Magic Quadrant pour les systèmes de gestion d'entrepôt

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Les fournisseurs de WMS rivalisent pour répondre aux exigences critiques du marché, telles que la réduction des coûts, la prise en charge de l'automatisation et de la robotique, la convivialité, l'adaptabilité et les services cloud. Les leaders des technologies de la chaîne d'approvisionnement peuvent s'appuyer sur cette étude pour comprendre l'état actuel du marché des WMS et obtenir des informations sur les fournisseurs.

Définition/Description du marché

Gartner définit un système de gestion d'entrepôt (WMS) comme une application logicielle qui permet de gérer et d'exécuter intelligemment les opérations d'un entrepôt, d'un centre de distribution (DC) ou d'un centre de traitement des commandes (FC).

Les opérations WMS exploitent nativement les appareils mobiles, ainsi que les codes-barres et potentiellement la RFID ou d'autres technologies de lecture/détection, pour former la base transactionnelle de la gestion d'entrepôt. Cela permet d'optimiser l'efficacité des tâches dirigées et de fournir des informations précises en temps quasi réel. Les fonctionnalités clés du WMS répondent, entre autres, aux besoins de réception, de rangement, de stockage, de comptage et de prélèvement, d'emballage et d'expédition des marchandises. Gartner inclut également des fonctionnalités intégrées supplémentaires proposées par les fournisseurs de WMS, au-delà du WMS principal . Ces fonctionnalités WMS étendues peuvent inclure des fonctionnalités plus avancées, telles que la gestion de la main-d'œuvre ou l'optimisation de la localisation des stocks au sein d'une installation.

Caractéristiques obligatoires

- Réception
- Inspection/qualité
- Ranger
- Cross-docking
- Localisation des stocks
- Gestion des stocks
- Gestion de l'emplacement
- Réapprovisionnement
- Répartition des commandes
- Cueillette
- Planification/gestion des vagues
- Mise en scène
- Emballage
- Chargement de camions
- Manifestation
- Comptage cyclique
- Expédition
- Interfaces d'équipements de manutention automatisés (MHE)

Caractéristiques communes

- Gestion de la main-d'œuvre
- Intercalation des tâches
- Rainurage
- Gestion de cour

- Prise de rendez-vous au quai
- Sélection vocale
- Manifestation de colis
- Services à valeur ajoutée, tels que la fabrication légère/le kitting
- Facturation de la logistique tierce partie (3PL)

Quadrant magique

Figure 1 : Magic Quadrant pour les systèmes de gestion d'entrepôt

Points forts et précautions du fournisseur

Bleu là-bas

Blue Yonder est un leader dans ce Magic Quadrant. Il s'agit du plus grand fournisseur de suites de gestion de la chaîne logistique (SCM) dans cette évaluation, avec un chiffre d'affaires total d'environ 1,39 milliard de dollars en 2024, dont plus d'un milliard de dollars provenant des logiciels et 202 millions de dollars provenant des WMS.

Le portefeuille de solutions SCM de Blue Yonder comprend la gestion des entrepôts, la gestion de la main-d'œuvre, la gestion des transports, la planification de la chaîne d'approvisionnement, la planification de la vente au détail et la gestion des commandes.

En améliorant son portefeuille d'exécution de la chaîne d'approvisionnement (SCE), Blue Yonder a acquis Doddle pour la gestion des retours en 2023 ; flexis AG pour l'optimisation de la production et la planification du transport en février 2024 ; et a finalisé son acquisition de One Network en août 2024 pour soutenir sa vision de l'écosystème de la chaîne d'approvisionnement de bout en bout.

Blue Yonder has over 1,100 WMS customers (about one-third using its legacy Dispatcher product), with 80 global customer go-lives across 300 sites and 40 new WMS deals in 2024. Customers span 19 industries with notable strengths in consumer products, third-party logistics (3PL), retail, grocery, automotive and pharmaceuticals. Almost 50% of WMS customers are outside North America, supported by a global network of 90 implementation partners responsible for 50% of implementations.

Blue Yonder’s Warehouse Management is mainly used in Levels 3 and 4 warehouse operations but can scale from high Level 2 to Level 5 operations, where it has numerous highly automated customers. Blue Yonder is moving from an on-premises deployment model to cloud/SaaS, with about 170 customers on SaaS today and 95% of new bookings now SaaS and 30% of the installed base already deployed on cloud.

In 2022, it launched WMS services for lower-complexity environments, supported by Adaptive Fulfillment and Warehousing (AFW), which is now a part of the core WMS since 2024. Blue Yonder completed its shift of core WMS capabilities to Microsoft Azure in December 2024 and plans to go live with its first test customers in 2Q25. The vendor delivers its WMS on dedicated/single-tenant cloud, while leveraging multitenant services for machine learning (ML), platform services and non-mission-critical services. Azure is its chosen hyperscaler for all cloud deployments.

Strengths

- Blue Yonder is distinguished by the maturity, adaptability and capabilities of its core and extended WMS functionality. It is strong in workforce/labor management, traceability and performance management. It is expanding into areas like integration with manufacturing work orders, returns flows and appointment scheduling due to its acquisitions of Doddle, flexis AG and One Network.

- Blue Yonder has a growing partner network leading more than 50% of new deployments and playing a role in 70% of implementations. Key partnerships are aiding further expansion into regions like Latin America, now 16% of new deployments. This approach, along with technology partnerships for automated testing and API-based connectors, is driving more agile implementations for lower- to medium-complexity environments.

- Blue Yonder's bundled tasking and robotics capabilities (part of the Warehouse Execution System) offer accelerated robotics onboarding and an easier upgrade path for its WMS customers without having to directly integrate with robotics vendors.

- The vendor has a long track record of delivering WMS solutions to highly complex warehouse operations with a large and diversified WMS customer base of demanding and sophisticated customers. It is focused on innovations such as vision AI-supported activities and improving its slotting capabilities.

Cautions

- Legacy Dispatcher customers have no clear migration path to Blue Yonder WMS and should seek partner support to maintain stability and improve user experience while remaining on Dispatcher.

- Blue Yonder's subscription agreements can be complex and have potentially significant financial penalties for not staying current with software upgrades. The solution also lacks the ease of continuous upgrades that other WMS vendors offer, prioritizing customer control over the environment.

- Blue Yonder's supply chain software portfolio, migration toward a cloud-native WMS architecture, and acquisition strategies cause integration and technical complexities, challenging customers and the vendor and its vision of an end-to-end supply chain platform.

- In November 2024, some Blue Yonder customers started to feel the impacts of a cybersecurity attack. While this only impacted a small percentage of WMS customers who were on a legacy private cloud version WMS (not supported by the go-forward public cloud hyperscaler) and now appears largely contained, it was a significant disruption. Organizations on legacy versions should review disaster recovery and upgrade options with Blue Yonder or key partners.

Dematic

Dematic, part of KION Group, is a Niche Player in this Magic Quadrant, specializing in material handling equipment (MHE) and software solutions.

Over the past decade, Dematic has made several acquisitions, bringing various forms of warehouse software, most recently the acquisition of Digital Applications International (DAI), a U.K.-based provider of intralogistics and WMS software in 2020. Dematic has around 10,000 employees (over 1,100 focused on warehouse software). Gartner estimates its warehouse software revenue exceeds $150 million annually, with more than 540 warehouse software customers with a high proportion of these multisite, especially in EMEA.

Dematic serves customers in 27 countries, with 64% headquartered in North America, 30% in Europe, and the rest headquartered in Asia and other regions. It maintains direct implementation resources across Europe, North America, and APAC, with WMS customers in 23 industries, including retail, food service, and industrial and construction machinery.

Dematic offers a broad portfolio of warehouse capabilities. These include automated MHE and systems integration services plus an extensive suite of warehouse software solutions that include a warehouse control system (WCS), warehouse execution system (WES), WMS and asset and maintenance management. It also resells automation solutions like AutoStore and Quicktron and provides implementation services for SAP's EWM.

Dematic's go-forward product, Dematic WMS, is based on DAI's Matflo product. Dematic targets large businesses with both automated and manual warehouses. Most customers choose Dematic for highly automated Level 5 warehouse operations, though many customers have site deployments that are manual Level 3 operations.

Dematic is developing the next generation of its offering, leveraging Google Cloud to combine WMS, WCS and WES capabilities on a common technical platform based on its existing solution portfolio. Due to its historical focus on large-scale automation solutions, almost all of Dematic's implemented customers are on-premises deployments.

Strengths

- Dematic has a broad intralogistics software portfolio well-suited to complex automated warehouse operations that includes WMS, WCS and WES capabilities. It is focusing on AI capabilities and expanding simulation in warehousing through its partnership with Accenture and NVIDIA. It is also launching its second version of generative AI (GenAI) to support analytics in 2025.

- Dematic's midterm roadmap focuses on greater capabilities in computer vision, scenario modeling and planning, yard management and distributed order management to complement its existing strengths. It has also made progress in its enterprise data platform in a move toward a unified data model and a roadmap toward holistic optimization through 2025 and 2026.

- Because it is part of the larger Europe-headquartered KION Group, it can expand and collaborate, serving as a one-stop shop for MHE, racking, warehouse software and optimization capabilities.
- The vendor is stable, having existed in one form or another for more than 200 years. It is supported by a group with extensive experience in warehouse management, material handling and MHE automation.

Cautions

- Dematic is behind most WMS vendors in cloud maturity, with only 6% cloud adoption, and most clients are still on-premises with a perpetual license model.
- While Dematic is working on a next-generation platform with consolidated WMS, WCS and WES, its applications remain fragmented parts of a suite with an unclear roadmap for completion, with some of the existing software having a slow upgrade path.
- Dematic's background and heavy focus on automation may limit depth and breadth of focus on manual WMS business functionalities and emerging capabilities demonstrated by other vendors. Despite its presence on a large number of manual sites, its stand-alone WMS sales strategy is limited compared to others.
- Dematic WMS remains best suited for companies committed to using its material handling equipment. Non-Dematic MHE customers should conduct detailed assessments to determine suitability for stand-alone WMS implementations and integration with non-Dematic ecosystem hardware.

Ehrhardt Partner Group (EPG)

Ehrhardt Partner Group (EPG) is a Challenger in this Magic Quadrant, offering a broad portfolio of WMS/logistics solutions. It has over $130 million annually in WMS licenses and services revenue, comprising over 75% of its total revenue.

In addition to its WMS solution, EPG LFS, it has multiple SCE applications, a native WCS, consulting, and cloud services in multiple regions. EPG also offers LYDIA Voice independently from its WMS as part of its Supply Chain Execution suite (EPG ONE). In 2023, EPG acquired majority stakes in Groenewout and Greenplan, enhancing consulting and routing capabilities. It introduced a new CEO in 2024 with a manufacturing systems background. In March 2025, EPG acquired byways, a provider of timeslot and yard management, to complement its dock appointment scheduling (DAS) offering.

EPG's main offices are in Germany and the U.S., with 23 locations across EMEA, North America, Australia, Japan and Mexico. It expanded facilities in 2025 in the U.S., Japan and Austria. EPG has over 1,050 employees focused on logistics software and hardware. Of EPG's 1,700 supply chain execution customers, 930 are WMS, with 68% of these based in Europe, mainly in the Germany, Austria and Switzerland (DACH) region. About 12% of its WMS customers are in the Middle East and Asia, 10% in North America, 4% in Latin America, and 6% elsewhere. EPG's largest customer segments are 3PL, retail/e-commerce, industrial and construction machinery, automotive/parts, and consumer products (79% of its total customers). It offers specific functions for these segments and for food and beverage, pharma/healthcare, and textiles.

EPG has direct implementation resources globally, with partners in North America, Latin America and Asia, supporting 8% of implementations. Since launching its AI-focused department in 2023, the company has deployed a GenAI-driven chatbot to support its own code generation, testing and bug fixing, and has integrated some AI use cases in its product suite, such as its 3D-load-space calculator. It intends to release its new GenAI-inspired chatbot, EPG Virtual Assistant (EVA), by the end of 2025 to help customers configure screens, manage master data and more easily retrieve information.

Its WMS is most often used in Levels 4 and 5 warehouse operations, but it can scale from high Level 3. About 80% of customers have deployed or migrated to a dedicated cloud environment using EPG's private cloud services but can also deploy with a customer-preferred hyperscaler. Core applications, including WMS, are dedicated cloud, but others, such as International Shipping System (ISS) and Timesquare, its analytics offering, are multitenant cloud. New customers are on the cloud with subscription pricing, but EPG still supports existing customers who prefer to remain on-premises.

Strengths

- EPG is a stable, privately owned company with over 35 years of warehouse management experience, showing consistent, regional and international growth in revenue, customers, facilities, employees and partners.

- EPG has extensive experience in highly complex and automated (Level 5) warehouses, offering integrated WCS and 3D graphical simulation, emulation and visualization capabilities, and is enhancing what it calls its multiagent orchestration (MAO), formerly named Suburbia.

- EPG offers competitive pricing and TCO compared with other WMS vendors in this Magic Quadrant.

- Beyond its strong core WMS capabilities, EPG provides a portfolio of supporting technologies and extended WMS capabilities. These include LYDIA Voice, gamification, dock scheduling and yard management (enhanced by the byways acquisition), inspection tools, multicarrier management via the ISS, extended workforce management, 3PL contract and billing (C&B), and predictive maintenance for automated facilities.

Cautions

- EPG lags behind other vendors who have moved, or are moving, toward more modern microservices-based WMSs. It has transitioned to an object-oriented architecture with its latest version, but three-quarters of customers continue to use older versions.

