Rewriting the rules of fashion fulfilment

How timing, trust and orchestration will define the next decade

OneStock

For years, fashion was defined by creativity, identity and brand storytelling. But today, when trends are born overnight and expectations are shaped by platforms, not runways, a new force has taken centre stage: fulfilment.

Operational excellence has become the new battleground. Consumers no longer separate the product they want from the experience of receiving it. A missed delivery, a broken promise, or a delayed arrival is a brand failure.

The most forward-thinking fashion brands have recognised this shift. They're not just asking, "How do we keep up with demand?". They're asking "How do we keep every promise across every channel, every touchpoint, every region while protecting margin and controlling costs?"

Because that's the paradox. Fulfilment is now a strategic lever for differentiation, loyalty and growth but it must deliver all of that without eroding profitability.

This whitepaper is our answer to that tension. It draws from the expertise of leading retailers, OneStock's frontline experience with some of the world's most ambitious fashion brands, and the macro trends reshaping global commerce. What emerges is a new blueprint for retail: one where fulfilment is the heartbeat of the brand.
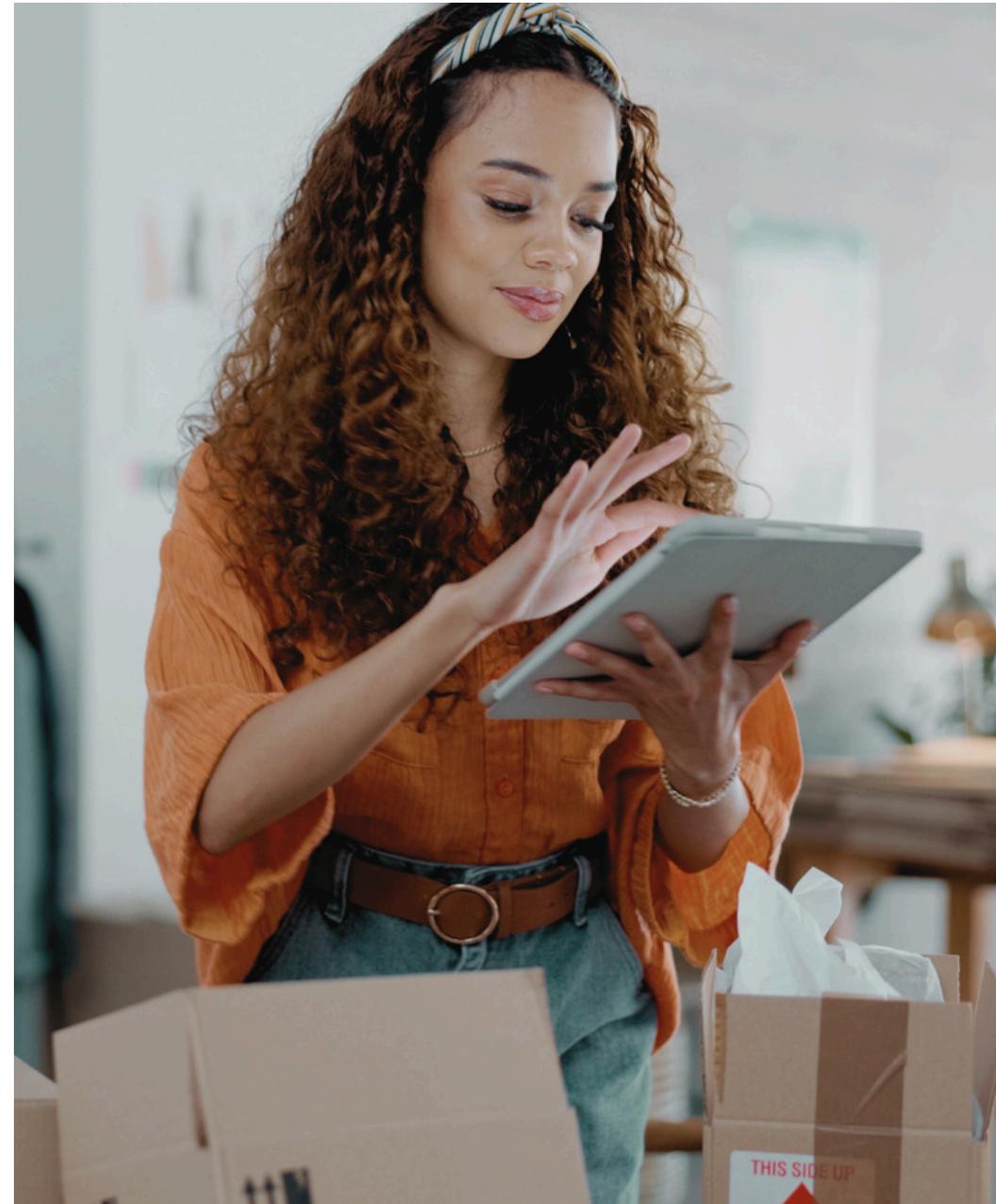
The next era of fashion is operational

