THE EXECUTION ADVANTAGE

HOW AI, AUTOMATION, AND MODERN WMS PLATFORMS ARE SHAPING THE NEXT COMPETITIVE ADVANTAGE FOR 3PLS

Executive Brief: August 2026

Insights from Original Research with 100+ 3PL Leaders

Executive Summary

Artificial intelligence, warehouse automation, and modern warehouse technologies are becoming central to the future of logistics. But beyond the headlines, 3PLs are focused on a more practical question: How can these technologies improve operations and create measurable business value?

To answer that question, Datex and Elastic Solutions partnered on The **3PL AI & Automation Playbook Survey**, gathering insights from over 100 3PL logistics, supply chain, and warehousing professionals across the industry.

Research Methodology

- 100+ 3PL Leaders Surveyed
- North America Focused
- Survey Conducted by Elastic Solutions | 2026.

The findings reveal an industry entering a new stage of maturity—moving beyond early technology adoption and into a new phase focused on operational performance and business value. More than half of respondents already operate with advanced warehouse technologies, operational performance—not labor reduction—is driving investment, and most organizations are already seeing measurable throughput improvements. At the same time, ROI and system integration remain the biggest obstacles to broader adoption.

AI, automation, and modern warehouse technologies are becoming increasingly common across 3PL operations. Customers expect it more and more, many providers already have it, and measurable operational improvements are becoming the norm. Competitive differentiation is shifting from technology adoption to operational execution. The organizations that succeed in the next phase will be those that make better use of AI, automation, & modern WMS platforms to continuously improve operational performance, deliver measurable business outcomes, and meet evolving customer expectations.

“The conversation has shifted from '**Should we automate?**' to '**How do we maximize the return on automation?**'”

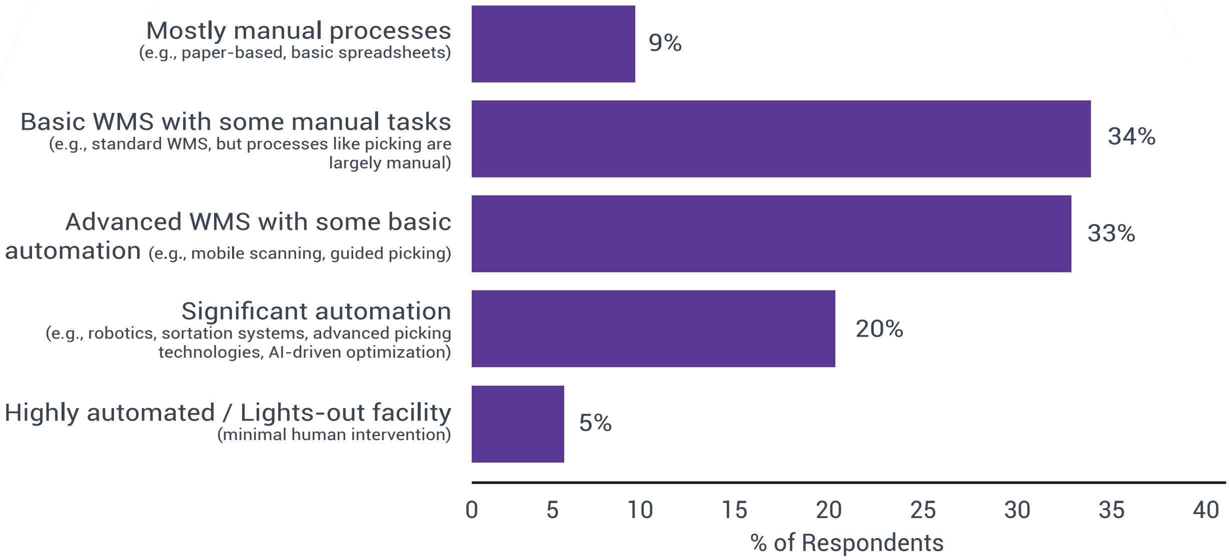
AI and Automation Are Moving Beyond Early Adoption

That's an important milestone for the industry. AI and automation are no longer emerging technologies for many 3PLs—they're becoming part of day-to-day warehouse operations.

