

Magic Quadrant for Supply Chain Planning Solutions

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Supply chain planning technology is required to provide responsiveness, agility and flexibility in support of a company's strategic goals. This Magic Quadrant will help supply chain technology leaders evaluate and select the most suitable software vendors to develop their SCP technologies.

Market Definition/Description

Gartner defines supply chain planning (SCP) solutions as platforms that provide technological support to enable a company to manage, link, align, collaborate and share its planning data across an extended supply chain. An SCP solution supports planning, ranging from demand planning through detailed supply-side response planning, and from strategic planning to execution-level planning. It is the planning decision repository for a defined end-to-end supply chain. It is also the environment in which end-to-end-integrated supply chain decisions are managed. It establishes a single version of the truth for planning data and decisions, regardless of the underlying execution technology environment.

Organizations use SCP solutions to improve their supply chain planning decisions and reach higher levels of maturity. These solutions enable and streamline planning decision making by providing access to planning data, application of logic, such as business rules, and priorities and process governance capabilities. If utilized optimally, this results in improved end-to-end supply chain planning processes, including aligning strategic priorities with resource allocations to drive improved business outcomes.

The common use-case scenarios or business problems SCP solutions are intended to address include:

- **Aligning plans end to end** — This involves creating plans that are aligned and feasible across all the different tiers in our supply chains, from suppliers to customers and further tiers out. It is also focused on creating plans that are connected across the different planning layers, from strategic-level planning to execution-level planning.
- **Improving visibility** — This involves providing insights into the status of the supply chain as well as key metrics used for decision making. By having information readily available, organizations are better equipped to assess and provide actionable insights based on data. Users can identify areas where improvements can be made to increase efficiency and drive value creation for the organization.
- **Fostering decision-making speed and quality** — This involves meeting the need for faster and higher-quality decision making for the supply chain operations. By having strong technology support, automation of processes and decisions can be enabled, resulting in higher efficiency and less human-biased decision making. Collaboration capabilities allow planners to collaborate directly in the platforms, resulting in greater confidence in the inputs and outputs used to make decisions.

Mandatory Features

- Demand planning, such as demand forecasting and consensus demand planning.
- Supply planning, such as inventory planning, replenishment planning, order promising, production planning and production scheduling.
- Support for the alignment of planning decisions across the enterprise and multiple planning decision layers.
- Support for financial impact analysis and planning.

Common Features

The common features for this market include:

- Advanced analytics and AI
- Digital supply chain twin
- Supply chain design, modeling and segmentation
- Continuous planning

- Multienterprise planning

Magic Quadrant

Figure 1: Magic Quadrant for Supply Chain Planning Solutions



Gartner

Vendor Strengths and Cautions

Anaplan

Anaplan is a Challenger in this Magic Quadrant. Its cloud-native Connected Planning Platform supports demand and supply planning, sales and operations planning (S&OP), and procurement planning. It also aligns operational and financial planning to enable extended planning and analysis (xP&A). Its operations are primarily focused in North America, Western Europe and the Asia/Pacific (APAC) region. Its clients are typically midsize to large organizations from a variety of industries. Anaplan's goals for future investments prioritize integrating advanced analytics, artificial intelligence (AI) and machine learning (ML) tools, as well as greater human-machine collaboration into its supply chain planning (SCP) offering.

Strengths

- **Platform extensibility:** Anaplan has one of the most extensible solutions on the market, due to its open architecture, API strategy and no-code/low-code configuration capabilities within one platform. Anaplan continues to expand its offerings with prepackaged functional applications that include access to integrated AI/ML analytics, Anaplan CoPlanner and optimization frameworks.
- **Industry coverage:** Anaplan provides broad coverage across process manufacturing, discrete manufacturing and distribution-intensive verticals (e.g., retail and wholesale/distribution). This makes it an attractive, relevant partner for new and existing customers that grow into a mix of verticals.
- **Financial impact analysis:** Anaplan excels in financial planning, and these capabilities translate into a top strength for financial impact analysis, which is critical for planning processes, such as integrated business planning (IBP). Several customers make use of Anaplan for both xP&A and SCP.

Cautions

- **Decision Automation:** Anaplan's vision for decision automation in SCP is more limited than other vendors in this Magic Quadrant. It uses workflow, and exception-based planning, coupled with new functionality from Data Orchestrator, to support the foundations for automation. However, it is limited in AI-based autonomous planning.
- **Range of analytics:** Anaplan's vision for analytics covers heuristics and optimization and provides access to supervised ML. Although Anaplan continues to evolve its analytics roadmap, it lacks stronger visions for leveraging simulations (such as discrete-event simulation or Monte Carlo simulation), and it offers a more limited range of ML techniques.

- **Deployment options:** Anaplan's solution can only be deployed on Anaplan's own cloud, the Amazon Web Service (AWS) Cloud or the Google Cloud Platform (GCP), giving customers less choice for deployment methods. This may deter organizations that prefer to use other hyperscale clouds or require an on-premises solution.

Arkieva

Arkieva is a Challenger in this Magic Quadrant. Its Arkieva Enterprise platform delivers a wide range of planning capabilities, from S&OP to detailed scheduling. Its operations are geographically diverse, but are mainly focused in North America, Western Europe and the APAC region (excluding Japan). Its clients are typically midsize-to-large organizations in process manufacturing, with a focus on chemical manufacturing, food and beverage, and consumer products. Arkieva is investing in expanding its platform's capacity for ML and automation to improve customer planning agility and decision making.

Strengths

- **Capability breadth:** Arkieva has a strong vision for supporting a wide range of planning decisions across the strategic, tactical and operational planning layers. This includes capabilities ranging from network modeling, S&OP and order promising to detailed scheduling. It also includes strong linking to execution environments, such as manufacturing execution systems (MESs), warehouse management systems (WMSs) and transportation management systems (TMSs).
- **Decision automation:** With a vision to support the automation of independent planning capabilities, such as demand planning and scenario planning, through a broad set of techniques, Arkieva's vision for planning decision automation is comparatively strong. This enables customers to execute a roadmap of automation that allows planners to focus on where they add the most value.
- **Pricing:** The cost of Arkieva's solution is competitive, compared with peer vendors in this Magic Quadrant, making it an attractive option, especially for midmarket customers. In addition, its pricing model's simplicity makes it easy for customers to understand the financial implications of scaling the solution up or down.

Cautions

- **User experience:** Arkieva's vision for improving the user experience (UX) focuses on areas such as key performance indicators (KPIs), reports and visualization features. However,

the vision for using natural-language technologies and generative AI (GenAI) to enhance the UX is narrow. This can challenge strong end-user adoption, especially when combined with Arkieva's limited vision for adoption metrics in the solution.

- **Industry strategy:** Arkieva has a strong focus and footprint in process manufacturing industries, such as chemicals, food and beverage, and oil and gas, but less focus on discrete manufacturing and distribution-intensive industries. This can prove challenging for companies with a diverse product portfolio that requires considerable functional coverage in several sectors.
- **Third-party implementation services:** Arkieva has fewer third-party implementation partners than other vendors in this Magic Quadrant. This affects customers' choice of partners to support them on their implementation and transformation journeys.

Blue Yonder

Blue Yonder is a Leader in this Magic Quadrant. Its Cognitive Planning platform provides a broad set of capabilities to enable end-to-end, multienterprise planning. Its operations are geographically diverse, but its main focus is on North America, Western Europe and the APAC region (excluding Japan), and its clients tend to be larger enterprises from a variety of industries. Blue Yonder's investments for the future lead to platform iterations that aim to bolster its scalability and advanced analytics capabilities in support of trends like hyperautomation. It acquired One Network Enterprises in August 2024 to further strengthen its ecosystem visibility for customers.

