

Magic Quadrant for Supply Chain Planning Solutions: Process Industries

18 March 2026 - ID G00840115 - 59 min read

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To thrive in today's dynamic market, process industry companies need advanced supply chain planning technology for greater agility and responsiveness. This Magic Quadrant helps leaders identify and implement top SCP solutions to drive strategic and operational success.

Market Definition/Description

Gartner defines supply chain planning (SCP) solutions as platforms that provide technological support to help companies manage, link, align and share planning data across an extended supply chain. SCP solutions support a wide range of planning activities, from demand planning and detailed supply planning, to strategic and execution-level planning. They establish a single version of the truth for planning data and decisions, regardless of the underlying execution technology environment.

Organizations use SCP solutions to enhance the quality and efficiency of their supply chain planning decisions and to achieve higher levels of maturity. These solutions enable and streamline planning decision making by providing access to planning data, applying advanced analytics, business rules and prioritization logic, and enforcing process governance across the planning cycle. When utilized optimally, the result is improved end-to-end supply chain planning decisions, including strategic priorities aligned with resource allocations to drive improved business outcomes.

Some of the common business problems that SCP solutions are designed to address include:

- **Aligning plans end to end** — This involves creating plans that are aligned and feasible across all tiers of the supply chain, from suppliers to customers and further tiers out. It also focuses on connecting plans 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, partners and key metrics used for decision making. By having information readily available, organizations are better equipped to assess situations and deliver actionable insights based on data. Users can then 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 in supply chain operations. Strong technology support and process automation enable greater efficiency and reduce human bias in decision making. The collaboration capabilities of SCP solutions allow planners and partners to work together directly on the platform, increasing confidence in both the inputs and outputs used to make decisions.

Mandatory Features

- Demand planning, such as demand forecasting and consensus demand planning.
- Supply chain 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, such as machine learning and predictive/prescriptive analytics to enhance forecast accuracy, detect anomalies and optimize planning decisions.

- Digital supply chain twin — creating a real-time, virtual representation of the end-to-end supply chain to simulate scenarios and assess impacts before execution.
- Supply chain design, modeling and segmentation to support network optimization, segmentation strategies and network modeling to align supply chain structure with business goals.
- Continuous planning to enable dynamic, always-on planning cycles that adapt to real-time changes in demand, supply and business constraints.
- Multienterprise planning to facilitate synchronized planning across internal teams and external partners, ensuring visibility and collaboration across the extended supply network.

Magic Quadrant

Figure 1: Magic Quadrant for Supply Chain Planning Solutions: Process industries





Gartner.

Vendor Strengths and Cautions

AIMMS

AIMMS is a Niche Player in this Magic Quadrant. Its SC Navigator platform is mainly focused on supply chain network design and tactical optimization with out-of-the-box capabilities while its Optimization Tooling offers customizable solutions for more complex planning needs. AIMMS operates globally, with its strongest presence in Europe and North America focusing on large enterprises across industries such as oil and gas, food and beverage, and chemicals. AIMMS is investing in AI-driven capabilities, including AI companions, to enhance explainability and productivity.

Strengths

- **SCP priority:** AIMMS' exclusive focus on SCP enables it to deliver specialized solutions tailored to solve specific customer requirements, ensuring that product enhancements are closely aligned with evolving supply chain needs.
- **Price flexibility:** AIMMS offers flexible and competitive pricing models for its SC Navigator and Optimization Technology (OT) solutions, enabling organizations to align licensing with their specific usage patterns and functional needs. Customers can choose between user-based modular licensing or usage-based models, supporting scalability and cost-efficiency for both out-of-the-box and customized applications.
- **Vendor implementation services:** AIMMS shows a healthy growth in its implementation services, outpacing its customer growth rate. This reflects its increasing capacity to support clients through deployment and solution adoption.

Cautions

- **Data management:** AIMMS' current data management capabilities are relatively basic, offering standard data templates, validation and infeasibility analysis, but advanced data cleansing, enrichment or automated correction features are limited. While the vendor's roadmap includes plans to leverage GenAI for improved data handling, details on execution and timelines remain limited, which may impact organizations with complex or large-scale data integration requirements.
- **Customer diversity:** AIMMS' customer base is concentrated among very large enterprises, with the majority of deployments in the food and beverage, oil and gas, and chemicals sectors. Organizations outside these core industries or with different scaling requirements may find fewer peer references and less tailored best-practice support.
- **Capability coverage:** Although AIMMS supports a wide range of planning use cases, its native, out-of-the-box functional capabilities are less comprehensive than those of many vendors in this Magic Quadrant. Achieving full functionality in several areas often requires significant configuration or customization, which may increase implementation complexity and time to value for clients.

Anaplan

Anaplan is a Challenger in this Magic Quadrant. Anaplan's cloud-native Connected Planning Platform delivers capabilities across demand planning, supply planning, sales and

operations (S&OP), and procurement planning. Anaplan also has deep expertise in finance, sales, and workforce planning. Anaplan's solution is designed to facilitate extended planning and analysis (xP&A) by tightly integrating operational and financial planning processes. The vendor maintains a strong presence in North America, Western Europe, and the Asia/Pacific region, serving a diverse client base that spans midsize to large enterprises across multiple industries within discrete and process manufacturing. Anaplan continues to invest in artificial intelligence (AI) and advanced analytics from natively developed capabilities like Anaplan Forecaster, as well as acquired machine learning (ML) and demand planning capabilities from its acquisition of Syrup Tech in September 2025.

Strengths

- **User experience:** Anaplan's vision for user experience is strong when compared to other vendors in this Magic Quadrant. It is supported by a clean, modern, configurable role-based user interface, explainability and guidance supported by GenAI functionality, and enablement of collaboration across business functions.
- **Platform extensibility:** Anaplan distinguishes itself in the market with a highly extensible platform, enabled by an open and modular architecture. Its unified environment supports no-code/low-code configuration, allowing for rapid customization. Developers and partners can leverage the Anaplan Application Framework to build extensions, connectors and custom applications, further enriching the platform's capabilities.
- **Customer enablement:** Anaplan excels in engaging with its customer base, leveraging customer advisory boards. It offers a number of certification options and an array of training options, enabling customers to be self-sufficient.

Cautions

- **Digital supply chain twin modeling:** While Anaplan supports real-time constraint modeling, users need to leverage integrated AI tools for predictive outcomes. Anaplan continues to invest in automation of model maintenance via its data orchestration layer to further reduce manual intervention.
- **Industry templates:** Anaplan's strategy places less emphasis on delivering prescriptive, industry-specific best-practice templates than some other vendors in this Magic Quadrant. While Anaplan's configurable applications and partner ecosystem have helped improve overall implementation timelines, customers may still need to rely on configuration or partner-led extensions to achieve industry-tailored functionality.

- **Pricing level and transparency:** Anaplan's pricing transparency is lower, and its price level higher, when compared to other vendors in this Magic Quadrant. While recent efforts to simplify the pricing model may improve clarity over time, customers may still experience higher license fees.

Aptean (Logility)

Aptean (Logility) is a Leader in this Magic Quadrant. Its Logility Decision Intelligence Platform delivers end-to-end SCP capabilities, including IBP, S&OP, network design and optimization, demand and supply planning, and detailed scheduling. Logility's customers are found in a variety of discrete and process manufacturing industries. The company maintains a global operational base, with the majority of its workforce and sales presence in North America and Western Europe. Recent innovations include Intelligent Order Response, continuous network optimization, AppCentral 2.0, agent-based automation and Aptean's acquisition of Germanedge for production scheduling. Logility was acquired by Aptean in April 2025.

