

Magic Quadrant pour les plateformes de visibilité en temps réel sur les transports

24 février 2025 - ID G00814199 - 30 min de lecture

Par Carly West , Oscar Sanchez [Duran](#) et [1 autre](#)

La visibilité en temps réel sur le transport reste une priorité essentielle pour les expéditeurs, les prestataires logistiques et leurs clients. Les leaders de la technologie de la chaîne d'approvisionnement peuvent utiliser cette étude pour mieux comprendre les tendances actuelles du marché et les fournisseurs sur le marché des plateformes de visibilité en temps réel sur le transport.

Définition/Description du marché

Gartner définit le marché des plateformes de visibilité en temps réel sur le transport (RTTVP) comme des plateformes qui fournissent des informations en temps réel sur la localisation et le statut des commandes une fois qu'elles ont quitté l'entrepôt. Cela inclut d'autres installations, telles que celles d'un propriétaire de marque, d'un fournisseur, d'un fabricant sous contrat ou d'un prestataire de services. Ces plateformes, détenues et gérées par des éditeurs de logiciels tiers, représentent une partie du marché de la visibilité de la chaîne d'approvisionnement qui s'adresse principalement, mais pas uniquement, aux modes de transport routier nationaux. Les RTTVP obtiennent des données par intégration (via API ou échange de données informatisé [EDI], par exemple) avec les systèmes des transporteurs, des flux directs de télématique (dispositifs embarqués dans la cabine ou dans la remorque) ou d'autres technologies ou applications.

Les RTTVP sont utilisés pour obtenir en temps quasi réel le statut et la localisation des expéditions en transit, ainsi que les heures d'arrivée estimées prédictives. Ces informations peuvent être utilisées en interne, ainsi qu'en externe, pour informer et mettre à jour les deux

types de clients concernant les retards d'expédition, les heures d'arrivée estimées (ETA) et les statuts. Les cas d'utilisation peuvent varier en fonction du type d'organisation et de la complexité de son réseau de transport. Les niveaux de complexité ou les cas d'utilisation typiques sont les suivants :

Niveau 1 de complexité

La complexité RTTVP de niveau 1 s'applique aux situations où les entreprises ont besoin de visibilité dans une région pour un seul mode de transport.

Niveau 2 de complexité

La complexité RTTVP de niveau 2 se produit lorsqu'une entreprise a besoin de visibilité sur plusieurs modes gérés à partir d'une seule région.

Niveau 3 de complexité

La complexité RTTVP de niveau 3 se produit lorsqu'une entreprise a besoin de visibilité dans plusieurs régions sur plusieurs modes.

Niveau 4 de complexité

Au niveau de complexité RTTVP de niveau 4, une entreprise a besoin d'une visibilité globale sur tous les modes.

Niveau 5 de complexité

Dans le niveau de complexité RTTVP de niveau 5, les entreprises bénéficient d'une visibilité globale sur tous les modes et utilisent toutes les fonctionnalités avancées de la plateforme.

Caractéristiques obligatoires

Les capacités indispensables pour ce marché incluent :

1. Un produit RTTVP autonome vendable et implémentable.
2. Visibilité du transport routier parmi les autres modes.
3. **Suivi de base** — Localisation et statut de l'expédition en transit
4. **Messagerie/alertes** — Notifications de retards et de changements de statut

5. **ETA prédictive** — Algorithme permettant de prédire l'ETA à l'aide d'informations en temps réel et historiques en **transit** avec des facteurs externes tels que le trafic et la météo, indépendamment de l'ETA fournie par d'autres parties, par exemple

