

2026 EU Tariffs Sentiment & Impact Study

2026.9



Executive Summary

Research Background

Cross-border e-commerce has become an integral part of European consumption, driven by consumer needs for value, choice and access—not price alone.

Europe's evolving regulatory landscape is reshaping cross-border e-commerce, forcing platforms and merchants to adapt—with the impact ultimately reaching consumers

Examples include the €3 flat duty already in effect and the upcoming €2 handling fee, adding further cost and complexity to cross-border trade

NIQ

KleinS GmbH commissioned NIQ to conduct a large-scale study among 2,501 EU cross-border e-commerce consumers to assess the real-life impact of these changes and understand consumers' views on both current and future developments

Key Findings

What starts as higher costs for cross-border purchases is increasingly **translating into broader pressure on household finances and everyday living**—disproportionately affecting lower-income consumers

Cross-border e-commerce spending has risen by up to 22%, while monthly living expenses have increased by around 23%

The impact is particularly pronounced among lower-income households, whose average living expenses have increased by 29%, squeezing essential spending on healthcare, food, clothing & footwear, and in some cases education

Despite growing friction in the shopping experience, European consumers remain **highly reliant on cross-border e-commerce**—yet are spending significantly more time navigating and evaluating their choices

73% of consumers report spending more time comparing and choosing products

Only 8% of consumers considering a switch to local e-commerce platforms or physical stores

Consumer resistance is already emerging as cross-border e-commerce costs rise, with **opposition** extending from **current fees to further increases yet to come**

51% dissatisfied with the current €3 flat duty; 55% oppose further fee increases ahead of the November 2026 handling fee

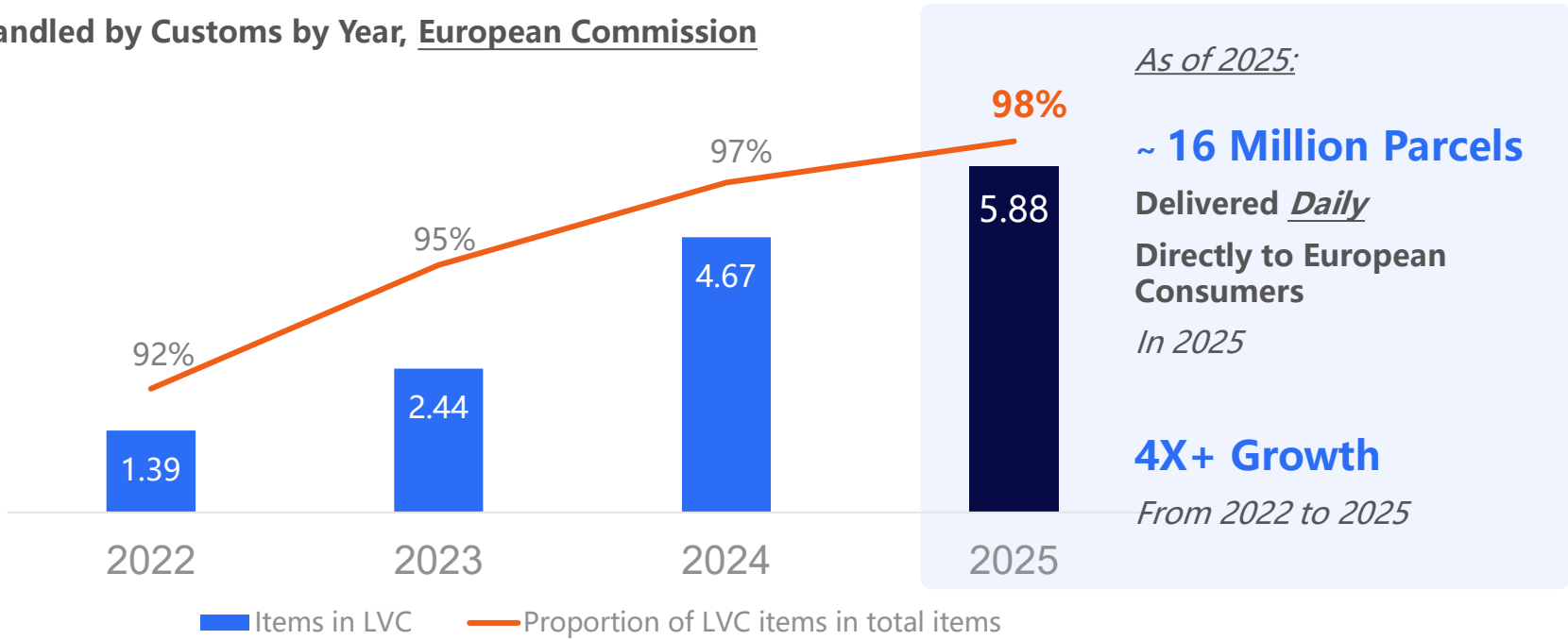
5.88 Billion Small Parcels Entered the EU in 2025 — A 4X Surge in Three Years, Backed by Major European Logistics Investment

Low-Value Imports Has Become the Most Significant Forms to European Consumers, in terms of Volume

Around **5.88 Billion LVCs**(*Low Value Consignments, small packages of less than 150 EUR*) entered the EU in 2025, contributing a dominant majority of **98% of total imported items**

Most of the consignments were **fulfilled by cross-border e-commerce e.g. AliExpress and Amazon** and **handed to European individual customers directly**, according to the European Commission

Amount (Billion) and Share of LVCs Directly Imported to the EU Handled by Customs by Year, European Commission



European Companies Place Heavy Investment And Play Important Role In The Value Chain

For example:

Workforce and Investment
DHL set a dedicated e-commerce division and holds **47,000 employees**. DHL also invested **€ 180 Million** for international logistic center in Poznań, Poland

Growth Driver
Geopost regards international delivery as a **strategic growth pillar** and achieved 6.5% growth. Invest in 150,000 **out-of-home pick-up points** to fulfill rapid needs

Last-Mile Infrastructure/Innovation
InPost operates over 45,000 **parcel lockers across the European Union**, providing innovative last-mile delivery option

Source: European Commission EU Customs Union facts and figures, Goods bought online

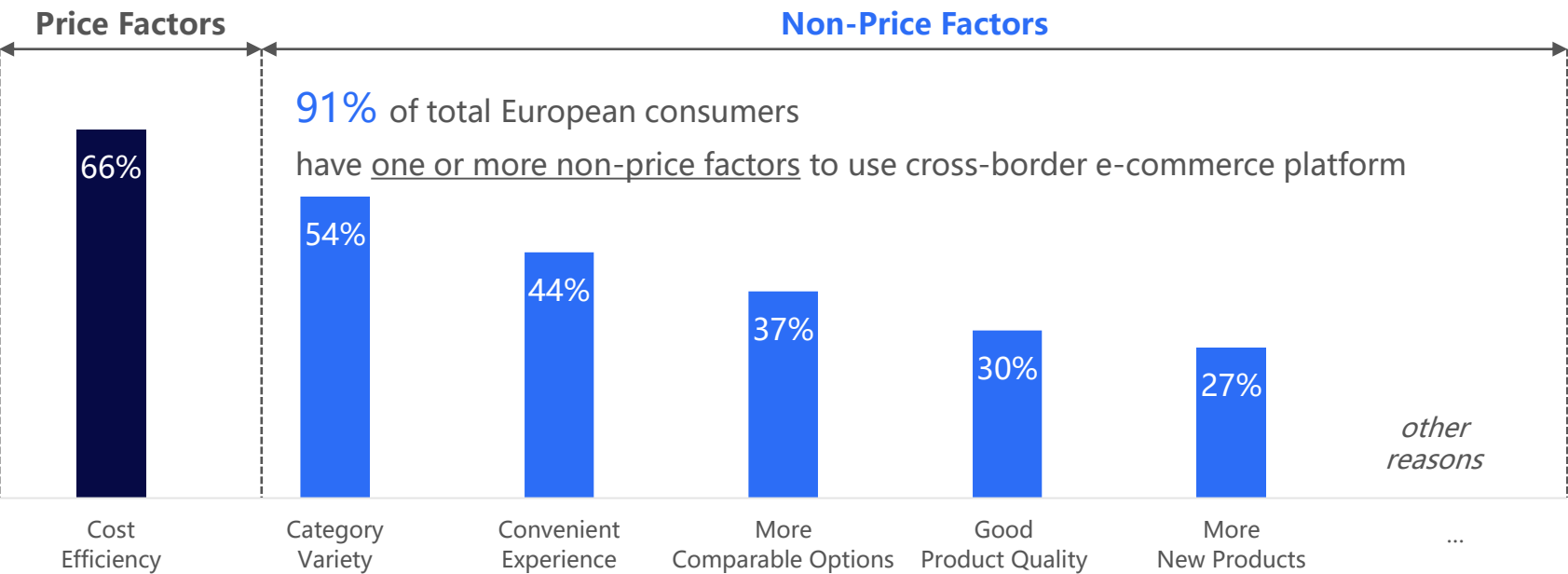
Beyond Bargains: 91% of European Shoppers Use Cross-border Platforms for Reasons Other Than Price

