North America E-commerce Warehouse 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-warehouse-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 13.45 billion
Projected Forecast (2031)	USD 13.45 billion
Growth Rate (CAGR)	4.10 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

![North America E-commerce Warehouse Market (2026 - 2031)](images/chart_3.png)

![North America E-commerce Warehouse Market: Market Share by Warehouse Type](images/chart_4.png)

![North America E-commerce Warehouse Market: Market Share by Automation Level](images/chart_5.png)

![North America E-commerce Warehouse Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

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

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 12.90 Billion |
Market Size (2026) | USD 13.45 Billion |
Market Size (2031) | USD 16.45 Billion |
Growth Rate (2026 - 2031) | 4.10 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

North America E-commerce Warehouse Market Analysis by Mordor IntelligenceThe North America E-commerce Warehouse Market size is projected to be USD 12.9 billion in 2025, USD 13.45 billion in 2026, and reach USD 16.45 billion by 2031, growing at a CAGR of 4.1% from 2026 to 2031.

The market’s measured expansion masks a fundamental restructuring of warehouse economics as pallet-level B2B orders and high-velocity consumer shipments now compete for the same industrial footprints. Multi-tenant facilities gain traction because they can toggle between bulk pallet storage and piece-pick fulfillment, while single-client distribution centers struggle to keep utilization high. Subscription and direct-to-consumer (DTC) brands are turning warehouses into light-manufacturing hubs for kitting and personalization, and widespread free-return policies compel retailers to dedicate 15-20% of total footage to reverse-logistics zones. In parallel, carbon-credit-funded green facilities and FAA-aligned drone-hub rooftops are starting to command rental premiums, injecting new factors into site-selection calculus.

Key Report Takeaways* By warehouse type, fulfillment centers held 43.47% of the North America E-commerce Warehouse Market share in 2025, while dark stores and micro-fulfillment centers post the highest projected CAGR at 9.34% through 2031.
* By service type, storage services accounted for 46.15% share of the North America E-commerce Warehouse Market size in 2025, yet value-added services are set to expand at an 8.81% CAGR through 2031.
* By automation level, semi-automated operations led with a 51.01% share in 2025, whereas fully automated sites are forecast to accelerate at an 8.42% CAGR between 2026 and 2031.
* By end-user industry, apparel and footwear captured 27.2% of the North America E-commerce Warehouse Market size in 2025; grocery and FMCG are advancing at an 8.92% CAGR to 2031.
* By country, the United States commanded 79.44% of the North America E-commerce Warehouse Market share in 2025, while Mexico is projected to expand at a 5.29% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of North America E-commerce Warehouse Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
B2B E-Commerce Surge Expanding Pallet-Level Storage Needs | +0.9% | United States and Canada, spillover to Mexico border zones | Medium term (2–4 years) |
Subscription and DTC Brand Growth Driving Kitting and Personalization Capacity | +0.7% | United States coastal hubs | Short term (≤ 2 years) |
Free-Return Culture Escalating Reverse-Logistics Square Footage | +0.6% | North America, highest in United States | Short term (≤ 2 years) |
Oversized Imports Spurring High-Bay Warehouse Demand | +0.5% | United States port markets, Canadian import gateways | Medium term (2–4 years) |
Carbon-Credit-Funded Green Warehouse Projects Unlocking Cap-Ex | +0.4% | United States and Canada, ESG-focused regions | Long term (≥ 4 years) |
Rooftop Drone-Hub Integration Along FAA Delivery Corridors | +0.3% | United States, FAA-approved corridors | Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Competition is moderate and tightening as traditional 3PLs, cold-storage REITs, parcel integrators, and software-driven fulfillment platforms converge on automation as a differentiator. Large incumbents leverage multi-region networks and buying power to secure robotics at scale, which in turn reduces cost-per-order and locks in high-volume clients. Mid-tier providers carve niches in value-added services, offering kitting or returns management that commands premium pricing and deeper client stickiness.

White-space opportunities remain in high-bay buildings tailored to oversized imports, rooftop drone hubs near FAA corridors, and LEED-certified dark stores favored by ESG-minded grocers. Asset-light networks aggregating third-party capacity through software gain mindshare, yet face margin squeeze if they cannot guarantee robotics uptime. The shortage of maintenance technicians, therefore, bestows an edge on vertically integrated operators with in-house engineering teams, shielding them from the 15-20% downtime plaguing less prepared peers.

M&A continues as incumbents bolt on cold-chain assets, regional cross-border space, and specialized pharmaceutical nodes. Insurance pricing and regulatory risk have become diligence focal points, with acquirers discounting valuations for warehouses in high-hazard counties or privacy-heavy jurisdictions. Capital inflows from infrastructure funds and sovereign investors support green-warehouse roll-outs, further professionalizing the competitive field inside the North America E-commerce Warehouse Market.

North America E-commerce Warehouse Industry Leaders* GXO Logistics

* DHL Group

* CMA CGM Group (including CEVA Logistics)

* FedEx

* United Parcel Service of America, Inc. (UPS)

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

North America E-commerce Warehouse Market Report ScopeBy Warehouse TypeFulfilment Centers |
Distribution Centers (DCs) |
Cold-Chain Warehouses |
Dark Stores / Micro-Fulfillment Centers |
Others (Reverse Logistics Hubs, Bonded Warehouses, Hybrid-use Spaces, etc.) |

Segmentation Accordion Item

By End-User IndustryApparel and Footwear |
Consumer Electronics |
Grocery and FMCG |
Pharmaceuticals, Beauty and Wellness |
Home Essentials and Furnishings |
Others |

Frequently Asked Questions

What CAGR is forecast for the North America E-commerce Warehouse Market between 2026 and 2031?

The market is projected to grow at a 4.1% CAGR over the 2026–2031 period.

Which warehouse type is expanding fastest through 2031?

Dark stores and micro-fulfillment centers are expected to post the highest growth at a 9.34% CAGR.

Why are value-added services gaining traction in warehousing?

DTC brands seek kitting, personalization, and assembly that command premium fees and deepen customer loyalty.

How are insurance premiums affecting facility location decisions?

Premium hikes of up to 40% in climate-exposed regions are prompting operators to favor inland or lower-risk zones.

What factor is driving demand for high-bay warehouses?

Rising online sales of furniture and fitness equipment require 40-foot-plus clear heights for efficient vertical storage.

How do carbon credits influence new warehouse construction?

Developers can monetize environmental credits to offset 15–20% of green-build costs, narrowing the rent gap with standard sites.