



State of Ecommerce Fulfillment Report 2026

PATTERN.COM

Fulfillment is now central to ecommerce performance, but it is also becoming more complex and costly to manage. Rising marketplace fees, inventory volatility, international expansion, and tariff pressure are forcing brands to rethink how they move products, allocate inventory, and protect margin across channels.

Based on survey responses from **65 North America-based operations leaders in Q1 2026**, this report examines how brands are responding to those shifts in real time. From Amazon placement fees and stockouts to 3PL performance and cross-border complexity, the findings reveal where operators are under pressure, where they are adapting, and which priorities are shaping fulfillment strategy in 2026.

For brands selling across Amazon, Walmart, TikTok Shop, and DTC, this report offers a practical benchmark for navigating a more fragmented and operationally demanding ecommerce landscape.

Key findings at a glance

80%

Still selling on Amazon

↓ from 98% in 2025

75%

**Hit by Amazon
placement fees**

↑ from 66% in 2025

70/100

**Avg. 3PL
satisfaction score**

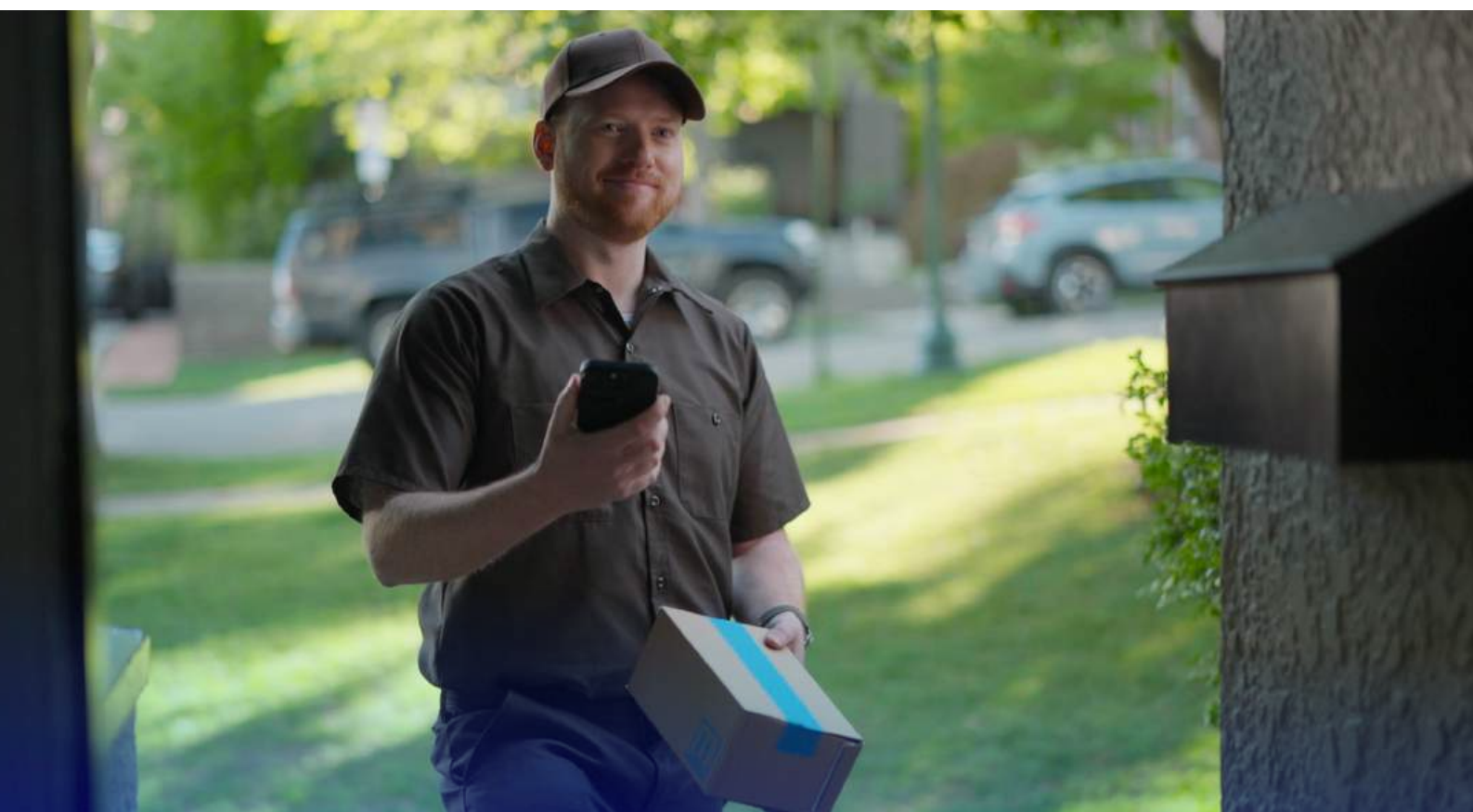


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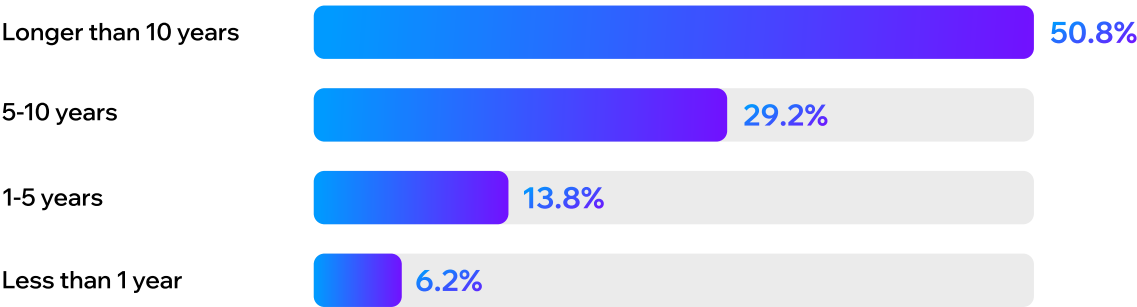
Survey respondent overview

Pattern surveyed 65 North America-based operations leaders in March 2026 for the State of Ecommerce Fulfillment Report.

Respondents reflect a diverse mix of product categories, years of experience, and channel exposure across Amazon, Walmart, TikTok Shop, and international markets.

Experience in fulfillment & logistics

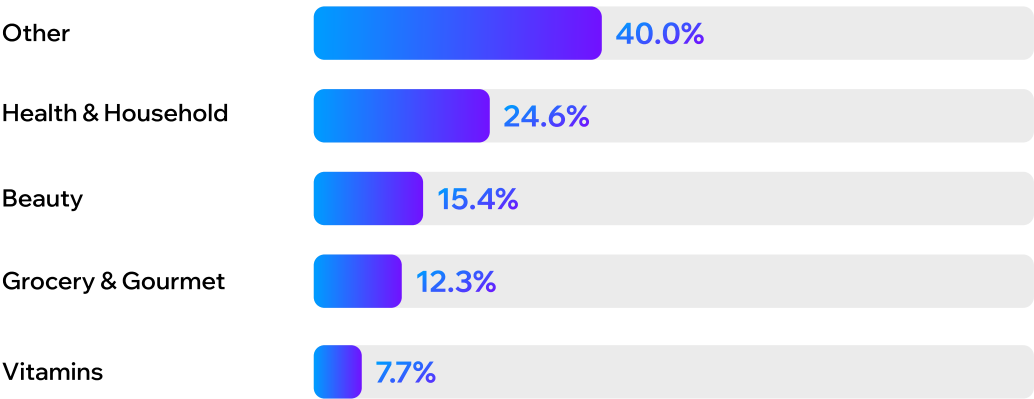
% of respondents by years of experience



80% of respondents have 5+ years in the field, representing a respondent base with significant fulfillment and logistics experience.

