

# Magic Quadrant pour les systèmes de gestion des transports

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Les systèmes de gestion du transport aident les responsables de la chaîne logistique à gérer les perturbations et à optimiser les coûts. Avec l'évolution des exigences et la croissance du marché des TMS, le paysage des fournisseurs est devenu plus dense et complexe. Les responsables des technologies de la chaîne logistique devraient s'appuyer sur cette étude pour évaluer le marché des TMS.

## Définition/Description du marché

Gartner définit les systèmes de gestion du transport (TMS) comme des logiciels prenant en charge la planification et l'exécution multimodales du transport physique de marchandises tout au long de la chaîne d'approvisionnement. Ils permettent à un expéditeur de gérer différents niveaux de complexité du transport, sur plusieurs modes de transport et dans différentes régions géographiques. Les solutions TMS sont utilisées par des expéditeurs de tailles, de complexités opérationnelles, de secteurs d'activité et de zones géographiques variés.

Les solutions TMS permettent de planifier et d'exécuter le transport physique des marchandises tout au long de la chaîne d'approvisionnement. Elles permettent à l'expéditeur de gérer l'intégralité du cycle de transport d'une commande ou d'une expédition. Cela comprend :

- Sourcing et approvisionnement de capacités de transport auprès d'entreprises tierces en soutenant la gestion et l'optimisation des offres.

- Prise de commandes pour fournir un plan d'expédition, y compris la consolidation des commandes et des expéditions, la sélection du mode, les itinéraires et la sélection du transporteur.
- Prendre le plan d'expédition et permettre les communications avec les transporteurs pour faciliter l'exécution du plan.
- Suivi et traçabilité des mouvements des expéditions depuis l'enlèvement jusqu'à la livraison finale.
- Faire correspondre les frais de transport prévus aux frais réels pour gérer les écarts.
- Prendre de meilleures décisions en matière de transport en utilisant des capacités d'analyse et de reporting intégrées pour mesurer les indicateurs de performance clés , tels que la ponctualité, les calculs d'émissions et les coûts par client, gamme de produits et emplacement.

Les solutions TMS permettent à un expéditeur d'avoir un contrôle plus strict de ses opérations de transport, d'optimiser les coûts, d'améliorer l'efficacité et d'avoir une meilleure visibilité sur le mouvement des marchandises.

## Caractéristiques obligatoires

Les caractéristiques obligatoires pour ce marché incluent :

- Disponibilité en tant qu'application autonome en libre-service, utilisée indépendamment des autres produits ou services (y compris les services externalisés ou gérés) proposés par le fournisseur.
- Capacités d'approvisionnement et d'approvisionnement en fret pour rechercher et acquérir des capacités de transport auprès d'entreprises tierces en soutenant la gestion et l'optimisation des offres.
- Capacités de planification pour la prise de commandes afin de fournir un plan d'expédition optimisé en termes de coûts et de services, y compris la consolidation des commandes et des expéditions, la sélection du mode, la détermination de l'itinéraire et la sélection du transporteur.
- Capacités d'exécution pour prendre le plan d'expédition et permettre les communications avec les transporteurs pour faciliter l'exécution par rapport au plan.

- Capacités de visibilité pour suivre et tracer les mouvements des expéditions depuis le ramassage jusqu'à la livraison finale.
- Capacités de règlement permettant de faire correspondre les frais de transport prévus aux frais réels afin de gérer les écarts.
- Capacités analytiques pour prendre de meilleures décisions en matière de transport en utilisant des capacités d'analyse et de reporting intégrées pour mesurer les indicateurs de performance clés, tels que les performances ponctuelles, les calculs d'émissions et les coûts par mode, client, gamme de produits et emplacement.

## Caractéristiques communes

Les caractéristiques communes de ce marché incluent :

- Capacités de planification de rendez-vous/quai permettant la gestion des rendez-vous pour les chargements sortants ou entrants et la collaboration entre les expéditeurs et les transporteurs pour planifier électroniquement les rendez-vous aux portes du quai.
- Fonctionnalités de routage et de planification/répartition des véhicules de flotte privée pour la répartition et les opérations de flotte privée, y compris la planification basée sur les actifs, l'optimisation du dernier kilomètre, la répartition de la flotte et la planification des conducteurs.
- Capacités d'optimisation et de manifestation des colis pour sélectionner le meilleur transporteur de colis parmi tous les transporteurs sous contrat, exécuter les expéditions, obtenir une visibilité basée sur les événements et imprimer des étiquettes et des manifestes.
- Capacités de modélisation des transports pour soutenir la planification stratégique et tactique en créant des scénarios hypothétiques pour des changements potentiels de réseau ou d'itinéraire et une analyse et une planification de scénarios prospectifs.
- Capacités de prévision des transports permettant de simuler des scénarios en calculant et en gérant les besoins de capacité des semaines à l'avance et en créant des espaces réservés pour les commandes prévues dans le futur plan de transport.
- Capacités de création de charge 3D pour optimiser la configuration 3D des marchandises dans un camion ou un conteneur, en utilisant la capacité de conception de charge pour créer des plans pour des palettes mixtes, des modèles de palettes optimaux et une

optimisation de charge pour gérer l'espace et la capacité en fonction des caractéristiques d'expédition.

## Quadrant magique

Figure 1 : Quadrant magique des systèmes de gestion des transports



Gartner

### Points forts et précautions du fournisseur

#### Alpega

Alpega figure parmi les Challengers de ce Magic Quadrant. Sa solution, Alpega TMS, est axée sur les opérations de transport et propose un portefeuille de solutions évolutives en fonction de la complexité des transports de l'organisation. La majorité des clients d'Alpega sont basés en Europe ; cependant, la présence d'Alpega se développe en Amérique du Nord et en Asie. Alpega compte des clients dans les secteurs de la fabrication discrète, de la distribution, des biens de grande consommation et de l'industrie pharmaceutique.

La feuille de route des produits Alpega se concentre sur des domaines tels que l'amélioration de la collaboration avec les transporteurs, l'optimisation des approvisionnements en transport, ainsi que les capacités d'approvisionnement et le support des documents numériques . Alpega TMS offre des capacités d'intégration et de collaboration approfondies avec SAP S/4 HAN A.

#### *Points forts*

- **Marketing Strategy:** Alpega is increasingly visible in the transportation management system (TMS) market. Its effective go-to-market strategy, using various channels and media, is reflected by strong growth and retention in Europe.
- **Market Responsiveness:** Alpega often provides capabilities that its clients request through such channels as direct feedback, advisory boards, strategic product webinars and an ideation portal.
- **Sales Execution/Pricing:** Alpega continues to add enterprise-level organizations as customers. It has strengthened its sales team with additional personnel and resources.