Strengths

- **AI and analytics:** When compared to other vendors in this Magic Quadrant, Logility has a strong vision for AI and analytics, leveraging techniques including ML, deep learning, simulation and agent-based automation. Customers benefit from scenario-driven planning, explainable recommendations and adaptive forecasting that improve decision quality and supply chain agility.
- **Planning decision automation:** When compared to other vendors in this Magic Quadrant, Logility has a strong vision for decision automation, with embedded AI supporting automation across demand, inventory, supply and network planning. Configurable automation thresholds, continuous network optimization and evolving agent-based features help streamline routine planning tasks and improve responsiveness.
- **Customer experience:** Logility demonstrates a strong commitment to customer service with quarterly customer councils, extensive training and certification programs, and fee-based postimplementation support. Issue resolution times for critical incidents are quicker than others in this Magic Quadrant, while their customers report high satisfaction with service responsiveness and contract negotiations.

Cautions

- **Industry templates:** Compared to other vendors in this Magic Quadrant, Logility lacks industry-specific planning templates, instead offering a library of general business process models and ERP integration templates. This may require customers to invest additional time and resources in creating best-practice process templates.
- **Platform complexity:** Logility's platform comprises a broad set of modules, some with overlapping functionality due to recent acquisitions such as Germanedge. This complexity can create integration and consistency challenges for customers.
- **Tendency to be used on an enterprise level:** Despite Logility's positioning as an end-to-end SCP platform, many customers deploy only select modules rather than the full set of capabilities, particularly outside North America and Western Europe. This pattern may limit the realization of enterprisewide value for organizations seeking a fully integrated SCP solution.

Arkieva

Arkieva is a Challenger in this Magic Quadrant. Its Arkieva Enterprise platform is mainly focused on process industries, providing scenario-driven planning and integrated scheduling to address volatility and complexity. Its operations are mainly focused in North America, Western Europe and the Asia/Pacific region (excluding Japan), especially serving midmarket enterprises in capacity-constrained, high-material-cost environments. Arkieva is investing in agent-driven workflows to enhance decision guidance and further bridge the gap between planning and execution.

Strengths

- **Industry-specific investments:** Arkieva offers a strong industry-specific roadmap for process industries, highlighted by recent additions like contract and blending optimization tailored to complex procurement and manufacturing needs. Ongoing enhancements, including advanced campaign planning, sustainability metrics and upcoming cluster-based demand forecasting, underscore its commitment to meeting the evolving requirements of process manufacturers.
- **Pricing:** Arkieva's subscription-based pricing model is competitive, with fees scaled by customer revenue tiers, modules and users. Clients can start with individual modules and expand over time, while user-based pricing ensures alignment with organizational scale. GenAI functionality is currently embedded at no additional cost, although Arkieva anticipates introducing separate pricing as adoption and use cases expand in the future.

- **Technical support:** Arkieva provides 24/7 technical support through offices in North America, Europe and Asia, ensuring continuous assistance for clients worldwide. Its help desk offers multilingual support, including English, Mandarin, German, Spanish, French, Arabic and Japanese, with additional languages such as Dutch and Hindi, enhancing accessibility and responsiveness across customers.

Cautions

- **Geographic strategy:** Arkieva's geographic strategy is heavily weighted toward North America and Western Europe, with limited direct physical presence and partner coverage in other regions such as Latin America and the Middle East. Organizations outside its core markets may encounter fewer local resources.
- **Industry coverage and growth:** Arkieva's customer growth is concentrated in its core industry verticals of oil and gas, chemicals, and food and beverage, with limited expansion into other process industry verticals. Organizations outside these primary industries may find fewer peer references and less proven expertise for their specific requirements.
- **Customer awareness:** Arkieva has relatively low customer awareness in the market, as evidenced by limited mentions in client inquiries and general searches. Furthermore, it is less frequently considered as an alternative during vendor selection processes, which may impact its visibility among prospective buyers.

Aspen Technology

Aspen Technology is a Niche Player in this Magic Quadrant. Its suite of SCP solutions is primarily focused on the specialty chemicals and select consumer packaged goods industry verticals. AspenTech operates globally, serving enterprises with complex process operations and integrated manufacturing environments. The vendor is investing in expanding synergies between process simulation, MES and scheduling, as well as advancing sustainability modeling to support evolving industry requirements and end-to-end supply chain visibility.

Aspen Technology did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Capability coverage:** AspenTech offers end-to-end planning coverage, spanning network modeling, demand planning and detailed scheduling. Its broad platform enables

alignment between strategic, tactical and operational decisions, supported by real-time data integration from MES and process control systems to facilitate responsive, data-driven planning across the supply chain.

- **Industry expertise:** AspenTech demonstrates deep industry expertise, particularly in process manufacturing industries such as chemicals, leveraging decades of domain knowledge to deliver specialized planning, scheduling and optimization solutions. Its product portfolio is tailored to address the unique operational and regulatory requirements of these industry verticals, supporting complex workflows.
- **Customer enablement:** AspenTech provides a strong customer enablement program, including standardized training, certifications, advisory boards and formal postimplementation support. These resources help clients accelerate adoption and maximize solution value, particularly in complex process industry environments.

Cautions

- **Decision-centric planning:** AspenTech's decision-centric planning vision is limited. It does not provide a decision-oriented impact framework and, while collaboration features are present, there is no support for automatic planning process composition or learning-driven process suggestions, which may restrict advanced decision support and process agility.
- **Customer awareness:** AspenTech has relatively low customer awareness in the broader SCP market, as indicated by infrequent mentions in Gartner client inquiries and limited visibility in vendor selection processes. This may reduce its consideration and perceived credibility as an alternative among prospective buyers, especially outside its more narrow scope of focus industries.
- **Strategy for upgrades:** AspenTech's upgrade strategy features a release cadence of approximately every six months, with multiyear support for previous versions allowing customers flexibility in when to upgrade. However, upgrades may require user-driven testing and model validation, particularly for customizations. This can introduce additional effort and planning for customers managing complex deployments.

Blue Yonder

Blue Yonder is a Visionary in this Magic Quadrant. Its suite of planning applications, with Cognitive Planning as the main component, delivers end-to-end multienterprise planning

capabilities to support complex supply chain environments. Blue Yonder's operations are geographically diverse, with a primary focus on North America, Western Europe, and the Asia/Pacific region (excluding Japan), and its client base consists mainly of large enterprises across a variety of industries. The company's ongoing investments are aimed at enhancing platform scalability and advanced capabilities to support trends such as agentic AI and autonomous planning. In addition, Blue Yonder's 2024 acquisitions of One Network Enterprises and flexis expand its ecosystem visibility and production scheduling capabilities within automotive.

Strengths

- **Decision automation:** Blue Yonder's platform automates planning tasks across strategic, tactical and operational levels using ML, optimization engines and intelligent agents. End users will benefit from automated scenario generation, exception handling and dynamic workflows.
- **Speed and scalability:** Blue Yonder's vision for speed and scalability is strong compared to other vendors in this Magic Quadrant. Its distributed in-memory architecture enables real-time scenario analysis and rapid, efficient plan recalculation, including incremental optimization of affected network segments.
- **Breadth of coverage:** Blue Yonder offers one of the most comprehensive portfolios in this Magic Quadrant, with native and acquired solutions spanning all planning layers, enabling end-to-end SCP for complex, global organizations.