Strengths

- **Decision automation:** Blue Yonder's vision for decision automation leverages various techniques to automate planning decisions across demand and supply. It automates routine tasks through its process orchestration workflow and offers a strong vision for the use of GenAI to further enhance automation, supporting customers on their journey toward autonomous planning.
- **Geographic and industry strategy:** Blue Yonder is a global company with offices in all of the regions covered in this research and numerous distribution and reselling partners. Along with a broad industry coverage, this makes Blue Yonder attractive for a variety of organizations around the world and across industries.
- **Capability coverage:** Blue Yonder supports the different layers of planning through its broad and deep capability coverage. This ranges from network design, demand planning

and inventory optimization to order promising and detailed scheduling. Its acquisition of OneNetwork is aimed at extending its multienterprise planning capabilities.

Cautions

- **Strategy for upgrades:** Blue Yonder's strategy for solution upgrades is below average, compared with other vendors within this Magic Quadrant. It releases upgrades at a lower frequency comparatively, charges customers extra if they are using older versions of the software, and expects customer testing in relation to adopting new releases.
- **Customer experience:** Blue Yonder received below-average feedback in areas such as customer service and support, evaluation and contract negotiation, and its likelihood of being recommended to other clients. This has resulted in a below-average result for overall customer experience for Blue Yonder, compared with other vendors in this Magic Quadrant.
- **Pricing:** Blue Yonder has taken initiatives to simplify its pricing structure with a pricing model that charges per item location and per user; however, Gartner data shows that it remains complex and somewhat opaque. Its software's subscription price is also comparatively high.

Board International

Board International is a Niche Player in this Magic Quadrant. Its SCP solution (also called Board) is mainly centered around demand, inventory and replenishment planning. Its operations are mainly focused on Western Europe and North America, and it has clients of different sizes across industries such as footwear/apparel, industrial manufacturing, consumer products and retail. Board has its heritage in financial planning and analysis (FP&A), giving it a natural path into SCP through IBP/S&OP. It acquired Prevedere in November 2024 and is investing in and leveraging Prevedere's data and analytics (D&A) capabilities in the Board solution for SCP purposes.

Strengths

- **User experience:** Board has a solid vision for a unified, flexible and simple UX with collaboration capabilities and explainability of planning results with AI-assisted insights and recommendations. This includes GenAI, to enhance the UX, as well as elements for user adoption metrics.

- **Platform simplicity:** Board offers a simple platform with natively built capabilities. It offers several modules across areas such as demand planning and S&OP that use the same underlying platform, making it a simple and intuitive architecture for customers.
- **Strategy for upgrades:** Board's strategy for upgrades is above average, compared with other vendors in this Magic Quadrant. It releases new functionality on a quarterly basis and ensures full backward compatibility (although some user testing is required). Furthermore, customers can choose whether to upgrade to the newest release without cost implications, and it also supports releases several years back.

Cautions

- **Range of analytics:** Board's vision for the range of analytics in its platform is weaker, compared with other vendors in this Magic Quadrant. It includes statistics, heuristics and some Monte Carlo simulation. However, it's limited in terms of ML capabilities, because it leans heavily on capabilities offered in Microsoft Azure and the newly acquired company, Prevedere. The strategy also does not include broader simulation capabilities nor built-in optimization solvers, although it does support a bring-your-own-model strategy for the latter.
- **Geographic strategy:** Board has offices in only five of the eight regions defined in this Magic Quadrant: North America, Western Europe, the Middle East/North Africa and the APAC region (including Japan). Combined with a low number of distributors, value-added resellers (VARs) and implementation partners, this weakens Board's overall geographic strategy.
- **Deployment options:** Board offers fewer deployment options than its peers. Its solution can be deployed only as a single tenant in the Microsoft Azure Cloud and on-premises, which may deter organizations that prefer to use other hyperscale clouds. Furthermore, the solution depends on the Microsoft Azure cloud for its ML capabilities.

Coupa

Coupa is a Niche Player in this Magic Quadrant. Its Coupa AI-driven platform provides a set of supply chain applications, including strategic network design, sourcing, procurement, supply and demand planning, and inventory optimization. Serving midsize-to-large enterprises globally (with a focus on North America, Latin America and Europe) across many

industries, Coupa also emphasizes emerging AI capabilities, most notably through its Coupa Navi AI assistant, ML-based prescriptions and community benchmarking.

Strengths

- **Configure functionality coverage:** Coupa has strong supply network design and modeling capabilities supporting long-term, strategic planning decisions. These capabilities support long-term demand and supply planning to optimize capacities across the supply chain, including the modeling of a broad range of constraints, including environmental, social, and governance (ESG).
- **Composability:** Coupa rates above average for its vision for composability. This strength extends from a focus on platform APIs, low- and no-code extensibility, and microservices architecture enabling strong future flexibility in the platform. Coupa's spending on research and development (R&D) also reflects a strong focus on bringing these innovations to life.
- **Customer engagement and enablement:** Coupa fosters customer engagement by hosting two major user conferences each year, located in North America and Europe. They further support their customers through quarterly customer advisory board meetings, held in various regions, alongside regular newsletters, webinars and white papers. Coupa University's comprehensive training and certification program includes online and in-person classes to ensure ample opportunities for skills enhancement and renewal.

Cautions

- **Capability breadth:** Coupa has clear strength in supply network design and modeling, which can lend itself to S&OP as well. However, it is less strong in more operational planning decisions, including interfacing with typical supply chain execution (SCE) solutions, such as WMS, product life cycle management (PLM) and CRM. Its limited ability to model execution events and create detailed, operational plans also limits options to realize a decision-centric process leveraging the Coupa solution.
- **Plan granularity:** Coupa's vision for managing detailed, granular planning needs is limited. It has particular weaknesses around tracking and pegging specific materials to customer orders, as well as limited ability to model supply chain activities in less-than-daily time buckets.

- **Deployment options:** Coupa's hybrid deployment approach leverages and integrates its desktop application with cloud-hosted solution capabilities. The desktop application can be hosted in a cloud environment, but this will still result in a suboptimal UX. For the cloud-hosted solution, AWS remains the primary option, whereas the desktop solution may be hosted elsewhere, including GCP, Microsoft Azure and AWS.

Dassault Systèmes

Dassault Systèmes is a Visionary in this Magic Quadrant. Its DELMIA Quintiq product leverages digital twin technology to integrate planning across resource types, including people, materials, machines and transportation. Its operations are mostly in North America, Europe and the APAC region, supporting midsize or large enterprises in process- and discrete-manufacturing industries. Dassault's investments for the future include extending its platform's planning optimization functionality to include product design and manufacturing, as well as AI and ML integrations to improve advanced analytics and scenario management.

Strengths

- **Capability breadth:** Dassault Systèmes has a strong vision for supporting the strategic, tactical and operational planning layers and extending into design, engineering and execution. Dassault Systèmes supports capabilities ranging from network design and inventory optimization to order promising, detailed scheduling, workforce, transportation and broad execution visibility.
- **Industry and geographic strategy:** Dassault Systèmes has a large, global presence across regions, complemented by a broad focus on industries across process and discrete manufacturing, as well as distribution-intensive industries with a slightly higher weight on the discrete manufacturing vertical. This aids in making it an attractive partner for organizations that require global deployments across industries.
- **Deployment options:** The Dassault Systèmes SCP solution can be deployed on a variety of hyperscale clouds, as well as on-premises. This gives customers broad options to choose their preferred deployment method.

Cautions

- **Decision-centric planning:** Dassault Systèmes' vision for enabling decision-centric planning includes capabilities to make event-driven decisions through leveraging internal

events and calculating the effect of these events on the demand/supply balance.

However, the vision is lacking in relation to embedding broader event signals, evaluating the impact from a wider perspective and embedding composable processes.

