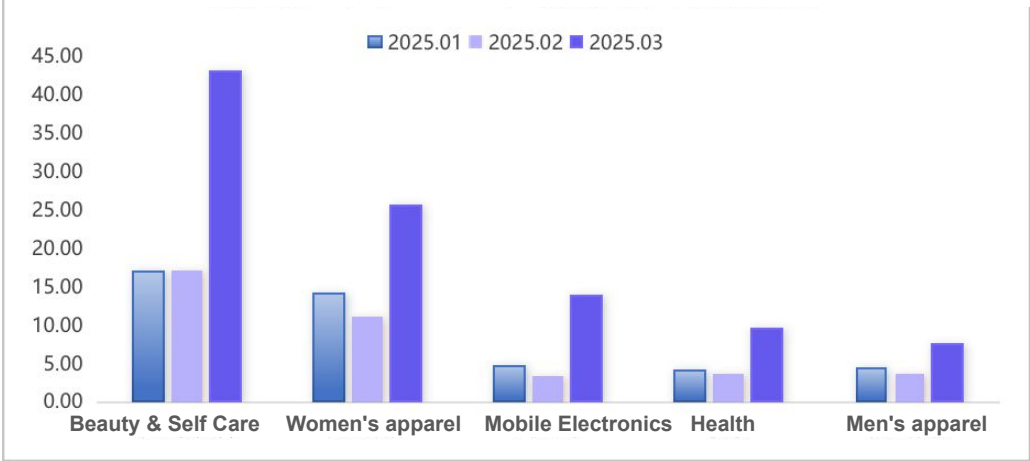


Fluctuating growth across categories in the Philippines market

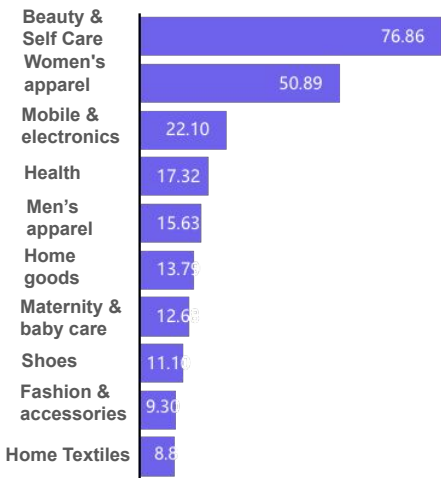
Beauty & Self Care holds the Top 1 spot with average growth across all categories

- ❑ In Q1 2025, the Philippines' top categories showed steady growth, with a notable rise in March. Beauty & Personal Care and Women's Apparel led as the top two categories, while rankings for categories in positions 3 to 5 fluctuated.
- ❑ The Top 10 categories generated around \$240 million in GMV, accounting for 41% of total Q1 GMV. Category distribution was relatively dispersed. The core consumer group—women aged 24 - 45—relies heavily on online shopping, making visually engaging categories like beauty consistently top-performing. Women's apparel, ranked second, also reflects the high online shopping activity among female users (86%), highlighting the importance of focusing on the female customer experience in the PhilLi

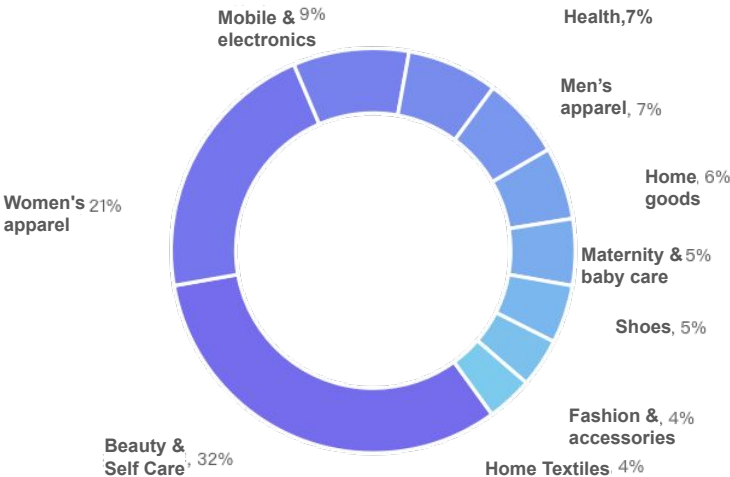
Philippines site Top 5 Category GMV trends in 2025 Q1 (\$M)



