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Supply Chain Planning Technology Value Matrix 2025

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The Bottom Line

Supply Chain Planning (SCP) is entering a new phase as organizations continue to face growing disruptions, complex global networks, and rising pressure to balance cost efficiency with service. Visibility alone is no longer sufficient. Organizations need systems that can connect planning to real-time action, integrating forecasting, scenario modeling, and execution to manage volatility. In response, vendors are delivering modular, API-first architectures, expanding partnerships with data platforms, and advancing AI that moves beyond traditional forecasting to directly engage with workflows and decisions. Despite this progress, adoption gaps remain due to legacy integration challenges, data quality limitations, and the need for greater transparency into AI-driven recommendations. To compete in 2025 and beyond, organizations must invest not just in smarter planning but in unified architectures that combine data, decision-making, and execution into one platform.

Market Overview

Organizations today face escalating disruptions across increasingly complex supplier networks. While many track supplier risk, few have structured plans to respond to events such as tariff changes, geopolitical instability, factory shutdowns, or evolving ESG requirements tied to global trade. As supply chains stretch across multiple tiers and regions, visibility alone is insufficient. Organizations need tools that enable proactive responses to disruptions in real-time. This has increased interest in what-if scenario modeling and contingency planning capabilities to evaluate alternative sourcing, routing, and fulfillment strategies.

Organizations are moving beyond traditional supplier risk tracking and visibility tools. The focus is now on real-time scenario modeling, execution alignment, and proactive disruption management.

At the same time, organizations struggle to balance cost efficiency and service levels. Organizations that over-optimize for cost often maintain lean inventories, leaving them vulnerable to supplier delays, demand spikes, port congestion, or transportation failures. Others inflate inventory to mitigate risk, which leads to higher carrying costs and reduced margins. Regardless of strategy, there is a growing recognition that agility has become the benchmark for planning maturity. Adding to these pressures is a persistent disconnect between planning and execution. Many organizations can identify the right plan but lack the infrastructure to act in real time. As a result, demand is rising for tighter integration between SCP and execution systems, particularly manufacturing execution (MES), warehouse management (WMS), and transportation management (TMS), to enable more responsive and resilient supply chain operations.

To meet these expectations, vendors are delivering architectural and functional innovation aimed at helping organizations become more agile, data-driven, and resilient. Composability is now table stakes as some vendors now embrace modular, API-first architectures that support flexible deployment models, enabling organizations to integrate, scale, and evolve their planning environments with greater speed and less disruption. For example, companies can deploy a lead time prediction model or connect to external datasets without requiring extensive IT involvement. By reducing technical friction, modular SCP architectures help organizations respond faster to change, adopt emerging technologies more easily, and accelerate time to value.

Vendors are partnering with cloud data platforms like Snowflake and Databricks to enhance planning accuracy and responsiveness. These integrations allow organizations to analyze data where it resides, blending structured and unstructured sources.

Many vendors have also formed partnerships with cloud data platforms such as Snowflake and Databricks to strengthen planning accuracy and responsiveness. These partnerships enable customers to analyze data where it resides and blend structured and unstructured sources,

including inventory records, weather data, shipment statuses, third-party logistics feeds, and geopolitical risk signals, into their planning models. This supports more effective scenario modeling, improves visibility into external risk factors, and enhances the overall quality of planning decisions. As a result, data governance and integration have become central priorities during SCP deployments, given that poor data quality is still one of the most common and costly barriers to success.

In parallel, vendors are investing in broader supply chain functionality through acquisitions and portfolio expansion, bringing capabilities such as manufacturing, logistics optimization, and global trade management in-house. These advancements help customers close the gap between planning and execution, simulate disruption scenarios more effectively, and move away from fragmented tools that slow decision-making. By unifying these capabilities on a single platform, vendors give customers the tools to adapt to volatility, balance cost and service levels, and operate more quickly and confidently across increasingly complex supply networks.

While AI adoption in supply chain planning is gaining momentum, it is essential to recognize that machine learning has been used in this space for years, particularly in areas like demand forecasting, safety stock optimization, and anomaly detection. What is changing now is the evolution toward more dynamic and interactive applications of AI, where agents are not just delivering insights but are actively engaging with planning workflows, proposing adjustments, initiating simulations, and triggering real-time actions based on current supply, demand, or logistics conditions. Unlike traditional machine learning models that operate in the background, these agents interact directly with users and systems, helping to close gaps between analysis and execution with minimal human intervention.

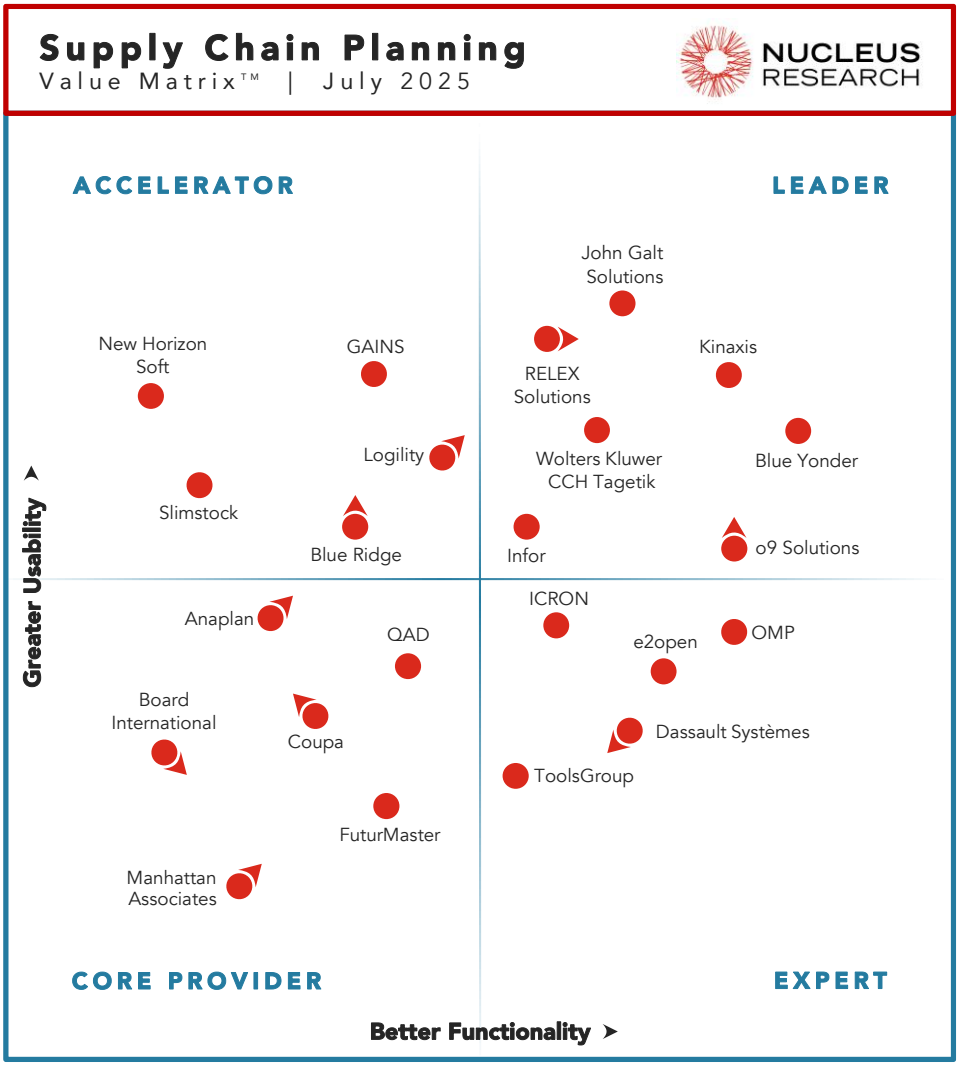
Yet as these capabilities grow in sophistication, a persistent barrier remains: the ability of organizations to absorb and operationalize them. Nucleus has found that while some organizations, particularly those in the manufacturing and retail industries, demonstrate high levels of AI readiness, others remain cautious. This hesitation is often rooted in a lack of internal expertise, integration challenges with legacy systems, and concerns over the cost and complexity of implementation. Some organizations attempt to embed AI directly into existing planning workflows, which can be difficult without modern APIs or modular architectures. Others pursue bolt-on approaches, layering AI tools on top of disconnected systems, often leading to inconsistent data flow and limited decision automation. These integration paths can increase

AI in SCP is evolving from passive forecasting tools to agentic AI systems that propose, simulate, and trigger actions autonomously. However, adoption is uneven due to internal capability gaps, legacy system constraints, and trust concerns.

To lower barriers, vendors are introducing low-code/no-code agent builders and prioritizing explainability to build user confidence.

deployment friction and limit the effectiveness of AI, mainly when data quality and system interoperability are not addressed upfront. To lower barriers to adoption, some vendors have introduced low-code and no-code "Agent Builder" tools, which allow non-technical users to create agents by combining contextual data with predefined logic and workflows. These tools are part of a broader effort to make advanced AI more accessible to supply chain teams without requiring deep technical resources. Still, trust and explainability remain essential. Organizations expect visibility into the reasoning behind AI recommendations, including the data inputs, assumptions, and business rules involved. Transparency is no longer optional; it is critical to building confidence and encouraging widespread use.

Composable, API-first architectures are becoming the standard, reducing deployment friction and enabling faster tech adoption.



To remain competitive in 2025 and beyond, organizations must invest not just in more innovative planning but in architectures that connect insight to action. The era of isolated planning tools is ending; only those

who can unify data, logic, and execution across the supply chain will adapt fast enough to meet tomorrow's volatility.

The Nucleus Research Supply Chain Planning Technology Value Matrix provides an assessment of the market based on how vendors deliver value to customers through the usability and functionality of their solutions (Nucleus Research x222 – Understanding the Value Matrix, December 2023). The research is intended to deliver a relevant snapshot of the Marketing Automation technology market, rather than serve as an empirical ranking of the vendors. The arrows indicate each vendor's perceived momentum, which is informed through conversations with end users, recently released capabilities, features, and other areas of investment.

The Nucleus Research Supply Chain Planning Technology Value Matrix evaluates vendors based on usability and functionality, emphasizing how solutions deliver real-world value to customers.

Leaders

Leaders in the SCP Technology Value Matrix include Blue Yonder, Infor, John Galt Solutions, Kinaxis, o9 Solutions, RELEX Solutions, and Wolters Kluwer CCH Tagetik.