- EPG's cloud strategy remains more agnostic than other WMS providers. With the latest version, its customers have the option of hosting on any hyperscaler of their choice. Additionally, EPG offers its own private cloud solution via EPX cloud services.

- While suitable for complex and highly automated environments, LFS is not built for lower-complexity operations and its usability is undifferentiated. EPG offers stand-alone solutions, such as cross-docking and light WMS, to complement basic ERP warehouse management functionality through its LYDIA Enterprise Solution (LES).

- Some extended WMS capabilities, such as workforce management and contracts and billing, may be too functionally rich for some companies as they were not built specifically for warehousing and lack live deployments in areas like engineered labor standards.

Generix Group

Generix Group is a Niche Player in this Magic Quadrant. It offers a portfolio of SCM solutions, including two WMSs, transportation and yard management, logistics order and replenishment management, and electronic data interchange (EDI).

In November 2023, Generix Group acquired DDS, a French software vendor that digitizes supply chain and transport flows and provides a TMS. The organizations' teams fully merged in April 2025. In May 2024, Generix acquired Keyneo, a French software vendor providing omnichannel and retail solutions, including order management and mobility offerings. Approximately 47% of Generix's $112 million in total company revenue in 2024 comes from WMS, and more than 270 of its 800 employees are focused on WMS.

Generix has two distinct WMS offerings: Generix WMS and SOLOCHAIN WMS. Generix WMS is deployed across more than 440 customers and over 2,000 warehouses. SOLOCHAIN is a contemporary WMS and manufacturing execution system (MES) solution with over 100 customers in Canada, the U.S. and Mexico, and some in South Korea and Australia.

Of Generix's 545 total WMS customers, 75% are based in Europe, 19% in North America and the remaining 6% in other regions. Its WMSs are deployed in 34 countries, with the largest market in France, followed by Spain and Portugal. Approximately 75% of Generix's WMS revenue is from consumer products manufacturers, retail, including e-commerce, and 3PL, with multichannel retail representing its largest customer segment. In addition to its existing locations around Europe and Canada, Generix has recently established new facilities in Portugal and Brazil.

Generix's WMSs are most often used in Levels 2 through 4 warehouse operations, but Generix WMS in particular scales to Level 4 and some Level 5 environments. Generix lacks a warehouse control system of its own for highly automated Level 5 warehouse operations but does offer standard connectors to some automation systems and engineering support for more complex mechanized integrations. More than 90% of its new contracts are SaaS, with 70% of Generix WMS customers now deployed on dedicated cloud and 30% of SOLOCHAIN customers, with Amazon Web Services (AWS) as the hyperscaler currently used for both WMSs. Generix WMS has two pricing models, based on users linked to the functional package of simple, medium or complex needs, or fixed monthly fees based on features/sites and transaction volume-based fees, not users. For SOLOCHAIN, pricing is primarily based on users and sites.

Strengths

- Generix has piloted multiple new capabilities, including resource planning and forecasting for either WMS. It is improving its 3D/2D maps through 2025 and is developing its roadmap toward predictive and prescriptive analytics. It also collaborates with clients on vision AI.

- Generix Group expanded its suite into TMS, omnichannel order management and in-store inventory management with its acquisitions of DDS and Keyneo. It is developing warehouse-focused tools to enable sustainability initiatives, aligned with the Keyneo second-life capabilities.

- SOLOCHAIN offers a seamlessly integrated WMS and MES that addresses the complexities of process integration between the warehouse and shop floor. In March 2025, Generix launched SOLOCHAIN Now to accelerate multisite deployments and improve the UI. It is also focusing on TMS integrations, enhanced MES planning, and yard and dock capabilities.

- Generix WMS does not restrict users in its subscription pricing model, providing an attractive TCO for some customers.

Cautions

- Generix lacks a strong global implementation partner ecosystem, with only 10% of its implementations involving a partner. Clients should vet implementation and support capabilities, especially for multisite deployment.

- Generix's WMS revenue and customer growth in 2024 overall were modest, with few new customers for its SOLOCHAIN solution. It lags behind vendors with functional conversational software and agents, with a roadmap over three years out.

- While SOLOCHAIN's architecture and back-office capabilities are differentiated, it lacks the depth and breadth of other WMSs' core and extended functionalities, including Generix WMS, forcing customers to balance architecture versus capability.

- Generix has two additional platforms for other capabilities and has been attempting to rationalize capabilities across its WMSs, while driving Generix WMS toward a SaaS model. These efforts will be further complicated due to focus on integrating the newly acquired solutions.

Infios (Körber)

Infios (Körber) is a Leader in this Magic Quadrant. Gartner estimates its 2024 revenue at over $500 million, with approximately 60% WMS-related. In October 2024, Körber's supply chain software business (now Infios) acquired MercuryGate, a TMS vendor, adding 300 employees, and about 500 TMS customers. Over the last year, Körber's supply chain software business has been undergoing a management restructure, and in March 2025, it rebranded as Infios, offering a portfolio of warehousing, transportation and order management solutions.

Infios serves 5,000 customers across all its products, with four independent WMSs, about 1,500 paying WMS customers and around 1,000 of its 2,100 employees focused on its WMSs. Others focus on related warehouse applications, robotics, DOM, freight audit and payment (FAP), and with its recent acquisitions, TMS. In 2024, it gained 53 net-new customers and implemented 263 operations.

Infios' four WMSs are: Warehouse Edge, which is best suited to Level 2 and low Level 3 warehouse operations; Warehouse Advantage, which primarily fits Levels 3 and 4, with some presence in Level 5 operations; Enterprise 3PL, which primarily fits Level 3 and low Level 4 warehouse operations; and WMS X, which primarily serves Level 5 operations but is also present in Levels 3 and 4. WMS X is deployed primarily in the DACH region, France and Spain, and is beginning to expand more in the Middle East and Asia. Fifty-six percent of the company's WMS customers are based in North America, 30% in Europe, 3% in Latin America, 1% in Asia and the remainder elsewhere.

Infios has a cloud-first model for new business, but adoption varies by WMS — from 5% for WMS X to 80% for Enterprise 3PL. Infios' WMSs are dedicated cloud-only with Oracle as the hyperscaler.

Strengths

- Infios' acquisition of MercuryGate, enVista's DOM/order management system (OMS), development of AI-based slotting, nascent GenAI use cases and warehouse worker gamification through its collaboration with vaibe from the broader Körber group enhance its breadth of capabilities.

- Infios has doubled the number of certified WMS implementation partner specialists in the last year to over 1,400 across 112 partner organizations and standardized more of its base Warehouse Advantage application to help its implementation capabilities match its growth.

- Infios has strong warehousing expertise and solutions beyond core WMS. Areas include voice, simulation and modeling, and material handling integration, along with its own WCS. Its leadership position relative to intralogistics smart robotics is also growing.

- Infios offers a blended, user-based pricing model (concurrent and named) to its clients. This can provide flexibility and a lower TCO for multisite/multishift operational models.

Cautions

- Infios continues to sell, develop and support four distinct WMS offerings. While its WMS technical platform enables it to upgrade some common functionalities across three of the four WMSs, other features are built on different logic and will not fit this approach. New acquisitions may divert resources to focus more on integrations.

- Despite expanding partnerships, reorganized service teams and evidence of improved project governance at Infios, some clients still note negative service and support issues with implementations, upgrades and large deployments. Due to high adaptability, customers must have strong internal technical resources and robust governance in place to manage, control and minimize customization.

- Infios' private equity investment has helped fuel its growth through acquisitions and investments to grow the organization. However, because private equity firms tend to hold assets for around three to five years, this makes a notable financial transaction likely in that time frame.

- With the ongoing acquisitions, most recently MercuryGate, into the Infios portfolio, it will look to expand its customer base by cross-selling the TMS and its WMSs to existing clients. While this fits Infios' refocus toward its core midmarket base and there are already more than 50 customers in common, clients should prepare for possible integration and user experience challenges.

Infor

Infor is a Leader in this Magic Quadrant. Owned by Koch Industries, Infor is a business application megavendor with more than $3.6 billion in global revenue. In addition to WMS, its portfolio includes a number of SCM applications embedded in or integrated with several of its ERP solutions.

Infor's SCM products range from planning applications to warehousing, labor management, 3PL billing and transportation. About 30% of its new WMS deals involve existing Infor ERP customers, and 70% are with net-new customers. We estimate the vendor has approximately 1,500 WMS customers across numerous WMS offerings, with about 300 now multitenant cloud. Ninety percent of new customers are cloud, with new on-premises customers primarily in China and Japan. Most overall WMS customers are on legacy systems.

Sixty-five percent of its customers are international (31% in Asia/Pacific, 19% in Europe and the Middle East and 15% in Latin America), with 35% coming from North America. Around 60% of implementations involve systems integrators and partners, including three global organizations and 21 local partners. Its strongest markets are 3PL, retail/grocery, wholesale distribution, automotive and industrial. Infor prefers a subscription-based WMS pricing model but supports perpetual licensing.

Infor's WMS is most often used in Level 3 operations, but it is making inroads toward more complex Level 4 and Level 5 environments. It also offers Factory Track, bundled with ERP systems, providing simplified Level 1 and low Level 2 warehouse capabilities. Infor prefers a multitenant cloud deployment, with AWS as the hyperscaler, but offers various deployment options, including on-premises.

Strengths

- Koch provides financial stability and a 10-year roadmap to further develop the Infor organization, its products and global partner network. This includes the Infor Marketplace, which offers partner-built products with prebuilt connectors, supporting growth and innovation.

- Infor has revamped its sales strategy by expanding dedicated WMS teams for stand-alone sales and suite expansions as well as supporting partners. Competing on price in a market scrutinizing TCO has led to above-average WMS customer growth, demonstrating resilience in a challenging market.

- Infor leverages capabilities like Birst for analytics, Infor AI, and ION for integration between Infor and external applications. Customers buying the multitenant version of Infor WMS will benefit from the Infor OS platform, which includes go-forward GenAI capabilities as well as document management, process mining and data insights. Additionally, Infor has been focusing on simplifying its ML model. The upcoming Infor Velocity Suite provides a catalog of all AI use cases that can be deployed to support its applications, including WMS.

- Infor's extensibility approach, including Mongoose, offers differentiated WMS customization, even for midsize enterprises, which remains problematic in other multitenant WMS cloud deployments. Enhanced scripting, launched in 2023, enables more advanced technical changes. With deployments in 65 countries and a strong international presence, Infor is frequently shortlisted by clients in Asia, supported by its robust partner network.

Cautions

- Despite some improvement, market awareness of Infor's WMS remains low. The WMS (about 1,500) and Factory Track (about 2,500) customer bases are small relative to Infor's overall ERP customers. Many remain unaware of its warehousing and data collection capabilities, leading them to seek alternatives.

- While pricing has become competitive, some clients find it complex due to atypical metrics (e.g., number of APIs and different transaction metrics).

- Infor emphasizes industry focus and differentiation, including healthcare, at the corporate level, but notable verticalization of the WMS product is limited.

- Many WMS customers still use legacy products and can't easily upgrade to leverage newer features. Infor has tried to alleviate this problem with its "migration factories," which are currently focusing industry by industry, not as an overall program. But moving to its newer WMS will require reimplementation, not an upgrade.

Made4net

Made4net is a Niche Player in this Magic Quadrant. It is a WMS and SCE-related solutions vendor. Gartner estimates its annual WMS revenue at $35 million. In 2022, Made4net acquired U.S.-based WMS vendor Zethcon and its midmarket 3PL and cold-chain-focused Synapse WMS. In May 2023, Ingka Investments, the investment arm of Ingka Group, the largest owner and operator of IKEA stores in 31 countries, acquired Made4net to improve its order fulfillment landscape, deploying Made4net in its first store in June 2024. Made4net continues to operate as an independent subsidiary.

Made4net's SCExpert Suite includes WMS, transportation, delivery management, yard and labor management, all running on a single common technical platform.

Made4net has about 230 employees focused on warehouse management and 940 customers globally (120 of whom are Synapse WMS customers) with 50 net-new customers in 2024. All Synapse WMS customers are in North America, but Made4net's WarehouseExpert customers are well-spread: 34% in North America, 29% in Europe, 13% in Asia, 11% in Latin America and 13% in other regions. Made4net has partners and customers in about 40 countries, with offices in the U.S., the U.K., Czech Republic and China. Its three key industries are 3PL, retail (its fastest-growing industry with a special focus on grocery) and wholesale distribution, with a significant number of customers in consumer products, e-commerce, food service and apparel.

Made4net's WMS is most often used in Level 2 and Level 3 environments (currently 72%), but it has customers extending into Level 4 environments (20%) and some in Level 5 and Level 1 environments. Made4net supports all deployment methods, but 42% of its installed base remains on-premises, and most of its cloud deployments are dedicated cloud, deployed on AWS for most customers, but with AliCloud for customers based in China.

Strengths

- Made4net has a compelling international, go-to-market strategy and independent sales track record with consistent growth, not impacted by supporting implementations into Ingka Group-owned stores. More than 57% of its business is outside of its home geography, and it has recently expanded further into Asia/Pacific (APAC). It has customers in almost 40 countries across 20 industries, delivers its applications in 23 different languages and supports personalization translation features.

- Made4net has some SCE convergence, with six product categories (WMS, yard management, labor management and three transportation solutions) on a common platform sharing a common data model that can support enhanced execution operations. It released a new radio frequency (RF) framework in April, offering greater configurability, adaptability and messaging, and will release a complete new UI for the entire application in September 2025.