Caractéristiques communes

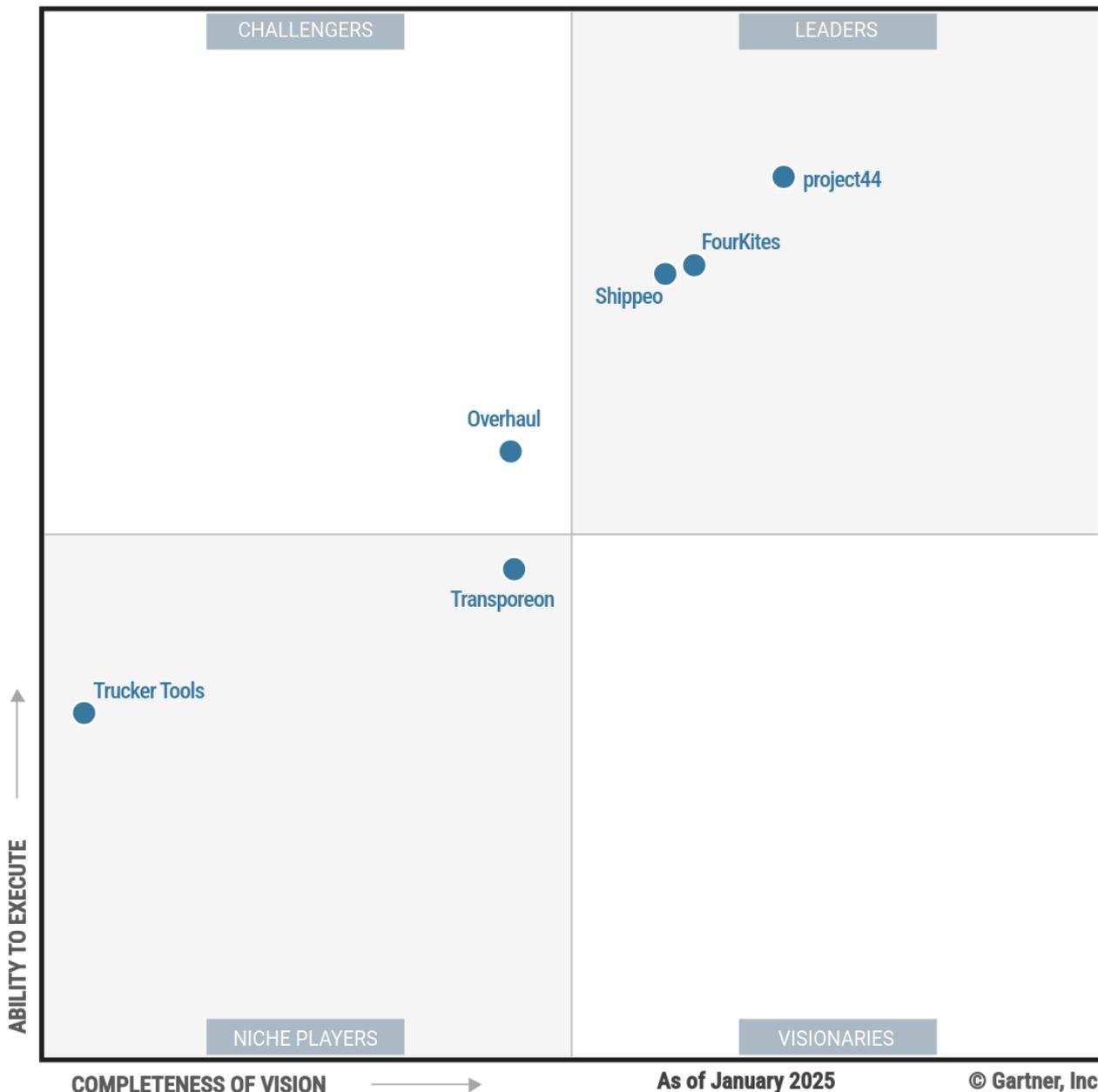
Les fonctionnalités optionnelles pour ce marché incluent :

- **Capture de commande** — Capture des informations de commande et d'expédition à partir de systèmes hôtes, comme un système de gestion des transports (TMS), un ERP ou un système de gestion d'entrepôt (WMS)
- **Nettoyage des données/conformité des données** — Surveillance des données pour en vérifier l'exactitude, l'exhaustivité, la cohérence, la fiabilité et l'actualité
- **Tableaux de bord** — Différentes vues de données et de rapports pour faciliter la tâche de l'utilisateur
- **Réseaux de transporteurs/intégration** — Intégration directe aux transporteurs pour le suivi des informations, indépendamment des appareils ou des applications mobiles
- Analyses et rapports avancés
- Visibilité en réseau
- Collaboration
- Des informations prédictives
- Calculs de durabilité

Quadrant magique

Figure 1 : Magic Quadrant pour les plateformes de visibilité en temps réel sur les transports





Gartner.

Points forts et précautions du fournisseur

FourKites

FourKites est un leader dans ce Magic Quadrant. La plateforme FourKites offre une visibilité sur tous les modes d'expédition et s'étend également au-delà de la visibilité sur le transport en offrant plusieurs fonctionnalités étendues. Elle est fortement présente en Amérique du Nord et en Europe, avec une présence de certains clients dans d'autres régions. Elle compte des clients dans de nombreux secteurs, avec une forte présence dans les secteurs de l'alimentation et des boissons, des biens de consommation emballés (CPG), des produits chimiques, de la fabrication, du papier et de l'emballage, des produits pharmaceutiques et

de la vente au détail. Les innovations récentes et prévues comprennent des améliorations dans le suivi de la qualité et de la fiabilité et des initiatives d'IA pour l'automatisation des flux de travail et des tâches.

