

Carts & Culture:

A Data-Driven Guide
for DTC Brands
Expanding into the
EU Market



Introduction

Global e-commerce growth continues to reshape consumer behavior and market strategies. For brands operating primarily in the U.S., Europe presents an attractive, and often underleveraged, opportunity.

Why Expand to Europe?

- Less saturation in high-potential verticals like:
 - Sustainable fashion
 - Outdoor gear
 - DIY and gardening tools
- European consumers show **stronger brand loyalty**, especially toward values-driven companies:



- **45%** prefer eco-conscious brands vs. **32%** in the U.S.

By understanding regional nuances—cultural, logistical, and behavioral—brands can approach European expansion with the precision and preparation required for long-term success.

This whitepaper helps U.S.-focused direct-to-consumer (DTC) brands navigate the European e-commerce landscape, offering data-driven insights to support strategic expansion.



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Key Insight

- U.S. consumers prioritize **home-centric convenience**, while European buyers favor **outdoor lifestyles, fashion, and sustainable products**.
- The EU e-commerce market was valued at **€717 billion in 2023** (Statista).
- **63%** of European consumers shop **cross-border** (Ecommerce Europe).
- Higher average order value (AOV):

Germany: **€120** U.S.: **~\$90**

These figures reflect not only market potential but also growing openness to international brands.

To succeed in Europe, DTC brands must tailor their **product selection, marketing approach, and fulfillment strategy** to regional preferences and infrastructure.



E-Commerce in the U.S.: Home & Convenience Dominates

Key Product Categories (U.S. Best-Sellers)

Category	% of Online Sales	Growth (YoY)
Furniture & Home Decor	18%	0.12
Electronics	22%	0.08
Grocery & Pantry	15%	0.25
Health & Personal Care	12%	0.1

Consumer Behavior Insights

- Suburban Lifestyle: 60% of U.S. shoppers live in suburbs (Pew Research).
- Amazon Dominance: 38% of all U.S. e-commerce sales (eMarketer).
- Fast Shipping Expectation: 56% abandon carts if delivery exceeds 3 days (Barram Institute).



E-Commerce in Europe: Activity, Style & Sustainability

Key Product Categories (EU Best-Sellers)

Category	% of Online Sales	Top Markets
Fashion & Apparel	28%	UK, Germany, France
Sports & Outdoor	15%	Sweden, Germany
DIY & Gardening	12%	Netherlands, Germany
Health & Beauty	10%	France, Italy

Consumer Behavior Insights

- Urban Living: 75% of Europeans live in cities (World Bank) → smaller homes, less furniture demand.
- Sustainability Matters: 64% prefer brands with eco-friendly packaging (EU Commission).



Category-Level Comparison: U.S. vs. EU

Top Categories by Region

Rank	United States	Europe
1	Electronics	Fashion & Apparel
2	Furniture & Home	Sports & Outdoor
3	Grocery	DIY & Gardening
4	Health & Personal Care	Health & Beauty

Key Differences

- Fashion: EU shoppers buy 3x more apparel online than U.S. buyers.
- Electronics: U.S. leads in tech purchases (22% vs. EU's 15%).
- Outdoor Gear: EU demand is 40% higher due to active lifestyles.



Cultural & Environmental Influences

Factor	U.S.	Europe
Living Space	Larger homes (2,300 sq ft)	Smaller apartments (900 sq ft)
Delivery Expectations	2-3 days standard	3-5 days accepted
Sustainability	Growing concern (32%)	High priority (64%)
Top Platforms	Amazon, Walmart	Zalando, Allegro



How DTC Brands Can Succeed in Europe

Product & Marketing Adjustments

- Focus on: Sustainable packaging, localized sizing (EU uses metric), and outdoor/urban lifestyle products.
- Avoid: Oversized home goods (limited space in EU).

Platform Strategy

7 European marketplaces: Where to grow and succeed in e-commerce in 2025:

The Amazon logo, featuring the word "amazon" in a bold, black, sans-serif font with a curved orange arrow underneath it.

Regions: Italy, France, Germany, UK

Demographics: Primarily millennials

Top Products: Electronics, fashion, home goods, games

The eBay logo, featuring the word "ebay" in a lowercase, sans-serif font with each letter in a different color: 'e' is red, 'b' is blue, 'a' is yellow, and 'y' is green.

Regions: Italy, France, Germany, UK

Demographics: Primarily millennials

Top Products: Electronics, fashion, home goods, games

The Allegro logo, featuring the word "allegro" in a bold, lowercase, sans-serif font in a dark orange color.

Regions: Poland, Czech Republic, Slovakia, Hungary

Demographics: Central and Eastern European value-conscious shoppers

Top Products: Home & garden, kids' products, electronics, seasonal items

The logo for Cdiscount, featuring the word "Cdiscount" in a white, stylized font on a blue rectangular background.

Regions: France, Germany, Belgium, Italy

Demographics: Budget-conscious French and neighboring EU shoppers

Top Products: Electronics, appliances, furniture, fashion, beauty

The logo for Zalando, consisting of an orange triangle pointing right followed by the word "zalando" in a black, lowercase, sans-serif font.

Regions: Germany, Switzerland, France

Demographics: Gen Z and millennials

Top Products: Fashion, footwear, accessories, luxury lifestyle items

The logo for Temu, featuring four white icons (a dress, a shoe, a handbag, and a shopping bag) above the word "TEMU" in a white, bold, sans-serif font, all on an orange square background.

Regions: Germany, France, Italy

Demographics: Young, budget-conscious consumers

Top Products: Fashion, electronics, home decor, fitness

The logo for Bol, featuring the word "bol." in a bold, blue, lowercase, sans-serif font.

