

Returns Management & Reverse Logistics

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting returns management and reverse-logistics software: what these systems do, how the market and vendors stack up in 2026, what they cost, how to run the selection, and how to de-risk the rollout.

Prepared by **Supply Chain Research** · June 2026 · Vendor-neutral: we take no payment from the vendors covered.

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1. Executive summary

Returns are the part of commerce that runs backward, and the software that manages them spans two very different worlds. Returns management software is the customer-facing layer: the return portal, the reason capture, the label, the exchange or refund, and the logic that turns a return into a retained sale. Reverse logistics is the physical and operational flow behind it: receiving, inspection, disposition, restocking, refurbishment, recycling, and resale on the secondary market. Conflating the two is the single most common mistake buyers and analysts make, because the reverse-logistics services market is roughly a hundred times larger than the returns-software market. In 2026, with United States returns near \$850B a year and fraud a growing line item, the category is consolidating fast and reorganizing around AI, deflection, and recommerce.

This guide is written for e-commerce, retail, operations, and IT leaders evaluating a returns or reverse-logistics investment, and for the teams who must integrate it. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best platform, because the right choice depends on your return volume, channel mix, disposition needs, and the systems you already run. The pages that follow define the category and separate software from services, size the market honestly across its very different definitions, profile the customer-facing, reverse-logistics, network, and OMS-embedded tiers, lay out an evaluation framework, and explain why retained revenue and recovery value, not portal features, decide the return.

\$0.7-12B range of 2025 returns-software estimates, against a reverse-logistics services market roughly 100x larger	\$850B projected US retail returns in 2025, a 15.8% return rate, with e-commerce near 19.3%	No MQ there is no Gartner Magic Quadrant for returns or reverse logistics; selection leans on references and pilots
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What the evidence says

Separate the software market from the services market. Returns-management software is sized from under \$1B to about \$12B depending on definition, while the reverse-logistics services market runs from roughly \$710B to \$840B. They are not the same thing.

No analyst quadrant exists for the category. There is no Gartner Magic Quadrant or clean Forrester Wave for returns or reverse logistics. The most-cited ranking, from FeaturedCustomers, is a customer-reference report, not an independent analyst evaluation.

Returns are large, costly, and increasingly fraudulent. United States returns reached \$890B in 2024 and a projected \$849.9B in 2025; about 9 percent of returns are fraudulent, and preventable fraud and abuse approaches \$100B.

Consolidation is reshaping the field. Affirm bought Returnly and then shut it down, PayPal bought Happy Returns and sold it to UPS, Blue Yonder acquired Optoro, and DHL acquired Inmar's reverse-logistics business, all since 2023.

Retained revenue, not portal features, drives ROI. Value comes from converting returns into exchanges, recovering value through disposition and resale, and reducing fraud; the headline retention figures are vendor-sourced and should be tested on your own data.

2. What returns software is

The returns stack has three distinct layers, and getting them straight is the first step to buying the right thing. Most vendors lead in one layer and partner or extend into the others.

- **Returns management software (customer-facing).** Self-service return portals, return-reason capture, label generation, exchanges and store credit, refunds, and the deflection logic that steers shoppers toward keeping or exchanging rather than returning.
- **Reverse logistics (physical and operational).** Receiving, inspection, grading, and disposition of returned goods, then restocking, refurbishment, recycling, or resale, including the warehouse workflows and secondary-market channels.
- **Returns orchestration and analytics.** Routing and consolidating returns, automating disposition decisions, managing warranty and repair, detecting fraud, and reporting on the whole flow.