#### *Cautions*

- **Geography Strategy:** Although Alpega continues to grow its customer portfolio in Europe, there has been limited growth of customers in other regions. Its strong focus on its home market may be hindering further opportunities in larger or faster-growing markets.
- **Vertical Strategy:** Alpega has a footprint in different vertical markets; however, it has been unable to exhibit industry-specific capabilities. Organizations looking for such capabilities in TMS solutions should evaluate Alpega's vertical strategy in more detail.
- **Operations:** Alpega trails other vendors in this Magic Quadrant in implementation resources, and its network of implementation partners remains small. Organizations that

are interested in global deployments or are based outside Europe should evaluate Alpega's implementation and support resources.

## Aptean

Aptean is a Niche Player in this Magic Quadrant. Its TMS product, 3T Logistics, was acquired when Aptean expanded its capabilities by acquiring the U.K.-based 3T Logistics & Technology Group in November 2023. 3T Logistics focuses mainly on supply chain operations, providing shipper organizations with such capabilities as load optimization, vehicle routing, dock scheduling and parcel management. Most of 3T Logistics' operations and the majority of its customers are in Europe. 3T Logistics' customers tend to be small and midsize businesses (SMBs), with lower levels of transportation complexity.

Aptean supports customers across industries, but has a particular focus on manufacturing, food and beverage, retail, and pharmaceuticals. Recent or planned innovations include 3D load building, user interface (UI) and user experience (UX) enhancements, AI-assisted chatbots using generative artificial intelligence (GenAI), and freight cost benchmarking.

### Strengths

- **Overall Viability:** Although 3T Logistics is one of the smaller products in this Magic Quadrant in terms of customers and revenue, the November 2023 acquisition provides it with a larger, more financially stable home. Aptean should be able to provide additional funding for future 3T Logistics product enhancements.
- **Business Model:** TMS is a significant piece of Aptean's overall revenue and growth, thanks, in part, to multiple acquisitions in previous years. Aptean has also shown a willingness to adapt to the changing TMS market with plans to continue significant investments in AI capabilities to be leveraged in 3T Logistics and other products.
- **Customer Experience:** Aptean provides 3T Logistics user training during system rollout and also reports one of the shortest implementation times for vendors in this Magic Quadrant. Reported uptime availability of 99.9% meets the baseline expectation for TMS solutions.

### Cautions

- **Vertical/Industry Strategy:** Aptean's 3T Logistics product has limited industry vertical marketing strategies and does not have defined marketing approaches to markets outside North America and Europe. Aptean lacks dedicated sales resources based on industry.

- **Market Responsiveness/Record:** 3T Logistics' retention numbers during the previous two years are below average for vendors in this Magic Quadrant. In addition, Aptean completed a lower overall average percentage of its planned product roadmap for 2023 and through the research period of 2024 for this research. Potential customers should consider 3T Logistic's track record for customer satisfaction and ability to deliver innovation.
- **Product or Service:** 3T Logistics provides a high percentage of core and extended TMS functionality, but lacks the depth of product capabilities offered by other vendors in this Magic Quadrant. Potential customers will need to determine whether its transportation complexity is a good fit for the capabilities provided by 3T Logistics.

## BlueRock TMS

BlueRock TMS is a Niche Player in this Magic Quadrant. Its product, BlueRock TMS, focuses on providing a single solution to manage global transportation via three different starter package bundles for nonasset shippers, network operations and last-mile distribution. Its operations are primarily focused in Europe. The majority of BlueRock's customers are based in Europe and tend to be SMBs with low-to-medium levels of transportation complexity.

Its customers are primarily in the third-party logistics (3PL), consumer products, retail, distribution and life science industries. Recent or planned innovations include enhanced real-time monitoring, UX improvements, expansion of self-service and configuration capabilities, and scenario simulations for tactical preplanning.

### *Strengths*

- **Market Understanding:** BlueRock TMS exhibits strong alignment with several key trends in the TMS market. These include expanding the scope of visibility, increasing the use of AI techniques to increase automation, and improving the speed-to-value and return on investment (ROI) of TMS solutions.
- **Marketing Strategy:** BlueRock TMS's expanded marketing strategy includes separate marketing approaches for more than a dozen industry verticals. Its strategy also includes different approaches for multiple buyer personas.
- **Customer Experience:** BlueRock TMS has received positive customer feedback in flexibility during negotiations on both cost and terms. Its reported uptime availability of 99.9% meets the baseline expectation for TMS solutions.

## Cautions

- **Sales Strategy:** BlueRock TMS has one of the smallest number of sales offices globally, as well as a small number of individual sales personnel, in this Magic Quadrant. BlueRock has not established formal sales partnerships or resellers. These factors cap its growth potential.
- **Geographic Strategy:** Potential customers outside Europe should evaluate BlueRock's ability to support their sales and support needs. BlueRock TMS is increasing its presence in markets outside Europe, but the majority of its customer base and revenue remain in that region.
- **Marketing Execution:** BlueRock TMS trails other vendors in this Magic Quadrant in brand name recognition and familiarity with its product. BlueRock's attendance at industry events has been low, compared with other vendors, and it did not offer any vendor-led webinars. Potential customers have fewer opportunities to interact with and understand BlueRock TMS.

## Blue Yonder

Blue Yonder is a Leader in this Magic Quadrant. Its product, Blue Yonder TMS, is focused on providing global transportation capabilities across all modes of transport, with capabilities ranging from transportation procurement to modeling. Its operations are geographically diversified with the majority of its customers based in North America.

Blue Yonder TMS customers tend to be large enterprises with higher transportation complexity and are spread across industries. It concentrates on retail, manufacturing, 3PL, consumer products, pharmaceuticals and healthcare. Recent or planned innovations include lateness risk prediction, UX updates for improved usability and personalization, ad hoc scheduling for fleet dispatch, and multiple conversational GenAI use cases.

## Strengths

- **Overall Viability:** Blue Yonder is owned by Panasonic. This has enabled increased funding to fuel recent acquisitions, such as One Network Enterprises and flexis, strong R&D investment, and significant growth in head count associated with its TMS product.
- **Market Understanding:** Blue Yonder exhibits strong alignment to key trends in the TMS market, including its increasing use of AI, growing scope of visibility and shifts toward composable microservices.



- **Offering (Product) Strategy:** Blue Yonder TMS exhibits a strong focus on improving the overall UX, while offering a solution with deep functionality to support high levels of transportation complexity. It has also cultivated a large ecosystem of partners, ranging from implementation providers to complementary transportation technologies, providing multiple options for potential customers.

### *Cautions*

- **Vertical/Industry Strategy:** Potential customers seeking more specialized industry capabilities should review Blue Yonder's specific functionality by industry and assess its plans to invest in vertical specific capabilities. Its recent innovations were primarily for its broader customer base, rather than unique capabilities for its focus industries.
- **Marketing Strategy:** The percentage of revenue that Blue Yonder has dedicated to marketing is lower than average, compared with other vendors in this Magic Quadrant. It is also shifting its strategy to attend fewer industry events in 2025.
- **Market Responsiveness/Record:** Blue Yonder TMS has struggled to grow its customer base in the small and midmarket segments. This is primarily driven by its higher overall total cost of ownership (TCO) and longer average implementation times. It has yet to adapt its offering for potential customers in these segments.