Philippines site Top 10 Category GMV (\$M)



Philippines site Top 10 Category GMV%

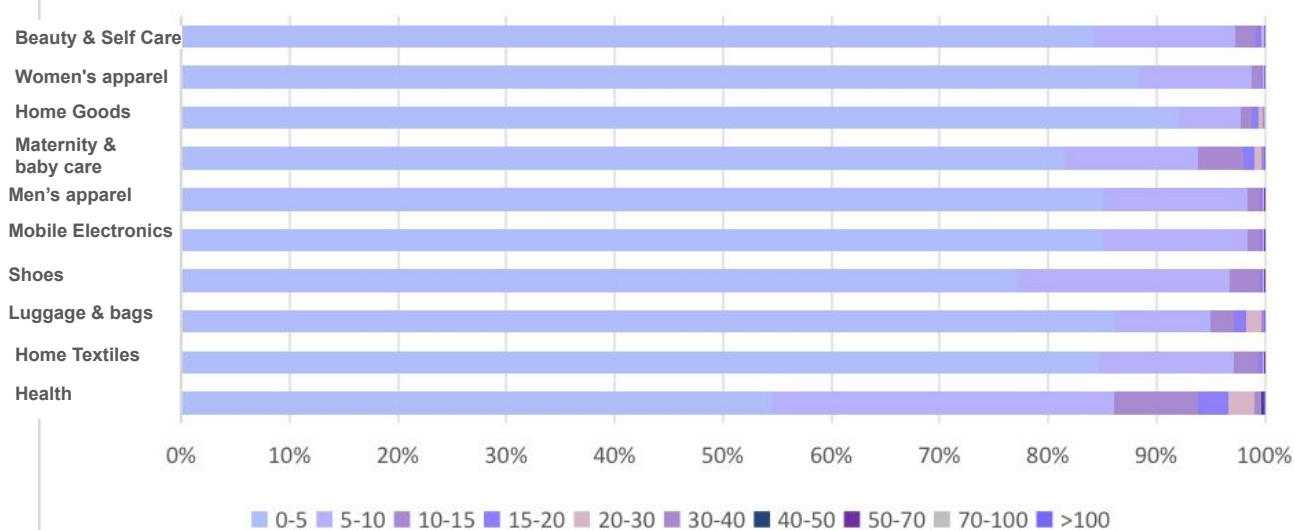


Philippines Market Driven by Low-Priced Products

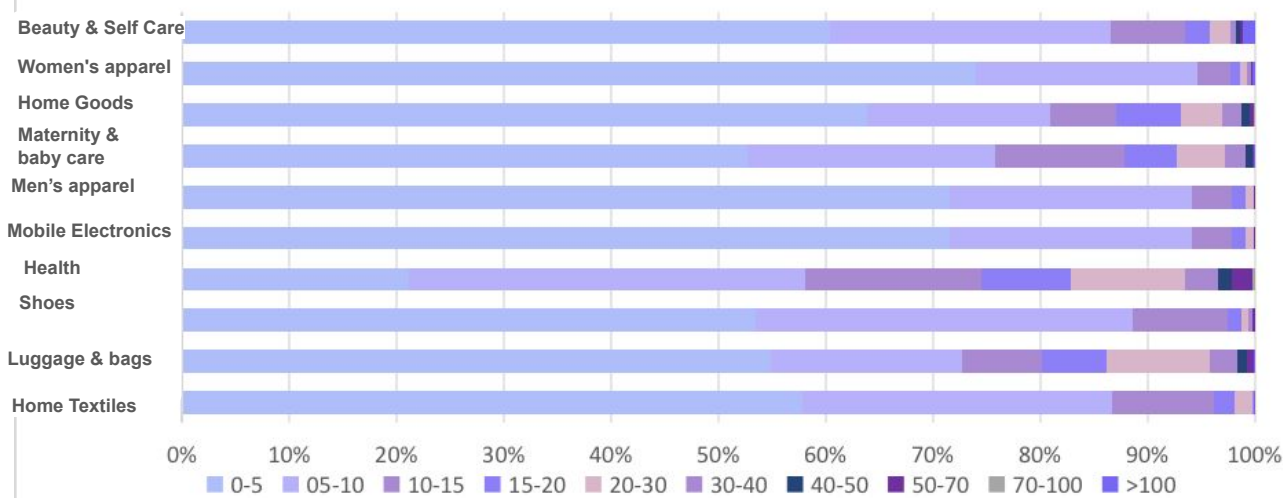
Mainstream order price range is below \$5

- ◆ In Q1 2025, the most popular products on the Philippines site were priced under \$5, accounting for 54%(health) - 92%(home goods) of sales by category. These products sold about 97 million units, making up 85% of total sales. Products under \$10 reached 111 million units, or 97% of all sales.
- ◆ For GMV, 86% came from products under \$10—61% from items below \$5, the highest share among Southeast Asian markets. Women’ s apparel, men’ s apparel, and electronics all saw over 90% of their GMV from under-\$10 products. Health stood out, with over 20% of its GMV from items above \$20. Overall, low-priced goods dominated GMV, making price competitiveness key to success in the Philippine market

Philippines site Top 10 Category Price Range % by Sales Orders in 2025 Q1



Philippines site site Top 10 Category Price Range % by GMV in 2025 Q1



Philippines Market Best-Sellers

Mar 2025 TOP5 Best-sellers



Whitening Sunscreen

store: A&J Beauty and Wellness Shop
price: \$3.72
selling amount: 460.4K
GMV: \$847.3K
of influencers: 2.8K
of videos: 7.0K



Huawei Tablet

store: HUAWEI Philippines
price: \$4.55K
selling amount: 334
GMV: \$543.5K
of influencers: 21
of videos: 39



Spring Mattress

store: Dreame Officialstore
price: \$126.07
selling amount: 11.9K
GMV: \$467K
of influencers: 152
of videos: 202



Earphones

store: HQAi
price: \$3.79
selling amount: 849.6K
GMV: \$431.2K
of influencers: 511
of videos: 1.0K



Niacinamide Whitening Soap

store: Prestige Exclusive Shop
price: \$3.2
selling amount: 844.6K
GMV: \$422.4K
of influencers: 214
of videos: 319



