

How Italian Brands Win in the World's Fastest-Growing Ecommerce Markets

Where demand is accelerating and how Italian brands can capture it through execution.



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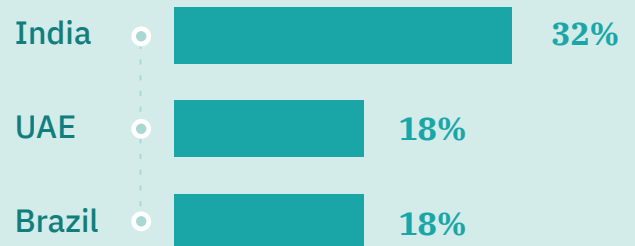
The Growth Shift Italian Brands Can't Ignore

“Made in Italy” remains a global trust signal built on design authority and craftsmanship. What has changed is where growth is forming.

While many mature ecommerce markets are plateauing, consumer demand is accelerating in a small set of emerging markets where online loyalty is still being defined.

India, Brazil, Turkey, and the Middle East are not future opportunities, they are active demand pools, where online spending is already at rates above the global average.

ESW's Global Voices research shows that consumers planning to increase online spending are heavily concentrated in:



Compared with a global average of just **11%**, this is a structural shift — not a short-term spike.

“Winning these markets doesn't require heavy upfront capex or rigid long-term bets. It requires an operating model that allows brands to enter quickly, scale selectively, and adapt as conditions evolve.”

Giulio Cancelli, Sales Director, ESW Italy

Why This Matters Now

Three forces are driving the shift:

1 MOBILE-FIRST COMMERCE IS NOW THE DEFAULT

Smartphone-led browsing and checkout now dominate in Turkey and across the Middle East, with mobile commerce priority rising as digital infrastructure scales. ^[3]^[4]

2 INDIA IS SHIFTING FROM ASPIRATION TO TRANSACTION

India's online retail market is projected to grow from USD 70B in 2022 to USD 325B by 2030, driven by:

- 220M digitally native shoppers
- Nationwide logistics coverage across ~19,000 pin codes
- A Gen Z cohort actively trading up into premium categories

For Italian brands, this represents the largest emerging premium demand pool globally – forming online, not in-store. ^[5]

3 SPEND IS LOCALISING

Consumers who once purchased Italian brands while travelling are now buying locally, but only if:

- Duties and taxes are clear upfront
- Pricing feels consistent with Europe
- Delivery and returns are predictable

The demand already exists. The brands that convert it early will define category expectations.

The Italian Advantage

Italian brands already embody what these consumers aspire to: style, craftsmanship, and cultural credibility. These markets reward heritage and authenticity – attributes Italian brands own.

Where Italian Brands Should Be Looking Next

The following is a snapshot of the most strategically compelling markets for Italian fashion and luxury brands.



1

India: Lead Scale Market (Primary)

India is moving from aspirational to transactional at scale, with digital-first consumption and Gen Z driving premiumisation.

MARKET SNAPSHOT



73% of purchase decisions influenced by online marketplaces, peer reviews, and YouTube. India's D2C market reached USD 80B in 2024, on track for USD 100B in 2025 ^[6]



Gen Z represents 43% of consumption with ~USD 250B in spending power. ^[6]



32% plan to increase online spending (highest globally). ^[1]

Why it matters to Italian brands

India represents the single largest long-term growth opportunity globally. A digitally savvy, Gen Z-driven market is actively seeking premium and heritage brands with strong design narratives, which is an area where Italian labels hold a natural advantage.

Success depends on mobile-first UX, transparent landed costs, and local payment options to capture loyalty early and scale profitably.

Turkey: Gateway Market (Strategic Bridge)

Turkey combines scale, digital maturity, and regional proximity, making it an ideal launchpad.

MARKET SNAPSHOT



Ecommerce growth from USD 16.2B in 2019 to **USD 44.8B** by 2030 (CAGR ~7.5%), making it one of the region's most dynamic digital economies. ^[7]



94% online shopper penetration ^[7]



Fashion and accessories now lead ecommerce by volume, with **49%** of fashion ecommerce revenue from apparel. ^[8]

Why it matters to Italian brands

Italian fashion and lifestyle brands enjoy high recognition and trust in Turkey. The opportunity lies in converting that affinity into digital revenue.