## **C.H. Robinson**

C.H. Robinson is a Challenger in this Magic Quadrant. Its product, Navisphere TMS, is mainly focused on end-to-end transportation management. In addition, it supports a fully managed transportation offering. It has a real-time transportation visibility platform, embedded in its TMS.

Its operations are geographically diversified, with North America as its largest customer base. Its clients tend to be SMBs primarily in the industrial manufacturing, consumer products and automotive industries. Recent innovations include transactional API for rating and quoting, enhanced advanced analytics, and an advanced shipment planning optimizer for self-service shipment planning.

### *Strengths*

- **Marketing Execution:** C.H. Robinson has strong brand name recognition, especially in North America. It effectively uses such channels as social media, industry-focused events and online forums to extend its brand reach.

- **Vertical/Industry Strategy:** C.H. Robinson has customers across many industries and is showing growth across a variety of industries as well. In addition, it has dedicated TMS technology resources assigned to a number of its identified priority industries to enhance industry-specific offerings.
- **Overall Viability:** C.H. Robinson has demonstrated longstanding financial health. The company continues to invest in its TMS solution to grow dedicated resources, as well as R&D investments year over year.

### *Cautions*

- **Offering (Product Strategy):** C.H. Robinson has a less developed roadmap and partnership ecosystem for complementary transportation technologies. Potential customers that may need or want additional services or capabilities alongside Navisphere should evaluate the overall roadmap and partnership landscape for Navisphere.
- **Sales Strategy:** C.H. Robinson has fewer internal and external partner sales resources dedicated to the TMS product, compared with many of its competitors in this Magic Quadrant. This affects its ability to sell and close new TMS deals.
- **Operations:** Potential customers should ensure the allocation and location of implementation resources to their projects. C.H. Robinson offers robust, comprehensive implementation tools and programs to support customers and has had ongoing success with the TMS. However, its number of and locality variety of dedicated implementation resources trails that of other vendors in this Magic Quadrant.

### **e2open**

e2open is a Leader in this Magic Quadrant. e2open Transportation Management is focused on end-to-end transportation management, while also being part of a broader logistics suite that includes global logistics orchestration and advanced logistics visibility. Its operations are geographically diversified, with the majority of its customers in North America.

Its customers tend to be SMBs with low-to-medium levels of transportation complexity, primarily in the food and beverage, consumer products, industrial, and retail industries. Recent or planned innovations include native integration with electronic logging device (ELD) provider Samsara, enhancements to transportation procurement through its freight-rate index, and spot market automation features and updates to its load-planning capabilities.

## Strengths

- **Marketing Strategy:** e2open's marketing strategy excels in the use of various marketing channels and in addressing individual audiences and industries to send its message. e2open continues to build brand awareness campaigns that increase visibility.
- **Offering (Product) Strategy:** e2open's platform and product portfolio offers e2open TMS buyers a wide range of integration with other supply chain and network products. e2open is focused on enhancing the integration of its solution with internal and external products.
- **Marketing Execution:** e2open has built strong brand name recognition, especially in the logistics and service provider industry. It displays effective use of such channels as online forums, webinars and industry-focused events.

## Cautions

- **Overall Viability:** Although e2open is one of the largest vendors in this Magic Quadrant by TMS revenue, the vendor seems to be losing momentum — its latest financial report showed a decline in gross revenue.
- **Innovation:** e2open developed a comprehensive roadmap for 2025, but did not show the same level of innovation and product roadmap vision as other leaders in this Magic Quadrant.
- **Market Responsiveness/Record:** e2open has worked extensively to improve customer relationships, and its overall customer retention rate remains high. However, there are rising customer concerns about its service and support capabilities.

## Infios (MercuryGate)

Infios is a Challenger in this Magic Quadrant. Körber Supply Chain Software completed its acquisition of MercuryGate in October 2024 and was rebranded as Infios, a Körber company. Its solution, Infios TMS, is broadly centered on providing domestic and international functionality.

Its operations are primarily focused in North America, and Infios clients are spread relatively evenly among small, midsize and large organizations. More than half of its customers are 3PL, freight forwarders and brokerage sectors. Among shippers, Infios has a strong presence in industrial, wholesale distributors, and food and grocery. Much of its focus in 2025 will be

on go-to-market as Infios and building out integrated capabilities across its supply chain execution suite.

### *Strengths*

- **Operations:** Infios consistently delivers value through its support and deployment projects, leveraging both internal professional services and a wide network of implementation partnerships.
- **Vertical/Industry Strategy:** Infios has a varied portfolio of customers in different industries and verticals. Its clientele includes 3PLs, freight forwarders and a mix of shippers, from industrial to the food and grocery sectors.
- **Sales Execution/Pricing:** Infios is well-recognized in the TMS market and has experienced above-average growth in net new customers. Its products and services are seen as budget-friendly options.

### *Cautions*

- **Market Responsiveness:** Infios has one of the lowest retention rates in this Magic Quadrant, partly due to the absence of a unified interface for its modules, which hampers UX.
- **Innovation:** Infios did not exhibit the same level of innovation and product roadmap vision as other vendors in this Magic Quadrant. Potential customers should determine whether the company's TMS roadmap fully aligns with their future requirements and needs.
- **Business Model:** With the acquisition of MercuryGate into the Infios portfolio, it will look to expand its customer base by cross-selling the TMS to existing Infios clients. Potential customers, particularly those using WMS, should evaluate the effectiveness of a unified execution suite, possible integration challenges and fragmented UX.

## **Manhattan Associates**

Manhattan Associates is a Leader in this Magic Quadrant. Manhattan Active Transportation Management (TM) is a solution that focuses on end-to-end transportation management. It is part of the Manhattan Active Supply Chain Platform solution, which includes warehouse management, yard management, carrier management and labor management systems.

Its operations are geographically diverse, with North America being its most important customer base. Its clients are mostly large corporations in the retail, grocery, distribution and manufacturing industries. Recent developments include load builder enhancements to improve efficiency and utilization, GenAI capabilities in the platform, and unification of the yard management system (YMS) with TMS.

### *Strengths*

- **Operations:** Manhattan Associates' offering includes dedicated resources, along with robust and comprehensive implementation tools and programs to help support customers in both implementation and ongoing success across a variety of locations.
- **Marketing Strategy:** Manhattan Associates has clear and consistent messaging for its TMS solutions and continues to grow its recognition in tandem with other Manhattan Active Platform applications. It continues to invest a large portion of TMS revenue into a diverse (in terms of regional, industry and buyer persona-tailored messaging) marketing strategy, which has resulted in increased visibility.
- **Offering (Product Strategy):** Manhattan Associates' cloud-native microservice platform offers TMS buyers a differentiated technology architecture. It is making notable investments to build applications on a single interface. It now offers TMS, warehouse management system (WMS), order management system (OMS), and supply chain planning (SCP) on a common platform.