- **Pricing and Implementation:** Dassault Systèmes planning solution is often deployed in more complex environments. This may explain its more complex pricing model, higher delivery costs and longer implementation timelines in these cases.
- **Upgrade frequency:** When compared with other vendors in this Magic Quadrant, Dassault Systèmes' delivery of version upgrades is less frequent, less structured and requires customer support for testing to deploy newer versions. This limits the agility of the solution and puts a strain on customer resources.

e2open

e2open is a Niche Player in this Magic Quadrant. Its SCP products broadly focus on integrated planning, alongside support for both demand planning, supply network planning and multienterprise planning. Its operations are primarily situated in North America, Western Europe and the APAC region (excluding Japan). Its clients tend to be midsize-to-large enterprises in the high-tech and electronics industries, industrial manufacturing or consumer products. e2open's investments for the future target a "connected planning" approach that consolidates and integrates end-to-end enterprise planning into a singular platform.

Strengths

- **Digital and AI:** e2open has a strong vision for supporting digital and AI, offering a broad range of different techniques, such as deep learning, process mining, ML, and natural language processing (NLP) and generation. Its vision also includes leveraging GenAI to drive explainability across the solution through a conversational user interface (UI).
- **Pricing model:** e2open's strategy for pricing its solution is quite simple, compared with other vendors evaluated in this research. This helps clients understand how costs can scale as their scope and organization grow and needs change as they mature in their transformation journeys.
- **Customer engagement and enablement:** e2open's strategy for customer engagement includes hosting two annual user conferences in North America and Europe. It also engages with customers through customer advisory boards, newsletters, webinars and

whitepapers. The e2open University offers a training and certification program, including e-learning and instructor-led training, giving customers broad opportunities to upskill.

Cautions

- **Capability coverage:** e2open's current breadth of capabilities is below average, compared with other vendors in this Magic Quadrant. Areas such as detailed production scheduling and network design are not offered, nor does it have a vision to do so. This prompts customers to search elsewhere to cover these gaps, which may create complexity in their overall system architecture.
- **Platform Complexity:** Although e2open's integrated platform provides opportunities to connect planning to SCE, its conversion of acquired capabilities into a unified solution is slower-than-average.
- **Overall viability:** e2open's financial viability rating is comparatively low, as are its employee satisfaction scores. This contributes to a below-average overall viability rating.

ICRON

ICRON is a Visionary in this Magic Quadrant. Its ICRON Customer Centric Supply Chain Planning solution offers a broad range of capabilities, from demand planning through detailed scheduling. Its operations focus mostly on Eastern and Western Europe, with clients in small to large organizations in industries, such as chemicals, industrial manufacturing and consumer durables. ICRON's investments for the future prioritize its platform's flexibility and adaptability to help clients tailor their responses to diverse business challenges.

Strengths

- **Modeling of constraints:** ICRON has a strong vision for the range of constraints it can model and optimize in its solution, which go beyond the traditional supply chain resources and into such areas as ESG. It combines this with a broad range of analytics to generate optimized plans through the different tiers of the supply chain.
- **Functional capabilities:** ICRON is among the top performers in terms of functional capabilities in the platform. It covers a broad range of capabilities across demand and supply planning, with deep functionality and expertise, as well as capabilities that extend beyond traditional SCP and into workforce planning.

- **Industry coverage:** ICRON has strong industry coverage for manufacturing companies, especially in discrete manufacturing, as well as chemicals, food and beverage, and consumer products. It also has a good spread of customers of different sizes, making it relevant for a broad set of organizations.

Cautions

- **Vision for digital and AI:** Although ICRON has a vision for leveraging areas such as deep learning and big data, its use of a broader set of techniques, such as robotic process automation (RPA) and process mining, is less strong. This gives customers less choice and opportunity to take advantage of the broader spectrum of these capabilities.
- **Geographic strategy:** Although ICRON is growing its partner network, it has few offices, distributors and VARs, compared with other vendors in this Magic Quadrant. This may present challenges to large, global companies that want to deploy their SCP solutions across many regions.
- **Third-party implementation services:** Being a smaller vendor in the SCP solutions market, ICRON has significantly fewer third-party implementation partners than other vendors in this Magic Quadrant. Although it's expanding in this area, this leaves customers with fewer choices when it comes to available partners that can be used in their implementation journeys.

John Galt Solutions

John Galt Solutions is a Challenger in this Magic Quadrant. Its Atlas Planning Platform delivers a broad range of end-to-end planning capabilities that range from strategic network modeling to production planning. Its operations are geographically diverse, with a particular focus in North America, Western Europe and the APAC region. Its clients tend to be midsize-to-large enterprises across a wide variety of industries. John Galt Solutions' investments for the future aim to seamlessly link finance, planning and execution through its Atlas Planning Platform. Specifics include improving AI and ML capabilities to enhance decision intelligence.

Strengths

- **Customer experience:** John Galt Solutions receives strong customer feedback in several areas, such as customer service and support, and evaluation and contract negotiations.

Customers also express a higher tendency to recommend the solution to others. This contributes to an overall customer experience above average.

- **Implementation time:** John Galt Solutions' implementation times — covering demand, supply and S&OP — are shorter than the average among their peers. They leverage a wide variety of templates, alongside standard implementation methodologies, to achieve this.
- **Pricing:** John Galt Solutions offers a straightforward pricing approach based on revenue and planning workflows. Furthermore, the cost of the solution tends to be lower than other products evaluated in this Magic Quadrant.

Cautions

- **Managing uncertainty:** John Galt Solutions' vision for handling uncertainty in SCP contains elements such as risk mitigation and probabilistic planning techniques; however, its communicated vision overall is comparatively less tangible and lacks partnerships to embed broader risk perspectives.
- **Breadth of coverage:** The Atlas Planning Platform has narrow functional coverage, compared with some other vendors in this Magic Quadrant. It compensates for this through strategic partnerships in areas such as network design and detailed scheduling, making it dependent on partner providers to deliver broad solutions to customers.
- **Support hours and languages:** John Galt's help desk is open Monday through Friday within business hours, with 24/7 support available at a cost for the customers requiring this through its Premium Support offering. It supports a limited number of help desk languages, and, although customers can choose between different languages within the solution, the default language of English will remain for certain UI components, such as help functions and tables.

Kinaxis

Kinaxis is a leader in this Magic Quadrant. Its Maestro platform offers orchestrated planning for capabilities across S&OP, demand/supply planning, production planning and execution. Its operations are geographically diverse, but focus mainly in North America, Western Europe and the APAC region. Its clients tend to be midsize-to-large enterprises in a variety of industries, but especially in high-tech, electronics and life sciences. Kinaxis' investments for the future focus on further integrating AI into its platform to improve decision intelligence and planning alignment.

Strengths

- **Planning automation:** Kinaxis' vision for increasing automation on each layer of the supply chain, across demand and supply to the execution level, is strong. AI-driven automation is incorporated into many areas across the solution, such as enhancing data cleansing, scenario and workflow generation, and parameter tuning to drive greater efficiency and accuracy.
- **Composability:** Kinaxis' vision for platform composability features strong capabilities for providing an extensible platform with no-code/low-code configuration capabilities, a marketplace for algorithms, and standard integration and functional APIs. Its evolving microservices architecture is designed to give customers high flexibility in how to structure the solution.
- **Global deployments:** Kinaxis' broad set of functional capabilities, combined with a strong geographic strategy, makes it attractive to many customers. Its solution is often deployed globally in organizations, with a wide set of functional capabilities across demand and supply planning.

Cautions

- **Customer sentiment:** Some of Kinaxis' customers indicate average satisfaction with areas such as customer service and support, evaluation, and contract negotiation. This is further reflected by a comparatively lower score in customer stickiness, although its net customer retention rate remains in the high 90s.
- **Technical support:** Kinaxis provides 24/7 help desk support to all customers for high-severity cases with the option for expanded services for customers with its "premium extended services" package, which comes at a cost. Maestro is available in multiple languages, including English, French and German (seven languages in total). Although the software defaults to English, customers have the flexibility to import their preferred languages. Non-English languages are not preloaded in the solution, which may require additional configuration during deployment.
- **Pricing:** Kinaxis' pricing model has been simplified recently and now contains revenue-tiered pricing for modules alongside user pricing. However, its price level is still above average, compared with other vendors in this Magic Quadrant.