How the categories relate

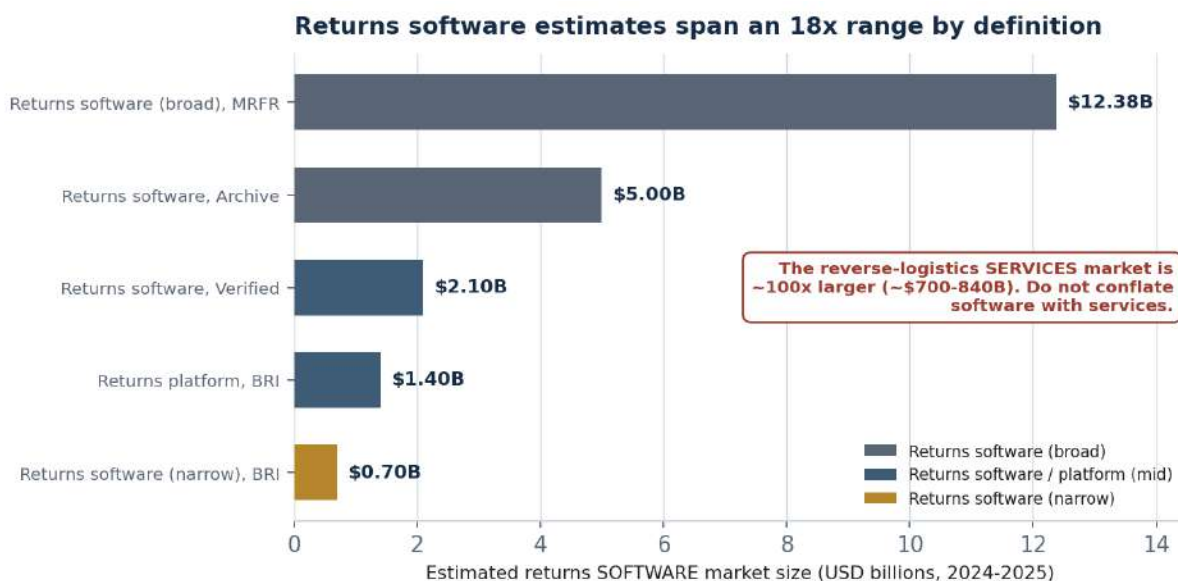
Layer	What it covers	Scope
Returns software	Portals, labels, exchanges, refunds, deflection	Customer-facing
Reverse logistics	Receiving, disposition, restock, refurbish, resale	Physical / services
Orchestration	Routing, automated disposition, fraud, analytics	Connecting layer
OMS / WMS	Order and warehouse systems with returns modules	Adjacent / embedded
Drop-off network	Box-free returns at staffed locations	Physical network

Software versus services: the distinction that matters

The returns-management software market, the customer-facing portals and orchestration tools, is a low-single-digit to low-double-digit billion-dollar category. The reverse-logistics services market, the physical handling, transportation, processing, and recommerce of returned goods, is sized in the hundreds of billions. A retailer choosing a return portal and a retailer outsourcing the physical processing of millions of returns are making completely different decisions at completely different scales. This guide focuses on the software and the platforms, and flags where a decision is really a services decision.

3. The returns software market in 2026

Returns is among the most loosely defined markets in commerce technology, and the published software numbers vary by more than tenfold. The chart below shows the software estimates only; the reverse-logistics services market is sized separately and is roughly a hundred times larger. Treat the figures as directional and always check the definition.



Source: Supply Chain Research analysis of published software estimates, 2024-2025. The services market (Fortune BI, IMARC) is sized separately and is roughly 100 times larger.

Figure 1. Published 2024-2025 returns SOFTWARE estimates by definition. The reverse-logistics services market is sized separately at roughly \$710B to \$840B.

Category and source	Size	Forecast	CAGR
Returns software (broad), MRFR	\$12.38B (2024)	\$26.38B / 2035	7.1%
Returns software, Archive	~\$5B (2025)	strong growth	~15%
Returns software, Verified	\$2.1B (2024)	\$7.8B / 2033	15.7%
Returns platform, BRI	\$1.4B (2025)	\$2.89B / 2035	8.0%
Returns software (narrow), BRI	\$0.7B (2025)	\$1.38B / 2035	8.0%
Reverse logistics SERVICES, Fortune BI	\$839.88B (2025)	\$1,260.8B / 2034	4.6%



Source: midpoint of the focused-software field (Verified Market Research and peers). Broad-definition estimates grow at a similar low-double-digit pace.

