
asendia
Beyond Borders
Bridging Customer Experience Ambition and Execution
THE WORLD IS YOUR ADDRESS
www.asendia.com

Executive summary

Despite ongoing trade tensions and extreme supply chain disruption, cross-border e-commerce continues to expand as retailers pursue growth opportunities in new markets. Ambitions remain strong with 75% of retailers confident about expanding international sales in 2026, up from 72% in 2025.

However, a troubling execution gap threatens to undermine this optimism.

Our survey found that, across all markets surveyed, retailers report on average 29% of their international deliveries fail to meet customer expectations. This shortfall defines the challenge facing global retailers today: the risk of disappointing hard-won customers in new territories has never been higher. Reasons range from border delays and tariff complexity, to inconsistent carrier performance and customer communications problems.

Despite challenges, our research of 1,013 e-commerce professionals across the UK, USA, Europe and APAC uncovers encouraging trends. Retailers are responding with significant investment - 82% plan to increase customer experience (CX) budgets by 11% or more in 2026. They're deploying AI-powered solutions, diversifying delivery methods and streamlining customs processes to bridge the execution gap.

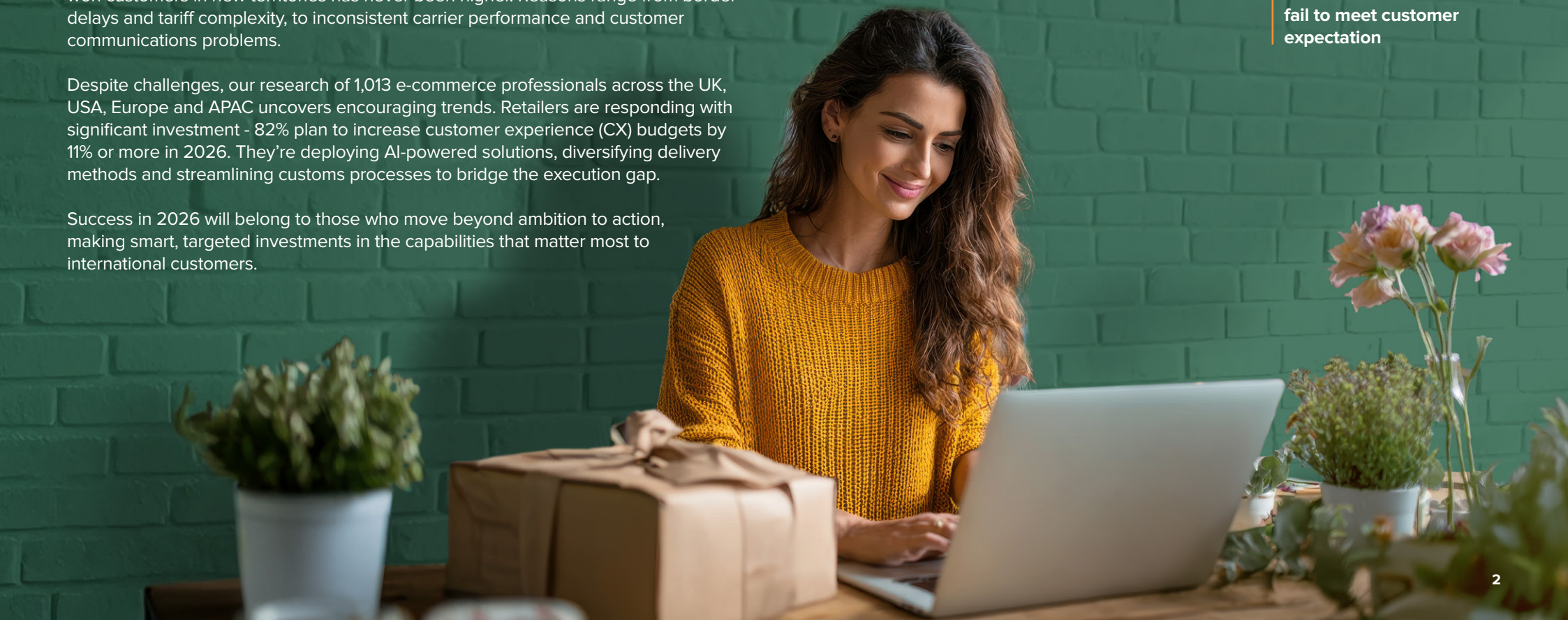
Success in 2026 will belong to those who move beyond ambition to action, making smart, targeted investments in the capabilities that matter most to international customers.