Cautions

- **Platform complexity:** Blue Yonder's portfolio comprises multiple acquired products and applications, resulting in a complex landscape for customers to navigate. While the Cognitive Planning platform aims to unify capabilities and is transitioning them, some areas, such as scheduling and supplier collaboration, remain largely outside the core platform, with a roadmap to transition. Deployment options, user experience and integration approaches vary across products, which may require additional effort for overall harmonization.
- **Pricing:** Blue Yonder has taken steps to simplify its pricing structure. However, Gartner data indicates that the model remains less transparent than some competitors. Additionally, the total subscription price remains among the highest in this Magic Quadrant.

- **Data management strategy:** Blue Yonder provides robust data validation and anomaly detection through configurable business rules and validation processes. However, data correction tools prioritize governance by customers, requiring them to carefully configure guardrails for automatic updates from system alerts.

Coupa

Coupa is a Niche Player in this Magic Quadrant. Its Supply Chain Design & Planning solution is broadly focused on strategic network design, S&OP and procurement. Its operations are geographically diversified, serving large enterprises and a wide range of industries. The vendor is investing in autonomous, AI-driven decision orchestration, industry-specific blueprints and ESG capabilities to enable continuous supply chain optimization.

Strengths

- **Solution flexibility:** Coupa's platform delivers flexibility through a microservices architecture, low- and no-code extensibility, and a marketplace for third-party apps. This approach allows clients to tailor and extend SCP capabilities to fit evolving business needs.
- **Customer sentiment:** Coupa receives a positive reputation among its customer base, with users frequently citing high satisfaction across service, support and ease of engagement. Many organizations express confidence in the platform's value and indicate a strong willingness to recommend Coupa to others.
- **Customer engagement and enablement:** Coupa actively promotes customer engagement through annual user conferences in North America and Europe, complemented by quarterly advisory board meetings across regions. Ongoing support is provided via newsletters, webinars and white papers, while the Coupa University training and certification program offers both online and in-person courses, ensuring customers have a broad choice for skills development and renewal.

Cautions

- **Industry template strategy:** Coupa's industry-specific templates are limited in both number and functional scope, with no clear vision for broader expansion. While the platform offers a variety of layered templates and configurable building blocks, organizations seeking deep, ready-made industry solutions may find the available options insufficient for specialized requirements.

- **Functional coverage:** Coupa's strengths lie in supply network design and aggregated planning, but its coverage of detailed and operational planning is limited. The platform lacks native capabilities for areas such as detailed scheduling and order promising, which restricts its ability to support end-to-end, decision-centric processes and may limit value for organizations seeking comprehensive SCP solutions.
- **Priority on SCP:** Supply chain planning is one of several focus areas within Coupa's broader platform, which also emphasizes procurement, spend management and treasury management. As a result, SCP shares strategic focus and investment with other areas of the Coupa platform, which may influence the pace of innovation and the breadth of functionality available to SCP customers.

Dassault Systèmes

Dassault Systèmes is a Visionary in this Magic Quadrant. Its DELMIA solutions, powered by the 3DEXPERIENCE platform, are broadly focused on connecting engineering, manufacturing and SCP through a unified environment. Dassault Systèmes operates globally, serving large enterprises across multiple industries within discrete and process manufacturing. The vendor is investing in industrial AI and virtual twin technology extending across industry ecosystems to enable sustainable and continuously adaptive supply chain networks.

Strengths

- **Planning decision alignment:** Dassault Systèmes delivers strong planning decision alignment by supporting all planning horizons, from network design to detailed scheduling, within its DELMIA Quintiq and 3DEXPERIENCE platform. The solution is ERP-agnostic, integrates with a broad range of external systems and leverages real-time data feeds to keep its virtual twins current.
- **Global reach:** Dassault Systèmes demonstrates significant global reach. Its extensive international presence and robust partner ecosystem enable consistent deployment, support and innovation for complex, multisite SCP initiatives worldwide.
- **Overall viability:** Dassault Systèmes exhibits strong overall viability, underpinned by solid financial performance and high employee satisfaction. This enables sustained innovation and reliable service delivery, reinforcing the company's long-term commitment to its customers.

Cautions

- **Decision-centric planning:** Dassault Systèmes' DELMIA solutions support event-driven planning by integrating real-time data, detecting disruptions and enabling reoptimization through virtual twins and predictive analytics. However, its broader vision for decision-centric planning is still evolving, particularly in embedding broader ecosystem signals and fully composable process workflows.
- **Pricing:** Dassault Systèmes' pricing is generally at a premium compared to peers, and the flexibility of its pricing model can introduce complexity — particularly for broad or highly customized deployments, where total cost of ownership may be difficult to estimate early in the process. Prospective customers should engage with Dassault Systèmes to clarify pricing specific to their requirements.
- **Issue resolution times:** Dassault Systèmes provides clear priorities and response times for support requests, but guaranteed resolution timelines are generally limited to urgent issues and select DELMIA Quintiq contract tiers. For nonurgent cases, resolution times may not be provided and the vendor encourages customers to use the self-service 3DEXPERIENCE platform knowledge base, which can impact expectations for timely problem resolutions for nonurgent issues.

Infor

Infor is a Niche Player in this Magic Quadrant. Its solution, Infor Supply Chain Planning (SCP), is broadly focused on delivering end-to-end SCP capabilities with strong industry expertise in process manufacturing verticals such as consumer products, food and beverage, and chemicals. Infor operates globally, with its highest focus on North America and Europe, serving midmarket and larger enterprises with solutions going beyond SCP, such as ERP, WMS and TMS. The vendor is investing in AI-driven autonomous planning and real-time data insights, while continuously enhancing vertical-specific capabilities to better support industry requirements and evolving customer needs.

Strengths

- **Industry-specific roadmaps:** Infor demonstrates a strong vertical-specific roadmap, consistently delivering targeted enhancements, especially for process verticals. Recent and planned updates include tank scheduling optimization for chemicals and food and beverage, advanced root cause analysis, scenario management with financial and sustainability modeling, and embedded integration with Infor CloudSuites.

- **Global reach:** With offices worldwide, Infor demonstrates significant global reach. Its broad international footprint and established partner ecosystem provide customers with consistent deployment and support for SCP initiatives across regions.
- **Technical support:** Infor provides comprehensive technical support for its SCP products, with a broad set of languages available in the solution and standard support available regionally during business hours and options for extended or 24/7 coverage. The help desk offers multilingual assistance in a wide range of languages.

Cautions

- **AI strategy:** Advanced AI techniques such as unsupervised and reinforcement ML, deep learning, simulation, and experiment-based planning are not deployed in Infor's core SCP solution. While the roadmap indicates future expansion, Infor's AI strategy is not fully comprehensive or AI-first compared to other vendors in this Magic Quadrant.
- **Decision-centric planning:** Infor's decision-centric planning relies largely on manual modeling of priorities and rule-based workflows, with limited automation and no defined impact framework or comprehensive support for automated, event-driven decision making. While the vision includes more adaptive, agentic workflows, current capabilities are basic and details on achieving this transition are limited.
- **Platform complexity:** To support the broad scope of SCP, Infor makes use of multiple solutions with different deployment options and some capabilities overlap between solutions. This increases the complexity of the overall solution landscape, which can pose challenges and confuse customers.

