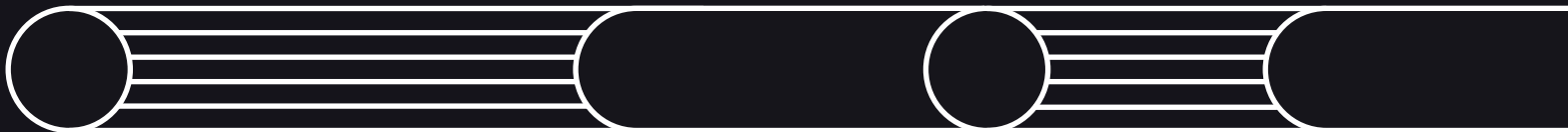
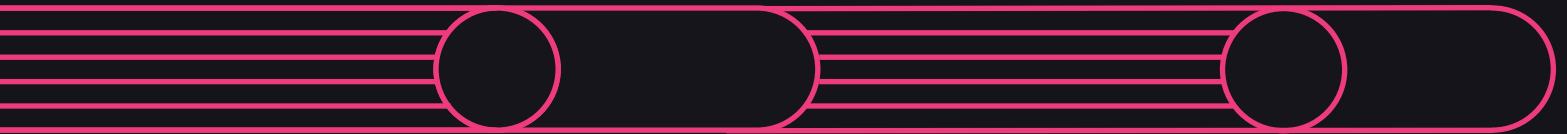


A Shopify Plus publication



The Global Ecommerce Playbook

Map, launch, and scale internationally.



Last modified

07/2021

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You can read this playbook from start to finish, or go straight to your stage of international expansion.

The Global Ecommerce Playbook

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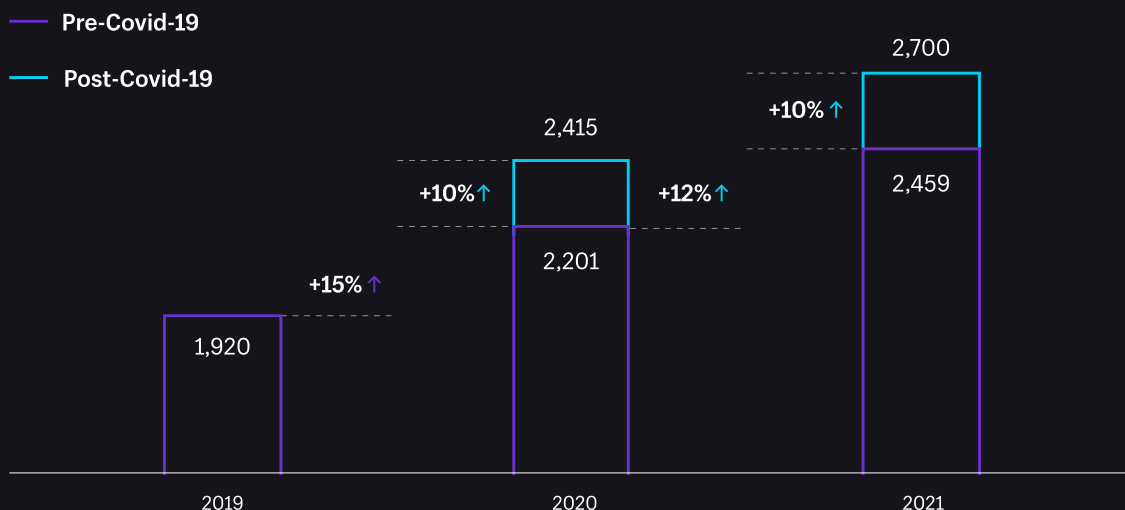
Going global in a pandemic world

Going global was complex enough, then 2020 hit. Brexit. COVID-19. International and political tensions. Financial predictions during the pandemic were so dismal, some wondered whether the pandemic could be the end of globalization.

But if you sold products online in 2020, you know that brick-and-mortar closures during the pandemic caused the ecommerce market boom, and rapidly: More than 2 billion people bought something online in 2020. Global ecommerce sales increased 12.5% between 2018 and 2019. And between 2019 and 2020, that increase more than doubled. The global ecommerce market is nearing \$5 trillion in 2021, and the concentration of that market is moving from the West to the East.

Global ecommerce revenues will see an additional growth of 10% in 2020 due to COVID-19

Coronavirus impact: Ecommerce forecast
Global ecommerce revenue forecast in billion US\$

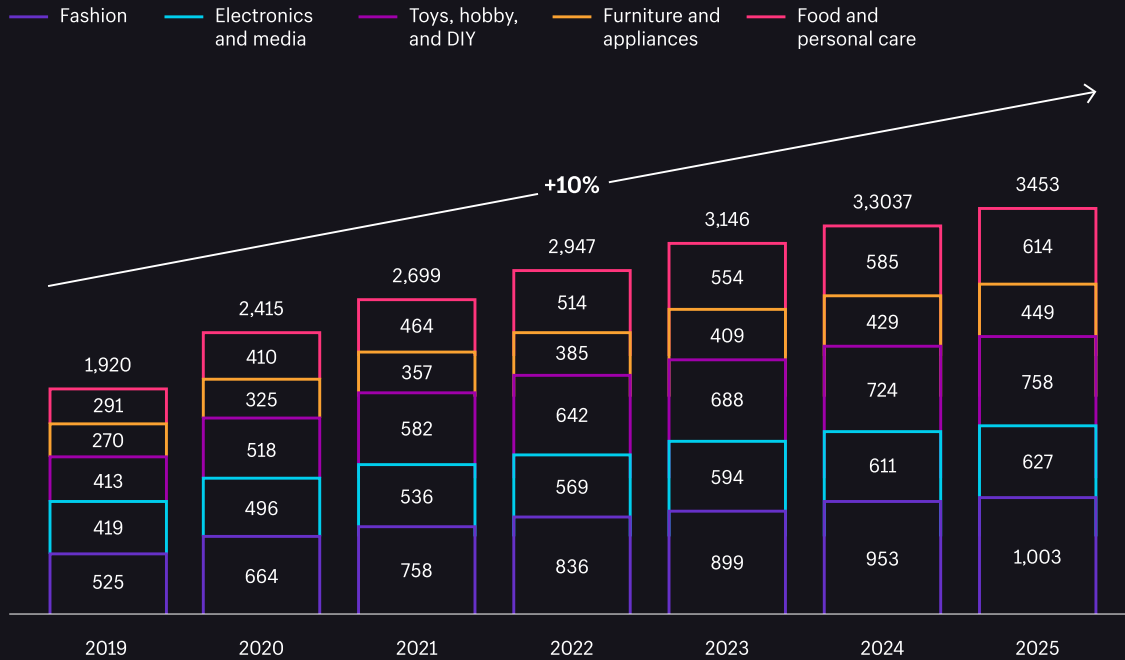


1: COVID-19 impact on ecommerce revenue is constantly followed and will be updated regularly; thus, forecast subject to change
Source: Statista Digital Market Outlook as of November 2020

Global ecommerce revenue is expected to grow to US \$3,453.3 billion by 2024

Estimated market development

Global ecommerce revenue forecast in billions US\$



Going global in a pandemic world

1: CAGR: Compound Annual Growth Rate / average growth rate per year
 Note: Revenue figures refer to Gross Merchandise Value (GMV); Forecast adjusted for expected impact of COVID-19, November 2020
 Source: Statista Digital Market Outlook 2020

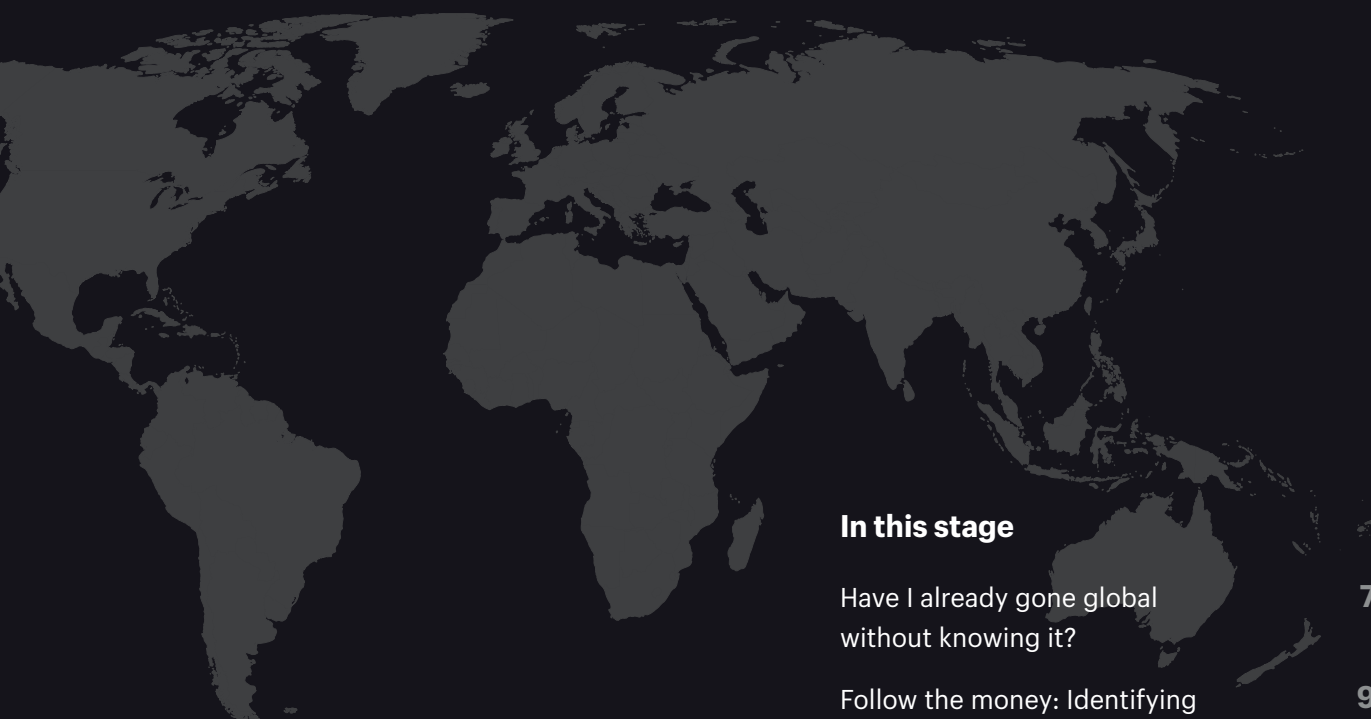
There's never been a better time to go global.

The [UN predicts](#) the trend toward ecommerce will continue even after the pandemic, but there's no denying the challenges. Some of the world's largest multinationals have [failed](#) when expanding abroad.

With this playbook, we hope to watch you succeed where others have failed. Whether you're considering international expansion or looking to scale your established international operations faster, The Global Ecommerce Playbook will guide you through the complexities of international ecommerce so you can build your business across borders with efficiency and confidence.

Stage 1

Map your global expansion



Map your global expansion

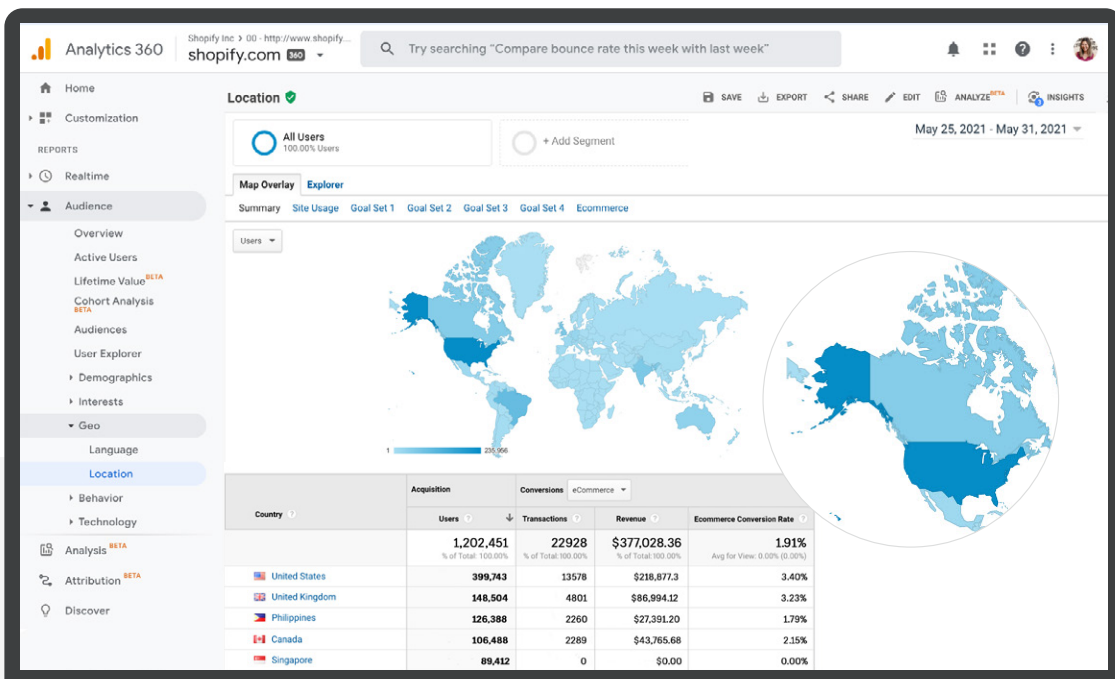
In this stage

- Have I already gone global without knowing it? **7**
- Follow the money: Identifying new market potential **9**
- Understanding the local market, brand fit, and potential ROI **12**
- How to test new regions quickly, easily, and nearly risk free **14**

Have I already gone global without knowing it?



You might not have targeted cross-border consumers yet, but interest in the goods and services you offer could already be there. Pinpoint that interest by analyzing current traffic and sales-by-country data in your analytics dashboards:

- **Google Analytics:** View your locations report (Audience > Geo > Location) for in-depth information about the location of your visitors. Set up [segments](#) to break down international traffic by continent, country, region, or city, and to understand customer behavior.
- **Ecommerce platform:** If your ecommerce platform offers robust reporting, create dashboards that show sessions by country, customers by country, and sales by billing country.



Map your global expansion

Use these side-by-side comparisons to inform your decision to expand. Insights like these will emerge:

	IF you discover European customers bounce on your checkout page
	THEN you might not be offering checkout in local currencies, showing prices that include duties, or including the proper address fields
	IF you discover Chinese visitors bounce on your returns page
	THEN your returns policy might not support international purchases or might lack transparency and detail

When you have significant traffic from a particular country but aren't converting visitors at the same rate as in your home country, create a [localized online store](#) and checkout complete with local currency, local payment methods, language support, and global shipping options to boost sales.

Why aren't they buying? Exit-intent surveys

If the quantitative data above tells you international consumers are crossing digital borders to visit your site but aren't making a purchase, find out why through qualitative data. Pop-up exit-intent surveys are the best way to gather this information, and you can set up triggers so that it only appears for visitors outside your home country. Make it easy by providing visitors with common objections:

We're sorry to see you go! How can we do better?

- Delivery costs and shipping time
- Unkown customs or duties
- International return processes
- Other reason

Turn your data into action. For example, if shipping time is a common response, consider holding inventory closer to international consumers.

