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Introduction to eCommerce in Malaysia 馬來西亞電子商務簡介

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Outline

1. Current E-commerce environment of Malaysia

馬來西亞電子商務發展近況

2. Comparing Malaysia with

馬來西亞與東協各國 / 香港之比較(國民生產毛額 / 人均國內生產總值 / 經常帳戶)

- i. Singapore
- ii. Indonesia
- iii. Thailand
- iv. Vietnam
- v. Hong Kong SAR

▶ in terms of GDP, GDP per capita & current account

3. Fulfillment Centres in Malaysia

馬來西亞倉儲管理中心

4. Conclusion

總結

Map of Malaysia 馬來西亞地理環境



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What is Greater Kuala Lumpur?

何謂“大吉隆坡”？



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Blue = Kuala Lumpur proper
藍：原吉隆坡

KLIA = Kuala Lumpur
International Airport
吉隆坡國際機場

Malaysia 馬來西亞



- ▶ TOTAL POPULATION: 31.9 million
- ▶ Area: 329,847 km²
- ▶ States: 13
- ▶ Federal Territories: Three
- ▶ GDP: US\$364 billion
- ▶ GDP per capita: US\$11,400
- ▶ Current Account 2019: +US\$7.5 billion

- ▶ 總人口：三千一百九十萬
- ▶ 總面積：三十二萬九千八百四十七平方公里
- ▶ 州數：13
- ▶ 聯邦區域：3
- ▶ 國民生產毛額：3640億
- ▶ 國民人均生產總額：11400美元
- ▶ 經常帳戶(2019)：+75億美元

The World Bank, World Development Indicators (2019)

Racial Demographics, 2019

	Bumiputera ¹	Chinese	Indians	Others
Population (millions)	20.4	6.7	2.0	0.2
Population (%)	69.3	22.8	6.9	1.0

¹ Malays, Orang Asli (natives of Peninsular Malaysia), natives of Sabah, and natives of Sarawak

Current Population Estimates, Malaysia, 2020
Department of Statistics, Malaysia



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Singapore
新加坡

Singapore



- ▶ TOTAL POPULATION: 5.7 million
- ▶ Area: 709 km²
- ▶ GDP: US\$372 billion
- ▶ GDP per capita: US\$65,200
- ▶ Current Account 2019: +US\$63.1 billion

- ▶ 總人口：五百七十萬
- ▶ 總面積：709平方公里
- ▶ 國民生產毛額：3720億
- ▶ 國民人均生產總額：65,200美元
- ▶ 經常帳戶(2019)：+631億美元

The World Bank, World Development Indicators (2019)



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Indonesia
印尼

Indonesia



- ▶ TOTAL POPULATION: 270.6 million
- ▶ Area: 1,811,570 km²
- ▶ Provinces: 34
- ▶ GDP: US\$1,119 billion
- ▶ GDP per capita: US\$4,130
- ▶ Current Account 2019: -US\$30.4 billion
- ▶ 總人口：二億七千六十萬
- ▶ 總面積：一百八十一萬一千五百七十平方公里
- ▶ 國民生產毛額：11,190億
- ▶ 國民人均生產總額：4130美元
- ▶ 經常帳戶(2019)：-304億美元



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Vietnam

越南

Vietnam



- ▶ TOTAL POPULATION: 96.5 million
- ▶ Area: 310,070 km²
- ▶ States: 58
- ▶ Municipalities: Five
- ▶ GDP: US\$262 billion
- ▶ GDP per capita: US\$2,720
- ▶ Current Account 2019: +US\$5.9 billion
- ▶ 總人口：九千六百五十萬
- ▶ 總面積：三十一萬七十平方公里
- ▶ 州數：5
- ▶ 國民生產毛額：2620億
- ▶ 國民人均生產總額：2720美元
- ▶ 經常帳戶(2019)：+59億美元

The World Bank, World Development Indicators (2019)