Points forts

- **Stratégie d'offre (produit)** : le produit de FourKites va au-delà de la fourniture de toutes les fonctionnalités de base d'un RTTVP en offrant un vaste réseau de transporteurs et de nombreuses fonctionnalités étendues. Certaines de ces fonctionnalités incluent la visibilité des commandes et des stocks, le code de motif de retard , la visibilité du réseau pour les expéditions entrantes et la gestion dynamique du parc.
- **Opérations** : FourKites fait état de périodes d'occupation du personnel plus longues que la moyenne dans de nombreux services de l'organisation. Cela pourrait être lié à une meilleure expertise du secteur, à une meilleure compréhension des défis des clients et à une stabilité pour les clients au fil du temps.
- **Viabilité globale** : FourKites reste l'un des plus grands fournisseurs de RTTVP en termes de chiffre d'affaires, de nombre de clients et de portée géographique. Son récent accent sur la gestion financière a porté ses fruits, puisque l'entreprise est devenue rentable en 2024 et a déclaré un flux de trésorerie positif avec une dette nulle.

Précautions

- **Sales strategy**: FourKites grew at a slower-than-average rate in 2024, compared with some of its competitors, although it remains one of the largest RTTVP vendors.
- **Customer experience**: The vendor has undergone efforts to streamline and improve support in this evaluation period. However, Gartner's client inquiries and Gartner Peer Insights reviews indicate that some FourKites users have reported unsatisfactory experiences with its service and support for technology deployment and live operations. As with any RTTVP, prospects and users should clearly understand their role in ensuring data quality and consistency as the contract owners with logistics service providers (LSPs).
- **Sales execution/pricing**: FourKites reports fewer partnerships with resellers, systems integrators (SIs) and consultants, compared with other vendors in this research. This limited utilization of resellers and consultants to promote and implement its solution could impact growth in the future.

Overhaul

Overhaul is a Challenger in this Magic Quadrant. The Overhaul platform offers a combination of transportation visibility and risk management capabilities across all shipping modes. Its solution provides actionable insights that focus on anticipating and preventing risks associated with movement of goods. It has a primary presence in North America and Europe, with some customer presence in South America and Asia. Overhaul has customers in many industries, including high tech/consumer electronics, life science/pharmaceuticals, retail and LSPs. Recent and planned innovations include the use of generative AI (GenAI) and risk intelligence for advanced pattern detection to identify shipments that need urgent attention, and a prescriptive analytics suite to provide network visibility.

Strengths

- **Offering (product) strategy:** Overhaul continues to have a unique approach to minimizing and preventing risks for in-transit transportation movements. Its platform provides capabilities that go beyond transportation visibility, including risk prevention, compliance and insurance.
- **Product or service:** Overhaul offers market-leading risk management capabilities. It is the only vendor in this research that offers specialized security services. Overhaul connects with insurance companies and police departments in some countries to provide an extra level of protection for high-value shipments and opportunities to reduce insurance costs.
- **Vertical/industry strategy:** Overhaul continues to attract new customers both within its key industries and in new verticals, such as industrial manufacturing, automotive and wholesale distribution. The vendor effectively blends product capabilities, industry partnerships and channel partners to deliver tailored, industry-specific solutions.

Cautions

- **Sales execution/pricing:** Overhaul's subscription costs are higher than some of its competitors. Potential customers should evaluate whether the higher costs are acceptable, based on Overhaul's unique capabilities.
- **Geographic strategy:** Overhaul has a relatively small presence in Asia and South America, compared with other vendors in this research, as it focuses on reaching more customers in North America and Europe.

- **Overall viability:** Overhaul has not yet achieved its near-term target of becoming profitable, despite strong revenue and customer acquisition in 2024.

project44

project44 is a Leader in this Magic Quadrant. Its platform leverages an API-first approach to build network and carrier connectivity, providing a visibility platform that includes a large multimodal network. It provides real-time information, ETAs and predictive insights across all shipping modes. Most of its customers and operations are in North America and Europe, with some presence in the Asia/Pacific (APAC) and other regions. project44 has customers in many industries, with a large presence in LSP, industrial manufacturing and retail. Recent and planned innovations center around AI, including bots, agents, task and exception management automation, and data quality enhancements, along with expanded reports and dashboards.

