NUCLEUS
RESEARCH

Enterprise Supply Chain Planning Technology Value Matrix 2026

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The Bottom Line

The enterprise supply chain planning (SCP) market is advancing quickly as persistent volatility, geopolitical uncertainty, rising costs, and increasingly complex global networks make planning an executive-level priority. Organizations are now measured by how quickly they can detect change, understand its operational and financial impact, evaluate alternatives, and coordinate a response across the business. Vendors are answering this need with stronger orchestration, faster simulation, extensible platforms, connected data foundations, and AI embedded into practical planning workflows. Customers, however, are becoming more selective and expect explainability, industry expertise, usability, strong support, and a clear path to ROI rather than another broad technology promise. The strongest vendors will be those that prove value early, meet customers at their current level of maturity, and combine advanced technology with trusted data and core planning performance. Ultimately, market leadership will depend on who can help enterprises turn planning into a faster, more connected, and financially responsible decision system.

Market overview

Decision speed is becoming the clearest measure of enterprise planning maturity.

Enterprise SCP has become inseparable from the broader business strategy. Inflation, geopolitical conflict, trade uncertainty, supplier instability, and the growing complexity of global supply networks continue to keep supply chain decisions at the executive level. Although the specific pressures vary by industry, the underlying challenge is largely the same. Retailers are managing demand volatility and inventory imbalances across channels. Distributors are addressing inventory accuracy, shrinkage, and service pressures. Manufacturers continue to contend with supplier reliability issues, capacity constraints, extended lead times, and geopolitical exposure. In each case, a disruption in one part of the network can quickly affect procurement, production, inventory, transportation, customer service, revenue, and working capital.

The persistence of volatility has changed Nucleus' evaluation of planning maturity. Organizations can no longer be judged only by the sophistication of their forecasting tools, the scale of their transformation programs, or the number of systems they have deployed. The more meaningful measure is how quickly an organization can recognize a change, understand its operational and financial consequences, evaluate possible responses, and execute the right decision. A supplier delay, an unexpected demand shift, a capacity issue, or a trade disruption can generate dozens of downstream questions, and many organizations still require multiple teams, spreadsheets, systems, and approval cycles to determine the appropriate response.

This environment is pushing the market beyond traditional planning toward continuous orchestration. Vendors are investing in architecture and orchestration layers that connect data, decisions, and execution across the enterprise. These investments are intended to reduce the fragmentation created by siloed systems and periodic planning processes while expanding the information available to planners. Enterprise planning is increasingly combining inside-out data from ERP, inventory, production, and order systems with outside-in signals from suppliers, logistics networks, customers, markets, weather, geopolitical events, and other external sources. Vendors are also expanding their ability to ingest structured and unstructured information, creating a broader contextual foundation for optimization, simulation, and AI-driven recommendations.

Platform extensibility has consequently become a more important area of differentiation. Enterprises want planning environments that can be

configured and expanded without requiring another large customization project whenever business processes, markets, or operating models change. Vendors are responding with more composable applications, open data models, configurable workflows, developer tools, marketplaces, and low-code capabilities. The business case extends beyond technical flexibility. Extensibility can reduce implementation and maintenance costs, shorten the time required to introduce new use cases, and improve ROI by allowing customers to expand the platform without repeatedly rebuilding their planning environment.

Orchestration is connecting fragmented data, planning processes, and execution workflows.

Supply chain design and simulation are also moving closer to everyday planning. Historically, network design and large-scale scenario modeling were often treated as periodic exercises conducted during major transformation programs. Today, organizations increasingly need to test decisions before committing inventory, capital, labor, or

customer service capacity. Vendors are improving solver performance, reducing compute requirements, and embedding simulation more directly into planning workflows. This enables organizations to model a wider range of operational and financial tradeoffs, including sourcing changes, capacity investments, facility expansions, lease renewals, network consolidation, and the supply chain implications of mergers and acquisitions.

Simulation is becoming faster, more operational, and more closely tied to financial tradeoffs.

A company evaluating an acquisition, for example, may need to determine whether to retain, consolidate, relocate, or close facilities based on demand, capacity, transportation costs, labor, inventory, customer proximity, capital requirements, and expected margin. The ability to evaluate these tradeoffs quickly is becoming a practical operating capability rather than an occasional strategic exercise. It can also improve the ROI of major business decisions by identifying risks and unnecessary costs before capital is committed.