Better Variety, More Comparable Options, European Consumers Treat Cross-Border E-commerce More Than a Place to find Cheap Products

Cost efficiency remains the most popular reason for consumers to use platform, to maintain a life quality in a more efficiency way

Meanwhile the unique variety, and convenient experience backboned by fast growing logistics, play important roles in European consumers choice

Reasons to Use Cross-Border E-Commerce Platforms by European Shoppers



“...I always decorate by party according to the themes I want. Those decorations are not available locally, wither online or offline. So, I count on cross-border e-commerce. Decorations there are beautiful and a lot to choose from...”
-Polish Consumer, Translated

“...(Local store)Same products are much more expensive than those on AliExpress. Buying stuff like T-shirts on AliExpress is convenient. Products are durable and more affordable..”
-Italian Consumer, Translated

“...I always make low value purchases like kitchen utilities and sportswear on cross-border e-commerce. They are cheap. Cheaper than the local stores we have here....”
-Spanish consumer, Translated

Source: What are your main reasons for shopping on cross-border e-commerce platforms, N=2,501

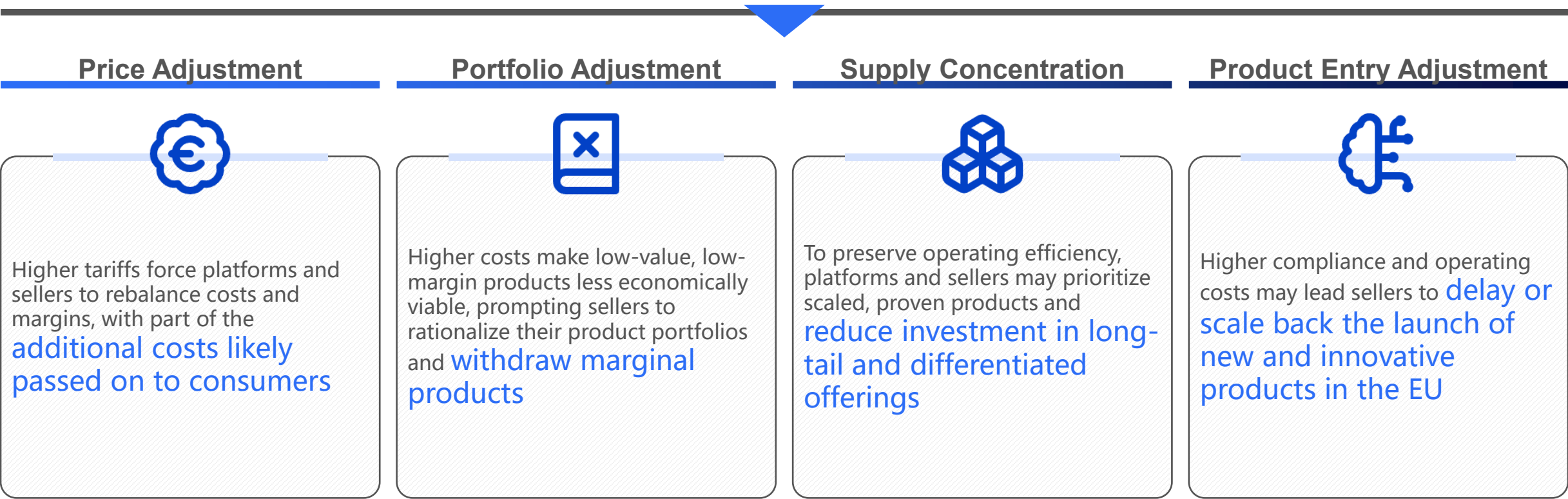
Four Regulatory Shifts Are Reshaping the Cross-border E-commerce Landscape in the EU

Tariff	Cost	Compliance	Regulatory
<u>Tariff for LVCs through E-Commerce</u>	<u>Extra Handling Fee per Parcel</u>	<u>Compliance Barrier for Products</u>	<u>Intensified DSA Enforcement</u>
€150 Exemption Removed and €3 Sub-Heading-Based Flat Duty Introduced The EU has removed the previous €150 customs duty exemption for low-value consignments (LVCs) And, introduced a temporary €3 flat-rate customs duty for each different tariff sub-heading of goods contained in a parcel <i>For example:</i> <i>For a parcel contains 1 phone screen protector(€ 0.8) and 1 charging cable(€ 0.8), €6 (€3 X 2) will be charged for different sub-headings</i> <i>Rather than an €3 duty for entire parcel, making a total of €6 duty for merchandise value under €2</i> The measure will until 1 Jul 2028, when the EU’ s new customs framework takes effect COUNCIL REGULATION amending Regulation (EC) No 1186/2009 as regards the elimination of the threshold-based customs duty relief	An Additional €2 Handling Fee Will Be Charged per Parcel in November 2026 The EU is set to introduce a new e-commerce handling fee by 1 November 2026 on low-value goods sold through distance sales into the EU The fee is intended to cover the costs associated with handling and monitoring small parcels, E-Commerce platforms and sellers conducting distance sales into the EU will be treated as the importer and responsible for the relevant customs formalities and payments <i>Set €2 handling fee for example:</i> <i>When handling fee takes effect, a parcel contains 1 charging cable(€0.8) will be charged for an €3 flat duty AND an €2 handling fee, making an €5.8 expense for merchandise value under €1</i> Council of the European Union: Commission non-paper on an e-commerce handling fee	Compliance Requirements Raise the Entry/Maintain Threshold for Low-value, Long-tail Products The EU General Product Safety Regulation (GPSR) has applied since 13 December 2024, introducing enhanced requirements for product safety, traceability and information disclosure, while strengthening the responsibilities of online platform and non-EU operators For cross-border sellers relying heavily on low-cost, low-value and long-tail SKUs, requirements such as product testing, technical documentation, labelling and safety information, and an EU-based responsible economic operator can increase the fixed compliance cost per SKU, potentially reducing the commercial viability European Commission — General Product Safety Regulation	Intensified EU enforcement raises the threshold for cross-border e-commerce platforms The EU has intensified regulatory enforcement against cross-border e-commerce platforms under the Digital Services Act (DSA), with investigations and sanctions involving AliExpress, Temu and Shein, particularly around illegal and unsafe products, trader traceability and consumer protection AliExpress faced formal proceedings from 2024 and was fined €550 million in 2026, while Temu was fined €200 million as well. Formal proceedings against Shein were opened in 2026 Increasing regulatory scrutiny raises the operating threshold for platforms through greater requirements for product governance, seller verification and risk management Commission opens formal proceedings against AliExpress under the Digital Services Act

...And These Barriers Potentially Push Platforms and Sellers to Take Actions and Adjustments

Tariff	Cost	Compliance	Regulatory
<u>Tariff for LVCs through E-Commerce</u>	<u>Extra Handling Fee per Parcel</u>	<u>Compliance Barrier for Products</u>	<u>Intensified DSA Enforcement</u>

The combined impact of multiple barriers, forces **platforms and sellers** to make necessary adjustments to their operations