Strengths

- **Innovation:** project44 invests a relatively high amount of its RTTVP technology revenue in research and development, compared with other vendors in this research, and it has a large number of dedicated RTTVP development engineers. It has a strong product roadmap for 2025 and completed the largest percentage of 2024 product roadmap items, compared with the other vendors in this research.
- **Offering (product) strategy:** project44's platform provides all core RTTVP capabilities and many extended capabilities. Its network is one of the largest, with an extensive carrier network and partner network, and one of the highest volumes of shipments being tracked annually.
- **Sales execution/pricing:** project44 is one of the largest RTTVP vendors in terms of total revenue and revenue growth in 2024, and number of customers and presence in deals.

Cautions

- **Customer experience:** Within Gartner client inquiries, some users expressed concerns about project44's shipment tracking quality and consistency. Although customer feedback has improved year over year, prospects and users should clearly understand their role in ensuring data quality and consistency as the contract owners with LSPs.
- **Operations:** project44 reports below-average employee tenure, compared with other vendors in this Magic Quadrant.

- **Overall viability:** project44 is not yet profitable, despite strong revenue and customer numbers.

Shippeo

Shippeo is a Leader in this Magic Quadrant. The Shippeo platform facilitates collaboration between shippers, third-party logistics companies (3PLs) and carriers across all shipping modes, with an emphasis on data quality and ETA accuracy. Shippeo's customers are mostly in Europe, but it has expanded in other regions such as North America, APAC and the Middle East. Shippeo has presence in industries such as retail, industrial manufacturing, LSP, automotive, CPG and chemicals. Recent and planned innovations include disruption alerts and risk management dashboards, a road-tracking reliability index to improve the quality and completeness of location data, and enhancements to ETA predictions.

Strengths

- **Product or service:** Shippeo's focus on data quality has become a key differentiator for its platform, as it ensures highly accurate ETA predictions and has created a foundation for further automation capabilities. The platform provides multiple dashboards and analytics tools to quantify the impact of data quality issues, identify the root cause of those issues and provide suggestions on how to resolve them.
- **Business model:** Shippeo has focused on data quality in recent years, which has become a key differentiator of its product. This establishes a strong foundation now that the vendor is moving to provide further automation capabilities.
- **Market responsiveness and record:** Shippeo has a strong track record for delivering on business objectives and metrics when it comes to predicting ETAs. Shippeo remains the only vendor in this Magic Quadrant offering contractual SLAs on ETA accuracy, tracking accuracy and carrier onboarding.

Cautions

- **Overall viability:** Shippeo has not yet become profitable, despite continuing to show strong revenue and customer growth.
- **Marketing execution:** Despite Shippeo's increased marketing budget, its brand recognition outside of Europe lags the other Leaders in this research. This is demonstrated by lower web traffic, social media followers and search queries.

- **Geographic strategy:** Shippeo continues to trail the other leaders in this research when it comes to overall geographic reach. In 2024, it continued to dominate in Europe and grew in North America in terms of revenue and number of customers; however, it has yet to establish a sizable presence in other regions.

Transporeon

Transporeon, a Trimble company, is a Niche Player in this Magic Quadrant. The Transporeon platform provides real-time data, ETAs and predictive insights on all shipping modes, excluding rail (outside of Europe) and parcel air. Transporeon offers complementary products in areas such as transportation and yard execution, sustainability, freight audit, and freight procurement. Most of Transporeon's customers and operations are in North America, Europe and the APAC region, with some presence in other regions. Its customers span many industries, with the largest presence in industrial manufacturing, CPG, petrochemicals and high tech/consumer electronics. Recent and planned innovations center around AI to support predictive analytics, model coverage and user interface (UI) improvements.

Strengths

- **Offering (product) strategy:** Transporeon offers a wide range of functionality, including transportation execution, sourcing, freight audit and yard management, to support both shipper and carrier/private fleet transportation.
- **Vertical/industry strategy:** Transporeon has a presence in many industries, including CPG, industrial manufacturing, high tech and petrochemicals.
- **Overall viability:** Transporeon is one of the few RTTVP vendors that has a track record of profitability over the past several years.

Cautions

- **Product or service:** Transporeon does not offer visibility into air parcel and rail transportation outside of Europe. Prospects and customers that need visibility into these modes should plan to supplement with an additional platform or seek an alternative.
- **Geographic strategy:** Transporeon has been relatively slow to expand in Central and South America compared to other vendors in this research, as its sales approach has focused on growth in North America and Europe.

