

Indonesia Channel Reality Check

What selling on Shopee, Tokopedia and TikTok Shop actually costs a brand — and the gross margin you need before entering.

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Most market-entry research for Indonesia is written by people who have never had a seller dashboard open. It reports the platform commission from a published rate card — typically a reassuring single digit — and stops there. Brands then build their entry case on a cost that bears little relationship to what they will actually pay.

The published commission is not the cost of selling in Indonesia. It is roughly a quarter of it. The rest sits in mechanisms that never appear on a rate card: mandatory shipping-subsidy programmes you must join to be visible, affiliate commissions you set yourself but cannot realistically set to zero, platform campaign discounts you co-fund, and the advertising spend without which listings do not surface at all.

This document sets out the real stack, with a worked example, and states the gross margin threshold a brand needs to clear before Indonesian marketplace entry makes financial sense. The figures are current as of September 2026 and are indicative rather than contractual — rates are category- and tier-specific, and 2026 has been an unusually volatile year for them.

THE SHORT VERSION

1. **Published commissions run roughly 7–10%.** Total channel cost to actually sell a unit runs closer to **40%** of gross merchandise value once shipping programmes, affiliate payouts, co-funded vouchers and advertising are included.
2. **A brand needs about 42% gross margin simply to break even** on marketplace channels at realistic support levels, and roughly **52%** to net 10%. Imported goods carrying duty and landed freight frequently do not clear this.

3. Premium and high-ticket products were repriced overnight in May 2026.

TikTok Shop raised its dynamic commission cap from Rp40,000 to Rp650,000 per item — a sixteenfold increase that falls almost entirely on higher-priced goods.

4. Channel choice is a function of ticket size, not brand preference.

The cheapest channel for a Rp150,000 item is not the cheapest for a Rp3,000,000 item, and the gap is now large enough to decide which SKUs are viable at all.

What the rate cards say

These are the headline figures a brand will find when it researches Indonesian marketplaces. They are accurate, and they are also the smallest component of the real cost.

CHANNEL	PLATFORM COMMISSION	OTHER STATED FEES	STATED ALL-IN
Shopee	2.5–10% by category and seller tier (Non-Star, Star, Star+, Mall)	Order processing Rp1,250; Free Shipping XTRA 4–4.5%; pre-order 3% plus 2% service	~10–15%
Tokopedia	6.97% general, tax inclusive; 10% subcategories discounted to 8% effective	Order processing Rp1,250 per delivered order; pre-order 3%	~8–10%
TikTok Shop	6.97–10% by category, plus dynamic commission capped at Rp650,000 per item	Order handling Rp1,250, charged even on returns; pre-order 3%; seller-set affiliate 5–20%	~12–16%

Rates as published September 2026. Tokopedia and TikTok Shop operate a shared commission structure with savings programmes (GMV Max, Growth Xtra) that can reduce effective rates materially for sellers meeting ad-spend conditions. Category-level rates vary widely; confirm per SKU before committing to a price.

What the rate cards leave out

Every item below is a real, recurring cost of selling. None of them appear in the commission figure a brand will quote in its board paper.

Advertising is not optional

Organic reach on all three platforms is effectively zero for a new seller with no review history. Visibility is bought. Consumer categories typically run 10–20% of GMV in platform ad spend, and a new entrant sits at the top of that range while it builds ratings.

Shipping subsidy programmes are a condition of visibility

Free-shipping programmes are nominally optional. In practice, listings outside them lose the filter that a large share of buyers apply by default, so the 4–4.5% is better modelled as a fixed cost of doing business than as a discretionary promotion.

Campaign participation is co-funded

Double-date campaigns (9.9, 10.10, 11.11, 12.12) drive a disproportionate share of annual volume. Participation requires the seller to fund vouchers and discounts. Sitting the campaigns out means forfeiting the months that carry the year.

Affiliate commission is nominally seller-set

On TikTok Shop the seller chooses the affiliate rate, between 5% and 20%. Setting it low is permitted and is also how a product goes unpromoted, because creators select what they promote on expected earnings.

Returns still cost money

TikTok Shop's order handling fee is charged on returned orders. Return rates in fashion and footwear categories are material, and the fee survives the reversal.