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Thailand

泰國

泰國



Thailand



- ▶ TOTAL POPULATION: 69.6 million
- ▶ Area: 510,890 km²
- ▶ Provinces: 76
- ▶ Administrative Areas: One
- ▶ GDP: US\$543 billion
- ▶ GDP per capita: US\$7,810
- ▶ Current Account 2019: +US\$37.9 billion
- ▶ 總人口：六千九百六十萬
- ▶ 總面積：五十一萬八百九十平方公里
- ▶ 州數：1
- ▶ 國民生產毛額：5430億
- ▶ 國民人均生產總額：7,810美元
- ▶ 經常帳戶(2019)：+379億美元

The World Bank, World Development Indicators (2019)

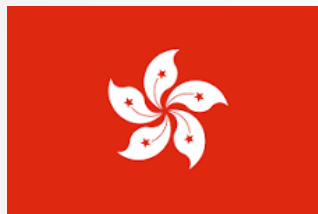


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HongKong SAR 香港



Hong Kong



- ▶ TOTAL POPULATION: 7.5 million
- ▶ Area: 1,050 km²
- ▶ GDP: US\$366 billion
- ▶ GDP per capita: US\$48,800
- ▶ Current Account 2019: +US\$22.7 billion
- ▶ 總人口：七百五十萬
- ▶ 總面積：一千零五十平方公里
- ▶ 國民生產毛額：3660億
- ▶ 國民人均生產總額：48,800美元
- ▶ 經常帳戶(2019)：+227億美元

The World Bank, World Development Indicators (2019)

Economy of Malaysia: GDP 馬來西亞國民生產毛額



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In 2019, the GDP of Malaysia was \$364.7 billion.
It represents 0.30 percent of the world economy.

2019年馬來西亞國民生產毛額為3647億美元。
佔世界總體經濟0.3%。



Statistics 數據



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	Malaysia 馬來西亞	Singapore 新加坡	Indonesia 印尼	Vietnam 越南	Thailand 泰國	Hong Kong SAR 香港
Population (millions) 人口	31.9	5.7	270.6	96.5	69.6	7.5
Area (sq. km) 面積	328,550	709	1,811,570	310,070	510,890	1,050
GDP (US\$, billions) 國民生產毛額	364	372	1,119	262	543	366
GDP per capita (US\$)國民人均生產 毛額	11,400	65,200	4,130	2,720	7,810	48,800
Current Account (US\$, billions) 經常帳戶	+7.6	+63.1	-30.4	+5.9	+37.9	+22.7



eCommerce in Malaysia

馬來西亞電子商務

Top eCommerce Marketplaces in Malaysia



1. Shopee

- Engagement by visits: 28.38 M (May-Oct2019)
- Average visit duration: 00:10:51
- Bounce Rate: 27.42%
- 2千8百萬網站造訪次數(五-十月2019)
- 平均停留時間：10分51秒
- 跳出率：27.42%



2. Lazada

- Engagement by visits: 18.39M
- Average visit duration: 00:06:58
- Bounce Rate: 32.60%
- 1千8百萬網站造訪次數(五-十月2019)
- 平均停留時間：6分58秒
- 跳出率：32.6%



3. Lelong.my

- Engagement by visits: 2.05M
- Average visit duration: 00:02:22
- Bounce Rate: 65.05%
- 2.05百萬網站造訪次數(五-十月2019)
- 平均停留時間：2分22秒
- 跳出率：65.05%

<https://cedcommerce.com/blog/top-ecommerce-sites-malaysia/>



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Other eCommerce Marketplaces in Malaysia



4. Mudah.my

- Engagement by visits: 10.42M
- Average visit duration: 00:08:34
- Pages per visit: 11.93
- 1千42萬網站造訪次數(五-十月2019)
- 平均停留時間：8分34秒
- 拜訪頁數：11.93



5. eBay

- Engagement by visits: 754.56k
- Average visit duration: 00:06:17
- Pages per visit: 7.49
- 75萬4千網站造訪次數(五-十月2019)
- 平均停留時間：6分17秒
- 拜訪頁數：7.49



6. ezbuy

- Engagement by visits: 504.09K
- Average visit duration: 00:05:10
- Pages per visit: 5.72
- 50萬4千網站造訪次數(五-十月2019)
- 平均停留時間：5分10秒
- 拜訪頁數：5.72