Scenario planning is therefore becoming less theoretical and more operational. Customers increasingly expect planning platforms to show not only what could happen but also what the organization should do next and the financial consequences of each action. A lower-cost sourcing decision may increase lead times and inventory requirements. A service-level improvement may require additional working capital. A facility closure may lower fixed costs but increase transportation expenses and operational risk. The strongest platforms make these relationships visible so decision-makers can compare outcomes before committing to a course of action.

Inventory optimization reflects the same shift toward broader business tradeoffs. Inventory is no longer treated solely as a safety stock or replenishment problem. Vendors are connecting inventory decisions more directly to service levels, working capital, revenue protection, tariffs, perishability, supplier risk, capacity, and demand shaping. Executives rarely fund inventory technology solely to improve a planning metric. They fund it to release cash, reduce write-offs, protect revenue, improve customer service, and limit risk. Nucleus has found that the most defensible inventory investments establish a clear relationship between planning recommendations, measurable financial outcomes, and expected ROI.

Finance continues to be pulled deeper into supply chain planning for the same reason. Planning teams are increasingly expected to show how decisions affect revenue, margin, cash flow, working capital, cost-to-serve, capital requirements, tariff exposure, and profitability. This is

changing the definition of an optimal plan. An operationally feasible plan may not be financially attractive, while the lowest-cost plan may create unacceptable service or risk exposure. Enterprise planning platforms are therefore being evaluated on their ability to balance operational constraints with financial priorities and communicate those tradeoffs in terms that executives can act upon.

Inventory decisions are increasingly evaluated through service, working capital, risk, and profitability.

The convergence of planning and execution remains another defining direction of the market. Vendors continue to connect planning with supplier collaboration, procurement, production, inventory, transportation, order management, and logistics workflows. The objective is to reduce the time between identifying a problem, deciding on a response, and carrying out that decision. This represents a move away from periodic planning cycles and batch handoffs toward more continuous decision-making. The potential ROI comes not only from planner productivity but also from preventing disruptions that would otherwise become more expensive while the organization waits for data, analysis, or approval.

Partnerships and ecosystems have also become more important as vendors recognize that no single platform controls every signal, workflow, data source, and execution system involved in enterprise planning. Vendors are building partnerships across data platforms, risk intelligence, financial planning, logistics, execution, and implementation services. These relationships can extend the context available to the planning environment and improve connectivity across the broader technology landscape. Nucleus cautions, however, that partnership announcements should not be treated as inherently valuable. Their value depends on whether they reduce integration effort, improve data access, accelerate deployment, or produce a measurable operational or financial return.

AI has received the most attention in the 2026 market, but customer expectations have become more sophisticated. Agentic AI has moved from roadmap language into product language, with nearly every enterprise planning vendor introducing some form of assistant, copilot, agent, or command center. The more credible developments extend beyond conversational access to data and support actual planning workflows, including forecast review, stockout analysis, supplier decisions, replenishment, order release, root-cause analysis, scenario creation, production scheduling, and planning-cycle coordination. These use cases demonstrate the potential for AI to reduce manual analysis, accelerate decisions, and make advanced planning capabilities accessible to a broader set of users.

Adoption remains uneven. Some enterprises are deploying vendor-native AI capabilities, while others are experimenting with third-party applications for reporting, modeling, and analytical tasks. Some organizations are using AI to enable business users to create models or generate specialized reports without extensive technical support. Others are exploring inventory agents, self-healing master data, economic order quantity recommendations, network optimization, or S&OP and S&OE decision support. At the same time, many large enterprises remain dependent on spreadsheets and fragmented processes. Enterprise size should not be confused with planning maturity, and even multibillion-dollar organizations may lack the data quality, governance, process consistency, or workforce readiness required to adopt more autonomous planning.

AI value depends on trusted data, explainability, and integration into practical planning workflows.

This makes explainability a core requirement. Planners are unlikely to trust a recommendation that they cannot understand, particularly when it affects inventory, production, customer service, or significant financial commitments. Users need to know what changed, why the system is recommending an action, which data and assumptions were used, what constraints shaped the outcome, and what tradeoffs exist. Explainability is therefore not simply a usability enhancement. It is a prerequisite for governance, adoption, accountability, and the sustained realization of ROI.