How These Changes Could Affect European Consumers' Everyday Shopping

Tariff

Tariff for LVCs through E-Commerce

Cost

Extra Handling Fee per Parcel

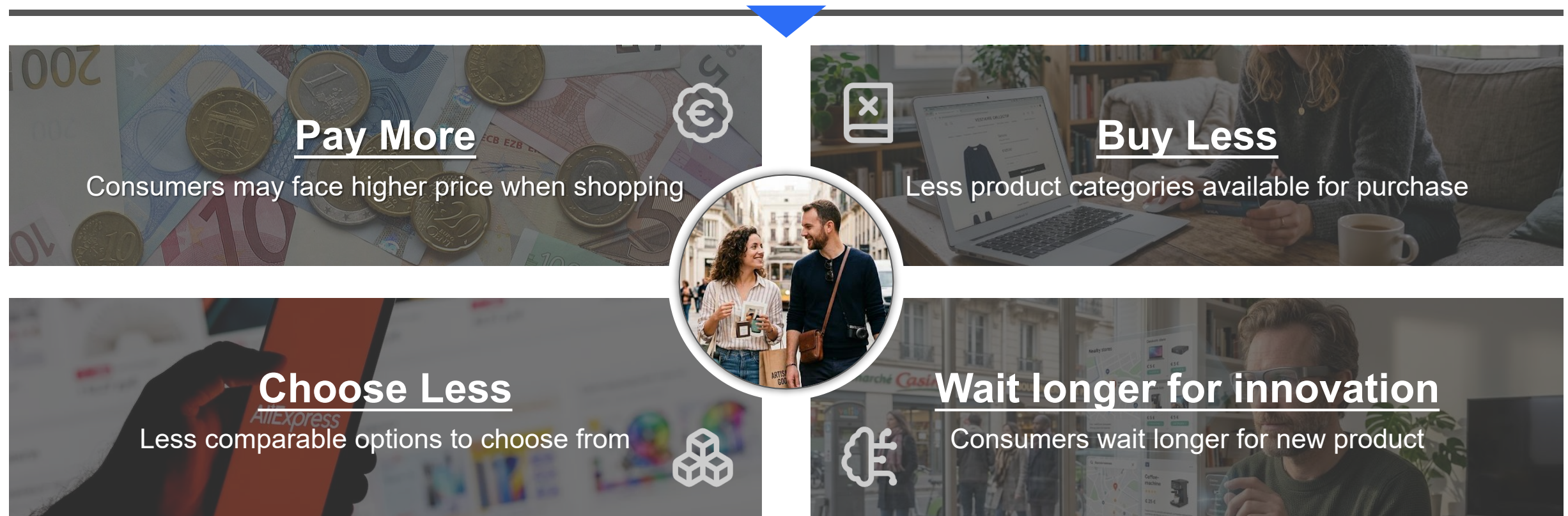
Compliance

Compliance Barrier for Products

Regulatory

Intensified DSA Enforcement

The combined impact of multiple barriers could adversely affect **European consumers' interests** in multiple ways



Consumer Voices Online Signal Growing Frustration — KleinS GmbH Commissioned NIQ to Conduct a Study to Assess the Scale

Clipped from social media:

(Translated) "...My son has been asking for this 3D printing pen for months. I had been watching it on AliExpress because it was around €35, which was reasonable for a birthday present. Now it's nearly €50. I just can't justify spending that much on something that was supposed to be a small gift..."

Thomas from Germany

Giving Up Original Plan Entirely

(Translated) "...I needed a very specific dish rack for my tiny kitchen. I found the perfect one online — foldable, wall-mounted and only €18. When I finally decided to order it, it was €31 and several of the cheaper options were no longer available. I ended up buying a €24 one locally, but it doesn't fit the space nearly as well..."

Sofia from Spain

Forced to Select Imperfect Substitution

(Translated) "...I used to find these little things so easily online. I needed a specific sunshade for my stroller, and I spent almost an entire evening checking different websites, comparing sizes, reviews and prices. I eventually found one that works, but it took me hours instead of a few minutes..."

Joanna from Poland

Increased Difficulty in Shopping Process

To assess whether these impacts are widespread, NIQ conducted a large-scale study among **2,501** consumers

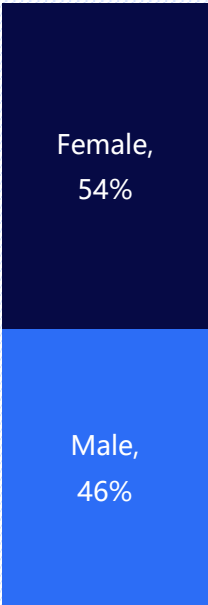
NIQ Conducted A Consumer Behavior Study Across Europe, Finding That 76% Of Consumers Are Experiencing Changes In Their Shopping Experience

Persona

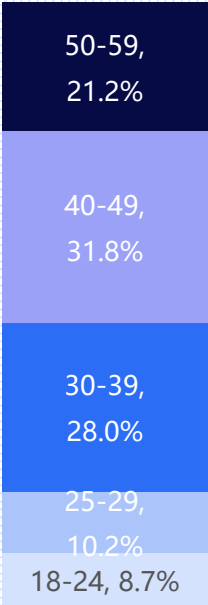
NIQ conducted an in-depth study of changes in consumer behavior among cross-border e-commerce shoppers in European Union countries, including Germany, France, Italy, Spain, and Poland



Gender



Age



In general,



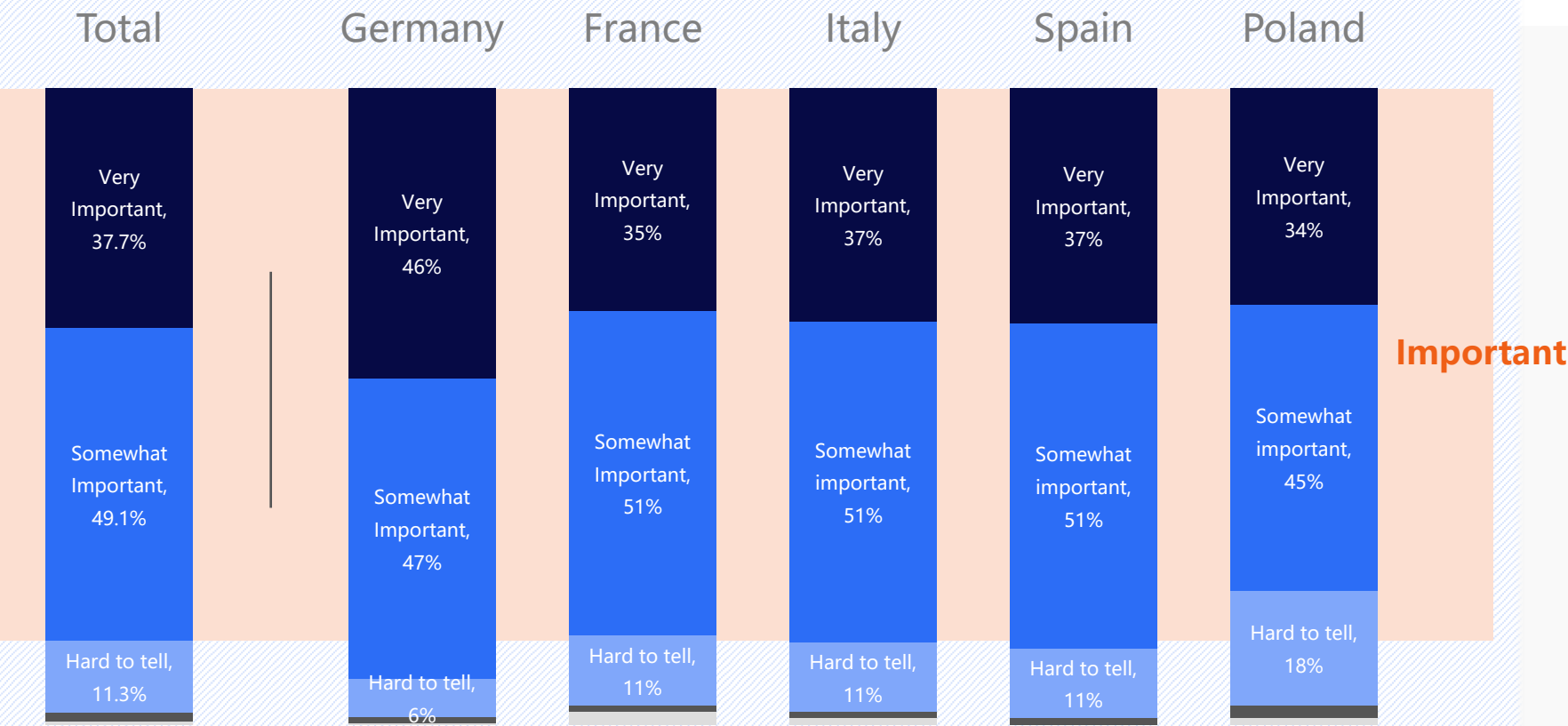
76% of consumers are experiencing changes in the broader consumer environment