### *Cautions*

- **Sales Strategy:** Manhattan has fewer sales resources and channel partners than many other vendors in this Magic Quadrant. It will need to address this to penetrate new industry verticals and further expand outside its home market.
- **Market Responsiveness:** Manhattan has a lower customer retention rate and has completed a less-than-average percentage of the most recent annual roadmap, through the research period of 2024 for this research, than some of the leaders in this Magic Quadrant.
- **Sales Execution/Pricing:** Although there is a strong focus on marketing for its TMS solution, Manhattan Associates continues to deliver one of the lowest year-over-year growth rates among the Leaders in this Magic Quadrant. The vendor offers fewer pricing options than some other vendors in this research.

## Oracle

Oracle is a Leader in this Magic Quadrant. Oracle Fusion Cloud Transportation Management is mainly focused on transportation management as part of a set of logistics solutions that includes warehouse management, global trade management (GTM) and intelligent technologies. Its operations are geographically diversified, and its clients are distributed across enterprise size and industry.

Recent or planned innovations include ETA predictions for in-transit events, sustainability reporting and measuring enhancements, and continued improvements on intermodal visibility, including rail carbon tax calculation and settlement.

### *Strengths*

- **Marketing Responsiveness/Record:** Oracle exhibits strong market knowledge and thought leadership in the transportation management market. Oracle Transportation Management (OTM) has a strong record of delivering capabilities in several markets.
- **Product or Services:** OTM offers overall depth of functionality, particularly in planning and execution. OTM is a holistic TMS solution with a robust set of capabilities.
- **Market Understanding:** Oracle effectively addresses key transportation management trends, such as sustainability and AI integration. Its product roadmap reflects a deep understanding of buyer needs, offering solutions that enhance efficiency and compliance.

### *Cautions*

- **Vertical Strategy:** Oracle has an industry-agnostic approach to the TMS market. This limits its ability to deliver industry-specific TMS capabilities. Organizations seeking vertical or industry-specific specialization in TMS should evaluate its current and planned capabilities closely.
- **Sales Execution/Pricing:** Although Oracle accommodates flexible pricing via a willingness to negotiate and discounts, its subscription and implementation costs remain at the high end, compared with some of its competitors.
- **Business Model:** Oracle is dedicated to its supply chain offerings; however, TMS is a relatively smaller part of its broader corporate business strategy. Organizations should review and evaluate its product roadmap and level of investment in the TMS product to ensure it meets their present and anticipated future needs.

## Pando

Pando is a Visionary in this Magic Quadrant. Its product, Pando TMS, is primarily focused on providing transportation management via a platform that includes freight procurement, as well as freight audit and payment.

Its operations are mostly split between Asia and North America. The majority of Pando's customers are based in Asia with other markets, including North America, a focus for future growth. Recent or planned innovations include carbon emissions analytics, private fleet routing and appointment scheduling, forecast order creation and transportation plan, and agentic AI use cases.

### *Strengths*

- **Innovation:** Pando invests a higher-than-average percentage of its TMS revenue into R&D, compared with other vendors in this Magic Quadrant. It has a strong focus on AI and the use of agentic AI to enable more autonomous workflows and decision making.
- **Operations:** Pando provides customers with options for the timing of updates and new releases, a suite of integration tools and templates to accelerate implementation, and formal programs to support key performance indicator (KPI) and ROI measurement and change management.
- **Market Understanding:** Pando exhibits a strong alignment with several key trends in the TMS market. This includes increasing usage of various AI techniques, a focus on improving the speed-to-value and ROI of TMS solutions, and sustainability and the circular economy.

### *Cautions*

- **Marketing Execution:** Pando trails other vendors in this Magic Quadrant in brand name recognition and familiarity with its product. Although its attendance at industry events was on par, Pando had lower-than-average customer interest, based on Gartner inquiry volume and other measured data search trends.
- **Geographic Strategy:** Pando has started to grow its presence outside Asia, but the majority of its customer base remains there. Potential customers outside of Asia should evaluate Pando's ability to support their needs from a sales and support standpoint.
- **Overall Viability:** Pando is one of the smallest vendors in this Magic Quadrant, with respect to TMS customers and revenue. It also has a smaller number of net new TMS



customers among the vendors in this research. Potential customers should evaluate Pando's growth and profitability to determine whether they are comfortable with its position and viability in the market.

## SAP

SAP is a Leader in this Magic Quadrant. SAP Transportation Management (SAP TM) optimizes freight procurement, transportation planning, execution and settlement. SAP's operations are geographically diversified. Its clients are mainly larger enterprises from consumer products, retail, logistics service providers, mill products and mining, chemicals, and wholesale distribution industries.

SAP delivered innovations and developments in product usability, providing new GenAI capabilities, such as a conversational planning tool and an intelligent cargo receipt to automatically create cargo documents for inbound transportation. SAP's roadmap includes new capabilities to enhance integrations among its TMS, GTM and WMS products and other collaborative capabilities through the leverage of its Logistics Business Network product.

### *Strengths*

- **Market Understanding:** SAP demonstrates strong comprehension of critical trends that impact the choices of TMS purchasers, bringing these ideas into its product development. Capabilities related to trends such as the convergence of logistics, labor changes, process digitalization through operations silos and disruptive automation technologies, such as agentic AI, are a large portion of the SAP TM product roadmap.
- **Marketing Execution:** SAP is one of the most well-known brand names globally, and supply chain organizations have a high degree of familiarity with its TMS product. Its RISE with SAP and GROW with SAP programs, bundling SAP TM with other SAP products, are successful.
- **Operations:** SAP remains as one of the strongest vendors in this Magic Quadrant with regard to global solution integrators and partner ecosystems. It has numerous partners in all major regions, as well as many global partners.

### *Cautions*

- **Customer Experience:** SAP's service-level agreement (SLA) for uptime availability is below average, when compared with other vendors in this Magic Quadrant. In addition, it does



not provide buyers with the flexibility to choose their pricing model, nor does it offer a trial or pilot period.

- **Sales Execution/Pricing:** Although SAP TM continues to have sales momentum through bundles such as RISE with SAP, its pricing and implementation times are higher than its peers.
- **Sales Strategy:** Although SAP TM benefits from the global reach and sales strategy of the SAP brand, SAP's focus remains on selling SAP TM as a solution mostly to customers in the SAP ecosystem.

## Shipsy

Shipsy is a Niche Player in this Magic Quadrant. Shipsy's Transportation Management System is broadly focused on supporting domestic and international transportation movements through the combination of modules to plan, procure and execute transportation. Shipsy's operation is geographically diversified, and Asia, the Middle East and Africa are its main markets.

Shipsy's clients tend to be small-to-large enterprises operating in industries such as 3PL and logistics service providers, retail, and consumer products. Recent changes to TMS include enhancements to cross-border capabilities, the addition of an AI chatbot and enhanced business intelligence (BI) views for different personas.

