The WeChat MINI-PROGRAM

Playbook for E-Commerce

An Overview of WeChat Commerce and How Top Players in Luxury, Beauty, and Fashion are Leading the Way
# Before We Get Started, Here’s a Quick Introduction to WeChat

WeChat is China’s top messaging app with >1 billion users worldwide.

## WeChat Interface

- **Discover**
  - Moments
  - Social News Feed
  - Scan
  - Shake
  - Too Stories
  - Search
  - People Nearby
  - Message in a Bottle
  - Games

## WeChat Moments

- **Friends’ New Time Capsules**
  - User: 3 minutes ago

## Official Account

- **GUCCI**
  - Articles Published By Gucci

## Mini-Programs

- **Shop**
- **News**
- **Other Content**

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Users use WeChat for its multiple functions, such as messaging friends and sharing experiences with each other on WeChat Moments.

Brands use WeChat Official Accounts to publish content and notify followers of new promotions.

Brands are now using mini-programs to engage and sell to customers.
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PART I
An Introduction to WeChat Mini-Programs and WeChat Commerce
What are WeChat Mini-Programs?

Mini-programs are mini-apps that can be developed and accessed within WeChat.

INTRODUCTION

- WeChat is a popular platform for social commerce, with >1 billion users.
- First rolled out in January 2017, most mini-programs can be created by app developers within a matter of weeks.
- They can be accessed without users having to install or download them.
- Each page consists of two megabytes, and mini-programs can be shared easily within WeChat.
- Users are using them for booking movie tickets, ordering food delivery, hailing taxis, and many more functions.

Mini-programs have become the centerpiece of the WeChat ecosystem. It’s all about making life more convenient and efficient.

- Ashley Dudarenok, Entrepreneur, Speaker, Author
Types of WeChat Mini-Programs
E-commerce mini-programs account for the largest percentage of mini-programs on the market

**MINI-PROGRAM STATS**

- 2.3 million mini-programs online
- 230 million daily active users (DAUs) on mini-programs
- Average user opens mini-programs four times a day

**E-COMMERCE MINI-PROGRAM STATS**

- 18% of mini-programs are dedicated to e-commerce
- 5.6 billion RMB ($830 million) in funding has been raised for e-commerce mini-programs

**MINI-PROGRAMS BY TYPE (2018)**

- E-Commerce 18%
- Daily Services 17%
- Tools 15%
- Social Media 7%
- Food & Restaurants 8%
- Games 7%
- Others 28%

Source: ALDZS.com
How Users Access Mini-Programs

Most users access mini-programs through a drop-down menu, a link on the brand’s official account, and links shared by other users. There are 60+ ways to access a mini-program.

Platforms and brands will have to find a way to incentivize sharing that doesn’t make it feel too ‘spammy’
- Michael Norris, Strategy & Insights Manager at Agency China
How Users Access Mini-Programs

Most users access mini-programs through a drop-down menu, a link on the brand’s official account, and links shared by other users. There are 60+ ways to access a mini-program.
E-Commerce Mini-Program Users at a Glance

Customers on WeChat e-commerce mini-programs tend to be young and female.

E-COMMERCE MINI-PROGRAM USERS BY GENDER (2018)

- Males: 29%
- Females: 71%

E-COMMERCE MINI-PROGRAM USERS BY AGE (2018)

- ≤24 yrs old: 32%
- 25-30 yrs old: 28%
- 31-35 yrs old: 16%
- 36-40 yrs old: 13%
- ≥41 yrs old: 11%

Sources: Quest Mobile, ALDZS.com
E-Commerce Mini-Program Users at a Glance

E-commerce mini-program users spend an average of ~200 RMB (~US$30) per transaction.

Sources: Quest Mobile, ALDZS.com
Anatomy of a WeChat Mini-Program E-Commerce Store

Gucci’s flagship mini-program store highlights different clothing lines and has full e-commerce functionality.

There’s no better way to integrate online & offline retail, as well as many facets of digital China life, than through mini-programs.

- Ashley Dudarenok, Entrepreneur, Speaker, Author
Customers can Complete Closed-Loop Transactions in WeChat

Gucci’s store lets customers discover, browse, and pay for items all without leaving WeChat

1. **Discover**
   - Gucci’s store lets customers discover, browse, and pay for items all without leaving WeChat.