Blue Yonder

Blue Yonder is recognized as a Leader in the 2025 SCP Technology Value Matrix, offering integrated supply chain planning solutions that support IBP, demand, supply, inventory, and manufacturing planning. The platform combines real-time data, AI, and machine learning to synchronize supply chain operations and enable faster, more informed decisions. Built on a modern microservices architecture leveraging Snowflake for data management and Microsoft Azure for scalability, Blue Yonder provides flexibility, performance, and secure access to large datasets. Cognitive Demand Planning uses AI and machine learning to analyze historical sales, inventory, marketing activity, and even social media sentiment, helping businesses improve forecasting accuracy and proactively adjust to market changes. Blue Yonder's advanced solvers address complex, industry-specific supply planning needs across both manufacturing and retail. The broader platform also supports Control Tower, Transportation Management, Warehouse Management, Workforce Management, Order Management, and Category Management, creating an end-to-end supply chain ecosystem. The Blue Yonder Network extends customers' supply chain information and collaboration across 150K+ trading partners in 54 countries, including 20K+ logistics carriers and 49K+ suppliers. Extension enables a new level of cooperation across all levels of the supply chain. With built-in generative AI and machine learning, users benefit from intelligent, guided decision support, advanced scenario

Blue Yonder delivers an integrated SCP suite that spans demand, supply, inventory, IBP, and manufacturing planning, all built on a modern microservices architecture leveraging Snowflake and Microsoft Azure.

planning, and automation that enhances collaboration and accelerates supply chain planning across the business.

Recent updates and announcements include:

- **Agent Ops.**
  Blue Yonder introduced Agentic Ops, a suite of AI-powered digital teammates that use Large Language Models, Large Quantitative Models, and Large Visual Models to analyze supply chain data, identify root causes of disruptions, and present actionable solutions across planning, replenishment, and inventory management. Inventory Ops, part of Agentic Ops, supports scenario planning, allocation builds, and inventory position analysis, allowing users to interact with AI agents via desktop, mobile, or the Blue Yonder Orchestrator chatbot, with access available across deployment models including on-premises, private cloud, and Microsoft Azure.

Blue Yonder launched Agentic Ops, a suite of AI-powered digital agents combining LLMs, LQMs, and LVMs to proactively manage planning and inventory disruptions.

- **Pcsso Partnership.**
  Blue Yonder partnered with Pcsso to enhance Category Management with integrated trend and social insights. This provides buyers with real-time market visibility and AI-driven assortment planning based on social media signals and unstructured data.

- **New Space Planning Tools.**
  New AI-driven collaboration tools for Space Planning allow enterprise users to review, annotate, and approve planograms in real-time without needing to export documents. In contrast, mobile-based compliance tools enable store operators to validate shelf execution through photo-based analysis.

- **Return Management Improvements.**
  Blue Yonder advanced interoperability by integrating returns management, replenishment planning, and demand forecasting into a unified platform. This allowed planners to adjust inventory and space KPIs in real time based on returns trends and forecast updates.

Blue Yonder improved end-to-end planning alignment by integrating returns management with forecasting and replenishment and rolling out a unified semantic data model.

- **Data Model Update.**
  The platform's single semantic data model connects S&OE, S&OP, merchandise financial planning, supplier collaboration, and warehouse labor management. It enables near-instant adjustments to demand, capacity, and tooling requirements, reducing decision-cycle times from weeks to minutes.

Infor

Infor is recognized as a Leader in the 2025 SCP Technology Value Matrix, providing a comprehensive supply chain planning solution designed for large, complex enterprises across industries such as food and beverage, life sciences, automotive, distribution, and manufacturing. Infor SCP offers broad capabilities, including demand forecasting, sales and operations planning, inventory optimization, supply planning, capacity management, and production scheduling. The platform can operate as a standalone solution or integrate seamlessly with the broader Infor ecosystem, including Infor Nexus for multi-tier visibility and Infor Lighthouse for manufacturing execution.

Infor SCP is built for large, multi-industry enterprises and offers a broad, end-to-end planning suite spanning demand, supply, inventory, capacity, and production planning. It connects natively with Infor CloudSuite ERP and Infor Nexus.

Infor SCP also connects with Infor CloudSuite ERP, bringing together demand, marketing, and operational data to extend planning across sales, operations, and production. The system supports easy integration with third-party tools and can be configured to highlight customer-specific metrics, giving businesses greater visibility and control over their supply chain performance.

Recent updates and announcements include:

- **Infor Velocity Suite.**
  Infor launched the Velocity Suite to help customers accelerate process innovation using process mining, robotic process automation, and generative AI to diagnose inefficiencies, automate improvements, and optimize operations through a robust library of pre-built industry-specific use cases. With Infor Process Mining integrated into the Velocity Suite, users can analyze operational workflows in real time, identify bottlenecks or deviations from standard processes, and uncover business improvement areas.

- **Infor Value+.**
  Customers can use Infor Value+ solutions to automate tasks identified during the process mining phase, leveraging generative AI and RPA to eliminate manual work, increase speed, and enable consistent execution. Infor continued to scale its Industry AI portfolio, embedding generative AI directly into applications like Process Mining, Document Processor, CloudSuite Distribution, and Infor M3 to deliver one-click insights and increased process efficiency.

Infor expanded its Industrial AI portfolio by embedding generative AI into core applications such as Process Mining, Document Processor, CloudSuite Distribution, and Infor M3.

- **Industrial AI Portfolio.**
  Infor continued to scale its Industry AI portfolio, embedding generative AI directly into applications like Process Mining,

Document Processor, CloudSuite Distribution, and Infor M3 to deliver one-click insights and increased process efficiency.

- **Embedded Integration Wizards**
  Infor introduced Embedded Integration Wizards to simplify and accelerate the setup of live integrations with M3-based CloudSuites.

- **Live Synchronization.**
  The solution now supports Live Synchronization, providing real-time visibility and alignment between forecasting data and operational systems.

- **Hyperlink Forecast Insights.**
  Users can hyperlink forecast insights directly to master data and transactional records, improving navigation and streamlining decision-making processes.

- **Expanded Attribute Access.**
  Infor expanded attribute access to support over 800 M3 attributes, broadening the available data for forecasting and planning activities.

- **New Exception Management and Alerting Capabilities.**
  New Exception Management and Alerting capabilities help users quickly identify root causes and prioritize actions to improve service levels.

- **ERP Openness**
  Infor continues to support ERP openness, allowing integration with both Infor and third-party ERP systems to accommodate diverse IT environments.

Infor introduced the Velocity Suite, combining process mining, RPA, and generative AI to identify operational inefficiencies and automate resolution. This enables users to move from insight to action by diagnosing root causes and deploying prebuilt improvements tied to industry-specific workflows.

John Galt Solutions

John Galt Solutions is recognized as a Leader in the 2025 SCP Technology Value Matrix, providing end-to-end supply chain planning for industries such as food and beverage, consumer goods, high-tech, life sciences, industrial manufacturing, wholesale distribution, retail, apparel, and chemicals. The Atlas Planning Platform is an AI-powered SaaS solution built on an intuitive, low-code/no-code framework, offering fast, flexible deployments that solve complex challenges and deliver quick time to value (a previous Nucleus ROI Award winner). Atlas integrates finance, planning, and execution into a single platform to synchronize, automate, and optimize processes across the supply chain.

John Galt's Atlas Planning Platform is a comprehensive, AI-powered SCP solution that supports end-to-end planning, from S&OP to transportation and scheduling.

Core features include S&OP, demand, supply, inventory, replenishment, transportation, manufacturing, and scheduling. The platform connects internal and external data sources in real time, enhancing visibility and enabling continuous, data-driven decision-making powered by AI and machine learning. With built-in digital twin modeling, users can simulate scenarios, assess trade-offs, and optimize for service, sustainability, and financial goals. Atlas adapts to different supply chain configurations, including make-to-stock, make-to-order, retail, and manufacturing environments. Additional capabilities such as reinforcement learning for probabilistic planning, ensemble forecasting, and a GenAI-enabled virtual assistant support advanced forecasting, scenario planning, and productivity improvements. Atlas increases productivity and higher-quality decision-making and streamlines business operations through intelligent automation, decision augmentation, and streamlined workflows.

Built on a low-code/no-code architecture, Atlas enables rapid deployment and adaptation across industries.

Recent updates and announcements include:

- **Multi-Constraint Optimization.**
  Atlas now creates feasible supply chain plans by simultaneously considering all resource constraints, including production lines, labor, transportation, storage, and sustainability goals like emissions and natural resource usage.

Atlas now supports multi-constraint optimization that simultaneously accounts for production, labor, transport, and sustainability factors.

- **Expanded MEIO Capabilities.**
  Atlas now delivers a true network solve for multi-echelon inventory optimization, optimizing inventory levels across all locations and products simultaneously while considering constraints, variability, and dependencies. Atlas now goes beyond cost-only optimization of service levels to consider additional factors like emissions, miles driven, profitability, and more.

- **Embedded GenAI.**
  John Galt has embedded generative AI across Atlas, including: Context-rich data analysis using knowledge graphs, Natural language search and intelligent content generation, and Querying and extracting data insights using everyday language.

- **Galt Connect Launch**
  John Galt introduced Galt Connect, a centralized partner hub within Atlas where customers can access integrated technologies and consulting services. This hub supports solutions like transportation planning, MES, sustainability, and production scheduling.

- **Climatiq Partnership.**

The partnership will embed real-time carbon emissions tracking from Climatiq into Atlas, supporting Scope 1, 2, and 3 emissions monitoring. This will enable supply chain decisions aligned with sustainability goals and net-zero commitments.

- **Sales Channel Integration with SPS Commerce.**
  John Galt added direct access to retail and distributor data from over 1,000 retailers, including Walmart, Amazon, Target, and Kroger, delivering real-time store-level sales insights to improve omnichannel planning.

- **GenAI Decision Support.**
  The software vendor accelerated AI agent development to assist with decision evaluation, routine task execution, and real-time planning support, with explainable AI guardrails to increase trust in recommendations.

- **Atlas Deliver Updates.**
  John Galt enhanced the Atlas Deliver system to automatically release orders that meet all constraints, flag issues for rapid resolution, and improve order processing efficiency with scheduled automation. The SCP vendor also released it as a microservices-based application to streamline order-to-shipment processes, handle real-world constraints (freight rates, truckloads, container sizes), and provide advanced automation and real-time decision guidance.