### *Strengths*

- **Market Understanding:** Shipsy has demonstrated strong comprehension of trends that impact the choices of TMS purchasers and their expectations of TMS functionality, including sustainability, GenAI and platform integration.
- **Innovation:** Shipsy dedicates a larger-than-average portion of its revenue to its R&D, making innovation one of its strengths. Shipsy also offers frequent releases of its roadmap for customer insight and awareness.
- **Sales Execution and Pricing:** Although it is one of the smaller vendors in terms of total number of TMS customers, Shipsy has one of the highest customer growth rates in this Magic Quadrant and is expanding beyond its home region.

### *Cautions*

- **Marketing Execution:** Shipy is relatively new to the mature TMS market; therefore, its brand awareness in major TMS markets such as North America and Europe remains low, compared with its peers in this Magic Quadrant.
- **Overall Viability:** Shipy is one of the smallest vendors in this Magic Quadrant in terms of number of customers and revenue, being a newer entrant to the market. It is also one of the few that were not profitable during the previous year.
- **Geographic Strategy:** Shipy has high penetration in Asia, the Middle East and Africa. Although it has shown its commitment to expanding beyond these, its growth rate in other regions, such as North America and Europe, has been slower than other vendors in this Magic Quadrant. The vendor also has few dedicated sales resources and offices in these critical regions.

## Shipwell

Shipwell is a Visionary in this Magic Quadrant. Shipwell TMS offers all core capabilities and the automation of workflows in multiple modes of transportation. It also has transportation RFP, load optimization and analytics, while providing real-time visibility via a large integrated carrier network. Shipwell primarily operates in North America, with some presence in other regions.

Its customers are SMBs in the food and beverage, manufacturing, consumer packaged goods (CPG), and retail industries. Recent developments include enhancements to visibility in air and Internet of Things (IoT)/telematics, along with GenAI assistant enhancements for shipment status, creating order and technical questions, among other areas.

### *Strengths*

- **Innovation:** Shipwell has demonstrated a commitment to its TMS solution and continues to have a robust product roadmap for future innovation. It invests a higher-than-average percentage of its TMS revenue into R&D, compared with other vendors in this Magic Quadrant.
- **Offering (Product) Strategy:** Shipwell focuses on the improvement of its already differentiated UX. It also continues to focus on differentiating its TMS product with embedded visibility and AI functionality.
- **Sales Execution/Pricing:** Shipwell has demonstrated strong growth in the number of customers and revenue year over year. It had one of the top customer volume growth

year over year of all vendors in the Magic Quadrant.

### *Cautions*

- **Geographic Strategy:** Shipwell's expansion of customers outside North America remains minimal, compared with other vendors in this Magic Quadrant. The international functionality of the TMS solution is not as advanced as other vendors in this research. Organizations seeking a global TMS solution should carefully consider the vendor's capabilities to implement and support them outside North America.
- **Overall Viability:** Shipwell is one of few vendors in the Magic Quadrant that was not profitable in the previous year. Potential customers should evaluate Shipwell's growth and profitability to determine whether they are comfortable with its position and viability in the market.
- **Market Responsiveness:** Shipwell has a lower customer retention rate and has completed a less-than-average percentage of the most recent annual roadmap, through the research period of 2024 for this research, than other vendors in this Magic Quadrant. The current available functionality, along with the roadmap and timing of international and other complex functionality, does not meet the needs of organizations shopping for a single, global TMS solution.

### **Tesisquare**

Tesisquare is a Niche Player in this Magic Quadrant. Its TMS, Tesi TMS, is part of a broader supply chain application portfolio offering collaboration capabilities that connect stakeholders through a common data hub for transportation management through its Tesisquare Platform. Tesisquare's customer base is mainly in Europe; however, the vendor is expanding in other regions, such as North and South America.

Tesisquare's clients tend to be small-to-large enterprises operating in industries such as the retail, grocery, food and beverage, consumer products, fashion, and luxury industries. Recent enhancements in the TMS include a virtual assistant leveraging GenAI to improve the end-user experience, data recognition capabilities for the recognition and validation of documents, and improvements to its budget forecasting module.

### *Strengths*

- **Market Understanding:** Tesisquare showed a thorough knowledge of trends in the TMS market and end-user challenges, such as an increase in automation capabilities, an

extension of visibility across the entire supply chain and support for sustainable transportation options.

- **Offering (Product) Strategy:** Tesisquare remains focused on providing a modular and extensible product, leveraging partnerships with other providers to improve logistics execution movements.
- **Overall Viability:** Tesisquare demonstrates longstanding financial health as an organization, with more than 30 years in the market. The company has increased its TMS revenue and its investing to grow both organically and through acquisitions.

### *Cautions*

- **Marketing Strategy:** Tesisquare has low visibility in the TMS market, with a lower-than-average percentage of revenue dedicated to marketing. This may inhibit its growth, compared with other vendors in this Magic Quadrant.
- **Geographic Strategy:** Tesisquare has high penetration in Europe, especially in Italy. Although it is starting to expand outside Europe, its presence in other regions is smaller than other vendors in this Magic Quadrant.
- **Sales Execution/Pricing:** Despite its large customer base, Tesisquare customer growth in the previous 12 months was at the low end, compared with other niche vendors in this research.

### **TMSfirst**

TMSfirst is a Niche Player in this Magic Quadrant. Its product, TMSfirst, is focused primarily on providing global, multimodal transportation management, with complementary solutions for procurement and visibility. TMSfirst's operations are mostly based in North America. Its customers are primarily based in North America, but it has clients in all major regions. Its customers tend to be larger enterprises with a focus in chemicals and plastics, oil and energy, retail, high-tech, and automotive.

Recent or planned innovations include in-transit updates with proactive alerts for delays, dynamic pricing based on capacity and demand, carrier portal with self-service tools, and carbon footprint calculation and optimization.

### *Strengths*

- **Sales Strategy:** TMSfirst has dedicated sales resources for specific industries and verticals, leverages sales partnerships with resellers, and its sales/value engineers partner closely with potential customers to understand requirements. Its philosophy is to keep potential customers engaged throughout the sales cycle.
- **Operations:** TMSfirst provides customers with options regarding the timing of updates and new releases and formal programs to support KPI and ROI measurement and change management. It also has several partnerships with implementation partners to provide potential customers with options and support globally.
- **Sales Execution/Pricing:** TMSfirst provides customers with flexibility on selecting their preferred pricing model and offers potential customers a trial or pilot period at no cost. It also offers additional support to potential customers via business case development assistance, ROI projections and hands-on access to its solution for users to assess its UX and usability.

### *Cautions*

- **Market Understanding:** TMSfirst did not exhibit the same level of alignment with TMS market trends as other vendors in this Magic Quadrant. Although it emphasizes AI, it lacked the same level of focus in other areas, such as sustainability and logistics convergence.
- **Product or Service:** TMSfirst provides a high percentage of core and extended TMS functionality, but lacks the depth of product capabilities as other vendors in this Magic Quadrant. Potential customers will need to determine whether their transportation complexity is a good fit for the capabilities provided by TMSfirst.
- **Marketing Execution:** TMSfirst trails other vendors in this Magic Quadrant in brand name recognition and familiarity with its product. It has a limited social media presence, and it primarily attends industry events with a focus on oil, gas and chemical industries. The lack of brand awareness and more narrow industry focus may limit its growth potential.