In a world where trends go viral in minutes and consumer expectations evolve at the speed of a scroll, the fashion industry is undergoing a profound transformation. The old rules built on branding, aesthetics, and seasonal drops are being rewritten by a new logic of fulfilment, agility, and operational sophistication.

A shift from aesthetics to logistics

This shift isn't theoretical. It's playing out in boardrooms and tech evaluations across the globe. Today's fashion leaders don't only ask, "How do we make our brand more desirable?" They also ask, "How do we make our promise deliverable, on time, at scale, and without waste?"

This new chapter in fashion is shaped by three converging forces: a move from aesthetics to logistics, a rising tide of pressure from platform-native giants, and the growing expectation that fulfilment must serve not only convenience, but also sustainability and circularity while optimizing profitability. Together, they signal a turning point where the brand experience begins with what's behind the scenes.

Creativity still defines a fashion brand's identity. But increasingly, operational precision defines its credibility. What good is a viral product drop if the fulfilment system collapses under pressure? What is the value of premium branding if delivery promises are broken?

From 2022 onward, our fashion customers and prospects have consistently reframed their strategic objectives. Where growth once meant expanding product lines or investing in digital campaigns, today it means protecting margins, minimising waste, and executing reliably across channels. Fashion leaders are re-evaluating their tech stacks not to be more "innovative," but to be more agile, efficient, and trustworthy.

From how fashion reacts to competition, to the orchestration intelligence that optimizes profitability and turns stores into agile fulfilment nodes, to the logistics logic powering resale and circularity, here is a field guide for those shaping the next era of fashion commerce.

01 Pressure from Shein, Temu, TikTok and Amazon Prime

> ## In Europe, "first wave" online fashion marketplaces are losing share to low-cost, high-growth players like Shein and Temu, as well as traditional retailers.
>
> The State of Fashion 2025 – McKinsey & Company

The expectations shaping today's fashion fulfilment are not being set by traditional retailers. They are being set by platform-native giants who have redefined what "good" looks like:

prime   **SHEIN**   **TEMU**   ♪ **TikTok**

Amazon Prime has trained consumers to expect speed, reliability and transparency. Customers don't differentiate between fashion and other verticals, they expect the same promise-keeping infrastructure.

Shein and Temu have built ultra-responsive supply chains that compress trend-to-delivery cycles to an extreme. While not necessarily fast in shipping, their ability to offer extreme assortment agility at scale has changed the game.

TikTok is no longer just a marketing channel, it's a commercial accelerator. A product trend can go viral in hours, forcing brands to respond with real-time inventory availability and rapid fulfilment.

Together, these platforms have created an environment where fulfilment is no longer a backstage function. It's part of the customer experience, brand equity and competitive strategy.

Fashion brands we engage with often cite Amazon not as a competitor, but as the reference standard for what a customer expects: frictionless, accurate, always-on delivery. They acknowledge that platforms like Shein or Temu have made logistics look deceptively simple, which raises the bar for everyone else.

This pressure isn't just technical. It's existential. Missed delivery promises, low fulfilment accuracy, or long lead times are no longer minor issues. They're loyalty killers.

02 The rise of sales channels

> ❝
> *TikTok Shop said in a press release in late November that its sales had reached $100 million on Black Friday, the day after Thanksgiving. Previously, it said the number of people purchasing goods on TikTok Shop each month had nearly tripled.*

Reuters

Fashion now runs on algorithms, not seasons. Platforms like TikTok, Instagram, and emerging creator marketplaces have become fashion's new launchpads. A single video can ignite demand at a velocity that bypasses traditional go-to-market processes. Microtrends are no longer curiosities, they are commercial imperatives, each one creating a flashpoint of opportunity and risk.