John Galt embedded generative AI throughout Atlas, enabling natural language querying, context-aware content generation, and intelligent agents that support real-time planning tasks and explainable decision-making.

Kinaxis

Kinaxis is a Leader in the 2025 SCP Technology Value Matrix, providing end-to-end supply chain planning and execution capabilities for industries such as automotive, consumer products, high-tech and electronics, retail, life sciences, aerospace and defense, and industrial manufacturing. The company's primary offering, the Kinaxis Maestro Platform, is an AI-powered supply chain orchestration solution that connects planning and execution across the enterprise. Maestro combines an integrated data fabric, always-on intelligence, and an intuitive user interface to deliver real-time visibility, scenario planning, and faster decision-making. The platform spans inventory optimization, demand sensing, capacity planning, production scheduling, transportation, order management, reverse logistics, S&OP, IBP, and Control Tower functionality. Kinaxis also offers AI-driven recommendations, scenario modeling, and post-game analysis to automate routine tasks and continuously refine decision-making based on business priorities. With out-of-the-box capabilities, integration to

The Kinaxis Maestro Platform delivers end-to-end supply chain orchestration across planning and execution functions like demand, supply, inventory, order, and production.

third-party applications, and the Kinaxis Planning One package, customers can reduce latency and shorten time-to-value for new deployments

Kinaxis expanded Maestro with Databricks integration, enabling customers to analyze structured and unstructured data (e.g., IoT, social media) at scale without heavy ETL processes.

Recent updates and announcements include:

- **Maestro Platform Updates.**

  Kinaxis expanded its Maestro platform through a strategic partnership with Databricks, enabling customers to leverage Databricks' Delta Sharing and Data Intelligence Platform to process structured, semi-structured, and unstructured supply chain data at scale, improving real-time planning accuracy across diverse sources like IoT, weather, and social media. The Databricks collaboration allows Kinaxis customers to choose where and how data analysis occurs, either through native Kinaxis pipelines or directly within Databricks. This reduces the need to extract and transform external datasets, with these enhancements expected by Q3 2025.

- **Multi-Agent Framework.**

  Building on these data infrastructure improvements, Kinaxis announced its Multi-Agent Framework, which allows users to configure AI agents using simple natural language prompts, define agent behaviors, and control access to relevant datasets without developer intervention. General availability is targeted for Q4 2025. The Multi-Agent Framework is designed to increase adoption and trust by enhancing AI explainability, allowing users to understand how forecasts or alerts are generated and tailor agent actions to specific business contexts.

- **Infor Partnership.**

  Kinaxis partnered with Infor to introduce 'Kinaxis Planning One for Infor CloudSuite Industrial Enterprise, CloudSuite Automotive, and CloudSuite Aerospace and Defense,' integrating Maestro's supply chain planning with Infor LN ERP to provide discrete manufacturers with scenario planning, financial insights, and improved alignment of inventory with supply and demand. The joint Kinaxis-Infor solution enables manufacturers to simulate planning scenarios incorporating operational and financial metrics, supporting decision-making in industries like aerospace, automotive, and industrial equipment, with Kinaxis leading sales and Infor acting as a VAR focused on North America and EMEA markets.

Kinaxis launched a Multi-Agent Framework that allows users to deploy configurable AI agents with natural language, boosting explainability and user trust while supporting tailored decision-making.

- **Platform Integration Updates.**

Kinaxis further enhanced the integration of transportation management, order management, and returns management. Functionalities into its platform, significantly improving the gap between planning and execution to enable seamless end-to-end supply chain orchestration.

Kinaxis deepened the integration of transportation, order, and returns management with supply chain planning to increase alignment between planning and execution.

- **Enterprise Schedule Tool Update.**
  The software vendor introduced enhanced features for its enterprise scheduling tool that allow businesses to create and manage globally integrated production schedules, accounting for all plant layouts and enabling comprehensive, feasible, and efficient manufacturing scheduling strategies.

- **Tariff Response Solution.**
  Kinaxis launched an AI-powered tariff response solution to help supply chains adapt to disruptions with confidence.

- **Catena-X Certification.**
  Kinaxis achieved Catena-X certification, cementing its leadership footprint in the automotive value chain and demonstrating its commitment to industry standards and interoperability.

o9 Solutions

o9 Solutions is recognized as a Leader in the 2025 SCP Technology Value Matrix for its integrated and modular Digital Brain platform. The platform serves industries including consumer goods, apparel and fashion, high-tech, industrial manufacturing, medical devices, oil and gas, telecommunications, and pharmaceuticals. o9 offers industry-specific solution templates for discrete and process manufacturers, retail, apparel, luxury, automotive suppliers, and telecommunications. The platform connects core planning processes such as integrated business planning, demand and supply planning, retail planning, ESG, supplier relationship management, and revenue growth management into a single system. o9 can be deployed on any of the major cloud providers, such as Azure, GCP, AWS, and provides the scalability required for complex, data-driven operations. A key feature is the Enterprise Knowledge Graph (EKG), which builds a high-granularity digital twin of the supply chain, supporting predictive maintenance, scenario modeling, and real-time visibility across demand, supply, and inventory. o9 supports multi-LLM architecture, so agents can leverage Azure OpenAI, Gemini, or Claude—any Enterprise LLM model can be used to convert organizational knowledge into actionable insights using AI, semantic search, and automation. Recent updates include Generative AI embedded into the platform to digitize expertise,

o9's Digital Brain is a modular, AI-native SCP platform known for its Enterprise Knowledge Graph (EKG), which powers real-time visibility and granular digital twin modeling across demand, supply, inventory, and ESG.

improve plan-versus-actual analysis, and enhance real-time decision-making across supply chain operations.

Vendor updates and announcements over the last year:

- **New Analyzer AI Tools.**
  Over the last 12 months, o9 Solutions has launched its Post Game Analyzer, a next-generation tool designed to provide intelligent playback of a company's activities each cycle, helping executives and managers drive improvements in operations, change management, and workforce performance. Unlike standard BI tools that display KPIs, Post Game Analyzer combines AI-based conversational root cause analysis, value leakage stories, policy recommendations, and performance leaderboards to deliver actionable insights that enable faster decisions, ongoing learning, and improved cross-functional alignment. The solution is specifically designed to convert tribal knowledge into digitized insights, enhance supply chain data quality, and drive measurable value across operations. Initial use cases include an Excess Inventory Analyzer to reduce surplus stock and improve production adherence, a Service Level Analyzer to resolve service-level exceptions, and a Forecast Accuracy Analyzer to detect and correct forecasting issues that impact inventory and service performance.

o9 introduced its Post Game Analyzer, an AI-driven playback and diagnostics tool that goes beyond KPIs to deliver causal analysis, value leakage detection, and policy optimization.

- **AI R&D Updates.**
  o9's Generative AI Knowledge Assistant builds on the company's R&D commitment to embedding Large Language Models (LLM) and intelligent agents into its Enterprise Knowledge Graph (EKG) to support real-time, enterprise-grade decision-making. The tool enables users to query forecasts, simulate scenarios, and generate executive-ready insights using natural language while preserving data accuracy, traceability, and organizational context. Unlike generic chatbot tools, o9's solution combines AI-driven prompting, organizational best practice recipes, and an automated orchestration engine to surface precise answers, trigger workflows, and provide actionable recommendations across supply chain, finance, and operations functions. Throughout 2024, o9 has been focused on building its Composite Agent Framework, Knowledge Agents, and Atomic Agents with pilots addressing root cause analysis, planning explainability, and UI productivity improvements. In the second half of 2024, o9 will deliver production pilots to enable test-and-learn deployments with select customers, while refining its Agentic AI architecture. By Q2 2025 and beyond, the company plans full-scale production availability of packaged agents

o9 expanded its supply planning capabilities with advanced features like Integrated Order Promising, drag-and-drop Production Scheduling, and multi-tier Supplier Collaboration.

with standard reference models, marking the next evolution of its AI-powered planning platform.

The software vendor's new Composite Agent Framework is building toward fully explainable, multi-agent orchestration for planning, with early pilots underway and production releases slated for 2025.

- **Demand Planning Product Updates.**
  In 2024, o9 Solutions introduced several key enhancements to its demand planning platform designed to improve forecast accuracy, scenario visibility, and overall supply chain responsiveness. New capabilities include advanced statistical forecasting with driver importance and decomposition, alongside multi-level, multi-horizon forecasting functionality. The platform's demand sensing module now offers improved visibility into near-term demand fluctuations by leveraging both internal and external signals. Enhancements to collaborative demand planning (DP) include Rollover Consensus functionality, Forecast Value Add dashboard, and refined demand assumptions with integrated business segmentation. Other highlights include NPI forecasting with cannibalization profiles, improved project and deal planning with EDI triangulation and opportunity data, and key account forecasting that incorporates in-transit inventory and min/max inventory policies. Finally, integrated business planning (IBP) has been strengthened with new capabilities to publish reconciled and optimized (R&O) outputs directly into demand planning, along with target adherence dashboards to track value delivery across the enterprise.

To support long-term customer success, o9 also launched a Customer Center of Excellence (COE) framework.

In 2025, o9 Solutions is expected to deliver significant enhancements across its demand planning platform aimed at increasing forecast precision, platform usability, and supply chain responsiveness. New updates to the statistical and machine learning capabilities include improved iteration frameworks, planning-level decomposition, advanced feature engineering, and the introduction of CML hybrid direct-recursive forecasting with stepwise decomposition for added transparency. In retail forecasting, o9 will introduce separation of training and prediction modes, enhanced explainability for forecast decomposition, promo lift insights, and like-item ramp-up profiles for NPI scenarios. Collaborative Demand Planning (DP) will see improvements in forecast realignment, bulk assortment modifications, enhanced unit of measure functionality, and intelligent exceptions with recommended actions. Updates to Integrated Business Planning (IBP) will support weekly short-term solvers and end-to-end workflow automation. Additional enhancements for Project and Deal Planning include new functionality to boost forecast accuracy.

At the same time, NPI forecasting is being expanded with initiative frameworks and ramp-up profiles for better visibility and control.

