ingrid

Peak Season Benchmarks

Delivery checkout insights from
Black Friday and Cyber Monday 2025

"Our annual peak season data initiative reveals benchmarks to support retailers in making informed decisions instead of relying on one-size-fits-all guesswork. With these insights, they can test free shipping thresholds and premium delivery options without risking customer experience."

Piotr Zaleski
CPO and Co-founder of Ingrid

Content

01 Order performance

ORDER PERFORMANCE

From Monday drop to Sunday peak

During Black Week 2025, Monday's sharp year-over-year (YoY) decline gave way to a strong Tuesday rebound. The dip reflects a timing quirk— in 2024, Black Monday fell on Swedish payday, the market that represents about half of Ingrid's order volume.

Although Black Friday drove the biggest order volumes overall, Sunday revealed an interesting pattern across both 2024 and 2025 campaigns.

Closing hours on Sunday deliver the highest number of orders per second of the entire Black Friday week, as consumers were making a final push to catch remaining offers before they expire.

Retail sector performance split sharply. Sports and Outdoor led YoY growth, likely driven by higher price points for performance gear and equipment, while Fashion, Home and Electronics, and Pharmacy and Health showed modest gains.

Total order volume grew substantially, which reflects both platform expansion and sustained shopping demand across the extended promotional period.

ORDER PERFORMANCE

Delivery checkout order volume

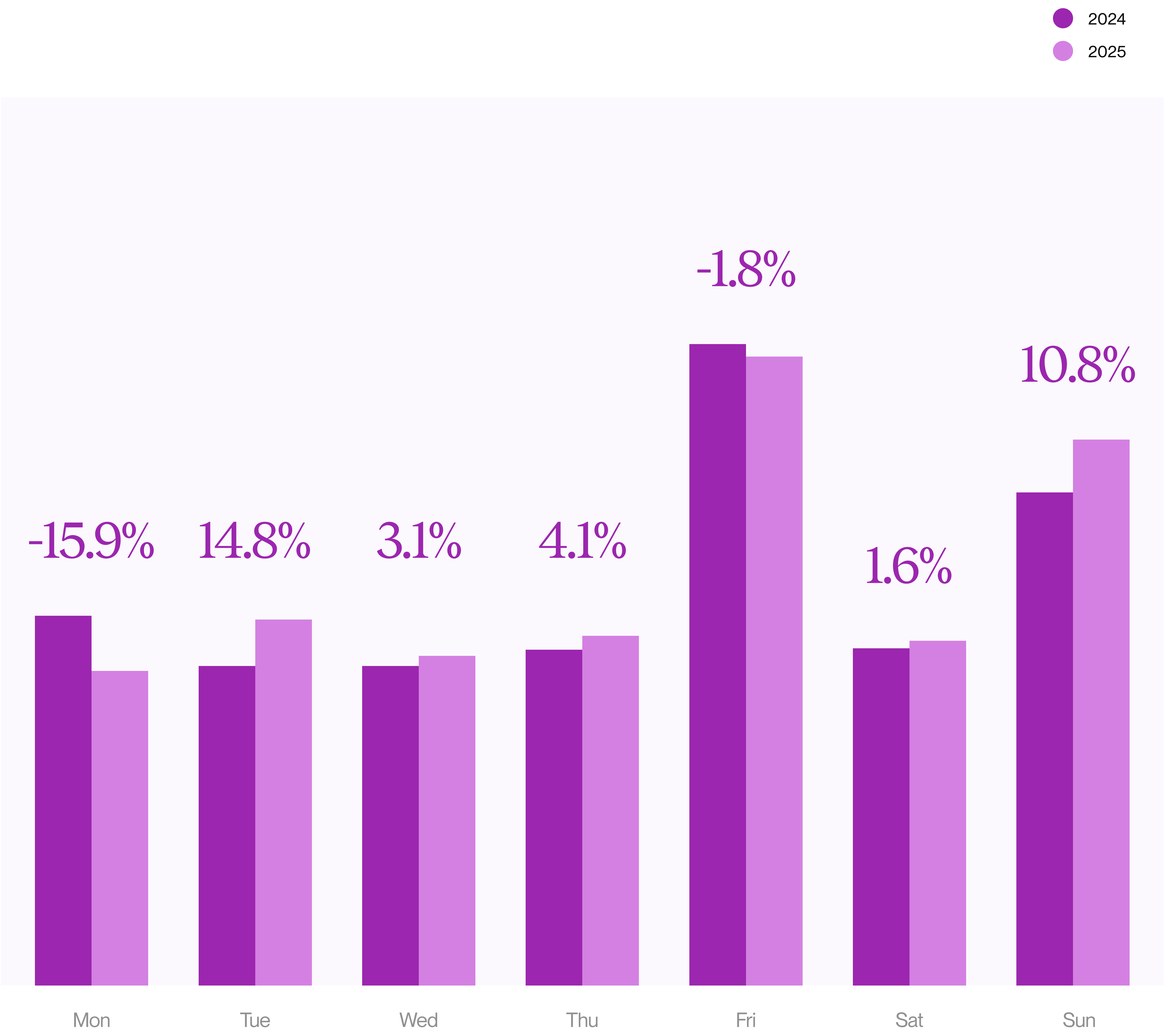
In 2025, daily order volume swung dramatically throughout the Black Friday week, starting with Monday's 16% decline before Tuesday's 15% rebound, while Sunday closed with a strong 11% surge. Friday dropped 1.8% YoY, breaking from the 2024 pattern when it was a peak shopping day not only by order volume but orders per second, too. Cyber Monday showed a slight 1.8% dip.

2.1%

YoY order volume growth

32%

Total order volume growth



*Year-over-year (YoY) performance was measured for retailers active in both time periods.
**Total volume growth was measured for all active retailers.

ORDER PERFORMANCE

Average order volume by hour (UTC)

How did Black Week shopping trends unfold throughout the day? While orders started off steady in the early hours, the real action kicked in during the evening, when shoppers rushed to grab the best deals. It looks like timing your promotions right can make all the difference.