75%

of retailers confident about expanding international sales in 2026

29%

of international deliveries fail to meet customer expectation



Strong ambitions meet harsh realities

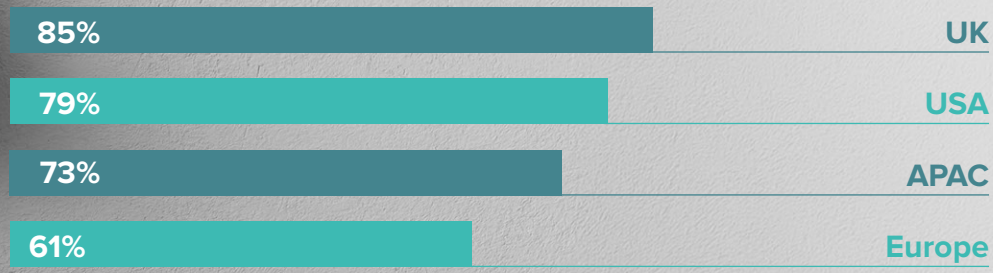
Three-quarters of retailers (75%) express confidence in their ability to grow cross-border sales in 2026, marking a steady rise from 72% in 2025 (Beyond Borders 2025 Report).



However, regional confidence varies significantly, with UK retailers leading at 85%, followed by the USA at 79%, APAC at 73% and Europe at 61%. When we look at the different sectors, Department Stores/General Merchandise retailers are the most confident of growing international sales (80% expecting to), followed by Entertainment retailers (78%) and Health & Beauty retailers (77%). Three-quarters (75%) of Fashion retailers expect growth, while two thirds (66%) of Sports and Leisure retailers do. Yet this optimism exists alongside a stark delivery performance gap. On average, 29% of international deliveries fail to meet customer expectations - a figure that climbs to 31% in the USA and 30% in APAC.

This situation creates urgency. If confident retailers expand into new territories without addressing fundamental CX challenges, they risk multiplying their problems rather than their revenues.

How confident, are you about your company's ability to successfully grow in cross-border markets in 2026?



International parcel delivery CX failure rate by region



Where international parcel shipping breaks down

What exactly in the cross-border shipping process is costing retailers customers and revenue? When we asked retailers to identify their greatest friction points in international parcel shipping, five challenges emerged as critical:

Border delays and customs clearance — 32%

The number one friction point globally, particularly acute in the UK (33%) and USA (34%), and for Home & DIY retailers (42%)

Inconsistent carrier performance across regions — 30%

Most problematic in Europe (31%), where fragmented networks create reliability issues. The number one friction point for Sport & Leisure retailers (38%) and Fashion retailers (36%)

International delivery costs — 29%

The top concern in APAC (34%), where price sensitivity remains high, and acutely felt by Entertainment retailers (33%) and Marketplace sellers (37%)

Tariff and duty calculations and compliance — 29%

A major headache in the USA (34%) and Europe (29%), and specifically for Health & Beauty retailers (33%)

Handling returns across borders — 29%

APAC has the biggest problem with 32% citing returns, compared to just 24% of European respondents. A third (33%) of Home and DIY retailers say this causes CX friction

The data revealed that these challenges are interconnected. Border delays trigger tracking visibility issues. Inconsistent carrier performance complicates returns. Tariff complications lead to unexpected costs that damage customer trust.

Beauty's dangerous goods problem

Uniquely for Health & Beauty retailers, the biggest friction point cited is 'the complexity of delivery of dangerous goods', with over a third (37%) selecting this. It's a significant jump from the 23% cross-sector average. Many Health & Beauty products contain alcohol-based, aerosol, or other flammable ingredients, which means they are classified as dangerous goods for air transport and require additional documentation, packaging standards, and carrier restrictions when shipping internationally.



The cost of ‘Where Is My Order?’

WISMO queries represent one of the most visible symptoms of poor international CX - and one of the most expensive to manage. Retailers are responding with a decisive shift towards proactive communication and automation.

The top strategies retailers are deploying to address WISMO costs (when asked to select all that apply):

