



Industry Benchmarks

Cross Border BFCM

Unpacked

2025

BFCM 2025 happened during one of the most disruptive trade years in recent memory.

Revenue & Sales



YoY Growth

↑ **+27%**

In international revenue despite headwinds

YoY Growth

↑ **+8%**

In international sales volume

Revenue YoY% by verticals

Apparel & Fashion



↑ **+111%**

Household Goods



↓ **-32%**

Beauty & Cosmetics



↑ **+13%**

Health & Wellness



↑ **+124%**

Top 5 markets based on YoY% Revenue this BFCM

Canada (CA)



+0.3%
YoY growth

United Kingdom (GB)



+54%
YoY growth

Australia (AU)



-3%
YoY growth

Germany (DE)



+52%
YoY growth

United Arab Emirates (AE)



+226%
YoY growth

Purchases driven by value and predictability, not just discounts.

Average Order Volume increase over BFCM

Comparing AOV over BFCM 2025 compared to the rest of the year (January – October)

2025 AOV (Jan – Oct)


\$114.26

2025 BFCM AOV

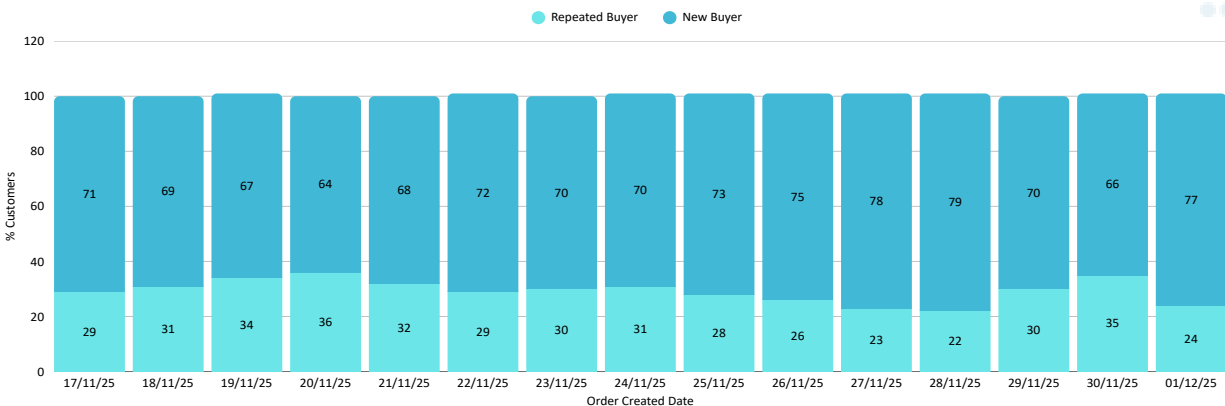

\$136.36

20% Growth

Marketing Vertical	2025 AOV (Jan – Oct)	2025 AOV	Growth %
Apparel & Fashion	\$129.67	\$159.53	23%
Household Goods	\$113.72	\$119.39	5%
Beauty, Cosmetics & Fragrance	\$132.20	\$151.26	14%
Health & Wellness	\$165.19	\$160.67	-3% (Flat)

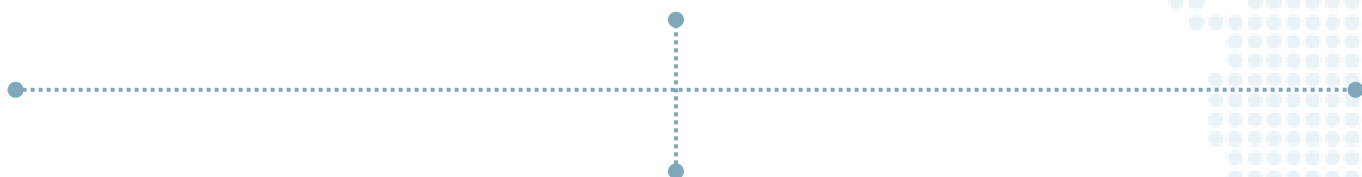
BFCM gave you the audience, global confidence will keep it.

Nearly 1 of 3 orders are first-time buyers. Think about your post-BFCM strategies to drive repeat buyers.



BFCM 2025 shows a new cross border landscape is **forming**

- ✓ **Global demand remains strong, but distribution has shifted.** Markets like the UAE and Germany are becoming new growth engines.
- ✓ **Vertical resilience correlates with consumer need-state.** Health, wellness, and apparel weathered tariff shocks far better than home goods..
- ✓ **AOV increases show consumers are optimizing for total landed value.** Clear duties, shipping predictability, and trust in cross border workflows matter more than ever.



Merchants who succeed cross border in 2025 did this

Double down on high-performing markets

Reallocate spend and fulfillment focus toward markets showing strong YoY lifts (e.g., UK, DE, AE) to maximize emerging momentum.

Prioritize verticals with resilient demand

Lean into categories demonstrating outsized growth—Apparel, Health & Wellness—and refine pricing, inventory, and routing to capture elevated AOV behavior.

Optimize for transparency in duties and delivery

Tariff volatility made predictability a key conversion lever. Clear landed costs and reliable delivery experiences will continue to drive higher-value baskets.

Strengthen retention strategies

Repeat buyers anchored BFCM performance. Loyalty incentives, localized post-purchase experiences, and proactive communication can compound this advantage.

Prepare now for regulatory shifts

Upcoming de-minimis and customs rule changes will reshape cross border flows. Build compliance processes, data hygiene, and automation ahead of enforcement.