Singapore site



GMV Overview | TOP 10 Category GMV |
Pricing Analysis | Ranking Analysis

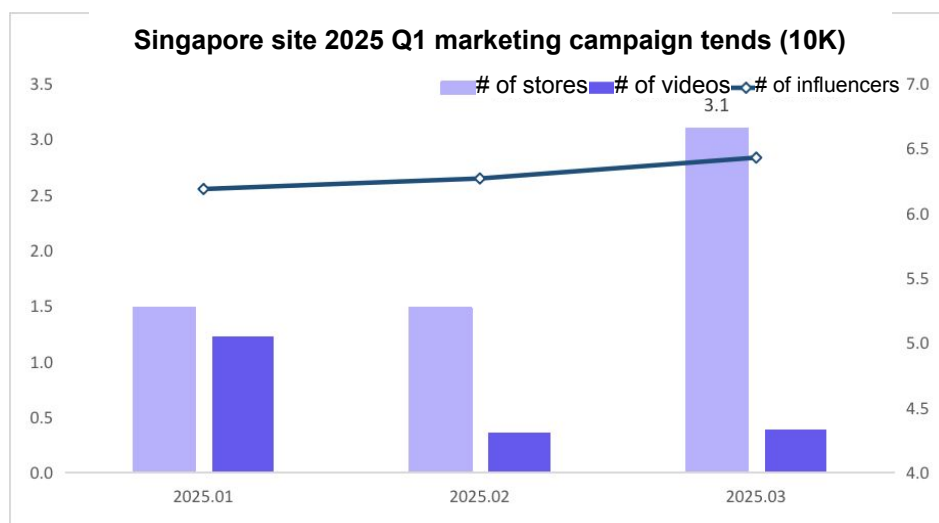
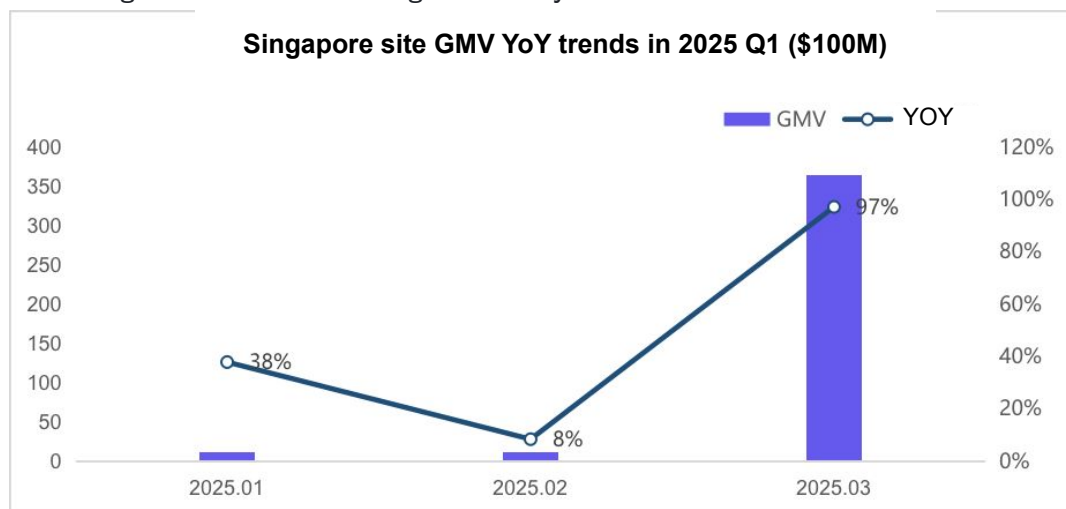


CHAPTER SEVEN

The Singapore' Total GMV Surpasses \$390 Million in 2025 Q1

Influencer Livestream is the key marketing strategies following with video content

- ❑ Overall, as a high-quality consumer market, Singapore saw rapid growth in TikTok' s market share in Q1 2025, with total GMV reaching \$390 million. It was the only Southeast Asian site with positive year-on-year monthly growth throughout the quarter, nearly doubling in March, reflecting rising market activity.
- ❑ In terms of marketing, small stores grew quickly in March, reaching 31,000—double February' s count. More merchants are joining the Singapore site, while the number of creators remained steady at around 60,000. Livestreaming became the dominant sales method, with video marketing also contributing steadily.