John Galt Solutions

John Galt Solutions is a Visionary in this Magic Quadrant. Its Atlas Planning Platform is broadly focused on delivering SCP capabilities to support decision making from demand and S&OP to production planning. John Galt Solutions operates with a geographically diverse footprint, particularly in North America, Western Europe and the Asia/Pacific region, serving primarily midsize organizations and large enterprises across a wide range of industries. The vendor continues investing in AI, decision intelligence and sustainability-driven planning to help customers accelerate digital transformation and adapt to evolving market demands.

Strengths

- **Vision for decision automation:** John Galt Solutions has a strong vision for decision automation, focusing on no-code/low-code tools, intelligent workflows and AI-driven analytics. This approach supports automation across several types of planning decisions, helping organizations accelerate decision making, reduce bias and enhance agility.
- **Platform simplicity:** John Galt Solutions offers a straightforward platform with several applications across areas such as demand planning, supply planning, inventory optimization and S&OP that use the same underlying platform and data model. Its harmonized architecture makes it easy for customers to navigate its platform portfolio.
- **Customer experience:** John Galt Solutions is recognized for strong customer satisfaction, particularly in areas such as service, support, and the evaluation and contracting process. Clients also report a high willingness to recommend the solution, resulting in an overall customer experience that exceeds industry averages.

Cautions

- **Global coverage:** John Galt Solutions' global coverage is limited compared to larger competitors, with the majority of direct staff and resources concentrated in North America, Western and Eastern Europe, and select Asia/Pacific markets such as Japan. In other regions, such as Sub-Saharan Africa, the Middle East and North Africa, the company relies more heavily on partners. This may impact the consistency of implementation.
- **End-to-end functional coverage:** The Atlas Planning Platform offers narrower native functional coverage compared to some other vendors in this Magic Quadrant. To address gaps in areas such as network design and detailed scheduling, John Galt Solutions relies on strategic partnerships, making customers dependent on third-party providers for a fully comprehensive solution. This reliance may impact integration, support and overall solution cohesion for organizations seeking a single-vendor approach.
- **Support hours and languages:** John Galt's help desk operates 24 hours a day Monday through Friday, with 24/7 support available for an additional fee through its Premium Support offering. The help desk supports a limited range of languages and, while users can select different languages within the solution, some interface elements, such as help functions and tables, default to English.

Kinaxis

Kinaxis is a Leader in this Magic Quadrant. Its Maestro platform is focused on end-to-end concurrent SCP covering S&OP, demand, supply, inventory, production planning and scheduling. Kinaxis operates globally, with its largest footprint in North America, Western Europe and the Asia/Pacific region, serving primarily midsize to large enterprises across discrete and process manufacturing. The vendor continues to invest in Maestro's capabilities to orchestrate enterprisewide planning and agentic AI frameworks, integrating financial metrics, risk, sustainability and operations.

Strengths

- **Vision for user experience:** Kinaxis Maestro delivers a modern, intuitive user experience with an emphasis on explainability, natural language interaction and guided workflows. The platform incorporates generative AI and conversational agents to help users understand, navigate and adopt new features and drive improved decision making, while embedded onboarding tools and in-app guidance support continuous learning. The company's focus on usability and transparency helps drive engagement and collaboration across planning roles.
- **Partnership ecosystem:** Kinaxis has established a broad partner ecosystem, with numerous distribution and certified implementation partners across all major regions. Many customer deployments are delivered in collaboration with these partners, enabling Kinaxis to scale implementations globally and provide localized expertise and support for diverse customer needs.
- **Overall viability:** Kinaxis demonstrates strong overall viability, supported by solid financial performance, high employee satisfaction and a balanced customer base spanning various geographies and company sizes. This foundation underpins the company's dedication and long-term commitment to the SCP market.

Cautions

- **Customer sentiment:** Kinaxis receives below-average customer sentiment in areas such as service, support, and the evaluation and contracting process. Additionally, clients report a lower willingness to recommend the solution compared to peers, which may impact overall satisfaction and long-term customer advocacy. However, Kinaxis has made significant recent investments in customer success and support.
- **Pricing:** Kinaxis is positioned at the higher end of the market in terms of pricing, with a model that varies based on company size and includes multiple factors such as user

counts and applications licensed. While Kinaxis offers some transparency into the pricing elements, the complexity and variability of the pricing structure may make it challenging for organizations to estimate and compare options.

- **R&D investment:** The company's investment in research and development is lower compared to peers. This may affect the pace of innovation and the speed at which new capabilities and enhancements are introduced. However, Kinaxis continues to release new or enhanced functionality on a monthly cadence.

o9 Solutions

o9 Solutions is a Leader in this Magic Quadrant. The o9 Digital Brain platform delivers comprehensive SCP capabilities, including demand forecasting, supply response modeling, scenario management and integrated business planning. Its customer base is concentrated among large enterprises, with the strongest presence in food and beverage and consumer products. o9 Solutions maintains a significant presence in North America, Western Europe and the Asia/Pacific region (including Japan), with a growing footprint in Latin America. Recent enhancements include touchless planning, agentic AI-driven analytics, advanced MRP, campaign planning optimization and sustainability dashboards.

Strengths

- **Industry roadmap/templates:** o9 Solutions' support for tailored industry capabilities and templates is strong. The company delivers frequent enhancements for process verticals such as consumer products and food and beverage, and continues to broaden its offerings for process industries.
- **Composability:** When compared to other vendors in this Magic Quadrant, o9 Solutions demonstrates strong composability through its API-first, microservices-based architecture and extensible platform. Customers benefit from self-service configuration, no-code/low-code tools and a plug-in framework that supports integration with external algorithms and applications.
- **Platform simplicity:** Unlike many vendors in this Magic Quadrant, o9 Solutions delivers nearly all its SCP capabilities natively on a unified platform, minimizing integration challenges and supporting a seamless user experience across functional areas. The platform's architecture enables consistent deployment and upgrades, with only limited reliance on external partnerships, such as MangoGem for advanced scheduling.

Cautions

- **Pricing:** Relative to other vendors in this Magic Quadrant, o9 Solutions' pricing model is less transparent and tends to be above average in annual subscription costs. Pricing is based on the number of decision blocks, business size and other components for certain modules, which may require customers to invest additional time in understanding and achieving transparency in how to scale costwise with the solution.
- **Data management:** o9 Solutions provides tools for data ingestion, harmonization and semantic modeling of structured and unstructured data. While AI-assisted mapping and profiling are available, most data governance and cleansing activities still require customer involvement.
- **Vendor implementation services:** o9 Solutions' growth in consulting and implementation resources has not kept pace with its expanding customer base. Organizations may experience challenges in securing sufficient vendor-led support during deployment, particularly as new customer growth outpaces investment in implementation capacity. This may increase reliance on third-party partners or internal resources.

OMP

OMP is a Leader in this Magic Quadrant. Its Unison Planning platform is focused on delivering end-to-end SCP capabilities ranging from network design to detailed scheduling, leveraging its deep process industry expertise. OMP operates globally, serving large enterprises across complex verticals such as consumer goods, chemicals, metals and life sciences. The company is investing in agentic AI and an open, connected ecosystem, co-innovating with customers and partners to drive supply chain agility and resilience.