- Made4net has a cost-effective and rapid implementation methodology that is well-suited, but not limited to, the needs of small and midsize businesses (SMBs). It claims it can do an implementation in as little as six weeks. It also offers flexible deployment options: SaaS-dedicated cloud deployments, on-premises with a perpetual license, or on-premises with a subscription pricing model.

- For its size and target customer base, Made4net offers a respectable automation strategy supporting black box and white box integrations with WCSs. It also has mature food-handling capabilities. While it has a more cautious approach to AI than some vendors, it is deploying some AI-enabled capabilities and expects to release its recommendation engine and updated carrier integration module in late 2025.

Cautions

- While headcount is growing, Made4net has a small number of WMS-focused employees serving a large and growing number of customers, including its parent, compared with other vendors. It is spread across two WMSs, which could stretch resources.

- Made4net can support larger, more complex and automated facilities. However, its experience is greatest in the midmarket sector, and it has limited resources compared with larger WMS providers. Larger customers with more complex warehouse operations must be diligent in evaluating Made4net's implementation tools, capabilities and resources.
- Customers with multisite rollouts spanning geographical territories must be prepared to potentially manage multiple sales or implementation partners despite Made4net's strong global partner ecosystem.
- While Made4net continues to operate as an independent subsidiary post-Ingka Group acquisition, future customers should vet its product strategy and roadmap.

Manhattan Associates

Manhattan Associates is a Leader in this Magic Quadrant. It is the second-largest specialized supply chain suite provider in this evaluation, with 2024 company revenue of over $1 billion and approximately 4,600 employees globally.

Gartner estimates Manhattan Associates has more than 1,700 customers in around 50 countries, with a combination of company-operated sales and support offices and partners. It offers a broad portfolio of SCM solutions covering logistics, omnichannel commerce, supply chain planning and supplier enablement. Its core applications comprise WMS, TMS, DOM, supply chain planning (SCP) and point of sale (POS), all delivered on a common microservices multitenant cloud architecture that supports extensibility and continuous upgrades.

Manhattan's strongest industries are retail, omnichannel/e-commerce, footwear/apparel, 3PL and wholesale distribution, with customers across multiple industries. It offers three distinct WMSs: Manhattan SCALE, Manhattan Warehouse Management for IBM i (WMi) and Manhattan Active Warehouse Management (WM), its cloud-native microservices multitenant cloud WMS that replaced Manhattan Warehouse Management for Open Systems (WMOS). Gartner estimates more than 20% year-over-year (YoY) growth in net-new Manhattan Active Warehouse Management customers and go-lives in 2024. A significant number of customers have deployed or are deploying unified Manhattan Active WM and Manhattan Active Transportation Management (TM). In October 2024, Manhattan released its Manhattan Active Supply Chain Planning solution on the same technology platform.

Manhattan's WMSs target different markets. Manhattan SCALE, based on a Microsoft platform, caters to the small and midsize business (SMB) and 3PL WMS markets with Level 2 and Level 3 warehouse environments. Manhattan WMi continues to support customers preferring the IBM i platform and is most often used in Level 3 and Level 4 operations. Manhattan Active WM caters to sophisticated, complex and often highly automated warehouse environments, and is most often used in Level 4 and Level 5 warehouse operations. However it can scale from Levels 2 through 5, offering a unified WMS and WES. It is deployed as a multitenant cloud application, and while the vendor states it is cloud-provider-agnostic, it utilizes Google Cloud Platform (GCP) for most customers but uses AliCloud for those in China.

Strengths

- Manhattan continues to build its offerings and grow its business organically, aiding consistency, with its last acquisition in 2014, contrasting with most competitors that have grown through acquisition.

- Manhattan was the first and so far the only major WMS vendor to rewrite its WMS onto a microservices, multitenant cloud, systems architecture that supports elements of composability, extensibility and zero upgrades. It offers a unified platform with WMS, DOM, omnichannel, TMS and now SCP on a common codebase and multitenant cloud systems architecture.

- Manhattan remains highly effective at customer-focused operational R&D that translates business requirements into deliverable products of good quality and reliability. It is one of the leaders from a user experience (UX) perspective, having established UX designers that upgraded the flexibility and aesthetics of its UX.

- With the late 2024 release of its supply chain planning application as part of its unified platform, it has moved closer to supply chain convergence. This may evolve into greater opportunities to optimize inventory, labor and transportation in a unified plan for organizations subscribing across the solutions.

Cautions

- Manhattan has a reputation for being expensive, and its applications can be complex, requiring more effort to support than other systems. While Manhattan Active WM is versionless, mitigating upgrade costs, the overall TCO is often high.

- Manhattan continues to get over half of its revenue from implementation, customization and other services which, while it has been growing its implementation partner network, still makes it less systems integration (SI)-partner-friendly than other WMS leaders.
- While focus on client-centric extensibility with its Manhattan ProActive solution may reduce some clients' dependency on the vendor's services, the solution remains complex and training in the tool is expensive.
- While Manhattan has WES capabilities, it continues to take an agnostic service-centric approach to robotics and material handling integration, and has not adopted a complete multiagent orchestration (MAO) platform or a WCS.

Mantis

Mantis is a Niche Player in this Magic Quadrant. It is a WMS suite provider headquartered in Greece with offices across EMEA and North America. In 2022, it was acquired by Germany-based logistics software and hardware provider ecovium. Operating since 1996, Mantis has 184 employees focused on WMS, including 47 from ecovium.

Mantis did not meet this year's tighter inclusion criteria for revenue, but it exceeded the compound annual growth rate (CAGR) criterion for customer and revenue (23% and 27%, respectively) with sustained and rapid growth. In February 2025, Mantis endured and rapidly resolved a cybersecurity attack. This only impacted limited back-office functions in one region for a short time period, and neither client-facing applications nor customer data were impacted. This research focuses primarily on Mantis and its WMS while also considering the ecovium ecosystem impact on the vendor's longer-term prospects.

Most of Mantis' 900 WMS customers are in EMEA, with a strong presence in Central and Eastern Europe, Türkiye, Israel and the Middle East. It has grown by over 100 net-new customers in the last year. It also has a limited but growing presence in North America and is gradually growing in the DACH region, where most of the 280 legacy ecovium WMS customers (spread across three WMS solutions) are located. It is deployed across 30 countries, with office locations in 10 countries and more than 20 sales and implementation partners. Its top three customer industries are 3PL, distribution and wholesale, and multichannel retail and e-commerce, with customers spread across 14 vertical industries.

Clients range from SMBs with single-site deployments having a few users to large multinationals with multisite, multicountry deployments with hundreds of concurrent users. Its WMS, Logistics Vision Suite (LVS), is most commonly used in Level 3 and Level 4 warehouse environments but scales from Level 2 to some Level 5 operations. Mantis' customer base is primarily on-premises, but it has a small number of customers (3%) in dedicated public cloud environments on Microsoft Azure, its preferred hyperscaler for all regions. It offers both perpetual license and subscription pricing.

Strengths

- Mantis has a strong local presence, partner network and growing customer base in EMEA, especially in territories where many other WMS vendors are not present. It is slowly gaining new and replacement ecovium WMS customers in the DACH region, mitigating geopolitical disruptions in some of Mantis' other markets.

- Mantis offers an adaptable solution with a visual workflow and powerful rule engine as well as a seasonal subscription offering that should support many customers' needs. It also offers automation (hardware) as a service well-suited to its midmarket and 3PL customer base. More advanced customization is offered through scripting tools and APIs, with a roadmap to improve support for advanced analytics and smartglasses.

- In 2024, Mantis focused on developing its platform further and on new capabilities for its Visual Mobile/RF Designer. It also integrated LVS with ecovium's Simple Chain Platform to enable greater cross-functional SCE convergence with ecovium's large customer base.

- Mantis offers EU Falsified Medicines Directive (FMD) and Tobacco Products Directive (TPD) compliance capabilities for traceability in the tobacco, healthcare and pharmaceutical industries. Additionally, it offers advanced traceability use cases for fast-moving consumer goods (FMCG) and consumer electronics. It also has a differentiated inventory slotting vision and offering with Slot Master, with which it can offer "slotting as a service."

Cautions

- Mantis' cloud maturity trails the market, with only 3% of customers recently hosted in a dedicated cloud environment. Customers should review the maturity of the commercial SaaS offering.

- Mantis is well-suited to the midmarket and EMEA, with several functional enhancements for these markets, but its North American presence remains small.

- While Mantis enhanced support for integration with sorters, parcel carriers and pick-to-cart capabilities to interact with pick to light, customers with highly automated warehouse environments should carefully map their requirements to see if LVS provides the necessary support for all scenarios. They should consider alternatives and WCS vendor capabilities alongside those of Mantis' native tools.

- Given Mantis' small number of company employees, customers considering large, complex global deployments should stringently review the level of available direct and partner implementation resources and support.

Microsoft

Microsoft is a Challenger in the Magic Quadrant. It is a roughly $260 billion global application and infrastructure megavendor, and Gartner estimates more than $1.1 billion in annual revenue comes from its supply chain applications.

It offers Microsoft Dynamics 365 Finance and Supply Chain Management, which includes its WMS capabilities along with other SCM capabilities like planning, procurement and order management, as an integrated cloud ERP solution. Dynamics 365 Supply Chain Management, not Business Central, is assessed in this research.

We estimate Microsoft Dynamics 365 to have more than 1,300 warehouse management customers and a much larger number of warehouse sites where its WMS solution is deployed. Microsoft serves customers in more than 19 industries, with the largest number of customers in retail, consumer packaged goods (CPG) and distribution, and a significant and growing number in manufacturing. It has a strong global presence and serves clients across different geographies, with the largest numbers in Europe and North America, with fewer in Asia, Latin America and other regions.

It is a dedicated cloud WMS, deployed on and benefiting from Microsoft's Azure infrastructure, and typically sold on a subscription basis as part of the larger Microsoft supply chain platform offering, Dynamics 365 Supply Chain Management. In June 2024, Microsoft made generally available a release of its warehouse only mode in Dynamics 365 Supply Chain Management, subsequently providing the ability to integrate with third-party ERPs and OMSs. Historically, it has been most often used in Level 2 and Level 3 operations, but the vendor has claimed the majority of its customers use its WMS to support Level 3 complexity warehouse operations.

Over the last few years, Microsoft has been incrementally developing more advanced WMS capabilities through a couple of cycles of acquisitions and organic development. The vendor has a large number of global sales and implementation partners that sell and implement Dynamics 365, with only a small number of implementations conducted by Microsoft directly. The majority of its customers are midsize enterprises, but it is deployed at some larger enterprises.

Microsoft declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- Microsoft Dynamics 365 Supply Chain Management (WMS) is a suitable shortlist candidate for many Microsoft Dynamics 365 customers because it offers sufficient functionality, ease of use and integration with other capabilities in Dynamics 365 ERP.
- Microsoft offers the ability to easily scale users for organizations already in the Microsoft Dynamics 365 ecosystem. This can make pricing, mostly based on user roles or devices, competitive compared to other vendors.
- Microsoft's broader technology ecosystem means customers can benefit from capabilities such as Microsoft Fabric, Microsoft Power Platform, Power BI, its Microsoft Azure Cloud Platform, AI with Microsoft Copilot Studio and its software partner network.
- Among WMS vendors in this Magic Quadrant, Microsoft is one of the early adopters of GenAI-enabled capabilities through its Copilot stack and has also introduced process mining capabilities for WMS.

Cautions

- The vast majority of Microsoft's WMS customers use it as part of the Dynamics 365 Supply Chain Management suite. The warehouse only mode was only recently released, so users should vet the maturity of its stand-alone and third-party integration capabilities.
- Microsoft's WMS is not suitable for the most complex and multisite 3PL environments because it lacks extended functionalities, such as multidivision inventory per site and 3PL billing. However, some complementary capabilities are offered by partners.
- Customers should scrutinize partners' warehousing and fulfillment experience and capabilities due to Microsoft's very large number and diverse range of sales and implementation partners.
- Microsoft lacks advanced core (complex allocation and picking) and extended capabilities, such as labor and yard optimization, when compared to leading WMS providers.

Oracle

Oracle is a Leader in this Magic Quadrant. It is a global application and infrastructure megavendor with approximately $55.2 billion in total revenue, including $43.5 billion from software in 2024. Gartner estimates that Oracle has the second-largest market share in the SCE software market, including WMS software, with $778 million in SCE revenue and more than $300 million attributed to WMS.

Oracle offers multiple WMS products, but this research focuses exclusively on Oracle Fusion Cloud Warehouse Management (i.e., Oracle Warehouse Management), which is Oracle's primary go-forward WMS. From its inception, this solution has been a pure multitenant SaaS/cloud WMS and is deployed on Oracle Cloud Infrastructure (OCI) Gen2. It is integrated with Oracle's other cloud SCM offerings: Oracle Fusion Cloud Supply Chain Management & Manufacturing, Oracle NetSuite and Oracle Retail Merchandising Operations Management Cloud.

Oracle's portfolio includes Oracle Fusion Cloud Inventory Management for basic materials management and Level 1 warehouse functionality alongside other cloud solutions for order management, manufacturing, transportation and sales. Oracle Warehouse Management integrates with these solutions but remains separate to allow integration with non-Oracle applications, which accounted for 24% of new bookings last year. Oracle has over 20 partners responsible for 80% of Oracle Warehouse Management implementations, ranging from small boutiques to large global consultancies. Customers are well-distributed internationally, with 42% in North America, 35% in Latin America, 19% in EMEA and 5% in Asia/Pacific. We estimate that Oracle has 626 Oracle warehouse management customers with customers headquartered in 39 countries and deployed in over 1,600 warehouses in 75 countries.