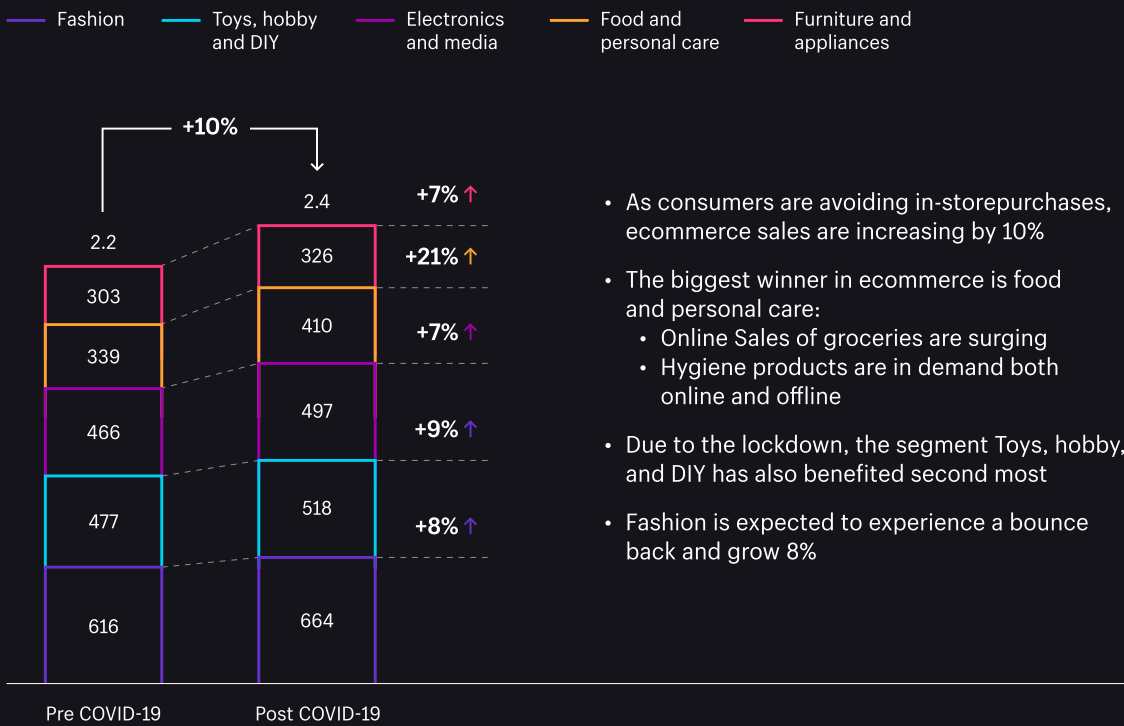
Follow the money: Identifying new market potential

Before expanding internationally, consider your industry's ecommerce sales, each country's ecommerce revenue forecast, and how digitally mature each region is.

All ecommerce segments are expected to experience gains due to the pandemic

Coronavirus impact: Ecommerce forecast

Worldwide ecommerce revenue forecast 2020 in billions US\$



- As consumers are avoiding in-store purchases, ecommerce sales are increasing by 10%
- The biggest winner in ecommerce is food and personal care:
 - Online Sales of groceries are surging
 - Hygiene products are in demand both online and offline
- Due to the lockdown, the segment Toys, hobby, and DIY has also benefited second most
- Fashion is expected to experience a bounce back and grow 8%

Map your global expansion

1: COVID-19 impact on ecommerce revenue is constantly followed and will be updated regularly; thus, forecast subject to change
 Source: Statista Digital Market Outlook as of November 2020

The data shows that ecommerce sales are continuing to increase across all segments. COVID-19 has changed not only the medium consumers use to shop, but also what they're buying. Fashion is still the industry leader, but the DIY trend and the popularity of food delivery is showing up in the numbers. Here are the key takeaways:

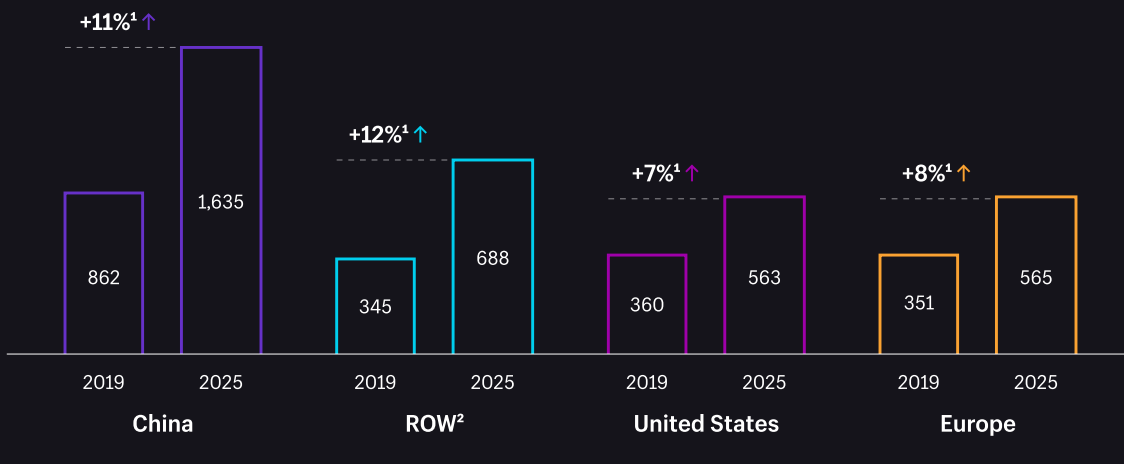
- Fashion: largest ecommerce segment in 2021 with \$759.5 billion worldwide and expected to pass \$1 trillion in 2025
- Toys, hobby, and DIY: moved its ranking from third to second largest segment in 2020, and holding its place in 2021 with \$590.7 billion revenue worldwide
- Electronics and media: third largest ecommerce segment in 2021 worth \$542.4 billion worldwide
- Food and personal care: one of the fastest growing segments with \$468.5 billion in global revenue in 2021, expected to see a 32% increase in 2025
- Furniture and appliances: revenues of \$362.9 billion worldwide in 2021

To decide which regional markets to target, consider Statista's ecommerce revenue forecast:

China has the highest revenue in 2019 and will show a strong growth by 2025

Estimated market development

Worldwide ecommerce revenue forecast 2020 in billions US\$



1: CAGR: Compound Annual Growth Rate / average growth rate per year 2: ROW: rest of the world
 Note: Revenue figures refer to Gross Merchandise Value (GMV); Forecast adjusted for expected impact of COVID-19, November 2020
 Source: Statista Digital Market Outlook 2020

At an expected [\\$2.78 trillion](#) in ecommerce sales by the end of 2021, China is outselling the world. The United States (U.S.) is the second largest ecommerce market with \$843 billion in sales. But there's still over \$433 billion of annual spending in the next three largest national ecommerce markets—the United Kingdom (U.K.), Japan, and South Korea—and another \$834 billion in sales throughout the rest of the world.

Narrow your target by assessing the regional market potential for your business. Your goods or services might not appeal to an entire region, so create country-specific growth profiles, including two key potential growth drivers:

- **Penetration:** Use ecommerce as a percentage of total retail sales in the country you're analyzing to better understand the appetite for online shopping. Although [internet penetration is still lagging in China](#) and most of the Asia Pacific (APAC) region, those who are online are outshopping the rest of the world. [Over half](#) of all retail sales in China are made online, whereas ecommerce accounts for just [13.6%](#) of retail sales in the U.S.
- **Compound annual growth rate (CAGR):** The CAGR for ecommerce sales by country indicates online purchasing momentum.

Retail ecommerce sales CAGR forecast in selected countries

From 2021 to 2025

Turkey	14.6%	Italy	5.5%
Argentina	12.7%	Spain	5.5%
Indonesia	10.2%	Germany	5.3%
South Africa	10%	South Korea	5.2%
India	9.5%	France	5.2%
Brazil	7.2%	Russia	5.1%
China	6.7%	United States	4.6%
Global	6.2%	Australia	4.2%
Japan	6.2%	Mexico	3.7%
Canada	5.6%	United Kingdom	3.4%

Map your global expansion

Understanding the local market, brand fit, and potential ROI

Successfully scaling a global enterprise boils down to earning the [trust](#) of customers across geographic and cultural borders. You can use the six dimensions of national culture from [Hofstede Insights](#) to help your brand effectively engage your target country. The corresponding [country comparison tool](#) gives you instant insights into your target country's culture, which you can apply to your marketing approach.

Here's how Japan, one of 2021's [five largest ecommerce markets](#), scored in a couple of those dimensions:



Individualism: 46/100

The degree to which societies value the individual over the group. More individualistic societies prefer a loose-knit social framework, where people take care of themselves. More collectivist societies prefer a tight-knit social framework, where people expect relatives or members of a particular group to look after them in exchange for loyalty.

Through Western eyes, Japanese culture is seen as collectivist, but individualistic, private, and reserved compared to other Asian cultures. Because of the collectivist tilt, people of Japan highly value maintaining their positions in social groups. That puts reputation at the center of Japanese interactions. In your marketing:

- Use more “we” language than you would in Western marketing campaigns
- Make reviews and testimonials prominent to speak to your brand's reputation



Uncertainty avoidance: 92/100

The degree to which members of a society feel uncomfortable with uncertainty and ambiguity. Countries that are strong in uncertainty avoidance have rigid codes of belief and are intolerant of unorthodox behavior and ideas. Countries that are weak in uncertainty avoidance have a more relaxed attitude, where practice counts more than principles.

The culture values ritual, ceremony, and predictability, and people tend to make changes slowly. Time evaluating risks based on established facts and figures is considered time well spent, so most people invest a lot of time analyzing before beginning—or buying—something new. In your marketing:

- Share all the facts about what makes your product great, not only your product's benefits. Be clear about the materials and processes you use so Japanese customers feel confident in the quality of what you're selling.

- Make your user experience consistent (predictable) across platforms and devices.
- Emphasize quality over price. Aside from being one of the most risk-averse nations in the world, which already motivates shoppers to look for only the best, Japan's urban areas are some of the most densely populated. So it's more space efficient to buy fewer high-quality items than several lower quality items.



Brand fit and estimating ROI

Your estimated ROI (return on investment) is based on how many people want what you're selling, can buy it, and would choose you over a competitor.

You need to know two key inputs:

- **The number of customers in your target market:** Use the [World Factbook](#) for demographic segments. Only account for those who can participate in ecommerce with access to the internet, payment methods, and shipping options.
- **Your offering's penetration rate:** Estimate how many people in the region use the type of product you sell. If the penetration rate is almost 100% for footwear in the U.S., it might be significantly lower in a developing country.

With these estimates, calculate the market [size and value](#):

Market volume = number of target customers × penetration rate

Market value = market volume × average order value

Next, estimate your market share. Either use the competitor share in your target market or a discounted version of your home market share. Use this [framework](#) to evaluate how competitor products are differentiated.

A share estimate helps you predict your market potential with a more sophisticated calculation:

Market potential = total number of potential consumers × market share (percentage of consumers buying from you) × average selling price × average annual consumption

Use this market-potential [worksheet](#) to walk through these calculations step by step.

How to test new regions quickly, easily, and nearly risk free

The top mistake your business can make with global expansion is investing significantly up front before validating that your brand resonates with target consumers. Initially, you need to test, learn, and iterate.

[Research](#) shows that higher international brand awareness correlates with higher ecommerce sales. Brand-agnostic shoppers—those who know what but not who they want—tend to use online marketplaces, making them a great place to experiment before launching a localized online store if you lack brand awareness.

A total of [47%](#) of global online sales takes place on marketplaces. These shoppers value comparison shopping and convenience, and they're finding that value at marketplaces billions of times a month. Here's how those visits are distributed across 2021's top marketplaces:

The world's top online marketplaces



5.2B

visits per month
online at Amazon

Visits per month

eBay	1.7 B
Mercado Libre	683 M
Rakuten	575 M
AliExpress	534 M
Shopee	457 M
Walmart.com	410 M
Etsy	391 M
Taobao	329 M
Pinduoduo	241 M

Map your global expansion

We'll explore how to launch in key marketplaces in a later section.

Testing your entry into a new region through a marketplace reduces risk, but not without drawbacks. Besides negatively impacting margins, brands selling on marketplaces lose the valuable customer behavior data they would get from their own branded site. If you launch an online store, be aware that [marketplace sales](#) can cannibalize sales on your branded store.

Other expansion options

It's possible to experiment in new markets without massive investment or even marketplaces.

1. Launch globally from home

Shopify enables you to sell globally all from a single website. Many businesses use this strategy, especially when targeting a region or country similar to their own in language, culture, and social norms. It works especially well when similar markets are geographically close, like the U.S. and Canada.

We'll look at how to accept multiple currencies on your online store and navigate customs and duties in later sections.

2. Establish a reseller relationship

Consider partnering with third parties already embedded in channels and markets you're not yet established in. For example, if you're selling a tooth-cleaning dog treat, think about using local veterinarians to resell your products and establish credibility for your products.

3. Launch a wholesale channel

Selling your products through brick-and-mortar retailers reduces your risk when entering a new market. It also reveals if other business owners believe your product resonates with an international audience. The important metric to monitor is the reorder rate, which indicates genuine consumer demand and dictates if you can sell direct to consumer.

Learn more about launching a [wholesale channel](#).

Stage 2

Launch your global business



In this stage

- Localizing the customer experience **17**
- Dollars, dinars, or drachmas?
Offering local payment methods
and multiple currencies **22**
- International fulfillment:
Simplifying global logistics
and supply-chain networks **25**
- Cross-border shipping: Establishing
a smart shipping network **27**
- Complying with laws and licenses **29**
- Lower the cost of going global:
Understanding taxes, customs,
and duties **29**

Localizing the customer experience

About half of online shoppers [use a search engine](#) to inspire their shopping, so make sure your international site structure is optimized for search in the countries you're targeting. With international domains, you can use either a country-specific domain (example.de, example.com.au) or a subdomain strategy (de.example.com, au.example.com) within a single Shopify store. When you do this, Shopify handles SEO for you with sitemaps for each domain and hreflang tags automatically created. If you're choosing to expand with multiple stores, you can use the same domain strategy, but you will need to implement [hreflang tags](#) manually.

When localizing your site, be sure to offer a local customer experience by directing visitors to the right store. Here are two options:

- **Tailored recommendations:** If you're selling internationally from a single store, Shopify's [Geolocation app](#) takes care of guiding your users to the correct experience based on their location and browser preferences. If you use multiple stores, there are [third-party apps](#) available to help you with a similar process.
- **Automatic redirection:** Be cautious with this approach because there are many regional regulations that need to be considered. You can let Shopify take care of this for you by enabling [automatic redirection](#) in your store preferences, or you can use a third-party app from our ecosystem if you need to redirect among multiple individual stores.

Google has [86%](#) of the search engine market share worldwide, so it's usually a good bet to focus your SEO efforts there. But Google's share varies widely by country. Yandex has [60%](#) of Russia's search engine market share. A meager [2%](#) of the market share in China belongs to Google because the search engine is banned.

[Identify which search engines](#) are most popular in your target country, segment your users by device type, and allocate your budget accordingly.

Global search engine market share



Google



Bing



Yahoo!