As automation adoption continues to grow, competitive advantage will come less from investing in new technology and more from using existing technology to improve productivity, visibility, and customer service. The conversation is shifting from implementation to execution.

58% of respondents already operate with an advanced WMS, significant automation, or a highly automated facility.

Current Level of Automation in Primary 3PL Warehouse Operations



"The next competitive advantage won't come from deploying more technology. It will come from using it more effectively."

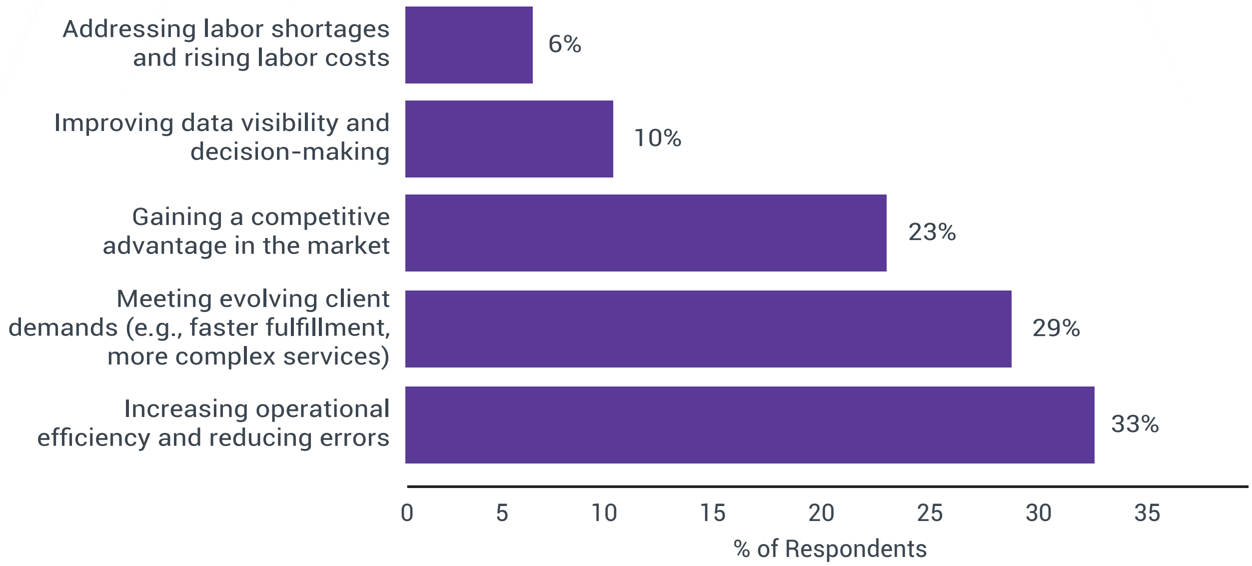
Operational Performance Is Driving Investment

Perhaps the biggest surprise in the survey is what didn't finish first. Only 6% cited labor shortages as their primary driver. Instead, respondents are investing because they want to improve warehouse performance, better serve customers, and stay ahead of the competition.

That shift reflects a transition to a more mature market where technology investments are increasingly evaluated by the business outcomes they deliver—not simply the technology itself.

84% of respondents identified operational efficiency, client demands, or competitive advantage as the primary reason they're investing in AI and automation.

Primary Driver for AI and Automation Investment



Percentages may not total 100% due to rounding, and combined figures may vary slightly from the sum of displayed values.

"3PLs are not automating simply to reduce labor. They are automating to perform better for customers."

