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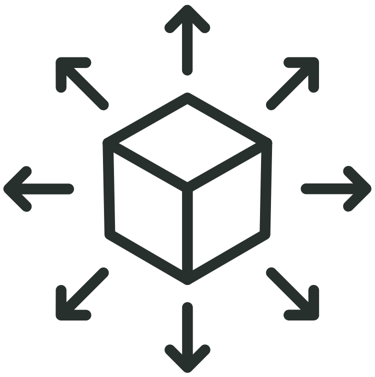
2026/2027 OMNICHANNEL TRENDS REPORT

Warehousing, Retail Flow, and the Next Season of Fulfillment Pressure

Executive Summary

Omnichannel is no longer a retail strategy. It is the operating model behind how inventory moves, where inventory is positioned, and how quickly brands can respond when demand shifts. In 2026 and 2027, the brands best positioned for growth will not simply be the ones with more channels. They will be the ones with cleaner inventory visibility, more flexible fulfillment capacity, smarter regional warehousing, and stronger alignment between seasonal demand planning and physical distribution.

Retail growth is still expected in 2026, but it is not frictionless. NRF forecasts U.S. retail sales will grow 4.4% over 2025 to $5.6 trillion. At the same time, e-commerce continues to outpace total retail growth, with U.S. Census reporting Q1 2026 e-commerce sales up 9.7% year over year compared with 4.0% growth for total retail sales. That gap matters. Digital demand is growing faster than the broader retail base, and every digital order eventually becomes a warehouse, fulfillment, transportation, returns, or inventory-positioning decision.



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What is Changing in Omnichannel?

Retailers are entering a period where the customer journey is more fragmented, but the operational expectation is more unified. Consumers discover products on social platforms, compare prices across marketplaces, buy through mobile, pick up in store, return through a different channel, and expect the brand to recognize the entire journey as one experience.

Key shifts shaping 2026/2027:

- E-commerce conti.nues to grow faster than total retail.
- Social commerce is becoming a real demand channel, not just a discovery tool.
- Physical stores are becoming fulfillment, return, and experience nodes.
- Returns are now a structural cost center, especially in apparel, beauty, accessories, and consumer goods.
- Warehouse networks are moving from static storage models to flexible, regionalized inventory positioning.
- Automation and AI are gaining traction, but operational discipline still matters more than technology hype.

Retail Growth Signals

Metric	2026 Signal	Why It Matters
U.S. retail sales forecast	$5.6T, +4.4% YoY	Demand is still growing, but margin pressure remains.
Q1 2026 U.S. e-commerce sales	$302.3B	Digital volume remains structurally elevated.
Q1 2026 e-commerce growth	+9.7% YoY	E-commerce is growing faster thantotal retail.
Q1 2026 total retail growth	+4.0% YoY	Omnichannel operations must support faster digital growth.
E-commerce share of retail	16.8%	Online demand is a permanent warehouse planning factor.

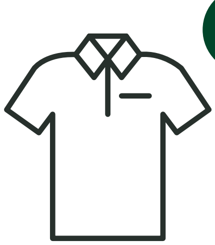
Why Omnichannel Is a Warehouse Conversation

The next phase of omnichannel will be won or lost inside the warehouse network. Brands can market across channels, but they cannot fulfill across channels without the right space, systems, labor model, and inventory placement.

CBRE expects U.S. industrial vacancy to stabilize in the mid-6% range in 2026, with tenants renewing at high levels, upgrading into more modern facilities, and outsourcing distribution to 3PL providers. JLL also reported strong Q1 2026 industrial activity, with 145.2 million square feet of leases executed and 50.9 million square feet of net absorption. The signal is clear: warehouse decisions are becoming more strategic again after the post-pandemic reset.

For retail, CPG, apparel, beauty, pet, sporting goods, home, and seasonal brands, the warehousing conversation is shifting from “How much space do we need?” to “Where does inventory need to sit before demand spikes?”