- **Supply Planning Product Updates.**
  Over the past year, o9 Solutions has expanded its supply planning capabilities with new advanced building blocks and solution areas aimed at improving responsiveness, collaboration, and scalability across global supply chains. Key advancements include enhanced Integrated Order Promising, providing advanced prioritization and allocation to optimize order fulfillment; new drag-and-drop Production Scheduling with integrated scenario planning; and robust Advanced MRP capabilities that account for contract agreements and purchase order requirements. Supplier Relationship Management has also been strengthened with multi-tier supplier visibility and collaborative triage rooms for proactive adjustments. Additional updates include Big Data scalability improvements leveraging Delta Lake and Python/PySpark, Aggregate Planning for higher-level requirement generation, Project and Deal Planning for milestone-based project management, and Semiconductor Planning tailored to the complexities of FAB and third-party utilization. These enhancements collectively help organizations streamline complex operations, improve supplier collaboration, and boost overall supply chain agility.

- **Center of Excellence (COE) Framework.**
  o9 has developed a dedicated COE framework to drive sustained ROI and improve digital transformation success for its customers. By giving customers ownership and accountability for key functional, technical, and governance activities, the COE enables higher agility, faster adoption, and increased value realization. From early stages of design, build, and deployment, COE members actively participate in solution development alongside o9's global consulting team, while progressively taking on greater responsibility during rollout and continuous improvement phases. This structure equips customers to reduce delivery risks, lower transformation costs, and build in-house knowledge and expertise. To further support customer COEs, o9 offers its Planning and Analytics Center of Excellence (PACE) program. It provides a dedicated team of o9 experts to augment internal resources with services including continuous improvement, model tuning, analytics, and rollout support. The COE and PACE models are designed to align solutions to evolving business needs, accelerate time to value, and reduce external dependency.

Significant updates to demand planning now include multi-level forecasting, demand sensing with business segmentation, and forecast explainability for retail. On the supply side, o9 added drag-and-drop scheduling, multi-tier SRM triage tools, and advanced MRP with contract compliance

RELEX Solutions

RELEX Solutions is placed as a Leader in the 2025 SCP Technology Value Matrix, delivering a unified supply chain and retail planning platform for mid-sized to top-tier organizations. The solution supports industries including retail (grocery, convenience stores, electronic retailers, home furnishing), wholesale and distribution (automotive, pharmaceutical, building and construction), and consumer packaged goods and manufacturing (fresh food producers, food and beverage, health and beauty, and home and living) industries. The vendor provides functionality such as demand planning and sensing, production planning and scheduling, distribution planning, merchandising planning, integrated business planning, pricing and promotions, space and assortment, replenishment, and sales and operations execution. RELEX is designed to connect and streamline planning processes using AI, machine learning, and digital twin modeling, allowing organizations to simulate and optimize their supply chains in near real time. RELEX Rebot, a RELEX-trained large language model (LLM), introduces GenAI and Agentic AI capabilities to customers within the platform. The platform operates on a scalable, configurable, adaptable, modular architecture that enables easy expansion and seamless upgrades, with strong data infrastructure supported by partnerships with providers such as Snowflake and Confluent Kafka.

RELEX Solutions offers a unified, AI-powered planning platform spanning retail, distribution, and CPG/manufacturing.

In January 2024, RELEX acquired Optimity to offer customers synchronized demand, supply, production, and distribution planning within a single platform. This acquisition enhances RELEX's production planning and supply chain optimization capabilities, including daily production planning, optimization, and production scheduling in complex food & beverage and manufacturing industries.

RELEX's acquisition of Optimity significantly strengthened its production and distribution planning capabilities.

Updates over the last 12 months:

- **Embedded Optimization Capabilities.**
  Following the January 2024 acquisition of Optimity, RELEX embedded supply optimization capabilities into its unified Supply Chain Planning platform, improving production planning for complex manufacturing operations.

- **Scenario Planning Available Across the RELEX Platform.**
  End-to-end scenario planning is now available across the RELEX platform, enabling customers to model uncertainties and evaluate alternative supply chain strategies collaboratively.

- **ML Updates.**

RELEX enhanced its machine learning forecasting by introducing pooled models that increase forecast accuracy, particularly for slow-moving products with limited historical data.

RELEX expanded its Agentic AI functionality with Rebot, now embedded in the platform UI to streamline user workflows.

- **Rebot.**
  Rebot, RELEX's GenAI assistant, is now integrated into the RELEX user interface, streamlining workflows through intelligent recommendations and automation. The company is actively investing in Agentic AI capabilities with ongoing customer engagement.

- **RELEX Diagnostics Expansion.**
  RELEX Diagnostics expanded beyond out-of-stock root cause analysis to include excess inventory analysis and forward-looking diagnostics, allowing more proactive, data-driven decision-making.

- **True Inventory Feature.**
  The AI-driven True Inventory feature identifies phantom inventory and corrects inventory drift, improving store inventory accuracy and replenishment efficiency.

- **Open-to-Buy Solution.**
  RELEX launched an Open-to-Buy solution that unifies top-down budgeting with daily operational replenishment, supporting more efficient retail inventory planning.

- **Agentic AI Capabilities.**
  The first use of the platforms' agentic AI capabilities, integrated with RELEX Diagnostics, is in customer pilots, providing AI-generated diagnostics and actionable supply chain recommendations.

Wolters Kluwer CCH Tagetik

Wolters Kluwer CCH Tagetik delivers a finance-first supply chain planning platform that unifies operational and financial planning for industries like F&B, CPG, pharma, and manufacturing.

Wolters Kluwer CCH Tagetik is a Leader in the 2025 SCP Technology Value Matrix, providing a finance-driven supply chain planning platform for industries such as food and beverage, consumer packaged goods, oil and gas, manufacturing, automotive, pharmaceutical, and retail. The CCH Tagetik Intelligent Platform integrates operational and financial data to deliver enhanced visibility, optimization, and decision-making through analytics, collaborative workflows, and advanced reporting. The platform offers supply chain planning capabilities, including S&OP, demand, supply, inventory, capacity, integrated business, and production planning. AI and machine learning models within CCH Tagetik provide probabilistic forecasting and predictive analytics,

automatically updating plans, identifying anomalies, and uncovering new opportunities to improve efficiency and profitability.

Updates over the last 12 months:

- **AI/ML Updates.**
  The CCH Tagetik Intelligent Platform and Integrated Business Planning suite were enhanced with AI/ML capabilities, introducing generative AI, Driver-Based Analysis, and the Ask AI conversational agent to simplify scenario planning, forecast analysis, and user interaction through visual dashboards, graphs, and reports.

- **Demand Planning Updates.**
  Demand Planning operations were upgraded with microservice architecture, which allows independent execution of planning functions for different scenarios. This improves scalability and response times for both centralized and decentralized planning environments.

- **Supply Planning Updates.**
  Supply Planning now includes an enhanced min/max inventory strategy that incorporates supplier lead times and item-level settings, enabling organizations to optimize inventory policies while maintaining cost control.

- **Production Planning Updates.**
  Production Planning received improvements in Constraint-Based Planning, including support for Capacity Resource Variable Changeover and Daily Hours configurations. This provides planners with increased flexibility to model variable production schedules based on changing demand or resource constraints.

- **Data Integration Updates.**
  For data integration, they introduced a simplified, visual interface with point-and-click and drag-and-drop functionality to accelerate the integration of diverse datasets into SCP models and improve administrator efficiency.

The platform adopted microservices for demand planning to improve scalability, while supply and production planning received upgrades like enhanced min/max logic, supplier lead-time integration, and variable changeover scheduling.

Wolters Kluwer CCH Tagetik introduced Ask AI, a conversational agent that allows users to interact with planning models, run scenarios, and analyze forecasts using natural language.

Experts

Experts in the SCP Technology Value Matrix are Dassault Systèmes, e2open, ICRON, OMP, and ToolsGroup.

Dassault Systèmes

Dassault Systèmes is positioned as an Expert in the 2025 SCP Technology Value Matrix for its 3DEXPERIENCE platform, which delivers digital modeling and supply chain management capabilities to industries such as aerospace and defense, transportation, marine, high-tech, consumer packaged goods, healthcare, construction, and home equipment. Within the platform, DELMIA Supply Chain Planning and Optimization (SCPO) provides integrated functionality for demand planning, demand sensing, supply planning, procurement planning, scenario modeling, inventory optimization, Master Production Scheduling (MPS), Advanced Planning and Scheduling (APS), and Integrated Business Planning (IBP). These tools help organizations synchronize supply, production, and logistics while improving resilience and responsiveness across the supply chain. DELMIA combines real-time data, AI/ML optimization, and scenario planning to support faster, more informed decision-making and alignment of operational and financial plans.

Dassault's 3DEXPERIENCE platform includes DELMIA SCPO, which delivers broad supply chain planning capabilities, such as demand sensing, supply planning, inventory optimization, and APS.

e2open

E2open is recognized as an Expert in the 2025 SCP Technology Value Matrix, providing comprehensive supply chain planning and execution solutions for industries such as aerospace and defense, retail, software, telecommunications, apparel, automotive, consumer goods, food and beverage, high-tech, manufacturing, oil and gas, pharmaceuticals, and third-party logistics. The platform offers core planning capabilities, including demand sensing, demand planning, supply planning, supply sensing, inventory optimization, distribution planning, S&OP, and order promising, with additional modules for supplier collaboration, demand signal management, transportation management, control tower, and due diligence screening. E2open is also known for e2net, one of the largest global partner networks with over 500,000 connected enterprises, enabling real-time collaboration and visibility across the extended supply chain. The platform helps organizations integrate data flows across their immediate suppliers, partners, and broader operational ecosystem to detect disruptions, manage shortages, and improve responsiveness. Recently, e2open launched Supply Network Discovery, providing multi-tier supplier mapping, relationship visibility, and traceability to enhance due diligence, supplier collaboration, and overall supply chain transparency.

E2open delivers a vertically integrated planning and execution suite, spanning demand and supply planning, inventory optimization, order promising, and control tower capabilities.

Recent updates and announcements include:

- **Snowflake Partnership.**

E2open formalized its partnership with Snowflake to enhance its AI and Analytics Data Lakehouse, introducing a three-stage roadmap for connecting to clients' data lakehouse, modernizing the common data model, and delivering new business capabilities, including an Aggregate Connector, which simplifies data ingestion and transformation into Snowflake and enhances analytics capabilities.

Its standout feature is e2net, a vast partner network of over 500,000 connected enterprises, which enables real-time, multi-tier collaboration and data exchange across the global supply chain.

- **Connected Planning Model Updates.**
  The Connected Planning model eliminates manual data transfers between applications with intelligent real-time synchronization and robust error handling. At the same time, new dashboards provide end-to-end KPI visibility and drill-down functionality to improve decision-making.