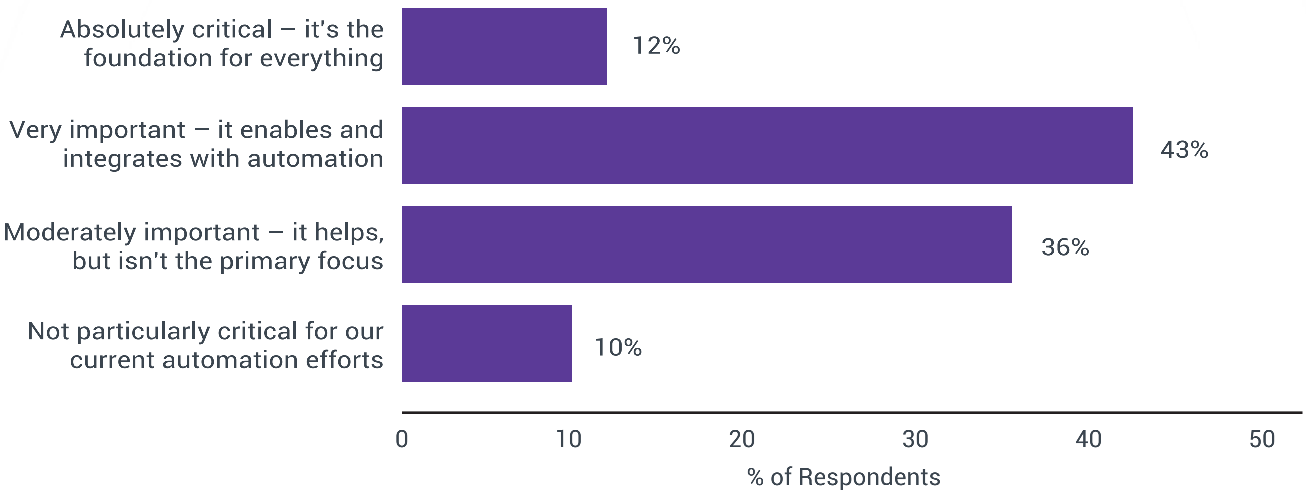
A Modern WMS Platform Is the Foundation for Intelligent Operations

The survey reinforces something many warehouse leaders already know: AI is only as effective as the operational foundation supporting it. A modern WMS connects inventory, labor, automation, and workflows, creating the visibility needed for intelligent decision-making.

As automation initiatives expand, organizations with integrated systems will be better positioned to scale new technologies and adapt to changing customer expectations.

54% say a modern WMS is absolutely critical or very important to their AI and automation strategy.

Importance of a Modern WMS to AI and Automation Strategy



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"A modern WMS provides the foundation that allows AI and automation to deliver measurable value."

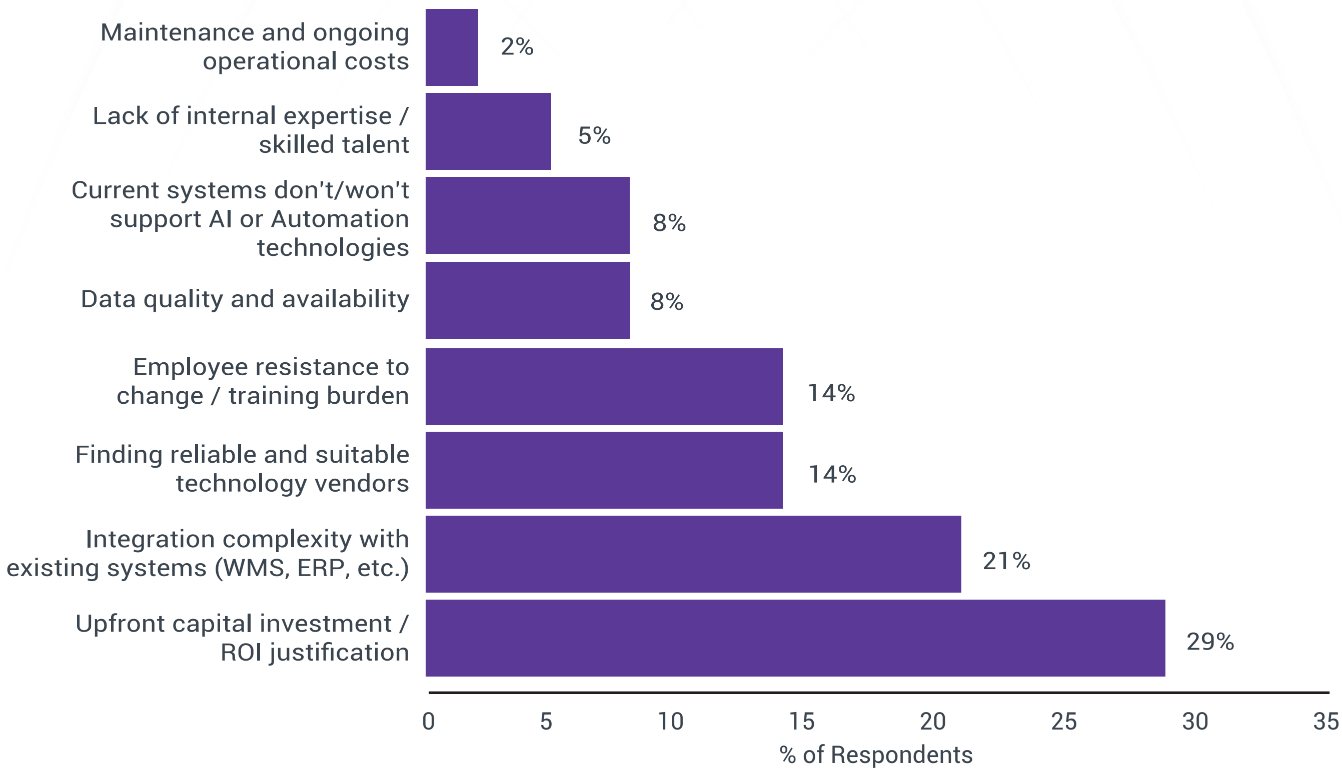
ROI and Integration Define the Implementation Challenge