This real-time, trend-driven ecosystem introduces a paradox: fashion demand is both more abundant and more unstable than ever before. Brands can't rely on rigid launch calendars or over-forecasted volumes. They need to respond in the moment: allocating inventory intelligently, promising delivery precisely, and ensuring execution without friction.
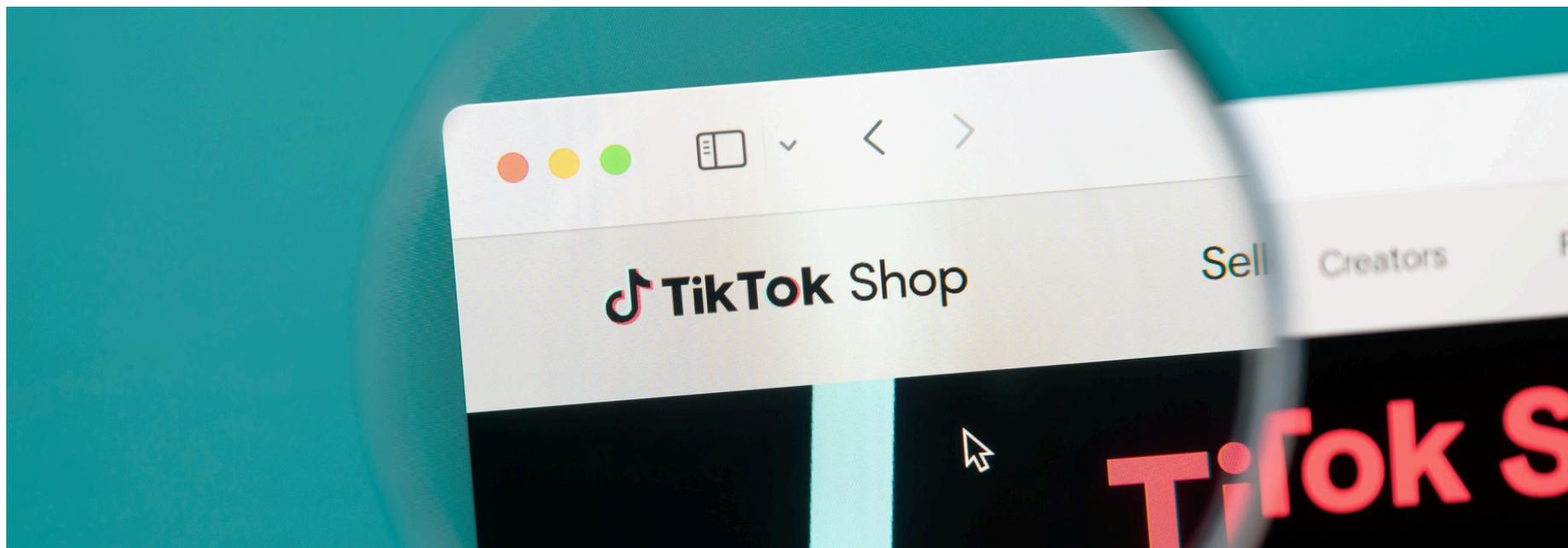
03 Availability and promise are the new loyalty KPIs

Loyalty in fashion used to be built on brand, price or even novelty. Today, it's built on reliability. The defining expectation for modern customers is not just whether a product is available but whether a brand can deliver on the promise it made. And when that promise is broken, loyalty doesn't erode slowly. It collapses.

"

32% of consumers say they will walk away from a brand they love after just one bad experience.

PwC

Customer loyalty is fragile in a world of frictionless switching. The cost of entry for consumers has never been lower: one bad delivery, one stockout, one failed promise, and they move on.

Retailers understand this instinctively, but often fail to connect the dots between logistics execution and brand perception. Broken promises, such as delayed delivery, online availability mismatches, or cancelled orders, are operational failures that translate directly into brand damage.

This is especially true in fashion, where timing matters. If an item isn't delivered in time for an event, or if a seasonal product arrives too late, the value to the customer is lost. And so is their future business.

