



The Industrial B2B Replatforming Playbook

*A Decision Framework for Mid-Market Industrial
Companies*

Evaluating Shopify, Adobe Commerce, BigCommerce, and Custom Platforms

Introduction

Industrial B2B ecommerce is undergoing a generational platform shift, driven by a collision of rising buyer expectations, unsustainable legacy costs, and the rapid maturation of cloud-native commerce platforms. Shopify has emerged as a credible contender for mid-market industrial companies—earning Leader status in both the 2025 Gartner Magic Quadrant and 2024 Forrester Wave for B2B Commerce^[8, 9]—but the honest picture is more nuanced than any vendor will tell you.

This playbook compiles the factual foundation for an informed replatforming decision: real capabilities, real gaps, real costs, and real results from companies that have already made the move. It is written for VP-level and Director-level decision-makers at industrial companies doing \$30M–\$500M in annual revenue who may not yet realize their current platform is holding them back.

The \$32 Trillion Market Nobody’s Platform Can Fully Serve

The global B2B ecommerce market reached \$28.2 trillion in 2024 and hit a new high of \$32.1 trillion in 2025, growing at a 14.5% CAGR through 2030.^[1] Manufacturing alone commands 24% of B2B ecommerce market share, making it the single largest industry segment.^[2] In the U.S., B2B ecommerce accounts for 86.6% of all ecommerce activity—\$9.69 trillion in 2024.^[3]

Yet only 14% of enterprises report satisfaction with their current ecommerce platform.^[4] The disconnect is driving a massive replatforming wave: 78% of B2B sellers plan to switch commerce platforms, and B2B ecommerce migration spending is projected to hit \$4.2 billion in 2025 alone.^[5, 6] Among those who have recently migrated, 98% report satisfaction with their new platform.^[7]

The 2025 Gartner Magic Quadrant for Digital Commerce assessed 19 vendors, naming five Leaders: commercetools, SAP Commerce Cloud, Salesforce Commerce Cloud, Shopify (newly elevated from Challenger), and Adobe Commerce.^[8] The Forrester Wave for B2B Commerce (Q2 2024) names Salesforce and Optimizely as Leaders, with BigCommerce as a Strong Performer and Shopify earning Leader status in its first year of evaluation.^[9]

For mid-market industrial companies (\$30M–\$500M revenue), the platform decision is no longer about choosing between “enterprise-grade features” and “modern architecture.” The question is which platform delivers the right balance of capability, total cost, speed, and trajectory for your specific B2B complexity.

Industrial Buyers Have Already Changed

The most powerful force driving replatforming is the buyer on the other side of the screen. 71% of B2B buyers are now Millennials or Gen Z.^[10] These digital-native buyers bring fundamentally different expectations to industrial purchasing.

McKinsey's ninth B2B Pulse survey reveals that B2B buyers now use an average of 10.2 channels in their purchasing journey, double the 5 channels used in 2016. Ecommerce has dethroned in-person sales as the top revenue generator for the second consecutive year, accounting for 34% of B2B revenue. ^[11, 12]

The self-service data is striking: 39% of B2B buyers now spend over \$500,000 per order through self-service or remote channels, up from 28% just two years ago. 73% are comfortable placing \$50,000+ orders online. ^[13] Gartner reports that 61–75% of B2B buyers prefer a rep-free buying experience. ^[14]

Mobile is no longer optional: 80% of B2B buyers use mobile devices throughout their purchasing journey, and 53% have completed business purchases on mobile. ^[15] Meanwhile, 89% of B2B buyers now use generative AI for self-guided research, according to Forrester's 2026 Buyers' Journey Survey. ^[16]

The consequence: 67% of B2B buyers have already switched suppliers in search of a more consumer-like experience, and 74% say they would switch for a better online experience. ^[17]

Shopify's B2B Arsenal: Strengths and Gaps

Shopify Plus now offers 42+ built-in B2B features integrated directly into the admin panel, a dramatic expansion from what was essentially an afterthought three years ago. ^[18] The platform's most robust B2B capabilities require Shopify Plus (\$2,500/month) and include company accounts with up to 10,000 ship-to locations per company, customer-specific price lists, quantity price breaks, native net payment terms (Net 15/30/60/90), catalogs controlling product visibility per company, and draft orders for sales-rep-assisted ordering.