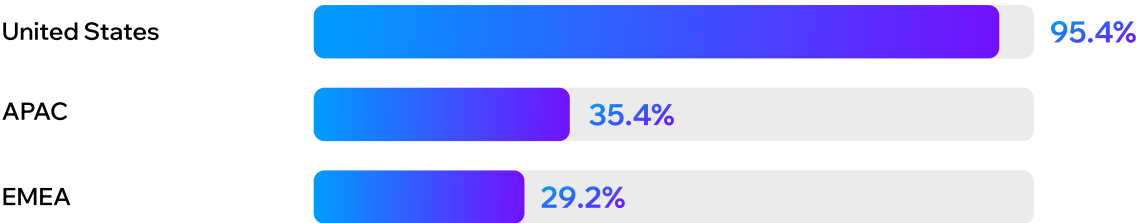
Product Category Mix

% of respondents by product category



Where Brands Are Selling

% of respondents selling in each region



+89%

**Surge in APAC
selling since 2025**

APAC selling jumped from 19% to 35.4% year over year, making it the largest geographic shift across both surveys. International fulfillment is no longer a future consideration. It is now an active operational priority for a growing share of brands. EMEA followed a similar pattern, rising from 19% to 29%.



Fulfillment across the top three marketplaces

Amazon, Walmart.com, and TikTok Shop each present a distinct set of fulfillment pressures. The sections below show how brands are navigating cost, stock availability, shipping models, and operational complexity on each platform.

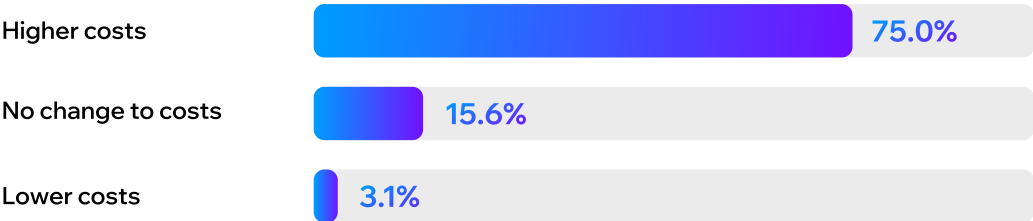
amazon

Amazon remains the dominant marketplace for ecommerce sellers, though its share declined again from **98% in 2025 to 80% in 2026**. This drop suggests that brands are diversifying in response to Amazon’s rising costs and operational complexity, rather than moving away from the platform altogether.



Impact of Amazon inbound placement fees

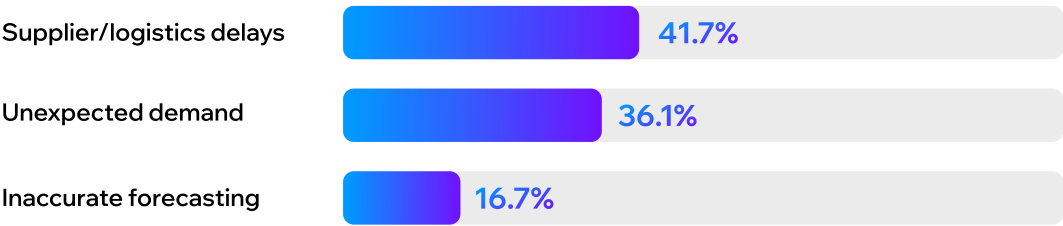
How placement fees have impacted business





Root causes of stockouts on Amazon

Leading cause of out-of-stock increases



Root causes of stockouts on Amazon

Rising fees & cost erosion

Placement fees, FBA fees, and ad costs remain the biggest source of pressure for sellers. Multiple respondents identified rising fees as their top challenge on Amazon.

Seller support & communication

Managing suspensions, compliance documentation, and listing issues without reliable support continues to create significant operational strain.

Unauthorized sellers & grey market

Counterfeit listings, grey market goods, and buy box interference remain ongoing threats to brand integrity and channel control.

Inbound delays & closing shipments

Amazon’s practice of closing shipments at the 90-day mark before ocean freight arrives continues to create disruptions for international sellers.

