



跨境电商

让中亚与中国经贸发展带来的机遇

Cross-border E-commerce

Bringing Opportunities for Economic and Trade  
Development between Central Asia and China

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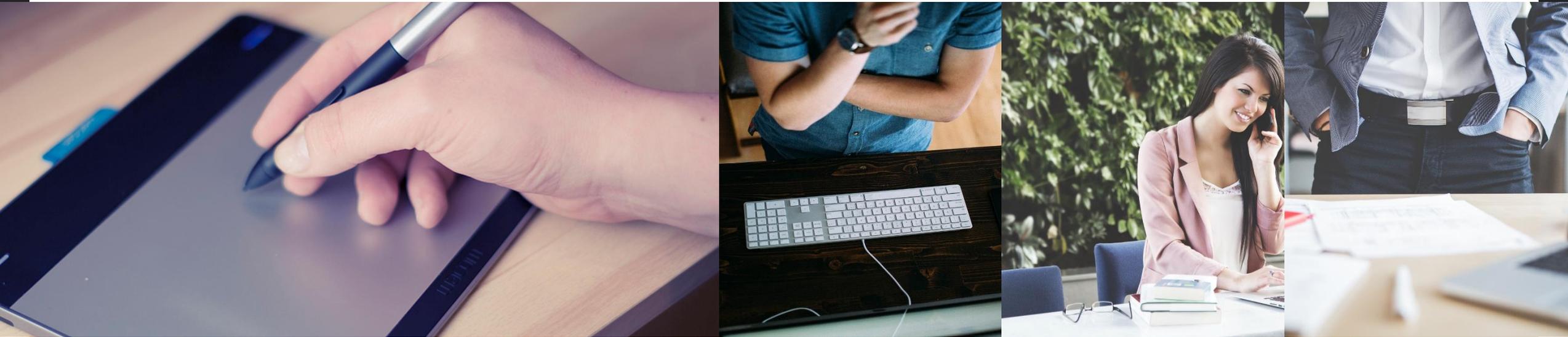
**A graduate from Alibaba Business College**

## 一、中国跨境电子商务状况

### I. Status of Cross-Border E-Commerce in China

“打造电子商务国际大通道”“建立便利跨境电子商务等新型贸易方式的体制”，使跨境电商成为电商行业的焦点，也成为国际贸易适应网络商业并极具发展潜力的新方式和新手段。2020年中国跨境电商市场规模达12.5万亿元，同比增长19.04%，预计2021年市场规模将达14.6万亿元。

"Creating an international channel for e-commerce" and "establishing a system to facilitate cross-border e-commerce and other new forms of trade" have made cross-border e-commerce become the focus of the e-commerce industry, as well as new and highly potential approach and means for international trade to adapt to network commerce. The size of China's cross-border e-commerce market reached RMB 12.5 trillion yuan in 2020, up 19.04% YoY, and is expected to reach RMB 14.6 trillion yuan in 2021.



## 二、中国跨境电子商务模式

### II. China's Cross-Border E-Commerce Model

中国跨境电商占外贸进出口比例为17%;而跨境电商商业模式主要分为B2B、B2C两种,其中,跨境电商B2B模式是外贸主流。数据显示,跨境电商90%是B2B模式,零售部分仅占外贸进出口较小比例。艾媒咨询分析师认为,随着移动互联网技术的发展、智能手机普及、网络购物的兴起以及在线支付、物流体系的逐步完善,跨境电商零售B2C、C2C模式增长势头强劲。

China's cross-border e-commerce accounts for 17% of the country's foreign trade imports and exports; China's cross-border e-commerce business model is mainly divided into B2B and B2C, of which, the B2B model is the mainstream in foreign trade. Data shows that 90% of cross-border e-commerce is B2B model, while retail only accounts for a relatively small proportion of foreign trade imports and exports. Analysts at iiMedia Research believe that with the development of mobile Internet technology, the popularity of smart phones, the rise of online shopping and the gradual improvement of online payment and logistics system, retail B2C and C2C models in cross-border e-commerce will see a strong growth momentum.