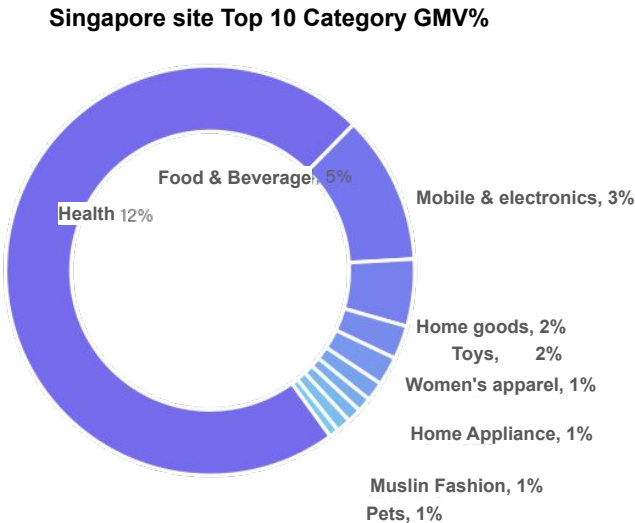
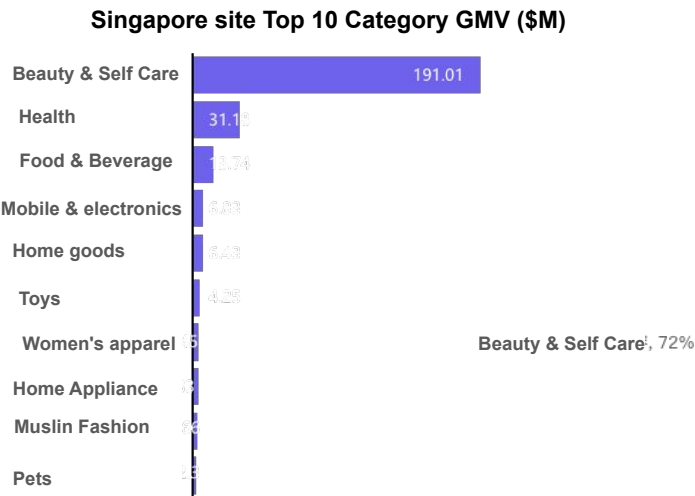
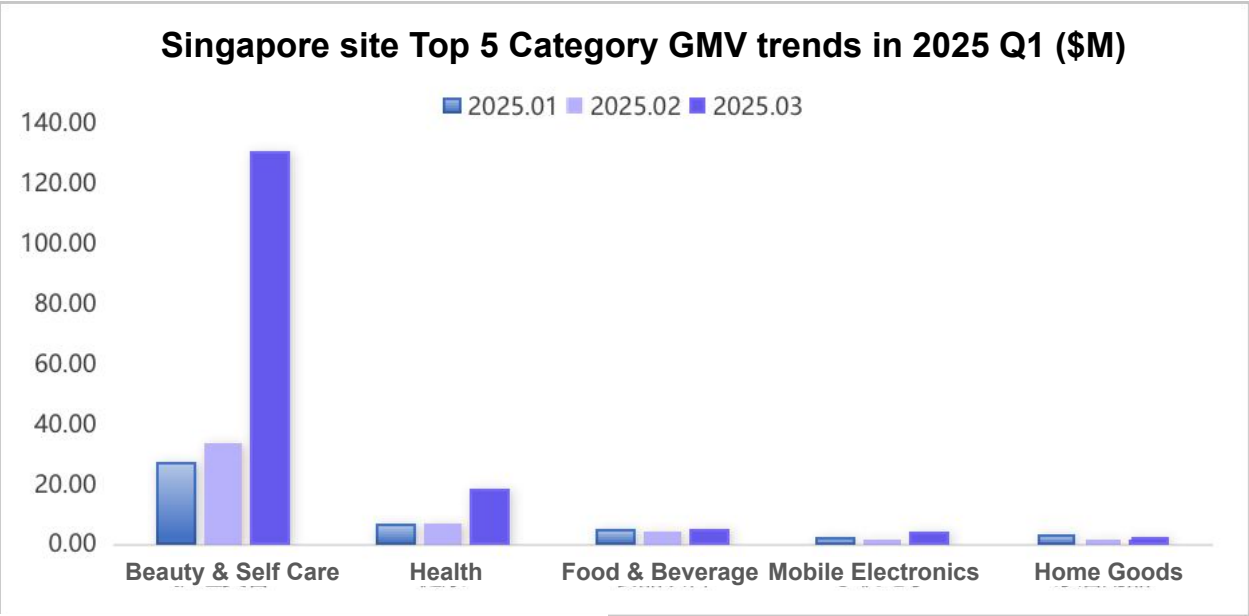
Data source: EchoTik

Singapore Shows **Varying** Growth Across Categories

Beauty & Personal Care Leads, Driven by Quality and Novelty

In Q1 2025, Singapore's top categories showed varied growth, with a clear uptick in March. Beauty & Personal Care continued to lead, while **rankings among categories in positions 2 to 5 fluctuated** .