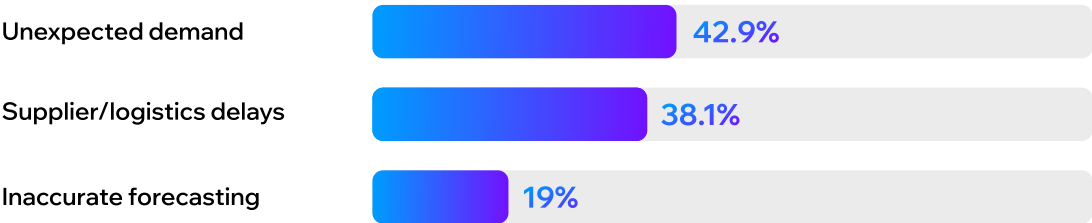


Walmart.com remains a secondary priority for most brands, but adoption continues to grow. **46% of respondents now sell on Walmart.com**, and among those sellers, **61% use Walmart Fulfillment Services (WFS)**.



Root causes of stockouts on Walmart

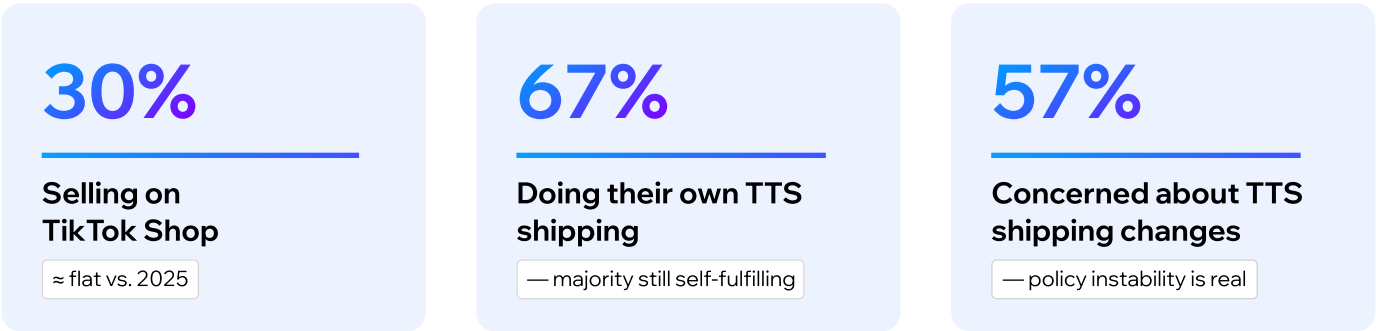
Leading cause of out-of-stock increases





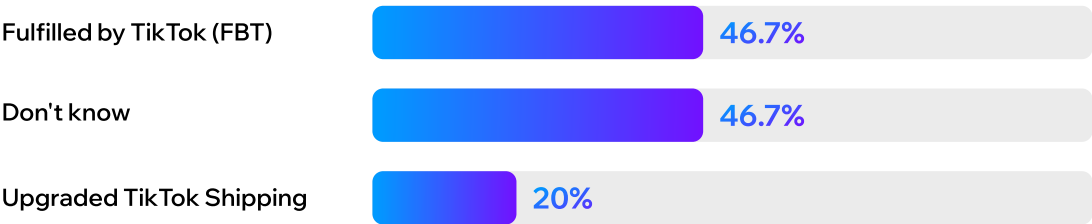
TikTok Shop

TikTok Shop adoption held steady at **30% of respondents**, unchanged from 2025. Within that group, however, the operating environment remains highly unstable. Policy changes, fee confusion, and inconsistent revenue performance are contributing to growing seller fatigue.



TikTok Logistics Options Brands Are Considering

Which TikTok Shop logistics options are you considering? (select all that apply)



The complexity of *cross-channel fulfillment*

Most respondents are selling on more than one platform. The challenges of multi-channel fulfillment are well known, but the 2026 data reveals a sharper divide between brands with mature systems and those still struggling with the fundamentals.

Inventory allocation

Inventory allocation remains one of the toughest cross-channel tradeoffs. Prioritizing one marketplace can create out-of-stock issues and service risk in others.