5.5

Orders/sec on average
— Black Week 2025
(vs. 3.1 orders/sec during a regular week)

16.9

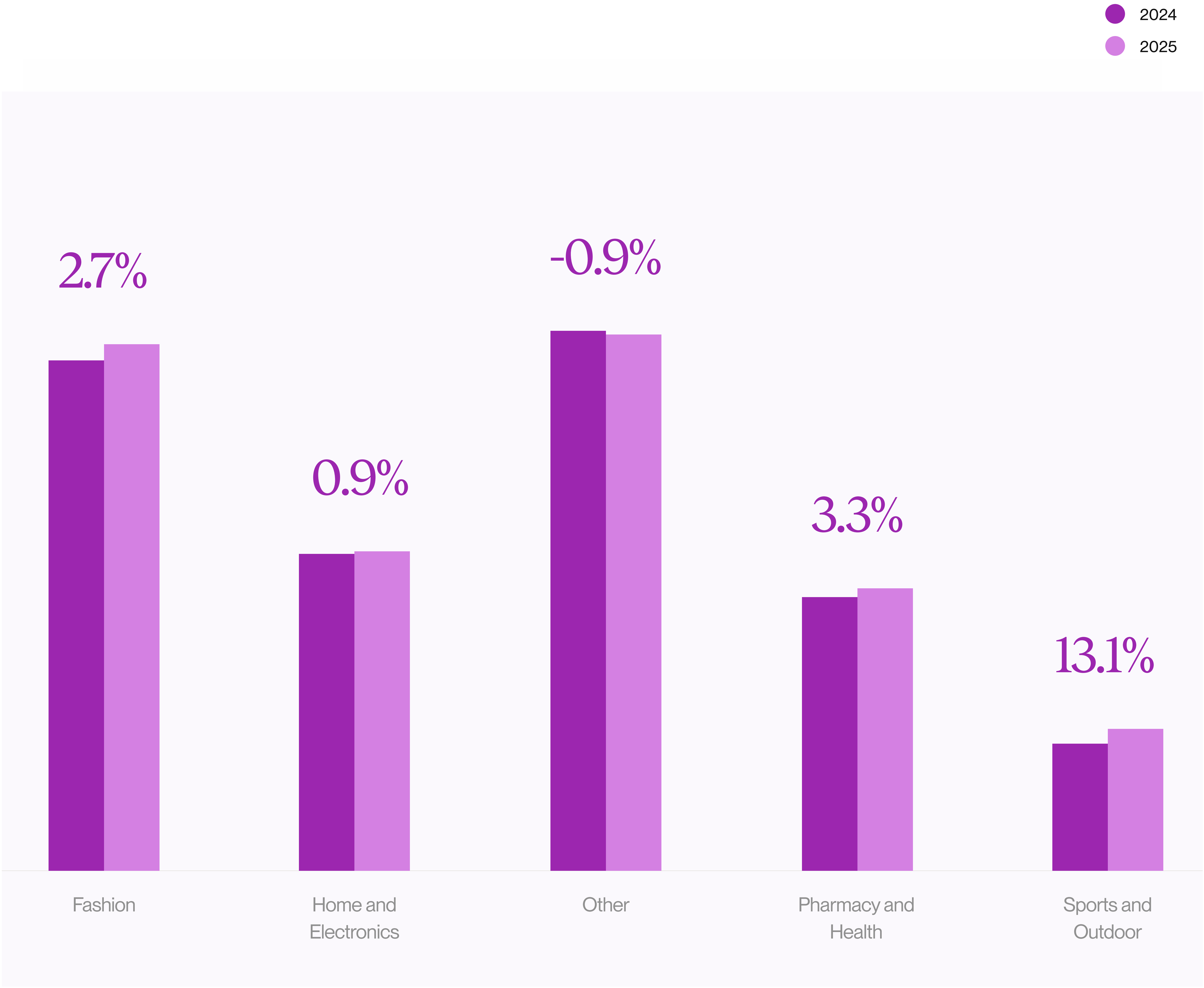
Peak orders/sec
— Sunday, Nov 30

*Based on orders made from Sweden.

ORDER PERFORMANCE

Order volume trends by retail sector

Sports and Outdoor dominated Black Week 2025 with 13% YoY growth, significantly outpacing other sectors. Fashion, Home and Electronics, and Pharmacy and Health showed modest gains, while Other categories like skincare and children's goods slipped 1%.



*Year-over-year (YoY) performance was measured for retailers active in both time periods, unless specified otherwise.
**Other categories include Skincare, Cosmetics, Children's Goods, Pet Supplies, and more.

ORDER PERFORMANCE

The largest markets by order volume outside Sweden

Nearly half of checkout orders across Ingrid Platform originate outside Sweden.

1 Norway
2 Germany
3 UK
4 Denmark
5 Finland

02 Delivery preferences

DELIVERY PREFERENCES

Home delivery ranks highest

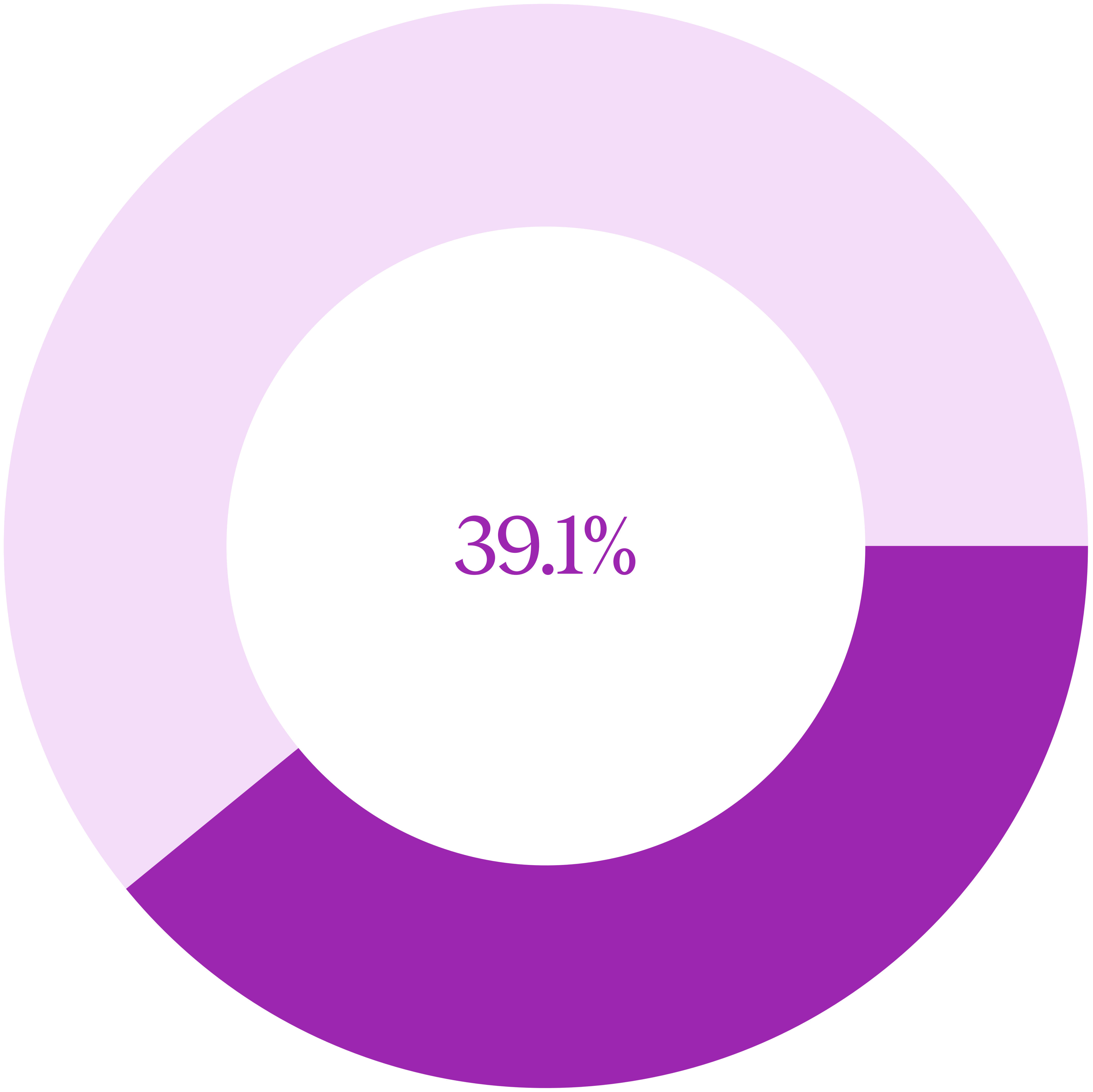
Traditional home delivery still captures the largest share of orders during peak season as the preferred choice for customers during high-volume periods.