With customer acquisition costs rising and first-order profitability shrinking, brands cannot afford to lose customers to fulfilment errors. Delivering what was promised accurately, on time, and from the optimal location, is now a core pillar of retention strategy.

04 Store networks as smart logistics engines

Physical stores are fashion's most underutilised asset. After two decades of ecommerce dominance and operational centralisation, the retail pendulum is swinging back. But this time, it's not about footfall, but about fulfilment.

In the past, store fulfilment was treated as a contingency plan: a fallback when warehouses failed or DCs were overwhelmed. But in a retail landscape shaped by volatility, unpredictability, and soaring delivery expectations, contingency has become strategy.

Store enablement today isn't just a cost efficiency lever. It's an agility engine.

By turning stores into fulfilment nodes, fashion brands can unlock a powerful set of operational and commercial advantages:

Accelerate last-mile speed and convenience
Local fulfilment through Ship from Store or Click and Collect dramatically shortens delivery times, reduces last-mile costs, and enhances customer satisfaction with same-day or next-day options.

Maximise product availability, where and when it matters
By pooling inventory across stores and central locations, brands can resolve size and variant mismatches, reduce stockouts, and increase conversion across channels.

De-risk warehouse overload and carrier capacity crunches
During peak periods or disruptions, store-based fulfilment absorbs pressure from DCs and diversifies reliance on national carriers, making the network more resilient and responsive.

Cut reverse logistics costs through smart returns
By using stores as return hubs or drop-off points, retailers can reduce return shipping costs, accelerate resale or reintegration into stock, and create seamless in-person CX touchpoints.

From a CX perspective, this changes everything. Customers not only receive their orders faster, they experience a brand that delivers with precision, flexibility and confidence.

And critically, store enablement unlocks margin. When stock moves from shelf to parcel without touching a warehouse, fulfilment becomes capex-light. In an era of tightening budgets and shrinking profits, that flexibility is financially vital.

The agility imperative is also reframing store investments. Store teams are no longer secondary in digital transformation. They are central actors in omnichannel success.

05 Logistics logic under pressure: rethinking fulfilment to defend margins

Margins in fashion retail are under attack. Transport costs are volatile, tariffs are rising, and fulfilment has become one of the largest line items dragging on profitability. The brands that stay ahead won't just optimise logistics, they'll orchestrate smarter and:

Rethink carrier allocation
Today's leaders allocate them dynamically. Based on stock origin, destination, cost, and SLA, retailers are using OMS to assign the most efficient carrier in real time. Every parcel routed intelligently means margin protected.

Match fulfilment cost to order value
Not all orders deserve the same fulfilment path. High-value orders may justify premium services or split shipments but for low-margin baskets, efficiency is king. Smart orchestration helps apply logic that adapts to AOV and profitability rules automatically.

Activate cost-lowering scenarios?
From consolidation to cross-docking, retailers are using DOM to execute scenarios that reduce cost-to-serve. These include:
- Grouping items to avoid multi-package fees
- Pooling low-demand SKUs to reduce shipping frequency
- Cross-docking to streamline last-mile operations

These are all margin strategies:

Use stores to bypass tariffs?
In a post-Brexit world, cross-border orders can carry customs costs that destroy margin. Brands are turning stores into local fulfilment nodes to avoid duties and shorten delivery times. The right DOM can prioritise this logic automatically.

Stop avoidable cancellations?
Cancellations waste acquisition spend and logistics effort. DOM rules that validate availability, reroute orders, or surface exceptions early help avoid lost revenue and customer trust.

06 Growing expectations of recommerce, resale and sustainability

Sustainability is no longer a marketing buzzword. It's becoming embedded in the operational strategies of fashion retailers. However, the sustainability agenda is shifting from storytelling to accountability.

Fashion brands increasingly face pressure to:

Provide traceability across the product lifecycle

Support returns orchestration that minimises waste

Explore resale models as both margin recovery and brand initiative

Regulatory drivers in Europe and growing consumer scrutiny are accelerating this transformation. DOM is emerging as a strategic enabler of circularity: it determines what happens to a returned item, how inventory is repurposed, and how fulfilment decisions impact CO_2 emissions.