The Summer 2024 "Unified" Edition marked a turning point, reimagining Markets as a centralized hub for B2B, retail, and international expansion from a single admin. ^[19] The 2025 variant limit increase to 2,048 per product (up from 100) addressed one of the most persistent enterprise complaints. ^[20]

Where Shopify Excels

Shopify's strongest positioning for industrial B2B is the unified B2B + DTC architecture—running both channels from a single admin with shared inventory, products, and fulfillment. The headless commerce story is equally strong: Hydrogen (React-based framework), Oxygen (global edge hosting with 285+ points of presence), and the zero-rate-limit Storefront API provide a mature composable architecture. ^[21] B2B on Hydrogen has been officially supported since May 2024. ^[22]

Independent analyses consistently show 40–70% lower TCO versus Adobe Commerce over three to five years. ^[26] B2B stores launch in 30–90 days versus 9–18 months on legacy platforms. Shopify's checkout converts 12–17% higher than competing platforms. ^[27] The platform delivers 99.99% uptime with auto-scaling infrastructure and zero hosting management. ^[28]

Where Shopify Has Gaps

Integration capabilities rely entirely on the partner ecosystem. Shopify has no native first-party ERP connectors (except a basic NetSuite sync app). All ERP integrations—NetSuite via Celigo, SAP via TrueCommerce, Microsoft Dynamics via i95Dev—require third-party middleware.^[23] EDI comes exclusively through partners like SPS Commerce.^[24] Punchout catalog support (cXML/OCI) requires TradeCentric or similar connectors.^[25]

The product configuration gap is the most critical limitation for industrial manufacturers. Shopify's variant system—even with the 2,048 expansion—lacks conditional logic, nested dependencies, and exclusion rules.^[61] Approval workflow limitations constrain procurement-heavy organizations: only two native buyer roles exist, with no support for multi-tier approval chains.^[62]

Third-party app dependency is a legitimate structural concern. Nearly every complex B2B capability—EDI, punchout, LTL freight quoting, credit management, PIM—requires layering additional applications, with total app costs for a fully-featured industrial B2B setup reaching \$1,500–\$5,000+/month on top of the platform fee.^[63] API rate limits can become bottlenecks during heavy integration scenarios.^[64]

Platform lock-in concerns are real: transaction data through Shopify Payments is classified as confidential and cannot be exported, and using alternative payment processors incurs a 0.20% surcharge.^[65]

The honest trajectory assessment: Shopify is closing the B2B gap faster than any competitor, with 150+ updates per Edition cycle and B2B as a stated strategic priority.^[66] But enterprise-grade industrial B2B features—deep CPQ, multi-tier approvals, native EDI, blanket POs—are not on any publicly visible near-term roadmap.

Adobe Commerce: Deeper Features, Higher Costs

Adobe Commerce (Magento) remains the platform with the deepest native B2B feature set in the market: full organizational hierarchies, shared catalogs with granular pricing rules, requisition lists, CSV-upload quick ordering, negotiable quotes, purchase order approval workflows, and built-in company credit management.^[29] Adobe earned Leader status in the Gartner Magic Quadrant for Digital Commerce for the ninth consecutive year in 2025.^[30]

The Total Cost Reality

Adobe Commerce license fees alone range from \$22,000–\$40,000/year at entry level to \$125,000–\$190,000+/year for businesses with \$25M+ in annual sales.^[31] Implementation costs run \$50,000–\$500,000+ depending on complexity, with enterprise B2B builds frequently exceeding \$500,000.^[32] Multiple independent analyses place Adobe Commerce's TCO at 3x to 5x higher than Shopify Plus.^[33]