Oracle claims its warehouse management customers are spread well across Levels 2 through 5 warehouse operations, with the largest concentration in Level 3, and approximately 20% of customers having a facility with some automated MHE.

Strengths

- Oracle has a coherent SCM cloud strategy and the most mature cloud WMS offering of vendors in this research. It achieves notable accomplishments with cloud, such as claiming zero downtime, and has enhanced tools like its WMS Support health analyzer with GenAI-based queries. It currently leverages and has a roadmap to exploit other

Oracle technologies, such as AI, machine learning (ML), agentic AI, and Internet of Things (IoT), to support WMS needs. Those needs include predictive and fulfillment dashboard, labor standards estimates and gamification for teams and individuals.

- Oracle has rolled out its next-generation user experience, called Redwood, for mobile use throughout its WMS, with ongoing work on the desktop experience. The WMS benefits from Oracle's own vision technology transposing images into data.
- Oracle's WMS technical architecture is differentiated, supporting a platform-as-a-service (PaaS) layer and listing 500 WMS-focused APIs, enabling customers to build converged applications. It is also enhancing cross-application integration to expand its industry reach into verticals such as industrial manufacturing.
- Oracle expanded support for Level 1 warehouse environments with its newly released Mobile Inventory, using the Redwood design. This enables light warehouse functionality for Inventory Management Cloud without the need for deploying its full WMS or relying on partners' mobile data collection solutions.

Cautions

- While Oracle has a higher proportion of stand-alone WMS customers than some other megavendors (non-Oracle accounts for 24%), there is greater strategic focus on Oracle Fusion Cloud suite sales, especially internationally. There is less emphasis on WMS support for JD Edwards or NetSuite applications, with other vendors having strategies to support those.
- While Oracle WMS Cloud continues to grow, it remains a small percentage of the overall Oracle ecosystem.
- While Oracle's WMS can be, and is, integrated with non-Oracle applications (ERP systems), Oracle relies on SI partners to build these integrations. They can then be certified on the Oracle Cloud Marketplace.
- Eighty percent of implementations are performed by SI partners. While most have strong technical competencies, customers should vet their depth and breadth of warehouse expertise, such as design, layout, process best practices and automation integration.

Reply

Reply is a Visionary in this Magic Quadrant. It offers an array of IT services, with a primary focus on consulting, SI, digital services and cybersecurity. Reply has total annual company revenue of more than $2 billion and approximately 15,000 total employees across the group.

It offers warehouse management applications and services, with about $44 million total WMS revenue. About 370 employees support its two WMSs: LEA Reply, a multitenant cloud WMS developed in a contemporary microservices architecture, and Click Reply, its on-premises WMS.

Reply gained about 30 net-new WMS customers in 2024, with approximately 350 WMS customers overall. LEA surpassed Click customers for the first time in 2023 and has a significantly faster growth rate. Reply's WMSs are deployed in 35 countries, with 73% of WMS customers in Europe, 11% in North America, 11% in Latin America, 3% in Asia and 2% in other regions. It is expanding its international presence with new leadership, resources and locations in France, the U.K. and the U.S. Its WMS customers span multiple industries: LEA Reply is strong in retail, e-commerce, food and beverage, fashion and luxury, and 3PL; Click Reply is strong in automotive, industrial, service, and high tech.

LEA Reply generally caters to a range of warehouse-centric network environments and is most often used in Level 2 and Level 3 warehouse operations. However, it can scale up to low Level 4 operations and has a growing presence in Level 5 warehouses (13%). LEA Reply is the vendor's multitenant cloud offering built on its contemporary microservices architecture and is deployed on AWS globally, including in China, and can also be deployed via other cloud providers upon request. Click Reply is best suited to multisite, complex Level 3 and Level 4 warehouse operations, often using material handling automation, and can scale to Level 5 operations (26%). Reply can host its on-premises Click Reply WMS as a dedicated cloud solution.

Strengths

- Reply remains a technological innovator that prototypes, commercializes and delivers new capabilities at a greater rate than most other WMS providers. These include a variety of AI techniques to support analytics and implementation; it is piloting ML-based workforce forecasting, and it has deployed smart loading and computer-vision-aided picking.

- To enable these and other capabilities, it has put out GaliLEA, its multiagent AI offering as part of its second-generation release of the LEA Reply digital platform. GaliLEA also improves response time, data retrieval and decision making for warehouse operatives and managers. Reply's roadmap includes greater deployment of its Warehouse Orchestrator to better deploy GenAI, planning and optimization, edge automation, and a variety of field technologies.

- Reply leverages an expansive set of strategic technology partnerships, some for its internal product development and some as a direct deliverable to its customers.
- Unlike most vendors, Reply has demonstrated both technical and commercial composability by assembling only the required microservices across its applications into new packages for e-commerce, in-store and manufacturing customers.

Cautions

- Reply remains primarily focused on Europe (mostly in Italy and the U.K.) for WMS, with 73% of its customers and more than 65% of its employees in Europe. However, it is beginning to expand in other regions, specifically targeting the DACH region and the U.S.
- Packaged WMS software is not Reply's core business, representing less than 3% of its revenue; its primary business is consulting and SI services. With local offices in key geographies, customers can expect to receive all services from Reply.
- Reply offers two distinct WMSs, with notable overlaps in functionality. They also have significant differences in technical architecture, adaptability, cloud deployment approach and maturity. LEA Reply is the more recent and go-forward WMS. In some areas, it is still working to match some industry-specific functionalities of Click Reply such as in automotive.
- While LEA Reply customers can benefit from Reply's overall resources and expertise, the Reply group is a collection of over 150 branded offerings. Implementation resources and support will still need to be vetted and would mostly come from within the WMS group, not the broader consulting organization.

SAP

SAP is a Leader in this Magic Quadrant. It is a global software megavendor with more than $34 billion in total annual revenue (almost $30 billion in software revenue). Gartner estimates SAP's SCM software revenue at $8.2 billion, with approximately $550 million attributed to WMS software.

This research focuses exclusively on the SAP Extended Warehouse Management (SAP EWM) solution. SAP does, however, still support SAP Warehouse Management (LE-WM) — its legacy WMS — which is seamlessly integrated and shares logic with SAP ERP Central Component (ECC).

SAP EWM remains strongest in Europe, with 50% of customers in EMEA, 21% in North America, 12% in Asia and 17% in Latin America. SAP has more than 2,500 EWM customers (more than half deployed on S/4HANA EWM), with customers in 24 industries supported by the core product. It has strengths in consumer goods, its strongest industry; retail, including e-commerce, grocery and food service; automotive; mill products; mining; wholesale distribution; and industrial/construction machinery.

SAP EWM is most often used in Level 2 and Level 3 warehouse operations but can scale to Level 5. It is generally too complex and not appropriate for stand-alone Level 1 operations. Most EWM customers are on-premises (over 80%), with almost 15% on dedicated cloud (hosted) and only 5% on its newer multitenant, public cloud offering. More than half of SAP's dedicated cloud customers deploy on a stand-alone rather than embedded EWM instance. Most of its dedicated cloud deployments are customers moving to S/4HANA Cloud as well as for new sites. The vast majority of its multitenant cloud customers are net-new EWM customers. EWM is cloud-deployed across four hyperscalers (Azure, AliCloud, AWS, Google) and SAP cloud services.

Strengths

- SAP has the largest WMS customer base, with more than 7,000 customers between its legacy LE-WM and EWM. SAP also has a substantial global presence as well as global go-to-market and deployment capabilities, with EWM customers in 75 countries. SAP plans newer releases that may facilitate significant growth across its larger ecosystem.

- EWM, by offering sufficient functionality, is a suitable shortlist candidate for many SAP (SAP ECC or SAP S/4HANA) customers. EWM Advanced users can deploy SAP Material Flow System (SAP MFS) for MHE integration, more usually with decentralized EWM. EWM customers may benefit from innovations in AI later in 2025, such as use of Joule, SAP's GenAI assistant, waveless picking and warehouse task execution forecast.

- SAP has a compelling platform strategy for addressing SCE convergence. EWM offers integration with ECC and S/4HANA and components like transportation management, global trade compliance, quality, plant maintenance, field logistics, environmental, health and safety, and manufacturing integration capabilities with SAP Digital Manufacturing.

Harmonized data and business objects have improved connections between warehousing and transportation with Advanced Shipping and Receiving (ASR).

- SAP's extensive global ecosystem includes implementation, consulting and technology partners, featuring global SIs, MHE vendors and specialist EWM consulting organizations. Technology partners also offer extensions to customers through SAP Store.

Cautions

- SAP EWM remains best suited for companies already using SAP ERP (ECC or S/4HANA). Non-SAP ERP customers should do detailed assessments to gauge suitability for stand-alone WMS implementations and non-SAP integrations.

- Mainstream support for SAP LE-WM will end for all customers by 2030. This will compel existing SAP WM customers (we estimate 4,500) to migrate — not upgrade — to something new, such as EWM, or use Stock Room Management for S/4HANA, a less functionally rich version of SAP's current LE-WM product. Organizations migrating to S/4HANA that are not signed up for the RISE program should validate options for extended support beyond 2025.

- SAP's EWM cloud vision and strategy is complex compared to competitors. Organizations should carefully consider their long-term warehousing strategy to avoid the risk of reimplementations and data migrations between the different WMS products.

- EWM's pricing tends to be higher than that of comparable WMSs. Its pricing structure, based on goods receipt, goods issued and production staging transactions, can be high for companies with high transaction volumes. Also, implementations are mostly performed by third parties and costs and schedule overruns can be high.

Softeon

Softeon is a Visionary in this Magic Quadrant. Softeon is a small, SCE solution vendor in business for over 25 years with total annual WMS revenue of $56 million. In 2022, Warburg Pincus acquired the majority share of Softeon, and in March 2023, Softeon finalized its acquisition of GetUsROI and its AttunedLabs software development arm. The latest acquisition added new capabilities through its LUCA platform, which provides low-code and prebuilt integrations with a variety of material handling systems and automation vendors.

Softeon is based in North America, which accounts for the majority of its customers and revenue (84%), plus about 7% in Europe, 5% in Latin America, and 4% in Asia and other regions. Although Softeon's roots are in warehousing, it has a noteworthy SCE convergence vision and portfolio that includes DOM, some transportation, direct store delivery and planning on a common technical platform.

Softeon's customer base (202) and growth (20 added over the last year) are modest compared with most vendors in this research. Some of these customers have very large and complex multisite WMS implementations (Levels 4 and 5), while others, including some of the cloud users, are quite small and less complex (Level 2) operations. The vendor is particularly strong in 3PL (over a third of its customers) and is growing in other industries, such as e-commerce (about 17%), retail (about 9%), apparel (about 10%) and consumer goods (about 7%). More recently, it has added capabilities and focus on healthcare logistics and has about 8% of its customers in pharmaceuticals and healthcare services.

Softeon is most often used in Level 3 but has a high proportion of customers in Level 4 and Level 2 warehouse operations and can scale to highly automated Level 5 operations. Customers have deployed it to a large number of Level 1 sites. The vendor combines WMS and WES on a common platform, supporting nonautomated and more automated operations. It offers the same software as either dedicated (single-instance) cloud or multitenant cloud. About 95% of its business is dedicated cloud with AWS as the preferred hyperscaler. All new clients deploy on the cloud with a subscription model.

Strengths

- Softeon is one of the few WMS providers offering fixed-price implementations that are generally lower in cost than other vendors. These are supported with strong implementation tools, such as drag-and-drop editors and wizards used by the vendor and its partners, and its structured solution delivery methodology.

- Softeon is beginning to demonstrate the benefits of combining the strengths of its newly acquired LUCA solution to ease integration with its existing (embedded and independently offered) WES capabilities. It also offers native integration to and optimization of technologies such as voice, put walls and robotic pick to cart.

- Softeon is increasing its focus on enhancing adaptability and agility and has improved product UI configurability, ease of use and navigation with the Pulse app, and plans adoption of predictive analytics and ChatGPT-enabled integrations in its LUCA platform.

- Softeon has enhanced its tools integrating SLICE, its new externalization framework with its Elastic Communicator, creating a script-based integration framework to simplify data exchange and actions for a variety of equipment and automation.

Cautions

- Softeon remains largely an Americas-centric organization in practice and in strategic direction, with the vast majority of its revenue and customers in North America and some rollouts for its large global customers.
- Clients have historically praised Softeon's customer-centricity. Changes in ownership and loss of some key people mean this characteristic should be watched despite employee retention now being over 95%.
- The dynamics of Softeon's longer-term viability as an independent company changed with Warburg Pincus taking majority ownership. Private equity firms tend to hold assets for around three to five years, which makes a financial transaction likely in that time frame.
- While the vendor has customers across industries, much of its strategic focus appears to be on key 3PL customers and capabilities.

Synergy Logistics

Synergy Logistics is a Niche Player in this Magic Quadrant. It is a small software company focused exclusively on WMS and directly related products, such as mobile robots, with WMS license/subscription revenue of approximately $40 million and overall WMS revenue of $70 million. The vendor was formed in 1972 and is based in the U.K., with additional offices in the U.S. and Spain.