### **Uber Freight**

Uber Freight is a Challenger in this Magic Quadrant. The Uber Freight TMS mainly focuses on self-service transportation management technology for shippers. Although Uber Freight's operations are predominantly based in North America, it has a growing presence in other regions. A majority of its clients are SMBs, but it does support large enterprises.

Its customers are across industries with a focus on consumer products, food and beverage, chemical, retail, automotive, and industrial manufacturing. Recent innovations include Insights AI for enhanced experience and Uber Freight Exchange's spot and contract tools.

### *Strengths*

- **Sales Strategy:** Uber Freight's sales strategy emphasizes customized, flexible pricing models that are tailored to individual customer needs and are aligned with clients' strategic goals. It is increasing its sales resources and has displayed decent growth, compared with other vendors in this Magic Quadrant.
- **Market Responsiveness/Record:** Uber Freight TMS has a strong track record for supporting customers. Uber has demonstrated that it delivers on outcome-based objectives and metrics, and has above-average customer retention, compared with other vendors in the Magic Quadrant.
- **Innovation:** Uber Freight has shown enhanced AI capabilities for analytics and actionable insights and for spot pricing and tendering. Its R&D spending is above average.

### *Cautions*

- **Geographic Strategy:** Despite its growth in Europe, Uber Freight lags behind other vendors in that market. Uber Freight's footprint with sales resources and partners in key regions is limited.
- **Vertical Strategy:** Uber Freight lacks significant vertical strategy differentiation, which may limit its scalability for large enterprises.
- **Operations:** Uber Freight TMS has below-average numbers for implementation partners and office locations, compared with other vendors in this Magic Quadrant. Potential customers should evaluate its resources and its ability to support implementations outside North America, because Uber Freight has historically performed most of its own implementations.

## **vTradEx**

vTradEx is a Niche Player in this Magic Quadrant. Its TMS, eLOG TMS, is part of a broader logistics product suite that includes order management, transportation management, route optimization, warehouse management and some yard management capabilities. vTradEx's

operations are predominantly based in China; however, the vendor has a growing presence in other parts of the world.

vTradEx's clients tend to be larger enterprises from many industries, including industrial manufacturing, high-tech, consumer products, logistics service providers, pharmaceutical, automotive and retail. vTradEx's recent innovations include system security enhancements, integration with visibility providers, multilingual support and other internalization improvements to improve the end-user experience.

### *Strengths*

- **Market Understanding:** vTradEx has demonstrated strong comprehension of critical trends that affect the choices of TMS purchasers, such as digital transformation and AI applied to automation and sustainability.
- **Business model:** vTradEx is well-positioned in an emerging TMS market, such as China, with a platform that processes more than 4 million orders per month and connects more than 1.5 million drivers. Its strategy of seeking new partnerships should accelerate expansion to new markets.
- **Operations:** vTradEx has cultivated a strong partnership ecosystem that continues to expand. It has numerous partners in all major regions, as well as many global partners.

### *Cautions*

- **Innovation:** vTradEx did not exhibit the same level of innovation and product roadmap vision as other vendors in this Magic Quadrant. Potential customers should evaluate whether the company's TMS roadmap fully aligns with their future needs.
- **Geographical Strategy:** Although vTradEx is trying to expand outside its home region through new partnerships, its presence in other regions is still small, compared with other vendors in this Magic Quadrant.
- **Marketing Execution:** vTradEx has been mostly focused in their local market and its international expansion has just begun. Its brand recognition outside China is low, compared with its peers.

## 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

- Aptean (3T Logistics)
- Pando
- Tesisquare
- TMSfirst
- vTradEx

## Dropped

- Blume Global was dropped, because Gartner was unable to confirm that it met the inclusion criteria.
- One Network Enterprises was dropped, because it was acquired by Blue Yonder.

# Inclusion and Exclusion Criteria

The inclusion criteria for this Magic Quadrant has had some changes from previous years. These changes included:

- Removal of the Customer Interest Indicator (CII)
- Increase in the number of current live TMS customers from 30 to 50
- Increase in the number of current live TMS customers outside a vendor's home region from 5 to 10
- Increase in the number of new TMS customers outside a vendor's home region in the previous 12 months from 1 to 2



All of the following TMS solution capabilities must have been commercially available (in general availability) as of 1 October 2024.

To qualify for inclusion, providers need the following.

**TMS product:**

- Availability as a stand-alone, self-service technology application, used independently of other products or services (including outsourced or managed services) offered by the vendor.
- It must be a credible, holistic, multimodal TMS technology product that natively supports all mandatory capability features (freight sourcing and procurement, planning, execution, settlement, visibility, and analytics).
- It must be a credible, holistic, multimodal TMS technology product that natively supports at least three common capability features (appointment/dock scheduling, private fleet vehicle routing and scheduling/dispatching, parcel optimization and manifesting, transportation modeling, transportation forecasting, and 3D load building).
- The TMS must support at least seven of the following transportation modes: truckload (TL), less-than truckload (LTL), private fleet, dedicated fleet, parcel, air, ocean, intermodal and rail. Gartner will not consider stand-alone solutions in any of these areas.
- The TMS must be available commercially via cloud deployment. This can be achieved with an offering of one or a combination of single tenant or multitenant cloud.

Vendor momentum and viability criteria based on revenue, subscription or customer growth (all revenue numbers must be reported in USD constant currency). The vendor must meet one of the following:

- At least \$10 million TMS technology revenue for the previous fiscal year, comprising license and/or subscription fees. Revenue must come from stand-alone technology sales to TMS customers only and not from other products, services or implementation fees.
- A three-year compound annual customer and revenue growth rate of at least 20% from stand-alone TMS technology sales to TMS customers only.

Current TMS technology customers (the definition of a customer is a single legal entity paying for stand-alone TMS technology). The vendor must meet all the following criteria:

- At least 50 live TMS technology customers.
- At least 10 new named (new logos) TMS technology customer deals sold in the previous 12 months.
- At least 10 live TMS technology customers headquartered outside the vendor's home geographic region.
- At least two new named (new logos) TMS technology customers headquartered outside the vendor's home region during the previous 12 months.
- The vendor must have TMS technology customers in at least two of the following geographic regions: North America; South America; Europe, the Middle East and Africa (EMEA); Australia and New Zealand; and Asia.
- The vendor must have existing or new TMS technology customers in at least seven industries. Examples include 3PLs, government, healthcare providers, manufacturing and natural resources, retail, energy and utilities, and wholesale.