Logility

Logility is a Challenger in this Magic Quadrant. Its Logility Decision Intelligence Platform supports end-to-end (E2E) enterprise and multienterprise planning through network design, S&OP, demand planning, inventory optimization and production scheduling. Its operations are geographically diverse, but with a focus on North America. Its clients range from small to large enterprises in a variety of industries, particularly those in consumer products, food and beverage, and footwear and apparel. Logility's investments for the future leverage GenAI to improve strategic decision making, while lowering the amount of expertise required to complete planning tasks. In January 2025, technology provider Aptean entered into a definitive agreement to acquire Logility, with a close expected in April 2025.

Strengths

- **Decision automation and alignment:** When compared with other vendors in this Magic Quadrant, Logility's vision for supporting alignment of plans horizontally (supplier-to-customer) and vertically (strategic, tactical and operational) is above average. It offers strong support for decision automation in each of these layers, including demand, inventory and supply-based functional, and E2E automation.
- **Vision for digital and AI:** Logility's vision for leveraging digital and AI technologies is stronger than other vendors in this Magic Quadrant. Logility envisions taking advantage of technologies such as GenAI, big data and deep learning to lower the bar of entry for customers looking to exploit these innovative capabilities.
- **Customer experience:** Logility is above average in its customer engagement, customer service and technical support, compared with other vendors in this Magic Quadrant. This is supported with a strong certification program, customer councils and conferences aiding its customers on a digital SCP journey.

Cautions

- **Pricing:** Logility's solution is more expensive than other vendors in this Magic Quadrant, which has been a growing trend for it during the past few years, alongside its replatforming and expansion of capabilities. Furthermore, its pricing model is less transparent and includes GenAI-specific pricing in some instances.
- **Uncertainty management:** When compared with other vendors in this Magic Quadrant, Logility's vision for managing uncertainty is lower than average. It includes focusing on supplier and demand risk, but lacks areas such as partnerships with risk providers and a

framework for experiment-based approaches with simulation. This may limit a customer's ability to align with an antifragile planning approach.

- **Cloud deployments:** Compared with most other vendors in this Magic Quadrant, Logility has a lower percentage of customers that have deployed its primary SCP solution in the cloud. It also has a lower percentage of on-premises customers that have migrated to cloud deployment models. Supporting its significant on-premises customer base and/or transitioning them to the cloud version will require Logility resources.

Manhattan Associates

Manhattan Associates is a Niche Player in this Magic Quadrant. Its recently introduced Manhattan Active Supply Chain Planning platform unifies demand planning and inventory planning, including replenishment and allocation capabilities enhanced via AI/ML capabilities. The target market for its solution is distribution-intensive environments, including retailers and wholesalers. It has offices in North and Latin America; the APAC region, including Japan; and Western Europe. Its unified SCP platform includes analytics and collaboration capabilities to enhance overall supply chain performance. It plans to continue to build out its vision for a unified supply chain and planning platform, further enabled by advanced AI/ML techniques.

Strengths

- **Implementation and upgrades:** The solution rates above average for its approach to managing software updates. New functionality is released each quarter, and customers have the flexibility to disable or enable the new release's incremental functions, as it fits their needs.
- **Solution simplicity:** The cloud-native, platform-based approach to SCP creates a unified UX and analytical environment for demand planning, replenishment, allocation and inventory planning. Its simple architecture makes it easy for customers to navigate its solution portfolio.
- **Simple pricing:** Manhattan Associates's pricing model is clear and simple. It is based on stock-keeping units (SKUs)/locations managed by the platform. There is no pricing by module (as is the case for many other SCP solution providers). This means that customers get access to all solution modules through the subscription.

Cautions

- **Capability breadth:** Manhattan Associates's vision for supporting the different layers of planning across strategic, tactical and operational planning decisions is comparatively weak. It has made a strategic choice to focus primarily on demand planning, replenishment planning and inventory optimization, with little or no support related to manufacturing capacities. It also does not cover areas such as network design or detailed scheduling. This is likely due to its focus on the distribution-intensive verticals, which do not require manufacturing capacity planning.
- **Range of analytics:** Manhattan Associates has a narrow vision for the range of analytics offered in the solution. It contains heuristics and some discrete event simulation, but is lacking in areas such as optimization algorithms, broader ML techniques and stronger probabilistic planning approaches. This limits customers's choice of appropriate algorithms to create end-to-end feasible plans.
- **Deployment options:** The platform is intended for deployment only on GCP. For China specifically, the solution can be deployed on the Alibaba cloud. The main focus on a single hyperscaler may create complications for organizations that have a strategic focus to deploy on other hyperscale clouds, such as Microsoft Azure or AWS.

o9 Solutions

o9 Solutions is a Leader in the Magic Quadrant. The o9 platform delivers broad capabilities across demand and supply planning. Its operations are concentrated in North America, the APAC region, including Japan; and Europe, the Middle East and Africa (EMEA), with a limited presence in Latin America. Its customers tend to be large organizations across various industries, with a particular focus on consumer products, retail and manufacturing. The platform offers configuration and customization, and o9 Solutions continues to formalize its solution building blocks and industry reference model approach to improved speed of deployment and value realization.

Strengths

- **Digital supply chain twin:** The o9 Solutions platform vision covers most of the essential building blocks for a digital supply chain twin, with strengths in supply chain visualization, targets, policies, rules and constraints. Its vision also includes leveraging low-latency, granular data supported by its proprietary graph database.
- **Composability:** o9 Solutions demonstrates a comparatively strong vision for composability. The platform supports embedding specialized and customer-proprietary

algorithms emphasizing its extensibility. It also offers functional APIs that facilitate the management of external and internal application triggers.

- **Customer engagement and enablement:** o9 Solutions actively engages with its customers through a variety of events, including in-person and virtual conferences, customer advisory boards, newsletters, and webinars. Its AIM10x annual conference series takes place across multiple continents, and its customer advisory boards meet at least quarterly. Furthermore, its online training service offers extensive training programs, with a growing number of certified end users.

Cautions

- **Sales strategy:** o9 Solution's number of net new customers is below average, which may be due to its focus on large enterprises. At the same time, its head count growth remains comparatively high, which is likely to be beneficial in the longer run, as the number of skilled resources in the marketplace continues to grow. However, in the short term, it is a caution, due to the number of new employees the company needs to absorb.
- **Pricing:** The pricing model for the o9 Solution's platform is simple (based on only a few factors), but opaque compared with its peer competitors. Its pricing level also tends to be above average in annual licensing cost, derived from customers' annual revenue tier and workflows in-scope.
- **Customer stickiness:** Although showing positive trends in this category, o9 Solutions still has a lower customer stickiness, compared with other vendors in this Magic Quadrant. This may be caused by the high growth of o9 Solutions in past years, which is positive, but also a caution for existing customers, because they need to share resources with new accounts.

OMP

OMP is a Leader in this Magic Quadrant. Its Unison Planning solution offers near-complete coverage for all aspects of SCP, from network modeling to detailed scheduling. Its operations are geographically diverse, with a focus on Western Europe and North America, and its clients tend to be large enterprises in process-manufacturing industries. OMP's investments for the future focus on scaling its platform's underlying architecture to improve data and stakeholder access, as well as implementing additional AI tools to drive autonomous digital planning.

Strengths

- **Capability breadth:** OMP has a strong vision to support all the layers of planning from network design decisions to operational planning decisions. It combines this with a strong vision for enabling execution visibility through a variety of internal and external data sources leveraging its Data Genie module and technology partnerships.
- **Modeling of constraints:** OMP's vision and execution for modeling a broad range of constraints beyond the typical supply chain constraints, such as sustainability through its "green planning" initiative, is comparatively strong. Combined with a broad range of analytics, it enables the creation of optimized plans across the supply chain.
- **Customer experience:** OMP performs strongly across almost all of the customer experience subcriteria, including positive customer intentions to recommend the solutions to others. This is supported by strong feedback on service and support, as well as technical support, and above-average capabilities for customer enablement through certification programs.