Synergy has over 260 WMS customers. Revenue and customers are nearly equally divided, with 54% of its customers based in Europe, 43% in North America, and a small but growing number in other regions. It has more than 100 employees exclusively focused on WMSs, with most in the U.K. and North America. It also has a presence in the Netherlands and is expanding into Singapore. Its clients range from SMBs to global organizations, but its strength and differentiation are strongest in the SMB market, with almost 80% of its customers categorized as SMBs. Synergy's top three industries — representing 63% of its business — are e-commerce (34%), 3PL (22%) and wholesale distribution (11%), but it is growing in other industries.

Synergy's WMS, SnapFulfil, is most often used in Level 2 and Level 3 warehouse operations. However, it can scale down to high Level 1 and up to moderately complex Level 4 operations that don't need broad, extended WMS capabilities. Synergy is one of the longer-tenured cloud WMSs, offering a rapid deployment, SaaS and dedicated cloud solution through its cloud infrastructure partner 11:11.

Strengths

- SnapFulfil WMS is built around a robust and flexible rule engine that allows high levels of noncode adaptability to support customer-specific and vertical-industry-specific requirements. This enables the vendor's rapid implementation methodology and minimizes shopfloor training needs.

- For companies considering robotics, Synergy offers SnapControl, which provides integration, work prioritization and allocation capabilities to better orchestrate tasks among humans, devices and robots. It can also be deployed independently of its WMS. Synergy has further expanded its integrations, technology partners and carrier ecosystem.

- Synergy is mature in dedicated cloud deployments and offers favorable service and disaster recovery SLAs when compared to many other vendors. It also offers a differentiated and scalable seasonal pricing strategy. This allows companies to flex their number of concurrent users and associated costs based on seasonal demand variations. For some customers, it offers a no-capital-expenditure, turnkey-managed service deployment model. Its focus on data and analytics enabled by its SnapData tool, which differentiates it from others in the midmarket.

- Synergy has a video training and remote implementation solution called SnapBuddy. It overlays instructional, interactive guidance to end users of the application. It also offers configuration instruction and real-time training and feedback to superusers and administrators.

Cautions

- While Synergy is expanding its ecosystem of technology partners, it lacks a strong network of implementation partners and has suffered significantly slowed WMS customer growth in 2024. Most customers are dependent on the vendor for consulting services, and these resources could be taxed given its small number of employees.

- Most of its customers are in the U.K. and North America, where the majority of its resources are domiciled, with modest growth in other countries. Deployments outside these geographies must either be performed by the company or require remote implementation services from the vendor.

- The vendor is in the process of migrating its WMS into a more modern architecture to further enhance usability, adaptability and functionality. Existing customers should request a roadmap to understand migration impacts on their operations.

- Synergy is strongest in the SMB sector, with nearly 80% of its customers in this space. While it is looking to move upmarket, its deployment strategy could be a constraint. Although its self-implementation tools and rapid deployment strategy can mitigate risks in simple WMS environments, this can stretch resources as large, more complex projects require dedicated resources for multisite deployments.

Tecsys

Tecsys is a Challenger in this Magic Quadrant. It is a vendor of warehouse management and companion SCE capabilities, with approximately $122 million in WMS software and services revenue. The company has 40-plus years of experience in warehousing and services, with more than 350 of its over 700 employees focused on WMS. It has a relatively broad suite of SCM capabilities, including core and extended WMS, demand forecasting, procurement, DOM, point of use (POU) and pharmacy inventory management (PIMS).

Tecsys serves 246 WMS clients, 85% of whom are in North America, with 17% in Canada and 68% in the U.S. Its international presence is limited, with 15% of customers in Europe. The vendor has a strong market position in healthcare and life sciences, with 33% of its customers and about 66% of its pipeline in these industries. It is expanding in hospital pharmacy and pharmaceutical distribution, with 22% of its pipeline in the pharmacy vertical. Other key industries include 3PL, industrial and wholesale distribution, each contributing between 13% and 16% to its industry coverage. Tecsys serves both SMB and large customers, with 50% categorized as large to very large organizations.

Tecsys is mostly used in Level 3 and low Level 4 warehouse operations, but it can handle Level 2 warehouse operations with some specialized Level 1 capabilities, notably in healthcare environments. Tecsys has also been experimenting with AI-driven optimization algorithms and intelligent decision-making support in its WMS. Most implementations are offered in a six- to eight-month time frame and are direct, but about one-third are now supported by its growing partner network. Historically, most of Tecsys' deployments have been on-premises, but cloud/SaaS is now preferred for new deals, with cloud penetration over 90%. All cloud deployments are dedicated, single-instance cloud with AWS as the preferred hyperscaler.

Strengths

- Tecsys has strong vertical industry differentiation, especially in healthcare, offering specialized capabilities, compliance, such as for new Drug Supply Chain Security Act (DSCSA) guidelines, domain expertise, U.S. 340B support and healthcare-focused partnerships, such as with Workday, Oracle and TraceLink. Its established support for consolidated service centers for hospital networks is now expanding further into supporting consolidated pharmacy service centers.

- Tecsys' 2024 release included drug shortage data management to help prioritize tasks and identify alternatives when required. It also incorporated Item Master Cleansing, an AI tool to streamline clinical workflows, and support for real-time update shelf labels to aid replenishment, expiry and recall management.

- Tecsys offers robust extensibility with its Itopia platform, aimed at providing low-code development and API-based integration to support unique custom requirements. It is one of the few vendors in this Magic Quadrant offering embedded low-code application platform (LCAP) capabilities, such as database integrity, security and upgrade-safe extensions.

- Tecsys is focused on improving its automation integration strategy by partnering with specialized low-code integration technologies and MHE providers, while still supporting with its own Itopia platform. Partners include SVT Robotics, Locus Robotics, Matthews Automation and Terso Solutions for healthcare specifics.

Cautions

- Most of Tecsys' professional services resources (80%) are based in North America, and some clients report constraints on implementation resources. Tecsys is recruiting and has developed a formal alliances program, adding specialist partners to mitigate this, but adoption from some is slow.

- Although Tecsys' solution provides notable flexibility and adaptability with features like its powerful rule engine, this can add complexity, requiring customers to ensure they have the capacity to staff and train their internal resources effectively.

- While Tecsys is significantly expanding use in healthcare and related sectors, its net-new WMS customer acquisition is modest, though multisite rollouts are significant.
- In some circumstances and verticals, the pricing, based on a platform fee and named users with optional add-ons such as business intelligence, demand planning, billing, transportation, delivery management and automation, appears higher than average for the general WMS market.

Vinculum

Vinculum is a Niche Player in this Magic Quadrant. Headquartered in India, with locations in the Middle East, Southeast Asia and the U.S., Vinculum provides a suite of cloud/SaaS-based solutions. The solutions are aimed mainly at e-commerce and omnichannel retail, enterprise brands going through digital transformation, darkstore/backstore fulfillment and retail-focused 3PLs. B2C and e-commerce order fulfillment play a major part in the WMS. Customers include brands, retailers, direct-to-consumer and ecosystem players (quick commerce, marketplaces or 3PLs). Vinculum also has a modest presence in B2B and nonretail 3PL (10% to 15% of its business).

In addition to WMS, its Vin eRetail suite covers omnichannel product information management (PIM), automated listing to marketplaces, omnichannel sales order management, returns, payment reconciliations, merchandising, omnichannel loyalty, and real-time view of inventory in stores and warehouses.

Vinculum did not meet the WMS revenue criterion but is included due to exceeding customer and revenue growth criteria, with a three-year CAGR of over 20%. It claims over 1,500 total customers across its suite, with 880 pure WMS customers, excluding “freemium” users. Most customers are in Asia, primarily India, with a significant presence in Southeast Asia and the Middle East. It has around 60 employees supporting WMS, focusing primarily on retail (40%) and e-commerce (32%).

Vinculum is best suited for emerging or small and midsize e-commerce and multichannel retailers and brands, quick commerce players, or regional operations of larger organizations. It is offered as part of Amazon Digital Suite to help India’s SMBs digitize operations. Vinculum’s WMS is best suited for paper- or mobile-based, manual Levels 1 through 3 warehouse operations (94% of customers). It launched its cloud/SaaS-based WMS — Vin eRetail WMS — running on AWS in 2013, with most customers multitenant cloud and the rest dedicated cloud for more complex environments. All customers are on AWS, but Vinculum is conducting a trial with GCP.

Strengths

- Vinculum has strong operations and significant customer growth in the emerging markets of India and Southeast Asia. It has a strong integration framework, leveraging APIs to connect to over 80 marketplaces, 200 web stores and 3PLs.

- Its pricing model, lower complexity and quick implementations make it attractive for organizations to rapidly set up fulfillment operations. It offers flexible pricing for customers at different stages of maturity. Most customers (80%) use an order/shipment-based subscription model with advanced annual or twice-yearly payments; 15% with expected higher volumes and complexity can request user-based pricing. Those uncertain on growth are offered gross merchandise value (GMV)-based pricing.

- Vinculum is specifically focused on multichannel e-commerce order management and fulfillment across a variety of product categories and is developing a customer base in niches such as the jewelry, FMCG, grocery and pharma industries. Its cloud/SaaS application suite offers customers the ability to rapidly scale and connect with multiple marketplaces, enabling same-day deliveries across multiple geographic locations. Some of the marketplaces offer benefits to brands using Vin eRetail WMS.

- Vinculum has introduced several product and business capabilities over the last two years, including enhancements in D2C, B2B and prebuilt integrations, support for nondelivery returns processing and pick-to-light capabilities. Its roadmap for the coming year includes 3D visualization capabilities and video capture at quality control and packing stations.

Cautions

- Vinculum continues to struggle to effectively penetrate North America and Europe, with limited direct and partner support and implementation resources. However, it plans to open offices in the U.S. and Latin America in 2Q25, with planned partnerships in Brazil, Chile and Mexico.

- Vinculum has the lowest revenue and number of WMS-focused employees among vendors included in this Magic Quadrant, and customers rely on the vendor for implementations.

- While Vinculum has higher customer number growth than others, its growth rate has declined over the last two years, and most new customers have been at lower cost within its primary markets.
- Vinculum offers less functionally rich core and fewer extended capabilities than other vendors. However, it continues to enhance its features with new releases planned to support replenishment, yard management and more advanced cycle counting, and has built focused functionalities for select industry verticals.

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

No vendors were added to this year’s Magic Quadrant.

Dropped

- Deposco was dropped from this year’s Magic Quadrant as it did not meet this year’s increased inclusion criteria on current international presence.
- Mecalux was dropped from this year’s Magic Quadrant as it did not meet this year’s tighter inclusion criteria for stand-alone WMS license/subscription revenue (excluding consulting, services, maintenance and support revenue).
- SSI Schaefer was dropped from this year’s Magic Quadrant due to not meeting this year’s tighter inclusion criteria on deployment options, stand-alone WMS revenue and strategy.

Inclusion and Exclusion Criteria

The 2025 Magic Quadrant for Warehouse Management Systems focuses on holistic global WMS suites and offerings. To be included in this research, a vendor must have a credible WMS product that fundamentally supports core WMS capabilities and some extended capabilities. The vendor must also exhibit a vision for stand-alone WMSs in at least moderately complex warehouse environments. In addition to the other criteria, a vendor must demonstrate a modest global presence by generating at least 15% of its revenue and customers outside of its home geography and have an international strategy. This research focuses on independent WMS offerings, so a vendor must routinely sell and implement its WMS separate from other related services or products that it offers. Furthermore, a vendor can qualify if it has a demonstrably differentiated and unique focus and market position in a specific vertical industry.

Gartner also takes into account vendor customer, and Gartner client interest and engagement, using both internal and external sources when considering the inclusion of vendors in the Magic Quadrant.

Vendors must meet the following criteria for inclusion:

- The vendor must provide **a holistic and credible** WMS suite that fundamentally supports:
  - **All core WMS capabilities** (e.g., receiving, put-away, stock locating, inventory management, cycle counting, wave planning, order allocation, order picking, replenishment, packing, shipping).
  - **Natively supports mobile devices** along with bar code scanning and possibly RFID or other scanning/sensing technologies.
  - **Supports some extended capabilities** (e.g., labor management, slotting, task interleaving, work planning and optimization, yard management, voice picking, parcel manifesting, value-added services, light manufacturing/kitting and third-party logistics [3PL] billing).
  - The vendor must be **available commercially via cloud deployment**. This can be achieved with an offering of one or a combination of dedicated cloud or multitenant cloud WMS.
- **Significant WMS market presence:** For the previous fiscal year, the vendor must have (all revenue numbers in USD constant currency):

- **Combined WMS license/subscription and services revenue** of greater than $30 million for the previous 12 months. Only license/subscription and implementation services associated with the vendor's packaged WMS implementations are considered. Revenue from hardware and/or ancillary consulting services is excluded.

- **Or:** The vendor must have a three-year compound annual customer and revenue growth rate of at least 20%. This is because customer and revenue growth are reliable indicators of vendor momentum and sustainability.

- **And**: The vendor must have WMS license and/or subscription revenue only of greater than $10 million for the previous 12 months (all revenue numbers in USD constant currency). Only license/subscription revenue associated with the vendor's packaged WMS are considered. All consulting, services, maintenance and support revenue is excluded.

- **And:** The vendor must have at least 200 live individual customer references (named customer references, not individual warehouse sites) holistically using the version of the WMS solution (not WES or other) being evaluated.

- **And:** The vendor must have sold at least 15 net-new customers (not warehouse sites) in the previous 12 months.