## Evaluation Criteria

### Ability to Execute

Gartner analysts evaluate vendors on the quality and efficacy of the processes, systems, methods or procedures that enable provider performance to be competitive, efficient and effective, and to positively affect revenue, retention and reputation. Vendors are also evaluated on how well their efforts to market and communicate their vision for their product resonate with the market. Ultimately, they are judged on their ability and success in capitalizing on their vision.

**Product or Service:** This criterion looks at the core technology product that competes in and or serves the defined market. This includes current product capabilities, quality, feature sets, etc. Focus is placed on differentiated TMS technology products, including support for mandatory and common capabilities. The overall breadth of capabilities and the depth of product functionality are also important factors.

**Overall Viability:** This criterion includes an assessment of the organization's overall financial health, as well as the financial and practical success of the business unit. It considers the

likelihood that the organization will continue to offer and invest in the product, as well as the product position in the current portfolio. Consideration is given to the year-over-year product revenue growth, vendor/business unit profitability, the amount of revenue invested in research and development for the TMS product, and any changes in organizational structure or key personnel.

**Sales Execution/Pricing:** This criterion looks at the vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel. Consideration is given to the clarity and competitiveness of the vendor's pricing model for TMS technology, the number of net new TMS technology deals, and customer feedback on the quality of sales-related activities.

**Market Responsiveness:** This criterion looks at a vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the provider's history of responsiveness to changing market demands and its track record for TMS technology.

**Marketing Execution:** This criterion looks at the clarity, quality, creativity and efficacy of programs designed to deliver the vendor's message and influence the market, promote the brand, increase product awareness, and establish positive identification in customers' minds. This "mind share" can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities. Consideration is given to a vendor's social media presence, range of programs and approaches to increase its TMS technology's product profile, and overall brand awareness of the vendor's product.

**Customer Experience:** This criterion covers the products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary tools, customer support programs, availability of user groups, SLAs, etc. Consideration is given to customer feedback on sales experience with the vendor and overall customer satisfaction with the TMS technology product.

**Operations:** This criterion looks at the ability of the vendor to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

Additional consideration is given to the vendor’s implementation resources and tools to support its TMS technology product.

Criteria for product or service, overall viability, market responsiveness, customer experience, and operations are weighted high. These are often key drivers for vendor selection with potential buyers. Buyers express interest in product functionality, the vendor’s ability to deliver against objectives, overall satisfaction with the vendor, the vendor’s viability, and the vendor’s ability to provide implementation, support and consistent delivery.

Criteria for sales execution/pricing and marketing execution are given medium weight. This ensures that vendors have sufficient investment and growth in their TMS products. It also ensures a diverse set of customer requirements, with a track record of maintaining long-term customer relationships, and the ability to build brand-name recognition, while using multiple brand channels, due to an increasingly competitive market.

**Table 1: Ability to Execute Evaluation Criteria**

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

Source: Gartner (March 2025)

# Completeness of Vision

Gartner analysts evaluate vendors on their ability to convincingly articulate logical statements about current and future market direction, innovation, customer needs and competitive forces. Vendors are evaluated on their ability to articulate — to Gartner and 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 TMS market. Ultimately, vendors are rated on their understanding of how market forces can be exploited to create opportunities for the vendor.

**Market Understanding:** This criterion considers a vendor’s ability to understand customer needs and translate them into products. Vendors that show a clear vision of their market — they listen and understand customer demands — can shape or enhance market changes with their added vision. Consideration is given to a vendor’s alignment with top trends, thought leadership and market knowledge, and competitive differentiators.

**Marketing Strategy:** This criterion looks for clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements. Consideration is given to overall positioning statements and strategies to target specific market segments by addressing unique industry, geographic or size/complexity requirements.

**Sales Strategy:** This criterion considers whether the vendor has a sound strategy for selling that uses the appropriate networks. This includes direct and indirect sales, marketing, service, communication, and partners that extend the scope and depth of market reach, expertise, technologies and the customer base. Consideration is given to the number of TMS technology-focused sales resources, pricing models, cost elements, sales channels and sales partnership strategies.

**Offering (Product) Strategy:** This criterion looks at a vendor’s approach to product development and delivery that emphasizes market differentiation, functionality, methodology, and features as they map to current and future requirements. Consideration is placed on differentiated product capabilities, new or planned features, and the vendor’s overall partnership/ecosystem development strategies.

**Business Model:** This criterion looks at the design, logic and execution of the vendor’s business proposition to achieve continued success. Consideration is given to the vendor’s

business and TMS technology product value proposition and commitment to the TMS product.

**Vertical/Industry Strategy:** This criterion considers a vendor's strategy to direct resources, skills and products to meet the specific needs of individual market segments, including verticals. Additional consideration is given to the number of industries with active and new TMS technology customers and differentiated TMS technology product capabilities for specific industries/verticals.

**Innovation:** This criterion looks at direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes. Consideration is given to the level of investment in research and development, quality of the product roadmap, and execution and delivery of the vendor's previous TMS technology product roadmap.

**Geographic Strategy:** This looks at the provider's strategy to direct resources, skills and offerings to meet specific needs of geographies outside the "home" or native geography, directly or through partners, channels and subsidiaries, as appropriate for that geography and market. Additional consideration is given to the number of regions and offices, dedicated sales resources, and countries with existing and new TMS technology customers.

Criteria for market understanding, offering (product) strategy, innovation and geographic strategy are weighted high. In terms of vision, these criteria are the most impactful in a buyer's decision. Buyers are looking for vendors that understand the trends and changing dynamics in transportation, offer depth and breadth in their product portfolios, have strong product roadmaps, and support their business needs across a diverse set of geographic locations.

Criteria for marketing strategy and sales strategy are given medium weight. This is to ensure that vendors have a strategy to improve market visibility, provide clear and consistent messaging, and have adequate sales channels and resources to continue to grow their businesses.

Criteria for business model and vertical/industry strategy are weighted low. Vendors should show the ability to adapt or evolve their business model as needed, that this market is significant to their overall business, and that they have consistent vertical focus. These are rated low because TMS buyers do not often consider these criteria as important in their evaluation of vendors and products.

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (March 2025)

## Quadrant Descriptions

### Leaders

Leaders have the ability to execute their vision through their TMS products and demonstrate solid business results in the form of revenue and customer growth. Leaders have significant successful customer deployments in a wide variety of industries, across multiple geographies, and with multiple proofs of deployments. They offer functionally rich solutions that are especially beneficial to larger organizations with a high level of transportation complexity. Leaders should be able to support global transportation operations and are often the vendors against which other providers measure themselves.

## Challengers

Challengers are often larger than Niche Players and demonstrate higher volumes of new business. They have the size and product capabilities to compete worldwide, but they might not be able to execute equally well in all geographic areas. They often achieve high customer experience satisfaction. They may lack a strong functional vision or may have failed to deliver compelling new product enhancements during the past 12 months. Challengers may lag behind Leaders in terms of their product roadmaps.