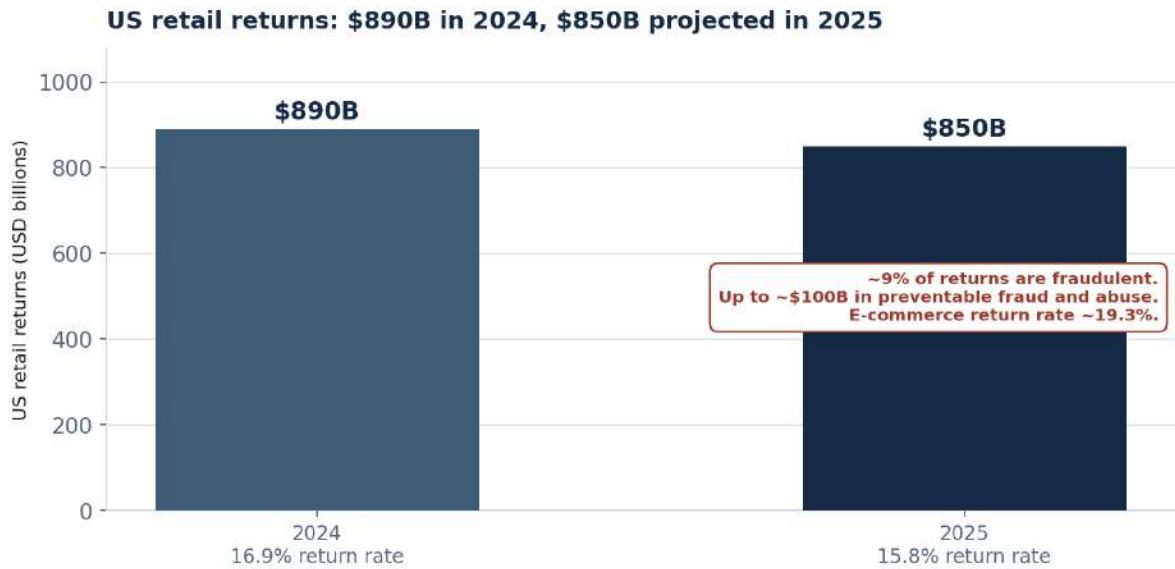
Figure 2. A representative trajectory for returns management software at about 12% CAGR (mid-range of the focused-software field).

Why the estimates diverge

The spread is a definition problem layered on a software-versus-services problem. The narrowest software figures count only dedicated returns applications; the broadest fold in post-purchase platforms, order-management returns modules, and adjacent capabilities. Separately, the reverse-logistics services market counts the physical handling, transportation, and processing of returned goods, and dwarfs the software market. North America is the largest software region at roughly 45 to 64 percent depending on the source, and cloud deployment dominates. For planning, treat the focused software figures, roughly \$1B to \$5B in 2025 growing in the low double digits, as the most consistent baseline for a software purchase.

The returns economics driving the market

The demand is anchored in hard numbers. United States retail returns reached \$890B in 2024, a 16.9 percent return rate, and are projected at \$849.9B in 2025, a 15.8 percent rate, with e-commerce returns near 19.3 percent, according to the National Retail Federation and Happy Returns. Fraud is now a material cost: about 9 percent of returns are fraudulent, and preventable fraud and abuse approaches \$100B. Free returns still drive purchases for most shoppers, and younger consumers return the most. Those pressures explain why retailers are simultaneously chasing deflection, fraud detection, and recovery value.



Source: National Retail Federation and Happy Returns, 2024 and 2025 Retail Returns reports; Appriss Retail / Deloitte (fraud and abuse). Independent, third-party data.