2. **Browse**
   - Customers can discover and browse items within WeChat mini-programs.

3. **Check Out**
   - Customers can check out their items within the WeChat mini-program.

4. **Pay**
   - Customers can pay for their items directly within the WeChat mini-program.

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WeChat mini-programs have tremendous potential in China. We recently leveraged WeChat mini-programs to provide real time ordering and online payment functionality for health supplements brand Antismog, helping the brand enter China.

- Lu Jin, Senior Sales Manager at Westwin China

Source: Gucci Official WeChat Mini-Program Store
In a market where consumers expect highly personalized, highly engaging experiences, mini programs offer brands the opportunity to innovate and experiment quickly, which is key to staying relevant.

Olivia Plotnick, China Marketing Specialist at Ogilvy
China E-Commerce Growth is Slowing
As China e-commerce growth slows, customer acquisition costs are going up. Many retail players aren’t making money on Tmall and JD.com and are looking for alternative sales channels.

**CHINA ONLINE RETAIL MOBILE TRANSACTIONS AND YOY GROWTH**

- 2013: 0.268 Trillion, 234% growth
- 2014: 0.895 Trillion, 143% growth
- 2015: 2.175 Trillion, 37% growth
- 2016: 3.412 Trillion, 2% growth
- 2017: 4.637 Trillion, 24% growth
- 2018: 5.737 Trillion, 16% growth
- 2019: 6.661 Trillion

**AVERAGE CUSTOMER ACQUISITION COSTS (RMB)**

- 2013: 7.0 RMB
- 2014: 6.0 RMB
- 2015: 5.0 RMB
- 2016: 4.0 RMB
- 2017: 3.0 RMB
- 2018: 2.0 RMB
- 2019: 1.0 RMB

Source: iMedia Research

Source: Agency China, China Merchants Securities, Company Filings
Mini-Programs Give Brands an Alternative Sales Channel to Reach Online Consumers

- **International Retailers/Brands**
  - **Standalone E-Commerce**
    - More control over branding and data, but difficult to drive traffic
  - **Marketplaces**
    - High organic traffic, but competitive, high fees, and many requirements

- **Official China Website (Desktop/Mobile)**
  - Official brand websites take time and money to maintain, and it’s difficult to drive traffic

- **Mobile Apps**
  - People don’t want to download brands’ mobile apps for low-frequency purchases

- **Mobile H5 WeChat Stores**
  - Slow to load, difficult to share amongst friends

- **WeChat Commerce**
  - Selling through WeChat, China’s most popular messaging app with >1 billion users

- **WeChat Mini-Programs**
  - Brands can set up a low-cost, accessible e-commerce mini-program store within weeks, and drive traffic by creating interactive, shareable promotions
Mini-Programs Give Brands Expanded Functions to Engage Customers

Compared to WeChat official accounts (brand pages) and mobile HTML stores, mini-programs have more advanced functions:

- **Branding**
  - Design own e-commerce store with banners, videos, etc.
- **Service**
  - Use WeChat as a customer relationship management system
  - Set up loyalty programs using users’ WeChat accounts
  - Offer customer service within WeChat
- **IT, Data**
  - Develop mini-program stores quickly on top of WeChat’s infrastructure
  - Access and analyze customer data

In many cases, mini-programs are fully functional e-commerce sites. They offer the same degree of information, content, and payment options that can be found on traditional e-commerce platforms.

- Michael Norris, Strategy & Insights Manager at Agency China
Mini-Programs are More Visual and Sharable

Compared to WeChat official accounts (brand pages) and mobile HTML stores, e-commerce mini-programs are more visual. 34% of users access them because they’re shared by friends.
Social Commerce on WeChat Facilitates User Acquisition
Brands can potentially go viral with lower acquisition costs

Social Commerce: A Definition

- Social commerce is when brands incentivize customers to market products and build brand awareness
- WeChat’s social network, sharable mini-programs, and built-in WeChat Pay features make it ideal for social commerce

Example: Pinduoduo

- Mini-program gave customers discounts to invite other customers for group-buying promotions
- Using this method, it grew to 109 million mini-program MAUs within 3 years
- Today, every e-commerce platform is promoting group-buying promotions
- WeChat’s social network, sharable mini-programs, and built-in WeChat Pay features make it ideal for social commerce

SOCIAL COMMERCE LOWERS ACQUISITION COSTS*

Sources: Agency China, China Merchants Securities, Company Filings, Quest Mobile

WeChat mini-programs are key to enabling and developing social commerce. Without mini-programs, it is difficult to enable closed-loop social commerce transactions.