The technology itself isn't the biggest hurdle anymore. Proving the investment and integrating it into existing operations are. As AI adoption accelerates, organizations are placing greater emphasis on measurable business outcomes and seamless implementation.

Technology providers that can simplify integration and demonstrate clear returns will be best positioned to earn trust—and investment.

50% of respondents identified ROI justification or system integration as their biggest implementation challenge.

Biggest Challenge to Implementing AI and Automation



"Technology investments are increasingly evaluated by the business outcomes they deliver."

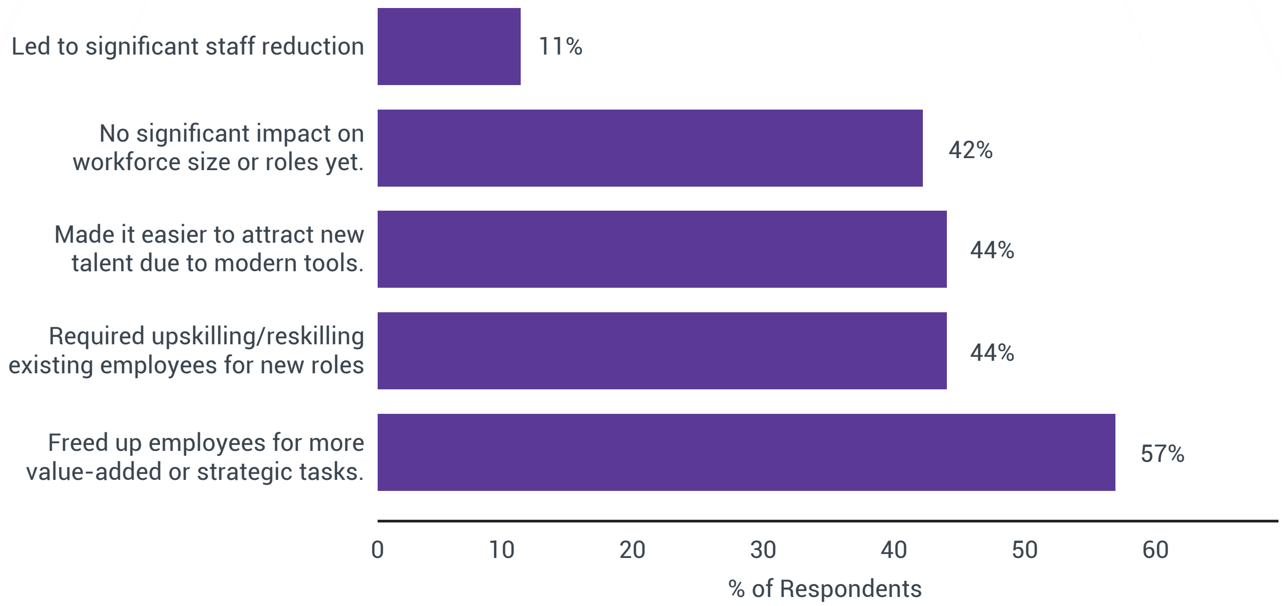
Automation Is Reshaping the Workforce - Not Replacing It

The findings challenge one of the biggest misconceptions surrounding warehouse automation. Rather than replacing employees, most organizations are using technology to improve productivity, develop new skills, and enable workers to take on more strategic responsibilities.

