



ZALORA

SE ASIA ONLINE SHOPPING

November 2020

Agenda

1. Introduction to Zalora
2. Indonesia Market
3. Online Retail Stats



ZALORA

INTRODUCTION TO ZALORA

Zalora Indonesia Positioning

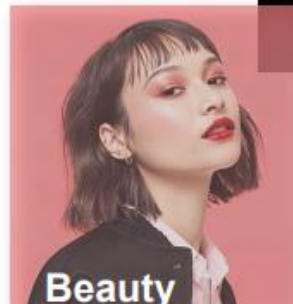


OVER 2000 BRANDS

ZALORA



CATEGORIES @ ZALORA



ZALORA
INDONESIA



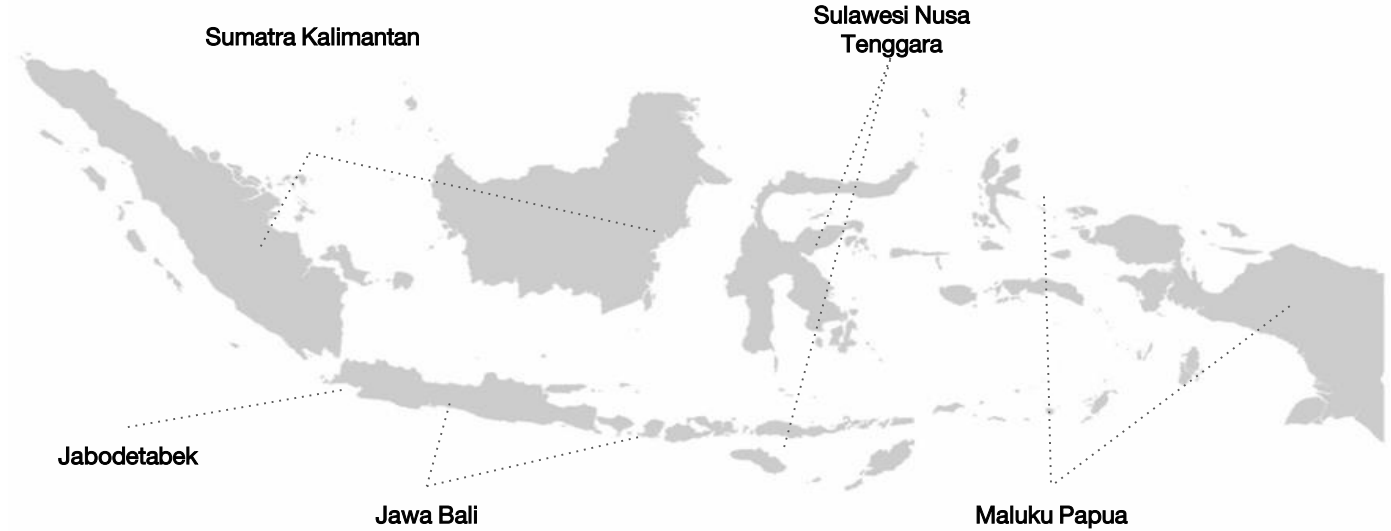
International Marketplace from
Hong Kong to Singapore,
Malaysia, Philippines,
Indonesia