Out-of-home (OOH) delivery options like parcel lockers and service points — think press agents, supermarkets, carrier offices — collectively rival home delivery, which suggests shoppers value flexibility and personalization at times when home delivery may take longer. Essentially, there's no one-size-fits-all approach.

DELIVERY PREFERENCES

Sustainable delivery

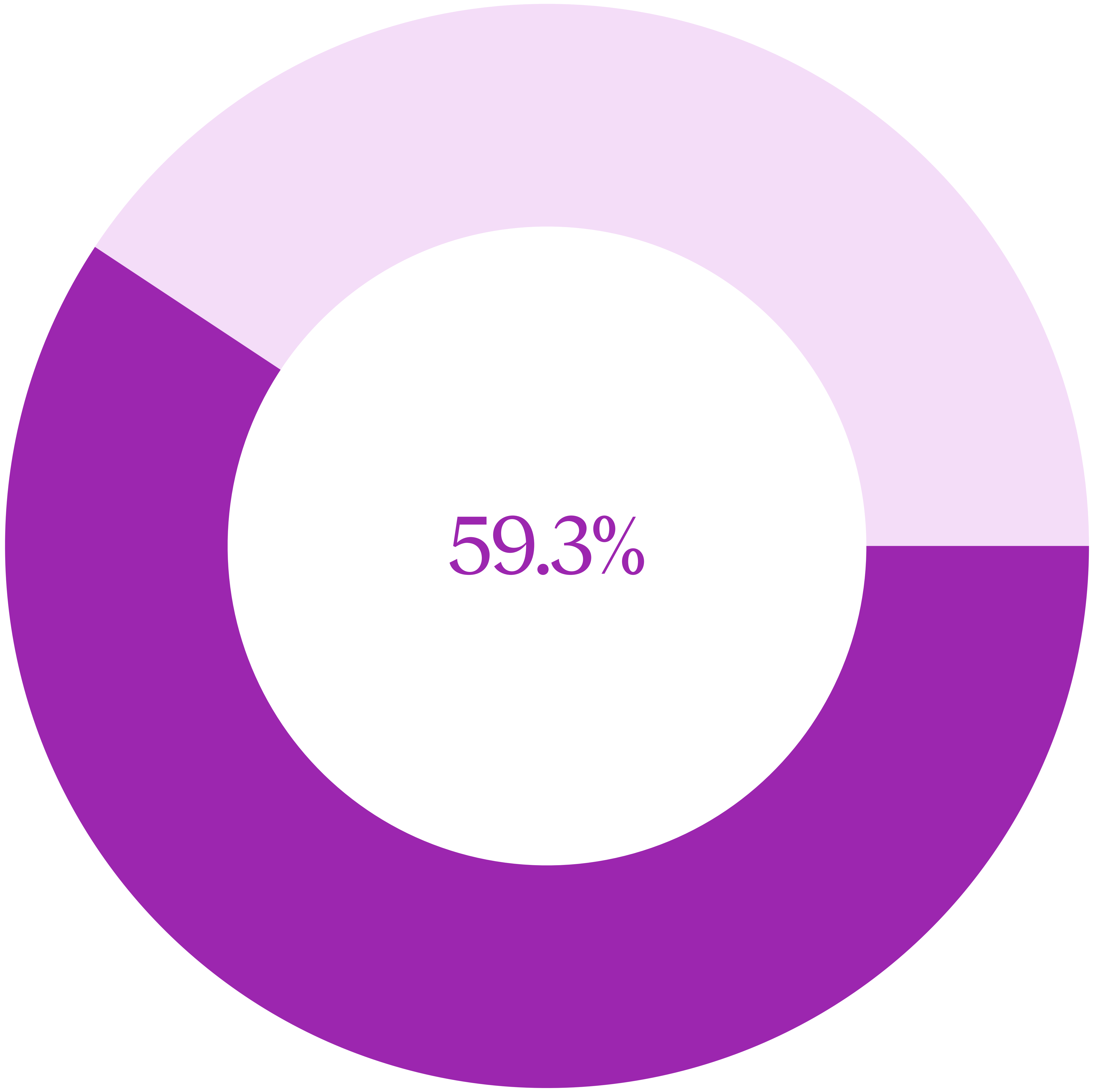
Almost 40% of consumers in Sweden chose an eco-labeled shipping method when presented with at least one option at checkout like Nordic Swan Ecolabel or ‘fossil-free’.