Research commissioned by KleinS GmbH

*Source: What is your gender?; What is your age? Please enter your age at your last birthday
Recently, which of the following changes, if any, have occurred in your shopping behavior on cross-border e-commerce platforms, N=2,501*

Consumers Across Europe See Cross-border E-commerce As A Source Of Affordable Products, Helping Them Cope With Rising Inflations

Importance of Cross-border E-commerce



~87%

Important

of European consumers see cross-border e-commerce as an important channel for accessing affordable products, helping them better cope with rising prices

Source: How important are cross-border e-commerce platforms in helping you find products that offer better value for money?, N=2,501

Cross-border E-commerce Spending Up 22% Amid Rising Prices and New Fees

Environment Change

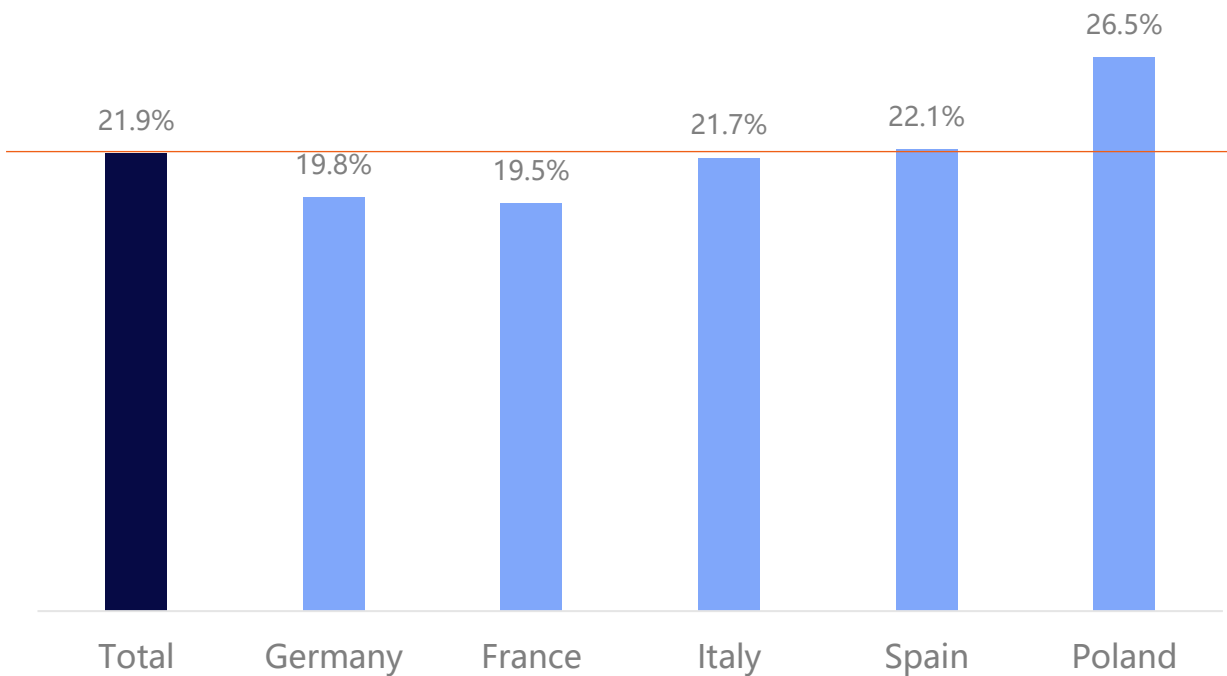
Business Environment

- €150 Exemption Removed
- €3 Temporary Flat Duty
- Union Handing Fee Charge
- ...

Consumer Rights

- Price Increase
- Less Product Categories
- Less Comparable Options
- Longer Wait Time

Spending Increase on Cross-border E-commerce



Source: When shopping on cross-border e-commerce platforms recently, have you noticed that your total spending has increased due to changes in product prices, taxes, or other fees? If so, by how much has your average spending per order increased?, N=2,501

European consumers have seen their total cross-border e-commerce spending increase by as much as 22% due to recent price increases,

placing further pressure on their overall household spending

Consumer Voice

"Duty makes the deliveries delay. I always accidentally spend more money than I used to"

Spanish Consumer, Translated

Amid a Broader Rise in Living Costs, New Tariffs on Cross-border E-commerce Add Further Pressure

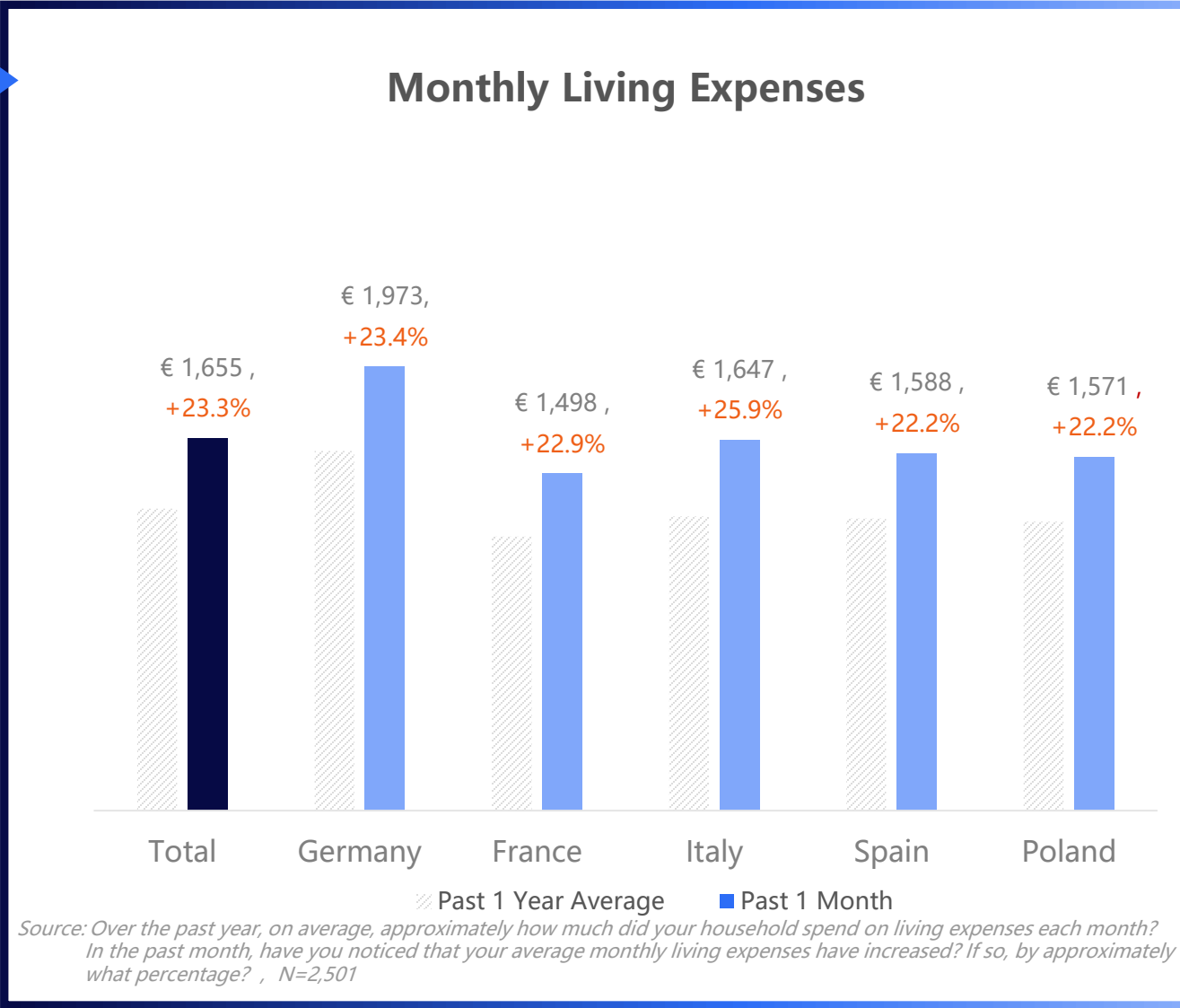
Environment Change

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European consumers' monthly living expenses have increased by around 23%

putting pressure on their quality of life

Consumer Voice

"Now a place to find affordable product is gone, especially every single product and service elsewhere is getting more and more expensive. It's unacceptable"