In this context, recommerce is not a separate initiative. It's an orchestration challenge.
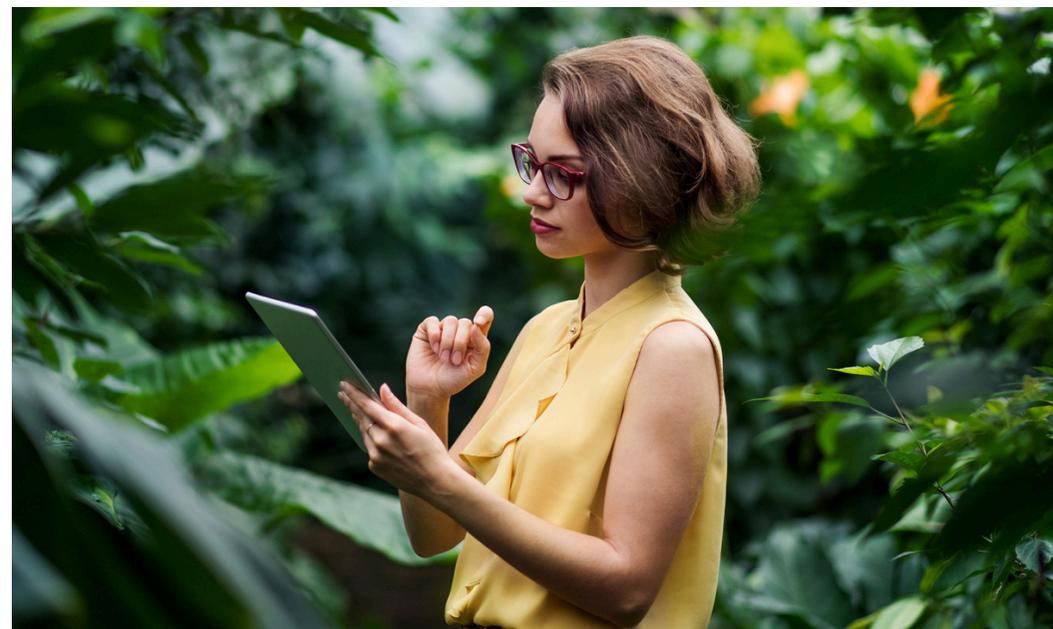
Retailers are asking:

"Can we reroute returns to high-probability resale stores?"

"Can we manage secondhand and new stock in a unified pool?"

"Can we track and report on the environmental impact of our fulfilment choices?"

These aren't theoretical questions. They are operational realities.

Reframing DOM as the brain

This acceleration of the market is triggering a deeper transformation: DOM is no longer seen as an execution tool but as the strategic operating system of modern retail.

Fashion brands once treated fulfilment as a supply chain concern. Today, they recognise that fulfilment is brand performance. Every promise kept (or missed) shapes perception, loyalty and repeat purchases. And the system that manages that promise (DOM) has become a boardroom topic.

At OneStock, we see a shift in the language our clients use:

"OneStock is our operations brain."

"It's where decisions happen, not just data."

"It governs how we trade not just how we ship."

The implications are structural and DOM is now expected to:

Optimise fulfilment across channels, carriers, and countries in real time

Execute business logic based on seasonality, profitability, and carbon impact

Provide decision-makers with actionable dashboards, not just status updates

This reframing also alters the buying process. More often, it is Operations, Supply Chain, and Finance that lead DOM evaluations. They look for:

Faster time to value
(ROI in the same fiscal year)

Business-user autonomy
(low-code configurability)

Orchestration precision
(for influencer drops, capsule collections, sustainability goals)

DOM is no longer a question of "can it integrate with my ecommerce stack?" but "can it support how I run my business tomorrow, not just today?"

Fashion brands embracing this view are future-proofing their agility. They don't just want speed? they want smart speed, strategic speed.

As trends accelerate, loyalty fragments, and margins narrow, timing becomes brand equity. In this future, DOM is the modern fashion brain: sensing, deciding, delivering and always learning.