Mail.ru



Yandex



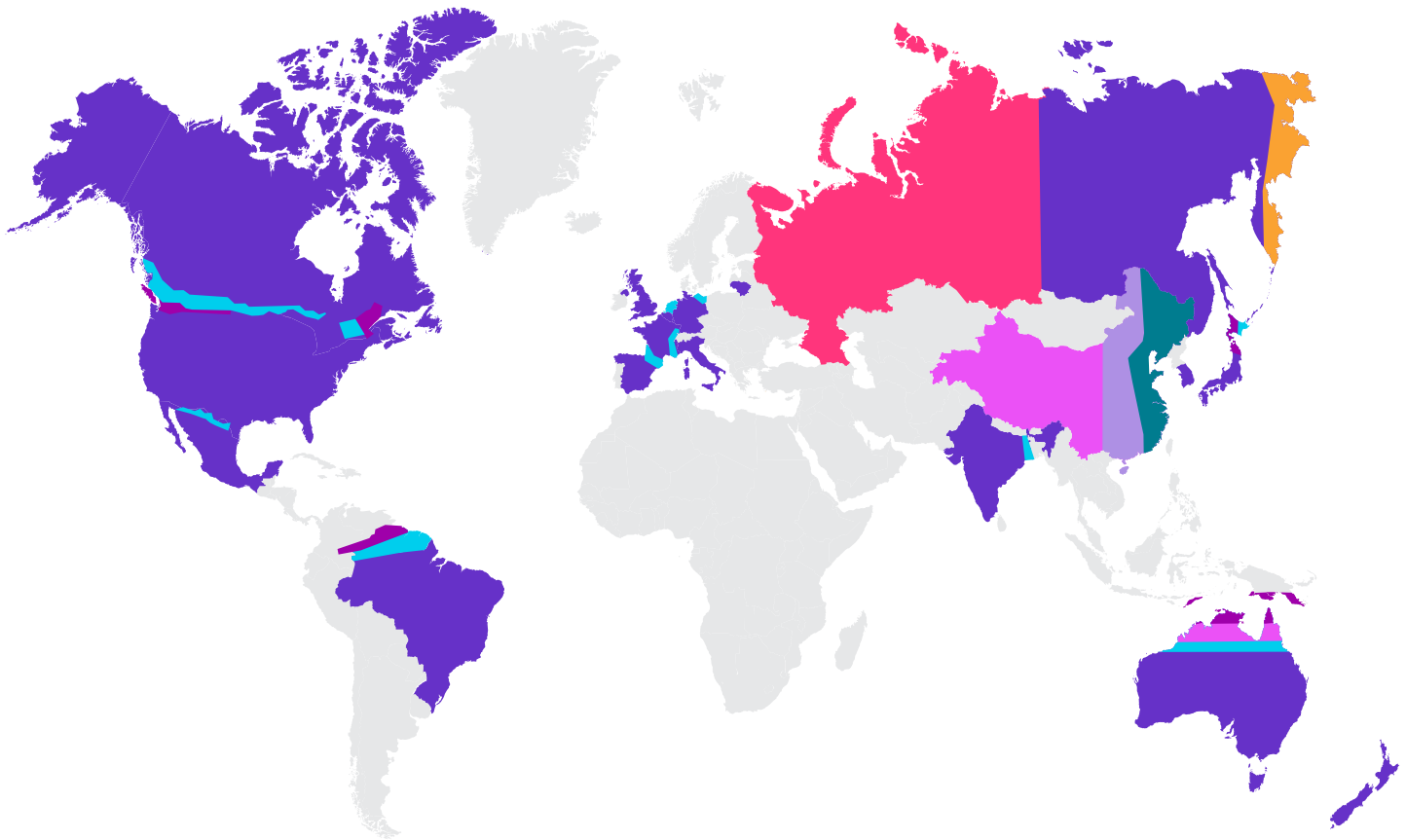
Shenma



Haosou



Baidu



Launch your global business

Source: StatCounter, 2019

If you're using one site to sell in multiple countries with a shared language, include misspellings in your search functionality. Australian shoppers using British English might not find what they're looking for if your search functionality demands error-free American English spelling.

Translating your assets

Eat your fingers off. Barf Soap. Manure Stick. These are just a few of the translation blunders made by some of the [world's best-known brands](#). So make sure you're using a translation service you can trust. Also, consider investing in local talent to check that the translations are appropriate, because a local can use their cultural knowledge to add or remove the nuances that will make your copy stronger. Whatever you do, don't solely rely on Google Translate.

If you find that something about your brand name, tagline, or logo doesn't translate well to your target country, think about [creating a new local brand](#) like Unilever did—in more than [40 countries](#). Unilever unified its ice cream brands by attaching the same Heartbrand logo to different brand names that best fit the target region.



Ten of Unilever's global ice cream brands
Sourced from: [advergize](#)

If you're expanding into markets that aren't similar to your home market, you'll need to translate nearly every facet of your site.

65%

of shoppers prefer content in their language, [even if it's poor quality](#).

75%

Up to [75% of shoppers](#) won't consider buying from a site that isn't in their language, and that goes beyond marketing copy.

Here are two options for offering a native-language shopping experience:

1. Translate and localize from a single store

You can translate a single Shopify Plus store to offer up to 20 additional languages using our multi-language [feature](#) and a [compatible third-party app](#). Depending on the translation solution you choose, you can use machine translations, human or manual translations, or a combination of both. Within a single-store solution, you can ensure your online store, checkout, and email notifications are presented in your customer's preferred language.

Plus, a single-store strategy using Shopify's multi-language feature will mean that SEO best practices are taken care of for you—your site will appear in regional search engines in the correct language.

2. Offer multiple online stores with dedicated languages

If you have unique teams dedicated to running regions of your business in different languages, consider a multi-store approach so you can change the base language of each store's theme. This will then require you to create each of your assets, including products, pages, and email notifications for each store individually, in each language.

If you use a multi-store approach, consider that you will need to manually translate your site's metadata for SEO purposes, including but not limited to:

- Confirmation emails
- Packing slips
- Invoices
- Ads (creative assets)

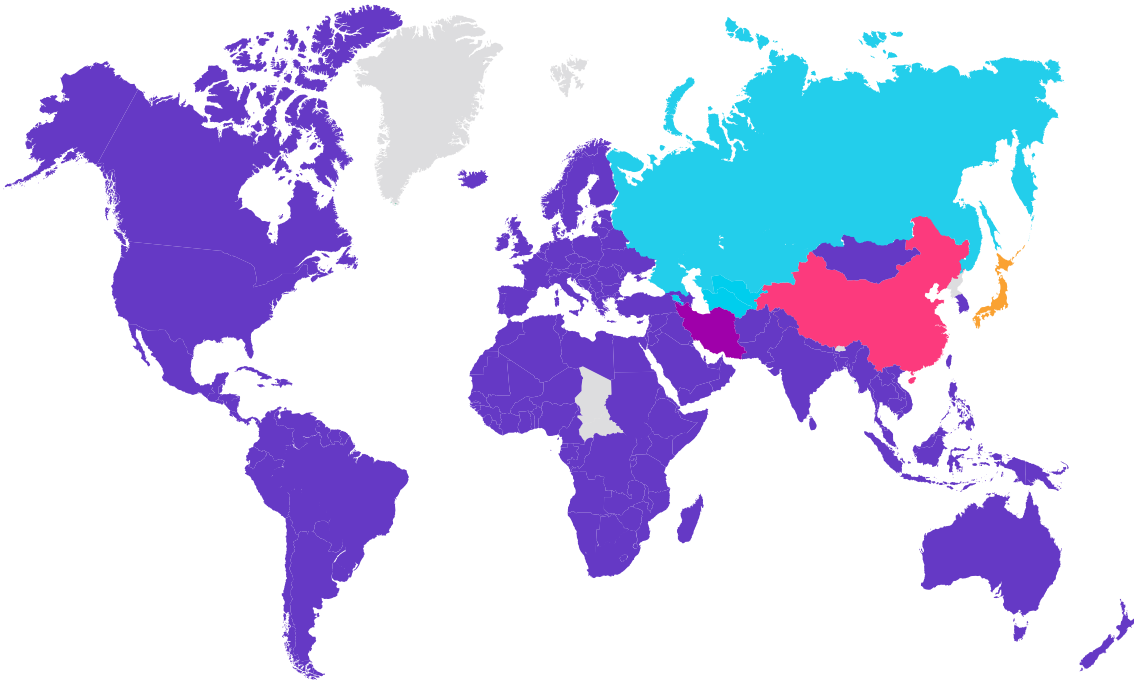
International marketing channels

Be aware that channels that perform well in your home country might not be trusted, or even allowed, in your expansion countries. Facebook is the leading social network in [154 of 167](#) countries, but your target country might have a different leader.

The most popular social networking sites by country

January 2021

Facebook V Kontakte Instagram Twitter WeChat



Source: Alexa/SimilarWeb

Confirm which social network is most popular in your region and consider including competing networks in your global campaigns.

Though not always seen as a channel, online reviews are one of the fastest ways to gain traction and jump-start sales in a new market. Trustworthy reviews are one of the [top five influences](#) on shopping behavior.

Don't make the [same mistake](#) 89% of companies do: Instead of sending the same email to your shoppers in every country, localize your international [email marketing](#) with language, location, currency, and imagery. Take into account the time of year. A winter holiday hero image of a model bundled up in a heavy coat and scarf won't be appropriate for southern-hemisphere consumers in the middle of summer. And always make sure you're compliant with the [anti-spam laws](#) in your expansion country. Fines for breaking these laws can [cost you six figures](#).

Dollars, dinars, or drachmas? Offering local payment methods and multiple currencies

Although credit cards are the most popular payment method in the U.S., that isn't true of the rest of the world. A total of 60% of shoppers in [APAC countries use e-wallets](#). In Germany [only 19%](#) of online shoppers prefer to use debit or credit cards.

With the [worldwide conversion rate](#) at just 2.17%, don't give cross-border shoppers another excuse to leave your store without making a purchase.

Global ecommerce payment methods 2020

by share of transaction volume

Method	Worldwide	Asia Pacific	North America	Europe	Latin America	Middle East and Africa
Digital/mobile wallet	44.5%	60.2%	29.3%	26.4%	19.8%	14.4%
Cred card	22.8%	19.1%	32%	18.9%	36.5%	28%
Debit card	12.8%	5.8%	20.1%	18.8%	16.3%	13.8%
Bank transfer	7.7%	6.5%	5.8%	13%	9.5%	15%
Cash on delivery	3.3%	4.1%	0.7%	3.3%	5.5%	16.4%
Charge & deferred debit card	3.3%	0.8%	7.4%	4.6%	2.6%	3.4%
Buy now pay later	2.1%	0.6%	1.6%	7.4%	0%	-
Direct debit	1.2%	0.3%	0.8%	4%	1.3%	1.8%
Pre-paid card	1.1%	1.1%	0.9%	1.2%	1.4%	4%
PostPay	0.9%	1%	0.9%	0.1%	5.4%	-
PrePay	0.4%	0.2%	0.4%	1.1%	0.8%	1.8%
Other	0.4%	0.3%	-	1.2%	0.8%	1.3%

Launch your global business

Local currencies

International customers expect to check out in their local currency. You can translate your online store perfectly, but unless your international buyers can pay in their local currency, your global ambitions will stall, not scale.

Accepting multiple currencies on your store and checkout

Ninety-two percent of shoppers prefer to make purchases on sites that price in their local currency. But the workarounds, apps, or third-party gateways that enable businesses to sell in multiple currencies aren't always reliable. If you're selling globally on Shopify Plus, take advantage of our [multi-currency solution](#) which lets buyers check out in their preferred currency, while you get paid in your local currency, all from a single store:

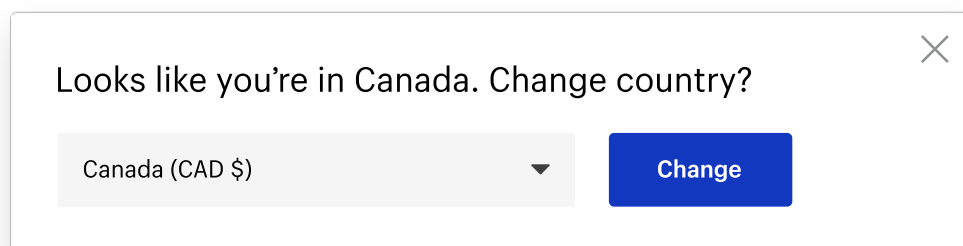
- [Automatically convert](#) your prices based on up-to-date foreign exchange (FX) rates
- Stabilize your prices by stipulating your own FX rate that you want to use
- Take control over your pricing in different countries or regions with [international pricing](#)

If your expansion plans include establishing a physical presence in a foreign country and hiring local employees, you might not want to convert foreign currencies into your local currency for payout. Why expose your business to FX rate risk and conversion fees when you could use those funds as operating capital or salaries? Offering a multi-currency experience should fit strategically with your global expansion strategy.

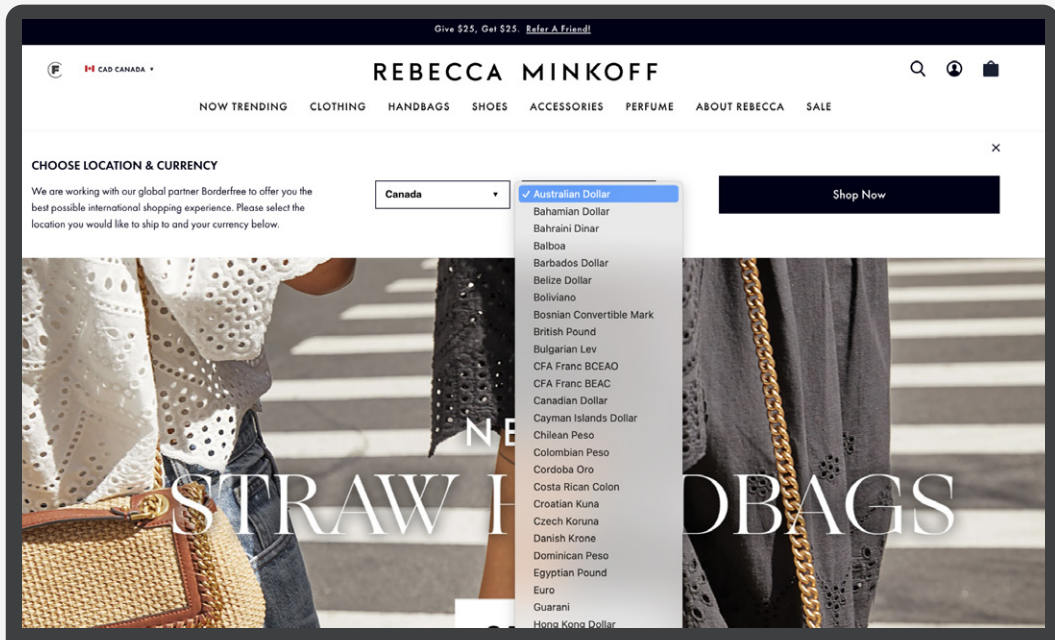
Give customers local pricing options

Using Shopify's Geolocation app, FashionNova automatically detects a shopper's location and offers the option to switch countries/currencies.

Make it easy for your customers to discover their local currency by following one of our options for a [country selector](#) on your online store.



Rebecca Minkoff, a leader in the luxury handbag, apparel, and accessories space, streamlines the checkout process in different regions by letting customers select from more than 70 currencies on the same online store.



Sourced from: [Rebecca Minkoff](https://www.rebeccaminkoff.com)

Launch your global business

Risks of selling in multiple currencies

There are some risks associated with selling in multiple currencies, especially if you source a product in one currency and sell in another. This can create technical complexities, and also expose you to FX drift that erodes your profit margins.

If you're procuring and selling in different currencies, consider using [FX hedging](#) as a way to protect foreign cash flow from currency fluctuations and to preserve profit margins. While a single Shopify store converts and pays you out in a single currency, you can receive your payouts in multiple currencies by using separate Shopify stores for each currency you want to hold.

International fulfillment: Simplifying global logistics and supply-chain networks

To simplify global logistics, you need to solidify your supply-chain and manufacturing strategy. Ask yourself:

- Do I establish a supply chain with manufacturing in my target region?
- Do I build it myself or outsource supply-chain management and fulfillment?