Figure 3. United States retail returns and rates, 2024 and 2025, with the fraud and abuse overlay (NRF and Happy Returns; Appriss Retail and Deloitte).

4. The vendor landscape

The returns market is crowded and segmented, and the absence of an analyst quadrant makes the segmentation harder to see. We group vendors into four tiers by what they do best, not by size. No vendor leads every tier, and the customer-facing and back-end disposition worlds are largely distinct.

What the analysts say, and what they do not

This is the category's defining quirk for buyers: there is no Gartner Magic Quadrant for returns or reverse logistics, and no clean Forrester Wave. Coverage is indirect, through post-purchase and order-management research. What does exist:

- **A customer-reference ranking, not an analyst quadrant.** The most-cited list, the FeaturedCustomers Fall 2025 report, names AfterShip, FarEye, Happy Returns, Metapack, Narvar, nShift, and parcelLab as Market Leaders, but it is a customer-success and marketing report, not an independent evaluation.
- **Third-party economics from consultancies.** McKinsey has put the labor saving from automating a return at roughly \$10 to \$15 each, and NRF and Apriss Retail supply the authoritative returns and fraud data.
- **No standalone quadrant means references matter more.** With no analyst scoreboard, verified peer reviews and reference customers of similar profile carry more weight in vendor selection than in adjacent categories.

Returns and reverse-logistics landscape, 2026



No Gartner Magic Quadrant exists for returns or reverse logistics. This is Supply Chain Research's directional interpretation from capability analysis and customer-reference reports, not analyst coordinates.

Figure 4. Supply Chain Research's directional map. No Gartner Magic Quadrant exists for returns or reverse logistics; these positions are our interpretation, not analyst coordinates.

Customer-facing returns platforms

These vendors own the shopper-facing return experience. Loop Returns leads the Shopify ecosystem with an exchange-first design built to retain revenue, and states it has processed more than 70 million returns and helped merchants retain over \$2 billion across 5,000-plus brands (vendor-stated); Affirm took an equity stake after winding down its own Returnly. Narvar serves the enterprise with branded post-purchase and tracking, more than 1,500 customers, and an AI engine for returns, at custom pricing reported in the tens of thousands of dollars a year. AfterShip Returns spans more than 1,200 carriers and starts near \$19 a month, strong for global and multi-carrier returns. ReturnGO, Rich Returns and ReturnLogic, Swap, Redo, and yayloh round out the field.

Strengths and limitations

Strengths: fast deployment, exchange and deflection logic, and customer experience. Limitations: most are front-end only and depend on the warehouse and disposition systems behind them; the Shopify-centric tools weaken at enterprise and multi-carrier scale. Best fit when the priority is the shopper experience and retained revenue.

Reverse-logistics and disposition platforms

These vendors own the back end: grading, disposition, restock, refurbishment, and resale. Optoro is the deepest disposition and recommerce platform and was acquired by Blue Yonder, with the deal closing in August 2025. goTRG, rebranded ReturnPro in late 2024, processes tens of millions of returns a year for the largest retailers and is the source of the widely cited figure that returns processing can cost 75 percent or more of unit value. B-Stock runs the largest B2B recommerce and liquidation marketplace, citing more than 140 million units sold in 2024 (vendor-stated). ReverseLogix offers an end-to-end returns management system across B2B and B2C, Inmar's reverse-logistics business was acquired by DHL in January 2025, and Liquidity Services operates public recommerce marketplaces with \$1.57B in fiscal 2025 gross merchandise volume.

Strengths and limitations

Strengths: real recovery value, disposition automation, and secondary-market reach. Limitations: these are operational and services-heavy engagements, not quick portal installs, and several are now embedded in larger platforms. Best fit when the volume of non-resellable or returned inventory is large enough that recovery value moves the numbers.