Spanish Consumer, Translated

Lower-income Households Hit Hardest: Living Expenses Up 28.9% vs. 22.3% for Average Earners

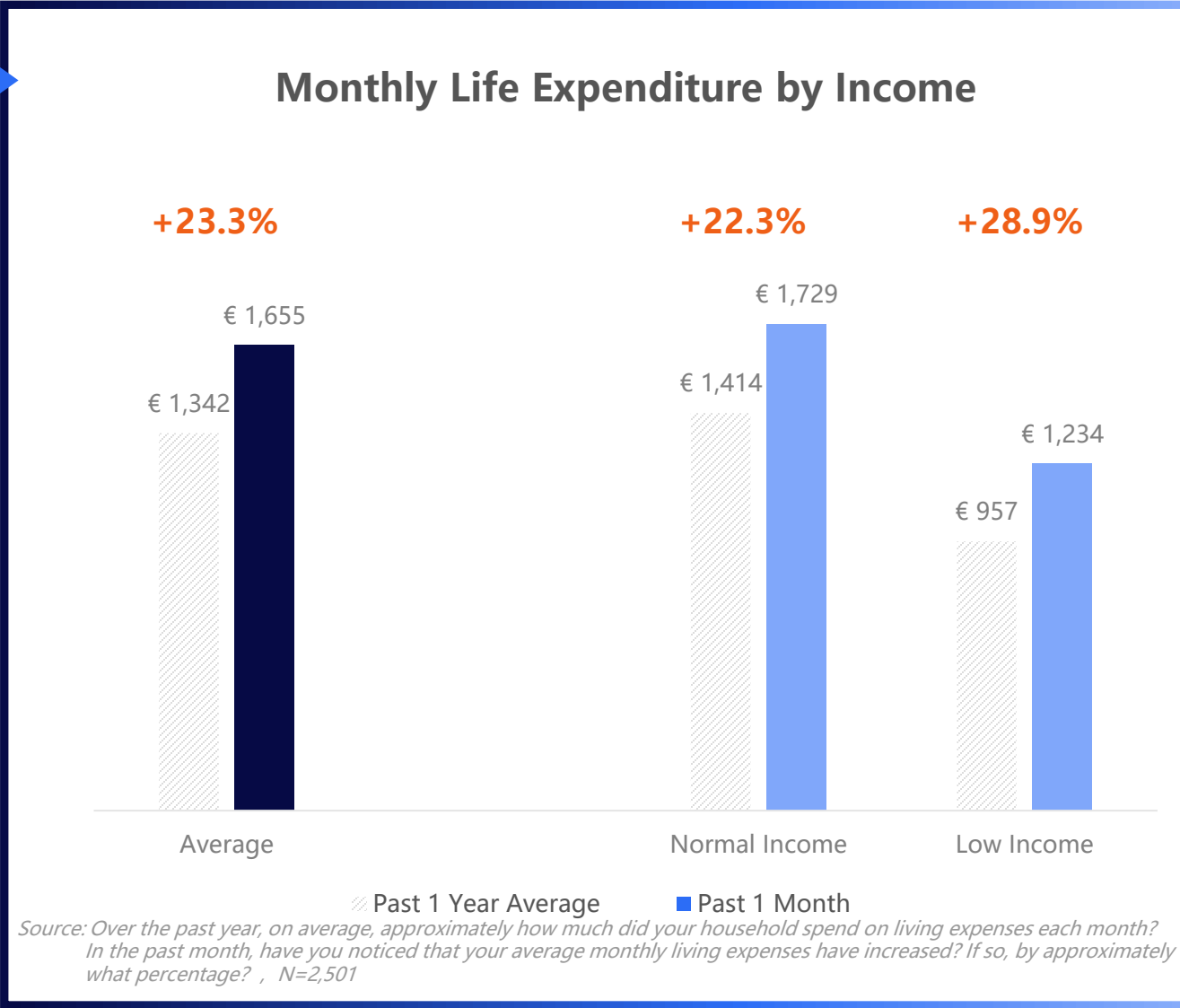
Environment Change

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Lower-income households, as defined by each country' s official criteria,

have been more heavily affected by these broader changes, with average living expenses increasing by **28.9%**

Consumer Voice

"These cross-border products make me feel good and help me against inflation. Now the prices went high. It' s a harm to low incomes"

Italian Consumer, Translated

Lower-income Families Cut Healthcare, Food and Clothing to Cope with Rising Costs

Environment Change

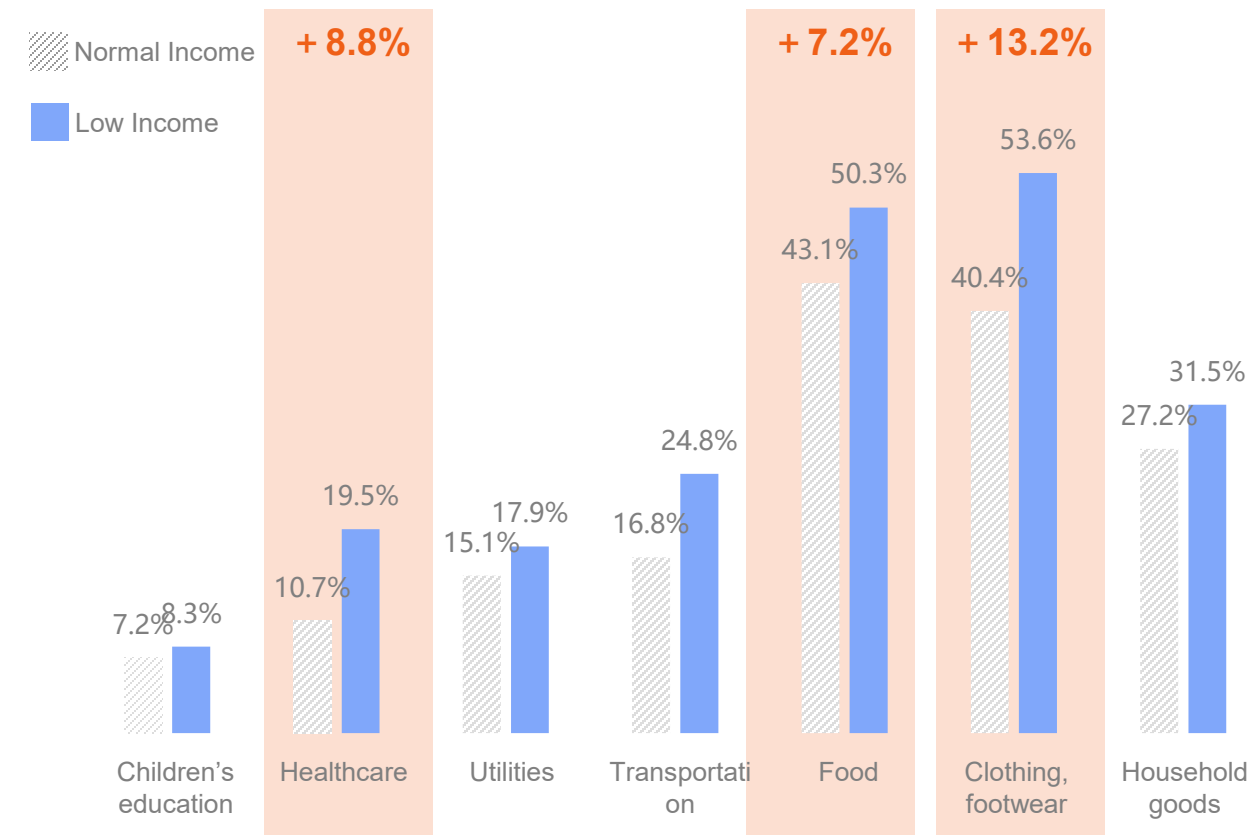
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living Costs Are Squeezing Essential Needs