## 三、跨境电商用户分析

### III. Analysis of Cross-Border E-Commerce Users

2021年中国跨境电商用户偏好购买服饰鞋包(48.7%)、美妆个护(45.9%)及食品饮料(43.4%)等商品。

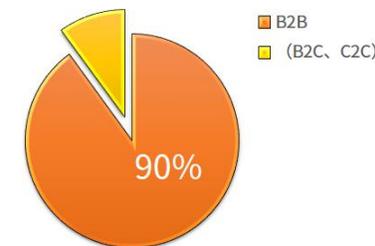
In 2021, China's cross-border e-commerce users have preferred to buy such commodities as apparel, shoes and bags (48.7%), beauty and personal care (45.9%) and food and beverages (43.4%).

## 中国跨境电商商业模式数据分析

2019-2020年中国跨境电商占外贸进出口比例  
The proportion of cross-border e-commerce in foreign trade imports and exports in 2019-2020

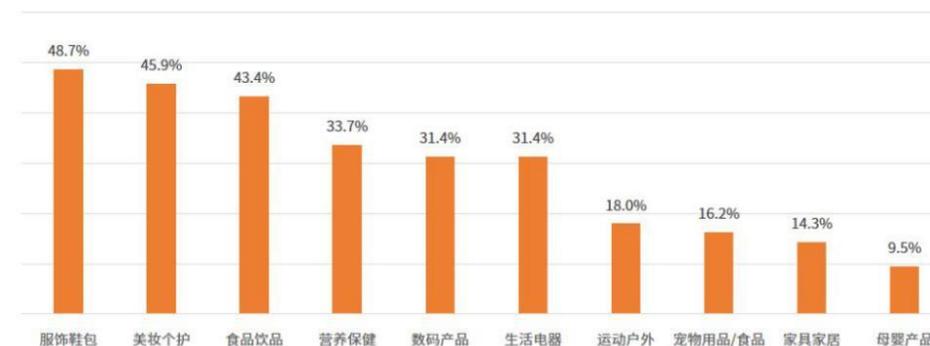


2019-2020年中国跨境电商运营模式占比  
Proportion of Chinese cross-border e-commerce operation models in 2019-2020



## 2021中国跨境电商用户购买商品数据分析

2021中国跨境电商用户主要购买商品情况  
2021 Chinese cross-border e-commerce users' main purchases



数据来源: 艾媒数据中心 (data.iimedia.cn)

样本来源: 草莓派调查与计算系统 (Strawberry Pie)  
样本量: N=1266; 调研时间: 2020年4月

## 四、全球区域跨境电子商务发展概况

### IV. Profile of Global Regional Cross-Border E-Commerce Development

#### 1. 东南亚五国

##### 1. Five countries in Southeast Asia

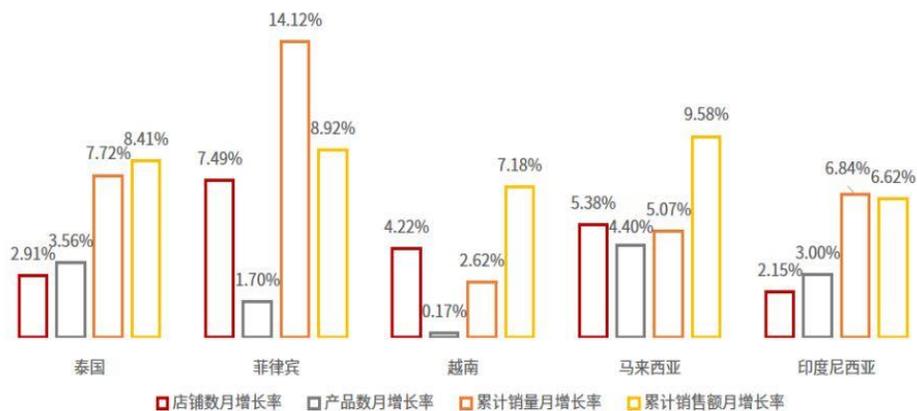
2021年3月东南亚地区五国Shopee月增长率情况：作为东南亚地区的主要的电商购物平台，数据显示，2021年3月Shopee在东南亚五国中，店铺月增长率最高为菲律宾(7.49%);产品数月增长率最高为马来西亚(4.40%);累计销量月增长率最高为菲律宾(14.12%);累计销售额月增长率最高为马来西亚(9.58%)。可见菲律宾和马来西亚的电商发展有较强的后劲。