Networks and OMS-embedded returns

Two adjacent groups complete the picture. Drop-off and cross-border networks, Happy Returns (now a UPS company, with box-free returns at over 5,000 United States locations), Doddle (Blue Yonder), and ZigZag Global for cross-border, provide the physical return network rather than the software alone. And order-management vendors, Manhattan, Blue Yonder (now combining Optoro, Doddle, and Inmar), and Fluent Commerce, embed returns into the broader order lifecycle, a fit where returns should live inside the OMS rather than in a separate tool.

Vendor summary

Vendor	Tier	Best fit	Notes
Loop Returns	Customer-facing	Shopify, exchange-first	Affirm equity stake; absorbed Returnly merchants
Narvar	Customer-facing	Enterprise post-purchase	1,500+ customers; custom pricing

Vendor	Tier	Best fit	Notes
AfterShip	Customer-facing	Global, multi-carrier	1,200+ carriers; from ~\$19/mo
Optoro (Blue Yonder)	Reverse logistics	Disposition and recommerce	Acquired by Blue Yonder, Aug 2025
goTRG / ReturnPro	Reverse logistics	High-volume processing	Tens of millions of returns a year
B-Stock / Liquidity Services	Recommerce	Secondary-market resale	Largest B2B liquidation marketplaces
Happy Returns (UPS)	Drop-off network	Box-free returns	5,000+ US drop-off locations
Manhattan / Fluent	OMS-embedded	Returns inside the OMS	For order-lifecycle-centric retailers

Positions and notes are Supply Chain Research's interpretation from public information and customer-reference reports, current to mid-2026. Ownership and product scope change quickly; verify current details directly with each vendor.

5. How to evaluate a returns platform

Because there is no analyst quadrant to lean on, a disciplined evaluation matters more here than in most categories. We use five dimensions. Score each vendor against your own return profile, starting with whether your real problem is the shopper experience or the back-end flow.

The five evaluation dimensions

1. **Customer experience and deflection.** How good is the return portal, and how effectively does it steer shoppers toward exchanges and store credit rather than refunds?
2. **Disposition and recovery.** Can the platform grade returns and route them to restock, refurbishment, recycling, or resale, and how much value does it recover?
3. **Fraud detection.** Given that roughly 9 percent of returns are fraudulent, how does the platform detect and prevent return fraud and abuse?
4. **Integration.** How cleanly does it connect to your e-commerce, order-management, warehouse, and carrier systems? This is where enterprise programs succeed or fail.
5. **Scope, scale, and viability.** Does it match your channel mix, geography, and volume, and is the vendor stable in a fast-consolidating market?

Making the decision

Map your need before you shortlist. If the priority is the shopper experience and retaining revenue, start with the customer-facing platforms. If the priority is recovering value from large volumes of returned or non-resellable inventory, start with the reverse-logistics and recommerce specialists. If returns should live inside the order lifecycle, start with the OMS-embedded options. And if the gap is a physical return network, the drop-off networks may be the answer. Then run a pilot.

A selection process that works

6. Define your return profile: volume, channel mix, return reasons, disposition needs, and the systems it must touch.
7. Match that profile to a tier, and shortlist within it rather than across all four.
8. Pilot on real return volume, measuring exchange and deflection rates, recovery value, and processing cost against today.
9. Test integration with your e-commerce, OMS, WMS, and carriers early, with real data.
10. Weigh fraud detection and vendor viability, favoring platforms whose direction matches yours as the market consolidates.