- **Universal Forecast Engine.**
  The Universal Forecast Engine redefines demand sensing by combining advanced AI with distributed computing. It enables rapid parameter optimization, unlimited scenario testing, and continuous machine learning adaptation to improve forecast accuracy across the supply chain.

- **Demand Planning Updates.**
  Enhanced demand planning introduces auto-tuning and smart time profiles for distributing forecasts, while upgraded demand sensing leverages AI to improve forecast accuracy, particularly under constrained supply scenarios.

The new Snowflake partnership enhances data ingestion, analytics, and interoperability through a modernized data lakehouse model and new tools like the Aggregate Connector.

- **S&OP Updates.**
  Enhanced demand planning introduces auto-tuning and smart time profiles for distributing forecasts, while upgraded demand sensing leverages AI to improve forecast accuracy, particularly under constrained supply scenarios.

- **Inventory Optimization Updates.**
  Inventory Optimization enhancements enable more granular service-level targeting, direct scenario publishing to downstream systems, carbon footprint and water savings tracking from inventory reductions, and discrete end-of-life planning to reduce surplus.

- **Supply Planning Updates.**
  Supply Planning updates include quality risk management with "Process on Risk," visibility into component delays with "Push Alert Cumulated Delays," Phantom Part logic for discrete planning, and proposal-level approval control to ensure precise, efficient planning.

- **Upstream Collaboration Updates.**
  Upstream Collaboration enhancements feature sub-tier risk visibility through Resilinc integration, unified navigation across applications, Dynamic data panels, improved pegged quantity calculations, customizable data visibility, and streamlined Scan & Pack functionality to optimize shipment accuracy.

- **New Supplier Commit Process Updates.**
  The simplified supplier commit process for unconstrained items includes an "Auto-commit" feature for faster forecast confirmations, while enhanced milestone tracking improves visibility at every stage of the product lifecycle with batch updates and task status tracking.

- **Downstream Collaboration Updates.**
  Downstream Collaboration advancements include Walmart Luminate partner certification, enabling access to granular demand signals, partner-initiated planning for scalability, Kroger and Nielsen IQ data integrations for retail insights, and expanded APIs to transform GTIN-level inventory tracking and deliver detailed store demand forecasts.

E2open delivered deep updates across Connected Planning, Inventory Optimization, and both upstream and downstream collaboration, including integrations with Resilinc, Walmart Luminate, Kroger, and Nielsen IQ.

ICRON

ICRON is recognized as an Expert in the 2025 SCP Technology Value Matrix. ICRON provides supply chain planning software designed to help organizations manage and optimize operations across production, inventory, procurement, and distribution. The platform offers capabilities for demand planning, order promising, capacity planning, production scheduling, replenishment, material supply planning, and multi-echelon inventory optimization, along with integrated business planning functions like S&OP and network design. Built on a unified data model, ICRON's platform allows companies to connect planning processes across departments and simulate scenarios to support better decision-making. The solution serves industries such as automotive, aviation, chemicals, consumer goods, defense, food and beverage, glass, high-tech, and life sciences, with deployment options that include cloud or on-premises environments.

ICRON introduced decision intelligence tools that provide transparent, data-backed justifications for recommendations and trade-offs.

Updates over the last 12 months:

- **Demand Planning Updates.**
  The software vendor enhanced demand planning capabilities by combining machine learning with industry-specific optimization techniques, improving forecast accuracy and response times.

- **Inventory Optimization Updates.**
  ICRON added simulation capabilities to the multi-echelon inventory optimization module, allowing planners to test different inventory policies and evaluate impacts quickly.

New simulation tools in multi-echelon inventory optimization help planners quickly evaluate policy impacts.

- **Decision Intelligence and Explainability.**
  The SCP vendor rolled out advanced decision intelligence tools that provide clear, data-backed reasoning behind recommendations, conflict resolutions, and trade-offs to build user trust and support faster decisions.

OMP

OMP is an Expert in the 2025 SCP Technology Value Matrix, recognized for its Unison Planning platform, a cloud-native solution built on Microsoft Azure. OMP provides integrated planning capabilities across demand management, sales and operations planning, scheduling, and supply chain modeling for industries including consumer goods, life sciences, chemicals, metals, and packaging. The platform enables organizations to simulate and optimize complex supply chains by incorporating production constraints, inventory management, distribution flows, and quality requirements. In life sciences, OMP supports fragmented demand and regulatory complexity, optimizing dual sourcing and production schedules. For chemicals, it models batch processes, material flows, and storage to minimize changeovers and optimize utilities. In consumer goods, it improves demand sensing, scenario planning, and phase-in/phase-out strategies to support just-in-time production and distribution. The platform also supports metal manufacturers by managing order variability, routing, machine utilization, and margin optimization. At the same time, packaging and plastics producers leverage Unison Planning for campaign planning, cutting, transport optimization, and MES-based traceability.

OMP's Unison Planning is a cloud-native, Azure-based platform that delivers integrated planning across demand, supply, scheduling, and S&OP for complex, constraint-driven industries like life sciences, chemicals, consumer goods, and metals.

Updates over the last 12 months:

- **SAP Certification for Unison Planning.**
  OMP's Unison Planning achieved SAP certification for integration with RISE with SAP S/4HANA Cloud, enabling seamless, near-real-time connectivity between Unison Planning and SAP environments for demand, production, and sourcing data. This simplifies deployment and ensures compatibility for businesses migrating to S/4HANA.

- **Expanded Partnership with Orion Digital Solutions.**

OMP deepened its partnership with Orion by acquiring a minority stake, combining Orion's strengths in AI, automation, and analytics Unison Planning's end-to-end supply chain platform to drive innovation and expand reach in the Middle East and beyond.

OMP expanded its ecosystem via a strategic investment in Orion Digital Solutions to accelerate AI-driven innovation, and partnered with Bluecrux to align planning and lab operations for life sciences.

- **New CEO.**
  Paul Vanvuchelen was appointed CEO, succeeding Anita Van Looveren, with a focus on reinforcing OMP's leadership in advanced supply chain planning. Vanvuchelen brings deep industry experience, having led supply chain transformations in manufacturing before joining OMP.

- **Bluecrux Joint Life Sciences Solutions.**
  OMP and Bluecrux combined their platforms, Unison Planning and Binocs, to deliver an integrated solution for life sciences companies. This helps align production and laboratory operations, improving responsiveness and efficiency in highly regulated environments.

ToolsGroup

ToolsGroup's SO99+ platform is built for resilient, AI-driven planning, offering advanced capabilities like probabilistic forecasting, replenishment, and scenario modeling.

ToolsGroup is positioned as an Expert in the 2025 SCP Technology Value Matrix, recognized for its AI-driven platform supporting supply chain resilience and automation. The company serves industries such as aftermarket parts, manufacturing, distribution, retail, and consumer packaged goods. Its primary platform, Service Optimizer 99+ (SO99+), delivers advanced demand forecasting, demand sensing, inventory optimization, replenishment, production and capacity planning, sales and operations planning (S&OP), and scenario-based decision support. SO99+ uses AI-powered probabilistic modeling to optimize inventory at the SKU-location level, improving service levels while minimizing carrying costs. ToolsGroup also offers Data Hub for creating digital supply chain twins and Decision Hub for scenario planning and risk management.

The platform includes modular applications like RebalanceAI for supply chain rebalancing, PriceAI for lifecycle price and promotions optimization, MarkdownAI for end-of-lifecycle price optimization, and FulfillAI for intelligent fulfillment planning. For retail and consumer goods sectors, the company provides JustEnough, a dedicated suite for assortment planning, merchandise financial planning, in-season inventory management, and pricing strategies. ToolsGroup's integrated approach connects with third-party ERP, CRM, and BI tools to enhance cross-functional collaboration, giving organizations end-to-end visibility and greater agility in supply chain decision-making.

Updates over the last 12 months:

In 2025, ToolsGroup launched InventoryAI, a composable AI-powered solution combining strengths from SO99+, JustEnough, EVO, and Onera.

- **Product Updates.**
  Over the last 12 months, ToolsGroup launched InventoryAI, an AI-powered inventory management solution designed to help retailers reduce stockouts, optimize inventory placement, and increase profitability. Announced at NRF 2025, the solution brings together proven capabilities from ToolsGroup's existing platforms, SO99+, JustEnough, EVO, and Onera, into a unified, composable system. InventoryAI leverages probabilistic forecasting, real-time demand sensing, and AI-driven allocation and replenishment to simplify decision-making and improve in-season inventory performance.

Accelerators

Accelerators in the SCP Technology Value Matrix are Blue Ridge, GAINS, Logility, New Horizon Soft, and Slimstock.

Blue Ridge

Blue Ridge delivers industry-focused SCP solutions tailored for mid-market manufacturing, distribution, and retail sectors, including verticals like wine & spirits, HVAC, and pet supplies.

Blue Ridge Global is recognized as an Accelerator in the 2025 SCP Technology Value Matrix, providing supply chain planning solutions for the manufacturing, distribution, and retail industries, with a strong focus on verticals such as wine and spirits, food service, convenience, furniture, hardware, HVAC, plumbing, cosmetics and pet supplies. The Blue Ridge platform offers integrated demand planning, segmentation management, AI/ML-powered analytics, and integrated business planning (IBP). Designed with industry-specific, pre-configured features, native cloud delivery, and an intuitive interface, the platform enables fast deployments and simplifies the transition from legacy systems. Blue Ridge also integrates with over 40 ERP systems and external applications, including business intelligence (BI) and CRM platforms, helping organizations streamline operations and coordinate demand planning across their broader technology ecosystem.

Recent updates and announcements include:

- **Demand Planning Updates.**
  Blue Ridge enhanced the user experience with drill-up and drill-down forecasting for deeper analysis. The platform added support for independent and dependent demand streams and expanded machine learning forecasting methods. Users can now enhance events and link historical data to improve forecast accuracy.

- **Replenishment Updates.**

New capabilities include customer-level event modeling and multi-sourcing supplier designation for greater flexibility. Order cycle Optimization and Cost of Service Analysis tools that allow planners to evaluate multiple scenarios simultaneously. Order Build Science enables custom item grouping to meet bracket constraints. MEIO improvements include DC safety stock pooling and smarter low-stock point adjustment, which enhances inventory responsiveness.

Blue Ridge significantly improved its replenishment engine with tools like customer-level event modeling, multi-sourcing, and Order Build Science, while also adding master production scheduling and rough-cut capacity planning.