- Ivy Shen, VP of International Business at Azoya
Social Commerce Growth Will Outpace Normal E-Commerce

Social commerce will grow at 35.5% CAGR through 2022, compared to 18.8% for normal e-commerce.

We're seeing all kinds of new social ecommerce models spring up in China, models made possible by mini programs and the opening up of WeChat traffic.

Matthew Brennan, Managing Director of Chat Channel
# A SUMMARY OF WECHAT E-COMMERCE MINI-PROGRAMS

<table>
<thead>
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<th>Definition</th>
<th>Mini-programs are mini-apps built within the WeChat ecosystem</th>
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<tr>
<td>Benefits for Consumers</td>
<td>Mini-programs are convenient to use</td>
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<tr>
<td></td>
<td>• Each page consists of 2 MB and loads quickly</td>
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<td></td>
<td>• They can be accessed through 60+ different ways within WeChat</td>
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<td></td>
<td>• They can be shared with friends with just a few taps</td>
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<td></td>
<td>• Transactions can be completed seamlessly with WeChat Pay</td>
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<td>Benefits for Brands</td>
<td>Mini-programs’ expanded functions enable brands to better engage customers</td>
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<td></td>
<td>• Brands can design their own store with visual banners, videos, mini-games, etc.</td>
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<td>• Brands can use WeChat and users’ WeChat accounts as a customer management system</td>
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<td>• Brands can set up loyalty systems</td>
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<td>• Brands can offer customer service</td>
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<td>• Brands can develop mini-programs within weeks, at a fraction of the cost of a mobile app or website</td>
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<td>• Brands have full access to their customer data, which they can analyze for future use</td>
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<td>Why Mini-Programs Went Viral</td>
<td>Mini-programs are convenient, accessible, and appealing for lower-frequency services such as e-commerce where users don’t want to download a separate app</td>
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<td>An Alternative for China E-Commerce</td>
<td>Mini-programs provide brands with more control over their e-commerce store design and data, and give them the power to drive traffic through WeChat and its social network</td>
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For British brands entering China for the first time, mini-programs allow the opportunity to test the market without large upfront costs; for those who are already in China, mini-programs provide an additional avenue to reach and engage new customers.

Ben Goodwin, Head of Consumer Retail, China at UK Department for International Trade
Creative Types of E-Commerce Mini-Programs

Brands are creating interactive, visual mini-programs to better engage customers and encourage them to share with friends.

- **User Generated Content**: Brands can incentivize customers to create content, increasing conversions and engagement.
- **Social Gifting**: Customers can purchase virtual gift cards or gifts and share them with friends on WeChat.
- **Personalization**: Customers can customize their own products, adding their own personal touch and sharing with friends.
- **Key Opinion Leader Selling**: Influencers/KOLs have their own mini-program stores to promote brands and co-branded products.
- **Online-Offline Activation**: Brands can use mini-programs to convert offline traffic to online or provide offline services for online customers.
- **Group-Buying Campaigns**: Customers can pull in friends/family to purchase goods in bulk in exchange for a discount.
- **Content Acceleration**: Mini-programs are designed to convert traffic from official accounts directly into e-commerce sales.
- **Customer Service**: Mini-programs can provide smart customer service with a more visual and attractive interface.
Brands are Using WeChat to Generate a Community of Loyal Fans and Content
YSL Members Club – Content Creator Journey

This interactive mini-program incentivizes users to post content and tag products, similar to Little Red Book and Pinterest.