Strengths

- **Planning decision alignment:** OMP's Unison Planning delivers comprehensive planning decision alignment across all layers of planning decisions, from strategic network design and demand planning to detailed scheduling. The platform's unified, end-to-end data model enables seamless integration with multiple data sources ensuring harmonized, aligned and data-driven decision making throughout the full planning process.
- **Digital supply chain twin:** OMP's digital supply chain twin provides a comprehensive, real-time representation of the entire supply chain at a granular level. The platform supports automatic creation and maintenance of the end-to-end digital twin, leveraging probabilistic methods to account for variability within the models.

- **Customer diversity:** While primarily serving large enterprises, OMP demonstrates strong customer coverage by maintaining a broad and diverse customer base across all major process manufacturing verticals. This wide industry reach highlights OMP's ability to address complex requirements and deliver value to leading organizations in verticals such as consumer products, chemicals, pharmaceuticals, food and beverage, paper and pulp, and metals.

Cautions

- **Geographical strategy:** While having a high degree of in-house implementation services and investing in an ecosystem of business alliances, OMP still has slightly fewer distribution and implementation partners compared to peers, which means it relies more on its own sales and implementation teams. Combined with lower coverage of offices across regions, this contributes to a below-average score for geographic strategy.
- **Technical support:** OMP's technical support is structured around regional help desks operating during local business hours, with 24/5 and 24/7 support available only as optional, premium services. Language support is limited, with several major languages not covered. Organizations requiring round-the-clock support or assistance in languages beyond English, Mandarin, German, French, Spanish, Russian, Dutch, Portuguese and Hindi may find coverage less comprehensive than some competitors.
- **Strategy for upgrades:** OMP's upgrade strategy is shifting toward continuous updates through its Accelerate program, but not all customers are yet on this model. Backward compatibility for new features is limited to three to four releases, depending on the functionality. This may result in inconsistent feature availability.

Oracle

Oracle is a Leader in this Magic Quadrant. The Oracle Fusion Cloud Supply Chain Planning suite delivers a unified, cloud-native platform supporting demand management, supply and inventory planning, S&OP, and production scheduling. Oracle's primary industry focus is very broad, including many verticals in discrete and process manufacturing industries. The solution is predominantly adopted by large and upper midmarket enterprises, with its SCP customer base mostly concentrated in North America and further presence in Latin America, Western Europe, the Middle East and North Africa, and the Asia/Pacific region. Recent enhancements emphasize GenAI-powered decision intelligence, autonomous planning

agents and continued investments in the Redwood user experience to streamline the user interface across applications.

Strengths

- **AI and analytics:** Oracle's vision for AI and analytics is stronger compared to other vendors in this Magic Quadrant. The platform leverages supervised and unsupervised ML, deep learning, simulation, and other advanced analytics. GenAI-powered capabilities produce natural language insights into planning models. Autonomous agents, developed through Oracle's Fusion AI Agent Studio, further support exception analysis and data quality assessment.
- **Digital supply chain twin strategy:** When compared to other vendors in this Magic Quadrant, Oracle offers a robust foundation for digital supply chain twin enablement by modeling a comprehensive range of constraints within its native planning environment. The platform supports dynamic, time-phased pegging, enabling planners to trace and synchronize decisions across the network.
- **Customer sentiment:** Many of Oracle's customers report high satisfaction with areas such as customer service, support, evaluation and contract negotiation. This is further reflected by a strong customer recommendation rate.

Cautions

- **Platform complexity:** Not all planning capabilities reside within Oracle Fusion Cloud Supply Chain Planning; some functions may require use of analytics or other modules across the broader Oracle Fusion Cloud suite. Customers may encounter complexity when navigating product selection, integration and deployment.
- **Customer enablement:** Postimplementation support for tracking user adoption relies primarily on self-service tools and community forums, with limited in-platform metrics to monitor feature utilization. Enablement events and conferences typically address the broader Oracle portfolio rather than focusing specifically on SCP.
- **Data management:** Oracle's approach to data management in SCP is primarily rule-based, relying on governed ingestion, validation and correction workflows. While the platform supports scheduled and incremental data loads, REST APIs, and file-based imports, advanced autonomous data management capabilities, such as automated cleansing, enrichment and synthetic data generation, are limited.

QAD

QAD is a Niche Player in this Magic Quadrant. Its QAD Digital Supply Chain Planning suite is mainly focused on providing end-to-end planning capabilities across demand planning, distribution planning, procurement planning, and production planning and scheduling across various process manufacturing verticals. Its operations are geographically diversified, with clients typically in the midmarket and upper-midsize manufacturing segments, and it offers solutions beyond SCP such as ERP, workforce collaboration and procurement. QAD is investing in productivity and optimization AI agents to improve demand forecasting and scenario modeling, automating planning processes with real-time IoT integration and expanding industry-specific capabilities for manufacturing industries.

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

Strengths

- **Marketing mind share:** QAD demonstrates solid marketing mind share in SCP through frequent press releases, webinars and video content that highlight its solution innovations and customer achievements. The company regularly publishes SCP case studies that showcase tangible business outcomes for manufacturers, and conducts ongoing webinars and multimedia campaigns.
- **Pricing:** QAD offers competitive pricing for its SCP solutions, with a transparent subscription-based model based on licensed modules and users that provides clear cost predictability for customers.
- **Platform simplicity:** QAD's SCP platform emphasizes simplicity and ease of use, driven by the integration of DynaSys' planning capabilities and the 2024 acquisition of Phenix Software for advanced scheduling. The solution is designed to facilitate user adoption and streamline planning and scheduling processes, particularly for midmarket manufacturers.

Cautions

- **Breadth of coverage:** QAD's SCP has more narrow support of planning capabilities compared to other vendors in this Magic Quadrant in areas such as network design. QAD also lacks recently published partnerships for risk management and external data integration related to SCP.

- **AI and analytics:** QAD offers some basic AI and analytics features and some advanced AI features, including its newly released Champion AI, but lacks evidence of deep learning, reinforcement learning and a public, comprehensive AI-first roadmap across all planning functions. This level of AI and analytics may not meet the needs of organizations seeking the most advanced, unified AI capabilities in SCP.
- **Customer awareness:** Despite being a recognized provider of several types of solutions (such as ERP and workforce collaboration), QAD has limited visibility among the broader SCP customer base, with less frequent inclusion on vendor longlists and shortlists. This may be a result of QAD's targeted expansion strategy focusing on existing QAD customers adopting broader capabilities, while maintaining a strong focus on the midmarket segment. In addition, the vendor has chosen very select geographies, such as France, with ongoing efforts to expand in niche markets in the U.S.

RELEX

RELEX is a Visionary in this Magic Quadrant. Its RELEX Retail & Supply Chain Planning platform offers a unified SCP platform with capabilities across demand planning, supply planning, S&OP and detailed scheduling. It operates globally, with its largest footprint in Europe, while continuing to expand and grow in North America. It serves small to large enterprises in primarily retail and distribution-intensive verticals, but also has a strong and growing customer base in process manufacturing companies in consumer products and food and beverage, in particular. The company is investing in agentic AI and autonomous planning, while continuing to expand its capabilities through both innovation and strategic acquisitions.

Strengths

- **Strategy for speed and scalability:** RELEX demonstrates a strong strategy for speed and scalability, leveraging in-memory computing, parallel processing and incremental updates to deliver rapid scenario and plan calculations, even for very large data models. The platform's architecture enables users to run unlimited, on-demand scenarios with minimal latency.
- **Partnerships/ecosystem:** RELEX has a well-developed global partner ecosystem. Many projects are executed jointly with or entirely by partners that receive advanced training and certification. Strategic alliances with leading system integrators and technology partners enable RELEX to scale delivery, accelerate geographic expansion, and serve complex retail and manufacturing clients with local expertise.