Local manufacturing

COVID-19 put a spotlight on supply-chain risk management, especially for businesses that relied on Chinese manufacturers. Along with [diversifying](#) supply chains, [near-sourcing](#) has become a popular strategy to strengthen supply chains. A shorter chain is a stronger chain: Deliveries can be faster, smaller when needed, and more in your control.

Consider local manufacturing if your products are made in a specialized factory with unique tooling, precision manufacturing, or a highly skilled labor force. The costs of replicating this in another region might be higher than the cost of transporting goods from your current manufacturing facility to your expansion countries.

Operating your own international warehouse

Setting up an international warehouse means a large investment up front, which can be profitable in the long term. If you're planning to ship significant volume to a single country, your own warehouse gives you control over every aspect of the fulfillment process. Choose your warehouse location based on the location of most of your international customers.

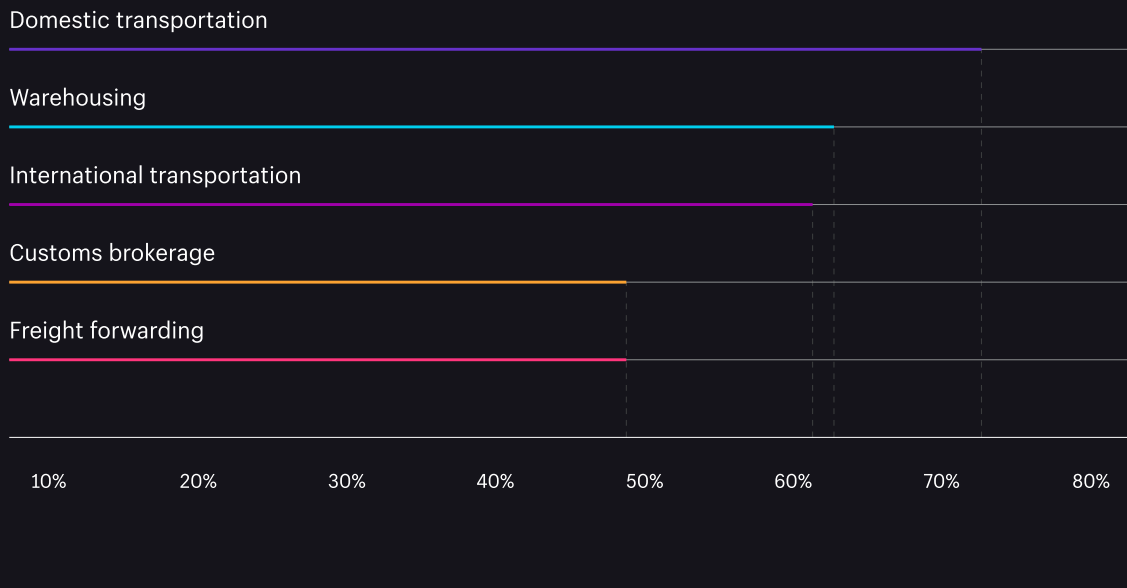
Leasing a warehouse can be a good option too. Consider factors like location, staff facilities, health and safety standards, and language difficulties when communicating with site management. The [International Warehouse Logistics Association](#) can provide information, advice, and contacts to help you open a warehouse in a foreign market.

Outsourcing ecommerce fulfillment

Third-party logistics (3PL) are used in supply-chain management to outsource part or all of the distribution and fulfillment services for a business. Outsourcing fulfillment frees you up to grow and allows you to focus on other parts of your business. Nearly half of ecommerce businesses rely on 3PLs to execute cross-border commerce.

Percentage of 3PL users who outsource logistics services

As of 2020, ranked by the most frequently outsourced services

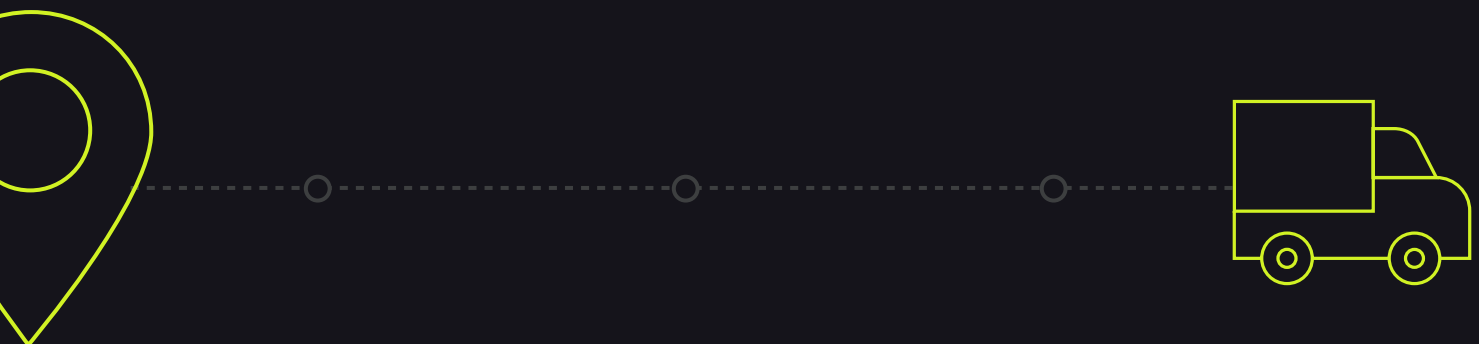


Sources: PennState Smeal (C. John Langley, Jr., Ph.D.); Penske Logistics; Infosys
© Statista 2020

Here are three risks of using a 3PL:

- If delays happen, your customers look to you for resolution, not your faceless 3PL
- Almost all 3PL companies have upfront costs, like integration of their software into your online store, SKU upload, and account access
- Quality-control issues can take longer to resolve because your inventory might be stored overseas

The [largest logistics markets](#) are in China, India, and Japan, but every 3PL operates a little differently. To choose the right 3PL, talk to people who have already expanded in your target regions. And use this [3PL guide](#) to help make your final decision.



Cross-border shipping: Establishing a smart shipping network

Shipping is a significant part of the customer experience. A total of 19% of shoppers will abandon cart if shipping is too slow, but almost half will abandon cart if additional fees like shipping and taxes are higher than expected.

Reasons for abandonments during checkout

“Have you abandoned any online purchases during the checkout process in the past 3 months? If so, for what reasons?”

49%

Extra costs too high (shipping, tax, fees)

24%

The site wanted me to create an account

19%

Delivery was too slow

18%

Too long / complicated checkout process

I didn't trust the site with my credit card information	17%
I couldn't see / calculate total order cost up-front	17%
Website had errors / crashed	12%
Return policy wasn't satisfactory	11%
There weren't enough payment methods	7%
The credit card was declined	4%

4,329 responses / US adults / 2021 / © baymard.com/research
Answers normalized without the 'I was just browsing' option

Understanding total landed cost

Total landed cost includes product cost, door-to-door shipping fees, import and export customs and duties, and tax obligations. Failing to make total landed cost clear to international customers is one of the biggest mistakes made during expansion.

A great way to understand your shipping process is to do a trial run. Try shipping a couple packages before officially launching in your target country. Promises from whichever fulfillment method may or may not be reliable, but if you experience delays and have to pay extra charges amounting to [30% of what you ordered](#), you can address any shipping issues before frustrating and potentially alienating your customers.

Even if your 3PL cannot ship your products internationally, they can advise you about local shipping companies, or offer discounted shipping with preferred shipping partners. If you're shipping from your own international warehouse, be aware of all the extra fees involved, like customs, duties, taxes, and tariffs.

Major carriers have simplified how to calculate shipping costs: DHL, FedEx, UPS, and USPS provide detailed shipping guides on cross-border shipping. Keep in mind that the rules vary by country. Weight limits apply based on the mail class and packaging you use, with a maximum of [70lbs](#). But not all countries accept packages that heavy. Taiwan caps Priority Mail Express® packages at [33lbs](#).

Here are more [USPS country-specific conditions](#).

Packages shipped internationally are charged based on what's larger: actual weight or [volumetric weight](#). Actual weight is how heavy a package is, whereas volumetric weight, or dimensional weight, is how much space a package occupies. Find the dimensional weight of your package with this [calculator](#).

Negotiate rates with private carriers

When your global expansion plan matures and you begin shipping more orders, you can negotiate [volume-based discounts](#) with carriers. In fact, you might already be getting discounted bulk rates when you partner with a 3PL or other shipping partner.

Striking the right balance between speed and affordability is key in cross-border shipping. Establish a threshold for free shipping to ensure customers spend a certain amount to qualify. Learn how to calculate your free-shipping thresholds in this [guide](#).

Though fast and free shipping is a priority, customers also value [control and transparency](#). Let your customer choose the time, place, and method of delivery, and give them real-time updates of where their package is. And if you're not getting your deliveries out fast enough, think about outsourcing or automating part or all of your logistics.

Complying with laws and licenses

Expect to encounter legal requirements that look different in each country you expand to. Most countries legally bind you to the claims you make, so avoid legal problems by making sure you can prove all your claims. If you can't, change them.

If Brexit taught us anything, it's that regulations evolve. So check government websites and advertising platforms regularly to make sure your business is compliant. Ignoring a country's regulations can lead to significant financial consequences, loss of reputation, and, ultimately, a failed expansion.

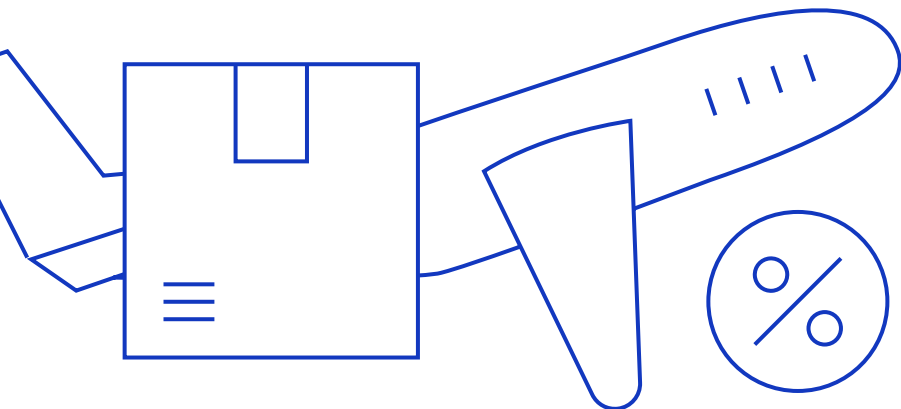
Whether you're planning to sell through multiple channels or a physical store, you need an international business license to operate legally. Business licenses allow governments to monitor business activity and impose taxes. Without proper licensing, you risk expensive penalties. See how licensing and regulations work in some of ecommerce's most important regions in the next section.

Lower the cost of going global: Understanding taxes, customs, and duties

Inaccurate tax and tariff calculations can mean extra fees, shipping delays, fines, and penalties from regulatory authorities. You can handle duties in one of two ways:

- **Delivery duty paid (DDP):** You pay all the taxes and fees that apply to your shipment
- **Delivered at place (DAP):** Your customer pays all associated fees and taxes upon delivery, which is often an unpleasant surprise for your customer

Find out if your products are subject to tariffs with the [FTA Tariff Tool](#).



Import duties

Customs or duties are the tariffs or taxes a government levies on the international sale of goods. Duties are not a fixed percentage, but are determined by key information on your customs forms and are calculated differently in each country. Here are some key factors:

- Quantity and value of the items being shipped
- Cost of shipping
- Class of goods (identified by the harmonized system [[HS](#)] shipping code)
- Insurance

The customs paperwork needed for an international shipment varies country to country, but it typically includes a commercial invoice and an export packing list. Find out if what you sell qualifies for duty-free treatment in your target country, and use this [duty calculator](#) to estimate the duties and taxes on a shipment.

Customs and duties are generally included on a commercial invoice, which is the customer's bill of ownership and payment. The commercial invoice determines the value of the product being shipped including customs, duties, and taxes by using this information:

- Business name
- Customer name and address
- Price, description, and quantity of all products included
- Sale method and terms of payment
- Shipping method

Depending on your shipping carrier, the customs information might already be embedded in the shipping label. DHL Express provides [Paperless Trade](#) to most countries, reducing the need for extra documents.

An export packing list contains information that can expedite international shipments. Typical details on a packing list are buyer, seller or shipper, invoice number, and date of shipment. They can also include more details like:

- Mode of transport
- Carrier information
- Package weight and dimensions (usually metric)
- Package type and quantity
- Handling package marks

Export packing lists allow you to enter an HS code. This [six-digit code](#) categorizes goods and is recognized nearly anywhere you ship your products. It allows border control to apply the correct tariffs without needing to understand the various regional names for the goods coming into the country. Some countries have a few more digits at the end of the code to further identify items, but the first six digits are fully harmonized, which expedites the customs clearance process.

Value-added tax

Though absent in the U.S., [value-added tax](#) (VAT), or goods and services tax (GST) in other regions, is the most common tax levied on consumers. Unlike duties, VAT demands a fixed [percentage per country](#). Every package that crosses almost every international border is subject to VAT. If the shipment is a low-value good, which each country determines in its own currency, the package enters the country at a VAT rate of 0%.

You can reference [this chart](#) to see what value ranges are defined as low-value goods around the world, but always double check the taxation requirements for your target country on the government's website. Find out if your target country is making it easier or harder to pay taxes in this [report](#).

Stage 3

Meet your cross-border markets



In this stage

How to sell in APAC: China, Australia, and New Zealand	33
How to sell in EMEA: U.K. and the EU	48
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Global business spotlight: Vaoala Vanilla	58

Meet your cross-border markets

The world of international commerce commonly divides the globe into three market regions: APAC; Europe, the Middle East, and Africa (EMEA); and North, Central, and South America (AMER). This section will give you an overview of ecommerce opportunities in the key national markets in each region. We'll also give you a heads up about the barriers and hurdles you might face, along with strategies you can use to overcome those hurdles and launch in each region successfully.

How to sell in APAC: China, Australia, and New Zealand

Ecommerce landscape

You've heard APAC is the region to sell in right now, and for good reason. While the world's growth rate is projected at 2% until 2025, [Asia is expected to double that](#). Thirty percent of global consumption will be in Asia, and growth potential is concentrated in Indonesia, Vietnam, and Thailand. But it's China that fuels [over 52%](#) of global ecommerce sales and will likely continue to dominate until at least 2025.

We'll zoom in to what you need to know to sell in China specifically, but one key consumer behavior in APAC is the use of smartphones for online shopping. It's at least [twice as prevalent in Asia](#) than anywhere else. In the third quarter of 2020, [79%](#) of internet users in Indonesia made a purchase from their phones. This statistic is closely followed by Thailand, the Philippines, and Malaysia.

Digitalization transformed APAC into a purchasing powerhouse and saved the region from much of the economic damage other countries experienced due to the pandemic.

