

NEWSLETTER

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Chinese sellers tap Russia's rapidly expanding e-commerce market

China's sellers are moving into Russia's fast-growing e-commerce market, which reached 12.6 trillion rubles (\$134 billion). Platforms such as Ozon and Wildberries attract rising numbers of Chinese merchants in apparel, electronics and home goods. Despite logistics delays and payout risks, Russia remains appealing for its lower competition, strong demand and early-stage opportunities ahead of upcoming tax and regulatory changes. **(Phoenix New Media)**

TikTok shop enters U.S. luxury market

TikTok Shop is moving into the U.S. luxury market, listing brands such as Hermès, Chanel, and Rolex ahead of Black Friday, supported by AI authentication and partnerships with certified agencies. Resale boutiques like 17th Street report strong sales and continued livestream expansion. The push builds on earlier UK pilots as rising Gen Z demand makes secondhand luxury a strategic growth avenue across major markets today. **(DSB)**

UK to end duty exemption for low-value imports

The UK will scrap its duty exemption for goods under £135, meaning all imports will face a 25% tariff from 2029. Low-value parcels from China—driven by Temu and SHEIN—have surged to about £3 billion. Officials say the change supports local retailers and could raise £500 million annually. The move aligns with similar U.S., EU, and Russian actions tightening small-parcel tax rules. **(Ebrun)**

China's e-commerce giants reveal diverging strategies in Q3 results

Alibaba, JD.com and Pinduoduo released Q3 2025 earnings, showing contrasting paths amid slowing user growth and rising competition. Alibaba is investing heavily in AI and instant retail, pressuring profit. JD.com is expanding food delivery and new retail to boost users. Pinduoduo is deepening its low-price, agriculture-driven model, becoming the only platform to post profit growth. **(DSB)**

Cross-border e-commerce sees "great divergence" in Black Friday performance

China's cross-border sellers showed sharply different Black Friday results. Consumer traffic stayed strong, but tariffs, compliance pressure, and higher advertising costs squeezed margins. Large sellers benefited from stronger supply chains and multi-channel strategies, while many small merchants faced weaker demand and price wars. Growth now relies on diversified markets and sustainable profitability. **(Ebrun)**