Senior U.S.-based Magento developers command \$100–\$180/hour (versus \$75–\$150 for Shopify), and the certified talent pool is widely acknowledged as shrinking.^[34]

Security Concerns

The CosmicSting vulnerability (CVE-2024-34102, CVSS 9.8) disclosed in June 2024 resulted in 5% of all Adobe Commerce and Magento stores being hacked, including brands like Ray Ban, National Geographic, and Cisco.^[35] The SessionReaper vulnerability (CVE-2025-54236, CVSS 9.1) in September 2025 enabled unauthenticated remote code execution; six weeks after disclosure, only 38% of stores had patched.^[36]

Multiple agencies and analysts note that Adobe Commerce's B2B product has seen limited innovation recently, and features on its roadmap are predominantly features that Shopify already offers.^[37] The forced upgrade deadline—versions 2.4.4 through 2.4.6 lose support in 2026—is creating another wave of replatforming decisions.^[38]

Documented Migrations from Adobe Commerce to Shopify

MR DIY achieved a 113% increase in daily order fulfillment and 41% reduction in platform costs after moving to Shopify. The Conran Shop cut TCO in half.^[39] Across documented migrations, average conversion rate increases of 10–30% within 90 days are typical, with mobile conversion improvements of 40–50%.^[40]

BigCommerce B2B Edition: The Middle Path

BigCommerce B2B Edition currently offers more native B2B features out-of-the-box than Shopify, including company account hierarchies with six distinct buyer/seller roles, Configure-Price-Quote (CPQ) functionality launched March 2025, native purchase order workflows, an invoice portal, and sales rep masquerade capabilities.^[41]

BigCommerce earned 24 out of 24 medals in the 2025 Paradigm B2B Combine for the third consecutive year.^[42] An IDC-commissioned study found BigCommerce B2B merchants achieved 391% three-year ROI with a seven-month payback period.^[43] The zero transaction fee model is a significant differentiator for high-volume B2B.^[44]

Where BigCommerce falls short versus Shopify: the app ecosystem is roughly one-eleventh the size (approximately 1,200 apps versus 13,000+), R&D investment is orders of magnitude smaller, and revenue growth has decelerated to approximately 3% in 2025.^[45] BigCommerce's total 2024 revenue of \$332.9 million and approximately 60,000 merchants contrast with Shopify's multi-billion-dollar revenue and 5+ million active stores.^[46]

Notable industrial companies on BigCommerce B2B include MKM Building Supplies (UK's largest independent builder's merchant, achieving 82% revenue uptick and 75% page load improvement after headless migration), Remington Industries, and GlassCraft Door Company.^[47]

Custom-Built Platforms: The Hidden Cost of Total Control

An unknown but significant percentage of industrial B2B companies still operate on custom-built ecommerce platforms. The appeal is real: full code ownership, accommodation of unique workflows, deeply coupled ERP integration, and no vendor dependencies.

The hidden costs are devastating. Accenture's 2025 Digital Core report estimates technical debt costs \$2.41 trillion annually in the U.S. alone. Stripe's Developer Coefficient study found developers spend 33% of their time (13.4 hours/week) addressing technical debt rather than building new capabilities. ^[48]

Annual maintenance costs for custom industrial ecommerce platforms range from \$200,000–\$500,000 for mid-market implementations to \$500,000–\$2 million+ for enterprise-grade systems. ^[49] Organizations with below-average technical debt demonstrate 5.3% revenue growth versus 4.4% for peers, and companies with proactive debt management achieve 60% faster time-to-market for new features. ^[50]

Ten Signals It's Time to Replatform

Research across commercetools, McKinsey, Forrester, and Digital Commerce 360 converges on consistent replatforming triggers. The commercetools 2025 Migration Report found that 79% cite improved scalability and user experience as top considerations, 78% prioritize speed of innovation, and 76% identify data security as the biggest migration challenge. Post-migration, 96% report faster time to value, 67% report faster website performance, and 63% report revenue increases. ^[51]