Indonesia



Market

250m Population and 12,000 Islands



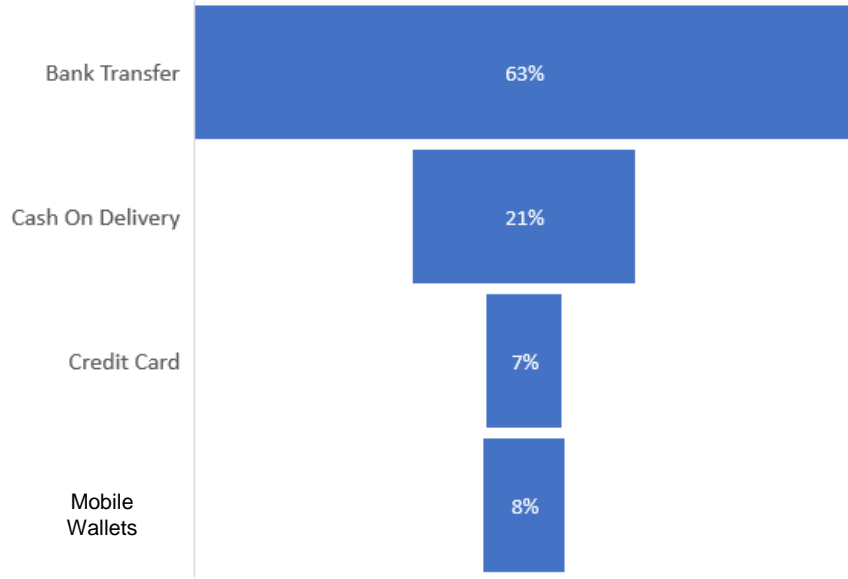
We provide multiple delivery partners to optimize speed, quality and cost.

What Consumers Are Looking for Shopping Online

Top reason for choosing a website as being the most preferred



Payment Methods in Indonesia



Low credit card penetration is a major reason why consumers use portals/webs to purchase.

ZALORA OFFERS AN END TO END CUSTOMER EXPERIENCE



ASSORTMENT

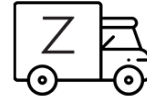
Asia's #1 Online Fashion Destination.

Over 2,000 Intl & local brands.