Top Verticals to Watch



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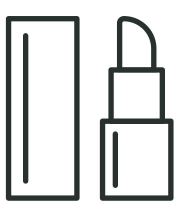
Apparel, Footwear, and Accessories

Fashion remains one of the most operationally complex omnichannel categories because demand is size-, color-, style-, season-, and return-sensitive. McKinsey projects low single-digit global fashion growth in 2026, with continued pressure from value-conscious consumers. That creates a difficult mix: tighter margins, higher SKU complexity, and elevated fulfillment expectations.

> **Warehousing implication:** apparel brands need stronger inventory accuracy, efficient returns processing, flexible overflow capacity, and store-ready replenishment models.



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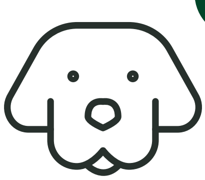
Beauty and Personal Care

Beauty continues to outperform many retail categories. Circana reported Q1 2026 U.S. prestige beauty sales up 6% to $8.1 billion and mass beauty sales up 7% to $18.1 billion. Beauty is also deeply tied to social commerce, influencer-driven discovery, and rapid trend cycles.

> **Warehousing implication:** brands need fast-turn inventory flow, lot/expiration awareness where relevant, channel-specific packaging, kitting, and promotional fulfillment support.



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Pet Products

The pet category remains resilient but is shifting from post-pandemic acceleration into more value-conscious, selective growth. APPA reports 95 million U.S. households own a pet, while Packaged Facts places U.S. pet industry sales at $155 billion in 2025. E-commerce continues to outperform within the category.

> **Warehousing implication:** pet brands need capacity for bulky goods, high-SKU consumables, subscription-style replenishment, marketplace compliance, and retail distribution.

4 Sporting Goods and Outdoor

Sporting goods growth is expected to moderate, with McKinsey estimating roughly 6% annual growth from 2024 to 2029. The category still benefits from active lifestyle demand, team sports cycles, outdoor recreation, and seasonal buying patterns.

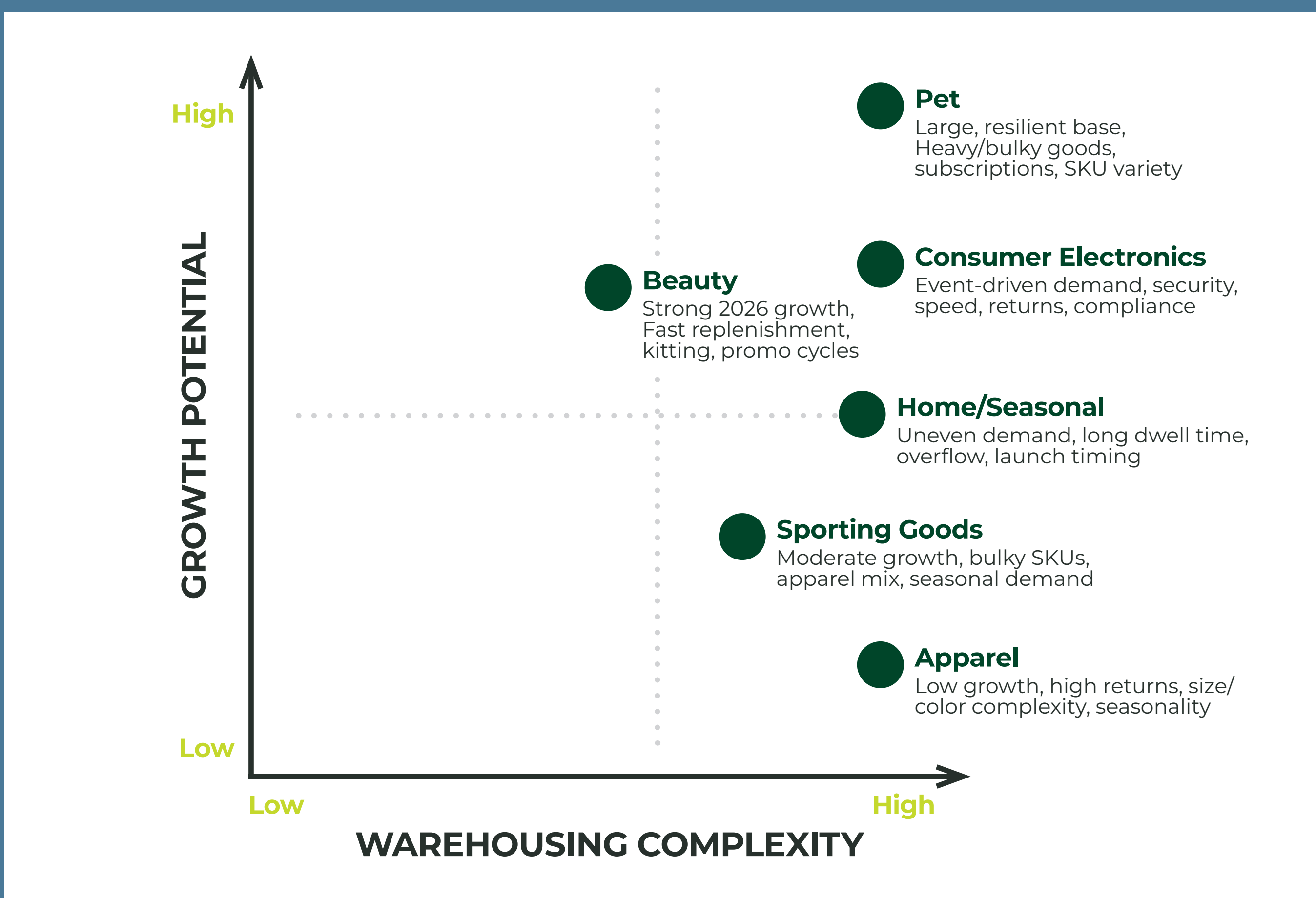
> **Warehousing implication:** brands need support for bulky equipment, apparel, accessories, seasonal inventory builds, and retail replenishment.