Lazada



Cost = Commission Fee + Payment Fee + Shipping Fee (offset by shipping income)

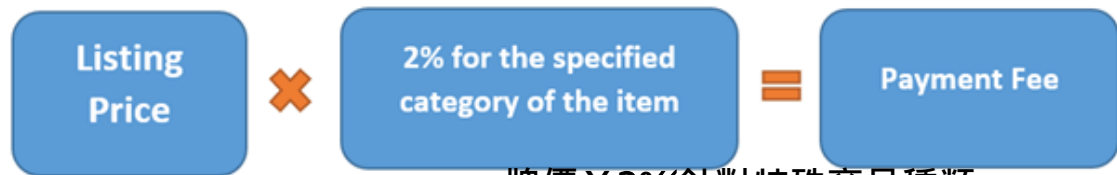
成本 = 仲介費 + 固定支付 + 運費(與運費收入抵消)

1) Commission Fee 仲介費 (ZERO %)



牌價 $\times$ 仲介費率(依不同商品費率而定)

2) Payment Fee 固定支出(2%)



牌價 $\times$ 2%(針對特殊商品種類)

*Note : The commission and payment fees are subject to SST @ prevailing rate which is currently 6%.
另外增加6%銷售及服務稅

3) Shipping Fee

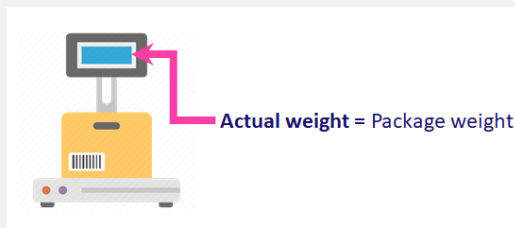
- Determined by **origin** and **destination** location, **chargeable weight**, and **courier**
- Typically RM3.5-14 (US\$ 0.8-3)
- Chargeable weight is the **greater** of actual and dimensional weight

運費

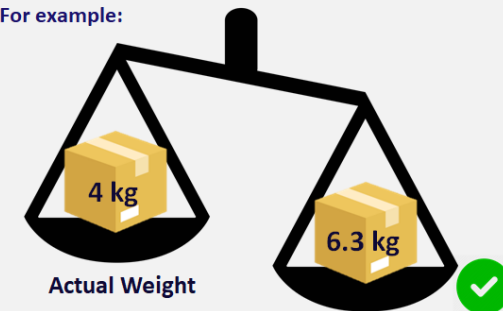
依運送地點,重量和快遞公司而定。

約介於0.8-3美元間。

如遇材積/重量以材積為準。



For example:



Actual Weight	Dimensional Weight
Actual weight: 4 kg	
Volumetric weight: $(25 \times 30 \times 50) / 6,000 = 6.3\text{kg}$	
Chargeable weight: 6.3kg	

Cost = Commission Fee + Payment Fee + Shipping Fee (offset by shipping income)

1) Commission Fee (ZERO %)



2) Payment Fee (2%)



*Note : The commission and payment fees are subject to SST @ prevailing rate which is currently 6%.

3) Shipping Fee

- Seller can choose to enroll in Shopee's "Free Shipping Program" or fulfill orders independently

	Shopee Supported Logistics	Non-Shopee Supported Logistics
Arrange Shipment	Sellers can arrange shipment on app and Seller Centre	Sellers have to arrange for their own shipment
Tracking Number	Automatically shared on Shopee system	Sellers have to input tracking number
Pick Up Done	Logistics partners will send "pickup done" notification	Sellers have to click the Ship button to send a "pickup done" notification
Tracking Details	Shown on Shopee system	Sellers and shoppers to track on other logistics platform
Air Waybill	Sellers can use Shopee system to print air waybill	Sellers cannot use Shopee system to print air waybill
Shipping Fee Calculation	Auto-calculated by the system	Manual Input



