

State of Cross Border

Consumer Insights



Apparel & Fashion

Overview

If you're a merchant or 3PL navigating global growth, this report is your playbook for what's happening now in cross-border commerce. We analyzed cross border shipments of \$100M+ in GMV to surface key trends

Key Findings and Recommendations

- Apparel shows in key markets across the world, though measuring product resonance is necessary for success.
- Hit by conversion decreases in Q1 due to tariff activity, apparel benefits from Localized Market Pricing to offset landed cost increases
- Strong seasonality of apparel in peak season encourages targeted campaigns at the end of the year.

- **YoY increase over 2024**



+64%

Q1 to Peak

-3%

YoY growth

Apparel & Fashion

Apparel & Fashion experienced a 64% increase from Q1 to peak, indicating strong seasonality. However, a YoY decline of -3% points to potential saturation or increased competition in global markets, with shoppers possibly shifting toward more niche or domestic brands.

Top 3 categories by region in 2024



While apparel shows up consistently across all markets, its prominence varies—suggesting that while fashion is global, the mix of pricing strategy, and delivery experience still need to be finely tuned per region. Merchants looking to expand should prioritize regionally aligned product strategies after measuring consumer data to see what products are resonating in which markets.

Industry Highlights

Conversion rate decreases in Q1 2025



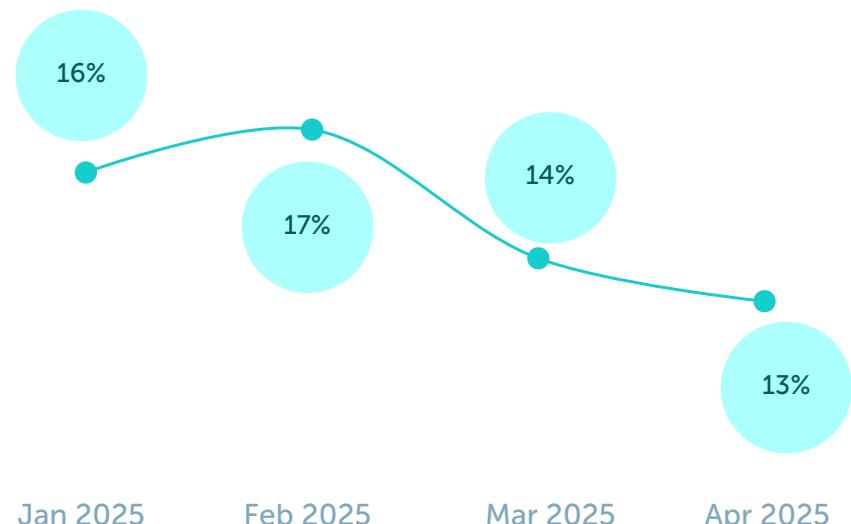
13 %
Jan 2025
8 %
Mar 2025

Apparel & Fashion

Apparel & Fashion, once a high-performing vertical, Apparel & Fashion saw conversion rates fall from 13% in January to just 8% by March 2025. As a price-sensitive category with a high volume of low-to-mid value shipments, apparel is particularly exposed to the added cost burden of duties and taxes as well as manufacturing in China.

Compared to all verticals

To maintain conversion rates amid rising landed costs, merchants must rethink how prices are presented. Localized market pricing, a strategy where product prices are adjusted per country and displayed with duties, taxes, and fees already included—can help offset the impact of new tariffs.



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- 9% increase in conversion QoQ
- 16% growth in QoQ
- 10% growth in AOV in the last quarter

Based on 100M+ GMV shipments • Used by 500+ ecommerce brands • Backed by real carrier and customs data

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