The most successful automation initiatives will pair technology investments with workforce development, ensuring employees are equipped to thrive in increasingly technology-enabled operations.

57% say automation has allowed employees to focus on higher-value work, while only 11% report significant workforce reductions.

Impact of AI and Automation on the Warehouse Workforce



Respondents could select more than one answer.

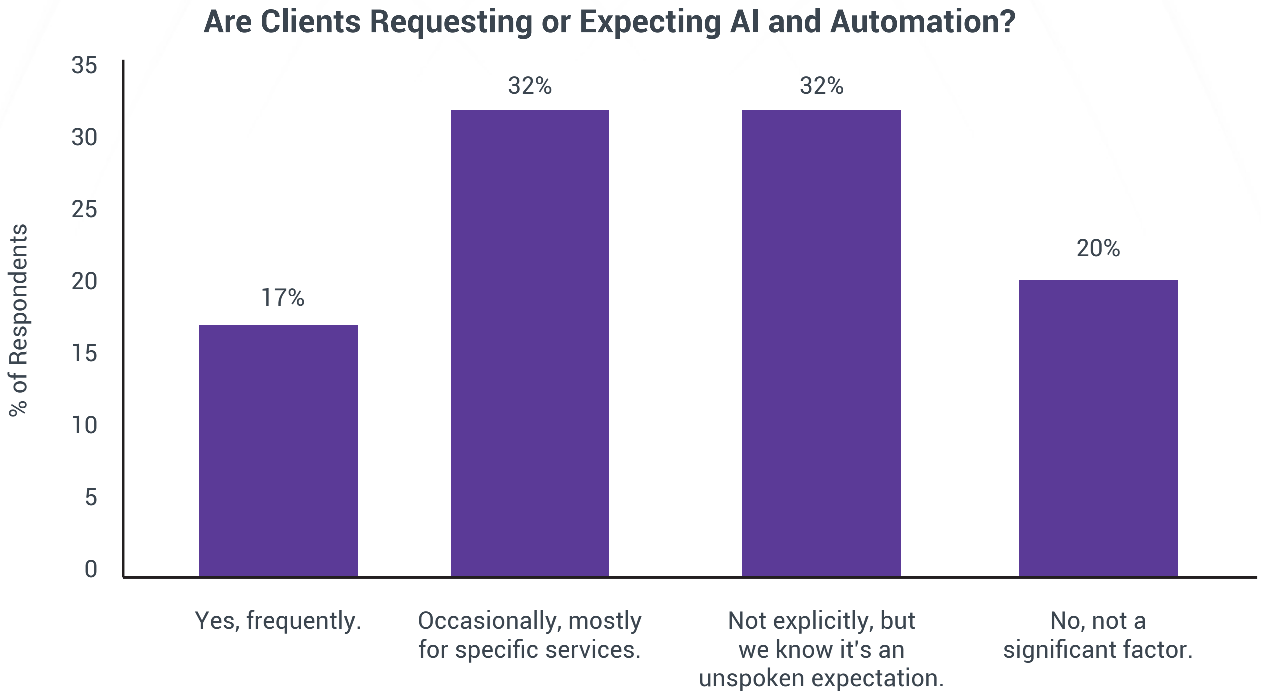
"The most successful automation strategies invest in people as much as technology."

Client Expectations Are Quietly Accelerating Change

Customers may not always ask specifically about AI or warehouse automation, but they consistently expect the outcomes these technologies deliver: faster fulfillment, better visibility, greater accuracy, and more responsive service.