- **Sales execution/pricing:** In 2024, Transporeon's RTTVP-specific growth — in terms of new customer deals and revenue — was smaller than some vendors in this research. This is partly driven by the vendor's approach to bundling products and capabilities together. Visibility is often sold in combination with other offerings.

Trucker Tools

Trucker Tools is a Niche Player in this Magic Quadrant. Its platform provides visibility into brokered loads through the use of an app for drivers. It offers load board and capacity tools to help brokers find truckload capacity information and load booking. Trucker Tools offers visibility into only over-the-road (OTR) truckload shipments and operates in North America, with a small presence in Central America. Its customer base is mostly LSPs, with a small presence in industrial manufacturing, CPG and wholesale industries. Recent and planned innovations include a fraud toolkit, revamped load track interface, text-to-track improvements and expanded carrier sourcing.

In December 2024, Trucker Tools was acquired by DAT Freight & Analytics.

Strengths

- **Market understanding:** Trucker Tools focuses on drivers, and the driver experience is a differentiator for the company. Its platform includes an app with more than 20 tools that deliver benefits to drivers. Trucker Tools also provides better visibility into brokered loads compared to some vendors.
- **Product or service:** Trucker Tools continues to have a unique, OTR focus on maximizing truckers' asset utilization. The platform also enables capacity sourcing and digitizes all carrier interactions to help brokers.
- **Business model:** Trucker Tools focuses on owner operators and small-to-midsize carriers, primarily in North America. It has one of the largest carrier networks in this segment of the market.

Cautions

- **Offering (product) strategy:** Trucker Tools focuses primarily on brokers and LSPs and does not provide capabilities for intermodal, rail, parcel and last mile. Prospects and customers who are in other industries and need visibility into these modes should plan to supplement with an additional platform or seek an alternative.

- **Geographic strategy:** Trucker Tools' customer base and operations are primarily in North America. It has a small presence in Latin America, but no customers or carriers in any other regions. Prospects and customers outside North America and Central America should seek alternatives until Trucker Tools expands into their region.
- **Operations:** Trucker Tools has the fewest shipper customers, compared with other vendors in this research. Its presence is highly concentrated in the third-party logistics (3PL), broker and carrier industries, because most of its customers are LSPs. It has developed tools to support this niche market, but has yet to expand its capabilities to meet the needs of customers in other industries.

Vendors Added and Dropped

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

Added

- Transporeon

Dropped

- Blume Global was dropped from this Magic Quadrant due to a lack of publicly available information to make an inclusion determination or score its Ability to Execute and Completeness of Vision.
- IntelliTrans was dropped from this Magic Quadrant due to not meeting the inclusion criteria for carrier network size.

Inclusion and Exclusion Criteria

To be included in this year's RTTVP Magic Quadrant, a vendor must offer the following:

- A credible, stand-alone RTTVP product, live customers and vision for shipper and non-asset-based 3PL. **The RTTVP must include** at least domestic transportation visibility, analytics, transportation management system (TMS) integration, a solid carrier network, basic tracking, messaging/alerts, predictive ETA, data cleansing and dashboards.
 - Gartner evaluates vendors' support for the following shipping modes — over-the-road full truckload (FTL) and less than truckload (LTL), rail, intermodal, barge, small package, ocean, air, and private and dedicated fleet.
- **RTTVP market presence:** An RTTVP that is sold as a stand-alone, self-serve application and is used by the buyer, independent of other services offered by the vendor.
- **Global presence:** The vendor must meet *all* of the following criteria:
 - RTTVP customer references in at least two of the following geographic regions: North America; Central America; South America; Europe, the Middle East and Africa (EMEA); and the APAC region.
 - Twenty or more RTTVP customers outside of its home geographical region.
 - Ability to implement and support customers in those other regions.
- **Carrier network:** Ten thousand or more carriers connected to its network, with at least 5,000 of the carriers being connected through **direct integration to carriers**, not solely by use of the vendor's mobile application, other Internet of Things (IoT) device connections or web portal.
- **Cross-industry presence:** New and existing RTTVP customers in five or more industries. Examples include 3PL/logistics services, consumer goods, retail, wholesale distribution, high tech, oil and gas, aerospace and defense, automotive, chemicals, life sciences/medical devices, healthcare, and industrial products.
- **Vendor momentum and sustainability criteria based on revenue, subscription or customer growth:** The vendor must meet *one* of the following criteria:
 - Previous fiscal year combined RTTVP subscription and service revenue of greater than \$10 million.
 - Current subscription and service revenue of greater than \$5 million and a three-year compound annual customer and revenue growth rate of at least 25%.

