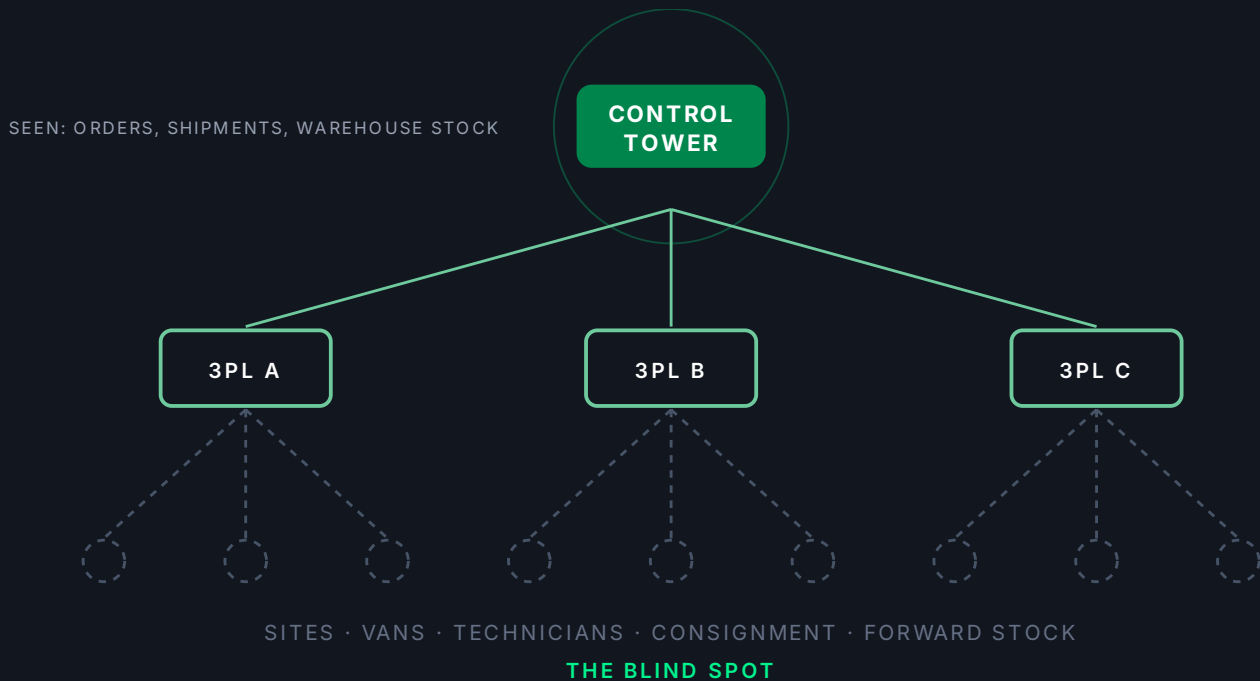




A GUIDE FOR 4PLS AND LEAD LOGISTICS PROVIDERS

The Control Tower Blind Spot

Visibility beyond the warehouse, across every 3PL

Your control tower sees the order, the truck and the pallet in the warehouse. Then the stock moves to a site, a van or a technician, and the screen goes quiet. This guide shows where that happens, what it costs your clients, and how a 4PL can close the gap.

For solution design, control tower and innovation leaders at
4PLs · Lead logistics providers · Supply chain orchestrators

Field Inventory Management.
Anytime. Anywhere.

EXECUTIVE SUMMARY

A 4PL owns the outcome. Not the stock.

That is the strength of the model. It is also its weak spot. A 4PL is accountable for a supply chain it does not run, across 3PLs and carriers it does not own.

Shippers are buying that model. In a Gartner survey, **42% of supply chain leaders already outsource to a 4PL and a further 35% plan to within two years.**² In December 2025 Gartner published its first Magic Quadrant for the category.¹

Control towers are the core of the offer. They are very good at orders and shipments. They see warehouse stock through each 3PL's WMS.

They rarely see what happens next. Consigned stock at a hospital. Spare parts in an engineer's van. Site stock at a wind farm or a substation. Forward stock with a technician. That is where the shipper's money and service risk sit.