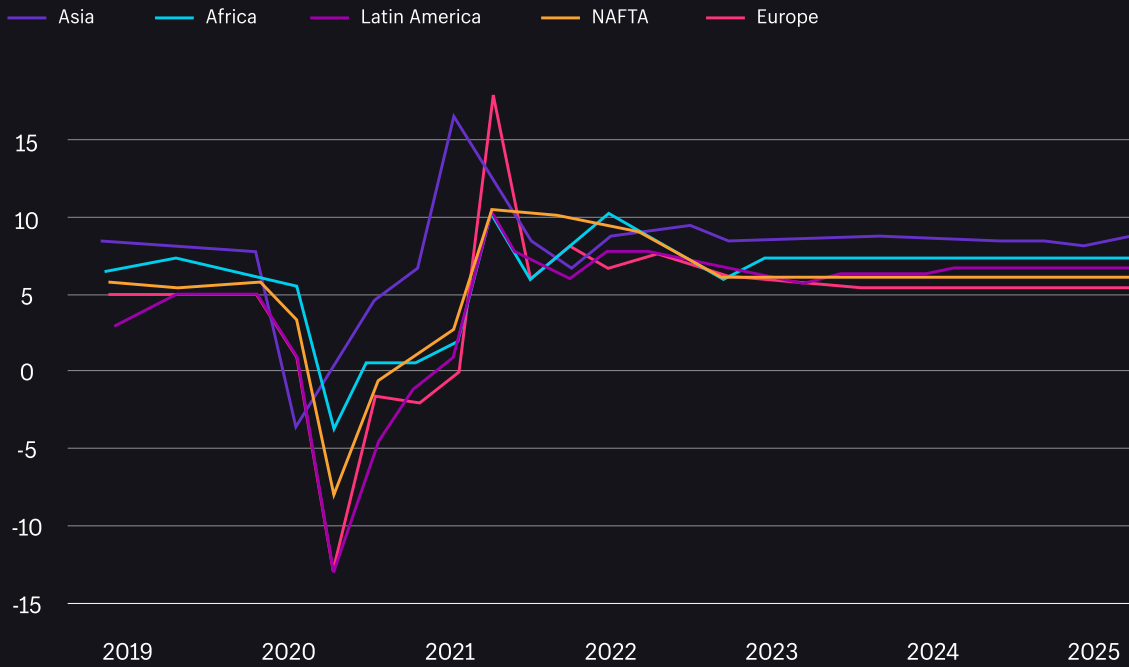
52%

of global ecommerce sales
are carried out in China



In both GDP and ecommerce logistics, Asia is expected to recover faster from the economic effects of COVID-19 than the rest of the world.

Real GDP year-over-year growth, %



Ecommerce logistics market size, 2020-25 growth, EUR billion

Region	Market Size (EUR billion)	Share of growth, %
Asia-Pacific	108.3	57.3%
North America	45.6	24.1%
Europe	23.7	12.6%
Middle East and North Africa	4.2	2.2%
South America	3.6	1.9%
Caucasus, Central Asia, and Russia	2.2	1.2%
Sub-Saharan Africa	1.3	0.7%

Source: GSCI; IHS Markit



China

China is the biggest ecommerce player not only in APAC, but also the world.

Ecommerce sales by country

2021

China	\$2,779 B
US	\$843 B
UK	\$169 B
Japan	\$144 B
South Korea	\$120 B
Germany	\$101 B
France	\$80 B
India	\$67 B
Canada	\$44 B
Spain	\$37 B

Source: eMarketer

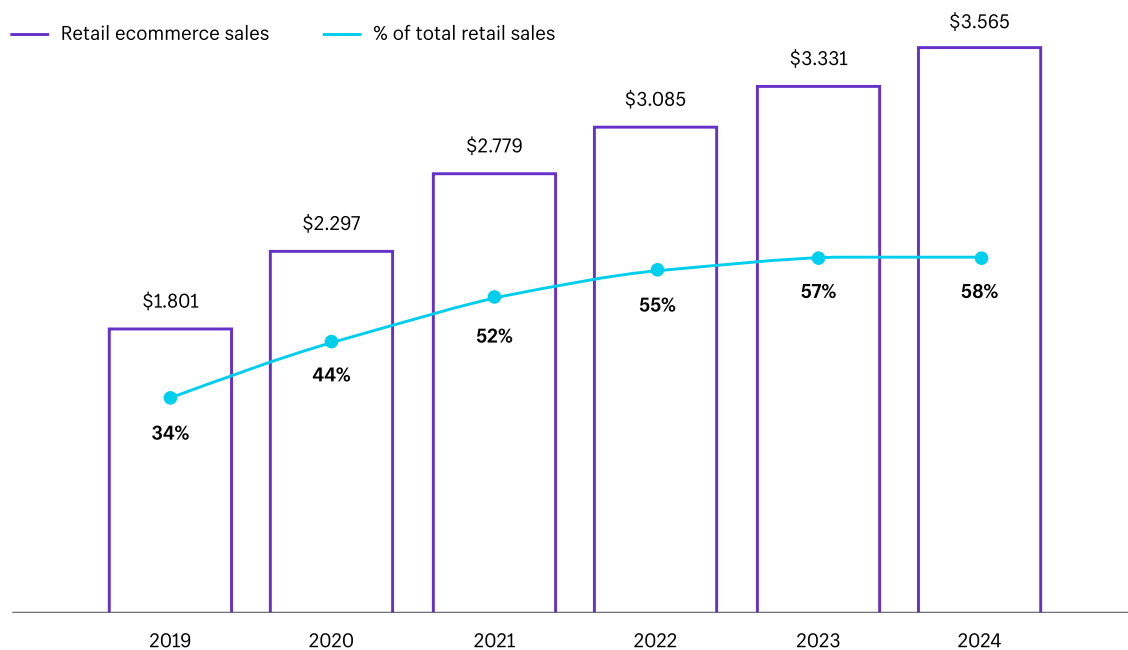
Meet your cross-border markets

The massive ecommerce market will cross a threshold in 2021 that no other country has ever crossed:

Online sales will surpass offline sales.

Retail ecommerce sales in China, 2019-2024

trillions and % of total retail sales



Meet your cross-border markets

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes or money transfers, food services and drinking place sales, gambling and other vice good sales; excludes Hong Kong
Source: eMarketer, Dec 2020

Payment methods have digitalized almost as quickly as shopping methods. Almost 56% of ecommerce payments are completed on a mobile device, with about 99% of those transactions going through two apps: Alipay and WeChat Pay.

The tech giants these apps belong to, Alibaba and Tencent, dominate the Chinese digital space.

Tencent owns the messaging and social apps, WeChat and QQ, the first and sixth leading apps, respectively. Aside from the [third leading](#) video platform, Youku, Alibaba owns the second most used app, Alipay, and the C2C ecommerce app, Taobao, listed third.

Monthly active users of the leading apps in China

March 2021 (in millions)

WeChat	1,004.93
Alipay	845
Taobao	750.91
Pinduoduo	740.3
Douyin	686.48
QQ	638.81
iQiyi	605.79
Tencent Video	605.79
Baidu	494.08
Sogou Pinyin	468.57
Sina Weibo	460.35
Gaode Map	429.57
Kuaishou (Kwai)	413.52
Baidu Map	405.53
QQ Search Engine	329.24
WiFi Master	314.35
Toutiao	303.94
JD.com	302.18
Huawei App Store	298.41
Tencent News	284.53

Meet your cross-border markets

Marketplaces

One way foreign brands begin navigating China's complex digital ecosystem is by launching first through a marketplace like [Tmall](#). Tmall is the direct-to-consumer counterpart to Taobao, together making up [58.2%](#) of China's ecommerce market in 2021.

Tmall

To operate on Tmall as a foreign brand, you'll need to [select a Tmall Partner](#) (TP). Depending on which agency you choose, a TP can do just about everything for you, including creating an operation plan; inputting product information; operating the day-to-day product management, marketing, and promotions; providing customer service; and providing operations reports and analyses.

There are a few ways to find your TP:

- Check Alibaba's [Tmall Partner listing](#).
- Have your [current partner](#) certified as a TP.
- [Contact Tmall directly](#). If your brand is pre-approved to sell on Tmall, Alibaba will reach out to relevant TPs then connect you with those interested in your brand.

Before making a decision, take time to interview TPs and determine who you think would be the best fit for your brand. Here are some ways to identify the quality of a TP:

- 1. Sales:** TPs usually have a list of clients on their website, so you can check the performance of the clients they manage. Note that large clients might use several TPs for different parts of their operations (for example, customer service, product design, or advertising). In these cases, use an online solution like [Dianchacha](#) to get the total amount of sales.
- 2. Rankings and industry focus:** Find TPs that have clients in your industry through Tmall's [TP ranking](#), which includes the number of stores a TP operates in each industry.
- 3. Public filings:** Big TPs often go public, so you can discover their revenue, growth, and client information through public filings.

Be prepared to pay more for the well-known TPs. They know they provide connections, visibility, and confidence others can't, so will often charge double or triple the price of other TPs. Among setup fees, monthly fees, advertising fees, and commission, brands aiming at a \$1 million revenue for their first year on Tmall might [spend the same amount](#) on TP and marketing fees.

Once you select a TP, you can use the same partner on other platforms. Most brands start with one marketplace and then diversify once they've started to succeed there. Other platforms have specialties or perks you might find relevant:

- **JD.com** leads in the electronics category, but its stand-out feature is its proprietary logistics system that provides customers [same-day](#) or next-day delivery. Tmall can rarely match that speed, giving JD.com an edge over Tmall in large cities.
- **Suning** is a brick-and-mortar electronics store turned e-tailer. The platform's most popular categories are smartphones and home electronics.
- **Weipinhui** specializes in cosmetics and beauty.
- **Pinduoduo** is one of the fastest growing ecommerce platforms, known for connecting consumers with farmers and distributors. It was one of the earliest adopters of a [group buying function](#): The more people buy a product, the more the price is discounted.

Other marketplaces [like Alibaba](#) have since introduced a group buying function. The social aspect of ecommerce has been central to the online market, which is why launching first through a multi-purpose social platform like WeChat is one of the most common ways foreign brands enter the Chinese ecommerce market.

WeChat

It began in 2011 as a simple messaging app. In a few short years, [WeChat](#) evolved into an electronic wallet, an online shopping hub, and China's most popular app, making it one of the easiest ways to promote your cross-border store to Chinese consumers.

The app fuses the best of Facebook, WhatsApp, and Paypal:

- **WeChat chat interface:** Similar to Facebook Messenger, brand posts show up here instead of a main social timeline as with Facebook or Instagram. Send your customers promotions and updates directly to their chat to keep them engaged.
- **WeChat Moments:** This is the timeline of WeChat. For users, it's a place to share and access news from their friends. For brands, it's the home for one of the [three main ways](#) to advertise on WeChat (alongside article advertising and influencer advertising).
- **WeChat Wallet:** With one tap, users have access to pretty much anything transaction related, including payment services, money transfers, flights, movie tickets, and property listings. The ease of one-click payment for customers means a better sales conversion rate for you.

You could develop your own ecommerce store on WeChat, but companies use a third-party WeChat Trade Partner. Like a Tmall Partner, a WeChat Trade Partner walks you through the process of [creating your WeChat store](#).

Find a WeChat Trade Partner

WeChat doesn't provide an official list of its partners, so WalktheChat has laid out steps you can take to [find a Trade Partner](#). Some WeChat Trade Partners might integrate with the ecommerce solution you're already using. If you're a Shopify merchant, WalktheChat published a sales channel on the [Shopify App store](#) that optimizes your WeChat launch and integrates seamlessly with your Shopify store.

Unlike a Tmall Partner, WeChat Trade Partners usually charge fixed fees, and at a much lower rate—possibly only [a tenth](#) of the investment in a Tmall Partner.

A downside of WeChat is that its search feature is internal only, not a search engine. This rate—possibly only a tenth of the investment in a Tmall Partner.

A downside of WeChat is that its search feature is internal only, not a search engine. This means your WeChat store traffic will come mainly from user shares, ads, or influencers.

If you're not ready to localize your store for China, try the [Beyond App](#) for [an instant mobile sales channel to China](#).

Beyond

Beyond gives Chinese consumers a mobile shopping experience they'll recognize: a familiar, easy-to-navigate interface with e-wallet payment options like WeChat Pay and Alipay. But it's the foreign experience that keeps over [14 million](#) shoppers coming back to Beyond.

Chinese consumers get the same prices and packaging an American or European shopper gets. Everything is shipped right from the U.S. or European merchant, which is not always a possibility for Western retailers but appealing for the Chinese shopper who wants an authentic Western ecommerce experience.

[Shipping transparency](#) gives Beyond App users additional confidence. Shoppers can follow every step of their products' journeys across the world.

The Beyond App translates and categorizes your products for its shoppers, and you can [sync those sales with your Shopify store](#).

Affiliate publishing network

Getting visibility on an affiliate publishing network is like landing on a top 10 products list from BuzzFeed. These websites have large active audiences and frequently connect Chinese shoppers with cross-border brands across multiple industries like electronics, health, and fashion. The top three platforms Chinese shoppers frequent are [Dealmoon](#), [55HaiTao](#), and [SMZDM](#).

Culture and marketing

WeChat makes it easy to work with [influencers](#), and many global brands have taken advantage of that. Besides the invaluable social proofing influencers provide for new brands, influencer posts can link directly to a product page. WeChat users can go from content to purchase in a click. And as of 2020, the influencer-transaction integration in WeChat mini-programs [now includes live streaming](#).

Livestream shopping

Live streaming has already established itself as a popular marketing trend across other platforms in China, and the APAC region in general. For customers who love the convenience of online shopping but miss the in-store experience, livestream shopping, or live ecommerce, is the best of both worlds. Retailers use anything from live auctions to live events to influencer streaming to interact with their customers in real time.

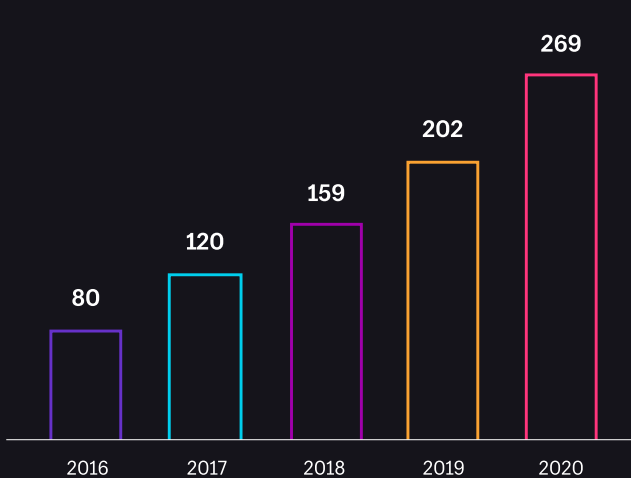
Livestream shopping festivals

Your marketing calendar might include some of the traditional festivals and official holidays, traditions like Tomb Sweeping Day, the Dragon Boat Festival, and National Day, which lasts five days. But it's China's shopping festivals that are accelerating sales, and the pandemic has given live engagement on these days an additional boost.

Meet your cross-border markets

Spotlight: the midyear shopping festival 618

Gross merchandise volume of JD.com during China's 618 shopping festival from 2016 to 2020 (in billion yuan)



From JD anniversary to a sales bonanza

The midyear shopping festival, also known as 618, as it runs from June 1 to 18 each year, was the first launched online by JD.com for its anniversary in 2004. The e-retailer promoted its 618 campaign to a larger marketing scale in 2009 for the first time. That year, sales on June 18 alone exceeded 30 million yuan. JD.com did not wait long to turn this one-day event into a month-long celebration.