For many 3PLs, automation is becoming part of the customer experience—and an increasingly important factor in winning and retaining business.

80% say customers expect—or increasingly assume—AI and automation capabilities from their 3PL partners.



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"Customers may not ask for AI or automation. They increasingly expect the outcomes it delivers."

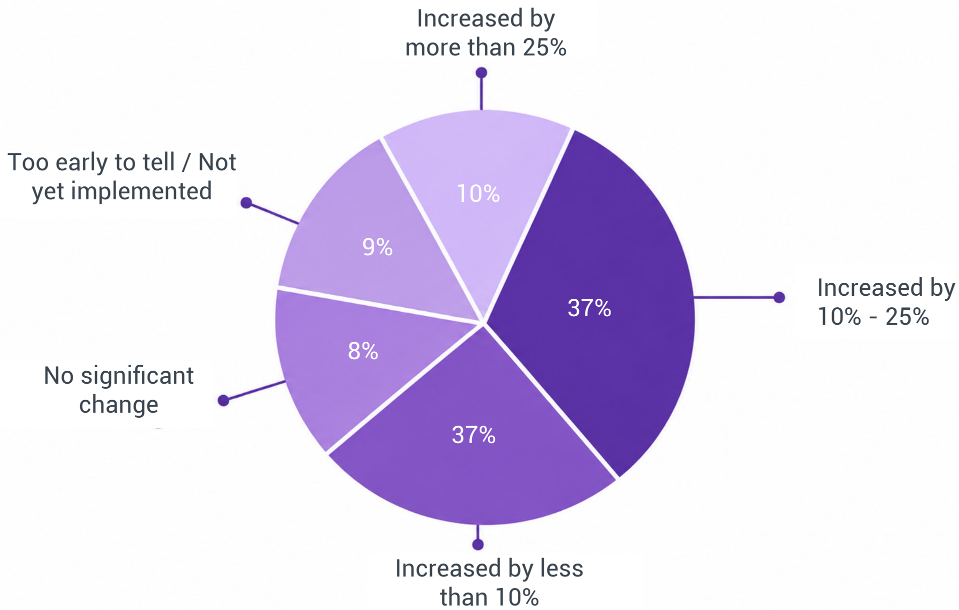
Automation Is Producing Measurable Throughput Gains

For most respondents, automation is no longer a future initiative—it's delivering measurable operational improvements today. Nearly half report throughput gains of 10% or more, reinforcing the growing business case for continued investment.

The next opportunity is translating those operational gains into broader business metrics, including customer satisfaction, profitability, and long-term growth.

83% report that automation and advanced WMS capabilities have increased warehouse throughput.