6. Cost and pricing

Returns pricing is more transparent at the small end and more opaque at the enterprise and services end. Customer-facing tools publish tiered pricing with per-return fees; reverse-logistics and recommerce engagements are quoted on volume and recovery economics. The models you will encounter:

Pricing model	Typical basis	Notes
SaaS subscription	Tiered monthly	Loop from ~\$155/mo; AfterShip from ~\$19/mo
Per-return fee	Usage-based	Added on top of subscription; scales with volume
Percentage of value	Recovery-based	Common in recommerce and liquidation
Enterprise / services	Custom / gated	Narvar in the tens of thousands a year and up
Implementation	Project fee	Enterprise integration commonly 6-18 months

What drives the number

Return volume, channel and carrier mix, and whether you need disposition and recommerce on top of a portal are the main cost drivers. Customer-facing tools are quick and inexpensive to start; reverse-logistics and recommerce engagements are larger, services-heavy, and priced on recovered value. Note that exchange transactions can carry payment-processing fees, and enterprise integration with order, warehouse, and carrier systems can run six to eighteen months. Model the all-in cost, including processing fees and integration, not the subscription alone.

Enterprise and services pricing is typically gated behind a sales process, so published figures should be treated as starting points. Build a pilot and a reference check into the buying process to validate both cost and the retention and recovery the vendor projects.

7. Implementation: where programs succeed or fail

Returns programs fail in predictable ways, and the failure modes differ by layer. Customer-facing tools fail on integration and adoption; reverse-logistics programs fail on process and disposition discipline. The recurring causes:

- **Weak integration.** If returns data does not flow cleanly between the portal, order-management, warehouse, and carrier systems, refunds, restock, and tracking break down.
- **Treating the portal as the whole solution.** A polished return portal with no disposition discipline behind it improves the shopper experience but not the economics.
- **Underinvesting in fraud detection.** With roughly 9 percent of returns fraudulent, a program that ignores fraud leaves a large, growing cost untouched.
- **Optimizing deflection at the expense of trust.** Pushing exchanges and tightening policy too hard can dent the customer relationship that free, easy returns were meant to protect.

Integration	Disposition	Fraud
clean links to OMS, WMS, and carriers are the precondition for value	recovery value comes from grading and routing, not the portal alone	about 9% of returns are fraudulent and must be designed for

Three principles that separate success from failure

Decide which problem you are solving. A shopper-experience problem and a recovery-value problem call for different platforms; do not buy a portal to fix a disposition gap.

Wire returns into the order lifecycle. Integrate the returns flow with order-management, warehouse, and carrier systems so refunds, restock, and tracking actually work.

Design for fraud and recovery from the start. Build fraud detection and disposition discipline into the program, because that is where the money is, not in the portal alone.

A phased rollout

Sequence the program to retire risk early. Begin with the customer-facing portal and its integration into order-management and carriers, which delivers a quick, visible win. Add disposition and recovery discipline, routing returns to restock, refurbishment, or resale, and layer in fraud detection. Then, where volumes justify it, extend into recommerce and secondary-market channels. Treating these as sequential stages, rather than a single switch, is what separates a smooth rollout from a stalled one.

8. Trends shaping 2026

AI for disposition and grading

The clearest operational shift is AI deciding what happens to each returned item, grading condition and routing it to restock, refurbishment, recycling, or resale to maximize recovery. This is where reverse-logistics platforms are investing, and where the recovery value of a return is increasingly won or lost.

Returns fraud detection

Fraud is the defining returns theme of the moment. With about 9 percent of returns fraudulent and preventable fraud and abuse near \$100B, retailers are deploying AI to detect it, though by their own account only a minority find it fully effective. A dedicated fraud-detection sub-market is emerging alongside the returnless-refund trend.

Returnless refunds and keep-it economics

When processing a return can cost as much as the item itself, telling the customer to keep it can be the cheaper choice. Keep-it and returnless-refund policies have spread among large retailers, balanced carefully against the fraud risk they can invite. The economics, not generosity, drive the decision.

Exchange-first deflection

Converting a return into an exchange or store credit retains the revenue, and exchange-first design has become the central selling point of the customer-facing platforms. The art is doing it without making returns feel difficult enough to lose the customer.

Recommerce and resale

Returned and excess inventory increasingly flows into resale rather than landfill, and recommerce is becoming a core part of the returns strategy. The secondhand apparel market alone reached about \$197B in 2023 and was growing many times faster than retail overall, pulling returns platforms toward integrated resale.