Ventory's own research among 312 3PL professionals shows the gap. **Inventory accuracy is 99% in the warehouse and 63% at field stock locations.**⁷ 71% track field stock with phone, email and spreadsheets only.⁷

This guide makes the case that the next layer of 4PL value sits beyond the warehouse. It shows where stock goes dark, what that costs, and how a 4PL can give each client one live stock view across all of its 3PLs, without building software.

42%

of supply chain leaders already outsource to a 4PL. 35% more plan to.

Gartner survey²

63%

field inventory accuracy at 3PLs, against 99% in the warehouse.

Ventory 3PL Gap Report 2026⁷

73%

of 3PLs sent emergency freight for stock they already owned.

Ventory 3PL Gap Report 2026⁷

14%

of 3PLs run a dedicated field inventory platform.

Ventory 3PL Gap Report 2026⁷

Inside this guide

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01 THE 4PL MOMENT

Shippers are handing over the orchestration.

The 4PL idea is thirty years old. It only became a mainstream buying decision recently.

Accenture, then Andersen Consulting, coined the term in 1996. It described an integrator that assembles the resources, capabilities and technology of several organisations to design, build and run a complete supply chain solution.⁴

Gartner's current definition is close: a supply chain services provider that manages the design, build, run, measurement and orchestration of all or part of an end-to-end logistics network.²

Gartner analysts sum up the difference in one line: **"If you think of 3PL as the logistics muscle, then 4PL is the logistics brain."**³

Why now

Networks got fragmented. Gartner research reports that some global shippers coordinate up to 25 different 3PL relationships, and that nearly 60% of organisations plan to consolidate to fewer logistics providers within two years.³

Consolidation does not mean one provider does everything. It usually means one party orchestrates and several execute. That party is the 4PL.

Supply chain leaders and 4PL outsourcing

Already outsource to a 4PL



Plan to within two years



0%

100%

Gartner survey of nearly 220 supply chain leaders, as quoted on 1 December 2025.²

A CATEGORY COMES OF AGE

In December 2025 Gartner published its first Magic Quadrant for fourth-party logistics. Several of the Leaders are European.¹

Buyers now compare 4PLs on a common grid. The question is what will set one apart from the next.

WHAT SHIPPERS EXPECT

In the 2026 Third-Party Logistics Study, 90% of shippers called technology capabilities critical when choosing a provider, and 61% of 3PLs ranked end-to-end visibility as a top priority.¹¹

02 WHAT A CONTROL TOWER SEES

The screen goes quiet after the warehouse.

Gartner describes a control tower as people, processes, data, organisation and technology combined to improve visibility, control and decision-making.⁵ In practice, most of that visibility follows the shipment.

Public descriptions of lead logistics services lean on the same words: transport flows, shipments, track and trace, warehouse feeds. That is what the data allows. Carriers send status events. 3PLs send WMS stock.

Once stock leaves a 3PL warehouse for a customer site, a van or a technician, nobody sends anything. The item is "delivered". From the control tower's point of view, the job is done.

From the shipper's point of view, it has just started. A consigned implant in a hospital is still the shipper's asset. A spare part in a van is still on its balance sheet. A pump at a site is still on its books until it is installed.

Upstream visibility has the same shape. In McKinsey's 2024 survey, 60% of supply chain leaders reported comprehensive visibility of their tier-one suppliers. Good visibility of deeper tiers fell for the second year in a row.⁶ Visibility is strong where data is easy and weak one step further.

Who sees what, in a typical multi-3PL network

LOCATION	USUALLY TRACKED BY	CONTROL TOWER VIEW
Purchase order, in transit	TMS, carrier events	Live
3PL warehouse	Each 3PL's WMS	Feed, per 3PL
Forward stocking location	WMS or spreadsheet	Partial
Customer site, consignment	Phone, email, spreadsheet	Dark
Engineer van, technician	Memory, paper	Dark
Project or field site	Paper, photos	Dark

Ventory's view, based on customer projects and the 3PL Gap Report 2026.⁷ Not a survey result.

The accountability gap

The client holds the 4PL responsible for service levels and stock. The 4PL's tools stop at the warehouse door. When a site runs out of a part that sits in a van ten miles away, the 4PL gets the call and has no screen to look at.

Three questions for your next client review

QUESTION 1

How much of this client's stock sits outside a 3PL warehouse right now?

QUESTION 2

Who records a movement when a technician takes a part from a van?