DELIVERY PREFERENCES

Free shipping

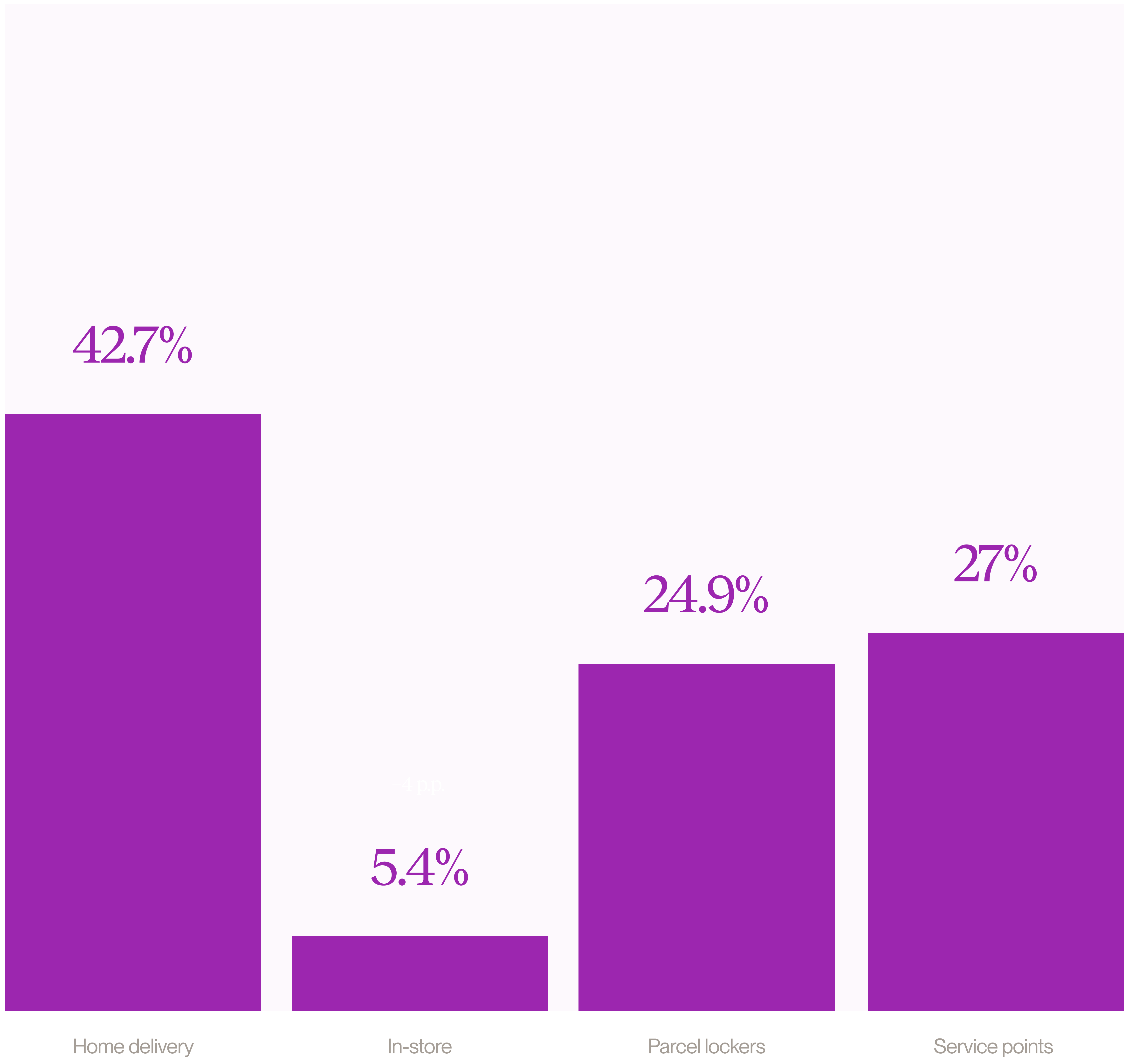
Four in ten orders come with a shipping fee — that's about a 2 percentage point decrease compared to 2024. Retailers get strategic with free shipping thresholds while offering premium options like express or named-day delivery to protect margins during peak season discounting.



DELIVERY PREFERENCES

Share of orders by method

What delivery methods did retailers offer during peak season 2025, and what did consumers actually choose? Home delivery was in the lead, with flexible out-of-home options emerging as the close second choice.