Convergence into post-purchase and OMS

The strongest structural trend is convergence. Returns are being absorbed into broader post-purchase and order-management platforms, with Blue Yonder assembling Optoro, Doddle, and Inmar into a single reverse-retail capability. For buyers, this means today's point purchase should be weighed for how well it will fit a more unified stack tomorrow.

9. Segment-specific guidance

The right approach depends on what you sell and how you sell it. The table summarizes where each segment usually starts; the prose adds the nuance.

Segment	What matters most	Where to start
Shopify / DTC brand	Exchange-first experience	Loop, ReturnGO, Redo
Enterprise retailer	Branding, scale, fraud	Narvar, AfterShip, OMS-embedded
High-return apparel	Deflection and recovery	Exchange-first plus recommerce
High-value / electronics	Grading, refurbishment, resale	Optoro, goTRG, B-Stock
Cross-border	International returns	ZigZag Global, AfterShip

Shopify and direct-to-consumer brands reward the exchange-first experience of Loop and its peers.

Enterprise retailers need branding, scale, and fraud controls, pointing to Narvar, AfterShip, or an OMS-embedded approach. **High-return categories such as apparel** live on deflection and recovery, pairing an exchange-first portal with recommerce. **High-value and electronics sellers** need grading, refurbishment, and resale, the home turf of Optoro, goTRG, and B-Stock. And **cross-border sellers** need the international reach of specialists like ZigZag Global. The unifying rule is to match the tier to the returns problem, not to buy a portal when the problem is recovery.

10. ROI and the business case

The business case for returns software is straightforward in structure and easy to overstate in practice. The levers are retained revenue, recovery value, processing cost, fraud reduction, and customer retention. The discipline is refusing to bank the vendor's headline retention figure before you have proven it on your own returns.

Retention converting returns to exchanges retains revenue that a refund loses	\$10-15 labor saving per return from automation (McKinsey, third-party)	Recovery grading and resale recover value that liquidation or landfill destroys
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Where the value comes from

Most of the return is in a few places. Retained revenue is the headline lever for customer-facing platforms: converting a return into an exchange or store credit keeps the sale, and Loop cites brands retaining a majority of return revenue (a vendor-stated figure). Recovery value is the lever for reverse-logistics platforms: grading and routing returns to restock, refurbishment, or resale recovers value that liquidation or disposal destroys. Processing cost falls when returns are automated, with McKinsey putting the labor saving at roughly \$10 to \$15 per return. Fraud reduction protects all of it, given that preventable fraud and abuse approaches \$100B. Build the case on your own exchange rate, recovery value, and processing cost, and use vendor figures only to size the opportunity.

11. Frequently asked questions

What is the difference between returns management software and reverse logistics?

Returns management software is the customer-facing layer: the portal, labels, exchanges, and refunds. Reverse logistics is the physical and operational flow behind it: receiving, inspection, disposition, restock, refurbishment, and resale. The services market for the latter is roughly a hundred times larger than the software market.

Who are the leading vendors?

It depends on the layer. Customer-facing platforms include Loop Returns, Narvar, and AfterShip; reverse-logistics and disposition platforms include Optoro, goTRG, B-Stock, and Liquidity Services; drop-off networks include Happy Returns; and order-management vendors like Manhattan and Fluent embed returns into the OMS.

Is there a Gartner Magic Quadrant for returns?

No. There is no Gartner Magic Quadrant or clean Forrester Wave for returns or reverse logistics. The most-cited list, from FeaturedCustomers, is a customer-reference and marketing report, so verified peer reviews and references matter more in selection.

How big is the returns software market?

It depends on the definition, ranging from under \$1B to about \$12B in 2025. The reverse-logistics services market is sized separately at roughly \$710B to \$840B, so it is essential to separate the software market from the services market.

How large are retail returns overall?