Turning fulfilment into a strategic engine: Why DOM leads the fashion tech stack

01 Pressure from Shein, Temu, TikTok and Amazon Prime

02 The rise of sales channels

03 Availability and promise are the new loyalty KPI

04 Store networks as smart logistics engines

05 Logistics logic under pressure: rethinking fulfilment to defend margins

06 Growing expectations of recommerce, resale and sustainability

Summary of challenge

Platform giants like Amazon and Shein have made fast, reliable fulfilment central to brand experience and consumer expectations.	**Fashion now moves at the speed of world changes**, requiring brands to be where their consumers are—across marketplaces, social platforms, and conversational channels—to capture and convert real-time demand.	**In today's fashion landscape**, customer loyalty hinges on fulfilment reliability —one broken promise can instantly shatter trust and drive customers away.	**Fashion stores** are evolving from passive showrooms to active fulfilment hubs, becoming key drivers of speed, agility, and profitability in an omnichannel strategy.	**With fashion margins under pressure**, leading brands are using smart fulfilment orchestration to control costs, protect profitability, and turn logistics into a margin lever—not a liability.	**Sustainability in fashion is shifting from storytelling to operational** accountability, with smart fulfilment orchestration (DOM) playing a key role in enabling traceability, circularity, and emissions-aware decision-making.

How A DOM manage that deals with the challenge

Customer promise engine calculates delivery dates in real time based on actual inventory and carrier performance. **Real-time orchestration engine** dynamically routes orders to the optimal fulfilment node (store, DC, or dropship partner) based on proximity, stock, and SLA. **Multi-node fulfilment logic** ensures no single warehouse becomes a bottleneck, maintaining consistent delivery experience even during viral surges.	**Multi unified inventory pools** allowing to dedicate dynamically a stock to every channel. **Channel prioritisation logic** can reserve inventory for strategic channels (e.g., TikTok or marketplace promotions) to capture viral demand. **Dynamic inventory allocation** rules prevent overselling by updating stock positions across all sales channels instantly.	**Unified inventory visibility** consolidates data from warehouses, stores, and third-party stock into a single real-time source of truth. **Dynamic promise calculation** provides precise delivery dates and pickup options at checkout, boosting trust and conversion. **Intelligent orchestration** considers the promise to ensure it while detecting risks early and triggers alternative routing or proactive communication to keep the promise	**Ship from Store orchestration** automatically routes online orders to the optimal store based on proximity, workload, and margin logic. **Click and Collect / Reserve and Collect workflows** integrate store teams into the omnichannel journey, improving speed and experience. **Store app for fulfilment** provides intuitive mobile tools for picking, packing, and confirming orders without operational friction.	**Carrier allocation by zone and cost** dynamically selects the cheapest and most reliable carrier per route and per order. **Order value–driven fulfilment** logic aligns shipping choices to margin potential (premium service for high-value, efficient consolidation for low-value). **Cross-docking and consolidation features** allow holding or grouping orders to minimise parcel counts and last-mile cost. **Tariff aware routing** automatically prioritises in-country stores to bypass duties and reduce total landed cost.	**Intelligent returns routing** directs products to resale-friendly locations or optimal reintegration points. **Unified stock pool for new & secondhand inventory** enables brands to sell recommerce items with the same agility as primary stock. **Sustainability aware fulfilment rules** prioritise local fulfilment and consolidated shipping to lower CO_2 emissions. **Impact reporting dashboards** track and report environmental KPIs linked to orchestration decisions (distance saved, CO_2 avoided).

11

To conclude

Fashion's next competitive edge won't come from new silhouettes but from new systems. In a landscape shaped by microtrends, margin pressure, and rising consumer scrutiny, fulfilment is the performance layer where customer promises are kept, profits are protected, and loyalty is earned.

The brands that will lead the next decade are those who reframe fulfilment as strategy. Who turn operational intelligence into commercial agility. Who see DOM not as a central nervous system.

The blueprint is clear:

Unified stock enables the promise

Flexible orchestration delivers on it

Activated stores scale it fast and locally

Promise accuracy earns customer trust

Composable tech ensures you evolve

This is more than a whitepaper. It's a wake-up call. The operational bar has been raised. Fulfilment is now the battleground where brands win or lose.

Let's build a future where every promise is kept. Where fulfilment drives growth. And where operations are truly efficient.

OneStock

For questions and information

✉ contact@onestock-retail.com

🌐 onestock-retail.com