Source: Would the increase in your total spending on cross-border e-commerce platforms lead you to spend less on any of the following? , N=1.959

To cope with rising cross-border e-commerce spending, lower-income households are cutting back on essential expenses,

with healthcare, food and clothing & footwear among the first areas affected

Some noticing cases squeezed on education

Consumer Voice

"It definitely squeeze my other purchase. For example, I just cannot buy clothes like I used to do"

French Consumer, Translated

Fewer Categories, Fewer Choices, Slower Innovation — Three Shifts European Shoppers Are Feeling

Environment Change

Business Environment

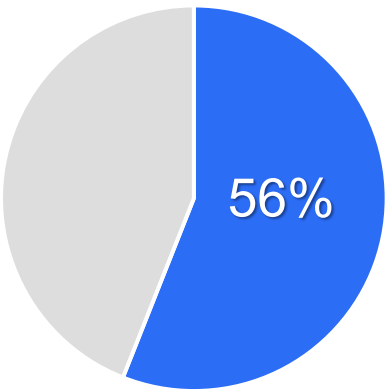
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Lower Product Category Availability

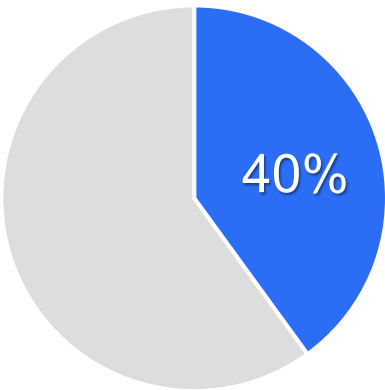
Decided not to buy anything because you could not find what you needed



Source: When shopping on cross-border e-commerce platforms recently, have you decided not to buy anything because you could not find what you needed?, N=2,501

Fewer Choice in Shopping Decision

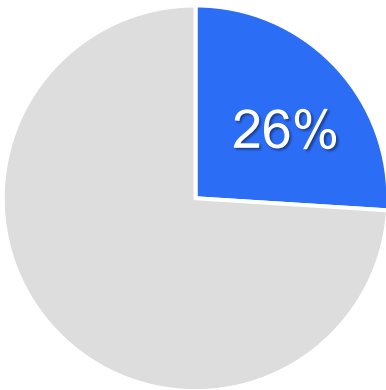
Ended up buying a product that did not fully meet your needs because you could not find one that did



Source: When shopping on cross-border e-commerce platforms recently, have you ended up buying a product that did not fully meet your needs because you could not find one that did? , N=2,501

Slower New Product Introduction

New products are being launched more slowly on these platforms



Source: When shopping on cross-border e-commerce platforms recently, have you noticed that new products are being launched more slowly on these platforms?, N=2,501

Consumers Now Spend 23%+ More Time Comparing and Choosing — 73% Report Longer Decision Cycles

Environment Change

Business Environment

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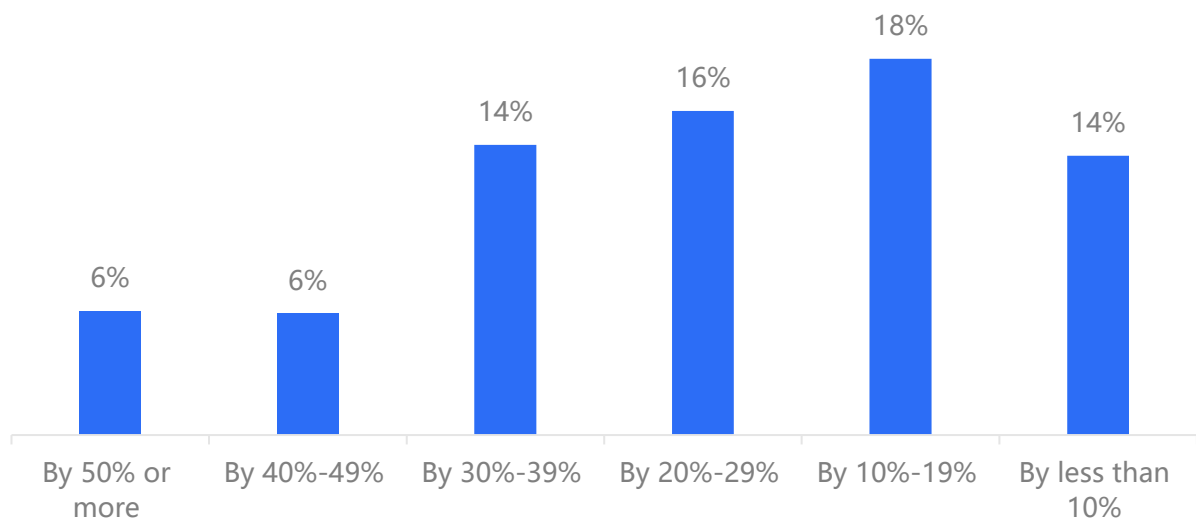
Consumer Rights

- Price Increase
- Less Product Categories
- Less Comparable Options
- Longer Wait Time

- Lower Product Category Availability
- Fewer Choice in Shopping Decision
- Slower New Product Introduction

Shopping Decision Time Change

Overall **73%** consumers suffer longer decision time when shopping



Source: When shopping on cross-border e-commerce platforms recently, have you noticed that you need to spend more time finding suitable products at an acceptable price? If so, by approximately what percentage has the time you spend on each purchase increased? , N=2,501

The changes in the broader commercial environment are prompting cross-border platforms and brands to alter their traditional approach to product launches

Consumers are spending **23% or more extra time** comparing and selecting products

Consumer Voice

"Now it cost me several hours more to find a good deal. They don' t understand we just want value for money rather than overspend. It' s not our fault"

Italian Consumer, Translated

Spending Intent Drops Across Europe — 67% of Lower-income Consumers Report Decline