Data remains the foundation beneath every AI, optimization, and orchestration initiative. Vendors continue to invest in harmonized data models, semantic layers, knowledge graphs, real-time integration, data-quality controls, and connectivity with modern data platforms. These capabilities determine whether the planning environment has sufficient trusted, context-rich information to support reliable decisions. AI does not compensate for fragmented planning data. In many cases, it exposes it. Organizations that layer generative or agentic capabilities over inconsistent master data and disconnected workflows risk automating confusion rather than improving decision-making.

Customer selection behavior is evolving accordingly. Through end-user interviews, Nucleus has found that enterprises increasingly favor vendors with deep industry knowledge and the ability to understand the customer's operating environment during the evaluation process. Buyers want teams that can speak the language of their planners, recognize industry-specific constraints, identify which capabilities are actually relevant, and guide the organization without overselling an idealized end state. As planning platforms grow more complex, customers need vendors that can distinguish between what is possible,

what is practical, and what will deliver value at the organization's current maturity level.

Customers are prioritizing industry expertise, usability, support, and maturity-based guidance.

Customers are also becoming less responsive to AI roadmaps in isolation. Nearly every vendor now has an AI story, reducing the differentiating value of an assistant or agent announcement on its own. Buyers want to understand which use case the capability supports, who will use it, what data it requires, how recommendations are validated, what actions it can perform, how it is governed, and how quickly the organization can achieve an ROI. They remain interested in AI, but are increasingly resistant to purchasing a shiny tool without a defined business case.

Near-term investment priorities extend beyond AI alone. Enterprises continue to prioritize customer data and personalization, store-and-associate technology, demand intelligence, factory automation, advanced planning and scheduling, network optimization, master data improvement, and deeper S&OP and S&OE capabilities. The common objective is to improve the speed and quality of decisions while reducing the manual effort required to coordinate them.

Nucleus recommends that vendors move ROI validation earlier in the sales process. Enterprise customers are becoming more selective as many already operate one or more planning tools and must decide whether to expand an incumbent platform, replace it, or introduce another application. Proof-of-concept stages should establish the business problem, baseline costs and performance, expected improvement, implementation requirements, affected users, time to value, and the metrics that will determine success. Proven customer examples and industry-specific use cases are becoming more important because they demonstrate not only that the software works, but where it works, how it creates value, and what the customer must do to realize that value.

Vendors must also move beyond traditional feature-led selling and adopt a more consultative, maturity-based approach. Every customer begins from a different position in terms of data readiness, process consistency, technology architecture, governance, workforce capability, and change-management capacity. The right first step will vary significantly. Vendors that understand the customer's current environment, identify the highest-ROI starting point, and create a realistic path toward greater maturity will be better positioned to drive adoption and long-term expansion. In the current market, the customer-

vendor relationship must increasingly operate as a partnership rather than a transaction.

Vendors must prove ROI earlier and connect innovation to measurable business outcomes.

Customer education will be central to that partnership. Vendors should help buyers understand that AI in supply chain planning extends beyond generative interfaces and autonomous agents. Mathematical optimization, operations research, machine learning, probabilistic forecasting, natural-language processing, and other forms of advanced analytics remain essential components of modern planning. Operations research is not interchangeable with AI, but it forms much of the decision foundation upon which newer AI experiences are built. Customers need to understand how these technologies complement one another and which approach is appropriate for a given decision.

Finally, vendors should not allow the market's focus on AI to distract from continued investment in core functionality. Solver performance, scalability, stability, integration, data quality, user experience, implementation, and support remain critical factors in customer success. User interface complexity continues to limit productivity in parts of the market, with planners often navigating too many tabs and screens and dealing with disconnected workflows. Natural-language interaction can improve accessibility, but it should complement simpler navigation, faster workflows, and stronger underlying planning performance. Support should also not be underestimated. Customers may purchase a platform based on functionality, but their ability to achieve and expand ROI often depends on the quality of implementation, training, and ongoing vendor engagement.

The 2026 enterprise supply chain planning market is not being shaped by a single disruption, technology, or product cycle. It is being shaped by the need to create a faster, more connected, and more financially responsible decision system for the enterprise. The vendors best positioned for leadership will be those that combine trusted data, optimization, simulation, AI, extensibility, and execution with industry knowledge, usability, support, and measurable customer value. The organizations that achieve the greatest ROI will be those that treat planning maturity as an ongoing business discipline rather than a one-time software purchase.