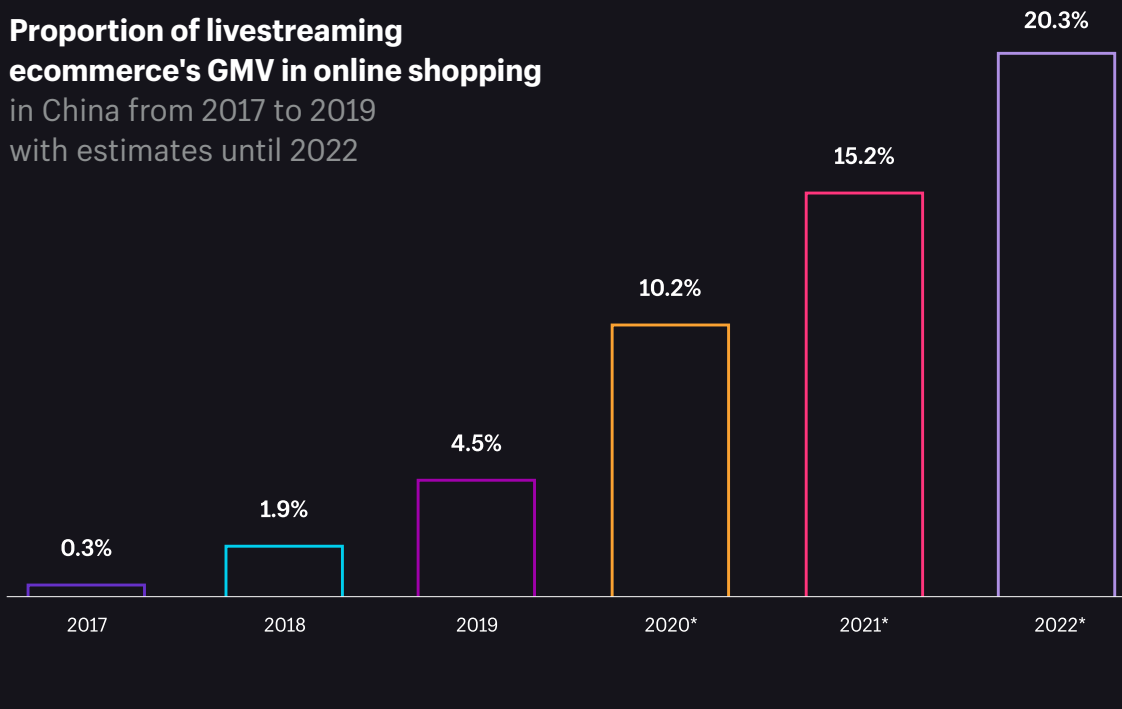
618 has become one of the major ecommerce battles. Despite the coronavirus pandemic (or possibly because of it), online sales were high. Across the 18-day sale in 2020, about 331 million people were estimated to have watched shopping-related streaming.

Note: China; 2016 to 2020
Source(s): WalktheChat.JD.com; ID 1128633

And, of course, [Singles' Day](#): China's unofficial Black Friday that takes place on November 11. Nicknamed for its date of 11-11, the week leading up to Singles' Day generated [\\$74.1 billion](#) in sales in 2020.

China once again leads in live ecommerce, [nearly hitting 1 trillion yuan](#) (~US\$150 billion) in 2020. Livestream shopping is getting more popular in China every year.

Proportion of livestreaming ecommerce's GMV in online shopping in China from 2017 to 2019 with estimates until 2022



Source: Statista

Although livestream shopping generates over [60 times more revenue in China](#) than in the [U.S.](#), [about half of online shoppers in China](#) see it as less convenient than independent browsing. So consider your industry and the age of your target customer when you decide whether to use livestream in your marketing. [Most livestream shoppers are in their 20s](#) and buying fashion, accessories, jewelry, and skincare—but 2020 saw a rise in the success of live ecommerce throughout nearly all industries. Consumers can now even find [farmers promoting their produce by livestream](#).

But Facebook, Twitter, and YouTube are not the go-to sites for live streaming in China as they are in much of the West. Access to these websites is blocked by the Chinese government. Instead, shoppers turn to channels like Taobao Live, the live-streaming channel created by Alibaba, which accounted for [61% of live ecommerce in 2020](#).

Rules and regulations

Climbing the Great Firewall of China

[The Great Firewall](#) is how the Chinese government and its technology partners censor what comes in and out of the country. Discord, disagreement, and disloyalty are censored or banned. So are [many of the services](#) offered by Google, Facebook, and Reddit.

Licensing

The Great Firewall doesn't only block social media sites. The government also uses the digital blockade to limit foreign influence—which means you, unless you have the proper licensing.

A commercial internet content provider (ICP) [license](#) prevents your foreign-owned online store from being blocked and lets you engage in payment integration and online sales. You'll need a Chinese business license before you can apply for an ICP. To expedite the process, get help from companies that understand the Chinese business landscape, like [Twinova](#).

Chinese internet service providers might also block your site shoppers if it doesn't approve of your business or the tools you use, including Google:

- Anything hosted on Google's API (scripts or stylesheets) won't load, so [your site won't be fully functional](#) or will time out
- Advanced features might not perform well, like retargeting in Google Analytics or customer behavior tracking in Google Tag Manager

To make sure your website is seen on the other side of the Great Firewall, it's important you invest in an active social media presence on platforms like Weibo, xiaohongshu, Bytedance, and WeChat. If you're selling into China on Shopify, our content delivery network (CDN) will ensure your content loads reliably.

You can also exclude links to third-party social media channels banned in China without negatively impacting your home-country and regional stores, depending on the intricacies of your ecommerce platform.

Or think about tapping the Chinese market from afar.

Fulfillment and taxes

The logistics infrastructure in China has exploded in recent years. So much so, most residents of big cities are accustomed to 24-hour-or-less delivery times.

It's become easier for international brands to get foreign goods to China, but once they get to the border, regulations and import customs clearance remain complex. Cross-border ecommerce zones are the Chinese government's solution.

Each zone has bonded warehouses where products are pre-declared and stored at a modest cost, which means faster delivery. You can also use bonded warehouses to [manufacture, assemble, and re-export products overseas](#) without going through customs again or paying additional duties.

By 2020, there were 105 of these zones across 30 Chinese provinces, and more are expected to be built in coming years. You can take advantage of cross-border ecommerce zones, plus a 30% reduction on VAT, if you're selling items on China's [Positive List](#). There are 1413 product categories on the list as of January 2020. If your goods don't make the Positive List, you can still ship directly to your consumer through postal and courier models. Just expect [higher tax rates and slower product registration and customs clearance](#).



Australia and New Zealand (ANZ)

Ecommerce landscape

Every [two out of three New Zealanders](#) said they spent less overall because of the pandemic, but, like the rest of the world, COVID-19 has pushed New Zealand commerce into the digital world: 33% of New Zealanders said they moved their shopping from physical to online stores. Of the almost 5 million people in New Zealand, [88%](#) are online in search of something to buy.

In Australia 200,000 [new shoppers](#) entered the ecommerce market in 2020. The grocery delivery category in Australia grew [81%](#) between 2016 and 2021, but Aussies are still growing the fashion and beauty ecommerce markets more than any other categories. The growing middle and upper classes in Australia are bringing ecommerce revenues toward [US\\$35 billion](#), and [40%](#) of the goods Australians are purchasing are from the U.S. Altogether, the ANZ ecommerce market saw the highest growth in the world in the second and third quarters of 2020 at an impressive [107%](#).

Marketplaces

Australia and New Zealand are among the [easiest places](#) to do business, but with 30 million people spanning eight time zones and almost as much land as the U.S., shipments and timely customer support can be a challenge.

If you enter ANZ ecommerce through an online marketplace, you can take advantage of established fulfillment centers. Start with the most popular marketplaces in ANZ:

The largest online marketplaces in Australia and New Zealand

eBay	63.3 M
Amazon	25.8 M
Trade Me	18.8 M
Catch.com.au	7.8 M
The Iconic	5.8 M
MyDeal.com.au	2.4 M

Source: webretailer

Although Amazon is growing in popularity throughout ANZ since its start in [Australia in 2017](#), eBay is the clear leader, which is unprecedented. [Australia is the only country](#) whose internet users visit eBay more than Amazon.

Australia also powers the majority of traffic in the last three marketplaces on the list, including Catch, which [integrates seamlessly with Shopify](#) and is Australia's largest daily deals site. But only 3% of visits to the auction and classifieds site, Trade Me, come from Australia. New Zealanders visit Trade Me more often than anywhere else online, aside from Google, YouTube, and Facebook.

Localization

Click Frenzy

If there's one Australia-based event that spikes ecommerce revenue in ANZ every year, it's [Click Frenzy](#). From one main event every November since 2012, there are now five themed Click Frenzy events a year. Shoppers can find the best deals on the Click Frenzy site, then they're redirected to the brand's store. Over the three-day event in May 2020, there were 1.9 million visits, which was [twice as many visits](#) as the previous year. Heightened traffic translated to nearly 50% growth for the top 50 brands partnered with Click Frenzy—including foreign brands. With the help of Cyber Monday and Black Friday, November 2020 saw the [highest online sales](#) in Australia's history.

International and local brands alike need to sell at least one product at a deep discount to [register](#) with Click Frenzy, so [weigh the pros and cons](#) of gaining visibility and brand recognition through this platform—or through its marketplace counterpart, Frenz Central. Mark Gray, the director of the new marketplace, believes that the best customer experience comes from “giving merchants the ability to [tell their story](#) and to be discovered.” Frenz Central just launched in 2021, but based on Gray's approach, entering ANZ through this marketplace might be worth considering.

Your online store

Make sure your local site is optimized for your ANZ customers to discover your brand from their phones: Just under [half of online purchases](#) in New Zealand are through a mobile phone or tablet. Your payment method selection should include the most [popular in New Zealand](#) and [Australia](#): credit card, e-wallet, and bank transfer.

Opt for conversational copy: Voice search has become the most popular way for Australians to use search engines, accounting for [57%](#) of searches as of 2021.

Meet your cross-border markets

**Including video posts
can ramp up your traffic
in search engines by**

157%

Fulfillment and taxes

Before July 2018, Australia collected taxes and duties on goods AU\$1,000 and over, letting anything valued less enter the country tax and duty free. Then as ecommerce boomed, so did the volume of low-value goods crossing international borders. The Australian government didn't want to miss out on that extra revenue. But it also didn't want the extra burden of processing tax on so many more items. Australia's solution? Charge GST on low-value goods and move the burden of collecting that tax to the retailer.

That means Australian customers continue to pay GST directly to the government when goods worth AU\$1,000 or more cross the border. But if you're selling goods to customers that are less than AU\$1,000, you have to charge customers 10% GST at the point of sale. You'll also need to:

- Show GST on your invoices
- Let customs know GST has been charged when bringing goods into Australia

You [might not need to register for GST](#) if you sell exclusively through a marketplace, or if you don't think you'll sell more than AU\$75,000 of low-value goods in Australia for the year.

Australia's new taxation system worked so well that New Zealand, Norway, Switzerland, Indonesia, and most recently the U.K. followed with similar models.

The threshold to register for GST in New Zealand is [NZ\\$60,000](#) a year in sales.

How to sell in EMEA: The U.K. and the EU



U.K.

Ecommerce landscape

After years of complex negotiations, the U.K. officially divorced the European Union (EU) in 2020. Despite the adjustments the region has had to make, the U.K.'s ecommerce market continues to thrive. British consumers spend [more per capita](#) than the rest of Europe, which will push revenues from US\$104 billion in 2021 to almost [US\\$120 billion](#) in 2025. About one third of all retail sales will happen digitally by [2024](#), and [33%](#) of those online sales will be fashion purchases, the largest segment of the British ecommerce market.

January 2021 marked the end of the Brexit transition period and brought with it some changes to ecommerce regulations throughout the region.

Fulfillment and taxes

If you're selling from outside the U.K., the changes to the taxation system is Brexit's biggest disruption. As of January 1, 2021, DAP is no longer an option for sales under £135. You are responsible for collecting VAT on every sale and remitting the tax to the government. So if you've sold into the U.K. since January 1, 2021, or plan to in the [next 30 days](#), you'll need to register for VAT.

Expect a lengthy and tedious registration process. If you haven't requested your [VAT ID](#) yet, get started as soon as possible so you don't get penalized. Once you receive your VAT ID, you'll be given a payment schedule unique to you.

What if your only order into the U.K. was a loafah for £2? You still have to register for VAT. What if you use 3PLs for fulfillment, so the goods were already in the U.K. when the customer purchased from your online store? If you're selling to an address in Great Britain or Northern Ireland and you're not a U.K. seller, you still need to register for VAT to avoid fines or blocked goods. The only exceptions are if:

- All your products are [zero-rated](#) (though you'll still need to apply to be exempt from registration).
- You're selling solely through a marketplace. The marketplace will automatically add the VAT to any low-value goods you're selling, and that marketplace will remit the correct tax to the U.K. government.

If you've already registered for VAT to comply with the U.K.'s pre-Brexit tax requirements, you don't need to register again. Note that orders above £135 are still subject to duties and import VAT.

Marketplaces

With all the taxation changes, entering the market under the umbrella of a marketplace might serve not only your visibility, but also your sanity. Online shoppers in the U.K. are [four times more likely](#) to order from online marketplaces than directly from retailers, especially if that marketplace is Amazon.

Amazon.co.uk is ranked tenth in the world and, unsurprisingly, first in the U.K. Here's the rest of the top ten:

The largest online marketplaces in the U.K.

Amazon	407 M
eBay	297.9 M
Etsy	36 M
Wayfair	24.1 M
OnBuy	8.2 M
ManoMano	4.7 M
Zalando	4.1 M
notonthehighstreet	4 M
GAME	2.9 M
StockX	2.8 M

Source: webretailer

Meet your cross-border markets

If you already have a Shopify store, you can sell on the U.K.'s top two marketplaces [through your online store](#). But don't overlook homegrown players like [Trouva](#), a curated marketplace that offers hard-to-find products from independent boutiques around the world.

Localization: Culture and marketing

The U.K. is home to one of the world's most competitive ecommerce markets. Its maturity in the digital space has given big marketplaces time to establish deep roots (think Amazon and Aliexpress), [which has also diminished brand loyalty](#). So be intentional about boosting brand engagement as you plan your marketing strategy in the U.K. Consider incorporating a few approaches:

- Offer a loyalty program. They're one of the most [effective engagement strategies](#), and it's no wonder: You show your value for them, and they better value you. It's a win-win. Check out smile.io, LoyaltyLion, or [another loyalty partner](#) to set up your loyalty program.
- Make sure your site's mobile experience is fully integrated with your desktop user interface.
- Engage with your audience through social media advertising. More than [72%](#) of the U.K. is active on social media, especially on [YouTube and Facebook](#).
- Connect with British values. The rise of secondhand and fashion rental markets, particularly among Generation Z shoppers, reflects the consumer mindset in the U.K.: sustainability. The mindful shopper looks for product features like ethical manufacturing, eco-friendly packaging, and sustainable return methods. Just be sure your practices are financially sustainable too, because most consumers in the U.K. [aren't ready to pay extra](#) for sustainable retail.
- Test the market with a pop-up shop for rent through companies like [AppearHere](#), and use [Shopify POS](#) to unify your online and in-store sales.

Also be sure to offer the U.K.'s preferred payment methods. [In 2021](#) 44% of ecommerce sales will be paid by credit cards, but e-wallets are encroaching on their popularity. Card purchases dropped 3% since 2018, and now almost a quarter of online shopping is done through e-wallet. Direct debit is used for 11% of online purchases, followed by bank transfer and e-invoice.



EU member states

Ecommerce landscape and post-Brexit taxes

The EU is the third largest market in the world, projected to see [revenues of US\\$565.9 billion by 2025](#). Taxes on the low-value goods that contribute to that market will be handled differently at European borders as of July 1, 2021. These changes were scheduled to take place on January 1, 2021, along with the U.K.'s new VAT system, but with the upheaval caused by the pandemic, the EU [decided to delay the changes by six months](#). The tax rules of summer 2021 determine where you're charged [VAT](#) and how you pay it:

1. You pay taxes based on where the customer is.

If you're an EU business that sells less than €10,000 a year, there's no need to register for foreign VAT. Selling above that threshold requires you to pay the VAT set by each EU country you sell to. For example, if you sell €80,000 in 2022, you're well above the threshold so you must register for VAT. €30,000 of your sales was in France and €50,000 in Germany, you pay taxes on the €30,000 based on French taxes rules and the €50,000 based on German tax rules. Non-EU sellers, which now includes the U.K., must register for VAT as soon as they cross €0.