1. TCO exceeds 3% of digital revenue and rising, with unpredictable maintenance costs consuming budget that should fund growth.
2. Developer dependency for routine changes—adding products, updating prices, or modifying content requires submitting development tickets.
3. Integration bottlenecks where ERP, CRM, and PIM systems operate as data silos requiring manual reconciliation.
4. Mobile experience is an afterthought, despite 80% of buyers using mobile in their purchasing journey.
5. Self-service gaps where buyers cannot check inventory, view account-specific pricing, reorder, or track shipments without calling a sales rep.
6. Security vulnerabilities on unpatched or unsupported platform versions, creating compliance and breach risk.
7. End-of-life deadlines approaching (Adobe Commerce 2.4.4–2.4.6 support ending in 2026; Magento 1.x long past EOL).
8. B2B + DTC convergence needed but architecturally impossible on current platform.
9. Competitive pressure from peers and marketplaces delivering superior digital experiences.
10. Innovation velocity has stalled—new features take months instead of weeks.

Modern SaaS platform migrations typically complete in 8–16 weeks for mid-complexity implementations, while legacy-to-legacy migrations run 12–18 months. ^[52]

Proof Points: Carrier and Russell Hendrix

Carrier Global Corporation

Carrier (\$20B+ revenue, 180 countries) represents Shopify's most compelling industrial B2B case study. The company built "OneCommerce," a central Shopify accelerator covering approximately 80% of shared business requirements, replacing a legacy monolithic platform where launching a new ecommerce site took 9–12 months and cost up to \$2 million per site. ^[53]

On Shopify, Carrier now launches ecommerce sites in 30 days at \$100,000 per site—a 90% time reduction and 95% cost reduction. Order fulfillment cycle time decreased from 14 days to 3 days in B2B channels, sales increased 40% year-over-year, and the company launched six stores in six months. ^[54]

Russell Hendrix

Russell Hendrix, Canada's largest foodservice equipment supplier (80+ years, 10,000+ products, 300+ customer groups), operated on a heavily customized legacy platform where every feature change required custom development. Their sales team had abandoned the platform entirely, entering orders directly into ERP. ^[55]

Within 12 months of launching Shopify B2B, Russell Hendrix achieved a 24% increase in revenue, 43% increase in B2B online order volume, 5x faster order processing for sales reps, and a 9% increase in average order values—managing 300+ customer groups with unique pricing, terms, and product availability. ^[55]

Additional Industrial Proof Points

Kooks Headers & Exhaust (automotive parts, 22% conversion rate increase, 38% lower TCO), Filtrous (laboratory equipment, launched in 63 days, 27% increase in organic B2B conversion), Snyder Performance Engineering (automotive aftermarket, 25% reduction in back-office time, 40% increase in customer spending), and Industry West (from Adobe Commerce, 90% increase in B2B web revenue). ^[56]

The Honest Cost Picture

Total cost of ownership comparisons require careful interpretation because vendor-commissioned research dominates available data. Shopify's own commissioned study states Adobe Commerce has 42% higher implementation costs and 24% higher operating costs. Independent agency Qualimero estimates Adobe Commerce causes 3x to 5x higher TCO through maintenance, hosting, and technical debt. ^[57]

Cost Category	Shopify Plus	Adobe Commerce	BigCommerce Ent.	Custom-Built
Platform fees/yr	\$28K–\$30K	\$22K–\$190K+	Custom + B2B add-on	\$0 (software)
Implementation	\$40K–\$150K+	\$150K–\$500K+	\$50K–\$200K+	\$200K–\$1M+
Hosting	Included	\$1.2K–\$12K+/yr	Included	\$12K–\$100K+/yr
Dev rates (US Sr.)	\$120–\$200/hr	\$120–\$275/hr	\$110–\$200/hr	Varies
Annual maintenance	\$20K–\$80K	\$50K–\$150K+	\$30K–\$100K	\$200K–\$500K+
Transaction fees	0.15–0.25%	None	None	None
Est. 3-yr TCO (mid-mkt)	\$150K–\$450K	\$400K–\$1.2M+	\$200K–\$600K	\$800K–\$2.5M+