The Nucleus Research Enterprise Supply Chain Planning Technology Value Matrix provides an assessment of the market based on how vendors deliver value to customers through the usability and functionality of their solutions (Nucleus Research x222 – Understanding the Value Matrix, December 2023). The research is intended to deliver

a relevant snapshot of the Supply Chain Planning technology market, rather than serve as an empirical ranking of the vendors. The arrows indicate each vendor's perceived momentum, which is informed through conversations with end users, recently released capabilities, features, and other areas of investment.

Blue Yonder's Cognitive Planning portfolio connects demand, supply, inventory, replenishment, IBP, and production planning within a broader planning-to-execution ecosystem.

Leaders

Leaders in the 2026 Enterprise SCP Technology Value Matrix include Blue Yonder, E2open, Infor, John Galt Solutions, Kinaxis, o9 Solutions, and RELEX Solutions.

Blue Yonder

Blue Yonder is recognized as a Leader in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities for manufacturers, distributors, and retailers through its Cognitive Planning portfolio, supporting integrated business planning, demand planning, supply planning, inventory planning, replenishment planning, and production planning and scheduling. Blue Yonder's Cognitive Planning strategy builds on its earlier Cognitive Demand Planning capabilities and was expanded in 2025 with Demand and Supply Planning and Integrated Business Planning solutions for net-new customers, while existing customers continue to transition from legacy Blue Yonder SCPO environments. The vendor supports planning use cases across retail, automotive, industrial, high-tech electronics, semiconductor, consumer goods, life sciences, logistics, and other complex supply-chain-intensive industries.

Blue Yonder's planning capabilities use Agents, real-time data, machine learning, optimization, and advanced solvers to support forecasting, scenario planning, inventory positioning, supply response, and capacity-constrained planning. Demand and Supply Planning analyzes historical sales, inventory, promotional activity, marketing signals, and external demand indicators to improve forecast quality and demand sensing. Demand and Supply Planning and Blue Yonder's broader planning tools support supply planning, manufacturing planning, allocation, replenishment, order promising, production planning, scheduling, and inventory optimization across complex networks. The platform is built on a modern microservices architecture, with Snowflake used for data management and Microsoft Azure supporting scalability, security, and access to large datasets. Blue Yonder connects SCP with its broader application ecosystem across Control Tower, Transportation Management, Warehouse Management, Workforce Management, Order Management, and Category Management. The Blue Yonder

Network extends customer collaboration across a large trading partner base, including logistics carriers and suppliers, supporting information sharing across planning and execution processes.

The vendor has expanded its AI strategy through Agentic Ops, which introduces digital teammates that use large language, quantitative, and visual models to analyze supply chain data, identify root causes of disruptions, recommend actions across planning, replenishment, and inventory management, generate scenarios and compare scenarios. Inventory Ops, part of Agentic Ops, supports scenario planning, allocation builds, and inventory position analysis through desktop, mobile, and Blue Yonder Orchestrator chatbot interfaces. Blue Yonder is also partnering with NVIDIA on an AI Model Factory using NVIDIA NeMo tools and Blue Yonder supply chain domain models to support the development and deployment of planning-specific AI capabilities.

Blue Yonder strengthened closed-loop planning and execution through a shared semantic data model, reducing latency between planning and operational workflows.

Updates in the last 12 months:

- **Agentic AI for planning.**
  Blue Yonder expanded agentic AI capabilities across its planning portfolio, including Agentic Ops, Blue Yonder Orchestrator, and domain-specific agents for inventory analysis, recommended actions, scenario creation and comparison, allocations, and replenishment settings. These updates help planners accelerate scenario development, summarize root causes, and act on recommendations through more guided workflows.

- **Retail planning AI enhancements.**
  Blue Yonder enhanced retail planning with AI-assisted allocation and replenishment insights, mobile planner visibility, explainable optimization, and agent-driven supplier ordering workflows. The updates support more responsive retail planning by helping users evaluate service, inventory, and sustainability tradeoffs in the same planning process.

- **Manufacturing planning transparency.**
  Blue Yonder advanced manufacturing planning with improved AI-driven transparency, auditability, demand and supply intelligence, and scenario-based workflows. These enhancements help manufacturers make more defensible planning decisions by improving traceability across long-term planning assumptions and operational recommendations.

- **Closed-loop planning and execution.**

Blue Yonder expanded agentic AI across its planning portfolio with Agentic Ops and the Blue Yonder Orchestrator, adding domain-specific planning agents.