- **And global presence:** The vendor must receive greater than 15% of its WMS revenue and have greater than 15% of its customer base sold, implemented and headquartered outside of its home geographical region (for example, North America, Europe, Asia or Latin America).

- **And:** The vendor must have direct or affiliate sales and implementation resources in three or more geographical regions (for example, North America, Europe, Asia, or Latin America).

- **And:** The vendor must have more than 20% of its WMS business stand-alone where WMS is sold and implemented independently of its other related services or products. This WMS must be sold separately, not simply as a part of a combined WCS and WMS or WES and WMS or service offering.

- **Or significant enterprise business applications software presence:** The provider must be an application megaprovider with greater than $1 billion in enterprise application software license revenue (including non-WMS) in the previous fiscal year (all revenue numbers in USD constant currency). This is because many end users are interested in the

WMS offerings of the major application suite vendors. The WMS component must be part of a suite that is active in the market and provides more than basic core WMS capabilities. The vendor must have sold at least 25 net-new named WMS customers in the past 12 months as well as have at least 200 live WMS customers (not warehouse sites).

- **Or a unique and compelling market position in a specific vertical industry:** The vendor must have a unique, compelling and differentiated market position in a specific vertical industry where this differentiation is important to buyers. New customer win rates, vendors appearing in Gartner client inquiries in these industries, explicit vendor focus in these industries, client references and the vendor's reputation in the industry are considered. The vendor must also meet the revenue and number of customers criteria (i.e., WMS revenue of greater than $30 million and at least 200 live individual customer references [not warehouse sites] using the WMS).

We do not include stand-alone, specialist component providers of solutions, such as yard management, slotting, labor management, parcel manifesting, optimization tools, radio frequency (RF), voice, RFID, warehouse control systems or warehouse execution systems. We do not evaluate specialized WCSs, robotics integration solutions or WESs that are the middleware between the WMS business application and material handling equipment (see **Use the Right Software to Support Warehouse Automation and Robotics**). However, we do consider a WMS vendor if it offers a native warehouse control system or other specialist components as part of its WMS offering. In addition, because they are not relevant as stand-alone WMSs, we do not evaluate every ERP, MHE, OMS or suite vendor's WMS capabilities, even though these might address a particular customer's WMS needs.

Some vendors with strong WMSs, but whose businesses are principally in a single geography, did not qualify for this Magic Quadrant. This, in particular, impacted a number of WMS vendors based in Asia and Europe (see **Europe Context: Magic Quadrant for Warehouse Management Systems** and **Asia/Pacific Context: 'Magic Quadrant for Warehouse Management Systems'**). Please see also **Midmarket Context: 'Magic Quadrant for Warehouse Management Systems'** and **Automated Material Handling Equipment Provider Context: 'Magic Quadrant for Warehouse Management Systems'** for more insight on vendors with relevance for those geographic regions and industries.

Evaluation Criteria

Ability to Execute

Depth and breadth of WMS functionality remain very important factors in choosing a new WMS, especially for companies replacing aging legacy systems or those needing to support notably new business capabilities. Increasingly, the systems/technical architecture of the WMS is an important consideration for new WMS customers where cloud, adaptability, extensibility and user experience are priorities. Furthermore, while companies are buying WMS applications, they are also investing in a long-term relationship with a vendor, which increases the importance of operations and viability. Consequently, while the breadth and depth of the WMS product remain important, customer service and operations have nearly an equivalent impact on a vendor's overall Ability to Execute. Gartner finds that customers place high importance on a vendor's ability to provide the services and support necessary to effectively implement and utilize the WMS. Service is a notable differentiator among various WMS providers, and it contributes to implementation success and overall customer satisfaction as well as impacting upgrade cycles and TCO. Historically, independent WMS vendors have provided the majority of implementation services. However, certain vendors, though not all, have robust ecosystems of implementation partners that can supplement, enhance or replace the vendor's service capabilities.

The criteria used for evaluating a vendor's Ability to Execute include:

- **Product or Service —** Because of the intense transactional nature of warehousing systems, Gartner places a high value on both an offering's product and service. WMS vendors' product breadth, depth and technology are highly rated components of their Ability to Execute. Therefore, we give this criterion a high weighting. The WMS market is mature and remains highly competitive, with core WMS capabilities approaching parity across vendor offerings. However, notable differences remain in extended WMS capabilities (see **Apply an Architectural Framework to Stratifying Warehouse Management Systems**). We evaluate the WMS products across a range of criteria, including technology, functionality and usability. We consider the depth and flexibility of core capabilities such as receiving, put-away, picking, shipping, replenishment, quality assurance and cycle counting. We also consider the existing breadth of the application's extended WMS capabilities, such as value-added services and light manufacturing, labor management, slotting, yard management, dock scheduling, automation interfaces and resource/work planning. Users with the most complex requirements and sophisticated operations are the most interested in a vendor's support for extended WMS capabilities, which remains a differentiating factor across various WMSs. Less sophisticated or less complex users are more focused on core WMS capabilities and often require less functional breadth, allowing them to be supported by a wide variety of solutions. Because of the importance of usability, adaptability and flexibility, we place increased importance on the systems/technical architectures of each WMS. Due to the growing demand and prevalence of cloud WMS, we also place emphasis on the vendor's cloud strategy, maturity of its cloud service offering and the technical architecture of the vendor's cloud WMS offering.

- **Overall Viability —** Near- and long-term investment risks are important issues for buyers, so vendor and product viability remain important criteria. Given the high switching costs, long time to value, challenging ROIs and long life span of typical WMS implementations, viability is again a high-importance consideration. Therefore, we give viability a high weighting. Although viability is important, it should not overshadow product fit, vendor expertise, TCO, and service and support. Some vendors are quite small. While there are some viability concerns given their size, all other factors being equal, viability alone should not preclude users from considering these vendors.

- **Sales Execution/Pricing —** Sales execution and pricing are growing differentiators in the WMS market, especially internationally in emerging geographies. Sales execution and pricing are important to a vendor's performance and are notable indicators of its Ability to Execute. Therefore, this factor has been given a high weighting. Price variability is significant with cloud-based WMSs, where subscription-based pricing models dominate and de facto cross-industry standards are yet to solidify. Because this is a global evaluation, the ability of a vendor to support global sales and go-to-market channels is also increasingly important. We consider vendor capabilities for supporting multinationals choosing global solutions as well as for customers buying in select geographies.

- **Market Responsiveness/Record —** The WMS market continues to evolve rapidly, and WMS solutions must keep pace to remain relevant. This makes market responsiveness and track record meaningful. We assess the historical and current performance of vendors in adding to or enhancing their WMS solutions to keep up with the changing wants and needs of WMS users. As such, we give market responsiveness/record a medium weighting.

- **Marketing Execution —** While marketing promotion is important, we focus more on a vendor's product marketing. We examine the vendor's product management team, processes and product roadmap to support ongoing innovation, track record of delivering on plans and ability to respond to market forces. We also look at a vendor's visibility in the market and how often they organically appear on buying long lists, which is indicative of a compelling go-to-market strategy and execution. As such, we give marketing execution a medium weighting.

- **Customer Experience —** A WMS vendor's ability to use and exploit functionality to drive business value and provide a suitable customer experience is a critical element of its Ability to Execute. We consider a vendor's track record with complex and sophisticated customers, but also its ability to effectively and efficiently service less-demanding customers that make up a large percentage of the overall WMS market. Also important is client satisfaction with a vendor's products and services, the extent of the vendor's warehousing experience and how it can employ this to help customers fully exploit their WMS investments. Although client satisfaction is always important, we also consider the nature of the relationships that vendors establish with clients, and whether these are operational or strategic. The size and growth of a vendor's client bases locally and internationally are also very important because they demonstrate the vendor's ability to identify and satisfy the needs of customers around the world. Thus, we give customer experience a high weighting.

- **Operations —** Operational competence is a very important criterion. It considers a vendor's ability to meet its goals, obligations and commitments on an ongoing basis. There are marked differences in capabilities across vendors, as confirmed by customer references and Gartner client interactions. Vendor support, maintenance, business and technical consulting, and field operations are important parts of the WMS selection process. Factors include the quality of the organizational structure as well as the skills, experience, programs, systems and other vehicles that enable an organization to operate effectively and efficiently on an ongoing basis. As projects become more complex, a vendor's ability to not only sell and implement a solution but also help customers fully exploit their WMS investments is critical to long-term success. Finally, a vendor's management structure, experience, skill and expertise play a significant role in its ability to harmonize its vision, strategy, tactics and actions. Therefore, we give operations a high weighting.

Ability to Execute Evaluation Criteria

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

Source: Gartner (May 2025)

Completeness of Vision

Vendors' domain expertise, technology vision and vision for the WMS of the future rank highly. We consider vendors' knowledge and vision for warehousing and, more broadly, logistics management both locally and internationally. We also consider a vendor's vision for warehouse process innovation, not simply process execution, which involves demonstrating a compelling vision for how warehousing, business and logistics trends will influence warehousing and WMSs in the future. While the emergence of newer deployment models like cloud and multitenant SaaS previously differentiated WMS vendors, the impact of deployment models has diminished as the majority of WMS vendors now provide some form of cloud offering. However, there remains a continuing debate among vendors and buyers on whether multitenant SaaS is demonstrably better than dedicated cloud. We consider these factors in our evaluation.

A WMS is one important part of integrated logistics, or what Gartner refers to as SCE convergence. Consequently, vendors are also evaluated on how well they understand this emerging concept and what strategies they have to move in this direction. While having a WMS vision is notable, a vendor's vision for broader SCE convergence is critical to moving farther to the right side of the Magic Quadrant, and this differentiates offerings. Because SCE convergence is an emerging best practice, we also consider vendor strategies to support this concept beyond basic data or transaction integration.

The criteria used for evaluating a vendor's Completeness of Vision include:

- **Market Understanding —** Although the WMS market is mature, we see an accelerated need for innovation in areas such as user experience, adaptability, decision support, material handling automation and robotics integration, and work planning and optimization. The dramatic changes embodied in ongoing market shifts will require considerable nimbleness and competency as well as investment on the part of vendors. Therefore, in this Magic Quadrant, we place strong emphasis on a vendor's understanding of these market dynamics and its product strategies to support these needs. Exhibiting and articulating a vision for where WMSs will be in the future and exhibiting an innovative culture remain distinguishing characteristics among vendors. A demonstrated knowledge, proficiency and differentiated vision of the current and future warehouse management marketplace are critical considerations. Market understanding assesses the WMS vendor's ability to understand WMS buyers' wants and needs, and to translate them into products and services. Vendors that show the highest degree of vision listen to, anticipate and understand buyers' wants and needs, and can augment customer insight with their own WMS visions. Vendors that simply respond to current market requirements without anticipating future requirements will likely be unsuccessful over the long term. Consequently, we give market understanding a high weighting.

- **Marketing Strategy and Sales Strategy —** Until recently, marketing strategy and sales strategy have had modest impacts on the WMS market, which has historically been dominated by specialist vendors focused on warehousing and logistics. Today, marketing and sales strategy are becoming more important, particularly as megavendors become stronger WMS providers. Furthermore, as cloud becomes the dominant WMS delivery model, a vendor's approach to promoting its offering becomes more important. We consider vendors' strategies for establishing their WMS brand and how they develop strategies and tactics for local and international expansion. Therefore, we give marketing strategy and sales strategy each a medium weighting.

- **Offering (Product) Strategy —** Offering (product) strategy is critical and has a high weighting. It refers to a WMS provider's approach to product marketing, R&D and solution delivery that emphasizes differentiation. We consider strategies for functionality, usability, technology, adaptability, delivery methodologies and feature sets as they map to current and future WMS requirements, market trends and technology evolutions. In addition, we consider vendors' SCE convergence strategies for supporting end-to-end processes that span functional areas, such as order management, warehouse management, transportation, trade compliance, manufacturing and materials safety. A vendor's understanding of these market changes and its product strategies for successfully navigating these changes significantly influence its Completeness of Vision. All qualifying solutions in this Magic Quadrant handle basic core WMS capabilities.
  - Another distinguishing characteristic of vendors moving to the right in the Magic Quadrant will be the breadth of their WMS — what Gartner refers to as an "extended" WMS. We place importance on the vendor's current and planned support for WMS "systems of innovation" capabilities. These include value-added services and light manufacturing, labor management, slotting, yard management, dock scheduling automation interfaces, resource/work planning, SCE convergence and enhanced user experience. Finally, the technical architecture of the WMS has become a notable distinguishing characteristic of various offerings. We observe significant differences in strategies, visions and product roadmaps related to architectural issues, such as user experience, adaptability, flexibility, composability and the exploitation of advanced capabilities like analytics and AI.
- **Business Model —** The soundness and logic of a vendor's underlying business propositions are key indicators of a vendor's sustainability and how its overall strategies and tactics might affect its ongoing success in the WMS space. For example, one vendor might focus on organic innovation while another might concentrate on buying innovation through mergers and acquisitions. While the former might have a longer gestation period, it has potential product and technical advantages. The latter might allow a vendor to get to market faster but could lead to longer-term product issues. This year, continued emphasis has been placed on a vendor's business model, processes and the maturity of its cloud offering. Therefore, we give business model a medium weighting.
- **Vertical/Industry Strategy —** Because of the maturity of the WMS market, many vendors have customers across multiple industries and have added the necessary functionality to support the needs of various industries. However, there are some limited instances where

vertical/industry strategies can be more important in certain areas where the specific industry needs are unique and require specialized capabilities in or around the WMS. For example, WMSs serving healthcare provider networks need strong integration with patient care. We consider not only product functionality but also how vendors address industry verticals from a product management and go-to-market perspective. While vertical/industry strategy is evaluated, it is not considered critical, so we give it a low weighting.