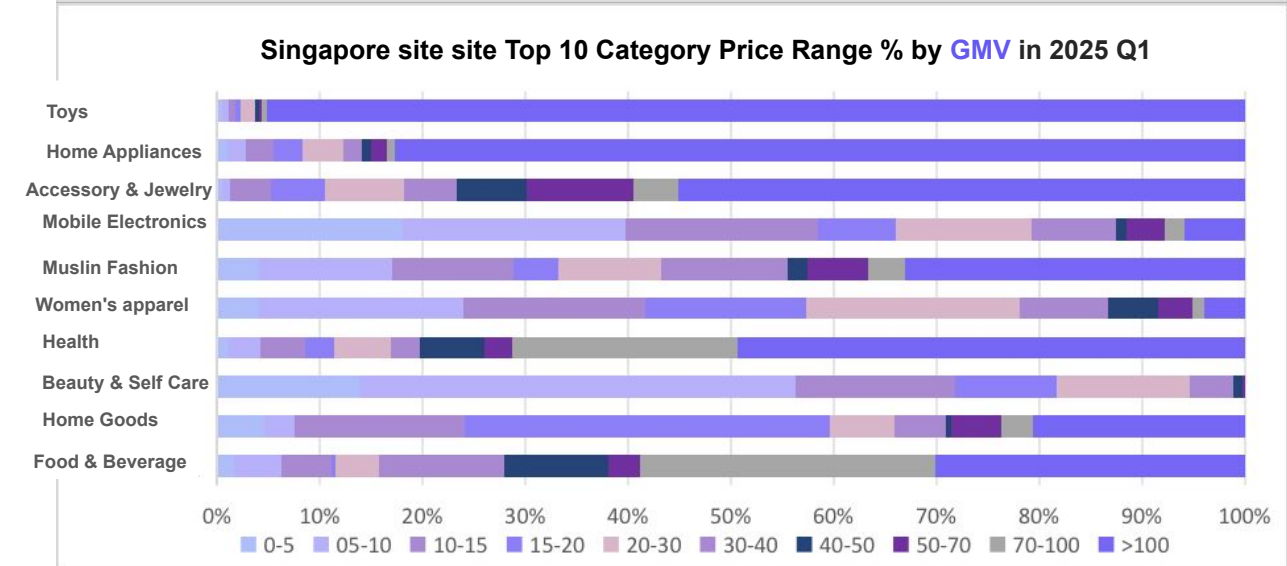
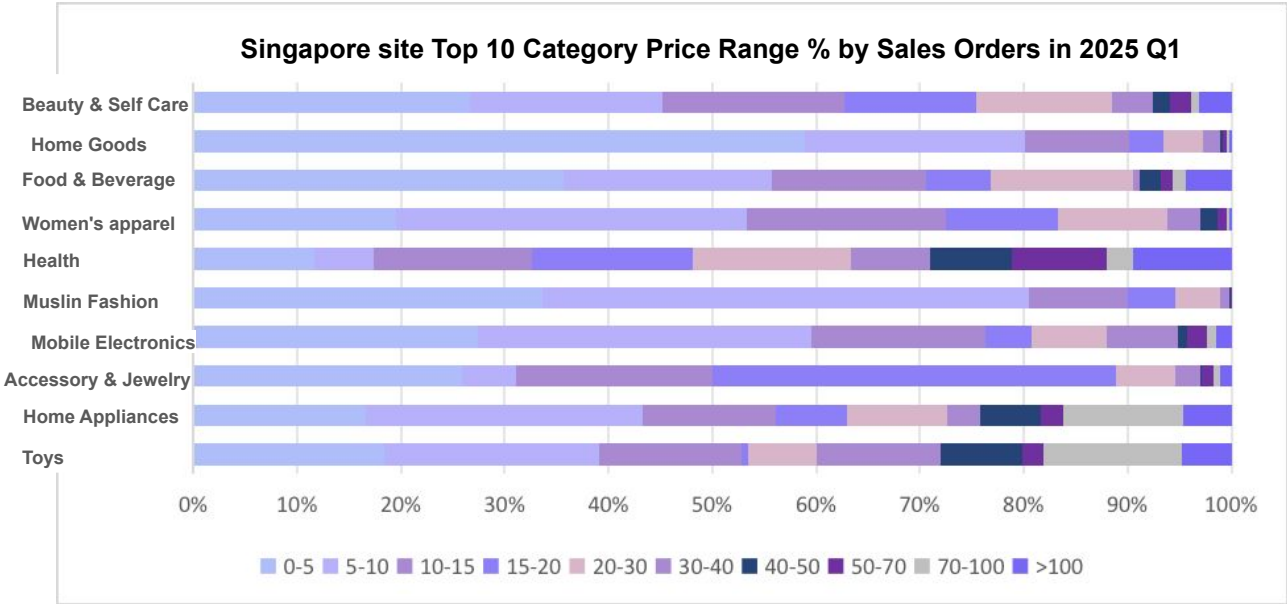
- ❑ The Top 10 categories generated about **\$265 million** , accounting for 68% of total GMV—indicating high concentration. Beauty & Personal Care benefited from influencer-driven content and vivid product displays, boosting buyer confidence and appealing to Singaporean consumers' desire for high-quality and unique products. Notably, **toys appeared among the Top 10** , unlike in other markets, reflecting local interest in novel, premium items.