Blue Yonder strengthened interoperability across planning and execution through a shared semantic data model and expanded visibility into areas such as returns, allocation, replenishment, warehouse labor, supplier ordering, and production planning. This helps reduce latency between planning and execution by connecting S&OP, S&OE, merchandise planning, and operational workflows without relying on batch-based handoffs.

- **Multi-enterprise collaborative planning.**
  Blue Yonder expanded collaborative planning capabilities across customers, suppliers, carriers, and service providers through the Blue Yonder Network. The update supports more coordinated forecasting, inventory, capacity, production planning, and transaction management across multi-tier supply chain networks.

- **Event-driven planning workflows.**
  Blue Yonder's advanced event-driven planning capabilities continuously ingest internal and external signals, detect changes such as supplier delays, demand shifts, inventory anomalies, and transportation constraints, and trigger guided workflows. This supports more proactive planning by helping users move from periodic review cycles toward near-real-time exception detection and response.

- **Composable platform architecture.**
  Blue Yonder continued to modernize its platform through microservices, modular deployment, API-based integration, and cloud infrastructure built on Microsoft and Snowflake technologies. The architecture supports more scalable planning deployments by allowing services to be independently deployed, upgraded, and connected across the platform.

- **Extensible AI and data model.**
  Blue Yonder expanded platform extensibility to support third-party AI and machine learning models and external data sources. Capabilities such as ML Studio, Mix & Match in Cognitive Planning, public APIs, and customer-controlled ingress into the semantic data model allow organizations to incorporate proprietary models and external signals without re-platforming.

- **External data ecosystem.**
  Blue Yonder continued to expand its partner and data ecosystem, including integrations with providers such as OpenWeather, project44, FourKites, and PredictHQ. These connections help

customers bring weather, transportation visibility, local events, and network signals into planning workflows for more context-aware decisions.

- **Unstructured data integration.**
  Blue Yonder advanced its roadmap for incorporating unstructured data, such as documents, images, and videos, into planning workflows. The capability is intended to support agentic AI use cases by converting multimodal information into planning-relevant insights and workflow actions.

- **MCP-enabled integration and mapping.**
  Blue Yonder began leveraging new integration approaches, including the Model Context Protocol and generative AI-supported interface mapping. These capabilities can reduce the manual effort required to map customer data models to Blue Yonder data structures and improve connectivity across enterprise systems.

- **Agent enablement framework.**
  Blue Yonder expanded its Agent Enablement Framework with tooling, development frameworks, observability, and governance capabilities for agent development. This supports more scalable agent deployment while maintaining enterprise controls around access, performance, and operational use.

- **User adoption and telemetry.**
  Blue Yonder expanded usage telemetry and in-app guidance through partnerships with Microsoft Azure and Pendo.

Blue Yonder adopted the Model Context Protocol and generative AI-supported mapping to reduce manual effort in connecting enterprise data to its platform.

E2open

E2open is recognized as a Leader in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning and orchestration capabilities for organizations across aerospace and defense, retail, software, telecommunications, apparel, automotive, consumer goods, food and beverage, high-tech, industrial manufacturing, oil and gas, pharmaceuticals, and third-party logistics. E2open's planning capabilities are delivered as part of its broader connected supply chain platform, which spans channel, planning, global trade, logistics, and supply applications through a unified user experience and process orchestration layer. The platform is supported by e2net, the vendor's n-tier partner network, which connects customers, retailers, resellers, distributors, warehouses, customs, logistics providers, co-packers, manufacturers, and suppliers across the extended supply chain.

E2open launched Connected Planning, a unified data and workflow foundation spanning demand, supply, inventory, finance, and execution.

E2open's SCP capabilities include demand sensing, demand planning, supply sensing, supply planning, multi-echelon inventory optimization, S&OP, distribution planning, allocation & order promising, and supplier collaboration. The platform supports outside-in planning by connecting downstream channel signals with upstream supplier and supply network data, enabling organizations to account for demand changes, supply volatility, shortages, and disruption risk when developing constrained plans. E2open's planning applications use demand signals, AI-based sensing, optimization, and supplier collaboration workflows to support planning automation, forecast improvement, inventory reduction, issue resolution, and alignment between planning and execution processes.

E2open rebuilt Demand Sensing on a modern Python foundation and added scenario modeling so planners can test inputs and backtest models before publishing.