SIMPLE AND SAFE WEBSITE + APP

Easy navigation and intuitive content



FREE SHIPPING*

Trusted logistics partners deliver anywhere in Indonesia



FLEXIBLE PAYMENTS

Cash On Delivery
Bank Transfer / VA
Credit Cards
Gopay



CUSTOMER SERVICE BY ZALORA

Monday - Saturday



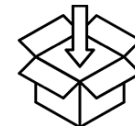
EVERYWHERE

Nationwide access to rural areas & untapped markets



SOCIAL MEDIA PRESENCE

Stay connected through newsletters, social media & blogs



FREE RETURNS*

30 days return policy*
Quality Control before Return to sellers

**T&C Applied*

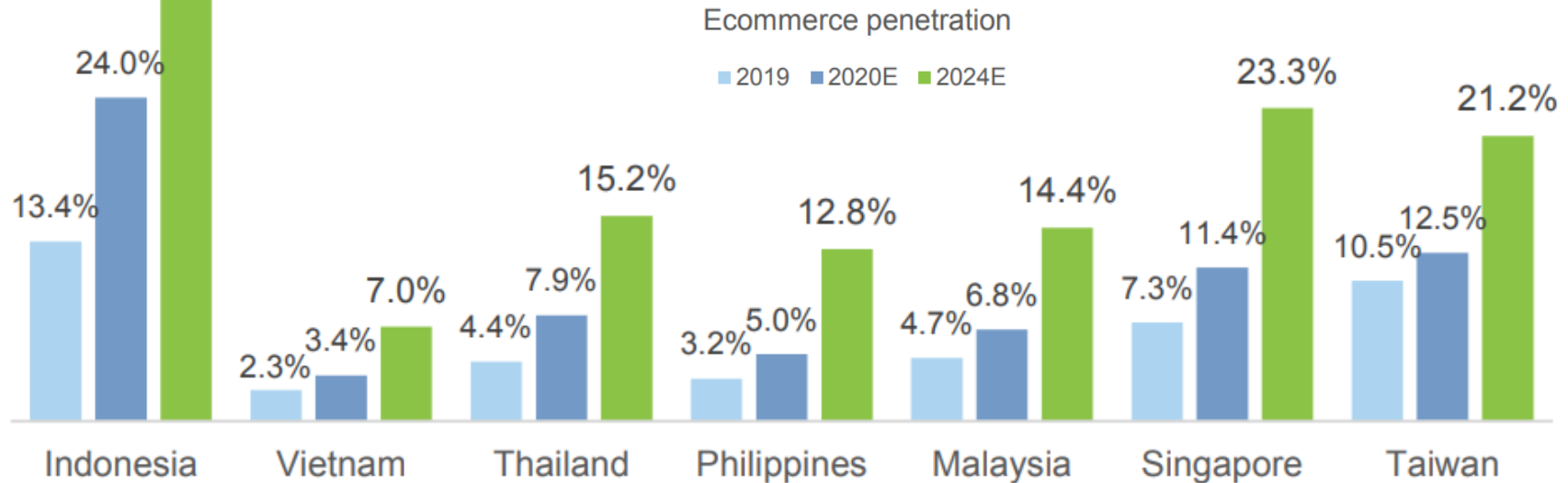


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ONLINE RETAIL STATS

Ecommerce Penetration to Grow the Fastest in Indonesia

Ecommerce demand to pull forward given the COVID-19 impact, with Indonesia's ecommerce market leading the region, with penetration expected to rise from 24.0% in 2020 to 41.2% by 2024E. Other countries are also expected to see significant uplift ahead.



Ecommerce Penetration to Grow the Fastest in Indonesia

Ecommerce as a % of Total Retail	2017	2018	2019	2020E	2021E	2022E	2023E	2024E
Regional estimates								
United States	12.7%	13.7%	15.2%	19.0%	21.5%	24.8%	28.0%	30.6%
North America	12.2%	13.3%	14.8%	18.4%	20.8%	24.0%	27.0%	29.5%
Rest of Western Europe	7.6%	8.4%	9.2%	11.2%	11.9%	12.6%	13.3%	13.9%
United Kingdom	16.3%	18.0%	19.1%	22.8%	24.3%	25.8%	27.3%	28.5%
Rest of Eastern Europe	5.2%	6.0%	6.8%	7.9%	8.5%	9.1%	9.6%	10.0%
Russia	4.9%	6.1%	7.2%	8.8%	9.7%	10.8%	11.9%	12.9%
Europe	8.1%	9.1%	10.0%	12.0%	12.8%	13.6%	14.4%	15.0%
Mainland China	17.4%	21.1%	23.4%	27.8%	30.6%	33.5%	36.1%	38.6%
Japan	5.8%	6.2%	6.8%	8.2%	8.5%	9.1%	9.7%	10.4%
South Korea	22.6%	26.4%	31.4%	39.8%	42.2%	44.2%	45.3%	46.8%
India	3.6%	4.1%	4.7%	5.6%	6.8%	7.9%	9.2%	10.7%
Australia	5.4%	5.7%	6.5%	8.9%	9.5%	10.0%	10.5%	11.0%
Taiwan	9.8%	11.5%	13.1%	14.5%	16.0%	17.7%	19.4%	21.2%
Indonesia	3.0%	7.7%	13.4%	24.0%	30.4%	35.4%	39.0%	41.2%
Rest of Southeast Asia	2.4%	3.1%	4.1%	6.5%	8.0%	9.5%	11.1%	12.6%
Rest of Asia	4.9%	5.5%	5.9%	6.6%	6.9%	7.3%	7.7%	8.0%
APAC	12.8%	15.4%	17.2%	20.7%	23.0%	25.3%	27.3%	29.3%
Brazil	5.5%	6.2%	7.0%	9.7%	11.2%	12.9%	14.4%	15.2%
Rest of Latin America	3.2%	3.8%	4.5%	6.4%	7.1%	8.2%	9.0%	9.6%
LatAm	4.2%	4.8%	5.6%	7.7%	8.7%	10.1%	11.1%	11.7%
Middle East & Africa	1.2%	1.4%	1.7%	2.0%	2.2%	2.4%	2.6%	2.8%
Total	10.6%	12.4%	13.9%	16.8%	18.7%	20.7%	22.4%	23.9%

Source: Company data, Census Bureau, Euromonitor, IBGE, IPCA, AKIT, Japan METI, iResearch, NBS China, UK Office of National Statistics, Goldman Sachs Global Investment Research