Too many portals, no single view

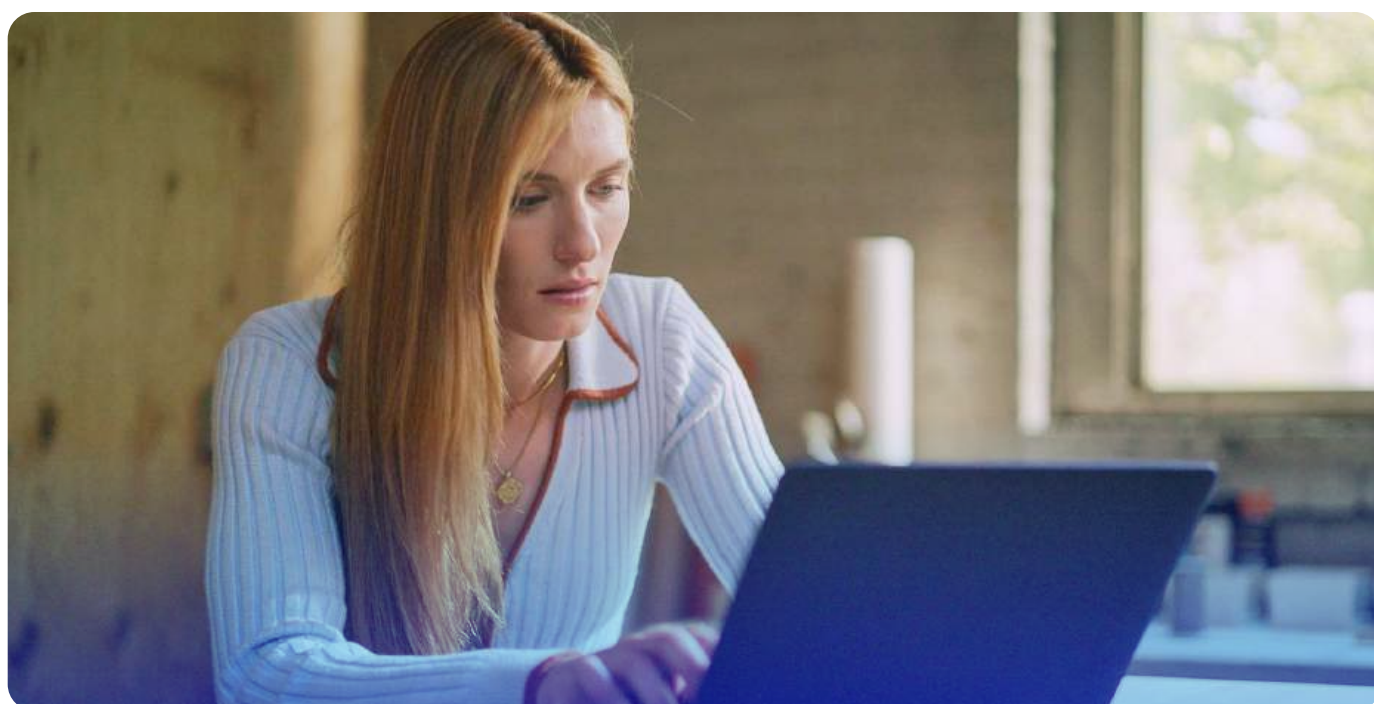
Operational visibility remains fragmented. Respondents cited disconnected systems, multiple portals, and limited ERP integration as ongoing obstacles to effective cross-channel management.

Margin compression

Cross-channel growth is increasing pressure on profitability. Marketplace fees, fulfillment costs, and shipping expenses are making it more difficult for brands to protect margin as they scale.

Warehouse complexity

Multi-channel fulfillment adds operational overhead at the warehouse level. Different prep requirements, labeling standards, and routing rules increase complexity across the network.



Third party fulfillment (3PL) in 2026

More than half of respondents rely on a 3PL, and many are moving beyond a single-provider model. As fulfillment demands grow more complex, brands are expanding their partner networks to gain flexibility, coverage, and channel-specific support. **Satisfaction averages 70 out of 100**, but the wide range of scores suggests that 3PL performance remains highly inconsistent.