This VAT change applies to all shipments under €150. Import [VAT for shipments over €150 will still be paid to customs](#). And just as with the U.K., low-value goods will also be taxed starting July. The €22 import VAT exemption will disappear.

2. You'll pay VAT to all EU countries on shipments €150 or below through one system—a one-stop shop (OSS).

Instead of filing VAT in every European country you sell in, if you're an EU business, you can file an OSS VAT return in the same place you file your domestic VAT return. Your domestic tax authority will forward the taxes to the right countries. For non-EU businesses, you'll use the import branch of the OSS (the IOSS): Just choose one EU country to register with and complete your IOSS filing through that country's tax authority.

A few things to note:

- If you don't register for VAT when your sales exceed the annual sales threshold of the European country you're selling to, you could face fines and your shipments might be blocked at the border.
- [Registering](#) in the OSS is optional, but if you choose not to register, your [customers get stuck paying VAT](#) and possibly a customs clearance fee, which might mean [losing customers](#).

- Under the new regulations, you aren't responsible for charging or collecting VAT on sales under [€150](#) that you sell through a marketplace. Everything under €150 will be charged to the customer at the point of sale through the marketplace.
- If you ship several low-value items to one buyer, and the total value of that package exceeds €150, OSS is not applicable. The EU country will tax the items when the package crosses its border.
- Excisable goods like alcohol and tobacco aren't covered by the OSS.

Rules and regulations

Keep your eye out for rules unique to your target country in the EU. In Germany you could be [fined €\\$50,000](#) if you don't state somewhere on your site that you own and authored everything on it. But there are some regulations that apply across the EU, like those regarding HS codes and geo-blocking.

HS codes

The first six digits of the HS code for each product will be the same for every EU nation you ship to, but you'll need to tailor any digits after that to match each country's HS code classification. If you ship to multiple EU countries, keeping HS codes straight can get complicated. Getting your HS codes wrong could mean paying the wrong duties, delayed or blocked shipments, and fines. [Avalara's classification service](#) can help you make sure you have the right HS code for your product, or you can search HS codes in [this database](#). Keep track of your products' HS codes in your [Shopify admin](#).

GDPR and geo-blocking in the EU

The EU's General Data Protection Regulation (GDPR) protects a customer's rights over personal data, including their name, address, email address, social media accounts, and digital identifiers (like an internet protocol [IP] address or cookie identification).

As a business, you collect, save, and delete your customers' data. Even if your business isn't located in Europe, if your goods and services are available there, the GDPR might apply to you. Learn more about this regulation in our [GDPR whitepaper](#).

[Geo-blocking](#) legislation prohibits businesses from discriminating against customers based on their location. Since December 2018, businesses can't automatically redirect customers to country-specific websites on the basis of their IP address. For instance, it's illegal to forward an Italian customer shopping on a German website to the Italian version of that shop.

Also, if you don't deliver your products to certain EU states, you need to give your international customers the option to collect it at your business premises or to organize delivery independently.

Localization: Culture and marketing

Once you get compliance matters in order, tailor your marketing calendar to each country you're launching in. Religion, national holidays, and popular shopping seasons should be top of mind. The Sant Jordi Festival in Spain always means millions of dollars of roses and books sold every April. Even during the COVID-19 pandemic, Spanish customers bought [four million roses and one million books](#) to gift loved ones in honor of Catalonia's patron saint.

Be cognizant of local vacations too. Many Norwegians take three weeks of vacation in July, German summer vacations start later in August, and 40% of firms stop trading during France's month-long August break.

Here are a few other nuances to keep in mind when entering Europe's various national markets:

- **Italy's** [top payment methods](#) are similar to the rest of Europe: credit cards, digital wallet, and bank transfer. But almost all Italian customers want the option of paying [cash on delivery](#).
- **France** legislates when businesses have sales. There are two [compulsory sales periods](#) a year that all businesses—including foreign online brands—must respect. Brands can discount items outside of those periods, but the word “sale” is reserved for the designated sales periods. Make sure to familiarize yourself with the rules on how to participate in the sales periods as well, because everything from how to display prices to return policies are regulated.
- **Germany** has the [highest conversion rate](#), which might contribute to the [high return rates](#). In the fashion segment, [second in size](#) only to electronics and media, return rates can be as high as [70%](#).

Some of these returns are unavoidable, so you'll need a simple, cost-effective return policy, but you can prevent some returns: Provide detailed product descriptions, show 360-degree views of each product, and consider giving customers an [augmented reality \(AR\)](#) shopping experience. It's also important that German customers can ask questions when and how they want. Offer multiple customer service options, including live chat, in the local language.

German shoppers want to feel confident in your brand, so display trust badges, certifications, and customer reviews to instill trust in potential customers. Professionalism, precision, details, and clear, direct communication all contribute to how your brand will be seen by German shoppers, who generally prefer a more formal tone than Americans are accustomed to. When a German shopper likes your brand content, you'll get a purchase eight out of ten times, and a loyal customer [63%](#) of the time.

Marketplaces are also popular in Germany, so consider introducing your brand through an already well-known [German marketplace](#).

Selling in the EU from the U.K.

There's no doubt that adjusting to Brexit is tricky for both businesses and consumers. More taxes and slower delivery because of extra regulations will likely affect the U.K. market overall, and potentially the British economy. The British pound is [expected to slowly decline](#) over the next several years. But a weaker currency might make goods you're selling out of the U.K. more appealing for international consumers. So with some savvy marketing and adaptation, there could be a paradoxical effect in some ecommerce industries.

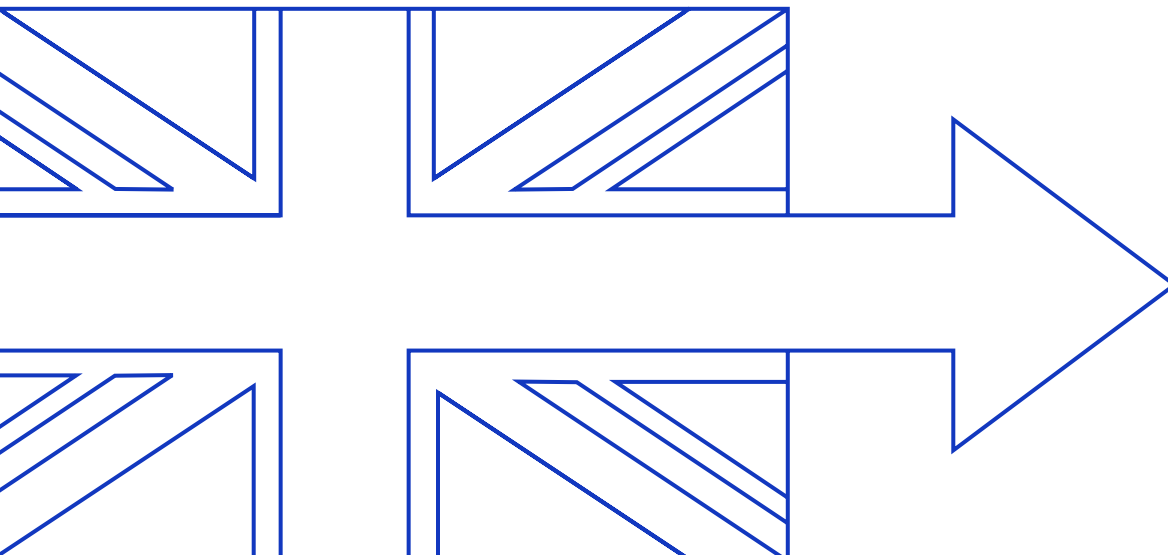
One of the ways U.K. sellers are adapting to the extra time and taxes at U.K. borders is by keeping some [inventory in other parts of Europe](#). Whether this route will be effective for you depends on where most of your deliveries are going, what goods you're selling, and how much inventory you keep on hand. As you consider which inventory items you might relocate, don't forget to factor in the average return rate for each product—import VAT applies to returns and exchanges too.

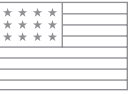
Fortunately, the Brexit deal removed customs fees charged at import for most low-value goods, but your shipments still have to pass through border control which, thanks to the Northern Ireland Protocol, happens at the Irish Sea.

The Northern Ireland Protocol

The border between Northern Ireland and the Republic of Ireland has a long, sometimes violent, history. Having no visible border has helped keep peace between the nations for the [last couple decades](#), but Brexit threatened that peace. If part of the island was an EU member state and the other was not, they would need border control, which would mean drawing a definitive border.

That's where the Northern Ireland Protocol comes in. It preserves the invisible Irish border by keeping Northern Ireland under the EU's market rules while remaining part of the U.K. in every other way. This means that if you're selling from Great Britain, your goods will be checked and controlled before crossing into Northern Ireland.





How to sell in AMER: U.S.

Ecommerce landscape

With revenues that will exceed [\\$563 billion](#) in 2025 from \$469 billion in 2021, the U.S. is the second largest ecommerce market in the world. There are more than [260 million](#) digital buyers in America, which is almost [80%](#) of the population. [Nine percent](#) of Americans made an online purchase for the first time in their lives because of COVID-19, and 37% of online shoppers started buying even more. The ecommerce share of the retail market in 2021 is [15.5%](#) and rising.

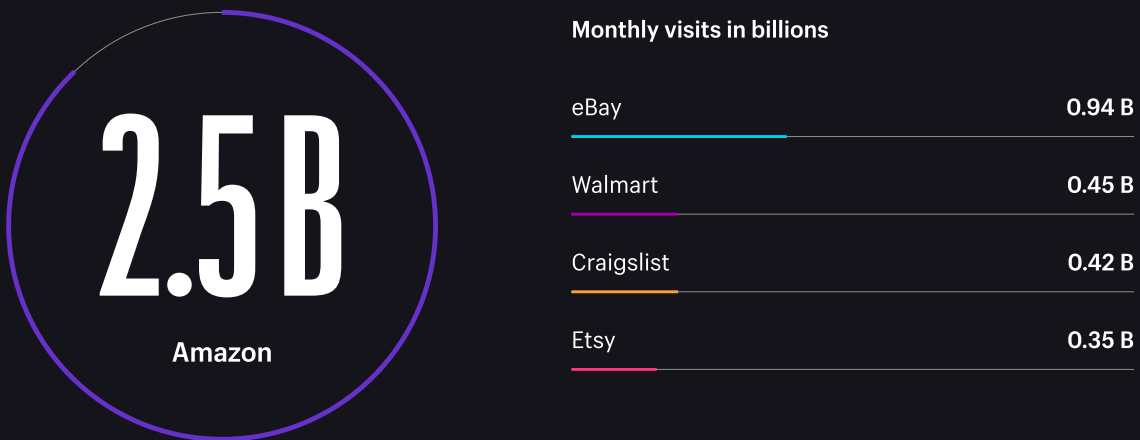
Meet your cross-border markets

Marketplaces

Amazon is the most popular marketplace in America, based on the [2.5 billion](#) visits a month—well over double the runner-up, eBay.

Most popular ecommerce websites in the United States

Estimated traffic volume to the most popular ecommerce websites in the U.S.



Source: similarweb.com

Almost half of all online shopping [starts at Amazon](#), and [80%](#) of Amazon shoppers choose the marketplace for its fast and free shipping. That would be hard to compete with. It's a good thing that many Amazon shoppers use the platform to [discover new brands](#).

Consider listing a few products on Amazon to get extra eyes on your brand. Once customers land on your site, encourage them to shop directly from your online store with perks like loyalty programs and exclusive products.

If you have a Shopify store, you can [list your products on Amazon](#), eBay, or Walmart Marketplace and manage your inventory and orders in one place.

Localization: Culture and marketing

Lead with your brand's purpose

Strong brands have always been value-driven brands, but 2020 particularly underscored the way brands respond to cultural moments. From diversity to sustainability to social justice causes, shoppers want to connect with like-minded brands that make them feel part of something bigger.

Making the world a better place is a priority for more than [80% of millennials](#), and connecting with brands that align with their values can help them feel they are doing just that. According to the [2020 Zeno Strength of Purpose Study](#), consumers are “four to six times more likely to trust, buy, champion, and protect” brands with a strong purpose. The same consumers think 63% of brands do a poor job communicating a clear purpose. How do you become part of the 37%?

Listen to your target market. What do they say is important to them? Assess (or develop) your brand's values and highlight where there's crossover with your target market's values. Then be clear and honest in your communication. Your brand's values should be the through-line across the many faces and channels of your business, not a solitary campaign. Be transparent, be consistent, connect through stories, and earn your customers' trust through authenticity.

Social media has been a force for connecting customers with brands that share their values. In 2020 [51% of consumers in the U.S.](#) said social media advertisements influenced their shopping behavior. If you haven't leveraged social media for your marketing yet, now's the time to consider it.

Up your technology game

[Few online stores](#) use [AR](#) to display their products. Adding AR experiences to your online store before they become widespread will give you an edge that customers will gravitate to:

- [71%](#) of shoppers say they'd shop online more frequently if AR were part of the experience
- 61% of shoppers prefer brands with AR and [57% switched brands](#) to find that preferred customer experience
- 40% of shoppers would pay more to take their products on a virtual test drive

You'll especially appreciate your competitive advantage during America's biggest shopping days: Cyber Monday, Black Friday, and the Christmas shopping season. Make sure your site is ready to process those extra sales through the most popular payment methods in the U.S., which are [credit cards at 38%](#) and e-wallets at 22%, followed by direct debit at 14%.

Rules and regulations

An increasingly important topic in the ecommerce space centers around consumer protection and privacy. Laws like the EU's GDPR are not being written in isolation. [Compare](#) the GDPR mentioned in the section above with the California Consumer Privacy Act (CCPA) implemented in the American state of California around the same time. Like the GDPR, the CCPA provides consumers with these rights:

- Deleting information
- Opting out
- Non-discrimination
- Notice at collection

The CCPA doesn't apply to non-California residents, but the world is moving toward more privacy protection—which means less personalization. Google announced it would throw out its tracking cookies in 2022 and use a group profiling system instead, intending to pave the way toward a “more [privacy-friendly web](#).”

Fulfillment

More than [60%](#) of online shoppers want their purchases shipped to them in three days or less, and shoppers are more likely to make a purchase if shipping is free. Outsourcing fulfillment might make it easier to meet your customers' expectations.

Third-party logistics providers are well established in the U.S., with several options to choose from. Some are full service, offering you storage and restock recommendations, branded options, and same-day fulfillment. Get an idea of what a full-service 3PL might look like in [this short video](#) about the Shopify Fulfillment Network. If you have a Shopify store, you can use the fulfillment app to avoid the complex technical integrations that most 3PLs require. If you sell through your own site and a marketplace, you might consider the 3PLs that also offer [multi-channel integration](#).



Global business spotlight: Vaoala Vanilla

Defining an international brand

Two lockdowns in less than two years in a water-locked nation. International shipping costs worth more than the products are sold for. Payment providers like PayPal unavailable here. This is the environment in which Shelley Burich, founder and owner of Vaoala Vanilla, took her Samoan vanilla business global.

Vaoala Vanilla grows, processes, and packages all its products in Samoa, but for the business to grow, it had to reach outside its local population of fewer than 200,000 people. With freight out of the country costing more than the products themselves, a measles outbreak closing Samoan borders in 2019, and COVID continuing the closure in 2020, tapping into the international market seemed impossible.