1. Write Content, Add Pics
2. Tag Products
3. Confirm

- Content creators earn rewards points that can be redeemed for discounts:
  - +5 points for tagging YSL on social media
  - +100 points for posting content on products
  - +200 points if other users make a purchase by clicking on your tags
- Scoreboard ranks content posts with most “likes”, encouraging people to share with friends
- Each member can tag makeup items that redirect users to e-commerce store

Source: Y Fans Official WeChat Mini-Program Store
YSL Members Club – Customer Journey
Content & Pinterest-like tags encourage users to make purchases and share their experiences

1. Open Mini-Program
2. Browse, Click Tags to Buy
3. Pick Color, Buy with WeChat Pay
4. Share Experiences

Source: Y Fans Beauty Official WeChat Mini-Program Store
E-commerce is increasingly driven by content, because content helps build trust with and educate customers.

Mini-program provides two-function store in which customers can create content and make purchases.

**Brand Pain Points**
- Hard to get users to post content & reviews
- Hard to gain customer trust without content
- Hard for content to directly drive sales

**Mini-Program Solutions**
- Contest incentivizes users to create content
- KOLs also promote their own content to drive buzz
- Content drives traffic, creates community of engaged customers
- Product tags help YSL monetize and drive sales
Dior Gift Cards
Beauty & Cosmetics

CORE FUNCTIONS

- Virtual gift card mini-app equipped with WeChat Pay
- Users can purchase virtual gift cards for friends, who can redeem them for different products
- Gift cards and underlying products can be customized for different themes, holidays
- Gift cards can be easily shared on WeChat

Source: Dior Gift Card Official WeChat Mini-Program Store
Dior Gift Cards – Customer Journey

Beauty & Cosmetics

1. **Click on WeChat Moments Ad**
2. **Load Mini-Program, Pick Gift Card**
3. **Purchase Gift Card**
4. **Share with Friends**

**WeChat Moments**

**Front Page**

**Product Purchase Page**

**Chat Window**

Source: Dior Gift Card Official WeChat Mini-Program Store
Dior Gift Cards - Analysis

Beauty & Cosmetics

Brand Pain Points

- Offline gifts have to be picked out, wrapped
- Gift cards easy to lose, need to redeem in person
- Hard to track consumption data
- Online gift cards require clunky e-mail registration + long codes
- Difficult to target right customers

Mini-Program Solutions

- Everything can be done online
- Recipient can share on WeChat Moments to show off
- Merchants can designate certain products for deals
- Mini-programs more visible, load quicker, and users can log in with WeChat accounts
- Moments ads can use Tencent data to target right customers and direct users to purchases

Gift-giving is a major tradition for different holidays and occasions in China, but giving physical gifts is a hassle.

WeChat allows customers to buy, send, and share gift cards in one end-to-end process.
BRANDS ARE USING WECHAT TO GIVE EVERY CUSTOMER A PERSONALIZED SHOPPING EXPERIENCE

Used wisely, mini-programs can be the one-stop shop to the latest editorial campaign coverage, real-time customer service, speedy checkout, live streaming a runway show, and so much more—all at the fingertips with one click away.

Ruonan Zheng, Content Manager at Jing Daily
Longchamp's mini-program allows customers to customize their handbags. Customers can change the color of the exterior and interior, as well as add decorative symbols. Designs can be shared with friends on WeChat and purchased with WeChat Pay.
Longchamp – Customer Journey
Luxury Goods

1. Select Product
2. Customize
3. Confirm & Pay
4. Share

Source: Longchamp Official WeChat Mini-Program Store
YSL BEAUTY
Beauty & Cosmetics

CORE FUNCTIONS

• YSL’s mini-program sends a personalized Valentine’s Day gift set to loved ones

• Customers can personalize gift sets and choose from different price points

• Gift sets can be shared with friends on WeChat

• Customers can complete closed-loop transactions with WeChat Pay

Source: YSL Beauty Official WeChat Mini-Program Store
YSL Beauty – Customer Journey
Beauty & Cosmetics

1. Click on WeChat Moments Ad
2. Read Instructions
3. Select Gift Set
4. Confirm & Pay

Source: YSL Beauty Official WeChat Mini-Program Store
Longchamp, YSL Beauty - Analysis
Luxury Goods

Brand Pain Points

- Luxury brands often struggle to replicate luxury experience online
- No shop attendants to provide VIP service
- E-commerce often associated with discounting & fakes
- Hard to measure ROI of WeChat Moments ads