Cautions

- **Industry strategy:** OMP's experience stems from primarily process manufacturing industries such as chemicals, pharmaceuticals, metals and consumer packaged goods (CPG); it is less focused on discrete manufacturing and distribution-intensive industries. This emphasis on process manufacturing could be a challenge for companies that require experience in multiple verticals.
- **Geographical strategy:** OMP has few distribution partners and no VARs, which means it relies heavily on its own sales teams. Despite a solid coverage of offices across regions, this contributes to a below-average score for geographic strategy.
- **Price level:** OMP has a simple functionality and per-user pricing model, but the overall price is typically high, compared with other vendors in this Magic Quadrant.

Oracle

Oracle is a Leader in this Magic Quadrant. The Oracle Fusion Cloud Supply Chain Planning (SCP) solution covers a broad range of planning capabilities. Oracle's operations are global, with a presence across multiple industries, enabling it to support a diverse and extensive client base. Its investments for the future focus on decision intelligence, automation and planner productivity, as well as evolving its functional capabilities across industries.

Strengths

- **Vision for digital and AI:** Oracle leverages its enterprise competences in advanced analytics to obtain a strong vision for digital and AI in SCP. Its vision contains a broad range of techniques, such as big data, deep learning, RPA, process mining, NLP and generation, and GenAI. This gives customers the opportunity to explore these innovative capabilities for SCP.
- **Global reach:** Oracle is a large global company, with the capability to support global deployments, using its own offices around the world, as well as its extensive consulting partner network.
- **Pricing:** Oracle has clear pricing and a lower-than-average price level. Its pricing model is based on number of users and licensed modules, and can be favorably priced for both midmarket and large customers. Oracle further offers the option for consolidated enterprise pricing, regardless of modules in-scope.

Cautions

- **User experience:** Oracle continues to have opportunities to create a stronger vision for the UX as part of the Redwood UX transformation, which is still being rolled out across the SCP applications. Its vision in areas such as providing explainability and increasing the user adoption is limited, compared with other vendors.
- **Portfolio complexity:** Oracle offers a number of solutions in its portfolio to support the vast scope of SCP, which may be confusing to customers. Furthermore, the varying look and feel across applications in Oracle's SCP product portfolio creates a perception of disconnected applications.
- **Deployment options:** Oracle's solution is designed for deployment on Oracle Cloud Infrastructure (OCI), which can be made available in both private and public cloud configurations. The lack of options may present challenges for customers who prefer other hyperscale cloud providers.

QAD

QAD is a Niche Player in this Magic Quadrant. The QAD Digital Supply Chain Planning (DSCP) solution provides end-to-end capabilities from demand planning and S&OP to production planning and procurement. QAD's operations are geographically diverse, with offices in North America, EMEA and the APAC region (excluding Japan). It is focused on meeting the

needs of midsize organizations, especially in process-manufacturing industries. QAD acquired Phenix Software in October 2024, which is being transformed into QAD Advanced Scheduling to support detailed supply-planning decisions.

Strengths

- **Modeling constraints:** QAD rates above average for its broad range of resource types, which can be modeled in their solution. This covers typical manufacturing and distribution resources, and also extends to cover both financial resources and environmental resources like energy, water and greenhouse gases (GHG).
- **Geographic strategy:** QAD rates above average for the number of resellers and distributors it works with globally, as well as the number of implementation partners. Customers benefit from this by having more choice in terms of engaging with QAD and selecting implementation partners to help them realize the value of QAD's capabilities in SCP.
- **Sales execution:** QAD rates above average for several elements related to sales execution, including having a simple pricing model based on licensed modules and users, offering more competitive pricing and providing shorter implementation timelines than many of its competitors.

Cautions

- **Digital and AI:** QAD has a limited vision, compared with its peers, for leveraging areas such as big data and reinforcement learning, but with positive initiatives within process mining. It focuses more on using the outputs of external data-analysis routines and environments, using a heuristic-centered approach that may be a good fit for its typical customer profile.
- **Customer enablement:** QAD scores below average for customer enablement. Although it has an online training portal, there is limited awareness of QAD training and certification offerings in the market. Furthermore, QAD's help desk is only available in English and French, which creates challenges for customers with other language preferences.
- **Deployment options:** QAD has limited deployment options, compared with its competitors. It supports deployment on AWS, but not other hyperscalers, which can be an obstacle for potential customers with a preference to deploy on other hyperscale clouds or on-premises.

QAD did not respond to requests for supplemental information. Hence, Gartner's analysis is based on other credible sources.

RELEX Solutions

RELEX is a leader in this Magic Quadrant. Its Supply Chain & Retail Planning Platform supports SCP functionality ranging from S&OP, demand planning and manufacturing planning, and scheduling, to more retail-specific functionality, such as promotion optimization. Its operations are geographically diverse, largely focused in Europe, with continued growth in North America. Its clients span from small-to-large enterprises in several industries, especially in the retail segment, but it has a presence in other industries as well. RELEX's investment priorities include moving its platform toward a closed loop driven by algorithmic intelligence and AI-enabled capabilities.

Strengths

- **Product Strategy:** RELEX's vision for supporting a broad product strategy is stronger than that of other vendors evaluated in this Magic Quadrant. It has a strong vision for supporting granular levels of planning and reducing the latency of the data that influences decision making (coupled with strong vision for analytics and supporting a digital supply chain twin). RELEX is well-positioned to deliver on its customers' maturity aspirations.
- **Modeling of constraints:** RELEX's vision is to provide visibility to a large breadth of constraints that range from typically supply chain constraints to nontypical financial and ESG-focused constraints. In addition to visibility, RELEX has a vision to handle single-objective and multiobjective optimization of these constraints to provide strong supply chain planning.
- **Customer Experience:** RELEX customers tend to remain with the provider at renewal. This is likely due to strong customer engagement across a variety of avenues (e.g., conferences and user groups); above-average technical support; frequent updates to the offering; and above-average scores for issue resolution.

Cautions

- **Uncertainty management:** RELEX's vision for managing uncertainty in SCP is weaker than other vendors evaluated in this Magic Quadrant. RELEX's vision is mainly focused on handling internal uncertainty with probabilistic approaches for demand. However, it is

more limited when it comes to incorporating risk in a broader perspective and incorporating antifragile perspectives.

- **Pricing strategy:** Pricing for RELEX's platform is based on the functionality deployed and the size and complexity of the business. The definition of complexity can vary based on the customer setup, which makes RELEX's pricing model less transparent. In addition, RELEX prices its solution well above the average for vendors in this Magic Quadrant.
- **Geographic Strategy:** RELEX's vision for supporting a large global footprint is comparatively weaker than that of other vendors in this Magic Quadrant. Although there is a strong distribution partner network, RELEX operates in fewer regions globally and has fewer VARs, which could affect larger global footprint organizations.

SAP

SAP is a Challenger in this Magic Quadrant. Its Integrated Business Planning (IBP) solution supports such areas as demand planning, inventory optimization, S&OP and supply planning. Its operations are geographically diversified, and its clients tend to be midsize-to-large enterprises across a wide variety of industries. The breadth of SAP's overall offerings and real-time integration makes it especially suitable for companies with SAP ERP systems. SAP's investments for the future support autonomous supply chains' intelligence and resilience by embedding AI and ML capabilities to analyze and predict plans, as well as probabilistic planning and event simulation to prepare for unknown events.

Strengths

- **Industry and geographical coverage:** SAP serves a large number of industries, covering more industries than any other vendor in this Magic Quadrant. SAP also has a large global reach, with offices, and a broad ecosystem of resellers and implementation partners across all eight regions defined in this research. This broad approach enables SAP customers to benefit from its global presence and broad experience with diverse portfolios across verticals.
- **Marketing execution:** SAP is a well-known vendor in the SCP solutions market, due to its broad set of business capabilities. Consequently, it is often being evaluated by customers as a possible contender to be used for global, large-scope SCP transformation projects.
- **Technical support:** SAP scores high in this Magic Quadrant for its technical support capabilities with 24/7 help desk support offered across more languages than the average.