In March 2021, Shopee's monthly growth rates in five countries in Southeast Asia: As a key e-commerce platform in Southeast Asia, Shopee, as the data shows, saw its highest monthly growth rate in stores in the Philippines (7.49%) among five countries in Southeast Asia; the highest monthly growth rate in the number of products in Malaysia (4.40%); the highest cumulative monthly growth rate in sales in the Philippines (14.12%); and the highest cumulative monthly growth rate in sales volume in Malaysia (9.58%). It could be seen that the Philippines and Malaysia have strong momentum in terms of e-commerce development.

#### 2021年3月东南亚地区五国Shopee月增长率情况



2021年3月东南亚五国Shopee月增长率情况  
Monthly growth rate of Shopee in five Southeast Asian countries in March 2021



数据来源：艾媒数据中心 (data.iimedia.cn)

艾媒报告中心: report.iimedia.cn ©2021 iiMedia Research Inc

## 2. 拉美地区

### 2. Latin America

2021拉美地区零售额及增长率数据分析数据显示，2019年拉丁美洲的零售额达到2.09万亿美元，同比增长5.3%，成为全球第四大零售市场。艾媒咨询研究发现，由于拉美地区轻工业发展缓慢，供消费者选择的商品品类较少，许多消费者选择通过跨境电商购物。消费者对外国产品的高度需求和互联网普及率的提升使得拉丁美洲的电商发展非常迅速，成为世界上电商规模增长最快的地区。预计到2021年，拉美市场的零售额将攀升至2.27万亿美元。

In 2021, analysis data of Latin America's retail sales and growth rate shows that Latin America's retail sales reached \$2.09 trillion in 2019, up 5.3% YoY, making it the world's fourth-largest retail market. iiMedia Research found that, due to the slow development of the light industry in Latin America, there are fewer categories of goods for consumers' choice, and many of them have chosen to shop through cross-border e-commerce. The high consumer demand for foreign products and the increased Internet penetration have led to the rapid growth of e-commerce in Latin America, making it the world's fastest-growing region in terms of e-commerce scale. The retail sales in the Latin American market are expected to rise to \$2.27 trillion by 2021.

### 2021拉美地区零售额及增长率数据分析



2016-2022年拉美地区零售额及增长率  
Latin America's retail sales and growth rate 2016-2022



数据来源: eMarketr, 艾媒数据中心 (data.iimedia.cn)

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### 3.东欧新兴市场

#### 3. Emerging Markets in Eastern Europe

随着中俄两国跨境电商的发展，以及速卖通平台的强势加入，俄罗斯作为东欧最大且最具跨境电商市场价值的国家，开始逐渐成为中国跨境电商卖家的“蓝海市场”，同时也带来了新的机遇与新的挑战。

**With the development of cross-border e-commerce between China and Russia, and the strong entry of the AliExpress platform, Russia, as the largest and most valuable cross-border e-commerce market in Eastern Europe, has gradually become a "blue ocean market" for Chinese cross-border e-commerce sellers, which has also brought new opportunities and challenges.**

## 2021年中国跨境电商发展趋势：东欧新兴市场（一）



俄罗斯跨境电商市场的潜在机遇

1. 人口结构：俄罗斯有60.8%的人口是青年人，女性多于男性。庞大的年轻消费群体和女性主力群体必然带来巨大的购买力。
2. 消费行为：俄罗斯的线上购物习惯已经养成，各联邦区的线上消费人群占比都在64%以上。
3. 消费品类：俄罗斯网购商品中，排在第一位的是鞋服，占32%；家电用品占17%，这些都是中国制造的强项。