Mini-Program Solutions

- Personalizing ads and offering personalization services makes customers feel special
- Personalized products can be shared on WeChat to show off to friends/family
- Official mini-program store perceived as more authentic
- Linking Moments ads to mini-program helps convert customers

Personalization mini-programs engage customers by letting them customize and gift their own luxury products

YSL RESULTS

- The click rate of this WeChat ad was 280% higher than the industry average
- User comment rate 8x industry average
- Two most expensive gift sets sold out within half a day

Luxury Goods
ONLINE-OFFLINE ACTIVATION

WeChat’s Enhanced Mini-Program Functions Bridge the Gap Between Online and Offline
DFS Group Hong Kong
Travel Retail

DFS’s mini-program is designed to facilitate online activation of travel retail customers. Chinese tourists visiting Hong Kong can order their products online, and pick them up in offline DFS stores at the airport or downtown. In Hong Kong, you can choose from three stores to pick them up from.

Source: DFS Official WeChat Mini-Program Store

I am also very optimistic about the “online-offline activation” type of mini-program. Mps don’t need to be downloaded, which helps offline buyers access products and services online more easily.

- Quinten Kemp, Managing Director at Nextport China
DFS Group Hong Kong – Customer Journey
Travel Retail

1. Click on WeChat Moments Ad
2. Select & Order Product
3. Choose Location for Pick-Up
4. Confirm Details, Pay
5. Pick Up Offline

Source: DFS Official WeChat Mini-Program Store
DFS Group Hong Kong - Analysis
Travel Retail

**Brand Pain Points**

- Hard to educate customers within limited time frame
- Travel retail stores crowded with long lines and limited inventory
- Currency exchange a hassle
- Difficult to maintain membership/loyalty system for traveling tourists

**Mini-Program Solutions**

- WeChat ads recommend products before customers arrive
- Customers browse inventory online, pick-up offline
- Online RMB transactions converted to local currencies and remitted to merchant
- Integrated offline/online membership system with user WeChat accounts

WeChat turns fragmented, rushed travel retail shopping into a seamless omnichannel experience with online shopping, payments, and loyalty programs.
Mini-Programs Help Influencers Convert Content into Sales

We predict that KOL selling and promotion of brands' mini-programs will continue to gain adoption and will be one of the most attractive options, especially for cross-border e-commerce.

Kim Leitzes, CEO & Founder of PARKLU
Gogoboi is a popular KOL with many fans following his WeChat official account. Content drives traffic to a mini-program, which gives recommendations based on different styles, seasons, type of clothing, etc. Each post is tagged with items that direct users to different WeChat shops.
Gogoboi – Customer Journey
Content and product tags link directly to e-commerce items, with WeChat Pay enabling a closed loop transaction

1. Click on Official Account Link
2. Click on Promotion
3. Click on Product Tags
4. Research Product
5. Confirm, Pay

Source: Gogoboi WeChat Mini-Program Store
Mini-programs enable a seamless process that helps KOLs educate customers and sell products in a closed-loop transaction process.

**Brand Pain Points**

- Hard to drive traffic to e-commerce shops
- Customers overwhelmed by number of product choices on the market
- Customers must jump from KOL content to third party site to make purchases

**Mini-Program Solutions**

- KOL uses content, followers to drive traffic and sales
- KOL recommendations narrow down choices
- Mini-program facilitates jump from content to e-commerce without leaving WeChat

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For beauty and consumer lifestyle brands, we have tracked upwards of a 65% correlation between KOL mentions of a brand and its e-commerce sales.

- Kim Leitzes, CEO & Founder of PARKLU
GROUP-BUYING

Mini-Programs’ Social Sharing Functions
Decentralize Customer Acquisition and Lower Marketing Costs
Feelunique
Beauty & Cosmetics

Group buying is the most effective type of mini-program because it exploits the advantages of WeChat’s ecosystem - the strong social sharing habits - to scale user growth.