- **Innovation —** Innovation and thought leadership continue to play a strong role in this year's evaluations because innovation remains a critical differentiator. Vendors must demonstrate the ability to continuously support innovation by staying close to the most creative solutions or complicated problems in the market to drive pioneering functionality. While thought leadership is high-ranking, a track record of commercializing innovation is equally, if not more, important. Leading vendors continue to enhance core WMSs but also invest in an extended WMS, where a greater emphasis is placed on improving warehouse performance through decision support, analytics and optimization. We also evaluate how a vendor is innovating with respect to SCE convergence, particularly in WMS integration and process orchestration with yard, dock, TMS and manufacturing. Innovation is not exclusive to product functionality; go-to-market and delivery originality can also be notable sources of solution differentiation. Leaders and Visionaries will be the vendors at the forefront of transformation; consequently, we give innovation a high weighting.

- **Geographic Strategy —** Geographic strategy looks at technology providers' strategies for directing resources, skills and offerings to meet the specific needs of global logistics in terms of a multigeography WMS, including multilanguage and multicurrency. We also assess vendors' abilities to support global warehousing requirements beyond core WMS functionality as well as how they plan to address the varying needs of WMS users around the world. Geographic strategy is increasingly important for maintaining a strong presence throughout the global market. Several vendors did not qualify for this research because they lacked the necessary global presence, though many of these remain strong offerings in their respective regions. This research is focused on the global WMS marketplace; thus, we give geographic strategy a high weighting.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (May 2025)

Quadrant Descriptions

Leaders

Leaders combine the uppermost characteristics of vision and thought leadership with a strong, consistent Ability to Execute. Leaders in the WMS market are present in a high percentage of new WMS deals, win a significant number of them and have a large and growing customer base. They have robust core WMSs and offer reasonable — although not necessarily leading-edge — capabilities in extended WMS areas, such as labor management, work planning and optimization, slotting, returns management, yard management and dock scheduling, and value-added services.

To be a Leader, a vendor doesn't necessarily need to have the absolute broadest or deepest WMS application. But its offerings must meet most mainstream warehousing requirements in complex warehouses without significant modifications and a substantial number of high-quality implementations must be available to validate this. Leaders must anticipate where customer demands, markets and technology are moving, and must have strategies to support these emerging requirements ahead of actual customer demand. Leading vendors should have coherent strategies to support SCE convergence and they must invest in innovation, have a proven track record in commercializing advancements and have processes to exploit innovation. Leaders also have robust market momentum, market penetration and market awareness as well as strong client satisfaction — in the vendor's local markets as well as internationally. Leaders understand the importance of alliances and develop robust ecosystems of partners. Because Leaders are often well-established in leading-edge and complex user environments, they benefit from a user community that helps them remain in the forefront of emerging needs.

Key Characteristics:

Reasonably broad and deep WMS offerings

Proven success in moderate- to high-complexity warehouse environments

Participation in a high percentage of new deals

Strong new customer growth

Large customer-installed base

A strong and consistent track record

Consistent performance and vigorous new client growth and retention

Enduring visibility in the marketplace from both sales and marketing perspectives

Compelling SCE convergence strategy and capabilities

A proven ecosystem of partners

Global scale

Challengers

The critical characteristic of Challengers is that they have capable, proven and mature products, with numerous live customers and an overall solid and well-recognized position in the marketplace. They also have consistent track records of successful implementations.

Challengers' offerings often run some very large and complex warehousing facilities. These solutions are in use by a large number of individual enterprises supporting multiple warehouse operations locally and worldwide. While vendors in this quadrant provide solid and established WMS solutions, there is generally one or more insufficiencies in their offerings or go-to-market strategies when compared with Leaders. These solutions are preferred by buyers that favor Ability to Execute over Completeness of Vision. Challengers can have practical visions for their solutions and, more generally, SCE. But their delivery against vision and thought leadership is typically not on par with solutions from the vendors in the Leaders quadrant.

Key Characteristics:

A capable, proven and mature WMS, with numerous live customers

A consistent track record of successful implementations

Often run some large and complex warehousing facilities

Offerings are not as broad or deep as WMS Leaders

Lacking or trailing in having a compelling SCE convergence strategy and capabilities

Generally lacking the overall thought leadership, innovation or compelling visions of next-generation WMSs

Visionaries

To be a Visionary, a vendor must have a coherent, compelling and innovative strategy that seeks to deliver a differentiated, robust and vibrant offering to the market. Visionaries are often thought leaders in one or more WMS solution dimensions (for example, functionality, services, vertical industry, or go-to-market or deployment strategies) and they tend to be on the leading edge of some emerging concepts. However, these offerings have some deficiencies in their Ability to Execute in areas such as viability, growth, global scale or operations. At a minimum, vendors in the Visionaries quadrant fall into one of two broad categories. They can be established WMS vendors that have yet to mature into leading positions in the market, or they can be innovative specialist vendors with unique and potentially disruptive views of where the market is going. These vendors can exhibit innovation in some areas but lack it in other areas.

Key Characteristics:

A coherent, compelling and innovative strategy that seeks to deliver a robust and vibrant offering to the market

A thought leader in one or more WMS solution dimension that tends to be on the leading edge of emerging concepts

A yet undemonstrated ability to handle a broad range of complex user requirements

Execution gaps (e.g., viability, growth, global scale or operations)

Lacking or trailing in having a compelling SCE convergence strategy and capabilities

Differentiated innovation in WMS products, services, vertical, or go-to-market or deployment strategies

Niche Players

Although there might be an assumption that vendors in the other quadrants are better choices for new WMS buyers; in certain circumstances, Niche Players are just as good or better choices for prospective users. This is because they might focus on a geographic or vertical component of the market that is meaningful to particular users. However, this focus alone is not a compelling enough differentiator for a vendor to occupy a leadership position. It would also have to perform well in other dimensions. Although some vendors in the Niche Players quadrant have solid WMS solutions for a specific industry or geography, their solutions are not as broad as those in other quadrants. They likely won't evolve enough to comprehensively support SCE convergence for the foreseeable future.

Key Characteristics:

Might focus primarily on a geography or vertical market

Not a generally differentiated offering, although may have some unique capabilities

May not be well-established and visible in the broader WMS market but have growing visibility in their target market

A narrow focus on specific WMS features (i.e., not as broad or deep a WMS)

Market momentum and product or company viability may be in question

Lacking in SCE convergence

Context

The overall WMS market breaks down into five broad types of vendors, the first four of which are covered in this Magic Quadrant:

- **Application megavendors —** These vendors offer broad portfolios of applications across many application categories (e.g., back-office financials, human capital management [HCM], customer relationship management [CRM], customer order management, manufacturing, enterprise resource planning [ERP] and supply chain management [SCM]). While these vendors might offer a variety of supply chain management (SCM) solutions, they do not necessarily offer an integrated platform. Infor, Microsoft, Oracle and SAP are considered megavendors with WMS offerings.
- **SCM suite vendors —** These vendors offer a holistic WMS, plus a portfolio of two or more applications focused primarily on SCM. This can include aspects of logistics (e.g., warehousing, transportation and global trade), supply chain planning (SCP), customer service (e.g., order management and omnichannel management), manufacturing or sourcing and procurement, but not other functional areas such as financials, CRM or HCM. While these vendors might offer a variety of SCM solutions, they do not necessarily offer an integrated platform — although some do. Vendors in this category include Blue Yonder, Infios (formerly Körber) and Manhattan Associates.
- **Specialist WMS suite vendors —** These are independent software vendors (ISVs) that focus primarily, but not necessarily exclusively, on holistic WMS suites. In addition to WMSs, they might offer complementary capabilities, but these remain a modest percentage of their business. Vendors in this category include Ehrhardt Partner Group (EPG), Generix Group, Made4net, Mantis, Reply, Softeon, Synergy Logistics, Tecsys and Vinculum.
- **Material handling equipment/automation vendors —** Most MHE vendors primarily focus on providing the electromechanical aspects of large-scale automated warehouses. However, many of these vendors also offer some WMS capabilities as part of their product portfolios. We only cover MHE firms as part of this research if they can demonstrate that they routinely sell their packaged WMS application completely independently from their MHE at a substantial level. They must also have a stand-alone strategy to do so long term in addition to offering cloud deployment options. This is because these firms do not

typically offer their WMSs to the market independent of their MHE solutions. Dematic is a vendor in this category that qualified for inclusion in this Magic Quadrant. For more details on vendors in this category, see **Automated Material Handling Equipment Provider Context: 'Magic Quadrant for Warehouse Management Systems'**

- **Independent WMS component vendors —** Not covered in this Magic Quadrant, these vendors are specialized ISVs that do not offer a full WMS but instead focus exclusively on offering stand-alone components (or point solutions) that can be used to supplement a WMS. Examples of these components include workforce/labor management, slotting optimization, multicarrier parcel management, yard management, dock/appointment scheduling, warehouse control systems (WCSs), warehouse execution systems (WESs), multiagent orchestration (MAO) platforms and other specialized add-on solutions. For vendors in this category, see **Market Guide for Yard Management**, **Market Guide for Multicarrier Parcel Management Solutions** and **Hype Cycle for Supply Chain Execution Technologies, 2024**.

WMS Market Considerations

All solutions in this Magic Quadrant support basic core WMS capabilities. Many also support various levels of extended WMS. Core WMS capabilities are the basic functions of receiving, put-away, storing, counting and picking, packing and shipping goods. Extended WMS capabilities are value-added capabilities that supplement core functions, such as labor management, slotting, yard management and dock scheduling (see **Apply an Architectural Framework to Stratifying Warehouse Management Systems**).

Despite being a very mature market, recent macro factors and disruptions have spurred innovation. However, while economic and business conditions are challenging for some vendors and regions with regards to new customer acquisition, the overall market reached $3 billion in 2024. WMS offerings continue to differ in areas such as usability, adaptability, decision support, scalability in both up and down markets, use of emerging technologies and life cycle costs. Furthermore, customers increasingly favor SCM suites that can support end-to-end supply chain and logistics process orchestration. Gartner refers to these areas as supply chain convergence and supply chain execution convergence (related to convergence of operational activities).

The focus on breadth and depth of WMS offerings remains valid for the most sophisticated operations, while other factors such as simplicity, usability and cost of ownership are more important in less-complex environments. However, we continue to see a divergence in the

WMS market between the high-performance, complex and sophisticated end of the market and the mass market, where functionality needs only to be "good enough." This is not because companies choose to sacrifice functionality; it's because globally, the preponderance of warehouse operations are Level 3 or below in Gartner's warehouse complexity model. Gartner defines Level 1 as the most basic warehouse operation and Levels 4 and 5 as the most complex and automated. Warehouses at Level 3 and below do not require, nor would they normally use, the most advanced functionality. See **Tool: Stratify Your Warehouse Operations to Determine the Right-Fit WMS and Improvement Strategy** for more insight on level-setting warehouse operations.

This divergence highlights that there is a very clear market for high-end WMS solutions where feature/function and performance are critical and cost is not the highest priority. It makes for a healthy, albeit smaller, market for high-end, functionally advanced WMS solutions aimed at complex and sophisticated Level 4 and Level 5 operations. Conversely, there is another market where other factors dominate, such as ease of use, reliability, service and support, "good enough" features and lower cost of ownership. This is a very large WMS market for what Gartner's stratification model would call Level 2 and Level 3 warehouse environments. Here, companies could be served well with any good WMS, and they could be satisfied with a megavendor-provided WMS or a less functionally robust ISV WMS offering.

Although functionality remains the primary user evaluation criterion, there's near-functional parity for basic core WMS capabilities across WMS providers. Given the mature state of the WMS marketplace, among other factors, a combination of the following vendor and product factors affects the positioning of vendors in this year's Magic Quadrant:

- The vendor's market understanding and its vision for next-generation WMSs and supply chain execution.
- The vendor's proven track record of commercializing, delivering and deploying innovations to the market.
- Investments to address total cost of ownership and customer time to value.
- The WMS's systems/technical architecture to support composability, adaptability and extensibility.
- The vendor's cloud strategy, capabilities and systems/technical architecture and deployment model options (e.g., dedicated or multitenant cloud SaaS).

- The long-term viability of the vendor and product, given the long life span of WMSs.
- Current and projected growth of both revenue and total number of clients.
- Vendor market awareness, name recognition and reputation.
- Product or vendor differentiation.
- Stability of the product and security of data and processes.
- Compelling or differentiated business model.
- Ability to translate business goals and objectives into specific WMS functional requirements.
- The vendor's ability to sell, implement, service and support global deployments.
- The vendor's ability to deliver value through service, support, consulting and training.
- The vendor's openness to, and support of, an ecosystem of partners.
- Tools and technologies embedded in the WMS to facilitate and streamline implementations.
- Customer experience (from customer references and Gartner customer interactions).
- SCE convergence strategy (a seamlessly integrated SCE orchestration platform).

Gartner continues to find that WMS buyers place particular emphasis on WMS product breadth and depth, vendor expertise, and customer service and support. Usability, systems/technical architecture as well as vendor and product viability, TCO and time to value, have become increasingly important criteria, almost on par with the importance of functionality. As basic core WMS has approached parity in the market, implementation tools and methodologies, as well as integration with other applications, have become more important considerations in customer evaluations.