#### 四 中亚区域国家电子商务发展建议

#### IV Recommendations for the Development of E-Commerce in Central Asian Countries

##### (一) 跨境电子商务人才培养项目”的实施

##### (I) Implementation of the "Cross-Border E-Commerce Talent Training Program"

1. 跨境电子商务人才培养的思路。社会培训机构在培养接近市场的初级人才方面具有不可替代的优势，高校所培养的人才具有可持续发展的优势。跨境电子商务作为新型国际贸易方式，潜力无限，短期而言，其所缺乏的是从事具体操作的人才，但从长期来看，具有可持续发展性的复合型人才是关键。

1. Thinking of cross-border e-commerce talent training. Social training institutions have an irreplaceable advantage in training junior talents close to the market, while talents trained by colleges and universities have the advantage of sustainable development. As a new model of international trade, cross-border e-commerce has unlimited potentials, but in the short term, what it lacks are talents for specific operations, while in the long term, it's key for the sector to have inter-disciplinary talent talents with sustainable development.

2. “跨境电子商务人才培养项目”的内容。应用型本科院校“跨境电子商务人才培养项目”包括两个层次：一是面向社会和在校学生的短期培训班，采取线上学习、在平台进行模拟操作、在线考试的形式，培训结束后颁发培训证书；二是以本科院校的电子商务专业和研究生学学历教育。

2. Content of the "Cross-Border E-Commerce Talent Training Program" The applied "Cross-border E-Commerce Talent Training Program" for undergraduate institutions includes two levels: first, short-term training courses for the society and on-campus students in the form of online learning, simulation operation on the platform and online examination, with the training certificate issued after the completion of the training courses; second, degree education and graduate studies of e-commerce disciplines in undergraduate institutions.

3. “跨境电子商务人才培养项目”的实施。跨境电子商务培训班。短期培训班以职业培训为主，高校可以与跨境电子商务平台和企业合作，以平台为基础，构建学习板块和实操训练内容。

3. Implementation of the "Cross-Border E-Commerce Talent Training Program". Cross-border e-commerce training course. Short-term training courses are mainly vocational training, and colleges and universities can cooperate with cross-border e-commerce platforms and enterprises to build learning modules and practical training content based on the platforms.

##### (二) 文化项目IP打造

##### (II) IP Creation of Cultural Programs

中国5G网络已经覆盖，以直播为主新型电子商务模式已经全面普及。做为文化IP打造，我们应该通过影视文化传播方式让中国消费者对中亚区域国家全面和全新的认识。

China has realized 5G network coverage, and the new e-commerce model dominated by live streaming has been fully popular. We should help Chinese consumers to gain a comprehensive and new understanding of Central Asian countries through film and cultural communication, as a cultural IP creation.

# VISION

## 五、未来发展

### **V. Future Development**

根据中国与中亚国家不同的经济发展水平，为了使双方的合作路径实现利益与合作的一体化，必须依靠区域主体的资源、文明、发展特征等形成发展的合作动力。中国作为新型崛起的大国，具有扩大经济发展空间的责任和义务，主动为中亚区域经济一体化提供更多的物资，努力构建合作共赢的“命运共同体”局面。使中亚经济发展与丝绸之路的对接在各国互相尊重的基础上，形成自然而然的融合与互动。

**As the levels of economic development are different for China and Central Asian countries, it is necessary to rely on the resources, civilization, and development features of regional subjects to form the driving force for cooperation in order to help both sides achieve the integration of interests and cooperation along the way. As a new rising power, China has the responsibility and obligation to extend its economic development space, take the initiative to provide more materials for the regional economic integration of Central Asia, and strive to build a "community of shared destiny" through win-win cooperation, so as to make the linkage between Central Asia's economic development and the Silk Road a natural integration and interaction based on mutual respect of the countries.**

从中亚国家经济发展与中国经贸合作，树立示范性国家及示范性工程及倡导合作理念及安全理念建议。中国将继续秉持奋发有为，为丝绸之路经济带的发展做出推动作用。

**In the economic development of Central Asian countries and China's economic and trade cooperation, China will build demonstrative countries and projects, and promote the concept of cooperation and security. We will continue with our vigorous efforts to contribute to the development of the Silk Road Economic Belt.**



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**Thank you for watching! We greatly  
appreciate your thoughtful  
comments.**

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