- Quinten Kemp, Managing Director at Nextport China

CORE FUNCTIONS

- This six-day campaign encourages customers to pull in friends for a group-buying promotion
- Group-buying prices for a Caudalie set are 552 RMB as opposed to 878 RMB for the full price
- Campaign can be shared with friends on WeChat; goods are shipped after friends buy
- This lowers user acquisition costs and improves customer engagement
Feelunique - CUSTOMER JOURNEY

Group-buying goods are only shipped after you share item with friends and they decide to buy.
Feelunique - Analysis
Beauty & Cosmetics

Customers can complete group-buying transactions in mini-program without leaving WeChat. Group-buying subsidizes customer acquisition so merchants don’t have to spend on ads.

**RESULTS**
- Six-day campaign pulled in 38 group-buying pairs
- Over 90% of participants were new customers

**Brand Pain Points**
- Online customer acquisition is expensive
- Hard for brands to gain customer trust
- Group-buying through e-mail (Groupon) doesn't work, too fragmented

**Mini-Program Solutions**
- Group-buying offers slight discounts for customers who can pull in new customers
- Group-buying = buying with friends (social confirmation, trust)
- WeChat enables customers to share and pay for products in one closed loop transaction
CONTENT ACCELERATION

Embedded Mini-Program Buy Buttons Help Monetize Content and Drive Sales
Sephora
Beauty & Cosmetics

**CORE FUNCTIONS**

- Sephora focuses on content to highlight new special edition collections
- Official account content contains multiple links to different mini-program items for purchase
- This directly monetizes official account traffic

Source: Sephora Official WeChat Mini-Program Store
Sephora – Customer Journey

Official account content + mini-program store are interlinked in one closed loop transaction

1. Browse Content
2. Jump to Mini-Program
3. Add to Cart
4. Pick Size, Color
5. Confirm, Pay

Source: Sephora Official WeChat Mini-Program Store
Sephora - Analysis
Beauty & Cosmetics

Sephora’s mini-program enables a closed-loop transaction that takes users directly from content to purchases.

**Pain Points**
- Offline stores too crowded, customers don’t know what to buy and feel rushed
- Hard to integrate offline-online membership system
- Hard to convert Official Account content to sales

**Solutions**
- QR codes in physical stores link directly to WeChat official accounts and mini-programs
- WeChat mini-program can be linked to user WeChat account
- Direct links direct users to purchases, shortening customer journey
CUSTOMER SERVICE

Smart Mini-Program Chatbot Features Enhance the Customer Experience
MaybellineNOW – Smart Customer Service

Beauty & Cosmetics

CORE FUNCTIONS

- Smart customer service recommends products and handles customer questions
- Interface is easy to use and can be slid up and down
- Customers are quickly directed to a list of recommended products
- Each product is linked to a separate mini-program store in which purchases can be made

Source: MaybellineNOW Official WeChat Mini-Program Store
MaybellineNOW – Customer Journey

Customer service bot answers questions and links directly to e-commerce product pages

1. Load Mini-Program

2. Click on Suggested Questions

3. Pick Recommended Products

4. Confirm, Pay

Source: MaybellineNOW Official WeChat Mini-Program Store
MaybellineNOW - Analysis
Beauty & Cosmetics

Brand Pain Points

Customers often have to wait in line for customer service

Customer service centers often deluged with same questions

Customers often don’t know what to buy

Mini-Program Solutions

Auto-respond feature provides quick solution

AI-powered customer service can use data to identify commonly used questions

AI-powered bots use past data to recommend suitable items
### SUMMARY

#### New Sales Channel
WeChat mini-programs give brands a new creative channel to engage and sell to Chinese consumers.

#### Social Sharing Features Lower Customer Acquisition Costs
The simple interface and social sharing feature of mini-programs allow customers to share their experiences with friends, lowering customer acquisition costs.

#### Seamless Customer Experience
Customers can play games, send gifts, personalize products and pay with WeChat Pay all without leaving WeChat.

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One of the key value propositions of mini-programs is lowering the barriers of cost and time to develop new ideas, becoming a vehicle for creativity and experimentation.

- Matthew Brennan, Managing Director of Chat Channel
Thanks!

Azoya Consulting is a subsidiary of Azoya International, which empowers international retailers with clear and actionable China e-commerce strategy powered by data, research, expertise and business intelligence.

Azoya Group is a global e-tailing group that is dedicated to helping international brands and retailers enter the China e-commerce market.

Our WeChat Mini-Program Store Solution enables smaller brands to set up and operate their own cross-border WeChat stores.