E2open has also expanded its AI strategy through its Digital Assistant, which serves as a foundation for agentic AI capabilities across the platform. Its agentic AI framework includes goal-oriented orchestration, prebuilt and custom agents, decision trees, AI models, advanced solvers, and the e2open data platform and network. This framework is designed to allow users to express planning intent, have agents coordinate sub-tasks across applications, and support decisions using rules, reasoning, learned behavior, and connected network data. E2open's Snowflake connector simplifies bi-directional data ingestion/egress from/to customer Snowflake systems for accelerated deployment.

Updates in the last 12 months:

- **Connected Planning launch.**
  E2open introduced Connected Planning as a unified data and workflow foundation across demand, supply, inventory, finance, and execution planning. The update supports faster implementations, smoother upgrades, and more coordinated decision-making by reducing reconciliation between planning domains.

- **Harmony user experience.**
  E2open revamped its planning user experience with the Harmony UI, creating a more consistent interface across planning applications. This can improve adoption by reducing navigation friction and giving planners a more intuitive workflow across connected planning processes.

- **Agentic Digital Assistant.**
  E2open introduced an Agentic Digital Assistant to bring goal-oriented AI decision support into planning workflows. The assistant

enables natural language interaction, helps planners navigate exceptions, and supports E2open's broader roadmap toward autonomous supply chain planning.

E2open enhanced S&OP scenario planning so users can adjust demand, run it through supply constraints, and compare outcomes end to end.

- **Forecast value add and exception dashboards.**
  E2open added standard Forecast Value Add and exception dashboards that show MAPE, bias, and exception drilldowns in a single view. The update helps planners measure where AI-generated forecasts add value and where human judgment should be applied.

- **Embedded analytics to action.**
  E2open enhanced embedded analytics so planners can move directly from analytical review into the relevant planning view without leaving the application context. This reduces reliance on external BI tools and helps users act on exceptions more quickly.

- **Next-generation Demand Sensing.**
  E2open rebuilt Demand Sensing on a modern Python-based foundation to improve scalability, configurability, and AI model flexibility. The update supports distributed computing, enhanced planner control, and continued incorporation of new AI and machine learning techniques.

- **Demand Sensing scenario modeling.**
  E2open expanded Demand Sensing with scenario modeling, allowing planners to test new inputs, backtest models, and publish changes without IT involvement. This supports continuous forecast improvement by enabling users to evaluate the impact of additional signals before moving models into production.

- **AI and ML forecasting enhancements.**
  E2open enhanced its forecasting engine with unsupervised clustering, hybrid machine learning models, configurable feature engineering, embedded data cleansing, and transfer learning for sparse demand scenarios. These updates improve forecast performance across complex demand patterns while giving planners and data scientists more control over model behavior.

- **Supply Sensing enhancements.**
  E2open expanded Supply Sensing with deep learning that uses milestone event data to predict lead times and purchase order delays. This helps planners identify upstream supply risks earlier and build more feasible supply plans based on current supplier and logistics signals.

- **Logistics volume forecasting.**
  E2open added machine learning-based logistics volume forecasting to predict daily delivery volumes. The capability helps teams adjust routes, labor, and execution capacity based on demand uncertainty and expected shipment patterns.

- **End-to-end S&OP scenario planning.**
  E2open enhanced S&OP scenario planning so users can adjust demand plans, run them through supply constraints, and compare constrained scenarios against the baseline in a single workflow. This helps executive teams evaluate tradeoffs using plans that reflect actual supply, inventory, and capacity constraints.

- **Supply and inventory planning improvements.**
  E2open added constraint planning improvements, BOM network graph visualization, in-house inventory consumption logic, and MEIO safety stock controls. These updates help users reduce lateness, improve component visibility, prioritize existing inventory, and manage service-level targets with more precision.

- **Supplier collaboration automation.**
  E2open expanded supplier collaboration with intelligent PO change request automation, production tracking dashboards, configurable supplier milestones, and component cost comparison. These updates reduce manual procurement effort and improve visibility into supplier execution against the plan.

- **Global sourcing compliance.**
  E2open added support for EU Deforestation Regulation compliance, including commodity data collection and integration with the EU TRACES portal. The update connects sourcing compliance more directly into supplier collaboration workflows.