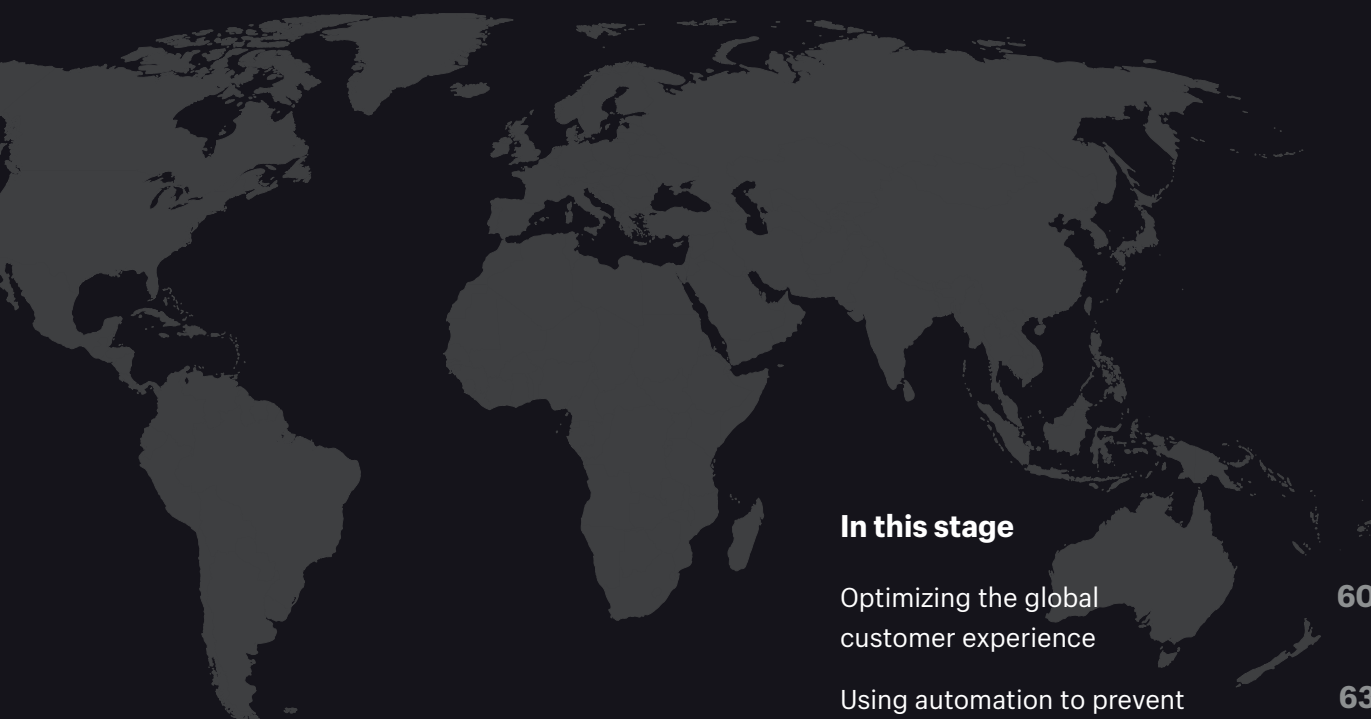
In 2020 Burich participated in an entrepreneurship program through [Shopify Indigenous Hub](#) with [Rise2025](#), which inspired her to reframe her brand and make that frame bigger.

Vaoala Vanilla opened international bank accounts and began partnering with distributors in ANZ, enabling it to ship to these countries in higher volumes.

Fulfillment networks helped to reduce shipping costs, but shipping was still too expensive. How could Vaoala Vanilla get customers to pay so much for shipping? The answer was in the branding: Vaoala Vanilla now markets itself as a premium, boutique, organic brand. Elevating Vaoala Vanilla's brand enabled Burich to also elevate product prices enough to cover shipping costs. International customers like those in Canada and Ireland now pay for the value of the [Vaoala Vanilla story](#).

Stage 4

Scale your global business



In this stage

Optimizing the global customer experience **60**

Using automation to prevent fraud, boost efficiency, and accelerate growth **63**

Scale your global business

Optimizing the global customer experience

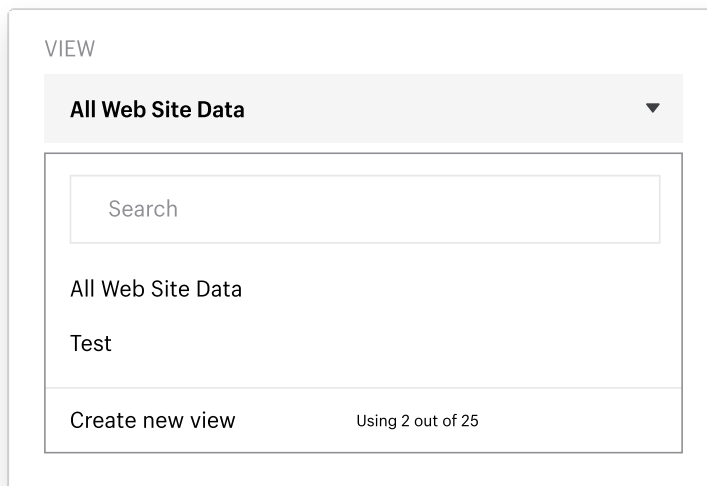
To offer a compelling global customer experience at scale, you need advanced data management practices. When managed and mined properly, data can help you optimize international online stores, increase sales and margins, and [personalize marketing initiatives](#).

Multi-store data management

Manage reports across stores to gain a holistic view of your performance. Tools like [Glew](#) and [Grow](#) combine data across your stores in one place, so you can monitor and identify trends and issues. You can also monitor information about products, orders, and shipping to measure metrics like customer lifetime value, acquisition costs, and net profit.

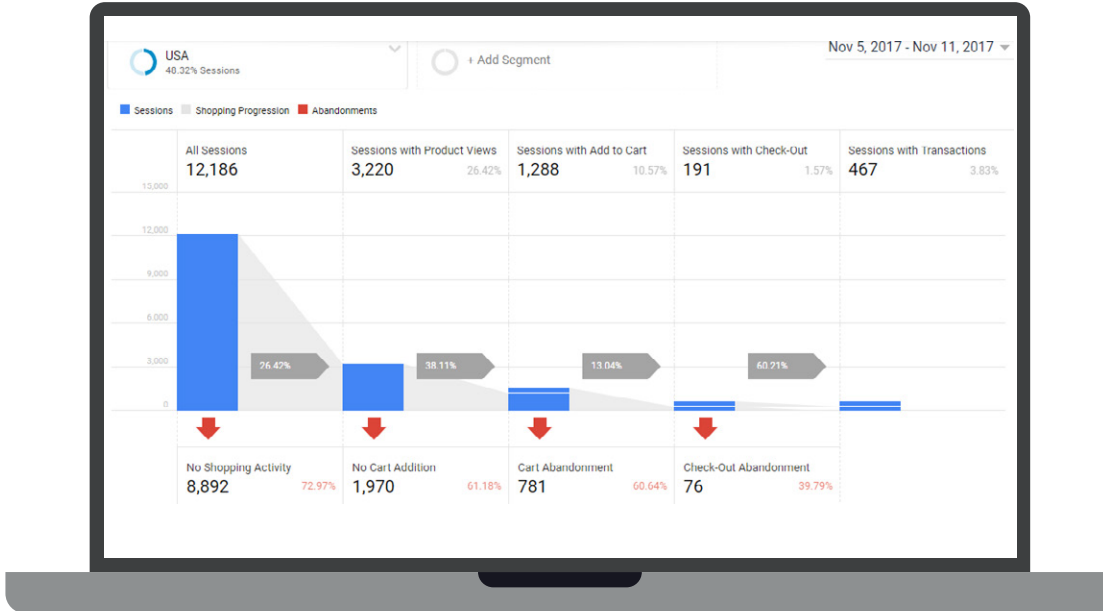
Simplify your data across multiple stores with these changes to your Google Analytics:

- To view the conversion-funnel report by country, add a [new view](#) of every relevant country and/or language



By creating views, you'll be able to segment the conversion-funnel report according to country without having to use the Advanced Segments feature.

- Segment your funnel and analyze behaviors with [Enhanced Ecommerce](#)



By analyzing shopping behavior segmented by language or location, uncover what's preventing your international visitors from completing their purchases. Use the data to inform future user-experience and design decisions.

International reverse logistics

You're not alone if you feel unprepared to handle returns on a global scale. Customers return their online purchases [three times more](#) than their in-store purchases, and most consumers expect their returns to be handled within [three to five days](#). Implementing reverse logistics can slash labor and packaging costs, while significantly improving customer satisfaction scores.

Efficient reverse-logistics processes include routing cross-border returns to the appropriate warehouse or 3PL, executing refunds in multiple currencies, and adjusting inventory. Setting up a [reverse supply chain](#) can help you establish new product lines and secondary markets worth tens of millions in annual sales.

Global customer support

Expanding internationally means offering support to customers across different time zones, languages, and channels. Multiple support options are the foundation of good customer service for a global brand. Apart from intuitive channels like an FAQ page; dedicated pages for shipping, returns, and deliveries; and social media, consider offering the following:

Live chat

You need native-language functionality if you're operating stores in foreign languages. [Seventy-two percent](#) of customers are more likely to buy from your brand if you can respond to their questions in their own language. But using a [multilingual chat service](#) with non-native speakers relying on translation tools can slow the process and diminish customer satisfaction.

Customer support solutions

Tools like [Gorgias](#) and [Zendesk](#) are customer-service platforms that let you set up customer [support for multiple languages](#). They can help you automate and scale international customer support.

Advanced multi-language techniques

The form fields in your localized sites should match the standard format for each country. It's a common mistake to provide fields that are too short for international addresses or, worse, fail to accept international addresses altogether. In some countries it's more appropriate to ask for a family name or surname instead of a last name. Italy and Mexico place the house number after the street name. Most streets in Japan don't have names, so you need to [include the block number](#).

In many countries people read left to right. Although the [F-pattern](#) of scanning a website has been universally observed, design decisions should keep in mind other reading patterns. Shoppers in your target market might read right to left, like many Arab online shoppers. As a result, they scan web pages in a [mirrored F-pattern](#).

[Localization](#) also means translating dimensions and apparel sizing charts. For example, if you sell women's shoes, size 8 in the U.K. is size 42 in Europe and 26.5 in Japan.

Consider also using local accents in your ads and replacing your hero and product images with models from your target country. Include local climate, religion, and cultural trends in your translation activities too.

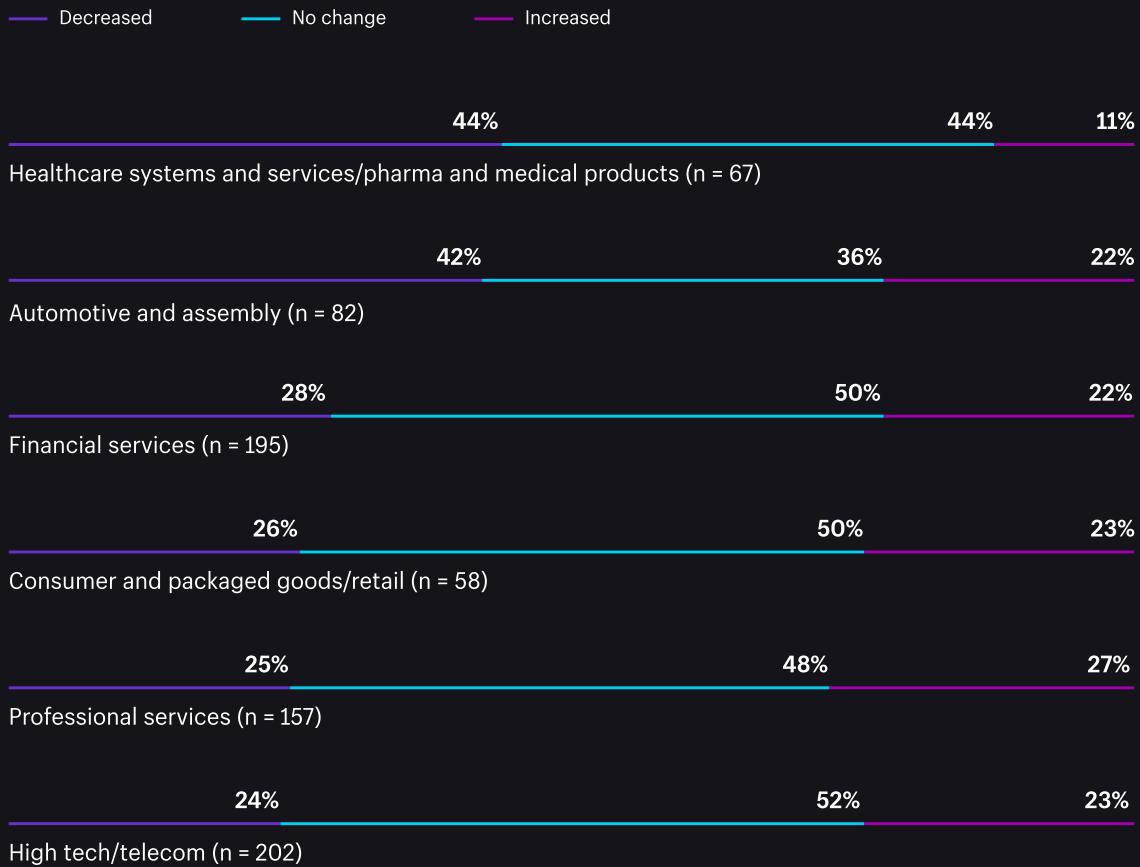
Using automation to prevent fraud, boost efficiency, and accelerate growth

The complexity associated with scaling globally compounds with each market you enter. To scale faster with fewer resources, large businesses are turning to automation.

Supply-chain automation

Automating your inventory and supply chain are keys to scaling globally. So it's not surprising that worldwide spending on process automation is expected to top [\\$83 billion](#) by the end of 2021.

Change in artificial intelligence (AI) investment levels in organizations worldwide due to the COVID-19 pandemic 2020, by industry



Scale your global business

Worldwide: June 9 to June 19, 2020; representing the full range of regions and industries
Source: McKinsey © Statista 2021

Marketing automation

Cross-channel campaign management is increasingly difficult as you expand into new regions and countries. Centralizing and automating campaigns can help enterprises execute across borders at scale.

Marketing automation infused with AI can help you predict and prevent customer churn, personalize cross-channel customer engagement, and drive billions of dollars in additional revenue.

Ecommerce automation

Through automation, you can save time and money while offering best-in-class shopping experiences across regions.

Set-it-and-forget-it workflows based on relevant triggers, conditions, and actions simplify processes, reduce the risk of human error, and free you to operate globally with fewer internal resources, which means easier international entry and growth. Here's what these tools help you do:

- Schedule changes to your online store for major events
- Reverse those changes automatically
- List new products on multiple channels
- Tag and segment customers for retention
- Streamline tracking and reporting
- Identify and cancel high-risk orders
- Send inventory alerts for reordering and marketing
- Standardize merchandising for discoverability
- Integrate third-party tools and apps

Ecommerce automation is also preventing one of the biggest risks in international trade: fraud. Unfortunately, the increase in online sales brought to us by 2020's pandemic also [increased the instances of fraud](#).

Detecting fraud is the first step. The real value of ecommerce automation is stopping fraud from happening right after it's detected.

See you around the world

Expanding globally can be one of the most frustrating yet rewarding endeavors of your business journey. Refer to this playbook as you enter each new phase of international expansion. Use it to avoid costly mistakes. Let it guide your decision making.

Time, technology, and trade change quickly. Like you, Shopify Plus is at the forefront of global expansion. We'll keep this playbook up to date so you're always on the cutting edge of cross-border commerce.

Safe journey, and see you around the world!

**Ready to start selling globally on Shopify?
Talk to one of our global commerce experts today.**

Let's talk

See you around the world