Singapore Market Driven by Premium Products

Main GMV Comes from Items Over \$100

- ◆ In Q1 2025, Singaporean consumers continued to favor unique, high-quality products. While items under \$5 had the highest sales volume, category concentration was low—Home Goods had the highest share at 59%, while Health was lowest at just 11%. Products under \$10 accounted for only 570,000 units, or 57% of total sales—much lower than in other Southeast Asian markets, showing space for premium products.
- ◆ From a GMV perspective, over 83% came from items priced above \$100—more than 23 times the GMV from products under \$10 (which contributed just 3.6%). This confirms Singapore’s preference for quality and novelty. Categories like Toys and Home Appliances saw over 80% of GMV from \$100+ items, while Health and Jewelry were close to 60%. Sellers can capture market share by offering premium and branded products, especially through holiday promotions that tap into curiosity and quality-driven demand.



Singapore Market Best-Sellers

Mar 2025 TOP5 Best-sellers



Soothing Repair Face Mask

store: Lassie Manna
price: \$745.59
selling amount: 630
GMV: \$2.26M
of influencers: 0
of videos: 0



Blue Hair Care Gummies

store: UNICHI WELLNESS
price: \$55.97
selling amount: 32.2K
GMV: \$180.1K
of influencers: 78
of videos: 152



White Tomato Whitening Drink

store:PhytoPlus
Whitening
price: \$550.25
selling amount: 212
GMV: \$97.98K
of influencers: 3
of videos: 4



Pineapple Cake Snack

store:
Unknownspace.sg
price: \$20.83
selling amount: 6.8K
GMV: \$71.42K
of influencers: 33
of videos: 79



Body Wash

store: Ezcaray.Sg
price: \$22.32
selling amount: 844.6K
GMV: \$67.6K
of influencers: 49
of videos: 102

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Data Statistics Period: Jan 2024 – 2025



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