- **Number of shipments:** The vendor must have 2 million or more shipments transacted on its RTTVP in 2023, and more than 3 million tracked from 1 January through 30 August 2024.
- **Current RTTVP customers:** The vendor must meet *all* of the following criteria:
 - Must have at least **50 live RTTVP** customer** references independently and holistically using the RTTVP stand-alone solution being evaluated. Those should have contracted the RTTVP stand-alone solution for evaluation in this Magic Quadrant, either as stand-alone software or as part of an application bundle. Customers using other products and leveraging the RTTVP capabilities as a free add-on shall not be included in the customer count.
 - At least **10 new live paying customers**** sold and closed in 2024.

*** A customer is defined as a single legal entity who holds a contractual agreement for use of the system directly with the vendor. The customer independently and holistically uses the RTTVP stand-alone solution being evaluated. This does not include customers using other products sold by the vendor and getting visibility as a free add-on. Gartner does not count customers of reseller partners or service provider clients for the purpose of this MQ.*

Due to end-user demand for evaluations of other significant vendors' RTTVP offerings, we also consider inclusion of RTTVP vendors that meet the following criteria, even if the offering does not meet the initial RTTVP-specific criteria:

- **Unique and compelling market position in a specific vertical industry or geography:** The vendor must have a unique, compelling and differentiated market position in a specific vertical industry or geography, where this differentiation is important to buyers. New customer win rates, vendors appearing in Gartner client inquiries in these industries or geographies, explicit vendor focus in these industries or geographies, client references, and the vendor's reputation in the industry or geography were also considered. These vendors must also meet the revenue and number-of-customer criteria.

This Magic Quadrant does not include other stand-alone transportation-related software applications (such as track-and-trace solutions, telematics solutions and TMS solutions).

This Magic Quadrant does not include any vendor that does not sell RTTVP as a stand-alone solution. If a vendor sells RTTVP in addition to other technology offering or services, they will

only be considered if they sell RTTVP as a stand-alone solution and meet all the inclusion criteria for that solution alone.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate providers based on the quality and efficacy of their processes, systems, methods or procedures. This evaluation seeks to determine the extent to which they enable the technology provider's performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation within Gartner's view of the market.

Ability to Execute Evaluation Criteria

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

Source: Gartner (February 2025)

Completeness of Vision

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements. This includes statements on current and future market direction, innovation, and customer needs and competitive forces, and how well they map to Gartner’s view of the market.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (February 2025)

Quadrant Descriptions

Leaders

Leaders have a compelling vision and a reliable Ability to Execute. Leaders in the RTTVP market have broad, deep and differentiated functionality that addresses a broad range of

user requirements. These vendors have proven products and track records of customer success, and have demonstrated momentum in growing their market presence. Leading vendors support transportation visibility strategies for large customers with substantial freight volumes, as well as demonstrate their ability to deploy their solutions to smaller shippers. Leaders should also offer adaptable technical architectures that allow for rapid innovation, which is needed to stay ahead of market demands.

Leaders are innovators with compelling strategies for addressing the ongoing market changes related to the emergence of new technologies, expanded model support and support for global transportation operations. Leaders are also furthest ahead in supporting the transportation needs of multiple geographies and adding capabilities to support the more complex needs of multileg global logistics and transportation. Leaders listen to their customers; but, just as importantly, their customers look to them for thought leadership, and they establish symbiotic relationships.

Key characteristics:

- Broad and deep RTTVP offering
- Participation in a high percentage of new deals
- A strong and consistent track record
- Consistent performance and vigorous client growth and retention
- Enduring visibility in the marketplace, from both sales and marketing perspectives
- Broad and deep carrier network
- Presence across a large number of industries
- Proven ecosystem of partners
- Global scale

Challengers

Challengers offer reliable RTTVP solutions and have a historically reputable presence in generally supporting moderately complex transportation visibility requirements. However, Challengers trail Leaders in certain aspects of RTTVP, such as technology, functional breadth, modal support, global geographic presence, momentum and recognition in the

RTTVP market. Challengers may have reasonable RTTVP functional breadth or depth, but they may lack functionality in some areas, such as global multimodal visibility, appointment scheduling, yard management, data quality or certain aspects of advanced analytics. Challengers are often followers that introduce emerging capabilities only after these capabilities have been established in the market by more innovative vendors, or they focus on a different subset of functionality not always largely in demand. In addition, Challengers trail Leaders in the depth and breadth of their carrier networks and technology partners.