Brands that localise payments, reduce checkout friction, and provide predictable delivery can unlock immediate demand while using Turkey as a bridge for regional expansion.

Brazil: Discipline-Driven Market (Operational Excellence)

Brazil is Latin America's anchor for premium ecommerce, rewarding brands that execute with precision.

MARKET SNAPSHOT



Luxury market growth of **+6%** in 2024, outperforming global trends.



Brazilians are the largest luxury spenders in the U.S. by nationality. ^[10]



Consumer intent: **18%** plan to increase online spending. ^[1]

Why it matters to Italian brands

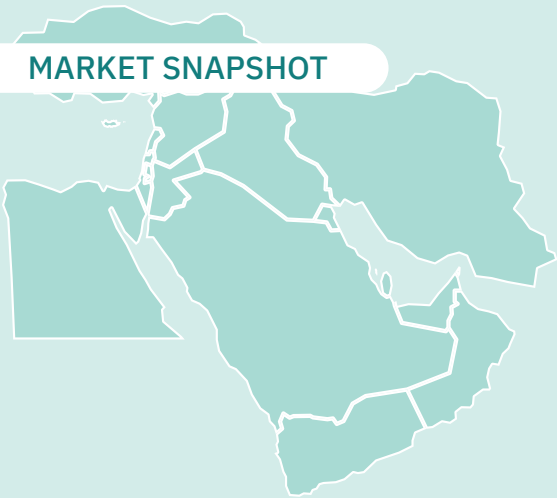
Brazilian consumers have a deep affinity for Italian fashion and design. As travel-based purchasing fluctuates, ecommerce is the lever to retain and grow demand locally.

Success hinges on transparent pricing, duties/tax clarity, and reliable delivery to overcome operational complexity and protect brand equity.

Middle East: Influence-Led, Premium-Driven (Momentum)

The Middle East remains one of the most resilient luxury regions globally.

MARKET SNAPSHOT



Ecommerce market projected to grow from USD 27.9B (2025) to **USD 49.5B** by 2030 at a CAGR of 12.10% ^[11]



Consumer intent: **18%** plan to increase online spending. ^[1]



High willingness to pay for premium delivery and returns.

Why it matters to Italian brands

Italian brands align naturally with gifting, jewellery, and fashion traditions across the GCC. Ecommerce is now the fastest-growing channel, particularly among younger, affluent consumers who expect premium digital experiences that match the brand promise.

The Real Challenges Italian Brands Must Address

These challenges are structural. Ignoring them stops growth.

1 CHECKOUT FRICTION

Cart abandonment regularly exceeds 70%, driven by missing local payment methods, lack of instalment options, and late-stage tax surprises.

2 PRICING MISALIGNMENT

Consumers compare global prices aggressively. Any perception of overcharging versus Europe damages trust instantly, especially in premium segments.

3 CUSTOMS, DUTIES, AND COMPLIANCE COMPLEXITY

Markets like Brazil, India, and Turkey require precise handling. Delays and unpredictable costs degrade customer experience and profitability.

4 PAYMENTS

Local wallets and BNPL options are no longer optional. Without them, even trusted premium brands lose conversion.

5 LOCALISATION GAPS

Translated European sites do not convert. Mobile-first UX, local language, social commerce integration, and region-specific customer service are mandatory.

These challenges are structural, ignoring them does not slow growth, it stops it.

The Operating Capabilities Required to Win

Your Cross-Border Readiness Checklist

Winning in emerging markets comes down to removing friction before scale.

Payments, Pricing & Compliance

- **Local payment methods**
PIX, KNET, BNPL, mobile wallets - without these, conversion collapses.
- **Transparent landed cost**
Show duties, taxes, and fees upfront. No surprises at checkout.
- **EU-aligned pricing controls**
Maintain global price integrity to protect trust and brand equity.
- **Regulatory, tax, and customs compliance**
End-to-end handling to avoid costly missteps.