Note: These ranges are directional estimates aggregated from multiple sources. Shopify’s transaction fee structure deserves scrutiny at scale: for a B2B company doing \$5M annually online, total Shopify costs can exceed \$200,000/year when factoring all fees, apps, integrations, and development.^[58]

Performance benchmarks favor Shopify: 93% of Shopify stores pass Google Core Web Vitals as “fast,” compared to 80% for BigCommerce, 53% for Adobe Commerce, and 34% for WooCommerce.^[59] Shopify powers 5.17 million websites with 13,000+ apps and 780+ approved agencies, creating a massive talent pool versus Adobe Commerce’s shrinking developer base.^[60] It is worth mentioning that apps in Shopify’s ecosystem are largely created by non-Shopify developers and are found to have varying levels of quality.

Conclusion: The Replatforming Calculus

Shopify is the strongest choice for industrial companies that operate hybrid B2B + DTC models, prioritize speed-to-market and lower infrastructure burden over maximum native B2B feature depth, have straightforward-to-moderate B2B complexity, and are willing to invest in integration partners and apps to bridge capability gaps.

Adobe Commerce remains more capable, but is arguably only a fit for organizations with deeply complex B2B requirements—heavy RFQ workflows, multi-tier approval chains, advanced credit management—where those features are operational necessities. But companies must price in the full cost implications (3–5x Shopify’s TCO), the shrinking developer talent pool, and uncertain innovation pace.

BigCommerce deserves consideration as a middle path currently offering more native B2B features than Shopify with zero transaction fees, particularly for B2B-first businesses where the DTC ecosystem matters less. It should be noted that BigCommerce has been steadily losing merchants since its 2019 peak, with active store counts declining roughly 6% year-over-year and a net loss of ~3 merchants per day to competitors as of early 2026. The migration flow is accelerating, particularly at the enterprise level, driven by revenue-based pricing, mounting

technical debt, and growing concerns about BigCommerce's platform health following a 30% workforce reduction in 2024.^[67]

Custom platforms should be retired in nearly all cases. The maintenance cost, technical debt burden, security risk, and opportunity cost cannot be justified when SaaS platforms now cover 80–95% of industrial B2B requirements at a fraction of the total cost.

The most important data point may be the simplest: 98% of companies that recently migrated platforms are satisfied with their decision.^[7] For the 86% dissatisfied with their current platform, the risk of changing is now measurably lower than the cost of standing still.

How an Implementation Partner Bridges the Gap

Shopify is best understood as an 80% solution that requires significant app layering, custom development, and ERP middleware to reach the 95% mark. The partner's role in complex industrial implementations is to architect the integration layer—connecting Shopify to ERP systems, building custom B2B workflows via Shopify Functions and checkout extensions, configuring third-party apps for EDI/punchout/freight, and managing the data migration that determines whether the project succeeds or fails.

Classy Llama, founded in 2007, positions as “The Replatform Agency for Mid-Market Ecommerce,” serving manufacturers, distributors, and complex retail across Shopify, Adobe Commerce, and BigCommerce. B2B/industrial ecommerce work includes Transcat, C&B Equipment, All State Ag Parts, and Prosoco.^[68]

For mid-market industrial companies without deep internal technical teams, this expertise translates Shopify's 80% native capability into a 95%+ working solution tailored to specific operational requirements.

If you have questions about this publication, please contact Greg Tull, Director of Marketing & Partnerships at Classy Llama. greg.tull@classyllama.com

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