52%

Currently use
at least one 3PL

≈ flat vs. 2025

45%

Of 3PL users use more
than one

↑ multi-provider strategies rising

70/100

Avg. 3PL
satisfaction score

— wide variance: 5 to 100

Why brands choose a 3PL

Reasons for using a 3PL — select all that apply

More scalability

66.7%

Cost savings

61.9%

Faster shipping

52.4%

Reduced risk

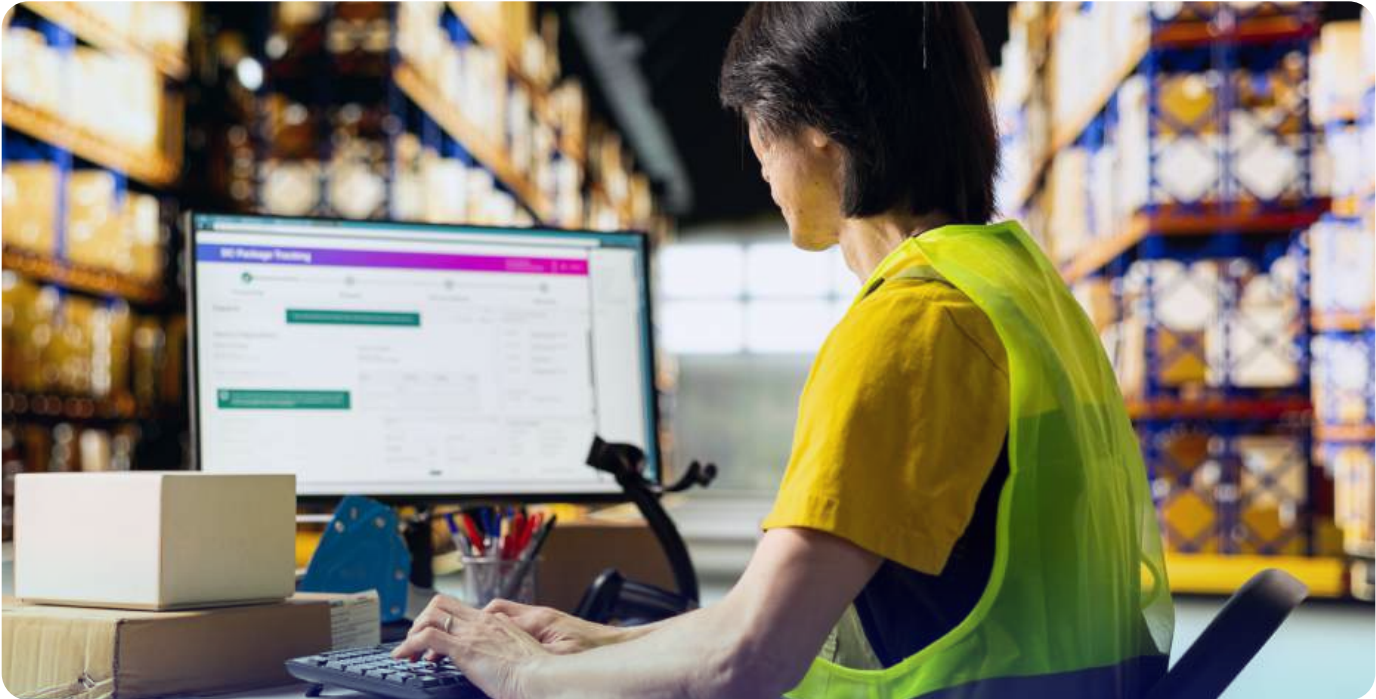
28.6%

What's working

D2C performance, responsiveness, communication, and speed are the top cited 3PL strengths. Several respondents described their 3PL team as "a great team that cares a lot."

What isn't

B2B capabilities lag significantly. Multiple respondents noted error-prone retailer orders, inconsistent SOP adherence, poor EDI integration, and outdated technology.