Impact of Automation on Warehouse Throughput



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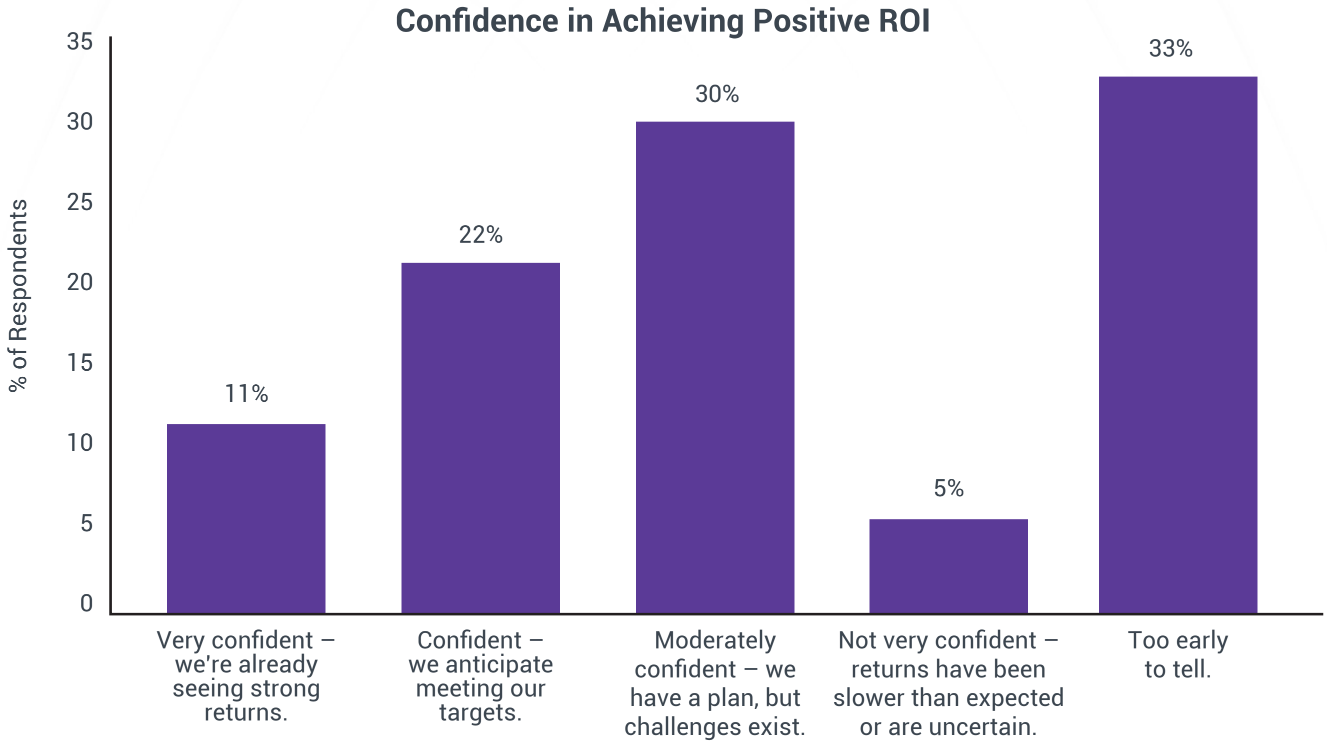
"For most 3PLs, automation is no longer a future promise. It is already producing measurable results today."

Positive ROI Is Expected - But Confidence Is Still Developing

While organizations remain optimistic about the long-term value of AI and automation, many are still working to build confidence around implementation timelines and measurable returns.

Establishing clear performance metrics before deployment will help organizations validate success, strengthen future business cases, and maximize the value of their technology investments.

Only 33% are confident or very confident they will achieve positive ROI within their projected implementation timeline.



"The challenge is no longer adopting AI and automation. It's turning technology into measurable business value."

Key Takeaways for 3PL Leaders

The survey points to an industry that's moving beyond technology adoption and into operational execution. The leaders in the next phase won't simply invest in more automation—they'll use it to deliver measurable improvements for both their operations and their customers.

What leading 3PLs should focus on next:

- **Start with the business outcome.** Define the operational challenge you're solving, and the business results you want to achieve before selecting the technology.
- **Strengthen your WMS foundation**. Connected systems and accurate data are essential for scaling AI and automation.
- **Measure ROI from day one.** Establish performance baselines and track business outcomes throughout implementation. Measure operational outcomes, not just technology implementation.
- **Prioritize integration and flexibility.** Choose technologies that fit naturally into your existing environment and support long-term scalability.
- **Invest in your people.** Technology adoption is most successful when paired with training, change management, and workforce development.
- **Connect automation to customer value.** Faster fulfillment, greater visibility, and improved service are the outcomes customers ultimately care about and increasingly expect from their 3PL partners.

"The next generation of 3PL leaders won't be defined by the technology they deploy—but by how effectively they use it to create measurable business value."

About Datex

Datex helps third-party logistics providers simplify the complexity of multi-client warehouse operations.

Footprint® WMS combines real-time inventory visibility, client-specific workflows, advanced billing, and low-code configurability to help 3PLs operate more efficiently and adapt faster. Complemented by Footprint Analytics and Datex Studio, the platform delivers trusted insights, streamlined operations, and seamless integration. The result is greater agility, stronger customer service, and a foundation for scalable growth.

For more information, please visit https://datexcorp.com/.

About Elastic Solutions

Elastic Solutions is a leader in targeted marketing, research, and demand generation services for the B2B high-tech community. They were responsible for generating and analyzing the data presented in this executive brief.

For more information, please visit www.elasticroi.com.