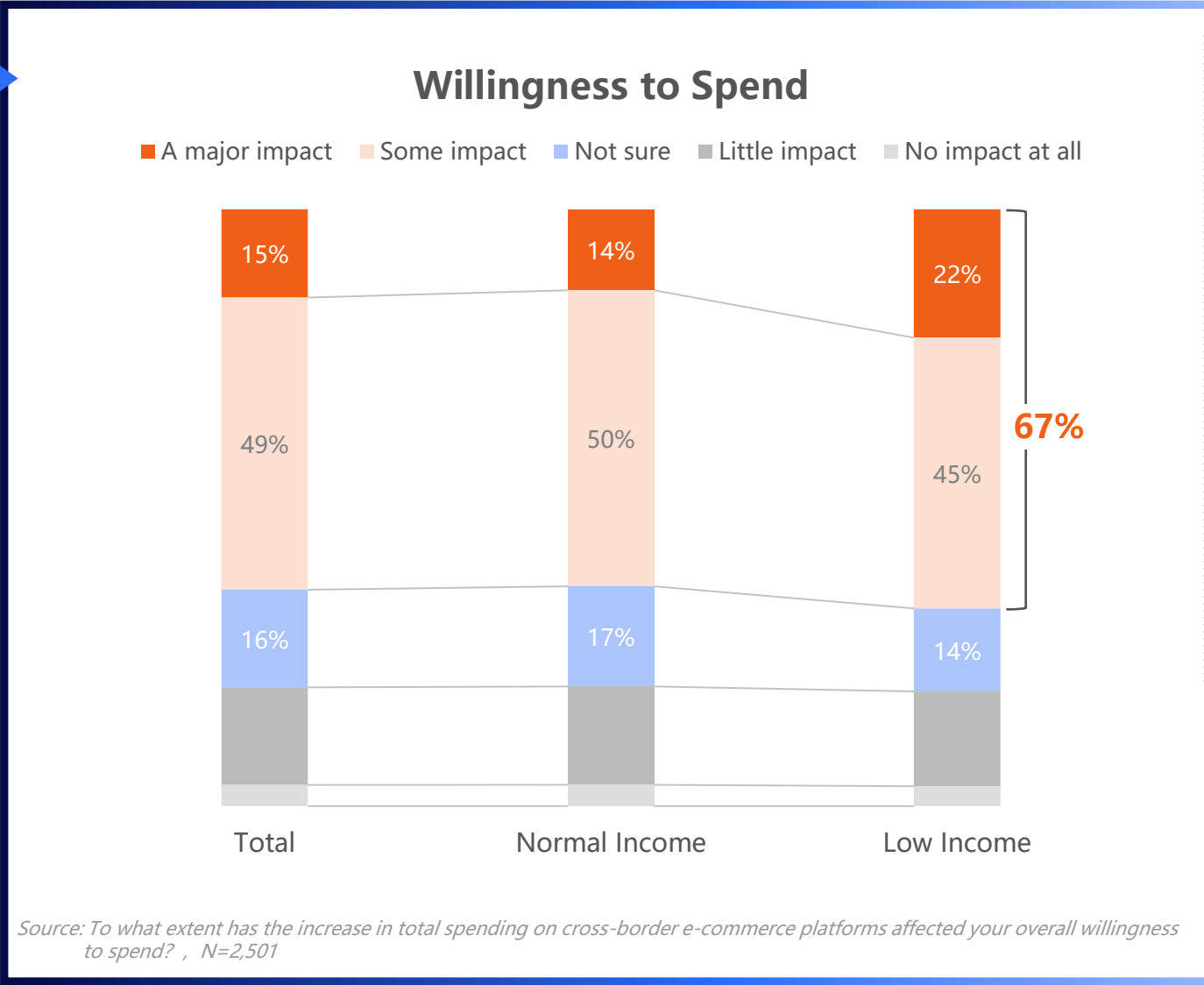
Environment Change

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Changes in the broader consumer environment are driving a decline in consumers' willingness to spend across Europe

The impact is even more pronounced among lower-income consumers
67% report a decline in their willingness to spend, **22%** declare a major impact

Consumer Voice

"The uprising price indeed reduced my willingness to consume"

German Consumer, Translated

92% of Consumers Have Not Switched to Local Channels — Variety and Convenience Remain Key

Environment Change

Business Environment

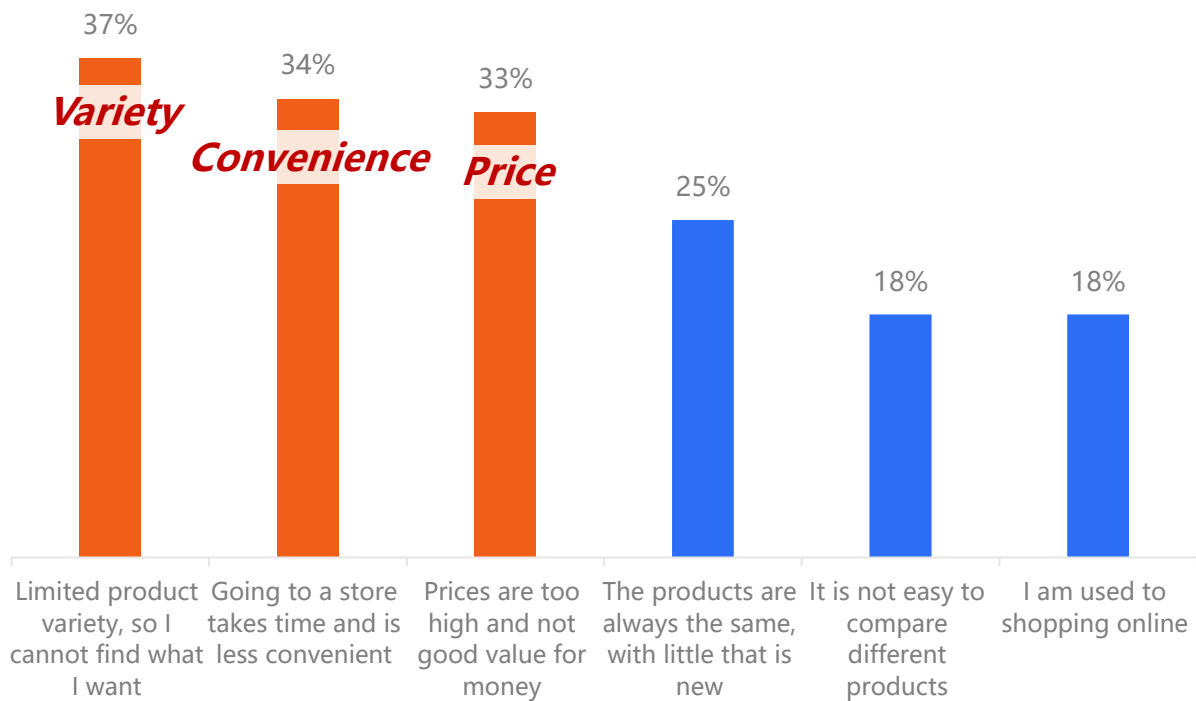
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92% of consumers have NOT switched to local purchase channels, online or offline

Reasons Not to Switching to Local Channels



Source: You mentioned that you have not switched to local offline channels. What is the reason? , N=2,368

European consumers remain highly reliant on cross-border e-commerce due to its value for money and wide product selection

Only 8% of consumers would switch their purchases to local e-commerce platforms or physical stores

Consumer Voice

“(with the flat duty charge)I wouldn’ t go to local store as well, simply because it just hasn’ t got the product I want”

Spanish Consumer, Translated

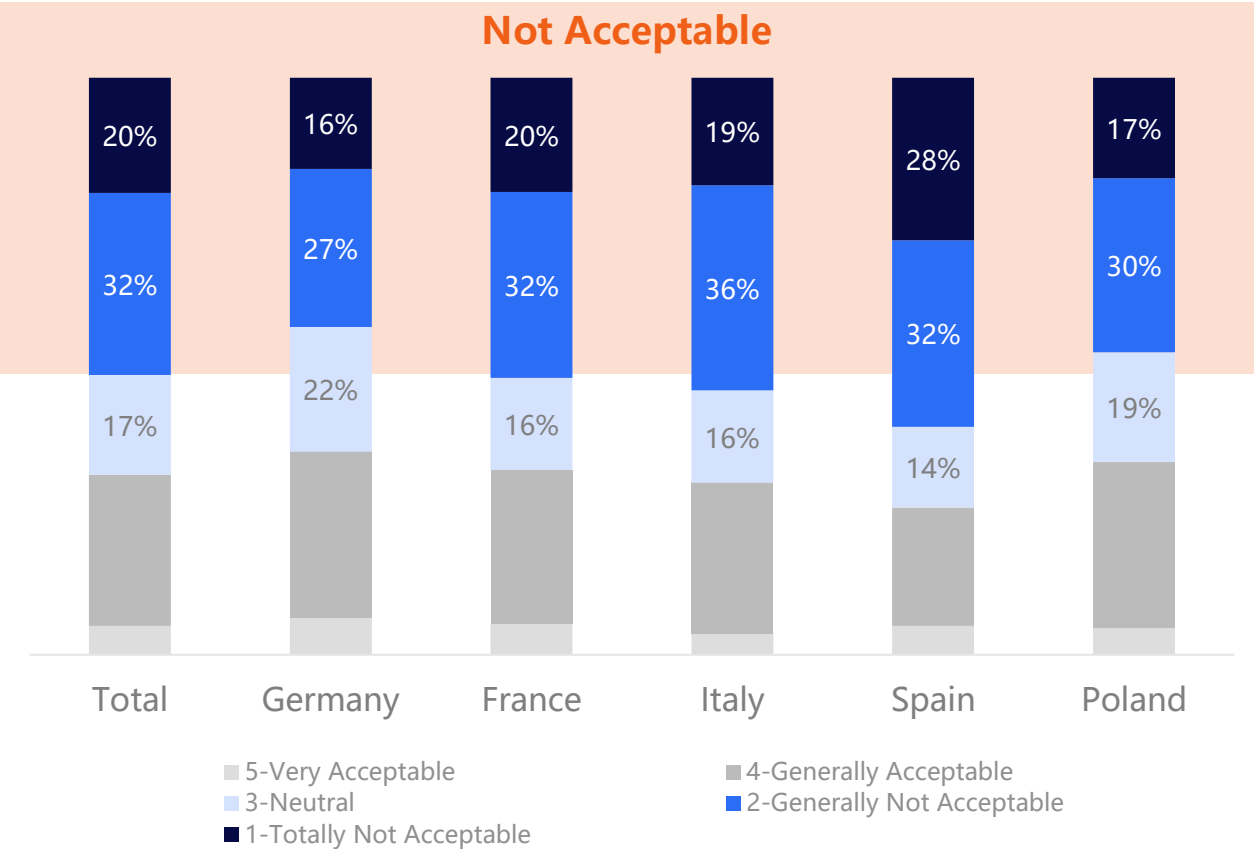
51% of Consumers Dissatisfied with Current €3 Flat Duty on Cross-border Purchases