Worked example: a Rp500,000 product

A consumer product listed at Rp500,000 on TikTok Shop, supported at levels a new entrant would realistically need in order to generate volume. Assumptions are stated so they can be changed.

LINE	RUPIAH	% OF PRICE
Listed price	500,000	100.0%
Platform commission, 8%	(40,000)	(8.0%)
Dynamic commission, 4%	(20,000)	(4.0%)
Order handling	(1,250)	(0.3%)
Affiliate commission, 10%	(50,000)	(10.0%)
Co-funded campaign voucher, 5%	(25,000)	(5.0%)
Advertising to generate the sale, 15%	(75,000)	(15.0%)
Lands in the seller's account	288,750	57.8%

Total channel cost: 42% of GMV. This is before cost of goods, import duty, inbound freight, local warehousing, fulfilment labour, payment settlement timing and returns. A leaner configuration — Tokopedia, no affiliate programme, disciplined advertising at 8% — lands closer to 84% of price, or 16% channel cost. The spread between those two configurations is the single largest variable in an Indonesian entry model, and it is a strategic choice rather than a market constant.

The gross margin you need before you start

Working backwards from a 42% channel cost, the threshold is unforgiving:

TARGET NET MARGIN ON LISTED PRICE	GROSS MARGIN REQUIRED	MAXIMUM COGS
Break even	42%	58% of price
Net 5%	47%	53% of price
Net 10%	52%	48% of price
Net 15%	57%	43% of price

This is where most entry cases fail. A brand landing goods in Indonesia at 60% of its intended retail price — entirely normal once duty, freight and local margin stacking are applied — is structurally loss-making on marketplace channels at realistic support levels, no matter how well the brand is executed. The decision that

follows is not a marketing decision. It is a pricing and landed-cost decision, and it has to be made before launch rather than diagnosed after two quarters of losses.

The change of May 2026 that most entry models have not caught

On 18 May 2026 TikTok Shop restructured its dynamic commission. The headline rate rose from 5.5% to 8% in affected categories, which is noticeable. The consequential change was the per-item cap, which rose from Rp40,000 to Rp650,000 — sixteenfold. Because the old cap bound at around Rp727,000 of item price, the entire burden of the change falls on higher-priced goods.

ITEM PRICE	BEFORE 18 MAY	AFTER 18 MAY	INCREASE
Rp300,000	16,500	24,000	+2.5 pp of price
Rp1,000,000	40,000	80,000	+4.0 pp of price
Rp3,000,000	40,000	240,000	+6.7 pp of price
Rp8,000,000	40,000	640,000	+7.5 pp of price

Illustrative, using a category moving from 5.5% to 8.0%. Actual rates are category-specific. The change drew public objection from Indonesian sellers and a statement from the Ministry of Co-operatives and SMEs opposing unilateral fee increases, so the regime should be treated as contested rather than settled — which is itself a planning assumption worth stating in any entry model.

What this means if you are looking at Indonesia

Model the channel, not the commission

An entry case built on a 7% platform fee is wrong by a factor of five or six. Build the full stack, and build it per SKU, because the answer changes with ticket size.

Decide channel by price point

Low-ticket, high-velocity products can absorb TikTok Shop's structure because the cap rarely binds and affiliate-driven discovery works in their favour. Premium products

increasingly cannot, and after May 2026 the arithmetic favours moving them toward Tokopedia or a direct-to-consumer route with paid acquisition priced deliberately.

Fix landed cost before fixing the brand

If gross margin does not clear roughly 45–50% at Indonesian retail price, no amount of brand work rescues the unit economics. That conversation belongs with sourcing and pricing, at the start.

Treat the rate regime as a variable

2026 has produced repeated mid-year changes and active regulatory pushback. Any model with more than a twelve-month horizon should carry a sensitivity on platform take rate, not a fixed assumption.

Method and sources. Fee structures compiled September 2026 from Shopee Seller Centre, Tokopedia Seller Centre and published Indonesian seller-market reporting, cross-checked against operating experience running official marketplace stores for a multinational consumer brand across five Indonesian marketplaces and Singapore. Worked examples use stated assumptions and are illustrative, not quotations. Category- and tier-specific rates must be confirmed against current platform documentation before they are relied on commercially.

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