Key characteristics:

- Capable, proven RTTVP solution, with numerous live customers
- Consistent track record of successful implementation
- Offerings that are not as broad or as deep as RTTVP Leader offerings
- Lacking or trailing in carrier networks and technology partners
- Lacking the same global scale as RTTVP Leaders

Visionaries

Visionaries have a compelling vision for achieving a differentiated position in the RTTVP market, possess strong visibility, vision and capabilities, and are innovating beyond basic RTTVP capabilities. However, they lack certain characteristics in their Ability to Execute.

Visionaries might have compelling product strategies, but they lack market momentum, have too few live customers, have functional gaps in their RTTVP, or lack the market presence to move higher in their Ability to Execute. At a minimum, solutions in the Visionaries Quadrant fall into one of two broad categories. They can be established RTTVP offerings that have yet to mature into leading positions in the market, or they can be innovative offerings from specialist vendors with unique and potentially disruptive views of where the market is going. These vendors can exhibit innovation in RTTVP products, services, or go-to-market and deployment strategies, but lack innovation in other areas.

Key characteristics:

- Coherent, compelling and innovative strategy that seeks to deliver a robust and vibrant offering to the market

- Thought leader in one or more RTTVP solution dimensions that tend to be on the leading edge of emerging concepts
- Not yet demonstrating an ability to handle a broad range of user requirements
- Execution gaps or lack of global scale
- Innovation in RTTVP products, services, go-to-market strategy, and vertical or deployment strategies

Niche Players

All RTTVP solutions in this Magic Quadrant support core RTTVP capabilities across multiple for-hire modes of transportation, including those of vendors in the Niche Players quadrant. Niche Players are often functionally satisfactory for many users, smaller shippers or companies with moderate visibility complexity or sophistication. Niche Players could well be the best choice for these types of users. However, these vendors offer solutions lacking the full depth, breadth or robustness of functionality demanded by the most complex and sophisticated RTTVP users; might have limited global presence; or lack a persuasive vision for RTTVP. These vendors might also lack the experience, number of clients, customer references or business viability of the leading vendors in the market. Yet, Niche Players are often viable or preferable for many RTTVP buyers.

Key characteristics:

- Focus primarily on a limited geography or industry
- Generally not a differentiated offering, although it can have some unique capabilities
- Not yet well-established and visible in the market
- Not a broad or deep RTTVP solution
- Market momentum, and product or company viability, that is slower than other vendors
- Lacking in carrier networks and technology partners

Context

This research focuses specifically on real-time transportation visibility platforms providing visibility to mainly domestic modes of shipping, such as FTL, LTL, intermodal, rail, small package, totes, and private or dedicated fleets. Furthermore, the emphasis in this research is on solutions that support primarily FTL and LTL visibility (as that is the biggest part of the market). All of the RTTVP providers covered in this research offer carrier connectivity to a large network of carrier companies, as well as data integration and analytics. However, transportation economics and business conditions within the market are driving companies to use visibility for more modes, which places more importance on a provider's ability to offer multiple modes of transportation for visibility. Companies are increasingly looking for a single platform for all their transportation visibility, independent of mode and region of transportation.

Shippers, LSPs or other companies investing in RTTVP should consider the following factors when looking into vendors:

- **Modal coverage:** Although the main volume of these solutions is for over-the-road transportation; organizations should also consider the vendors' capabilities for other modes, such as last-mile, intermodal, rail, parcel, ocean and air.
- **Global presence:** Gartner observes an increasing number of RFPs that offer a more global scope. Understand the regions the vendor operates in.
- **Carrier network:** The size of the carrier network and the quality and depth of the carrier connection will impact the ease of onboarding of your carriers. It will also affect the time required to go live with the solution, as well as the quality of the data and the consistency of output. Comparing the vendor carrier network to the end-user company's carrier network is important.
- **Data quality:** The goal of this solution is to receive data that will then be used to create valuable insights. It is important to understand how the vendor ensures the accuracy and quality of the data (see [Key Considerations to Improve Data Quality in Real-Time Transportation Visibility Platforms](#)).
- **TMS/ERP partnerships:** RTTVPs often work alongside a TMS or ERP solution. Having existing integrations to a TMS or ERP will speed up implementation and impact how the data can be used to drive workflows.
- **Compliance:** Connecting to an RTTVP vendor does not always guarantee carrier and data compliance, so it is important to understand how the vendor addresses this and what

SLAs they will offer to commit to the outcome. Looking at some reference customers is a good exercise to understand how a vendor achieves this.

