

ByteDance Ltd in Retail

August 2025

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China and Indonesia to account for the bulk of ByteDance's sales growth over 2024-2027 ByteDance is expected to retain its position as the world's fourth largest retailer to 2027

COMPETITIVE POSITIONING

E-commerce marketplaces continue to rise in global retail

ByteDance's retail operations are focused squarely on the e-commerce space

ByteDance operates three of the world's leading e-commerce marketplaces

ByteDance brands sit high in the retail rankings in China and Southeast Asia

CHINESE MARKETPLACE OPERATIONS

Douyin and Pinduoduo marketplaces are taking market share from Alibaba and JD.com

Douyin's marketplace hones its niche in health, beauty and personal care products

Douyin Marketplace fine-tunes seller policies and resources to drive domestic growth

Challenges and opportunities lie ahead for Douyin's retail ambitions in China

INTERNATIONAL MARKETPLACE OPERATIONS

ByteDance expands internationally in retail with TikTok Shop

TikTok Shop sees phenomenal success across Southeast Asia

ByteDance acquires Tokopedia after a series of regulatory challenges in Indonesia

TikTok Shop expands into Western Europe and the US

Trend virality and livestreaming drive merchants' sales on TikTok Shop

TikTok Shop's seller partnerships differentiate it and foster operational resilience

Regulatory concerns over TikTok Shop complicate its international expansion efforts

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ByteDance operates an asset-light model in retail

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