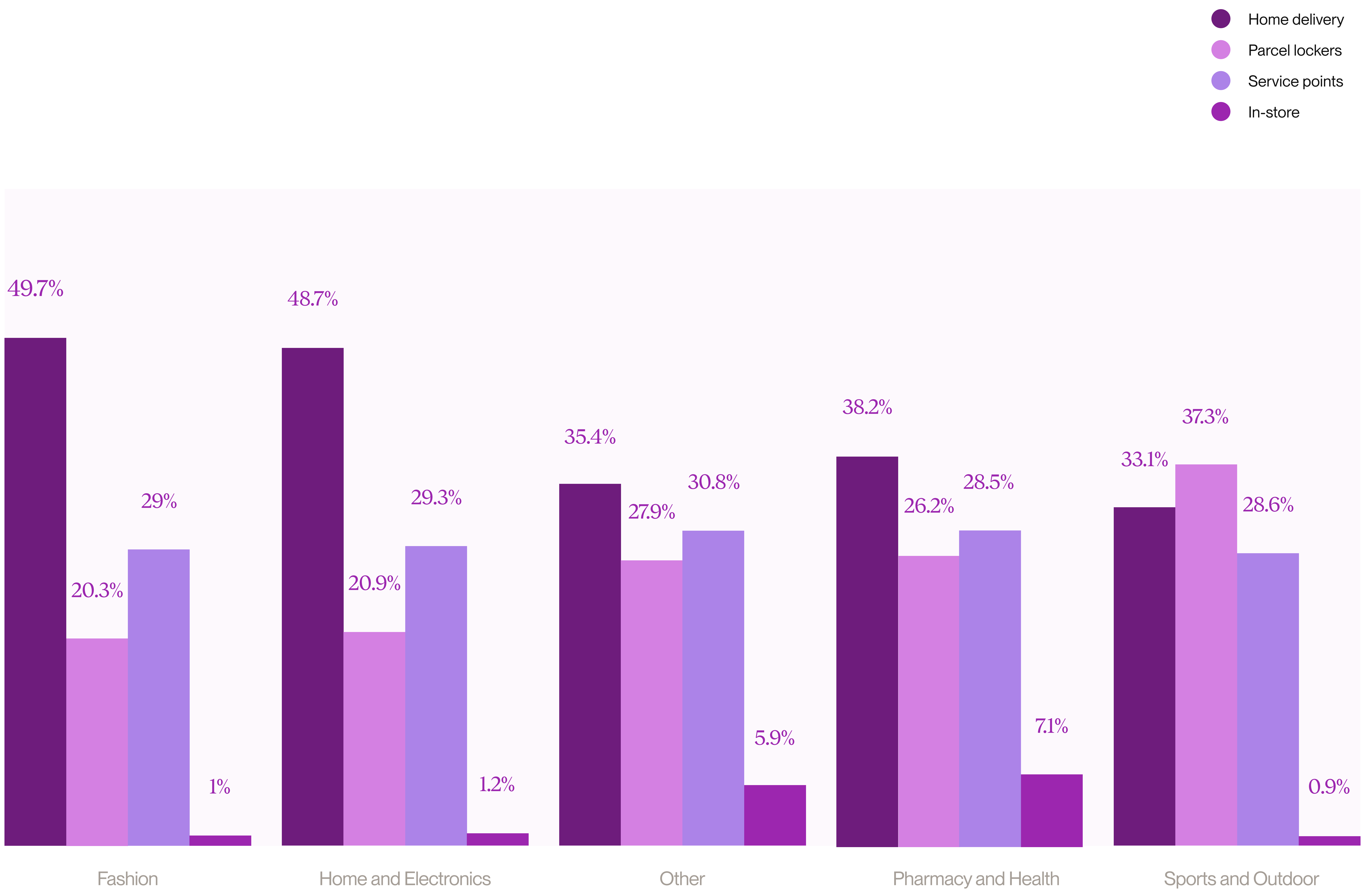
DELIVERY PREFERENCES

Delivery preferences by retail sector

Delivery preferences are based on orders where customers had access to all four delivery options at checkout, each offered at the same price.

Fashion alongside Home and Electronics favored home delivery at nearly 50%, while Sports and Outdoor led in parcel locker adoption at 37%.

In-store pickup remained minimal across categories except Pharmacy and Health at 7% for time-sensitive health products.



*Other categories include Skincare, Cosmetics, Children's Goods, Pet Supplies, and more.

03 Delivery promise

DELIVERY PROMISE

Higher order volumes, longer delivery windows

By adding an extra couple of days to delivery promises during peak season, retailers create a buffer against transit delays. Since 65% of delays happen during carrier transit rather than in warehouses, longer delivery windows help brands absorb capacity issues without breaking customer trust.

Free, white-label fallback delivery options with wider windows also enable retailers to tap into available carrier capacity at better rates while keeping premium services like express or time-slot delivery for customers who want speed and more personalization.

DELIVERY PROMISE

Average delivery promise

Throughout Black Week 2025, the average, consumer-facing delivery promise stretched from 2.7-5.6 days on Monday to 3.8-6.6 days on Sunday as volume increased, weekend approached, and retailers added buffer time

This mirrors 2024, when delivery promises gradually lengthened from Black Monday through Saturday, ranging between 3.3 and 5.7 days.

3.2 — 6.2 days

Average delivery promise during regular weeks

2.7 — 5.6 days

Average delivery promise on Monday, Nov 24

3.8 — 6.6 days

Average delivery promise on Sunday, Nov 30

DELIVERY PROMISE

Late deliveries

Peak season pressure shows. Late deliveries hit 31% during Black Week 2023 compared to an 18.5% benchmark during regular sales periods. In 2024, that figure improved to 22% for orders placed between Black Monday and Thursday.

The full impact of this year's Black Friday peak won't be clear until later, but retailers will likely continue extending delivery windows and refining promise accuracy.

31%

Post-BFCM 2023

19%

vs. a regular week

26%

Post-BFCM 2024

14%

vs. a regular week

04 Market spotlight

MARKET SPOTLIGHT

Scandinavia, the UK and the Netherlands

Shipping economics patterns reveal strategic differences in how markets monetize delivery.

Sweden led with 64% free shipping despite having the lowest average cart value, with the Netherlands close behind at 58%.

Norway and the UK showed higher cart values but lower free shipping rates at 55% and 50% respectively. Denmark had the lowest free shipping rate at 46%.

Shipping revenue including orders with free delivery fell to €1.6 in Sweden up to €3.2 in Denmark.

When customers did pay for shipping, adjusted shipping revenue stayed relatively consistent across markets between €4.5 and €6.1.

Free delivery strategies directly impact revenue capture, especially during peak seasons.

When products carry steep discounts, shipping price sensitivity isn't the same — a €15 delivery fee feels lighter against €200 in savings on a customer's side.

It's an opportunity for brands to increase free delivery thresholds during peak season without damaging conversion rates.

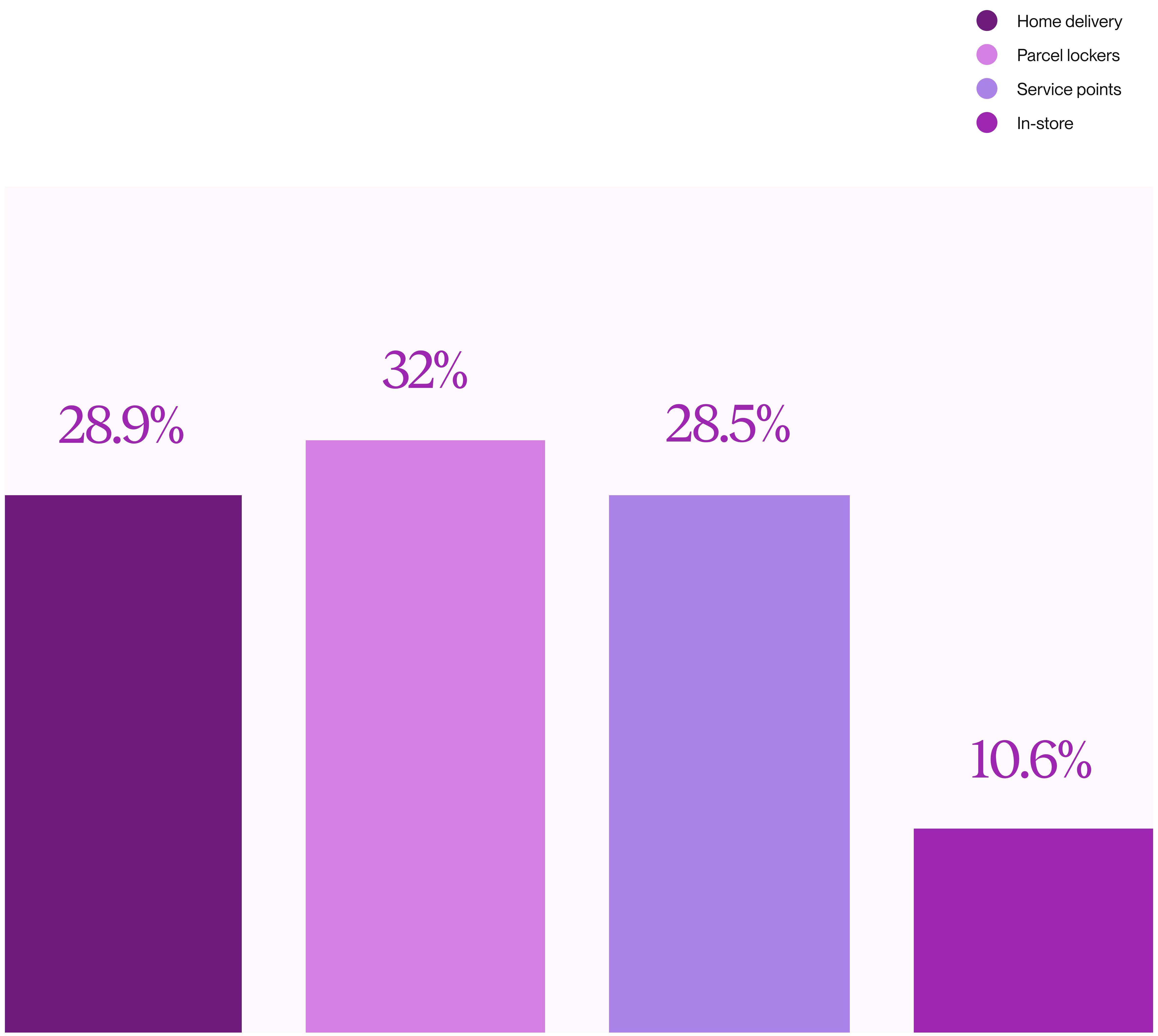
Next, delivery option preferences split into distinct patterns. Nordic countries showed balanced distribution across all delivery methods.