Regions: Netherlands, Belgium

Demographics: Dutch-speaking, convenience-oriented shoppers

Top Products: Fashion, hobby & leisure, electronics

Apparel Fulfillment

The apparel industry stands apart due to its fast pace, high turnover, and large SKU volumes. To meet customer expectations, order processing must be efficient, accurate, and highly adaptable.

Key Challenges in Apparel Fulfillment:

- **Seasonal Fluctuations & Short Product Lifecycles**

Rapid shifts in fashion trends and seasonal demand require flexible inventory strategies to avoid overstock or stockouts

- **High SKU Volume**

Managing a wide variety of sizes, styles, and colors demands organized, scalable storage and tracking systems.

- **Returns Management**

High return rates—especially post-holiday—necessitate efficient return processes to maintain customer satisfaction and inventory accuracy.

- **Order & Preference Changes**

Last-minute changes in online orders are common. A responsive system is essential to ensure quick adjustments and a smooth customer experience.

- **Branding & Unboxing**

Customers buy with their eyes—especially in the age of social media. Customized packaging shapes customer perception, making branded fulfillment a key differentiation.

These operational pressures demand speed, flexibility, and precision. That's why partnering with a specialized 3PL is not just helpful—it's strategic.

NextSmartShip, the Right Partner for your EU Expansion

Our end-to-end fulfillment infrastructure accelerates delivery timelines, optimizes costs, and enables seamless market penetration across the EU.

What We Offer

- **Tailor-Made Fulfillment Solutions**

Our flexible services are designed to grow with your brand. Whether you're launching in one country or scaling across the entire EU, we've got you covered—without the operational overhead.

- **Faster, More Affordable Shipping**

By storing your inventory in our strategically located warehouses in the **UK, Germany or Poland**, you can offer **2-day shipping** across the EU and significantly reduce shipping costs.

- **Multi-Platform Integration**

Seamlessly connect your online store to our system with one click. Sync orders, inventory, shipping status, and tracking numbers in real time—no manual work required.

- **Dedicated European Customer Support**

Our Europe-based customer service team is available 24/7 to support your business and your EU customers, ensuring every issue is handled by experts in the European market.

Comprehensive End-to-End Fulfillment Services



Free Warehousing



Item Inspection



Pick & Pack



Kitting & Assembly



Labeling



Custom Packaging



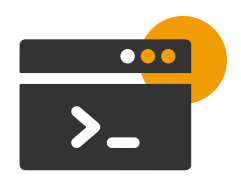
Inventory Management



Global Shipping



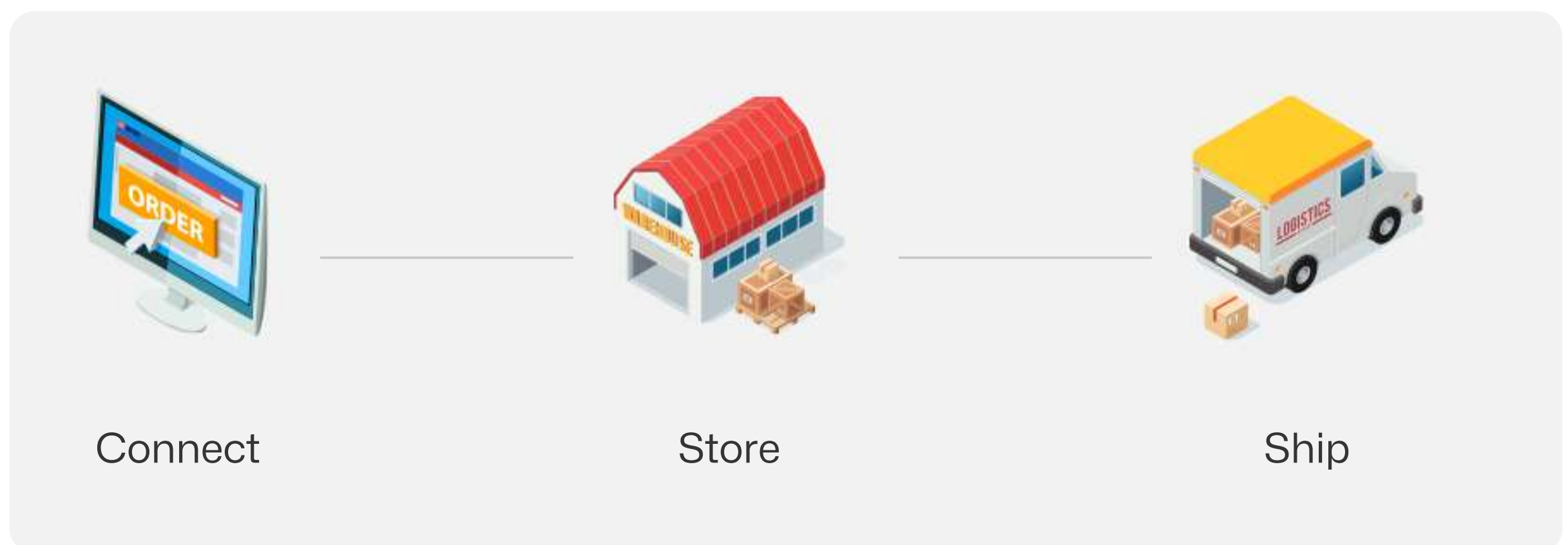
1-to-1 representative



Free Software

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Operational Workflow



Conclusion

By understanding regional cultural, logistical, and behavioral differences, brands can enter the European market with clarity and confidence.

Partnering with a 3PL like NextSmartShip provides the infrastructure and local expertise needed to simplify expansion while maintaining a consistent, high-quality brand experience.

THANK YOU