- **Technical support:** RELEX offers robust technical support with flexible service levels tailored to customer needs, including the option for 24/7 coverage. Support is accessible via phone, email and an end-user portal, and is available in a wide range of languages to accommodate global customers.

Cautions

- **Industry focus:** RELEX's industry strategy in process manufacturing is narrowly focused, with primary industry templates, customer references and roadmap investments centered on consumer packaged goods and food and beverage. Adoption by other process manufacturing sectors, such as chemicals, metals and pharmaceuticals, remains limited.
- **Customer enablement:** RELEX currently has no formal training certification program available for customers. Additionally, RELEX's consultancy services are closely tied to its software solution and it does not provide general business consultancy independently, instead relying on partners for broader strategy and change management support.
- **Pricing:** RELEX's pricing is determined by the breadth of functionality implemented, as well as the size and complexity of each customer's business. However, because the criteria for assessing complexity can differ depending on the customer's specific environment, the pricing model has lower transparency. Additionally, RELEX's solution is typically higher than average compared to other vendors in this Magic Quadrant.

SAP

SAP is a Challenger in this Magic Quadrant. Its SAP Integrated Business Planning (IBP) platform is broadly focused on enabling end-to-end SCP and decision making across areas such as demand planning, S&OP and inventory optimization for a wide variety of industry verticals. SAP's operations are globally diversified, serving organizations of all sizes. It continues to invest in autonomous planning, industry-specific capabilities and deeper integration between planning and execution, with a roadmap emphasizing decision intelligence and a role-based user experience.

Strengths

- **Geographic strategy:** SAP benefits from a vast and mature global partner ecosystem and many of these partners are SAP-certified. As a result, a significant proportion of SAP deployments are delivered in collaboration with or entirely by partners, ensuring

customers have access to experienced resources, local market knowledge and scalable implementation support across all regions.

- **Customer diversity:** SAP demonstrates significant customer diversification. Its customer base spans sectors such as consumer products, food and beverage, chemicals, and more. This breadth enables SAP to address complex and varied SCP requirements, leveraging its experience with organizations of different sizes and industry needs.
- **Technical support:** SAP delivers strong global technical support through its 24/7 Customer Interaction Center (CIC). The CIC offers assistance in English year-round and provides multilingual support, including German, Mandarin, Japanese, Spanish, French and more, during regional office hours. Extensive self-service resources and knowledge base articles in multiple languages are available.

Cautions

- **Speed and scalability:** Recalculation of plans is, after manual intervention, primarily user-triggered, with limited automation and no true continuous planning. While planners can choose to do subnetwork planning on a limited part of the network, scenarios are typically recalculated in full rather than locally, which may affect speed in complex environments. Planned enhancements like local plan repair are not yet available and remain aspirational.
- **Decision-centric planning:** SAP's decision-centric planning capabilities remain largely user-defined, with priorities and workflows that require manual configuration and lack automation. Impact analysis is limited to KPI measurement and root cause analysis without a comprehensive framework or clear definition for impact, and the process for composing decision workflows appears less flexible.
- **Platform complexity:** SAP's SCP platform requires the deployment and integration of multiple solutions, such as SAP IBP, S/4HANA Advanced Available-to-Promise, Manufacturing Planning & Scheduling, and others, to achieve full functional coverage across the broad scope of SCP. This multiproduct landscape can increase platform complexity, implementation effort and ongoing management requirements.

Sunstice

Sunstice (formerly known as FuturMaster) is a Challenger in this Magic Quadrant. Its Sunstice solution is mainly focused on helping organizations in process manufacturing

industries navigate supply chain complexity into competitive advantage through demand and supply functionality. Sunstice also added production planning and scheduling capabilities through its February 2025 acquisition of PlaniSense. Sunstice's operations are concentrated in North America, Western Europe and the Asia/Pacific region, serving clients in dynamic and highly regulated environments. The vendor is investing advancements toward touchless demand planning, advancement of detailed scheduling and agentic AI to enable greater clarity, structure and agility in SCP.

Strengths

- **Speed of decision making:** Sunstice delivers strong speed and performance through mechanisms such as scope segmentation, local delta planning and adapted algorithms. By segmenting planning scopes and enabling targeted recalculations, the platform accelerates optimization and reduces computational load, supporting rapid response to changes without limiting data model size. This enables efficient planning across supply chain environments.
- **Customer sentiment and loyalty:** Sunstice receives consistently positive customer feedback, particularly for its customer service, support, and the evaluation and contract negotiation process. Clients also report a strong willingness to recommend the solution, resulting in an overall positive customer experience.
- **Strategy for upgrades:** Sunstice demonstrates strong release management and upgrade flexibility, delivering new functionality every six weeks while supporting legacy versions for up to seven years. The platform ensures backward compatibility through careful testing and feature toggles, allowing customers to upgrade at their own pace without disruption.

Cautions

- **Industry templates:** Sunstice does not offer industry-specific templates, focusing instead on templates aligned to organizational maturity. While there are specialized capabilities for fresh food, such as shelf life management, organizations in other sectors may find limited preconfigured industry content and may require additional customization to address their unique requirements.
- **Geographics strategy:** Sunstice's geographic strategy is limited compared to peers, with a relatively small number of offices and direct employees concentrated in North America, Western Europe and the Asia/Pacific region. The company maintains a modest network of

distributors and implementation partners, resulting in below average regional coverage and ecosystem depth.

- **Customer diversity:** Sunstice has a relatively modest overall customer base, with higher concentrations in only a few industries such as food and beverage and consumer products. Many other sectors have limited representation, which may reduce peer references and industry-specific expertise for organizations outside these core verticals.

Inclusion and Exclusion Criteria

In addition to Gartner client relevance, as determined by analyst expertise and opinion, vendors must also meet the following criteria to qualify for inclusion in the Magic Quadrant:

- The vendor must have a stand-alone SCP solution that can operate independently of ERP and other executional technologies as part of its application portfolio. All of the following SCP solution capabilities must have been commercially available (in general availability) as of 20 November 2025. 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:
 - Collaborative demand planning
 - Constraint-based multienterprise supply planning
 - Flexible and extensible solution architecture
 - User experience and workflow orchestration
 - AI-driven planning and decision automation
 - Unified data integration
 - Scenario management and financial impact modeling
 - Scalable high-performance planning

The solution must also be able to do manufacturing/capacity planning.

- 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
- Asia/Pacific region (comprising mature Asia/Pacific, China, emerging Asia/Pacific and Eurasia)
- Japan

One of the three offices had to be in North America or Western Europe.

- The vendor must have the following industry coverage:
 - The vendor must have at least 25 customers within the process industry vertical and customers from the process industry vertical must account for at least 50% of the total customer base across both the discrete and process industry verticals, **OR**
 - The vendor must have at least 80 customers within the process industry vertical and customers from the process industry vertical must account for at least 20% of the total customer base across both the discrete and process industry verticals.