In Sweden and Norway, parcel lockers and service points collectively captured over 60% of orders, with home delivery under 31%.

The UK takes the opposite approach at 81% home delivery, while Denmark (62%) and the Netherlands (63%) fell somewhere between — they favored home delivery with a moderate pickup method adoption.

MARKET SPOTLIGHT

Sweden



98.6

Average cart value (EUR)

64.2%

Orders with free shipping

1.6

Average shipping revenue (including free shipping, EUR)

4.5

Adjusted average shipping revenue (excluding free shipping, EUR)

Top carriers by order volume

PostNord
Instabox
Budbee
Early Bird
DB Schenker

*Based on orders made from Sweden.

MARKET SPOTLIGHT

Norway

123.7

Average cart value (EUR)

49.5%

Orders with free shipping

2.9

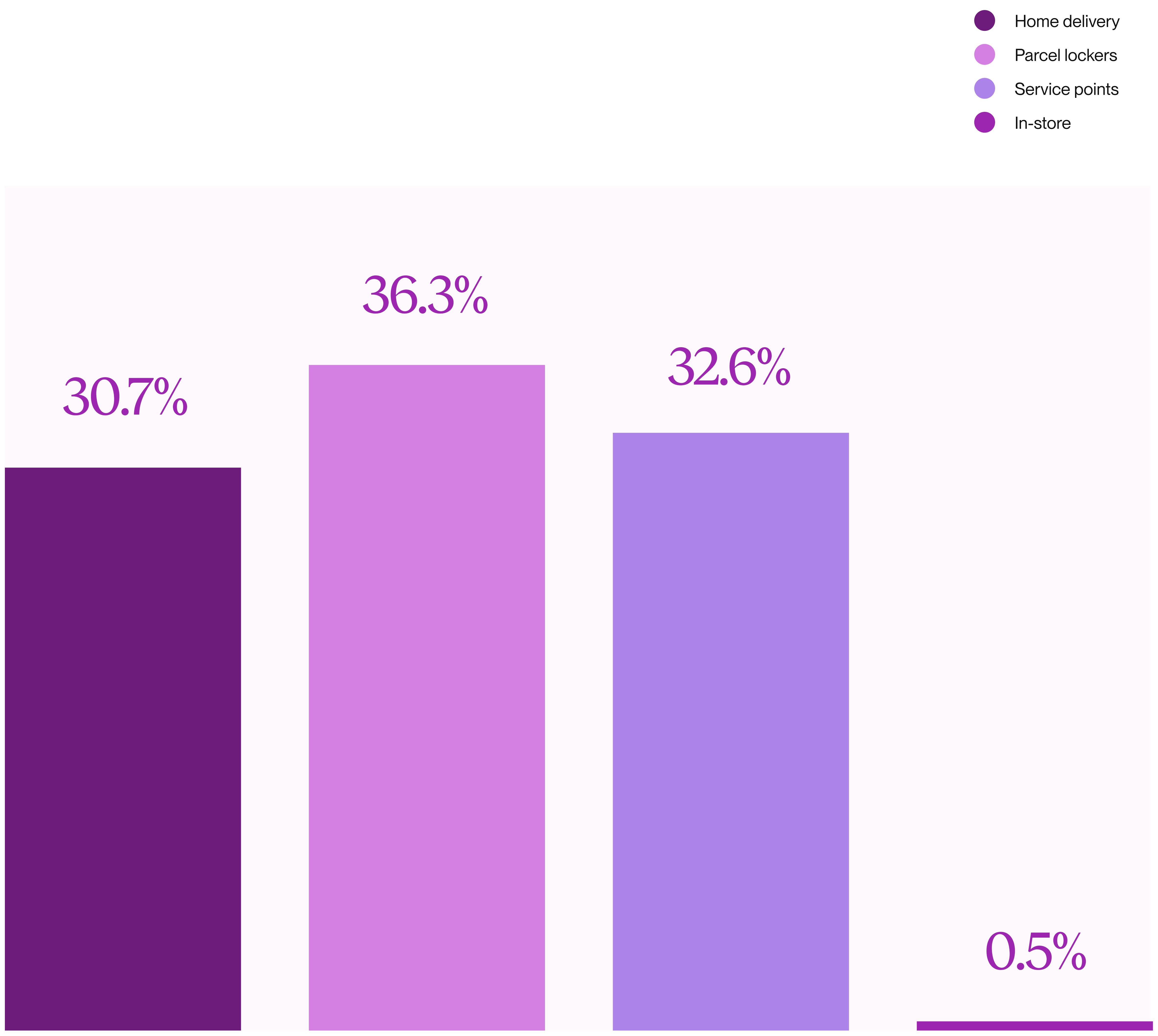
Average shipping revenue (including free shipping, EUR)

5.8

Adjusted average shipping revenue (excluding free shipping, EUR)

Top carriers by order volume

Bring
Helthjem
PostNord
Instabox
Porterbuddy



*Based on orders made from Norway.