## Visionaries

Visionaries are typically seeking to deliver a unique or differentiated approach to the market. They may be considered thought leaders and tend to be on the leading edge of emerging concepts and technologies. Visionaries may have a smaller number of live customers and/or lack a substantial market presence. These vendors usually have deficiencies in their Ability to Execute, particularly in areas such as market visibility, growth, track record or operations. Vendors in this category can be established TMS vendors that have yet to mature into leading positions in the market, or they can be innovative vendors that are more specialized, with unique views of where the market is heading.

## Niche Players

Niche Players offer a TMS product that lacks breadth and depth of capabilities, or may not demonstrate the ability to consistently handle deployments across multiple geographies, or may lack strong sales. These vendors may offer a complete TMS for fewer specific industries, but face challenges in one or more of the areas necessary to support cross-industry requirements. They may have an inconsistent implementation track record or may lack the ability to support the requirements of large or higher transportation complexity enterprises. Even so, Niche Players sometimes offer the best solutions for the needs of particular organizations, considering the price/value ratio of their solutions.

## Context

Gartner continues to see expansion in the sophistication, functional breadth and depth, and geographical scope of the broader TMS market. However, as shipper requirements grow, notable differences remain across solutions. These differences include the capability to address the most complex transportation requirements, a vendor's ability to deploy and



support outside its home region, and the TMS's native support for modes other than over the road. In addition, the challenges that organizations have faced in orchestrating end-to-end processes have increased the importance of transportation and supply chain execution convergence.

This research focuses on solutions that address the needs of companies that routinely use a wide variety of shipping modes, such as full truckload (FTL), less than truckload (LTL), intermodal, rail, air, ocean, small package, and private or dedicated fleets. The emphasis in this research is on solutions that support primarily for-hire transportation, where shippers contract with carriers for freight movements. This research does not focus on specialized solutions targeted at fleets, although a TMS vendor's ability to support a fleet is evaluated. Likewise, parcel labeling and manifesting are evaluated as part of a TMS vendor's capabilities; however, stand-alone parcel solutions are not included in this research.

All solutions in this Magic Quadrant support, at a minimum, the standard and must-have capabilities previously outlined and many support multiple optional capabilities. All solutions in this Magic Quadrant have the capability to support organizations of various sizes (in terms of volume and freight spend), geographies and levels of transportation complexity. Vendors may be better suited for certain geographies and complexity levels.

Differentiation among solutions includes factors such as:

- Breadth of TMS functionality beyond standard and must-have capabilities; some solutions may support most or all optional TMS capabilities.
- Depth of TMS functionality, particularly in functionality for transportation planning and optimization.
- UX that is increasing in importance to all organizations, but particularly those classified as small and midsize shippers.
- Analytics that go beyond standard reporting to include predictive and prescriptive capability.
- Sustainability capabilities, including emissions and carbon calculations, and the ability to provide meaningful data and reporting.
- Partnership ecosystems that include complementary transportation technologies and capabilities, as well as implementation resources.

- Global reach, in terms of ability to support global operations across modes and geographies, and in ability to provide implementation and support services.
- Convergence strategies that include transportation, supply chain execution and a vision for end-to-end supply chain convergence.

## Market Overview

The TMS market has continued to evolve during the past 12 months. Gartner still sees high levels of interest from prospective buyers for TMS technology applications. This includes organizations that have previously relied on legacy, homegrown applications, and those with on-premises solutions from vendors. In addition, a strong interest from organizations that have never utilized a TMS solution or that previously relied on an outsourced transportation management provider remains.

### Vendor Acquisition Activity

TMS technology acquisition continued in 2024 and will continue to impact the TMS market for potential buyers. Körber completed its acquisition of MercuryGate in October 2024. Blue Yonder completed its acquisition of One Network Enterprises in August 2024.

In addition to such acquisitions, TMS vendors continue to evaluate other solutions to enhance and extend their existing TMS capabilities or to support supply chain execution convergence strategies. Relevant transactions by TMS vendors in 2024 include Blue Yonder's acquisition of flexis AG to provide additional routing and scheduling, fleet maintenance, and telematics capabilities.

The TMS market continues to be highly fragmented, due to the presence of many vendors, particularly in the U.S. and Europe. Several vendors have been offering solutions for many years, but newer vendors continue to expand their share of the market.

There are five new entrants — Aptean (3T Logistics), Pando, Tesisquare, TMSfirst and vTradEx — in this year's Magic Quadrant. Aptean's product, 3T, returns to the Magic Quadrant after failing to meet the inclusion criteria in the previous Magic Quadrant. Two vendors from last year's Magic Quadrant (Blume Global and One Network Enterprises) were dropped this year. One Network was dropped due its acquisition by Blue Yonder, while Blume Global was dropped because Gartner was unable to confirm that it met the inclusion criteria. There was

some movement in the quadrants based on the needs of shippers and based on the influx of the five new vendors.

TMS vendors are investing in expanding the breadth and depth of their TMS products, as well as their global footprint. This evolutionary expansion improves the value proposition for a TMS. Enhancements in freight procurement; analytics; AI/machine learning (ML); automation; support for more modes of transportation (e.g., intermodal, parcel, rail, air and private/dedicated fleets); and visibility have added to the value of a TMS.

## **Impactful Trends**

Continued interest in the TMS market has led to a variety of trends that will affect prospective buyer decisions. Organizations that are evaluating TMS solutions or that have plans to do so in the near future should consider the relevance of these trends. These include increasing capabilities for supporting sustainability goals and initiatives, shifts toward a microservices architecture, and API connectivity linking to internal and external applications.

The use of AI/ML has become commonplace in TMS technology solutions — from optimization capabilities to predictive ETAs. However, buyers should be aware of how TMS vendors may use GenAI technologies within TMS applications. GenAI pilots and testing are being performed by many vendors with use cases to support training, reporting and data visualization, and self-service configuration, as examples.

Agentic AI is another area in which vendors have either deployed offerings or are piloting its use in various use cases. Agentic AI refers to goal-driven software entities that have been granted rights by the organization to act on its behalf to autonomously make decisions and take action. These entities use AI techniques — combined with components such as memory, planning, sensing, tooling and guardrails — to complete tasks and achieve objectives. Early examples in TMS include use in freight sourcing and procurement and data insights.

Another continuing trend is the development of complementary technology ecosystems by TMS vendors. As advanced as some TMS solutions are, many still have gaps or lack depth of functional capability in areas of increasing interest to prospective customers. These include more advanced parcel capabilities and real-time transportation visibility, for example. TMS vendors have also focused on increasing their implementation and solution integration partner ecosystems.

In response, TMS vendors have become more receptive to building an ecosystem of complementary technologies and partnerships with vendors that offer these types of solutions or capabilities. Organizations that are evaluating potential TMS vendors should consider their current transportation technology strategy and determine whether additional solutions and capabilities are needed beyond a TMS. If that is the case, a closer examination of a potential TMS vendor's ecosystem should become a priority.

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## ⊕ Evidence

## ⊕ Evaluation Criteria Definitions

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