- **Supplier network:** When looking for inbound visibility, it is also important to compare the vendor's supplier or customer network to the end-user company's suppliers. Vet for inbound shipment data sharing capabilities and willingness (see [Expand Transportation Visibility to Inbound Movements for Better-Informed Decisions](#)).

Market Overview

As supply chains continue to experience disruptions and volatility, real-time visibility into orders and shipments is a "must have" feature. Nearly every company, regardless of its size, location or industry, needs real-time location information and predictive ETAs to effectively run and manage their transport operations. To get these insights, an increasing number of companies are evaluating and implementing RTTVPs.

The RTTVP market has consolidated into a relatively small number of vendors that have built extensive, varied carrier networks to support a larger number of customers. These established vendors have taken most of the market share, either through organic growth or via mergers and acquisitions.

RTTVPs' products and services have extended beyond their traditional focus on domestic road transportation visibility within a single region (typically North America or Europe). As more customers seek a single solution that provides multimodal, worldwide transportation visibility, established RTTVP vendors are continuing to develop extended capabilities and expand their networks in new regions.

Now, most RTTVPs provide visibility into numerous shipping modes, with a big focus on ocean; and across multiple regions, with expansion into Asia/Pacific and Latin America.

Supply chain technology leaders should also be aware of four additional market trends when evaluating RTTVP vendors:

RTTVP vendors continue to build partnerships with other visibility vendors. For example, they may partner with vendors in the tracking-and-monitoring device segment to offer one view to customers, whether they need devices or not. Many RTTVP vendors have also partnered with specific ocean, rail, intermodal or barge visibility providers.

Vendors are offering “networked visibility.” Shippers can see real-time location updates on their vendor-managed (inbound) and customer pickup (outbound) freight, in addition to the already-managed freight on the platform. This gives companies full visibility across their supply chains, enabling them to enhance warehouse operations, reduce yard congestion, and improve carrier and driver productivity. Integration with suppliers for shipment information has become a key requirement in many RFPs for RTTVP customers and prospects today (see [Improve Inbound Transportation Visibility to Optimize Operations](#)).

Companies are looking for extended value from visibility, not visibility alone. End users are sharpening their focus on the data quality and the output from RTTVPs to increase productivity and efficiency across their network operations (see [Build a Strong Business Case for Real-Time Transportation Visibility Platform Investment](#)). Some questions end users are asking are:

- Are the shipments tracking as expected?
- Are the ETAs accurate enough to trust?
- Is it feasible to get accurate information from carriers?
- What effort level will it require of my team to get the data?
- What impact does it have on my supply chain?

Vendors are prioritizing development of AI functionality and capabilities in their solutions.

Most vendors are focused on the quality and output of their techniques to ensure the AI-generated recommendations and actions are applicable and usable to their customers. As AI evolves and grows, the vendors are building additional functionality to enable automation, leveraging their massive datasets to make the platforms more meaningful to customers.

Acronym Key and Glossary Terms

3PL	Third-party logistics
CPG	Consumer packaged goods
FTL	Full truckload

LSP	Logistics service provider
LTL	Less than truckload
OTR	Over-the-road
RTTVP	Real-time transportation visibility platforms
TMS	Transportation management system

⊕ Evidence

⊕ Evaluation Criteria Definitions

© 2025 Gartner, Inc. et/ou ses filiales. Tous droits réservés. Gartner est une marque déposée de Gartner, Inc. et de ses filiales. Cette publication ne peut être reproduite ou distribuée sous aucune forme sans l'autorisation écrite préalable de Gartner. Elle contient les opinions de l'organisme de recherche de Gartner, qui ne doivent pas être interprétées comme des déclarations de fait. Bien que les informations contenues dans cette publication aient été obtenues auprès de sources considérées comme fiables, Gartner décline toute garantie quant à l'exactitude, l'exhaustivité ou l'adéquation de ces informations. Bien que les recherches de Gartner puissent aborder des questions juridiques et financières, Gartner ne fournit pas de conseils juridiques ou d'investissement et ses recherches ne doivent pas être interprétées ou utilisées comme telles. Votre accès et votre utilisation de cette publication sont régis par [la politique d'utilisation de Gartner](#). Gartner est fier de sa réputation d'indépendance et d'objectivité. Ses recherches sont produites de manière indépendante par son organisme de recherche sans apport ni influence d'un tiers. Pour plus d'informations, voir « [Principes directeurs sur l'indépendance et l'objectivité](#) ». Les recherches de Gartner ne peuvent pas être utilisées comme intrants pour la formation ou le développement de l'intelligence artificielle générative, de l'apprentissage automatique, des algorithmes, des logiciels ou des technologies connexes.