The process industry vertical consists of the following industries:

- Consumer products
- Food and beverage
- Pharmaceuticals
- Paper and pulp
- Oil and gas
- Metals
- Chemicals

Honorable Mentions

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

- **Board** is a privately held vendor with European headquarters in Switzerland and U.S. headquarters in Boston, Massachusetts. Its process industry customers are primarily situated in the consumer products, food and beverage, oil and gas, and pharmaceuticals verticals. Its Board Enterprise Planning Platform offers integrated business planning, including demand, supply, S&OP and financial planning, on a unified platform as a SaaS offering on Microsoft Azure, available in both public and private cloud configurations. The platform's flexibility supports process industry requirements for scenario modeling and S&OP, with embedded analytics and workflow automation.
- **E2open**, headquartered in Texas, delivers SCP solutions with a focus on multienterprise supply chain collaboration and orchestration across all process industry verticals. The platform supports demand sensing, demand planning, inventory optimization, supply planning, supply sensing and S&OP, leveraging a global network for real-time collaboration and visibility. The vendor's technology vision is to be a scalable, cloud-native architecture with integrated planning and execution capabilities. E2open was acquired by WiseTech Global in August 2025.
- **Elixum**, owned by Accenture and headquartered in Germany, offers the Supply Chain Avatar platform for operational planning, S&OE, production planning and scheduling. The platform is designed to meet the needs of process industries such as pharmaceuticals, chemicals and consumer products, using advanced analytics and scenario simulation to improve supply chain agility and performance.
- **GAINS** is a privately held vendor headquartered in the U.S. Within process industries, its customer base is primarily within consumer products, metals, and food and beverage. Its composable GAINS DEO platform supports end-to-end planning, including network design, inventory optimization and service parts planning. The platform aims for rapid deployment and measurable improvements in inventory and service levels.
- **ICRON** is a privately held vendor headquartered in the Netherlands. Its ICRON platform delivers advanced SCP capabilities, including demand planning, production scheduling, order promising, S&OP and network design. Designed for complex, process-driven

environments, ICRON focuses on all verticals within the process industry with customers primarily in consumer products, food and beverage, and life sciences. ICRON leverages optimization and AI-driven analytics to provide real-time, end-to-end visibility and scenario planning.

- **REMIRA**, headquartered in Germany, provides SCP capabilities through its SCP solution and focuses within process industries primarily in the food and beverage vertical. The cloud platform offers integrated demand and supply planning modules, supporting S&OP with AI forecasting, production planning and scheduling, and supplier collaboration. REMIRA shows particular emphasis on improving forecast accuracy and inventory efficiency, striving toward touchless planning.
- **sedApta** operates as part of Elisa Industriq, a European software provider headquartered in Finland. It specializes in solutions for process industries such as food and beverage, cosmetics, glass, tyre, and metal. sedApta offers functionalities encompassing areas such as demand planning and sensing, S&OP, inventory management and distribution requirements planning, as well as production planning and scheduling. It has a strong focus on Industry 4.0 technologies, enabling smart manufacturing transformation through real-time data utilization, KPI monitoring and manufacturing execution system integration.
- **Slimstock** is a privately held vendor headquartered in the Netherlands with its process industry customer base primarily situated within the food and beverage vertical. Its Slim4 platform offers S&OE, S&OP and IBP, with demand forecasting, inventory optimization and supply planning capabilities on a cloud-based platform. Slimstock's solutions are widely used for their ease of use, rapid implementation and focus on continuous inventory improvement.
- **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.
- **ToolsGroup** is a privately held vendor headquartered in the U.S. with a process industry customer base primarily situated within the food and beverage and pharmaceuticals verticals. Its Service Optimizer 99+ (SO99+) platform provides AI-powered demand

forecasting, inventory optimization and supply planning. ToolsGroup's solutions are recognized for their advanced probabilistic modeling and automation, supporting resilience and service-level improvements in process manufacturing environments.

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. It also includes methods used by a vendor to help customers deploy, maintain and develop SCP solutions. The evaluation examined opportunities for a vendor's customers to be educated on, and to use, best practices and emerging practices for SCP, including how to enable customers to manage the solution independently. It also evaluated the techniques and features to increase 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 blend of customers using the current instance of the product, as well as recognition by customers in the market. It is also reflected in 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

The evaluation criteria for product or service, market responsiveness/record, customer experience and operations represent the primary drivers for vendor selection among the Ability to Execute criteria. As shown in the following table, 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 vendors' customers, and how vendors operate during and after implementation.

The criteria for overall viability, sales execution/pricing and marketing execution 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.

Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	High

Source: Gartner (March 2026)

Completeness of Vision

Gartner evaluates a vendor’s Completeness of Vision by applying criteria that assess its ability to understand current market trends and transform these into roadmap initiatives, as well as its vision for how emerging technologies can further the goals of SCP and ensure adoption of the software. The criteria also assess 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. Furthermore, they should understand what drives the industry verticals they target, to deliver solutions that address those particular needs.

The criteria for market understanding, offering (product) strategy, vertical/industry strategy (see Note 1) and innovation assess how vendors support a company’s digital SCP aspirations and how they envision planning will transform the future planning concepts. Also assessed is how they converge with cross-enterprise functions beyond the supply chain, taking into account industry specifics.

The criteria for marketing strategy, business model and geographic strategy indicate vendors’ investment and growth strategies, and focus on evolving their SCP solution, including their vision for supporting customers across geographies.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (March 2026)

Quadrant Descriptions

Leaders

Leaders in the SCP market demonstrate exceptional vision and execution capabilities, offering comprehensive, differentiated functionality that meets a wide spectrum of user requirements, including industry-specific requirements. Their solutions deliver robust support across all key areas of SCP, providing a balanced mix of features that address both current needs and future developments.

These vendors empower organizations throughout their maturity journeys, with a strategic vision for enabling advanced planning environments that aligns closely with Gartner's perspective. Leaders are forward-thinking, anticipating shifts in customer demands and market dynamics, and clearly articulating how innovative technologies can enhance planning processes. Their strategies are designed to support emerging requirements, ensuring their SCP solutions remain future-proof, drive high-quality decision making and foster strong user adoption.

Leaders are typically well-established in complex, leading-edge environments, benefiting from engaged user communities that keep them attuned to evolving needs and foster ongoing innovation. They also demonstrate solid financial performance and sustainability, with strong market penetration and widespread usage among their customer base. Many organizations rely on a single instance of a Leader's SCP software to support large-scale planning models and manage significant supply chain complexity.

Challengers

Challengers demonstrate strong execution capabilities and a solid track record of successful implementations. Their solutions reliably support Level 3 maturity SCP processes and are often deployed as single, global instances. While their product features and technical strengths are well-suited for current planning needs within the relevant industry verticals, other aspects of their offerings are still evolving.

However, Challengers tend to lag in aligning their product roadmaps with Gartner's vision for the future of SCP solutions and in adopting emerging technologies. This may limit their ability to help organizations advance to higher levels of planning maturity. Nonetheless, customers are generally satisfied with the value and performance these vendors deliver across their supply chains.

Challengers are typically favored by organizations that prioritize strong execution over visionary innovation — particularly when the SCP solution is already part of the enterprise's technology landscape or there is an existing vendor relationship. These vendors have demonstrated long-term viability, with stable financial performance and reliable products. They provide an adequate customer experience, enabling clients to independently manage and sustain their SCP environments with minimal vendor support.

Prospective buyers should carefully assess Challengers based on their current capabilities and limitations, and consider how any gaps might affect their near-term goals for advancing SCP maturity.