QUESTION 3

Could we answer "where is my stock?" for one site in under five minutes?

03 WHERE STOCK GOES DARK

99% in the warehouse. 63% in the field.

Ventory surveyed 312 professionals at 3PLs across EMEA, North America and APAC. The same companies, the same products. Only the location changes.⁷

Inventory accuracy at 3PLs

In the warehouse



At field stock locations



Ventory 3PL Field Inventory Digitization Gap Report 2026, n=312.⁷

How 3PLs confirm field stock today (multiple answers)

Phone calls or email	49%
Shared spreadsheets	46%
WMS extension	31%
ERP field module	27%
Dedicated field inventory platform	14%

Same source.⁷

71%

rely only on phone, email and spreadsheets for field stock.

18%

are very confident in their field inventory data.

73%

sent emergency freight in the past year for stock they could not locate.

62%

had an SLA breach caused by a field stock error.

All four: Ventory 3PL Gap Report 2026, n=312.⁷

WHAT IT MEANS FOR A 4PL

Multiply this by the number of 3PLs in one client's network. Each one keeps field stock its own way. None of them sends it to the control tower.

The emergency shipment, the SLA breach and the double purchase land on the client. The question "why didn't you see it?" lands on the 4PL.

STOCK YOU CANNOT SEE, YOU BUY TWICE

66% of 3PLs in the same survey found systematic overstocking at field locations.⁷

04 SECTOR LENS

Four sectors where the blind spot costs most.

In these sectors a large share of the shipper's stock lives outside any warehouse by design. That is where a 4PL can add the most.

MEDTECH AND DIAGNOSTICS**Consigned implants, loaner kits, trunk stock.**

Medtech companies typically carry three times more inventory than consumer goods and electronics companies, and McKinsey sees room to cut it by 10 to 30%.⁸ Much of it sits in hospital consignment and with sales reps.

Where Ventory fits: consigned stock per hospital, expiry dates, usage and replenishment, scanned by the people who move it.

FIELD SERVICE**Engineer vans and forward stocking locations.**

In Aberdeen research (2013), 51% of service organisations named missing or wrong parts as a cause of repeat visits. Best-in-class teams had the right part in the van 58% of the time, against 45% for the rest.⁹

Where Ventory fits: live van and locker stock, transfers between engineers, minimum levels per location.

ENERGY AND UTILITIES**Site stock at wind farms, solar parks, substations.**

Spare parts are shipped to remote sites and installation projects, often with no connection on site. Stock is counted when someone has time, not when it moves.

Where Ventory fits: offline scanning at the site, serial-level tracking, one view across contractors and 3PLs.

DEFENCE AND CRITICAL INFRASTRUCTURE**Depots, bases, vehicles and deployed units.**

The US Government Accountability Office reported in March 2026 that the Army and Air Force missed their mission capable goals in fiscal year 2024 for 25 of 27 aircraft. All 18 ground vehicles it reviewed faced challenges linked to a lack of parts and materiel.¹⁰

Where Ventory fits: stock per base and vehicle, signed hand-overs, audit trail, offline use. ISO 27001 certified, SOC 2 compliant.

THE COMMON THREAD

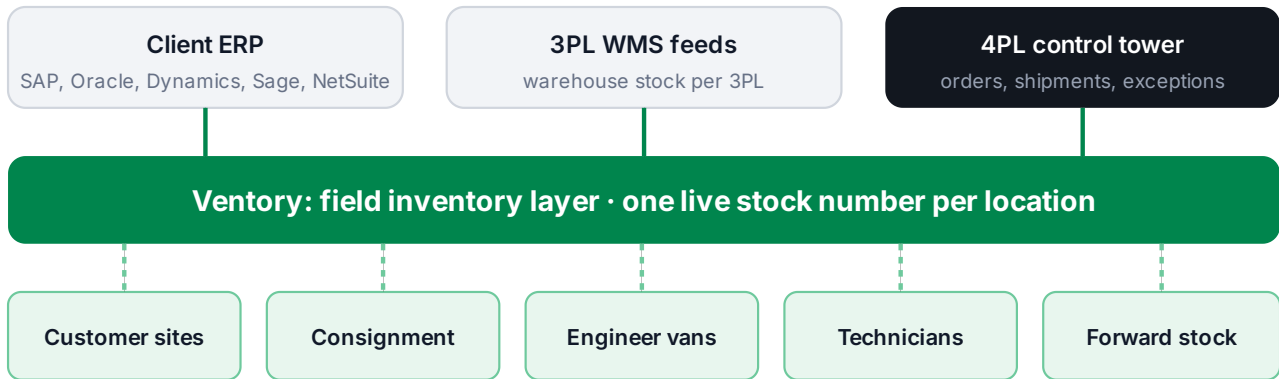
The client already pays for this stock. Nobody is paid to see it.

