

The US Fulfillment Playbook for E-Commerce Brands

- What is the best model of fulfillment provider for growing e-commerce brands in 2026

January 2025



Discover why fulfillment models are shifting



Learn how to match your brand's growth stage to the right provider



See why modern brands are outgrowing traditional setups

Commissioned & written by the Wayfindr editorial team

Table of Contents

Part 1 Understanding fulfilment models	04
1.1. The 3 models of fulfilment	05
1.2. Fourth Party Providers (4PLs)	06
1.3. Third Party Providers (3PLs)	08
1.4. Tech-Enabled Providers (TEFs)	09
<hr/>	
Part 2 Understanding E-commerce Brands - Which one are you?	10
New Brand	10
Growing	11
Established	12
<hr/>	
Part 3 Selecting a 4PL Provider - Which is best for me?	13
Growth Stage	13
Key Differentiator: Brand Profile	14
<hr/>	
Conclusion	15
Why growth and mature brands should choose 4PLs	15
<hr/>	
Contact	16
Let's Find a Way - Together	16

Executive Summary

How the Right Fulfillment Partner Fuels Global Brand Growth

The fulfillment landscape has shifted. E-commerce brands today don't just need packages shipped - they need agile, tech-enabled logistics partners who understand their customers, their tech stack, and their ambitions.

This report explores what growing e-commerce brands really want from fulfillment providers in 2025 - and what happens when they don't get it.

You'll discover:

- **Types of fulfilment models & how they are changing**
- **Growth stages of E-commerce brands**
- **How brands should evaluate providers**

Whether you're shipping 500 or 50,000 orders a month, understanding how fulfillment impacts your **speed, scalability, and customer experience** is critical to your next stage of growth.

Wayfindr prepared this report to help brands like yours cut through complexity and make smarter logistics decisions. We've seen behind the curtain - and we're here to help you find the path forward.



Part 1

Understanding Fulfillment Models

The Fulfillment Landscape in 2025

Why Modern Brands Are Rethinking Their Fulfillment Strategy



Market Evolution

E-commerce has changed the fulfillment industry. It is now easier than ever to start a brand and sell products directly to consumers. This is reflected in the fact that e-commerce sales have outpaced overall retail sales for more than a decade, a trend that will continue.

New Wave Fulfillment

Over the past decade, a new wave of warehouse providers has emerged with a technology-first approach. While we are still in the early days, and there are various models being tested, generally these new providers offer proprietary software that integrates seamlessly with a brand's e-commerce software stack (e.g. Shopify, Anvyl, Flexport, Loop). This provides a simple, all-encompassing tool for brands to manage inventory, orders, and invoicing, all common pain points brands report when working with traditional 3PLs.

1.1

The 3 Models of Fulfillment and How They Compare

1. 4PL (Fourth-Party Logistics)

What it is: A tech layer that manages multiple 3PLs and logistics partners for you.

Strengths: Flexibility, scalability, global reach, single point of contact, centralized tech.

Weaknesses: Requires operational coordination - best suited for brands ready to scale.

2. 3PL (Third-Party Logistics)

What it is: Warehouses that store, pick, pack, and ship your inventory.

Strengths: Asset ownership, operational depth, often stable.

Weaknesses: Limited tech, rigid networks, manual onboarding, outdated invoicing.

3. TEF (Tech-Enabled Fulfillment)

What it is: Software + fulfillment in one. Think “logistics-as-a-service.”

Strengths: Easy sign-up, clean interfaces, fast onboarding.

Weaknesses: Often lacks flexibility or deep customization as you scale.



1.2

Fourth Party Logistics Providers

Overview

4PLs are essentially API/technology layers that sit on top of a network of “asset-based” 3PLs (i.e. those doing the physical work). They create a digital network for 3PLs, offering 3PL partners the ability to farm-out excess space to brands who need to scale up or down their distribution operations. The 4PLs will vet the 3PL partner and assist the brand with identifying, selecting and integrating with the provider that is best suited for them, often owning the technology (WMS), account management and billing directly.

This software is also used by the warehouse operator (i.e. 3PL) which is key as it enables more Traditional providers (defined later), who often have outdated technology, to work with brands that have a modern technology stacks and may lack the resources to build custom connections and solutions with the 3PL’s warehouse systems.

4PL Category Leaders in the US

Provider	Website	Founded
Wayfindr	www.wayfindr.io	2015
Deliverr (now Flexport Logistics) (Only US)	www.deliverr.com	2017
Shipwire (part of CEVA) (only US)	www.shipwire.com/	2006
Flexe (only US)	www.flexe.com	2013
Shipbob	www.shipbob.com/	2014
Stord (only US)	www.stord.com	2015
Floship	www.floship.com	2015
Portless	www.portless.com	2023



"The 4PL Control Tower"

How They Operate

In practice, a brand will work with the 4PL to identify warehouses that meet their needs (capacity, location, product type), integrate with the 4PL technology platform and start working with the warehouse on a short or long-term basis. It's important to note that the brand engages directly with the 4PL whose technology sits between them and the supporting warehouse provider(s).

