fielo



REPORT

The B2B Reorder Gap

Why Commerce Cloud buyers don't come back, and how to close the gap. Market data and a first program for B2B commerce leaders on Salesforce.

Dispatches from the front

Most B2B companies have done the hard part. The storefront is live, the catalog is clean, prices are right, and buyers have placed their first order online. Then many of them go back to email, the phone and their rep.

We call that drop the **B2B Reorder Gap**: the space between a buyer's first online order and the second. This report brings together what more than 3,500 B2B professionals, from buyers to manufacturers and distributors, told researchers in three 2025 surveys.

It shows why the gap matters now, the five places it usually opens, and how to find where it opens in your business, with a short online self-assessment.

Three things stand out in the research:

1

The market isn't growing for you.

US manufacturing and wholesale sales reached $15.12 trillion in 2025, up just 0.4% on 2024, and only 1.8% in total since 2022 (Digital Commerce 360, from US Department of Commerce data). Growth has to come from existing accounts: more orders, more often, with more in the basket.

2

Buyers try online, but most of the spend stays offline.

65% of industrial buyers made at least one online purchase in 2025, up from 45% in 2018. Yet online is still only about 30% of what they buy (Channel Marketing Group and BigCommerce, 345 buyers). The first order happened. The habit didn't.

3

Incentive money isn't built to change that.

The average industrial company loses over 6% of revenue through off-invoice discounts and leakage, and most of it is barely tied to sales incentives or customer behavior (Bain & Company and Pricefx).

Why the second order is the one that counts

For a B2B supplier, the first online order is rarely new revenue. The account already buys from you. The return on a digital commerce investment comes when that account keeps ordering through the channel you built: every cycle, through the storefront, adding a product line now and then.

86%

That's also where buyers are making up their minds. In SAP's *B2B Buyer Loyalty Index 2025*, **a survey of 3,008 decision-makers involved in enterprise technology purchases in five countries, 86% said their organization is more likely to allocate budget to a supplier it has a strategic partnership or a loyalty or incentive program with.** Loyalty in B2B isn't a nice-to-have. It's where the next budget goes.

One thing the gap is not about: pushing every buyer online.

McKinsey's *B2B Pulse* survey of nearly 4,000 decision-makers found what it calls the "rule of thirds": at every stage of the buying journey, about a third of B2B customers want in-person interactions, a third want remote contact and a third prefer digital self-serve, and the split holds for repeat purchases too. So closing the Reorder Gap doesn't mean taking orders away from reps. It means the account keeps coming back and ordering again, in the channel that suits it, with the storefront as the easiest option for the buyers who want to serve themselves.

That's why the companies doing this well reward the account's behavior and credit reps for online orders, instead of making the storefront and the sales team compete.

Three numbers to know before you change anything

Metric	How to calculate it	What to look for
Online second-order rate	Accounts that placed a first online order in the last 6 months, and placed a second one online within their usual cycle (often 60 days)	The trend by segment, region and rep. The direction matters more than any single number
Online share of repeat orders	Repeat orders placed through the storefront, divided by all repeat orders (storefront, email, phone, rep)	Accounts that ordered online once and then went back to offline channels
Product lines per account	Number of product lines each account bought in the last 12 months, compared with the 12 months before	Accounts that buy one line from you and the rest from someone else

Five places the gap opens

1

Reorders

An account that usually orders every month is now at day 40, and nobody notices until the quarterly review. By then, the order went somewhere else.

What good looks like: the second-order rate is tracked every month, late accounts trigger an alert to the rep, and the account gets a reason to reorder now.

2

Basket size

Buyers reorder exactly what they ordered last time. Nothing suggests the next line, the complementary product or the bundle. And buyers do shop around: in the same Channel Marketing Group study, 58% of purchases happened outside traditional distributor relationships.

What good looks like: one complementary line per segment, a visible incentive for the first order of it, and product lines per account tracked as a growth metric.

3

Self-service

The portal works, but for a repeat order an email to the rep is still easier, and the rep is often paid the same either way, or better offline. "Digital is the preferred channel for most buyers," the Channel Marketing Group study notes. "But when ecommerce tools fall short, they fall back on phone calls, texts, or in-person visits." Buyers notice the friction: 28% of decision-makers in SAP's study named disconnected experiences across touchpoints as a loyalty dealbreaker.