In each sector the warehouse is only the first stop. The 4PL that can report one live number per site, van and technician gives the client something no single 3PL can: a view across all of them.

05 THE FIELD INVENTORY LAYER

One stock view across every 3PL.

The answer is not another control tower, and not a new WMS for every 3PL. It is a thin layer that records stock where it actually moves and feeds one view.



How it works

- **Capture at the point of movement.** 3PL staff, engineers and site teams scan issues, transfers, returns and counts in a mobile app on iOS or Android.
- **Works without a signal.** The app keeps working offline and syncs when the connection returns.
- **One record per location.** Every site, van, locker and consignment shelf is a stock location with its own minimum levels and alerts.
- **Connected to the ERP.** Movements flow back to the client's ERP, so the financial record matches the shelf.
- **Feeds the control tower.** The 4PL sees field stock next to the shipments it already tracks.

What Ventory customers report

99.76%

rolling stock accuracy

+70%

reduction in stockouts

+35%

excess stock reduction

+30%

productivity

Ventory customer results as published on ventory.io. ¹²

BUILT FOR ENTERPRISE NETWORKS

Live in 4-8 weeks. ISO 27001 certified, SOC 2 compliant, GDPR compliant. Role-based access per location and a full audit trail of every scan.

06 PROOF

Three 3PLs. One shipper. One platform.

The multi-3PL set-up already exists. We built it from the 3PL side, one provider at a time.

CUSTOMER STORY · GLOBAL CONSUMER-GOODS COMPANY

3

different 3PLs working on Ventory for the same shipper

~50,000

pallets processed since March

1

platform for all three providers

We got there from the 3PL side, one provider at a time. Today all three run on the same platform for the same global consumer-goods company. Names are withheld.

What this tells a 4PL

The hard part of multi-3PL visibility is not the software. It is getting every provider to record stock the same way. Here it happened one 3PL at a time.

A 4PL can do the same thing in one move. It already sits above every 3PL in the client's network. It sets the standards, the KPIs and the reporting. Adding a common field inventory layer is one more standard.

What changes for the client

- One stock number per location, whichever 3PL runs it.
- The same scan, count and transfer process at every provider.
- Comparable accuracy per 3PL and per site, so performance reviews use one source.
- Stock beyond the warehouse in the same view: sites, vans, technicians.

INDUSTRIES ALREADY ON VENTORY

Medtech and diagnostics, renewable energy, field services and 3PL. Trusted by a national ambulance service, a global 3PL and a global consumer-goods company.

07 THE 4PL PLAYBOOK

Five moves in 90 days.

Start with one client and a focused scope. Prove the number, then roll it out across the network.

1	Pick one client with stock beyond the warehouse. A medtech client with consignment, a field service client with vans, an energy client with site stock. Choose one where a stockout has a name and a cost.	GOOD LOOKS LIKE A named client, a named sponsor, a known pain.
2	Map every place that holds stock. Warehouses per 3PL, forward stocking locations, sites, vans, technicians. Give each location an owner.	GOOD LOOKS LIKE One list of locations, agreed with the client.
3	Connect the client's ERP once. Items, serials and lots come from the ERP. Movements flow back. No change to any 3PL's WMS.	GOOD LOOKS LIKE The ERP and the field agree on the same item master.
4	Scan at the point of movement. Put issues, transfers, returns and counts on a mobile app at every 3PL and field team in scope. Retire the spreadsheet, not the people.	GOOD LOOKS LIKE Every movement recorded by the person who makes it.
5	Report one number per location, then scale. Measure accuracy per site and per 3PL every week. Take the result into the client review, then to the next client.	GOOD LOOKS LIKE A field accuracy KPI in the monthly business review.

