North America E-commerce Fulfillment Services Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** E-Commerce Logistics & Warehousing (Logistics & Supply Chain)
> **Source:** https://www.mordorintelligence.com/industry-reports/north-america-e-commerce-fulfillment-services-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 53.40 billion
Projected Forecast (2031)	USD 53.40 billion
Growth Rate (CAGR)	10.80 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in North America E-commerce Fulfillment Services industry](images/chart_2.png)

![North America E-commerce Fulfillment Services Market Size](images/chart_3.png)

![North America E-commerce Fulfillment Services Market Share by Service Type, 2025](images/chart_4.png)

![North America E-commerce Fulfillment Services Market Share by Fulfillment Model, 2025](images/chart_5.png)

![North America E-commerce Fulfillment Services Market Share by Enterprise Size, 2025](images/chart_6.png)

![North America E-commerce Fulfillment Services Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 47.57 Billion |

Market Size (2026) | USD 53.40 Billion |
Market Size (2031) | USD 89.19 Billion |
Growth Rate (2026 - 2031) | 10.80 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

North America E-commerce Fulfillment Services Market Analysis by Mordor IntelligenceThe North America e-commerce fulfillment services market size is projected to grow from USD 47.57 billion in 2025 to USD 53.4 billion in 2026, and then to USD 89.19 billion by 2031, registering a 10.8% CAGR between 2026 and 2031.

Robust demand stems from social-commerce monetization, subscription-box standardization, and omni-channel orchestration that together redefine how brands position inventory and serve shoppers. Recurring volumes generated by subscription boxes enable fulfillment centers to fine-tune labor scheduling and lower carrier costs. At the same time, micro-batch drops on TikTok Shop and Instagram Checkout push providers to achieve sub-24-hour pick-to-ship cycles. Autonomous mobile robots (AMRs) that completed more than 4 billion picks in 2024 continue to raise unit-per-hour productivity and delay large capital spending on green-field facilities. Returns analytics platforms now recoup USD 15-25 per item through refurbishment, resale, and data monetization, turning reverse logistics into a profit lever rather than a cost center.

Key Report Takeaways

* By service type, shipping fulfilment services captured 42.74% of the North America e-commerce fulfillment services market share in 2025, while bundling fulfilment services are forecast to advance at a 13.83% CAGR to 2031.
* By fulfillment model, dropshipping is expected to post a 21.98% CAGR through 2031, even as third-party fulfillment held 60.56% share of the North America e-commerce fulfillment services market size in 2025.
* By sales channel, business-to-business accounted for 61.93% market share in 2025, yet direct-to-consumer shipments are projected to grow at a 15.11% CAGR up to 2031.
* By enterprise size, large enterprises commanded 67.54% of the North America e-commerce fulfillment services market in 2025, whereas small and medium enterprises are on track for a 14.38% CAGR during the forecast window.
* By end-use, electronics and household appliances are anticipated to expand at a 15.34% CAGR to 2031, outpacing fashion and lifestyle products that nonetheless led with 20.91% market share in 2025.
* By geography, the United States controlled 88.90% market share in 2025, while Mexico is projected to be the fastest-growing country at a 15.84% CAGR through 2031.

Key Market Trends

North America E-commerce Fulfillment Services Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Social-commerce boom spawning micro-batch DTC fulfillment demand	+2.3%	United States and Canada urban centers, emerging in Mexico City	Short term (≤ 2 years)
Subscription-box economy creating predictable recurring volumes	+1.9%	North America-wide, concentrated in consumer packaged goods	Medium term (2-4 years)

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Federal and state tax credits accelerating cold-chain FC build-outs | +1.5% | United States with renewable energy incentives, Canadian provinces | Long term (≥ 4 years) |
Returns-analytics platforms turning reverse logistics into profit centers | +1.7% | Major metropolitan areas across the United States and Canada | Medium term (2-4 years) |
Omni-channel BOPIS and ship-from-store orchestration lifting FC throughput | +1.8% | Retail-dense markets in the United States, Canada, expanding to Mexico | Short term (≤ 2 years) |
Autonomous mobile robots slashing pick-time and labor reliance | +1.6% | Large fulfillment hubs in the United States and Canada, pilot deployments in Mexico | Medium term (2-4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Competition remains moderate, with national parcel giants, asset-light tech disruptors, and vertical specialists vying for wallet share. FedEx injected capital into Nimble to integrate fully autonomous cells, signaling its intent to blend robotics with its existing carrier backbone. Stord’s acquisitions of Ware2Go and Pitney Bowes’ Kentucky megafacility expand its network and analytics layer, challenging incumbents by offering outcome-based SLAs.

Returns analytics firms, cold-chain specialists, and platform integrators target white spaces such as drug fulfillment, subscription kitting, and cross-border orchestration. Technology shapes competitive advantage: operators deploying AMRs report 2-3× productivity, while AI demand models cut working capital by 20%. Strategic focus is shifting from raw floor space toward orchestration software that spans stores, DCs, and carrier nodes, aligning with client demand for integrated visibility.

Incumbents pursue M&A to secure capability breadth, evidenced by DHL’s purchase of IDS Fulfillment for SME reach and RXO’s USD 1.025 billion takeover of Coyote Logistics to combine brokerage with e-commerce freight. Providers that fuse logistics assets with proprietary software are best placed to capture emerging bundles and defend margin.

North America E-commerce Fulfillment Services Industry Leaders* GXO Logistics

* Flexport

* Amware Fulfillment

* DHL Group

* FedEx

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

North America E-commerce Fulfillment Services Market Report ScopeBy Service Type
Warehousing and Storage Fulfilment Services |
Bundling Fulfilment Services |
Shipping Fulfilment Services |
Other Niche / Value-added Services |

Segmentation Accordion Item

By End-Use IndustryFoods and Beverages |
Personal and Household Care |
Fashion and Lifestyle (Accessories, Apparel, Footwear) |
Furniture and Home Decor |
Electronics and Household Appliances |
Other Products |

Frequently Asked Questions

What CAGR is projected for North American e-commerce fulfillment through 2031?

The market is forecast to grow at a 10.8% CAGR between 2026-2031.

Which service type is expanding the fastest?

Bundled fulfillment services are expected to lead with a 13.83% CAGR to 2031.

Why is drop shipping accelerating in North America?

Tariff reforms that removed de minimis relief for sub-USD 800 imports push brands to reposition inventory domestically via dropship networks.

How are returns becoming profitable for 3PLs?

Analytics platforms route returns to the highest-value disposition and capture 65-75% of original product value.

What makes Mexico attractive for new fulfillment centers?

Nearshoring, lower labor costs, and improving infrastructure support a 15.84% CAGR, the fastest in the region.

How do autonomous mobile robots affect picking productivity?

AMRs raise collaborative pick rates to 120-180 units per hour, roughly double manual throughput.