Payments, Pricing & Compliance

- **Unified consumer data**
Track spend intent, abandonment triggers, and payment preferences across markets.
- **Market intelligence integration**
Inform assortment, pricing, and promotional strategies with real-time insights.

Experience & Operations

- **Mobile-first checkout flows**
Localised and optimised for mobile-first markets and high-trust experiences.
- **Social commerce integration**
Enable influencer-driven discovery in markets like India.
- **Content localisation**
Adapt storytelling; Arabic & Turkish UX; culturally resonant storytelling.
- **Fast, predictable delivery + easy returns**
Meet rising expectations for convenience and reliability
- **Scalable logistics infrastructure**
Expand into multiple markets without setting up local entities.

Evidence from the Market

The iconic Italian jewellery Damiani partnered with ESW and Arsenalia to scale across 36 international markets, including South Korea, UAE, the US, Australia, and Luxembourg.



+17.5%

YoY order growth



+17.4%

increase in checkout conversion

A clear example of how friction-free cross-border execution unlocks growth.

The Cost of Waiting

1 LOYALTY LOCKS IN EARLY

Late entrants face higher CACs.

2 PRICE BENCHMARKS ARE SET FAST

First movers shape perception.

3 OPERATIONAL LEARNING COMPOUNDS

Early entrants widen the margin gap over time.

Bottom line: the window is open now. Waiting hands the advantage to competitors who define local expectations first.



“The brands that move now, with the right level of agility, will define the next decade of international growth.”

Giulio Cancelli, Sales Director, ESW Italy

ESW x Arsenalia: From Market Opportunity to Scalable Execution

Italian brands are currently positioned at the intersection of a unique macroeconomic "triple alignment": surging global demand for *Made in Italy* excellence, matured digital adoption in emerging markets, and a post-geographic consumer base seeking premium authenticity. However, converting this temporal window into a permanent market position requires **structural agility**.

From Arsenalia's perspective, the primary risk for luxury and fashion brands is the **dilution of brand equity** during rapid expansion. The strategic imperative is to solve the tension between local market intimacy and centralized global governance.

1 MARKET ENTRY ≠ MARKET SUCCESS

Access to markets is no longer the constraint. Differentiation comes from orchestrating CX, pricing, content, and operations coherently from day one.

2 CROSS-BORDER AS A STRUCTURAL CAPABILITY

Leading brands embed internationalisation into their digital factory, treating it as a long-term capability rather than a sequence of country launches.

3 LOCAL RELEVANCE, GLOBAL GOVERNANCE

High-growth markets demand deep localisation within clear central rules on brand equity, pricing integrity, and data ownership.

4 CX AND OPERATIONS CONVERGE

In mobile-first, social-driven markets, checkout, landed cost transparency, delivery, and returns are decisive moments of experience.

A Shared Framework for International Scale

Arsenalia and ESW operate as **strategic partners** supporting brands across the full international growth journey.

Arsenalia brings **consulting, digital transformation, and end-to-end governance**: market strategy, operating model, customer experience design, and integration within the brand's core digital ecosystem.

ESW enables **international expansion at scale**, managing tax and duties, payments, compliance, fraud prevention, logistics orchestration, and returns across high-growth markets through a unified operating platform.

The partnership is grounded in **leading fashion and luxury case histories** drawn from proven brand deployments, alongside a ready-to-use framework designed to

- Accelerate market entry
- Reduce execution risk
- Protect brand equity
- Scale selectively based on real demand signals.

Together, ESW and Arsenalia help Italian brands transform international expansion from tactical opportunity into a governed, scalable growth engine.

"In the fastest-growing markets, the gap between ambition and achievement is defined by the quality of operating models. International expansion rewards brands that can orchestrate complexity while maintaining consistency across every touchpoint along the customer journey. This is where partners such as Arsenalia and ESW can make a meaningful difference."

Marco Dalla Libera, Partner, Arsenalia

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