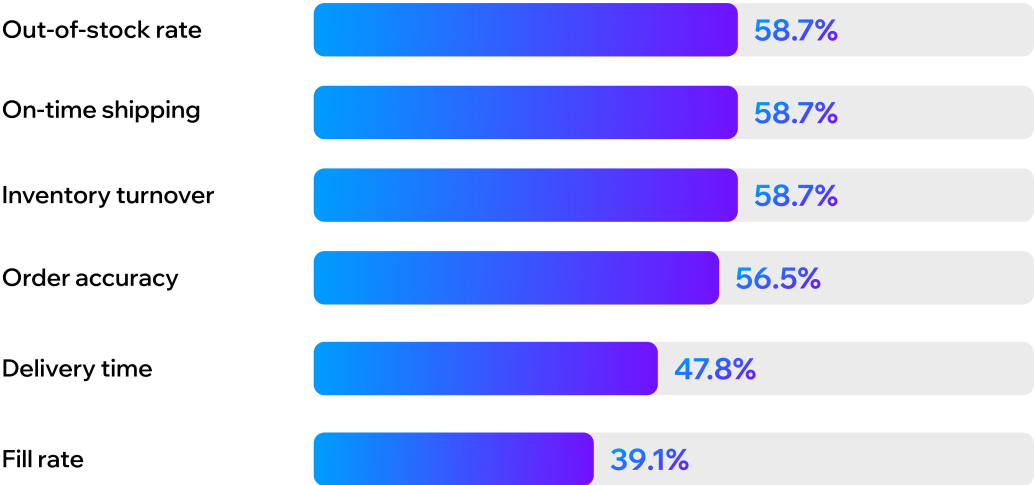


The metrics and risks defining fulfillment in 2026

Metrics tracked regularly

What brands choose to measure often reflects where they feel the most operational pressure. The data below shows which fulfillment metrics respondents track regularly across their businesses.

Reasons for using a 3PL — select all that apply



What keeps leaders awake at night

Rising Costs

Shipping costs, carrier fees, placement fees, and ad spend are putting increasing pressure on margins and operating budgets.

Stockouts & Inventory Availability

Many brands remain concerned about whether inventory will be received and checked in quickly enough to avoid stockouts.

Tariffs & Global Instability

Tariffs, customs fees, and geopolitical uncertainty are adding new layers of risk to fulfillment planning in 2026.

Forecast Accuracy

Higher storage costs are increasing the importance of accurate forecasting, but doing so across large SKU catalogs remains a major challenge.

Goals & objectives for 2026

Brand priorities for 2026 reflect a difficult balancing act. Many are focused on growing revenue while also improving efficiency and reducing costs.

Growth Goals

Double Revenue

DTC Expansion

International Ops

New Retail Doors

Revenue Growth

Ecommerce Scale

Amazon Growth

Market Share

Organizational Goals

1P → 3P Migration

Longer Lead Times

Automation

Tariff Survival

Cost Reduction

Inventory Management

Reduce Shipping Costs

Fee Optimization

Five trends for 2026

While each section of this report highlights specific data points and marketplace dynamics, together they reveal a larger story. The trends below bring those findings together into five shifts shaping fulfillment strategy in 2026.

Trend #01

Fees Are Here to Stay



75% of Amazon sellers now incur placement fees, up from 66%. The brands best positioned to adapt will manage these costs strategically rather than absorb them.

Trend #02

Expansion to New Marketplaces is Bloomin



Amazon adoption fell from 98% to 80% year over year. Brands are diversifying into Walmart, TikTok Shop, and international channels at an increasing pace.

Trend #03

APAC Is the Growth Frontier



APAC selling increased from 19% to 35% in one year. Brands without an APAC fulfillment strategy risk falling behind their peers.

Trend #04

Tariffs are an Ops Problem



Tariffs emerged as a direct driver of stockouts and 2026 planning decisions. Brands are building longer inventory buffers and re-evaluating supply chain geography.

Trend #05

TikTok Shop shows potential, but volatility remains



Despite continued interest in TikTok Shop fulfillment options, policy instability and inconsistent performance are still creating friction for sellers. Brands are evaluating FBT and upgraded shipping, but confidence in the platform remains mixed.

About *Pattern*

Fulfillment built for marketplace scale

Pattern is the global ecommerce accelerator trusted by hundreds of leading brands to manage their marketplace presence end-to-end. With a global network of fulfillment centers across North America, Europe, and Asia-Pacific, Pattern helps brands navigate the exact challenges surfaced in this report: **Amazon placement fee avoidance, multi-marketplace inventory allocation, and international fulfillment complexity.**

Pattern's fulfillment infrastructure is built to support the full supply chain journey, from factory to consumer, with the speed, compliance, and data visibility modern marketplace selling demands.





Want to discover what an
ecommerce accelerator can do for you?

Let's get in touch.

[**Learn more**](#)

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