Visionaries

Visionaries present a compelling and forward-thinking vision for their SCP solutions, setting themselves apart through their innovative approach and strategic outlook. Their product roadmaps demonstrate a thoughtful balance between anticipating where user requirements are heading and leveraging key technological advancements, such as AI, digital supply chain twins and multienterprise planning, to address those evolving needs.

Visionaries are often recognized as thought leaders within the SCP technology landscape, frequently pioneering new concepts and capabilities that shape the direction of the industry. Their management teams are committed to advancing the state of SCP technology, prioritizing research and development efforts that push the boundaries of what is possible technologywise.

Despite their strengths in vision and innovation, Visionaries may currently face certain limitations. These can include functional gaps in their SCP solutions, a lack of live customer references, lower brand recognition or relatively weaker financial resources compared to more established competitors. In some cases, their solutions may exhibit exceptional depth in a specific functional area, such as demand planning or S&OP, while still building out broader capabilities required for a comprehensive SCP suite.

Visionaries tend to attract organizations that are looking for cutting-edge capabilities and willing to partner closely with vendors to co-develop or pilot new features. Early adopters that choose Visionaries often benefit from access to the latest technological innovations and the opportunity to influence product direction. However, these organizations should also be prepared for potential risks associated with adopting solutions that are still maturing or lack the extensive support infrastructure of more established vendors. For organizations seeking

to stay ahead of the curve and invest in the future of SCP, Visionaries represent an exciting and influential segment of the vendor landscape.

Niche Players

While it may be tempting to assume that vendors positioned in the other quadrants are always the best choices for new SCP buyers, the reality is more nuanced. Depending on an organization's specific circumstances, a Niche Player can be just as effective — or even superior — to a Leader, Challenger or Visionary. This is especially true when a Niche Player's focus aligns closely with the buyer's unique requirements, such as specialized support for a particular geography, industry vertical or functional area like finished goods planning. Their deep expertise and tailored offerings can provide significant value where broader solutions may fall short.

Niche Players are often recognized as specialists within the SCP landscape. They excel at delivering point solutions that address targeted aspects of SCP, such as demand forecasting, inventory optimization or network design. In many cases, their solutions are highly refined and purpose-built, offering advanced capabilities that cater to the specific needs of their chosen market segments. This specialization can result in superior performance and a better fit for organizations with distinct requirements that may not be fully addressed by more generalized platforms.

Moreover, Niche Players are frequently leveraged as part of a best-of-breed strategy, where organizations integrate their solutions alongside those from other SCP vendors to achieve comprehensive, end-to-end planning capabilities. This approach allows companies to combine the strengths of multiple providers, ensuring that each aspect of their supply chain is supported by the most appropriate technology.

For prospective buyers, it is important to carefully consider the unique advantages that Niche Players offer. Their focused expertise, agility and commitment to serving specific market needs can make them invaluable partners, especially for organizations seeking tailored solutions or operating in specialized environments. Ultimately, the best choice of SCP vendor depends on the alignment between the provider's strengths and the buyer's strategic goals, operational context and long-term vision.

Context

Companies increasingly seek to invest in SCP solutions that enable them to achieve higher levels of maturity and seamlessly scale as their planning requirements evolve. While some organizations still assess SCP solutions based on specific functional needs, such as demand planning or sales and operations planning, they often do so with the goal of leveraging the broader capabilities offered by these tools. Historically, these functional requirements were addressed through a patchwork of disparate SCP applications. However, this fragmented approach made it difficult to achieve the end-to-end visibility necessary for effective enterprisewide planning across various time horizons.

As a result, SCP solutions have evolved toward unified data model environments, where a single, integrated model supports all planning activities. Consequently, buyers are now more inclined to partner with a single vendor offering a comprehensive SCP suite that addresses the majority, if not all, of their SCP technology needs.

The trend toward unified SCP platforms continues to shape the market, but we are now witnessing another wave of transformation. End-user organizations are increasingly prioritizing flexibility and choice in their planning solutions, seeking to avoid being constrained by the limitations of a single technology provider, especially when those capabilities fall short in specific areas. In response, vendors are opening up their platforms, enabling organizations to embed custom algorithms or integrate third-party solutions, all while maintaining a strong focus on governance, adaptability and user experience.

Although this evolution is still in its early stages, it is clearly the direction in which the SCP technology landscape is heading. Additionally, we are seeing a surge in acquisitions within the SCP space, as vendors seek to expand their offerings and deliver broader, more comprehensive capabilities to meet the evolving needs of their customers.

Recommendations

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

- Clearly articulate your business strategy, taking into account the key factors that influence your supply chain's success.
- Establish a direct connection between your business strategy and both your supply chain and SCP strategies. Determine the specific capabilities your SCP solution must deliver to drive meaningful business value.

- Assess the current (“as is”) maturity level of your core SCP processes, such as S&OP, demand planning and supply planning, to understand your starting point.
- Define the desired (“to be”) maturity level for each relevant SCP process to ensure alignment with your overarching business strategy. Consider phasing the journey toward your target state, allowing adequate time for stabilization and optimization at each stage.
- Develop a comprehensive SCP technology vision and roadmap that addresses existing gaps and positions your organization for future growth.
- Identify and evaluate technology solutions that support both current and anticipated capability requirements. Leverage insights from this Magic Quadrant and the associated **Critical Capabilities for Supply Chain Planning Solutions: Process Industries** to inform your decision-making. Engage Gartner analysts for expert guidance throughout the selection and implementation process.

Market Overview

The SCP market was worth \$8.4 billion in 2025 and is forecast by Gartner to exceed \$15.1 billion through 2029, resulting in a compound annual growth rate (CAGR) of around 15% (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 across a variety of industries covering discrete manufacturing, process manufacturing and those that are distribution-intensive.

SCP capabilities are highly critical for companies, as supply chains face growing disruptions, uncertainties and variability. This heightened complexity has driven significant market attention and investment in SCP solutions. The SCP landscape is highly competitive, featuring a wide array of providers, from large, established technology vendors to agile, privately funded software firms. Many of the leading vendors initially specialized in specific aspects of planning, such as inventory management, production scheduling or S&OP. Over time, they have broadened their offerings across multiple SCP disciplines through both internal development and strategic acquisitions.

Meanwhile, new entrants, often leveraging expertise in big data and AI, are targeting specific, short-term planning challenges to address gaps in incumbent solutions and deliver rapid ROI. This influx of innovation is pushing traditional SCP vendors to integrate advanced

capabilities, including AI/ML, generative AI, intelligent agents, cognitive computing, and enhanced support for big data and simulation.

In recent years, the market has also seen a rise in partnerships, ranging from technology collaborations for broader functional coverage to implementation alliances for expanded deployment resources, and data partnerships for access to broader data sources.

Additionally, there has been a notable increase in acquisitions, with vendors seeking to enhance their functional breadth and deliver more comprehensive solutions.

Reflecting the evolving needs of customers, research in this space has become increasingly industry-specific, recognizing that different sectors require tailored SCP capabilities to address their unique challenges. As a result, this Magic Quadrant provides a multiregional, industry-focused analysis designed to meet the needs of Gartner's clients in North America and Western Europe. The SCP solution vendors featured in this Magic Quadrant are evaluated not only on their overall capabilities, but also on their ability to address industry-specific requirements and to serve multinational organizations headquartered in these regions and beyond.

Note 1: Industries/Verticals

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

⊕ Evaluation Criteria Definitions

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