United States retail returns reached \$890B in 2024, a 16.9 percent return rate, and are projected at \$849.9B in 2025, a 15.8 percent rate. E-commerce returns run near 19.3 percent, and about 9 percent of all returns are fraudulent.

What does returns software cost?

Customer-facing tools range from about \$19 a month for entry tiers to enterprise pricing in the tens of thousands of dollars a year, usually with per-return fees on top. Reverse-logistics and recommerce engagements are priced on volume and recovered value.

What are returnless refunds?

Policies that refund a customer without requiring the item back, used when processing a return would cost as much as the item. Keep-it economics have spread among large retailers, balanced against the fraud risk such policies can invite.

How is AI changing returns?

AI is being applied to disposition and grading, deciding what happens to each returned item to maximize recovery, and to fraud detection. Retailers are deploying it widely, though by their own account only a minority currently find fraud detection fully effective.

How long does implementation take?

Customer-facing portals can deploy quickly. Enterprise integration with order-management, warehouse, and carrier systems commonly takes six to eighteen months, and reverse-logistics engagements are larger, services-heavy programs.

What determines ROI?

Retained revenue from exchanges, recovery value from disposition and resale, lower processing cost, and fraud reduction. The headline retention figures are vendor-sourced and should be validated against your own exchange rate, recovery value, and processing cost.

12. Recommendations

A practical path for buyers, drawn from the analysis above:

- 11. Separate the software decision from the services decision.** Decide whether you are buying a customer-facing portal, a reverse-logistics service, or both; they operate at completely different scales.
- 12. Match the tier to the problem.** Customer-facing platforms (Loop, Narvar, AfterShip) for the shopper experience, reverse-logistics and recommerce specialists (Optoro, goTRG, B-Stock) for recovery value, OMS-embedded returns for order-lifecycle-centric retailers.
- 13. Do not wait for an analyst quadrant that does not exist.** Lean on verified peer reviews, references of similar profile, and your own pilot rather than a ranking, and read the FeaturedCustomers list as marketing.
- 14. Design for fraud and recovery, not just the portal.** Build fraud detection and disposition discipline into the program, because that is where the cost and the recovery value concentrate.
- 15. Treat vendor retention claims as a ceiling.** Build the business case on your own exchange rate, recovery value, and processing cost, and prove it on real return volume before scaling.
- 16. Weigh viability in a consolidating market.** Favor vendors whose direction and ownership match yours, given the wave of acquisitions reshaping the field.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, National Retail Federation and Appriss Retail returns data, vendor disclosures, and trade reporting, current to mid-2026. Supply Chain Research is independent and accepts no payment from the vendors covered.
- The returns SOFTWARE market and the reverse-logistics SERVICES market are separated throughout, because the services market is roughly a hundred times larger; software estimates themselves vary by more than tenfold by definition.
- There is no Gartner Magic Quadrant or clean Forrester Wave for returns or reverse logistics. The most-cited ranking, from FeaturedCustomers, is a customer-reference report, and the landscape map in Figure 4 is our directional interpretation, not analyst coordinates.
- Retention, recovery, and processing figures from vendors are vendor-stated and treated as a ceiling; the independent data are from NRF and Happy Returns, Appriss Retail and Deloitte, McKinsey, and ThredUp and GlobalData.
- Vendor ownership and product scope change quickly, including the Optoro acquisition by Blue Yonder and the Inmar reverse-logistics acquisition by DHL. Validate current details directly with vendors before any purchasing decision.

14. Sources

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Additional figures drawn from: Verified Market Research and Archive Market Research (returns software sizing); Appriss Retail and Deloitte (returns fraud and abuse); McKinsey (per-return labor savings); ThredUp and GlobalData (secondhand market); Loop Returns, B-Stock, and Liquidity Services (vendor and SEC-reported figures). Vendor capability, retention, and recovery claims are vendor-stated unless otherwise noted, and there is no Gartner Magic Quadrant for this category.

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