- **Integrated Business Planning Updates.**
  Blue Ridge introduced event creation capabilities within IBP to align planning across functions and improve responsiveness to market changes. IBP also provides for supplier collaboration and aligns forecasting externally.

- **Supply Planning Updates.**
  New features include master production scheduling and rough-cut capacity planning, providing more control over supply chain constraints. An interconnected workflow enhances visibility and alignment across material and inventory replenishment planning processes.

- **Usability Updates.**
  The platform now offers embedded analytics and reporting for actionable insights. A modern, intuitive interface improves ease of use, supported by a composable, distributed data platform for greater scalability and flexibility.

- **Gen AI Updates.**
  Blue Ridge introduced the Demand Agent for forecast explainability, leveraging generative AI to provide clear, actionable insights into forecast drivers and improve planner confidence.

GAINS

GAINS is placed as an Accelerator in the 2025 SCP Technology Value Matrix, providing supply chain planning solutions for organizations in the distribution, retail, manufacturing, and service parts industries. The GAINS platform is built on a composable, modular architecture, allowing businesses to add capabilities over time and scale the solution based on their evolving needs. Core functionalities include demand planning, forecasting, inventory optimization, replenishment, procurement automation, supply and production optimization, and S&OP. A key strength of GAINS is its AI-powered Multi-Echelon Inventory Optimization (MEIO), which helps businesses reduce inventory costs, improve service levels, and automatically adjust to

GAINS delivers a modular, composable SCP platform built for distribution, retail, manufacturing, and service parts industries.

demand or supply changes. The system accounts for bill-of-materials (BOM) and distribution requirements across the network to determine optimal inventory levels and location-specific service targets. GAINS unifies sales, financial, and operational data into a single version of the truth, providing leaders with clear visibility across the supply chain.

GAINS launched the Decision Engineering Orchestration (DEO) platform, enabling real-time trade-off modeling, feedback loops, and scenario testing.

Recent updates and announcements include:

- **DEO Platform.**
  GAINS launched the GAINS Decision Engineering Orchestration (CEO) platform that helps users simulate, evaluate, and orchestrate decisions across strategic, tactical, and operational horizons with real-time trade-off modeling, impact analysis, persistent feedback loops, and high-fidelity data sharing.

- **Simulation as a Composable Service.**
  GAINS introduced Simulation as a Composable Service, allowing organizations to model real-world supply chain behavior, test policy changes, and evaluate impacts under uncertainty. This supports a shift from static planning to empirically grounded decision-making.

- **Demand Prediction as a Composability Service.**
  A new, composable ML-based demand Prediction Service was launched. It combines proprietary forecast engines with customer-specific and external data for more accurate, explainable predictions that improve planner confidence and productivity.

- **Agentic AI.**
  The software vendor showcased early-stage Agentic AI capabilities designed to assist with autonomous decision evaluation, task execution, and real-time insights, providing planner support within supply chain-aware guardrails, with users engaging the system through a chat-based assistant.

GAINS launched a composable Demand Prediction Service that combines proprietary forecasting engines with customer-specific and external data sources.

- **Databricks Partnership.**
  GAINS announced a strategic partnership with Databricks, integrating its Lakehouse platform for scalable ingestion, transformation, and federation of structured and unstructured data to enhance advanced analytics and AI model training.

- **Supply Chain Awareness.**
  GAINS introduced the concept of Supply Chain Awareness with a dynamic, composable reference model emphasizing decision-driven processes over rigid, end-to-end workflows to support continuous adaptation and composability.

- **Principles of Decision Engineering.**
  The GAINS Principles of Decision Engineering were formally published, providing a framework for outcome-driven decision-making, scenario thinking, and integration of data science, decision science, and distributed system architecture.

- **General Composability Updates.**
  GAINS continued evolving its platform toward a composable, decision-centric architecture, integrating simulation, AI/ML, optimization, scenario modeling, and agent-based interfaces to support continuous alignment of decisions with business outcomes. As part of GAINS' transition from a monolithic application to a composable architecture, ABC Classification and Demand Forecasting were introduced as standalone services, enabling dynamic segmentation and predictive insights that integrate directly into planning policies, service-level strategies, and complementary capabilities like MEIO and Lead Time Prediction.

GAINS partnered with Databricks to support scalable model training and enhance its composable architecture.

Logility

Logility is recognized as an Accelerator in the 2025 SCP Technology Value Matrix, offering its Digital Intelligence Platform to help organizations improve forecasting, inventory management, supplier collaboration, and operational performance. The platform delivers AI-powered demand planning, multi-echelon inventory optimization, production scheduling, and automated vendor management, with industry-specific solutions for retail, fashion, consumer goods, food and beverage, chemicals, and more. A centralized data management layer standardizes information across regions and divisions, supporting more connected, data-driven decisions.

The Logility Digital Intelligence Platform offers AI-powered SCP capabilities across demand planning, MEIO, production scheduling, and supplier collaboration.

Over the last year, Logility enhanced the platform with new Generative AI features, including DemandAI+, which modernizes forecasting and provides real-time answers through conversational interfaces. The Decision Command Center was also introduced to deliver cross-functional visibility, audit trails, and faster, connected decision-making. Additional updates include supplier risk monitoring, vendor compliance tools, the InventoryAI+ dashboard for intelligent exception management, and probabilistic inventory planning for managing sporadic demand. Together, these improvements help companies boost forecast accuracy, reduce stockouts, and respond more quickly to supply chain disruptions.

Updates over the last 12 months:

- **Intelligent Order Response Launch.**
  Logility launched Intelligent Order Response, an AI-native solution that automates order allocation by continuously monitoring demand-supply imbalances and providing intelligent, optimized recommendations for fulfilling orders within business constraints.

Logility introduced LEA, a Generative AI assistant that provides natural language insights into supply chain performance.

- **Logility Expert Advisor (LEA) Introduction.**
  The vendor introduced Logility Expert Advisor (LEA), an interactive Generative AI assistant that provides natural language insights on supply chain performance. Future updates will expand LEA's agentic AI capabilities to enable proactive scenario management and self-healing supply chains.

- **Continuous Network Optimization Release.**
  Continuous Network Optimization was released, providing an automated, AI-driven approach to sense disruptions or cost changes in real time, recommend network adjustments, and realign operational plans for improved resilience and efficiency.

- **Decision Command Center Enhancements.**
  The Decision Command Center was enhanced to improve cross-functional collaboration with structured workflows, real-time notifications, customizable templates, and role-based assignments, supporting faster and more aligned enterprise decision-making.

- **DemandAI+ Updates.**
  DemandAI+ was upgraded with enhanced distribution network logic for smoother customer transitions and new demand sensing capabilities using causal variables, including out-of-the-box POS and inventory data integration.

Logility expanded DemandAI+ with new demand sensing capabilities and enhanced distribution network logic, improving forecast precision using causal factors like POS and inventory data.

- **InventoryAI+ Updates.**
  InventoryAI+ added an intelligent, cloud-native exceptions management system that prioritizes issues and provides specific recommended actions to improve inventory handling and service levels.

- **Manufacturing Optimization Solution Updates.**
  The Manufacturing Optimization solution introduced support for variable dwell times between linked operations and streamlined onboarding of large datasets to accelerate deployment for complex production environments.

- **Network Design and Optimization Updates.**

Logility launched Continuous Network Optimization.

Logility enhanced its Network Design and Optimization solution with GenAI-powered scenario summarization and comparisons, Automatic customer node grouping based on freight logic, simultaneous network and inventory optimization, and automated production model data aggregation to reduce manual workload and improve strategic planning outcomes.

New Horizon Soft

New Horizon Planning Suite is a modular, cloud-native SCP platform that integrates demand, supply, production, and replenishment planning with MEIO and S&OP.

New Horizon Soft is recognized as an Accelerator in the 2025 SCP Technology Value Matrix for its New Horizon Planning Suite. The suite includes Demand Planning, Supply Planning, Buyers Workbench, Production Planning, Replenishment Planning, Multi-Echelon Inventory Optimization (MEIO), Sales & Operations Planning (S&OP), and Strategic Planning capabilities. These applications are unified through the New Horizon Platform, which provides a centralized architecture for AI, machine learning, integration services, security, and user experience. The suite leverages a Unified Data Repository to streamline real-time data access, improving planning accuracy and collaboration across departments. New Horizon emphasizes ease of deployment through industry templates and consulting services, enabling organizations to achieve system go-lives in as little as one month. Its modular, cloud-native design offers both flexibility and scalability, allowing businesses to improve inventory optimization, production efficiency, and overall supply chain responsiveness without the burden of heavy customization. The software vendor supports organizations within the consumer-packaged goods, food service, manufacturing, retail, and wholesale distribution industries.

Updates over the last 12 months:

- **Demand Planning Updates.**
  Planners can now pull in open-source data (like ChatGPT) to improve forecast accuracy by using external factors as part of demand models. The software vendor also doubled the number of available forecasting models from 10 to 20, allowing the system to better match the right model to each product and location combination for improved accuracy.

- **Supply Planning Updates.**
  AI now suggests daily tasks based on each user's role, helping planners resolve exceptions faster and keep service levels high. The tariff-aware procurement optimization system helps planners adjust sourcing decisions based on tariffs, country of origin, risk factors, and working capital needs to optimize costs. Also, purchase

deliveries can now be leveled across time to avoid bottlenecks at Distribution centers, reducing labor strain and logistics costs through the Master Purchasing Receipt Scheduling module.

- **Cross-Platform Enhancements.** The software vendor added integrated dashboards with drill-down capabilities for more profound insights across all New Horizon applications. Users can now interact with supply chain data using natural language (similar to ChatGPT), turning raw data into quick, actionable insights on the platform. The vendor launched ready-made templates tailored to discrete manufacturing, accelerating setup and reducing time to value. Lastly, New Horizon applications are now available on Microsoft Azure and integrate easily with Dynamics 365, making deployment simpler for Microsoft ERP customers.

The platform introduced role-aware AI task suggestions in supply planning, a tariff-aware procurement optimizer, and Master Purchasing Receipt Scheduling to smooth DC deliveries.

Slimstock

Slimstock is recognized as an Accelerator in the 2025 SCP Technology Value Matrix for its Slim4 platform, designed to optimize planning and inventory performance across complex supply chains. Slim4 delivers a wide range of capabilities, including demand forecasting, demand sensing, supply planning, multi-echelon inventory optimization, network balancing, shelf-life management, assortment planning, production planning and scheduling, sales and operations execution (S&OE), sales and operations planning (S&OP), and scenario planning. The platform provides integrated business planning to help organizations balance service levels, inventory investment, and operational efficiency. Slimstock supports customers in the manufacturing, wholesale, retail, e-commerce, and MRO sectors, with expertise across industries such as automotive, building supply, consumer goods, fashion, food and grocery, industrial components, mining, multi-metal, paper and packaging, healthcare, and sanitary products.