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	Lazada	Shopee	Lelong.my
Business Model 商業模式	B2C	B2C and B2B	B2C, C2C
Market Presence 地點	MY/SIN/TH/ PH/VN/ID	MY/SIN/TH/PH/VN/ ID/TW	Malaysia only
Monthly visits (millions, 2019) 每月造訪次數	20.09	22.33	3.20
Product Categories 產品類別	General 一般	General	General
New Product Approval 新產品批准許可	Approval needed 需要	Instantaneous 立即	Instantaneous
App/Google Play Store Ranking # App商店排名	2	1	7
# of Social Media Followers (millions) 社交軟件關注人數	29.35	16.06	0.42

B:業者
C:消費者
MY: 馬來西亞
SIN:新加坡
TH:泰國
VN:越南
ID:印尼



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	Lazada	Shopee	Lelong.my
Annual Fee (MYR) 年費	0	0	398–498
Commission Fee 仲介費	ZERO	ZERO	0.3–8%
Payment Fee 服務費	2%	2%	2.5–3.5%
Logistics 運輸	Lazada Partner with Local Logistics Providers	Can use own Logistics Providers & Shopee Logistics Service (SLS)	Can use own Logistics Providers
Cross Border Initiative 跨境服務	Yes	Yes	No
Ownership 所屬公司	Alibaba majority-owned	Sea Ltd	Interbase Resources Sdn. Ltd



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	Lazada	Shopee	Lelong.my
Payment Method to Seller 買家付款方式	Direct bank transfer after 2 weeks 直接轉帳 (2週後到帳)	Transfer to Shopee Wallet upon buyer received of item and credit after 3 days 轉帳至SHOPEE錢包 (3天後到帳)	Direct bank transfer after 1 week 直接轉帳(一週後到帳)
Direct Import? 商品為直接進口	Yes	Yes	No

Fulfillment Centres in Malaysia

馬來西亞倉儲管理中心

Suggestion:

- 4 or 5 Hong Kong company to set up a fulfillment centre on SHARING BASIS
- Reduce Risk and Reduce Cost
- Volume in Malaysia not likely to be substantial

- 建議4-5間香港公司共同建立一間倉儲管理中心
- 減少成本跟風險
- 馬來西亞進出口量不高





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- A semi-detached industrial warehouse say of 7,000 sf
- Hire 1 manager and 2 pickers
- Try without major investment



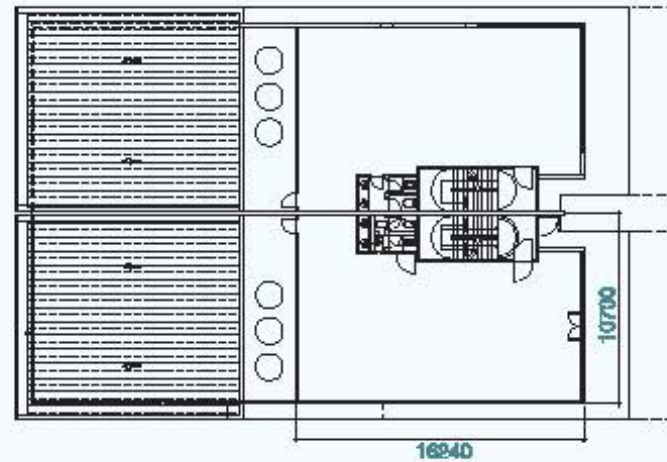
- 約7000平方呎的半獨立式倉庫
- 聘用一個管理者與兩個裝運工
- 不需大規模投資