Self-check for 4PL solution designers

1	Can we show a client its stock at sites, in vans and with technicians today?	☐ Yes ☐ No
2	Do all 3PLs in one client network record field movements the same way?	☐ Yes ☐ No
3	Do we report field inventory accuracy per location as a KPI?	☐ Yes ☐ No
4	Can field teams record stock without a network connection?	☐ Yes ☐ No
5	Did a client pay for emergency freight on stock it already owned this year?	☐ No ☐ Yes
6	Is "visibility beyond the warehouse" part of our next tender response?	☐ Yes ☐ No

Three or more answers in the right-hand column: the blind spot is real for your clients, and it is an opening for your next proposal.

08 WORKING WITH VENTORY

Add the layer. Keep the relationship.

A 4PL owns the client relationship and the design. Ventory runs the platform underneath. The client gets one stock view across every 3PL.

STEP 1
Discovery

A 30-minute call on your model, your clients and where their stock sits beyond the warehouse.

STEP 2
Demo on a real scenario

We show Ventory on one of your client scenarios, with your solution designer in the room.

STEP 3
Focused-scope deployment

One client, one set of locations, one ERP connection. Live in 4-8 weeks. Then scale.

What the 4PL brings

- The client relationship and the solution design.
- The standards every 3PL in the network works to.
- The control tower and the reporting to the client.

What Ventory brings

- The field inventory platform and mobile apps.
- ERP integration with SAP, Oracle, Dynamics, Sage and NetSuite.
- Onboarding of 3PL and field teams, and support.
- Security: ISO 27001, SOC 2, GDPR.

IS THIS FOR YOU?

One question decides it.

Do you own inventory visibility beyond the warehouse for your clients? Consigned stock, site stock, spare parts with technicians.

If yes, or if your clients are asking for it, we should talk. Bring one client scenario. We will show you how it runs across every 3PL in that network.

ABOUT VENTORY

Ventory gives leaders total control and visibility of inventory, anywhere, anytime. It is the field inventory layer between ERP and field teams, used in medtech, renewable energy, field services and 3PL. Ventory BV, Zaventem, Belgium.

SOURCES

Where the numbers come from.

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- 3 **Gartner**, 3PL & 4PL: How to Combine for the Best Logistics Outsourcing Model, February 2026, as cited in SupplyChainBrain, "The hidden cost of 3PL fragmentation", 7 August 2026.
- 4 **Maersk Insights**, The difference between 3PL vs 4PL, 26 September 2023, citing Accenture's 1996 definition. Confirmed by Inbound Logistics, January 2011.
- 5 **Gartner**, What is a supply chain control tower, Supply Chain 24/7, 26 September 2022.
- 6 **McKinsey & Company**, Supply chains: Still vulnerable. Supply Chain Risk Survey 2024, 88 senior supply chain executives, 14 October 2024.
- 7 **Ventory**, The 3PL Field Inventory Digitization Gap Report 2026. 312 validated respondents in EMEA (44%), North America (38%) and APAC (18%), fielded October 2025 to January 2026.
- 8 **McKinsey & Company**, How medtech companies can create value via inventory optimization, 24 January 2025.
- 9 **Aberdeen Group**, Fixing First-Time Fix, March 2013.
- 10 **U.S. Government Accountability Office**, GAO-26-108888, March 2026.
- 11 **NTT DATA, Penske Logistics and Penn State**, 2026 Third-Party Logistics Study (30th edition), released 7 October 2025.
- 12 **Ventory**, customer results as published on ventory.io. Customer story: names withheld.

Notes. Ventory survey percentages are shares of respondents. The "who sees what" table on page 4 is Ventory's view, not a survey result. Third-party findings are summarised; refer to the originals for full context.

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NEXT STEP

See beyond the warehouse. Anytime. Anywhere.

Bring one client scenario to a 30-minute call. We will show you how one stock view runs across every 3PL in that network, on top of the ERP your client already uses.

[Book a call · ventory.io/company/get-in-touch](https://ventory.io/company/get-in-touch)

FOR 4PLS

ventory.io/industry-specific-use-cases/4pl-fourth-party-logistics

3PL

[3PL Field Inventory Digitization Gap Report](#)

BUSINESS CASE

[ROI calculator · ventory.io/resources](#)