Slimstock's Slim4 platform is an end-to-end supply chain planning solution that optimizes inventory, demand, and supply across complex networks.

Core Providers

Core Providers in the SCP Technology Value Matrix are Anaplan, Board International, Coupa, FuturMaster, Manhattan Associates, and QAD.

Anaplan

Anaplan is recognized as a Core Provider in the 2025 SCP Technology Value Matrix. The vendor offers its supply chain planning solution built on the Anaplan Platform and serves industries such as life sciences,

Anaplan's supply chain solution, part of The Anaplan Platform, focuses on Connected Planning.

high-tech, consumer goods, retail, manufacturing, and healthcare. Anaplan's supply chain capabilities include integrated business planning, with dedicated functionality for S&OP and long-range planning, as well as demand and supply planning. Demand planning covers demand sensing, customer collaboration, segmentation analysis, portfolio and product lifecycle planning, and trade promotion planning. Supply planning features include distribution planning, inventory management and optimization, network planning, and allocation and replenishment. Anaplan's Connected Planning approach centralizes operational and financial data, allowing users to align planning across functions and quickly adjust to market changes. The platform integrates with PlanIQ for AI-powered forecasting, leveraging AWS's Amazon Forecast, and works with Google Cloud's Digital Supply Chain Twin and Vertex AI to improve execution visibility, scenario planning, and forecast accuracy across the network.

Anaplan expanded its AI portfolio, embedding predictive, generative, and agentic AI across planning workflows.

Recent updates and announcements include:

- **AI Portfolio and New Application Launch.**

  Anaplan expanded its AI roadmap with predictive, generative, and agentic AI embedded across its platform. New AI-powered applications were launched for segmentation, go-to-market capacity planning, integrated business planning (IBP), and merchandise financial planning, improving decision-making speed, productivity, and planning precision for finance, supply chain, and commercial teams.

- **Anaplan CoPlanner for Demand Planning.**

  Anaplan released CoPlanner, a conversational AI for querying models and generating insights, which was initially embedded in demand planning. Users can ask domain-specific questions via desktop or mobile, receive immediate insights, and automate workflows, driving faster and more informed decisions across demand, supply, and financial models.

Anaplan introduced CoPlanner, a conversational AI tool that lets users query models and generate insights directly from desktop or mobile.

- **$500M Product Investment and Data Orchestrator Launch.**
  Anaplan outlined a $500M multi-year innovation investment, with the first milestone being Anaplan Data Orchestrator (ADO). ADO simplifies data integration and management, connecting systems like SAP and Salesforce, automating transformations, and cutting deployment time and cost by up to 50 percent.

- **Expansion into the Middle East.**

Anaplan extended its partnership with AWS by launching its platform in the AWS Middle East (UAE) region. This enables lower latency, local data residency, and improved performance for customers in the UAE, supporting planning across finance, supply chain, and workforce operations.

With a $500M product investment, Anaplan introduced Anaplan Data Orchestrator (ADO) to simplify data integration and reduce deployment times.

- **New India Data Center.**
  Anaplan opened a local data center in India, ensuring data sovereignty and low-latency performance for Indian enterprises. The move supports compliance with local regulations and accelerates digital transformation in key sectors like financial services, manufacturing, and retail.

- **Expansion into APAC.**
  Following the launch of the India Data Center, Anaplan plans to build additional data centers in Indonesia and Singapore to enhance its regional presence and support large-scale scenario planning across the Asia-Pacific.

Board International

Board International is positioned as a core provider in the 2025 SCP Technology Value Matrix for its intelligent planning for supply chain solutions. Built on the Board Enterprise Planning Platform and hosted on Microsoft Azure, the solution combines demand planning, supply planning, inventory and distribution planning, and sales and operations planning within a unified system. The platform provides a single source of truth for supply chain activities, enabling faster responses to supply and demand fluctuations and supporting profitability through optimized allocation and network decisions. With an emphasis on Integrated Business Planning, Board allows organizations to align supply chain operations with workforce planning, new product introductions, and pricing strategies, helping to improve margins and operational agility.

Board's Intelligent Planning for Supply Chain, part of the Board Enterprise Planning Platform, unifies demand, supply, inventory, and S&OP into a single system.

Recent updates and announcements include:

- **Board and Microsoft Expand Partnership.**
  Board deepened its long-standing partnership with Microsoft, expanding Azure OpenAI Service integration to boost predictive forecasting, scenario planning, and economic intelligence within the Board platform. The partnership also included joint go-to-market expansion in North America, co-selling initiatives, marketing collaboration, and continued availability of Board's Enterprise Planning Platform on Azure Marketplace.

- **Board and 263HuB Partnership.**
  The software vendor formed a strategic partnership with 263HuB to expand Enterprise Planning services across Africa, Europe, and North America. 263HuB leverages its managed services expertise to support the Board's platform, focusing on finance, operations, and regulatory reporting. Together, they offer businesses enhanced decision-making tools, real-time planning, and operational agility.

- **Board and Protiviti Alliance.**
  Board announced a strategic alliance with Protiviti to deliver integrated business planning and finance transformation solutions, especially in North America. Protiviti combines its consulting and implementation expertise with Board's AI-driven platform to help businesses modernize finance, improve forecasting, and enhance strategic decision-making across industries like Retail, CPG, Manufacturing, and Financial Services.

- **Board and Tekplanit Partnership.**
  The software vendor entered a strategic partnership with Tekplanit to elevate enterprise planning with predictive analytics and AI-driven forecasting. The collaboration focuses on Retail, Manufacturing, and CPG industries, providing businesses with real-time insights and tools to align strategy with execution and improve decision-making speed and accuracy.

- **Board and QueBIT Partnership.**
  Partnered with QueBIT, a provider of advanced analytics and planning solutions, to help businesses integrate financial, operational, and strategic planning. The collaboration enhances Board's platform with QueBIT's technical expertise, delivering scalable, customized planning and analytics capabilities that improve efficiency and foster enterprise-wide collaboration.

- **Board AI Agents.**
  Board introduced a preview of AI-powered Board Agents as part of version 14.3. These agents help automate tasks like monitoring risks, providing real-time analysis, and simulating scenarios. Agents are tailored for finance, commercial, and supply chain teams to support faster, more informed decision-making while keeping human planners in control. The software vendor introduced Smart Intake & Orchestration to help organizations map and refine business process workflows inside the Board platform. This ensures that AI Agents operate within established processes, building trust and improving the reliability of automated decision support.

Board introduced AI-powered Board Agents in version 14.3, supporting real-time risk monitoring, scenario analysis, and automated task execution, while keeping planners in control.

Board entered a strategic partnership with Tekplanit to enhance enterprise planning through predictive analytics and AI-powered forecasting.

- **Board 14.3 Platform Update.**
  The 14.3 release enhanced Board's Enterprise Planning Platform with improved performance, faster data entry, better visualizations, and new self-service tools for scenario modeling. This update aimed to reduce friction in the planning process and improve collaboration across teams.

Board expanded its Microsoft Azure partnership, embedding Azure OpenAI for advanced predictive analytics and scenario modeling, while becoming fully available on the Azure Marketplace.

- **Board Foresight.**
  Board embedded continuous planning capabilities with the launch of Board Foresight. It integrates external economic signals into planning models, allowing users to adjust forecasts in real-time based on changing market conditions, with outputs sent back into the platform at the click of a button. Following the acquisition of Prevedere, Board launched Foresight and Signals, providing access to over 5 million global datasets and predictive analytics. These tools combine internal company data with external economic indicators to help businesses improve forecast accuracy, anticipate market shifts, and respond to volatility more effectively.

- **New Supplier Collaboration Tools.**
  The software vendor expanded its supplier collaboration features beyond purchase orders and forecasts to include inventory monitoring. Suppliers can now track stock levels at customer warehouses, helping reduce safety stock, carrying costs, and improving supply chain alignment.

Board partnered with Protiviti to deliver integrated business planning and finance transformation solutions, focusing on industries like retail, CPG, manufacturing, and financial services

- **Expanded Microsoft Azure Availability.**
  Board's Enterprise Planning Platform became fully available in the Microsoft Azure Marketplace, providing simplified procurement for enterprises already invested in Microsoft's cloud. This move also offers economic benefits through M.A.C.C. (Microsoft Azure Consumption Commitment) eligibility.

- **Expanded ISO Certifications for Security and Compliance**
  Board achieved additional ISO certifications, ISO 27017 for cloud security best practices, ISO 27018 for personal data protection, and ISO 9001 for SaaS quality management, reinforcing its commitment to security and privacy for customers.

Coupa

Coupa is recognized as a Core Provider in the 2025 SCP Technology Value Matrix for its Supply Chain Design and Planning platform, used to model, analyze, and optimize global supply chains. The solution includes digital twin modeling, network optimization, demand,

modeling, transportation optimization, and inventory management. Coupa also offers Source-to-Contract and Supply Chain Collaboration tools to help organizations improve supplier management and sourcing decisions. The platform connects supply chain processes with broader financial operations, including procure-to-pay, treasury, and accounts payable. Coupa's AI platform, including Coupa AI and Coupa Navi, is embedded across the suite to support faster, more confident decision-making. Coupa Navi provides an agentic AI experience that surfaces recommendations, automates tasks, and guides users through supply chain decisions by analyzing real-time operational, supplier, and financial data.

Coupa's Supply Chain Design and Planning platform integrates digital twin modeling, network optimization, demand modeling, and transportation planning with broader financial operations like procure-to-pay and treasury.

Recent updates and announcements include:

- **New Executive Officers.**

  Coupa appointed Salvatore Lombardo as CPTO to lead innovation, scaling, and product strategy, bringing deep experience from SAP Ariba and SAP S/4HANA. John Frank joined Coupa as CCO to oversee global customer success, with a background in scaling service organizations at Infor, Adobe, and Hitachi.