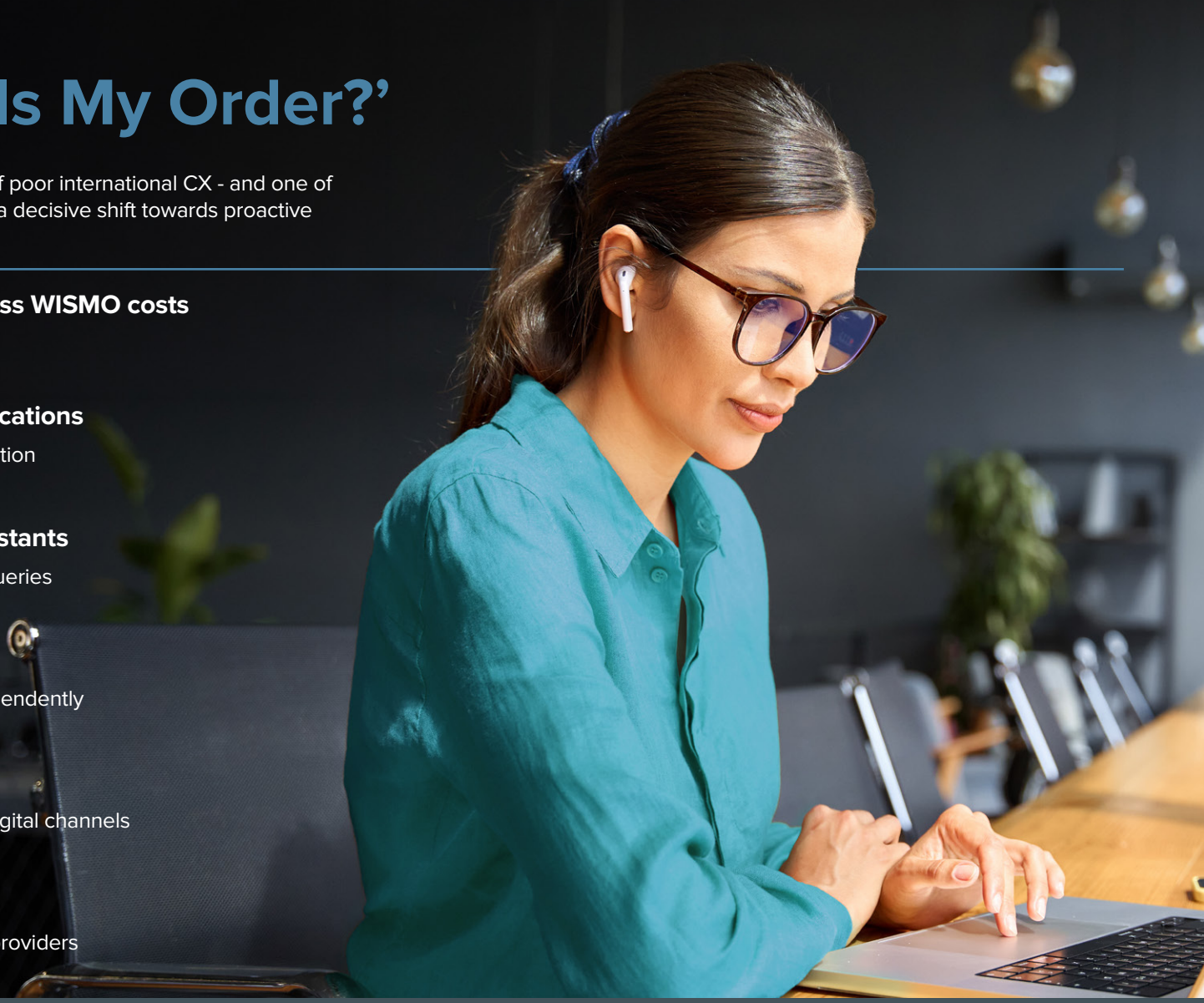
51% **Real-time delivery updates and notifications**
Moving from reactive to proactive communication

51% **AI-powered chatbots and virtual assistants**
Automating responses to common tracking queries

48% **Self-service tracking portals**
Empowering customers to find answers independently

47% **Reducing live agent capacity**
Responding to cost pressures by shifting to digital channels

43% **Outsourcing call centre operations**
Consolidating customer service to specialist providers



The trend is clear: retailers are investing in technology to prevent WISMO queries before they happen, rather than hiring more agents to handle them after the fact.

However, this approach only works if the underlying delivery performance improves. Proactive notifications about delays don’t solve the delay itself. AI chatbots can’t magic a lost parcel into existence.

The retailers seeing the greatest success combine proactive technology with fundamental improvements to their delivery networks and carrier partnerships.

Beyond home delivery: the rise of flexible fulfilment

Modern international e-commerce customers expect choice in how they receive their shopping orders. Retailers are responding by expanding their delivery method portfolios, moving beyond traditional home delivery to embrace convenience-focused alternatives, even when shipping parcels into international territories.

The delivery methods retailers are prioritising:

Out-of-home collection points

40%	Click and collect from own stores/warehouses
38%	Parcel shops and collection points
36%	Click and collect at retail partners
34%	Out-of-home parcel lockers

Fast and convenient overseas deliveries

34%	Scheduled delivery time
37%	Weekend and evening delivery options
39%	Same-day and ultra-fast delivery services

This diversification serves multiple purposes. Click and collect options reduce failed delivery attempts. Parcel shops and lockers provide secure alternatives in markets where home delivery is unreliable. Same-day services meet the expectations of customers accustomed to domestic speed.