Its stated service-level agreement (SLA) times for resolving critical issues are also shorter than average and are available to customers as standard.

Cautions

- **User experience:** SAP's vision for UX is comparatively below average. Its vision for explainability contains elements around impact drivers for demand, inventory and supply plans, but it is lacking a more extensive scope. Although it is evolving its overall SAP strategy for GenAI and agentic AI, its vision for using GenAI through assistants and chatbots in SCP is comparatively weaker.
- **Vision for speed and scalability:** SAP's vision for scalability is limited, in that it does not allow customers to choose the preferred hyperscaler cloud for deployment. SAP does, however, use hyperscalers for the infrastructure in SAP Data Centers. Furthermore, its vision to support continuous planning is less robust than its peers, with more manual interventions required by planners.
- **Customer stickiness:** Although SAP is increasing efforts to engage with customers, data shows that customers are less likely to recommend SAP to peers, compared with customers for other vendors in this Magic Quadrant. Although customer subscription renewal rates are quite high, they are slightly lower than average, when compared to peers.

Slimstock

Slimstock is a Niche Player in this Magic Quadrant. Its Slim4 solution focuses on S&OP, sales and operations execution (S&OE), demand and replenishment planning, inventory management and supplier collaboration. Its operations are geographically diverse, with its largest footprint in Western Europe. Its clients tend to be small-to-midsize companies; however, they also include larger enterprises from several industries, particularly from the wholesale and distribution, consumer products and retail. Slimstock's investments for the future look to improve visibility of plan impacts across all time horizons and expand AI/ML capabilities to reduce the number of manual interventions required.

Strengths

- **Sales strategy:** Slimstock continues to display a strong sales strategy, maintaining a strong organic growth and adding an above-average percentage of SCP customers to its

client base during the past year. To achieve and support this growth, it has gradually increased the number of employees across several regions.

- **Customer enablement:** The Slimstock academy offers both standardized and custom training programs with a variety of ways to learn across roles and levels of expertise. It also includes certifications across different user groups. Postimplementation, Slimstock continues its engagement with customers through crafted and specific support, including adoption audits and maturity assessments.
- **Platform simplicity:** Slimstock capabilities are all natively built in the Slim4 solution, using the same underlying data model, which makes it a simple and intuitive solution to navigate for customers. That correlates well with the typical needs of its small-to-midsize customer base, which often looks for straightforward solutions at affordable prices.

Cautions

- **Capability breadth and coverage:** Slimstock's vision to cover the extensive scope of SCP across different types of planning decisions is narrow, compared with other vendors in this Magic Quadrant. This also shows in the current breadth of the platform, which is mainly focused on S&OP, S&OE, demand planning, inventory and replenishment planning, with limited capabilities for capacity and production planning.
- **Range of analytics:** Slimstock's vision for range of analytics contains some heuristics and ML algorithms in its Slim4 solution to help generate feasible plans; however, it lacks a stronger vision for the use of optimization, reinforcement learning and probabilistic planning. Furthermore, it has no vision for simulation techniques.
- **Implementation partners:** Slimstock does not leverage implementation partners for the delivery of its solution. Hence, customers depend fully on the Slimstock resources for their implementation journeys, limiting customers' choice of preferred, third-party partners.

ToolsGroup

ToolsGroup is a Niche Player in this Magic Quadrant. Its Service Optimizer 99+ (SO99+) solution covers S&OP, demand planning, replenishment and inventory planning, transportation planning, and optimization. Its operations are geographically diverse, with a focus on Western Europe, followed by North America. Its clients range from small-to-large organizations across many industries. ToolsGroup's investments for the future target

expanding the breadth and depth of its solution's offerings in areas such as real-time monitoring and cloud services.

Strengths

- **Capability breadth:** ToolsGroup's vision for covering planning decisions across planning layers (i.e., strategic, tactical and operational) is above average, compared with other vendors in this Magic Quadrant. Investments in its solution with Data Hub and Decision Hub support this vision when coupled with strong technology partnerships, with companies such as River Logic and Plannet covering network design and scheduling, respectively.
- **Managing uncertainty:** ToolsGroup's vision for handling uncertainty is above average, compared with other vendors in this Magic Quadrant. With a strong heritage in applying probabilistic approaches for demand and supply, coupled with partnerships for risk monitoring and modeling, ToolGroup is well-positioned to execute on this vision.
- **Pricing:** ToolsGroup's pricing model, based on users and item/location, is transparent and simple, compared with other vendors. Combined with an affordable price level, it positions itself as attractive for midmarket and enterprise customers looking to mature their planning technology.

Cautions

- **Modeling of constraints:** ToolsGroup's vision for supporting and optimizing a broad range of resources is weaker than that of other vendors in this Magic Quadrant. Although ToolsGroup supports a broad range of resources, its focus is stronger on finished goods planning than on manufacturing capacities.
- **Industry strategy:** ToolGroup has a strong footprint in the distribution-intensive vertical and in industrial manufacturing, with a good portion of customers across. However, it has less focus on the process manufacturing verticals, which can be challenging for companies with diverse product portfolios that require considerable experience in those industries.
- **Deployment:** ToolsGroup has fewer internal resources and implementation partners to support deployments, compared with other vendors in this Magic Quadrant. The options for deployment, which are mainly delivered through Microsoft Azure, are also limited. This restricts prospective customers's options for a flexible deployment to meet their specific needs.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

The following vendors were added to this Magic Quadrant because they had sufficient customer interest, as defined by Gartner in its SCP solution Customer Interest Indicator (CII, which is part of the inclusion criteria):

- Board International
- ICRON
- Manhattan Associates
- QAD

Dropped

The following vendors no longer appear in this Magic Quadrant, because they did not meet the inclusion criteria for the CII:

- Adexa
- AIMMS
- Blue Ridge
- GainSystems

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, vendors had to meet three criteria:

- All of the following SCP solution capabilities must have been commercially available (in general availability) as of 12 November 2024. Eligibility for initial consideration is determined by reviewing publicly available sources of information, including the vendor's website, for mentions of the following capabilities as part of a standard product offering:
 - **Demand planning:** Support for development of a consensus-driven demand plan that optimizes the balance between market opportunity and supply network capability.
 - **Supply planning:** Support for the translation of demand expectations into supply network requirements that orchestrate reliable, efficient delivery outcomes.
 - **End-to-end SCP:** Support for aligning horizontal and vertical planning decisions across the internal enterprise supply chain and into external trading partners.
 - **Financial impact analysis and planning:** Support for the ability to handle more and more of an organization's financial decisions within the SCP process, rather than outside it.
- The vendor must have an official office, branch or affiliate in at least three of the following eight regions considered for this market: North America; Latin America; Western Europe; Eastern Europe; Middle East and North Africa; Sub-Saharan Africa; APAC (comprising mature APAC, China, emerging APAC and Eurasia); and Japan. One of the three offices had to be in North America or Western Europe.
- The vendor had to rank among the top 20 SCP solution providers for the CII, as defined by Gartner for this Magic Quadrant. CII is calculated using a weighted mix of internal and external inputs that reflect Gartner client interest, vendor customer engagement and vendor customer sentiment.

Honorable Mentions

The following vendors, which have reasonably capable — and, in some cases, strong — SCP solutions did not qualify for inclusion in this Magic Quadrant. This does not mean that their solutions might not be viable alternatives for some customers:

- **AIMMS** is a privately held vendor headquartered in the Netherlands. AIMMS delivers SCP capabilities through its Optimization Tooling and SC Navigator. Using Optimization Tooling, customers can build and deploy custom-fit SCP apps across all layers of demand and supply planning, including S&OP and detailed scheduling, to provide E2E SCP

functionality. Via SC Navigator, customers have access to network design and tactical planning. AIMMS did not meet the inclusion criterion for CII.