- **Agentic AI Updates.**

  Coupa rolled out over 100 new AI-driven features to support autonomous spend management, including Contract Intelligence, which is an enhanced AI-driven contract analysis and field extraction, and Rapid Network Explorer, which is an accelerated supply chain scenario generation and decision-making. Navi AI Assistant: Evolved into the primary entry point for Coupa's agentic AI platform. Supply Chain Agents: Tools for building digital twins, network models, and supply chain scenarios. Analytics Agent: Generates data tables and charts from natural language queries. Document Discovery Agent: Surfaces pending documents for faster processing. Knowledge Agent: Provides immediate answers on sourcing and spend policies.

- **Supplier Collaboration Enhancements.**
  The software vendor expanded inventory collaboration tools, now allowing suppliers to monitor customer stock levels to reduce safety stock and carrying costs.

Coupa acquired Cirtuo, an AI-based category management provider, expanding its strategic sourcing and supplier planning capabilities.

- **Smart Intake and Orchestration Launched.**
  Coupa launched a business process mapping tool to govern AI agent behavior, ensuring agents follow documented workflows and provide accurate, policy-compliant recommendations.

- **Cirtuo Acquisition.**
  Coupa acquired AI-based category management provider Cirtuo to strengthen strategic sourcing and supplier planning within its spend management platform.

- **CoreTrust Partnership.**
  Coupa partnered with CoreTrust to broaden access to pre-negotiated supplier contracts and extend procurement savings opportunities for Coupa customers.

- **Ongoing Investment in Supply Chain Design and Planning.**
  Coupa introduced new tools for faster scenario modeling and real-time decision support, building on its acquisition of Llamasoft for supply chain network design.

Coupa rolled out over 100 new AI features, expanding Coupa Navi into a full agentic AI assistant for supply chain and spend management.

FuturMaster

FuturMaster is positioned as a Core Provider in the 2025 SCP Technology Value Matrix, recognized for its Bloom platform, which delivers integrated supply chain planning capabilities to organizations in process manufacturing, discrete manufacturing, and retail. The platform supports strategic, mid-term, and short-term planning through modules for sales and operations planning (S&OP), demand planning, procurement planning, and inventory optimization. S&OP aligns sales, marketing, manufacturing, sourcing, and finance teams to support unified business objectives. At the same time, demand planning uses advanced analytics and machine learning to cleanse data, apply the most accurate forecasting models, and integrate sell-through data for improved demand sensing. The Bloom platform also offers procurement planning for complex, multi-source networks by accounting for supplier constraints, minimum order quantities, and transportation capacities. Its global optimization engine integrates decisions across the supply chain, enabling consistent planning from strategic to operational levels. Horizontal collaboration with partners and vertical integration of long-term and short-term planning support greater agility, efficiency, and resilience across the supply network.

FuturMaster's Bloom platform provides end-to-end supply chain planning for process and discrete manufacturing as well as retail.

Updates over the last 12 months:

- **Sagard NewGen Acquires FuturMaster**
  In October 2024, Sagard NewGen acquired a majority stake in FuturMaster to accelerate global growth. The deal supports FuturMaster's ambition to expand internationally, strengthen its SaaS supply chain planning platform, and enhance its AI and digital

capabilities. twin capabilities. Former CEO Bo Zhou stepped down, and Yacine Zeroual is now leading the company.

With the acquisition of PlaniSense, FuturMaster integrated real-time production scheduling into Bloom, creating a combined demand, supply, and scheduling solution.

- **FuturMaster Acquires PlaniSense**
  In February 2025, FuturMaster acquired PlaniSense, a scheduling and production planning software provider. This integration brings real-time production scheduling into FuturMaster's Bloom platform, creating an end-to-end planning solution that combines demand forecasting, supply optimization, and scheduling in one platform. The joint solution improves responsiveness, operational control, and supply chain resilience.

- **FuturMaster Launches Forecast At Scale and Network Insight Graph**
  Throughout 2024, FuturMaster rolled out Forecast At Scale, a solution for improving large-scale forecast accuracy, and Network Insight Graph, an analytics tool for visualizing and enhancing supply chain network resilience.

Manhattan Associates

Manhattan Associates' supply chain planning capabilities are part of the Manhattan Active Platform, which unifies planning, execution, and omnichannel logistics in a single system.

Manhattan Associates is positioned as a Core Provider in the 2025 SCP Technology Value Matrix, recognized for its supply chain planning capabilities built on the Manhattan Active Platform. The platform unifies supply chain planning, execution, and omni-channel logistics within a single environment, providing integrated functionality for order management, point of sale, store inventory and fulfillment, CRM, digital self-service, allocation, warehouse management, labor management, transportation management, yard management, demand forecasting, replenishment, and unified business planning. The SCP solution specifically offers demand forecasting, replenishment, allocation planning, and unified business planning, which combines sales and operations planning (S&OP) with execution (S&OE) for a more responsive supply chain. Manhattan Associates supports organizations across wholesale, consumer goods, grocery, manufacturing, medical and pharmaceutical, retail, and trucking industries.

Updates over the last 12 months:

- **Shopify Partnership Expansion.**
  Manhattan launched a connector app integrating Manhattan Active Order Management with Shopify. This enables real-time inventory visibility, fulfillment status, and payment processing, improving omnichannel fulfillment for enterprise retailers. Several large retailers are already live with the connector, enhancing customer

experience with services like BOPIS, same-day delivery, and curbside pickup.

- **Enterprise Promise and Fulfill Launch.**
  Manhattan introduced Enterprise Promise & Fulfill, a cloud-native solution that extends existing ERP environments with advanced inventory visibility, order promising, and fulfillment optimization. The solution addresses challenges like fragmented order orchestration, limited inventory insight, and costly fulfillment processes, helping B2B sellers improve revenue, operational efficiency, and customer satisfaction without major ERP overhauls.

- **Google Cloud Partnership Expansion.**
  All Manhattan Active solutions became available on Google Cloud Marketplace. The expanded partnership allows for simplified procurement, faster deployment, and AI-driven innovations across Manhattan's supply chain and commerce solutions, helping customers accelerate digital transformation with scalable, secure infrastructure.

- **Agentic AI and Agent Foundry Introduction.**
  Manhattan announced new Agentic AI capabilities within Manhattan Active solutions, including intelligent digital agents like the Intelligent Store Manager, Labor Optimizer Agent, and Virtual Configuration Consultant. The company also launched Agent Foundry, a development platform enabling customers to build and deploy custom AI agents tailored to their supply chain operations.

- **Executive Changes.**
  Eddie Capel retired as President and CEO, transitioning to Executive Vice Chairman of the Board. Eric Clark, former CEO of NTT Data North America, succeeded him, bringing extensive experience in enterprise technology, operations transformation, and global leadership to Manhattan. Longtime Board members John Huntz and Deepak Raghavan retired, with Eddie Capel named Executive Chairman and Thomas Noonan appointed Lead Independent Director. Danielle Sheer also joined the Board, bringing expertise in data protection and enterprise software to support Manhattan's growth and governance priorities.

- **Postgame Spotlight Product Launch**
  Manhattan introduced Postgame Spotlight, an analytics tool within Manhattan Active Order Management. The tool provides real-time insights into inventory allocation decisions that limit fulfillment.

Manhattan introduced Agentic AI capabilities and the Agent Foundry development platform, allowing users to deploy custom AI agents for operations like labor optimization, store management, and configuration.

Manhattan expanded its Shopify partnership, enabling real-time inventory and omnichannel fulfillment for BOPIS, same-day delivery, and curbside pickup.

Performance, helping retailers reduce costs, eliminate inefficiencies, and improve profitability by optimizing inventory placement.

QAD

QAD is recognized as a Core Provider in the 2025 SCP Technology Value Matrix for its Connected Supply Chain offering, which delivers planning, supplier collaboration, transportation, execution, and commerce capabilities for industries such as consumer goods, food and beverage, process manufacturing, life sciences, automotive, and high-tech. The QAD Digital Supply Chain Planning (DSCP) platform supports demand, production, financial, S&OP, procurement, distribution, and broader supply chain planning in a unified system. Integrated supplier management tools help reduce manual processes, improve communication, and lower the risk of disruptions by enabling real-time data sharing across the network. Additional capabilities from QAD Automation Solutions, QAD SRM, and QAD Global Trade and Transportation Execution (GTTE) allow users to automate procurement, manage shipments, screen suppliers, and improve overall supply chain efficiency.

QAD's Connected Supply Chain offering integrates planning, execution, supplier collaboration, and transportation in a unified system. The Digital Supply Chain Planning (DSCP) platform spans demand, production, financial, procurement, and distribution planning.

Updates over the last 12 months:

- **Platform Enhancements.**
  Over the last 12 months, QAD has delivered several key enhancements to its Digital Supply Chain Planning (DSCP) platform to improve usability, AI integration, and overall planning efficiency. Recent updates include expanded analytics capabilities to provide deeper visibility into supply chain performance and the introduction of promotion planning tools to better align demand with promotional events.

- **Ready-To-Plan (RTP) Deployment Methodology.**
  To simplify deployments, QAD introduced Ready-to-Plan (RTP) with standardized access, shared screens, and preconfigured best practices, making it easier for organizations to implement DSCP quickly and efficiently. The platform's machine learning capabilities have also been enhanced with new transparency features, providing users with better visibility into how AI and ML models influence planning recommendations.

- **AI/ML Updates.**
  QAD has embedded AI/ML across multiple DSCP functions, including master data cleansing, automatic clustering, and Classification, demand sensing, and forecast generation with

QAD embedded AI/ML into core DSCP functions, adding features like automatic data cleansing, clustering, demand sensing, and forecast generation.

scenario evaluation. These capabilities improve data quality and enhance forecast accuracy by enabling responsive, AI-driven insights.

- **Champion AI Knowledge Assistant**
  In 2024, QAD launched Champion AI Knowledge Assist, a conversational AI assistant designed to guide users through system processes and provide contextual recommendations using natural language. This aligns with QAD's broader AI strategy, which is focused on improving the transparency, explainability, and accessibility of AI in supply chain operations.

- **UX Updates.**
  The user experience has also seen significant improvements, with a modern interface supporting social collaboration, workflow management, geospatial insights, advanced analytics, and connected, mobile-first access. These upgrades are designed to improve productivity and simplify day-to-day interactions with the DSCP platform.

- **Advanced Scheduling Updates.**
  In Advanced Scheduling, QAD enhanced its ability to align production planning with weekly scheduling. Organizations can now determine weekly production quantities based on available capacity and optimize the sequence of production within each week to maximize efficiency.

QAD introduced Ready-to-Plan (RTP) to simplify deployments through standardized templates and shared best practices.