What good looks like: reorder from history or a saved list is the default, and reps get credit for online orders from their accounts.

4

Rewards

Incentive budgets mostly pay for volume, through rebates calculated months after the order, or through discounts every account gets. Neither tells a buyer what to do differently on the next order.

What good looks like: part of the budget pays for specific behaviors (an on-cycle reorder, an online order, a first order of a new line) and the reward shows up when the order happens, in the storefront.

5

Data

Rebates and incentives live in spreadsheets or a separate system, away from the orders. In a Channel Marketing Group 2026 study of 153 manufacturers and distributors, nearly 26% rated their rebate reporting as unacceptable.

What good looks like: incentives and rebates are calculated on the same order and account data in Salesforce, and every program is measured against a control group.

Where does your business stand?

The gap closes when buyers have a reason to come back. Our self-assessment looks at that reason: which behaviors you reward, how buyers find out, how fast you can change an incentive, and how you measure it.

- 11 multiple-choice questions: the first, on the behaviors you'd most like to encourage, isn't scored.
- About 2 minutes, with your score out of 30 on screen as soon as you finish.
- **Tip:** ask someone from commerce, sales and finance to take it separately, then compare. Where the answers differ is usually where the gap is.

Take the self-assessment here

A first program in 90 days

You don't need a 12-month loyalty project to start closing the gap.
A focused first program looks like this:



Weeks 1-2:
Pick one behavior and one segment.
Usually the on-cycle reorder through the storefront, for accounts with room to grow. Set a control group aside before launch.

Weeks 3-6:
Fund it and build it. Move a small slice of existing discounts into a reward the whole account can use, like order credit or free freight. Show it in the storefront and on the account record for the rep.

Weeks 7-12:
Run it and measure it. Reorder frequency, online share and margin per account, against the control group, every two weeks. Change what doesn't work by week four.

Day 90:
Decide. Expand to the next segment or the next behavior, with numbers finance has already seen.

About Fielo

Fielo is a Salesforce-native B2B commerce loyalty and incentives platform. It helps Commerce Cloud teams close the Reorder Gap by rewarding the behaviors that build revenue (the second order, the on-cycle reorder, the next product line) right where buyers order, inside the Salesforce org they already own. Incentives, rebates and partner programs run on the same order and account data, with progress visible to buyers in the storefront and to reps in Salesforce.

Want to go through your self-assessment results with someone? Book a 20-minute review with a Fielo expert: https://fielo.com/contact-us

Read more: fielo.com/blog/b2b-reorder-gap

Sources

This report uses published third-party research only. Figures are quoted as reported by each source; survey samples and dates are listed below so you can judge how they apply to your market.

- Digital Commerce 360 - *US B2B sales exceed $15 trillion in 2025, 2026*, analysis of US Department of Commerce data. digitalcommerce360.com/2026/01/26/us-b2b-sales-exceed-15-trillion-2025
- Channel Marketing Group/BigCommerce, survey of 345 industrial supplies buyers and contractors, as reported by Digital Commerce 360, 2025. digitalcommerce360.com/2025/06/09/industrial-b2b-buyers-digital-shift-order-online
- SAP - *B2B Buyer Loyalty Index 2025*, research of 3,008 decision-makers involved in enterprise tech purchases in the UK, US, Australia, Germany and Taiwan, 2025. emarsys.com/app/uploads/2025/09/B2B-Buyer-Loyalty-Index-2025.pdf
- Bain & Company, with Pricefx - *The Hidden Profit Killers in Off-Invoice Discounts, 2021* (global sample of industrial companies). bain.com/insights/off-invoice-discounts
- McKinsey & Company - *Five fundamental truths: How B2B winners keep growing, 2024*, based on the 2024 B2B Pulse Survey of nearly 4,000 B2B decision-makers in 13 countries. mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/five-fundamental-truths-how-b2b-winners-keep-growing
- Channel Marketing Group/Enable - Survey of 153 manufacturers and distributors, as reported by Electrical Trends, 2026. electricaltrends.com/2026/01/05/improving-rebate-performance-is-a-team-sport-research-report