MARKET SPOTLIGHT

Denmark

Home delivery
Parcel lockers
Service points
In-store

99

Average cart value (EUR)

46.2%

Orders with free shipping

3.2

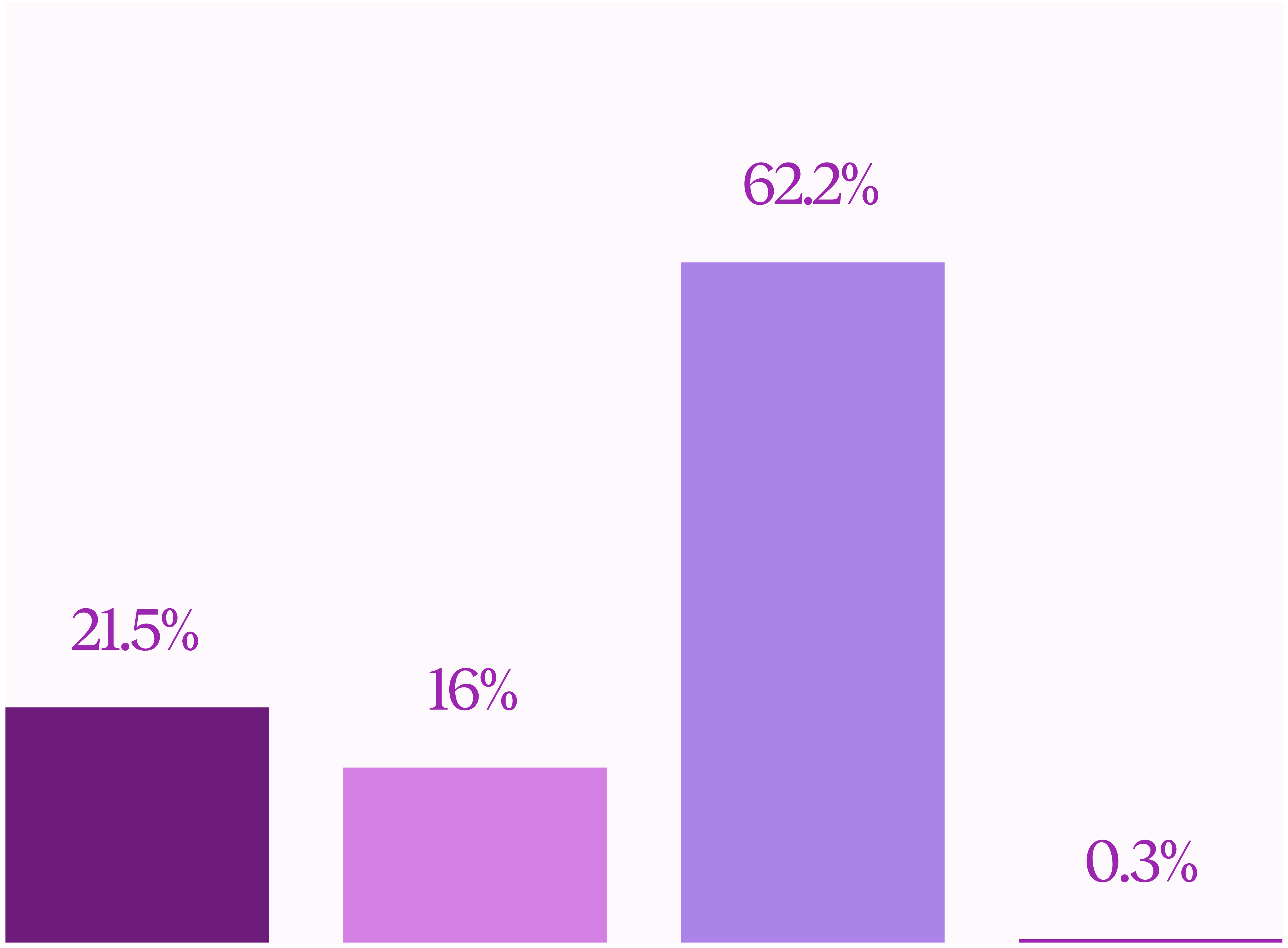
Average shipping revenue (including free shipping, EUR)

6

Adjusted average shipping revenue (excluding free shipping, EUR)

Top carriers by order volume

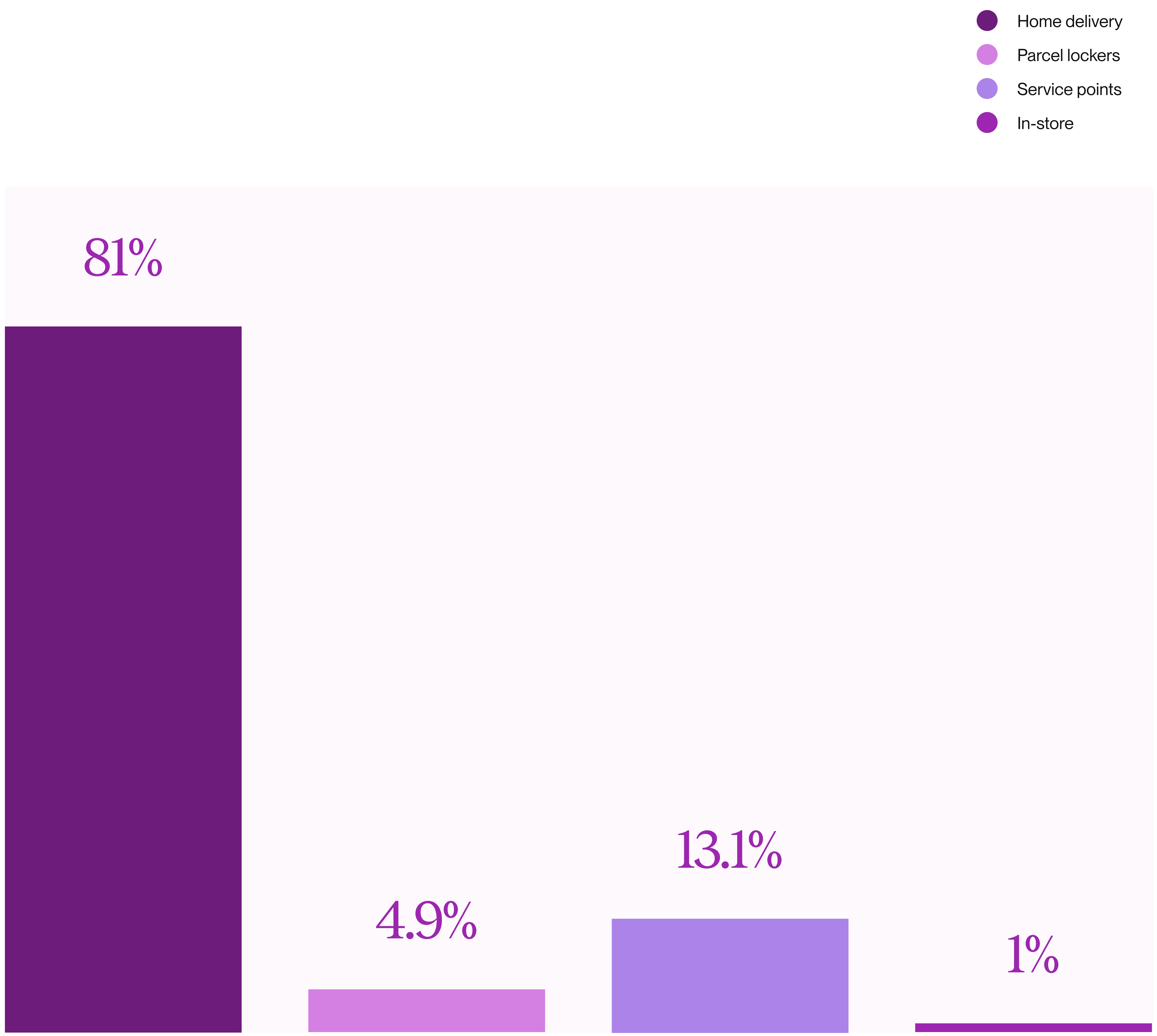
PostNord
Bring
GLS Track & Trace
Budbee
Instabox