Manuel Bonnin,
Head of Marketing Innovation & CX

"Multiple delivery options mean fewer failed attempts, lower redelivery costs and better customer satisfaction. It's a win across the board."

Returns: from cost centre to competitive advantage

Strategic approaches to international returns management

Returns represent one of the most complex and costly aspects of cross-border e-commerce. Retailers are responding with sophisticated strategies that balance customer expectations with operational efficiency.

The returns strategies retailers are implementing for 2026 (when asked to select all that apply):

39%	Introducing return fees for international orders
39%	Using AI to predict and prevent returns
39%	Establishing local return centres in key markets
38%	Implementing 'returnless refunds' for low-value items
36%	Partnering with third-party returns specialists
35%	Offering store credit instead of refunds
34%	Expanding return windows

The data reveals a dual approach: prevention and optimisation. AI-powered returns prediction helps retailers identify high-risk orders before they ship, enabling proactive interventions. Returnless refunds eliminate the cost of reverse logistics for items where the return shipping exceeds the product value.

Regional approaches vary. APAC retailers lead in AI adoption for returns prevention (42%). European retailers focus on local return centres to manage cross-border complexity. USA retailers are most likely to implement return fees to offset costs (46%).

Local return centres represent a significant investment but deliver multiple benefits: faster refunds, lower shipping costs, potential for refurbishment and resale in local markets, and improved customer satisfaction.



Helen Scurfield,
CEO of Asendia Global Returns

"Fair return fees, transparent policies and fast refunds build trust. Combined with AI to reduce unnecessary returns, this creates a more sustainable model for the future."



Investment trends: putting money where the problems are

How retailers are allocating CX budgets in 2026? Our survey found that retailers are backing their growth ambitions with significant investment. An impressive 82% plan to increase their CX budgets by 11% or more in 2026, with the average planned increase sitting at 22%.



The key question is not whether retailers are investing, but whether they're investing wisely. Our research suggests the highest ROI comes from:

- **Technology that prevents problems**
  (AI for returns prediction, automated customs documentation)
- **Infrastructure that improves reliability**
  (local return centres, diversified carrier networks)
- **Communication tools that reduce support costs**
  (proactive tracking, self-service portals)

The investment distribution reveals strong commitment:

11-25% increase:	**34%**	of retailers
26-50% increase:	**25%**	of retailers
1-10% increase:	**15%**	of retailers
More than 50% increase:	**3%**	of retailers
No increase:	**Less than 1%**	of retailers



Domenico Pereira,
Chief Marketing Officer, Asendia

"Investment alone won't close the CX execution gap. The danger for retailers is to plough capital into untested technologies whilst ignoring fundamental operational issues. The winners are those who invest strategically in the capabilities that directly address their biggest friction points."

Regional insights: one size does not fit all

Understanding the nuances across UK, USA, Europe and APAC

Whilst global trends provide valuable context, successful international expansion requires understanding regional differences in challenges, priorities and customer expectations.

% confident of international e-commerce growth



- 28% Customer Experience failure rate
- 23% Investment increase in CX
- Top friction points: Border delays, deliver costs, tracking visibility
- Strong focus on diversified delivery methods
- Post-Brexit customs complexity remains a challenge
- Highest confidence of any region

- 31% Customer Experience failure rate
- 23% Investment increase in CX
- Top friction points: Customer communications, border delays, tariff compliance
- Returns management a major focus area
- Leading adoption of return fees and AI prevention

- 30% Customer Experience failure rate
- 24% Investment increase in CX
- Top friction points: Delivery costs, border delays, returns handling
- Leading AI adoption across all categories
- Rapid growth creating scaling challenges

- 27% Customer Experience failure rate
- 20% Investment increase in CX
- Top friction points: Carrier inconsistency, tariff compliance, border delays
- Fragmented market creates complexity
- Strong interest in local return centres
- Lowest confidence despite mature e-commerce markets

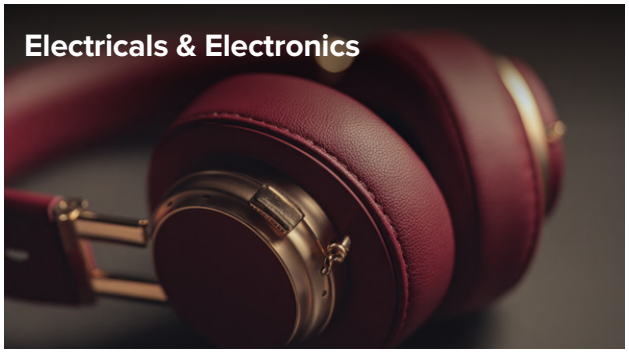
Sector stories

Cross-border challenges and priorities vary significantly by sector. Fashion & Apparel, Electronics and Health & Beauty each face distinct obstacles and will need to use unique strategies to deliver exceptional international customer experiences.