Environment Change

Business Environment

€3 Temporary Flat Duty

When Shopping Via Cross-border E-commerce,
How Acceptable Are The Additional Fees Introduced Recently



Source: When shopping on cross-border e-commerce platforms, an additional EUR 3 is currently charged on purchases under EUR 150. How acceptable do you find this?, N=2,501

51% of European consumers are dissatisfied (1-2 points out of 5) with the additional duty or fees,

currently associated with cross-border e-commerce

Consumer Voice

"I bought lots of stuff value under €3. It will cost double, even triple money to buy. It's not fair"

Italian Consumer, Translated

Ahead of November 2026 Handling Fee, 55% of Consumers Already Oppose Further Increases

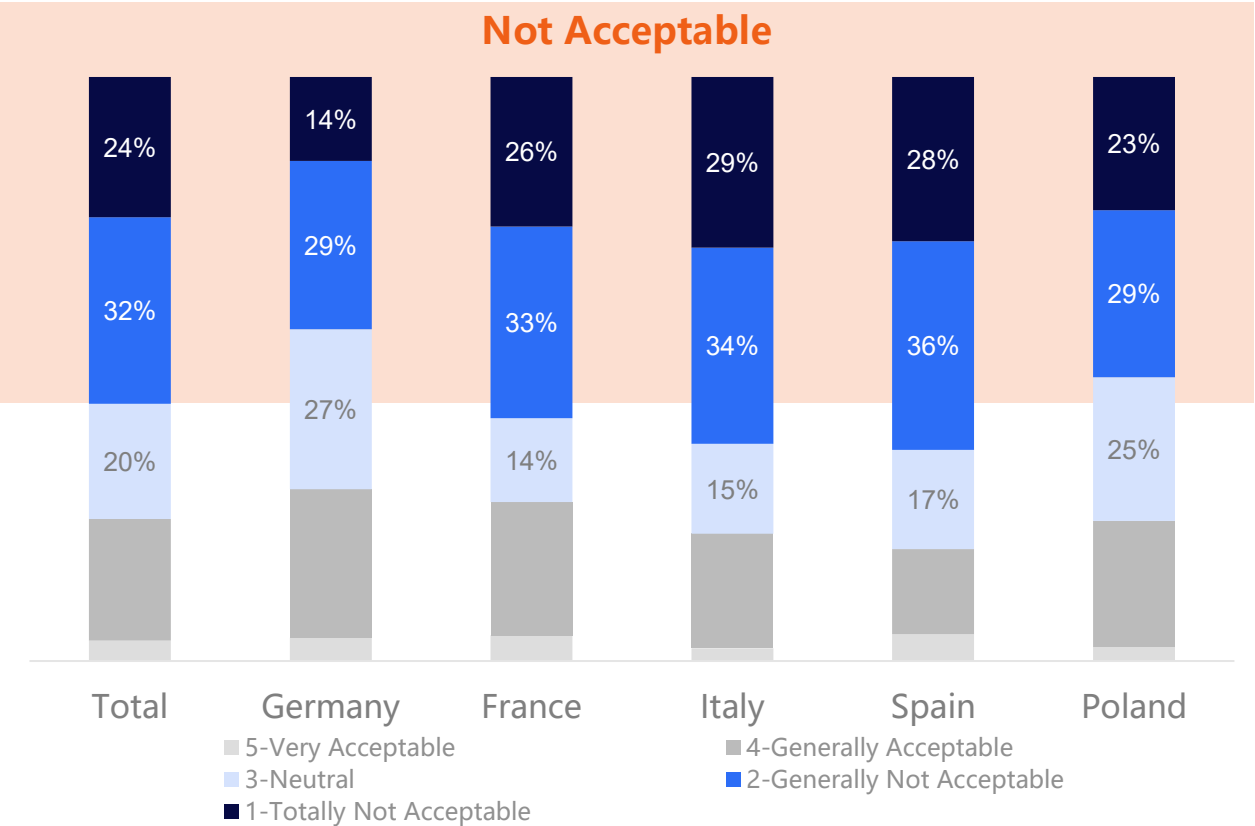
Environment Change

Business Environment

Union Handling Fee Charge

**This question is framed in the context of the EU's planned increase in handling fees for small parcels in November 2026*

When shopping via cross-border e-commerce, how acceptable would you find further increases in additional fees



Source: If, in the future, the customs duty and other additional charges for shopping on cross-border e-commerce platforms were to increase further (for example, a EUR 2 handling fee per order), how acceptable would you find this?, N=2,501

More than 55% of European consumers would be dissatisfied (1-2 points out of 5) with further increases in additional fees on cross-border e-commerce

Consumer Voice

"I think these additional charges should at least be considered for different countries. 15zł is a lot for us in Poland"

Polish Consumer, Translated

Recent Changes Surrounding Cross-border E-commerce Are Affecting European Consumers' Spending Intentions And Influencing Their Purchasing Behavior

Environment Change

Business Environment

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- ...

Consumer Rights

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For European Consumers:

Cross-border e-commerce is an important source of consumer purchases

- 87% of consumers use cross-border e-commerce to access better-value products and cope with inflation
- Quality and safety issues are not widespread among cross-border e-commerce users

Price and fee increases directly affect consumers' quality of life

- Recent price increases have driven a 22% increase in total cross-border e-commerce spending
- Monthly living expenses have risen by around 23%, with lower-income households hit harder, seeing average spending increase by 29% and facing greater pressure on essential expenses such as healthcare, food, and clothing

Changes in the broader environment are also reshaping the consumer experience

- 56% of consumers struggle to find the product categories they want, 40% perceive fewer product choices, and 26% believe the introduction of new products has slowed
- These changes are prompting 73% of consumers to spend more time comparing and choosing products, while only 8% would switch to local e-commerce platforms or physical stores

Spending intent is declining, with consumers opposed to current and future fee increases

- Changes in the broader environment have led to a decline in spending intent among 67% of lower-income consumers
- More than 51% of consumers are dissatisfied with the additional fees currently associated with cross-border e-commerce
- 55% of consumers oppose potential further fee increases on cross-border e-commerce



George Wang

Consulting & Analytics
Business Lead



Data indicates that the current regulatory trajectory is simultaneously causing a marked rise in the cost of living for low-income demographics and accelerating demand suppression, instead of redirecting it to local channels

“As European consumers continue to rely on cross-border e-commerce for value, choice and access, policymakers and industry stakeholders should work together to better understand these unintended consumer impacts and ensure that regulatory changes do not disproportionately burden those who rely on these channels most

Constructive dialogues and communication among policymakers, platforms, merchants and consumers will be essential to finding a balanced path forward:

One that protects consumers’ legitimate rights while preserving affordability, choice and access to innovation.”

THANKS

Thank you for your attention

For further information or to explore potential collaboration opportunities, please contact:
Silvia.li@nielseniq.com