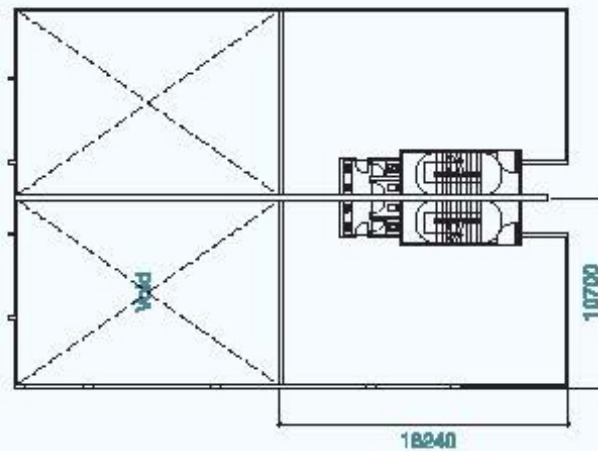


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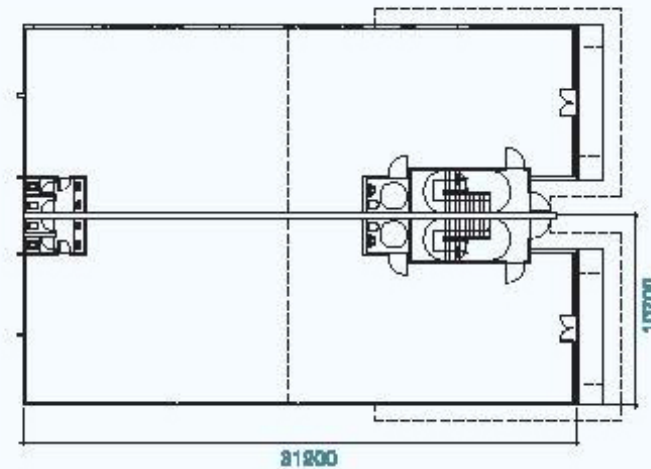
Floor Plan



Second Floor Plan - Type A2



First Floor Plan - Type A2



Ground Floor Plan - Type A2



Malaysia E Commerce Fulfilment Centre

Exchange Rate:

0.534

**MAYCHAM**
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RM

Deposits	Security deposit 2 month rent + Advance Rent	33,000
Deposits	TNB security Deposit (2 month usage)	2,000
Deposits	Water Deposit	300
Deposits	Internet + Telephone Ac + Deposit	800
Office Setup	Attendant Machine	300
Office Setup	Computer x 3	9,000
Office Setup	Furniture File Storage	6,000
Office Setup	Furniture Table Chair	2,000
Office Setup	Networking set up	3,000
Office Setup	Printer x 2	1,600
Office Setup	Stationary and other	1,000
Office Setup	Thermal Printer	500
Warehouse Setup	70 nos Warehouse Storage Rack (2.1m x 1.8m x 0.45m) H x L x D with transport & Installation	20,000
Warehouse Setup	2 nos Magnetic Glass Door	6,000
Warehouse Setup	8 Channel CCTV + Monitor (32 inch)	5,000
Warehouse Setup	Air cond x 3 with Wiring and Installation	5,000
Warehouse Setup	Alarm	6,000
Warehouse Setup	Laminate Floring	12,000
Warehouse Setup	Lighting and Wiring for Office	20,000
Warehouse Setup	Lighting and Wiring for Ware House	2,000
Warehouse Setup	Painting and Touch up office area	4,000
Warehouse Setup	Signage	500
Warehouse Setup	Steel Grill for door	2,000
	One Time Initial Investment	142,000
	In HKD	265,918
	Divide by 5 (HKD)	53,184



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Malaysia E Commerce Fulfilment Centre

Exchange Rate: 0.534

Monthly Operating Expenses(RM)	Yr 2020	Yr 2021	Yr 2022	Remark / Note
Rental	11,000	11,000	11,000	
1 Manager	7,000	7,351	7,720	5% Increment
2 Supporting Executive	5,000	5,251	5,515	5% Increment
EPF (12%)	1,440	1,512	1,588	
SOCSSO	140	140	140	
Electricity	1,000	1,000	1,000	
Internet+Telephone	249	249	249	Speed : 300Mbps (300Mbps download/upload 50Mbps)
Water	100	100	100	
Secretary Fees	100	100	100	
Tax and Audit Fees	600	600	600	
Stationary and other	200	250	300	
Miscellaneous	2,000	2,000	2,000	
Per Month (RM)	28,829	29,553	30,311	
Per Year	345,948	354,639	363,734	
HKD per year	647,843	664,118	681,150	
Share by (HKD) per year	5 129,569	132,824	136,230	

Q&A session

Thank you!