Customers now focus more attention on the value-adding capabilities that surround core WMS capabilities, due to the compelling need to address labor shortages and rising costs. Examples include workforce management, task interleaving, slotting, yard management, dock scheduling and performance management. These have now become common requirements in all but the most basic WMS deals. Furthermore, labor shortages are motivating companies to consider various forms of automation — from intralogistics smart robotics increasingly found across various strata of operations, to complex conventional material handling automation systems that are often found in Level 5 warehouse operations. Consequently, buyers are increasingly interested in how various WMS offerings will support various types of automation both now and in the future. Additionally, labor shortages are compelling organizations to look for support in getting the most out of the workers they do have with tools to support better usability, employee engagement and gamification.

Cloud has become the preferred WMS deployment option, with more than 80% of new customers preferring cloud if the economics are reasonable. However, with a large existing installed base for on-premises WMS, a little over 35% of completed deployments are cloud, with around 12% being multitenant cloud. In low- to moderate-complexity warehouses, subscription pricing models for cloud/SaaS WMSs reduce short-term costs, which is fueling increased interest in this market. However, for larger and more complex environments, WMS cloud pricing is confusing to buyers since a de facto standard pricing model has yet to emerge, and long-term (10- to 15-year) costs seem unreasonably high to many buyers. Furthermore, while named users was the dominant pricing model for on-premises WMS, more recently, pricing based on order lines, license plate numbers (LPNs), both human and mechanical users and other factors are emerging as an option. This trend exacerbates buyer confusion when comparing offerings with notably different pricing methodologies, and sometimes, a variety of pricing metrics to take into account.

Systems/technical architecture, integration capabilities and adaptability are now key considerations in WMS evaluations. Finally, companies have expanded their numbers of distribution points and have evolved to more distributed networks. To support diverse operations, organizations have warehouse operations that span from very simple Level 1 warehouses to highly complex and automated Level 5 warehouses, and everything in between. While functional depth and breadth are important for the complex operations, simplicity and ease of use are much more compelling needs for Level 1 and Level 2 operations.

Market Overview

There are no new entrants to this year’s Magic Quadrant, and three vendors were dropped due to increased requirements for global, revenue, customer, product, deployment option and stand-alone strategy inclusion criteria for this Magic Quadrant. Despite the market maturity and challenging economic, business and new customer acquisition conditions for some vendors and regions, the overall market exceeded $3 billion in 2024 and has a five-year CAGR forecast in double digits. While we have seen notable revenue growth, much of it stems from existing customer expansion, and the impact of licensing models shifting from on-premises to SaaS, which has increased pricing. Some vendors are also benefiting from migrating legacy customers to their newer offerings. However, net-new customers are scrutinizing the total cost of ownership (TCO) more closely, which has slowed new customer acquisition overall compared to previous years, although it continues to grow significantly.

Vendor and product evaluations for this Magic Quadrant have become more demanding, particularly in areas such as customer numbers and geographic presence and strategy. This has made it harder for some vendors impacted by continuing disruption and significant macroeconomic and geopolitical impacts on customers and resources. While many have experienced slowed growth, others have benefited from a renewed focus on industry strategies, more competitive pricing and enhanced usability. This includes additional areas such as e-commerce, support for automation and intralogistics, smart robotics, advanced analytics and various use cases for AI/ML and computer vision.

The following themes are emerging:

Artificial Intelligence: Many of the vendors in this Magic Quadrant, including megavendors, are continuing to build out new use cases for various forms of AI, notably most recently GenAI and vision AI. Many vendors have adopted limited forms of basic AI and machine learning to add more sophisticated intelligence to their applications. More recently, some vendors have begun piloting GenAI, with a few already having live releases. They are using controlled internal datasets to provide back-office support in areas such as training and implementation materials, as well as deploying intelligent chatbots for assistance. Others are exploring further use cases and broader data sources in areas such as coding and chatbots that allow end users to conversationally query the WMS. Gartner has also seen an increased focus on AI-enabled vision systems for the warehouse and yard across both enterprise and midmarket, supported by multiple WMS vendors.

Cybersecurity: We see greater client concern over cybersecurity. One former and two current WMS Magic Quadrant vendors have been impacted by cyberattacks in the last two years. Two are still impacted: one in back-office functions and the other in some legacy but significant private cloud customer deployments. To date, there have been no reported breaches involving deployments on new public cloud instances supported by hyperscalers.

Implementation resource constraints and tools: Both vendors and Gartner end-user clients have reported continued constraints on WMS implementation resources, prompting organizations to seek other forms of support and innovative deployment approaches. Furthermore, the time and costs for WMS implementations remain lengthy and high, respectively.

Adaptability and extensibility: Given the ongoing impact of disruptive events from the last few years to the present, there has been increased demand for adaptable, extensible solutions, cloud deployments, composability and support for automation and robotics.

Robotics and automation: In addition to WMS vendors expanding their native capabilities and partner support in this area, MHE automation vendors such as Dematic, KNAPP, Mecalux and SSI Schaefer continue to build out their WMS capabilities. Some of these vendors, like Knapp and Mecalux, are expanding their hardware and supporting software into intralogistics smart robotics and AMRs.

Pricing and total cost of ownership: Flexibility in commercial terms is becoming more compelling to customers as there is a greater focus on affordability. Some vendors are retaining high pricing, while others are aggressively competing on price to gain market share. Still others are offering seasonal software and hardware subscriptions, which are appealing to companies with significant seasonal fluctuations.

Long-tail market: Gartner started the process for this research by considering more than 80 WMS providers, but only the 17 vendors featured provided the evidence that they met the documented inclusion criteria. The WMS market is characterized by a long-tail distribution, with seven vendors dominating in terms of the number of customers, WMS revenue and geographic scope. Yet, there are many other WMS vendors with viable offerings gaining ground, including those that did qualify for this research and others that did not. Requirements for international sales and revenue have once again impacted certain regional WMS vendors that have good offerings but currently lack the appropriate level of international revenue and customer numbers to qualify.

Market consolidation and ecosystems: The trend of acquisitions, investments and restructures within the WMS market seen over the previous three years continued into 2024 and early 2025. Some have acquired WMS vendors, and certain WMS vendors expanded their supply chain execution portfolios by acquiring capabilities like order management, transportation management, yard management and returns management. Aptean acquired Principal Logistics Technologies and Indigo Software, Blue Yonder acquired flexis AG and

One Network, EPG acquired byways, Generix Group acquired Keyneo, Hardis Group acquired Magnus Black, Körber acquired MercuryGate, has undergone a management restructure and has rebranded to Infios while conducting closer collaborations with vaibe (within the greater Körber group). IMI Supply Chain Solutions acquired Promosoft, Shipsy acquired Stockone and Unicommerce acquired a significant stake in Shipway. These and other recent acquisitions bring opportunities and risks for vendors and their clients and prospects. We are also seeing greater availability and exploitation of application ecosystems moving beyond midmarket WMS into enterprise. While some WMS vendors are attempting to grow into SCE/SCM suite providers with acquisitions and organic development, that is not the case for all. A number of vendors, while still heavily focusing on WMS, are building out technology partnerships to compete on an ecosystem basis.

Vendor-specific considerations include:

Specialist WMS vendors and SCM suite providers continue to dominate the most sophisticated and complex warehouse environments due to the breadth and depth of their current applications, their thought leadership and their position as vendors that others look to emulate. They have moved beyond basic WMSs, expanding their portfolios vertically and horizontally. In this Magic Quadrant, Blue Yonder, Infios (formerly Körber) and Manhattan Associates remain in the Leaders quadrant largely due to their experience serving large, complex users with functionally broad and deep WMSs, although Infios is refocusing on its core midmarket origins. These vendors tend to differentiate themselves most when extended WMS capabilities are a greater aspect of the functional evaluation because their systems are broader and deeper in these areas. Their solutions have been implemented in some of the most complex warehouse environments. Moreover, these vendors have extensive experience in SCE, as well as compelling visions for how WMSs and, more broadly, SCE will evolve over the next five years.

Megavendor WMSs (i.e., Infor, Microsoft, Oracle and SAP) continue to evolve, adding depth to their core WMS capabilities as well as some extended WMS capabilities, with some of them working to improve facets such as usability. Although these solutions have yet to match the overall depth and breadth of Blue Yonder and Manhattan Associates, they have become viable alternatives for existing customers of the megavendor, who are seeking “good enough” WMS capabilities. Additionally, most of the megavendors are demonstrating benefits by offering access to their group’s depth of support for technologies such as advanced analytics and AI/ML. We have yet to see other large vendor types, such as MHE vendors, exploiting the same depth and breadth of support leveraged to their WMS customers or prospects.

Infor, Oracle and SAP remain in the **Leaders** quadrant this year due to several factors. These include the relative consistency of their market growth, ability to serve global customers, innovation in areas surrounding WMSs, compelling SCE convergence strategies and overall market acceptance. These megavendors have momentum internationally because they are organizationally well-positioned globally. Furthermore, the majority of companies in emerging geographies lack the process maturity or WMS sophistication to necessitate the adoption of the most functionally robust solutions, making the WMS of their suite provider acceptable. This does not mean that other vendors don't have advantages worth considering by prospective customers. For example, customer intimacy, time to value, depth and breadth of functionality, geographical scope or vertical industry expertise could all favor other vendors in certain circumstances.

The **Visionaries** quadrant is populated with vendors solidifying their positions as thought leaders while still developing their Ability to Execute. They exhibit one or more of the following characteristics: innovative and differentiated solutions, a compelling and unique position in a specific vertical market, or distinctive go-to-market strategies. Vendors in this quadrant, while innovative and offering intriguing solutions, have yet to solidify their long-term viability and global market positions. Softeon, although small, is an innovator leveraging a strong service-oriented architecture (SOA) platform to challenge the traditional WMS vendors. It is extending WMS concepts into unique markets, such as digital product logistics. Reply maintains and improves its position in this quadrant, mainly due to its innovative approach to WMS architecture, supporting technologies and cloud-first strategy. Reply is also one of the vendors most aggressively pursuing various use cases for AI, ML and advanced optimization, including new product releases such as GaliLEA.

Several vendors are positioned in the **Niche Players** quadrant. Niche Players' solutions are often functionally sufficient or, in some cases, excellent choices for many companies addressing a variety of needs, some of which are outside pure WMS capabilities. This would include Vinculum's ease of integration with marketplaces. However, these offerings might lack the global scale, WMS depth or breadth, R&D investment, number of clients, customer references or business viability of the leading vendors in the market. Dematic is notable for its gradual evolution from merely being an MHE vendor with some software solutions, to a more serious contender with a strategy to rearchitect, align and consolidate its various WMS, WCS and optimization offerings for customers. Synergy Logistics is notable for its support for rapid deployments and has been expanding its remote deployment tools and robotics support capabilities. Made4net, following its acquisition by Ingka Group, continues to operate independently and retains significant CAGR for revenue and customers. Mantis is notable for its flexible self-serve capabilities, and is now exploiting its acquisition by ecovium, with net-new WMS customers and some ecovium replacements in territories where it previously had no presence. Generix Group is notable for its model-driven architecture, which enables more user adaptability of the WMS during and after implementation.

Vendors that make it into the **Challengers** quadrant are typically mature, functionally solid and proven, with strong track records of customer adoption and successful deployments, but lack the characteristics of **Visionaries**. Their solutions can scale to support Level 3 or higher warehouse operations, and they have strong core WMS capabilities and some extended WMS capabilities. Although offerings in the Challengers quadrant are normally functionally robust, the vendor or specific solution is not at the forefront of innovation. The vendor is not typically a WMS market or thought leader or the early provider of innovation. These vendors might have one (or more than one) strong product, but their overall market position has not yet advanced far enough to move into the Leaders quadrant. EPG and Tecsys, new entrants to this quadrant in 2022, remain in the Challengers quadrant this year. Microsoft, a new entrant to the WMS Magic Quadrant in 2023, due to reaching megavendor inclusion criteria, enhances its position in this quadrant with continued suite-based customer growth, the launch of its warehouse-only mode, and suite focus on technologies supporting WMS. EPG's continued growth, vision for extended capabilities, such as workforce management and support for automation, has further improved its position in this quadrant. Tecsys' continued revenue growth and adaptability have solidified its position in the Challengers quadrant. Tecsys is also notable for its healthcare capabilities and collaborative partnerships in this industry. Microsoft's position is driven largely by its continued customer growth following its purchase and additional development of greater WMS functional capabilities and its vision for supporting technologies. Gartner has also observed greater demand for the Microsoft Dynamics 365 Supply Chain Management WMS solution globally.

Vendors continue to innovate with continuing focus on enhancing their systems architectures, driven by customer demand. Some, like Reply and Manhattan Associates, rewrote their primary WMSs using a microservices architecture more than five years ago. This allows continuous upgrades and extensibility in a multitenant cloud environment, offering greater potential for composability and the exploitation of other supporting technologies. This puts them ahead of others who remain on a longer path toward that goal, with some pulling back entirely from that aim. The majority of vendors are responding to the market and providing further support for automation and robotics. An example is Infios (formerly Körber), with its commercial proposition to support robotics as a service (RaaS) and continued development of its WCS offering; Softeon's focus on supporting technologies and intralogistics smart robotics; and Synergy's further development of its robotics support platform. Gartner has also seen increased focus on AI-enabled vision systems for the warehouse and yard across both enterprise and midmarket, with approximately half of the vendors in this research demonstrating pilots or live deployments in a variety of use cases.

⊕ Evidence

⊕ Evaluation Criteria Definitions