*Based on orders made from Denmark.

MARKET SPOTLIGHT

United Kingdom



151.2

Average cart value (EUR)

54.9%

Orders with free shipping

2.8

Average shipping revenue (including free shipping, EUR)

6.1

Adjusted average shipping revenue (excluding free shipping, EUR)

Top carriers by order volume

Evri
Royal Mail
DPD UK
InPost
UPS

*Based on orders made from the UK.

MARKET SPOTLIGHT

Netherlands

138.8
Average cart value (EUR)

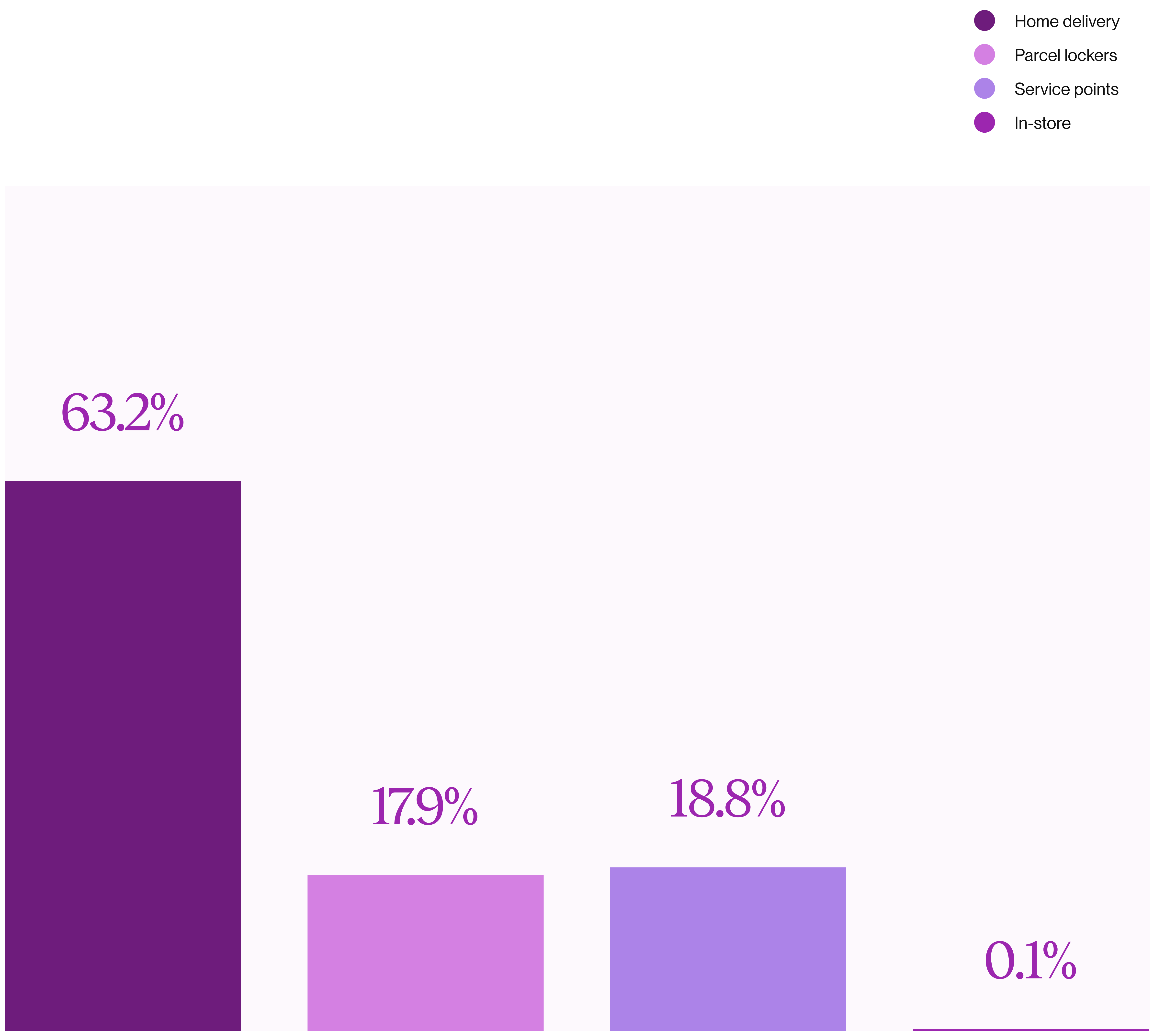
57.5%
Orders with free shipping

2
Average shipping revenue (including free shipping, EUR)

4.8
Adjusted average shipping revenue (excluding free shipping, EUR)

Top carriers by order volume

DHL eCommerce Europe
DHL
Budbee
UPS
PostNL



*Based on orders made from the Netherlands.

Deliveries that fit people's lives

Ingrid makes delivery a competitive advantage, not just a cost. We help retailers optimize delivery options at checkout, grow conversion and shipping revenue, and streamline returns.

Discover more at ingrid.com

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