5 Home, Furniture, Décor, and Seasonal Goods

Home categories remain sensitive to interest rates, consumer confidence, housing activity, and promotional timing. Seasonal décor, patio, furniture, and home improvement products create warehouse stress because inventory arrives early, occupies space longer, and often requires coordinated release windows.

> **Warehousing implication:** brands need overflow storage, fixture or display consolidation, cross-docking, and staged outbound execution.

Vertical Pressure Matrix



Seasonality Planning: 2026/2027 Demand Windows

Omnichannel seasonality starts before the consumer sees the promotion. Back-to-school, Prime Day, Halloween, holiday, spring reset, summer outdoor, and Q2 retail programs all require inventory planning months ahead of demand.

Key planning windows:

Q3 2026

Back-to-school, early holiday inventory, fall resets, Halloween.

Q4 2026

Holiday peak, returns preparation, spring/summer 2027 planning.

Q1 2027

Returns processing, inventory cleanup, retail reset planning, warm-weather goods staging.

Q2 2027

Outdoor, home improvement, graduation, summer travel, early back-to-school inventory.

Q3 2027

Back-to-school, fall retail, early holiday positioning.

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Operational Trends Defining 2026/2027

Regionalized Inventory

Brands are moving away from one-size-fits-all national fulfillment models. Inventory placement closer to demand reduces transit time, improves service levels, and gives brands more control during peak.

Returns as a Network Function

Returns are no longer a back-end issue. They affect labor, inventory visibility, resale timing, margin recovery, and customer retention.

Store-Ready Fulfillment

Retailers are pushing for cleaner compliance, better packaging, fewer delays, and more accurate replenishment. Store-ready inventory reduces downstream friction.

Flexible Space

The warehouse market is stabilizing, but brands still need optionality. The next two years will reward companies that can flex between dedicated, shared, overflow, and project-based space.

AI-Enabled Planning

AI will influence forecasting, personalization, inventory planning, customer service, and demand sensing. But AI cannot fix poor inventory discipline. The strongest operators will pair smarter tools with cleaner processes.

Closing Perspective

The next era of omnichannel will be less about channel expansion and more about operational control. The brands that win in 2026 and 2027 will be the ones that know where inventory is, where it needs to go, how quickly it can move, and what happens when demand does not follow the forecast.

For retail, consumer goods, and seasonal brands, warehousing is no longer just a cost center. It is the physical infrastructure behind customer experience, margin protection, and growth.

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