Brands can use these providers to quickly scale up and down their operations. They integrate quickly using the single technology platform and do not have contract terms. In a world increasingly dominated by on-demand and shared resources, this model makes brands feel comfortable testing ideas they have, knowing they can move on if it does not.

Value Proposition

Generally, this approach provides flexibility to brands who have high levels of uncertainty caused by fluctuations in demand and provides business to warehouse providers that have excess capacity, enabling a more modern technology platform for all parties to leverage.

Traditional Fulfillment Models - 3PLs

There are thousands of 3PLs offering services ranging from fulfillment and freight to ancillary services such as credit card processing, customer service, and web design. I focus on providers who offer omni-channel fulfillment services (e-commerce, wholesale, and retail) and differentiate them by looking at their network size, how long they have been in business, and what their target market is. This results in the following two categories outlined below.

Entrepreneurial 3PLs

Overview

An Entrepreneurial 3PL is one who primarily focuses on e-commerce fulfillment for new to growing brands. A brand utilizes them as its primary fulfillment provider to support all sales channels. They commonly promote partnership and trust, offering a great deal of empathy to brands. They offer general operations guidance to brands that typically lack in-house operations expertise. They also tend to have stable businesses, without the “going concern” risk that is emblematic of New Wave providers.

Category Leaders

Provider	Website	Founded	Facilities
Wayfindr (formerly CBIP)	www.wayfindr.io	2015	14+
DCL	www.dclcorp.com	1982	7
Capacity LLC	www.capacityllc.com	1999	8
Boxzooka	www.boxzooka.com	2014	3
MasonHub	www.masonhub.co	2018	3
Outerspace	www.outerspace.com	2017	3
Red Stag	www.redstagfulfillment.com	2013	3
Barrett Distribution	www.barrettdistribution.com	1941	19

1.5

Technology Enabled Providers (TEFs)

Overview

TEFs give brands access to an appealing, modern technology platform to manage their fulfillment processes, supported by a network of fulfillment centers they operate. These providers are generally easy to integrate with, offer simple pricing models, and provide a hands-off approach for the merchant when it comes to fulfilling orders and shipping their product.

TEFs manage and operate the warehouses they connect brands to, a key difference from the 4PL providers previously highlighted. They are often venture-backed and looking to grow quickly. They have flashy websites with seamless sign-up flows and do a great job attracting modern brands that lack experience with third-party fulfillment.

Category Leaders

Provider	Website	Founded	Facilities
ShipBob	www.shipbob.com	2014	12
GoBolt	www.gobolt.com	2017	9
ShipMonk	www.shipmonk.com	2014	12
Cart.com	www.cart.com	2020	18
Stord	www.stord.com	2015	500

Part 2

Understanding e-commerce Brands

E-commerce has reshaped what brands expect from fulfillment partners. Today's brands aren't just looking for someone to store and ship products - they want partners who understand their growth stage, support their operations, and help them scale.

This section outlines three common brand profiles in the market - **New, Growing,** and **Established** — each with distinct operational needs, decision-making behaviors, and fulfillment expectations.

“Where does your brand fit into this equation?”



New Brand

Brands that are preparing to launch their first product. They don't know how many orders they will receive, what their customer demographics will look like, and are overwhelmed by the idea of choosing a fulfillment provider. They may not even know what a 3PL is or does.

Their expectations have been shaped by Amazon and digitally native brands they admire. They want to provide fast shipping for free without fully understanding the consequences of doing so. They likely have put off looking for a fulfillment provider while focusing on building other areas of their business, and will need a partner who can quickly integrate with their Shopify store and kick off an operation without much input from them.

They want to move fast and are attracted to simple pricing structures and operations they can comprehend, despite their limited operational experience. They will need support and expect partners to provide account management services and real-time, on-demand dashboards to provide transparency on inventory and orders.



Growing Brand

Brands that have obtained a certain level of success and are seeing order volumes grow in excess of 50% year-over-year. They are starting to suspect they are overpaying for their fulfillment services, have experienced some pain with their first provider, and are looking for a new one that can support their current and future growth in terms of volume, sales channels, and product offering.

Their expectations are high. They want a provider who will solve the problems they are currently facing around order accuracy, performance, and operational know-how. They want a team that empathizes with their challenges and opportunities. They want this for less than they are currently paying and have been told there are better deals and options to be had.