- **Blue Ridge** is a privately held global vendor headquartered in the U.S. Its solution includes demand planning, IBP, replenishment and supply planning modules on a cloud-based platform with integrated workflows among solutions. A focus on forecast improvement and inventory management supports its market penetration in B2B distribution-intensive industries, such as wholesale, distribution and retail. Blue Ridge did not meet the inclusion criterion for CII.
- **Eyelit Technologies** is a privately held vendor headquartered in the U.S. It provides SCP capabilities through its acquisitions of Optessa (February 2024) and Adexa (January 2025), enabling it to cover industry-specific aspects of planning from S&OP and demand planning to scheduling. Eyelit did not meet the inclusion criterion for CII.
- **FuturMaster** is a privately held vendor headquartered in France. It leverages AI-driven insights and other big data technologies to provide solutions focused on generating the optimal forecast to drive optimization throughout the supply chain. Its Bloom platform includes the standard demand and supply functionality, with a preponderance of deployments in food and beverage process manufacturing. It acquired PlaniSense in Feb 2025, adding production planning and scheduling capabilities to the platform. FuturMaster did not meet the inclusion criterion for CII.
- **GainSystems** is a privately held vendor headquartered in the U.S. Its GAINS Performance Optimization Platform supports E2E planning, including network design and spare/service parts planning. GAINS mainly serves industries, such as industrial manufacturing, defense, distribution, retail, and spare parts/maintenance, repair and operations. GainSystems did not meet the inclusion criterion for CII.
- **Infor** is a privately held vendor headquartered in the U.S., with a background in ERP. It has a large portfolio of solutions that includes a variety of SCP capabilities. Infor's OS Data Lake and multitenant, cloud-based solution support planning at the lowest level of granularity needed. Infor did not meet the inclusion criterion for CII.
- **River Logic** is a privately held software vendor headquartered in the U.S. It offers a suite of packaged applications on its Digital Planning Twin SaaS platform, including a wide range of optimization solutions covering cost to serve, SCP, financial planning, and production planning. In addition, River Logic's Value Chain Optimization suite of solutions includes network design and manufacturing footprint optimization, while also supporting

profitability modeling, tariff mitigation and resilience analysis. River Logic did not meet the inclusion criterion for CII.

- **sedApta** is a software vendor that is part of Elisa Industriq, a global player in manufacturing IT solutions with headquarters in Finland. Its sedApta Suite delivers SCP and SCE capabilities, including demand sensing, S&OP, S&OE and manufacturing operations management. sedApta has a strong presence in discrete- and process-manufacturing environments, with a large team of specialists focused on driving innovation in smart manufacturing. sedApta did not meet the inclusion criterion for CII.
- **Solvoyo** is a privately held vendor headquartered in the U.S. Its cloud-based platform supports E2E supply chain analytics, planning and optimization. Its modular approach enables solutions tailored to specific requirements, emphasizing automated decision processes using AI and digital twin technology. Its solutions come with built-in user adoption tracking capabilities, enabling companies to monitor and improve the level of decision automation. Solvoyo did not meet the inclusion criterion for CII.
- **Wolters Kluwer** is a publicly listed company headquartered in the Netherlands. Its CCH Tagetik portfolio has a background in corporate performance management, including financial planning and analysis. CCH Tagetik offers IBP and SCP solutions by leveraging AI-based predictive intelligence. Wolters Kluwer did not meet the inclusion criterion for CII.

Evaluation Criteria

Ability to Execute

Gartner evaluates vendors on their ability to offer and support an SCP solution that enables customers to achieve the goals of their existing and future SCP processes. This evaluation covers:

- Features available in a vendor's portfolio of products that support SCP, including how it's delivered to market
- Methods used by a vendor to help customers deploy, maintain and develop instances.
- Opportunities for a vendor's customers to be educated on, and to use, best practices and emerging practices for E2E SCP.

- Techniques and features to increase the overall user adoption of the solutions.

Vendors are also evaluated on how well their efforts to market and communicate their vision for their product resonate with the market. This is reflected in:

- The number of customers using the current instance of the product
- Recognition by customers in the market
- The likelihood that customers will extend their use of a vendor's product in terms of functionality, as well as across geographies, as they execute their strategies to move toward higher levels of SCP maturity.

As shown in the table below, the evaluation criteria for product or service, market responsiveness/record, customer experience and operations have high weightings. They represent the primary drivers for vendor selection among the Ability to Execute criteria. Buyers are most interested in product functionality, vendors' tendencies to act on the vision set out in their roadmap, the level of satisfaction expressed by a vendors' customers, and how the vendor operates during and after implementation.

The criteria for overall viability, sales execution/pricing and marketing execution receive medium weightings. These criteria assess the overall health of vendors, their ability to deliver software that will return a fast ROI at an affordable price and their recognition in the market.

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Marketing Execution	Medium
Customer Experience	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Operations	High
Market Responsiveness/Record	High
Sales Execution/Pricing	Medium

Source: Gartner (April 2025)

Completeness of Vision

Gartner evaluates a vendor's Completeness of Vision by applying criteria that assess its:

- Ability to understand current market trends.
- Vision for how emerging technologies can further the goals of SCP and ensure adoption of the software.
- Responses to customer needs and competitive forces, as Gartner views them.

Vendors are evaluated on their ability to articulate, to Gartner and to the market, a "statement of direction" for the next two to three years that matches (or surpasses) Gartner's vision for the evolution of the SCP solution market. They should demonstrate an understanding of the major technological and architectural shifts that this market will require, and be able to communicate a believable, tangible roadmap to exploit these and to deliver appropriate solutions.

The criteria for marketing understanding, marketing strategy, offering (product) strategy and innovation receive high weightings. These criteria assess how vendors support a company's digital SCP aspirations and how they envision planning will transform the future planning concepts, as well as converge with cross-enterprise functions beyond the supply chain into a multienterprise ecosystem. These criteria reveal the main differentiators of vendors in this market.

The criteria for sales strategy, business model, vertical/industry strategy (see Note 1) and geographic strategy receive medium weightings. These criteria strongly indicate vendors'

investment and growth strategies, including their vision for supporting customers across industries and geographies.

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (April 2025)

Quadrant Descriptions

Leaders

Leaders demonstrate strong vision and execution capabilities for SCP solutions. They have broad, deep and differentiated functionality that addresses a wide range of user requirements. Their coverage of the main categories of planning capability — configure, optimize, respond and execution visibility (see Note 2) — is typically strong, with a healthy balance across today’s categories and/or those planned for the future.

Leaders have a reasonable range of features to support organizations' maturity journeys. Their vision for supporting a Level 5 maturity planning environment aligns well with Gartner's vision. Leaders anticipate where customer demands and markets are moving and clearly identify how innovative technologies can be applied to planning applications. They have strategies to support emerging requirements to build future-proof SCP solutions that focus on enabling high-quality decision making and achieving a high degree of user adoption. Because Leaders are typically well-established in leading-edge, complex user environments, they benefit from user communities that help them remain at the forefront of emerging needs and innovation.

Leaders typically exhibit strong financial performance and viability with their SCP solutions. They generally have good market penetration and they are often being used broadly by their customers. Many customers have deployed a single instance of a Leader's SCP software that supports large planning models and a high degree of supply chain complexity.

Challengers

Challengers exhibit strong execution capabilities; however, their product roadmaps are not closely aligned with Gartner's view of the future of SCP solutions. They typically have a consistent track record of successful implementations. They provide good support for enabling a Level 3 maturity SCP process, and their software tends to be used as a single global instance for planning. Their product features and technical capabilities are sufficient to support Level 3 maturity planning, but other aspects of their offering are still maturing.

Their understanding of SCP market trends and how to apply innovative technologies to SCP is lagging, which may make it challenging for SCP processes to advance to higher levels of maturity. Customers are usually satisfied with Challengers and get reasonable to good value from these vendors' solutions across their supply chains.