Fashion retailers navigate the highest customs complexity while investing in social commerce, but cost pressures are forcing service model changes.

- **Social commerce focus:**
  91% leveraging social platforms for cross-border sales (compared to 88% average across all sectors)
- **Customs bottleneck:**
  54% streamlining customs, duties and compliance to avoid delays - the sector's biggest cross-border pain point.
- **Service cost crunch:**
  51% reducing live agent capacity due to cost pressures, shifting towards automated customer service solutions.



Social commerce and automation lead the charge as electrical retailers balance premium service expectations with operational efficiency in cross-border markets.

- **Social commerce surge:**
  Leveraging social platforms for cross-border sales, reflecting the shift towards Instagram and TikTok as key international channels.
- **Inventory intelligence:**
  59% prioritising improved international inventory and fulfilment management to meet fast delivery expectations whilst controlling costs.
- **Self-service CX:**
  54% using real-time delivery updates and expanding tracking portals to reduce "where's my parcel?" enquiries and cut service costs.



The most social commerce-savvy sector faces pressure to automate customer service while maintaining the premium, personalised experience beauty customers expect.

- **Social commerce dominance:**
  Leveraging social platforms - the highest of any sector- reflecting beauty's influencer-driven, visual nature.
- **Cost-driven automation:**
  56% reducing live agent capacity and implementing real-time delivery updates to manage service costs.
- **Tracking transparency:**
  54% prioritising better parcel tracking and customer communication to reduce post-purchase anxiety and enquiries.

Conclusion

Closing the gap between ambition and execution

The research reveals a clear picture: retailers are ambitious about international growth, confident in their prospects and willing to invest significantly in customer experience. Yet nearly three in ten international deliveries still fail to meet customer expectations.

This gap between ambition and execution represents the defining challenge - and opportunity - for cross-border e-commerce in 2026.

The opportunity is substantial. International e-commerce continues to grow, customers are increasingly comfortable buying across borders and technology is making complex logistics more manageable. The retailers who close the execution gap will capture disproportionate value.

About this research

This report is based on a survey of 1,013 e-commerce professionals conducted in late 2025/early 2026. Respondents included senior decision-makers from retail businesses engaged in cross-border e-commerce across four regions: UK (n=259), USA (n=250), Europe (n=251) and APAC (n=253).



The retailers who will succeed are those who:

Invest strategically, not broadly

Don't simply follow the crowd. Identify your specific friction points and invest in solutions that address them directly. If customs is your challenge, partner with specialists. If carrier inconsistency plagues you, diversify your network. If WISMO queries drain resources, implement proactive tracking.

Think local, act global

Regional differences matter. A one-size-fits-all approach will fail. Combine global best practices with local execution, whether that's understanding APAC price sensitivity, navigating European fragmentation, managing USA returns complexity or addressing UK post-Brexit customs challenges.

Prioritise prevention over reaction

AI that predicts returns before they happen delivers better ROI than expanding call centres to handle complaints. Proactive delivery notifications prevent WISMO queries more effectively than chatbots that answer them. Reliable carriers eliminate problems that technology can only paper over.

Measure what matters

Track not just confidence and investment levels, but delivery success rates, WISMO query volumes, returns percentages and customer satisfaction scores. The gap between ambition and execution only closes when you measure both sides of the equation.

The world remains your address

- but only if you can deliver on that promise.

Global expertise.
Local understanding.
Designed for you.

asendia

At Asendia, we don't just deliver parcels - we connect brands and shoppers through intelligent, flexible logistics solutions built on experience, technology, and care.

Our philosophy, **smart-design** by asendia®, brings together our people, technology and network to create solutions that work across borders and evolve with every customer's needs.

About Asendia

Asendia is a joint venture between La Poste and Swiss Post, delivering international e-commerce and mail solutions to over 200 destinations worldwide. Our e-PAQ range provides retailers with trusted, cost-effective shipping options, whilst our expertise in customs, returns and last-mile delivery helps businesses deliver exceptional customer experiences across borders.

For more information, visit:

www.asendia.com

THE WORLD IS YOUR ADDRESS