They can predict order volumes but still see significant spikes day-over-day, week-over-week, and month-over-month. They are focused on outbound shipping and will be excited about competitive parcel rates that larger providers can provide. They have started to explore other selling channels, including wholesale, international, and in-person retail. They have come to rely on the account management services providers offer, viewing them more as an internal team member than a third party. They rely heavily on their provider's dashboard to manage orders and reporting to monitor the performance of the operation, and likely circulate this data within their own organization.

Established Brand

These are brands that have experienced tremendous success and likely moved beyond e-commerce. They are becoming household names, and while order volumes have steadied, volume is significant. They have multiple selling channels, operate out of multiple distribution facilities, and have team members who lead each supply chain function internally.

Their expectations are extremely high. They want to optimize every aspect of their supply chain and gain a complete understanding of their provider's operation, including each touch, cost center, and what margins you are charging them. Saving a few cents is material to their operating budget.

They have expanded internationally, work with multiple wholesale partners, and may have their own brick and mortar locations. They will look for partners who can support a multi-facility, global distribution network now and in the future. They have an internal resource that works with the provider on a daily basis. They rely less on reporting from their provider as they have built internal dashboards to track the performance of the operation.



Part 3

Selecting a 4PL Provider

When it comes to which type of fulfillment provider brands decide to use, the driving force tends to be the network of the founder, the growth stage the brand is in, their product profile (number of SKUs, category of product), and selling channels.



Growth Stage

1

New brands in particular tend to gravitate towards the new wave providers for two reasons: speed and technology. They are moving quickly and value responsiveness, simple onboarding, and technology integrations. They are also attracted by the do-it-all approach the new wave providers take, as they haven't established their technology stack quite yet. Working with a more traditional provider at this stage would require engineering resources and time, something they likely do not have.

2

Growing brands no longer trust the first provider they were recommended and are less swayed by well-constructed marketing strategies. Instead, they look at their competition, the brands similar to them that they aspire to be one day, and see which provider they are using. They then try to replicate, either by exploring that specific provider or one similar. This leads them to the Entrepreneurial or Traditional provider networks. These providers are better operators than the new wave of providers, and the technology hurdle (which is increasingly shrinking) can be overcome at this stage.

3

Established brands are skeptical of new providers and will mostly stick with the Traditional provider cohort. They have been burned in the past by switching providers too quickly ("the grass is always greener" fallacy) and take their time to fully vet out partners they believe can support them for several years to come.



Key Differentiator: Brand Profile

A more straightforward differentiator is what products the brand is selling and what channels they sell across. Not all providers are able to handle large, bulky goods or integrate with the wholesale channels the brand is using, for example. Increasingly, providers are starting to specialize in product categories as a way to differentiate themselves and create a more effective, cost-efficient operation.

This means that as brands start to establish their product catalog, they are able to find providers more suited to support their specific needs and shift away from a focus primarily on partnership or selling channels.

Concluding Thoughts: The Right Fit

Choosing the right fulfillment model isn't about chasing trends — it's about matching your brand's stage and ambitions with the provider type that can carry you forward. As this report has laid out, each model offers distinct advantages:

- **TEFs** are built for speed and simplicity, making them a natural fit for new brands just getting started. Their easy onboarding, intuitive platforms, and low barriers to entry help early-stage founders move fast without being bogged down in complexity
- **3PLs** remain a trusted option for brands that value long-standing operational experience and want a steady partner for omni-channel fulfillment. Their asset-based model and empathy for entrepreneurial brands can provide stability when growth is still unpredictable.
- **4PLs**, however, are uniquely positioned to serve brands once they reach the critical inflection points of scaling and maturing. By combining technology with a vetted global network, 4PLs give brands the ability to flex up or down, enter new markets quickly, integrate new sales channels, and centralize data in a way that neither TEFs nor traditional 3PLs can fully match.



For growing brands, this means no longer being held back by the limitations of a single warehouse or rigid provider. For established brands, it means strategic oversight, operational transparency, and a partner who can optimize every cost center while keeping customer experience at the center of the supply chain.

In an era where product life cycles are short, customer expectations are high, and global trade conditions are shifting daily, flexibility and strategic partnership aren't "nice to haves" - they're essential. That's why, while all three fulfillment models have a place in the ecosystem, it's the 4PL model that gives growing and established brands the agility, visibility, and scale to thrive in 2025 and beyond.

Let's Find a Way - Together

Your next stage of growth deserves logistics that scale with you.
Let's build your fulfillment strategy for what's next.

Get in touch	wayfindr.io/contact
Or Email Us	info@wayfindr.io

Check out our happy customers

[View Case Studies](#)