Challengers are preferred by buyers that prioritize Ability to Execute over Completeness of Vision. One of these vendors may be favored if its SCP solution is part of an enterprise's incumbent product or if they have some other pre-existing relationship. Challengers have demonstrated long-term viability, with sound financial results and stable products. The customer experience they provide is sufficient, with customers having resources available to manage and sustain their instance on their own with little support needed from the vendor.

Prospective buyers should evaluate Challengers based on these vendors' current capabilities and gaps, and determine the extent to which any shortcomings will impede short-term

aspirations to higher levels of maturity.

Visionaries

Visionaries articulate a strong vision for their SCP solutions. Their product roadmaps demonstrate a good balance between their understanding of where users' SCP solution requirements are heading and the intended use of key technological developments to help support those requirements.

Visionaries are often thought leaders in one or more key characteristics of SCP technology environments (such as digital supply chain twin, multienterprise planning and/or AI), and their management teams prioritize the development of advanced SCP capabilities. They have compelling product strategies, but may have current functional gaps in their SCP solution, lack live customers, have less recognition in the market or be in relatively weaker financial positions.

They may have developed depth in a specific functional area (e.g., detailed scheduling or finished goods planning), but not yet have enough depth in other capability areas.

Niche Players

Although one might assume that vendors in the other quadrants are better choices for new SCP buyers, depending on the circumstances, a Niche Player can be as good or even better than a Leader, Challenger or Visionary for prospective users. This is because a Niche Player might focus on a specific geography, industry or functional area (such as finished goods planning) relevant to the customer and have strong capabilities and offerings tailored to support it.

Niche Players are often seen as specialists. They are frequently used as suppliers of point solutions to support one or two aspects of SCP, such as demand forecasting, inventory planning or network design, but may also be used more broadly. Organizations may use a Niche Player's solution in conjunction with SCP solutions from other vendors to fulfill E2E SCP needs.

Context

Companies typically look to invest in SCP solutions that will help them advance to higher levels of SCP maturity and to scale as their planning needs evolve. Some companies still evaluate SCP solutions for specific functional needs, such as demand planning, or sales and operations planning, with the intention of using a planning tool's additional features. In the past, these functional needs may have been fulfilled within a heterogeneous SCP application landscape. However, companies found it challenging to support a process that gave them the required visibility across the enterprise and across planning time horizons.

Consequently, SCP solutions evolved into a unified data model environment in which a single model of the supply chain is used for planning. Hence, buyers have become more inclined to engage with a single vendor that provides an SCP suite that covers most, if not all, of their SCP technology needs.

The trend toward a unified platform continues, but we are again experiencing change. The focus from end-user organizations is shifting toward more flexibility and choice in planning, so that they are not locked into using only the capabilities of a single technology provider when these are not strong enough in certain areas. This shift is prompting vendors to open up their platforms to allow organizations to embed specific algorithms in them — or to source third-party algorithms, while focusing on governance, flexibility and a strong UX. It is still early in this regard, but this is the direction in which the SCP technology market is moving.

Recommendations

Supply chain technology leaders and SCP leaders looking to invest wisely in SCP technology should:

- Clarify their business strategy. What are the key factors to consider for the supply chain?
- Link the business strategy to the supply chain and SCP strategy. What does the SCP capability need to deliver to generate the required business value?
- Identify the current (“as is”) maturity level for the relevant SCP processes — for example, S&OP, demand planning and supply planning.
- Define the desired (“to be”) maturity level for the relevant SCP processes to support the business strategy. It can be helpful to phase the journey to the to-be state to allow sufficient time to stabilize the planning environment between the phases of the journey.

- Construct an overall SCP technology vision and roadmap with a view toward filling any gaps.
- Identify suitable technology options in support of current and future capability requirements. Use this Magic Quadrant and the associated **Critical Capabilities for Supply Chain Planning Solutions** when considering your options to support the SCP maturity journey. Ask Gartner analysts to guide you through the selection process.

Market Overview

The SCP market was worth \$7.6 billion in 2024 and is forecast by Gartner to exceed \$15.8 billion through 2029, resulting in a compound annual growth rate (CAGR) of almost 17% (in constant-currency terms). This market includes a large array of planning solutions, ranging from products that provide foundational planning capabilities to those that enable business differentiation and innovation.

SCP capabilities have been growing in importance to many companies during the past several years, as we continuously see more disruptions, uncertainties and variabilities affecting supply chains, and the market has continued to receive a great deal of focus and investment. The crowded SCP solution market includes everything from large, long-standing technology vendors to smaller, privately funded software vendors. Many of its more established vendors began as specialist providers focused on a few aspects of planning, such as inventory planning, production planning and scheduling, or S&OP. They have since extended their reach into multiple disciplines of SCP through in-house development or acquisitions.

New entrants typically come from the worlds of big data and AI, which mainly focus on short-term planning to fill use-case-specific gaps in incumbent SCP solutions and achieve a fast ROI. This is prompting traditional SCP solution providers to embed more advanced capabilities in their solutions, such as AI/ML, GenAI and agents, cognitive computing, and support for big data and simulations.

During the past few years, we are seeing more partnerships emerging, such as technology partnerships (to gain broader functional coverage), implementation partnerships (to gain implementation resources) or data partnerships (e.g., for retrieving external risk data). We have also seen more acquisitions taking place — usually with the purpose of expanding functional coverage for vendors.

This Magic Quadrant is a multiregional analysis oriented toward Gartner's clients in North America and Western Europe. The SCP solution vendors featured in this Magic Quadrant are evaluated, among other things, on their ability to sell to multinational organizations based in North America, Western Europe and beyond.

⊕ Evidence

Note 1: Vertical/Industry Strategy Criterion

The vertical/industry strategy criterion examines a vendor's strategy to direct resources, skills and offerings to meet the needs of individual vertical markets. Key for SCP solutions is a focus on three industry groups:

- Process manufacturing:
 - Consumer goods
 - Food and beverage
 - Pharmaceuticals
 - Paper and pulp
 - Oil and gas
 - Metals
 - Chemicals
- Discrete manufacturing:
 - Automotive
 - Industrial manufacturing
 - High-tech/electronics
 - Aerospace and defense
 - Mining and construction

- Medical devices
- Footwear/apparel
- Consumer durables
- Distribution-intensive:
 - Telco/utilities
 - Aftermarket
 - Retail
 - Retail (excluding grocery)
 - Wholesale/distribution

Note 2: SCP Configure, Optimize, Respond and Execute (CORE) Model

Gartner recognizes three major categories of planning functionality:

1. Some solutions can help to *configure* or design the supply chain (for example, in terms of an appropriate supply chain segmentation strategy or postponement strategy).
2. Some solutions can *optimize* the supply chain (for example, by helping to create an optimal plan using constrained resources).
3. Some solutions can find out how to *respond* when execution does not happen according to the optimal plan (for example, via customer order prioritization for Class A customers when a supply delivery is compromised). To respond effectively, an SCP solution must also be able to see what is happening in terms of near-real-time execution.

Gartner's CORE model takes its name from those three major categories and from the requirement for execution visibility:

- **C = Configure:** Decide the configuration or design of the supply chain to achieve the company's goals by enabling the supply chain strategy.
- **O = Optimize:** Create optimal demand and supply plans, taking account of any constrained resources.

- **R = Respond:** Create intelligent responses to execution events that keep the short-term plan as close as possible to what is needed to achieve the company's goals.
- **E = Execution Visibility:** Ensure that the planning capability has the right level of visibility into relevant demand- and supply-side execution events, covering both internal and external data sources.

Traditional planning solutions tend to focus strongly on the “optimize” category. However, a company will need to rebalance its planning capabilities more evenly across all the categories. Therefore, it is important — particularly when thinking about future SCP requirements — to consider this rebalancing in any technology-related roadmaps.

(For further information on the CORE model, see [Getting Ready for the Digital Future: Strengthen Your Supply Chain Planning CORE.](#))

⊕ Evaluation Criteria Definitions

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