- **Channel demand signal improvements.**
  E2open enhanced Demand Signal Management with Walmart cloud feeds through delta sharing, AI-powered partner onboarding through Velocity Hub, Dun & Bradstreet enrichment, duplicate checks, and configurable partner submission tracking. These updates improve downstream data quality and reduce latency in point-of-sale and inventory signals feeding demand planning.

- **Planning and execution convergence.**
  E2open continued to connect planning with logistics execution and global trade compliance by incorporating freight feasibility, landed cost, customs, tariff exposure, and partner-screening considerations

E2open expanded connectivity with a bi-directional Snowflake connector, SAP S/4HANA Clean Core certification, and multi-tenant middleware to speed partner onboarding.

into broader planning workflows. This supports more executable plans by accounting for logistics and regulatory constraints earlier in the planning process.

E2open introduced a multi-tenant middleware architecture to reduce implementation effort.

- **Platform and network connectivity.**
  E2open expanded platform connectivity through a bi-directional Snowflake connector, SAP S/4HANA Clean Core certification, Confluent Kafka Connector, and real-time master data synchronization with Dun & Bradstreet. These updates improve interoperability, event-driven data flow, and data quality across enterprise and multi-enterprise planning environments.

- **Partner onboarding architecture.**
  E2open introduced a multi-tenant middleware architecture to reduce implementation effort and accelerate partner onboarding. This lowers the friction of extending connected planning and execution workflows across broader supplier, customer, and logistics networks.

Infor

Infor introduced live, embedded integration between SCP and CloudSuite M3 across more than 800 attributes, tightening planning and ERP alignment.

Infor is recognized as a Leader in the 2026 SCP Technology Value Matrix. The vendor provides supply chain planning capabilities for large and complex enterprises across industries, including food and beverage, life sciences, automotive, distribution, and manufacturing. Infor SCP supports demand forecasting, sales and operations planning, inventory optimization, supply planning, capacity management, and scheduling. These capabilities can be deployed as part of Infor's CloudSuites, enabling organizations to connect planning processes with ERP, operational, and industry-specific data models.

Infor SCP can also operate alongside adjacent Infor solutions, including Infor Nexus for multi-tier supply chain visibility and Infor Lighthouse for manufacturing execution. The platform connects demand, commercial, operational, and production data to support planning across sales, operations, inventory, and manufacturing environments. Infor also supports broader process improvement through Infor Velocity Suite, which combines process mining, robotic process automation, and generative AI to help organizations identify workflow inefficiencies, analyze process deviations, and prioritize improvement opportunities. For SCP customers, this can support greater visibility into planning-related processes and help organizations align planning decisions with operational execution.

Updates over the last 12 months

- **Embedded SCP user experience.**
  Infor advanced its Supply Chain Planning user experience with a cloud-native, embedded interface designed to better align planning workflows with core operational systems. The update can improve usability by reducing context switching and supporting more guided execution of planning across demand, supply, inventory, and scheduling processes.

- **CloudSuite integration.**
  Infor introduced live, embedded integration between SCP and several of its industry CloudSuite's, supporting more than 800 attributes across planning and ERP data. This strengthens planning accuracy and execution alignment by giving users a more detailed operational data foundation for forecasting, supply planning, and inventory decisions.

- **Machine learning forecasting enhancements.**
  Infor expanded its BEST Machine Learning capabilities for forecasting, including automated model selection, tuning, and combination. These updates can help planners improve forecast quality while reducing the manual effort required to evaluate and maintain forecasting models.

- **Inventory and policy optimization.**
  Infor added Strategic Inventory Planning capabilities focused on safety stock and policy optimization. This supports more balanced inventory decisions by helping organizations evaluate service levels, working capital, and supply variability within a more structured planning environment.

- **Exception-based planning workflows.**
  Infor enhanced forecast-by-exception and guided workflow capabilities to help users focus on the planning issues that require attention. This can improve planner productivity by reducing manual review cycles and supporting more consistent decision-making across planning teams.

- **Expanded optimization capabilities.**
  Infor's advanced end-to-end optimization across demand, supply, inventory, and scheduling, including cost and carbon optimization within supply planning. These updates can help customers evaluate tradeoffs across service, margin, cost, sustainability, and operational feasibility.

Infor introduced an attribute-based forecasting AI engine for granular demand planning, alongside a roadmap for GenAI explainability and agentic AI.

- **Process manufacturing scheduling.**
  Infor improved process scheduling capabilities for batch, tank, and packaging line environments. This strengthens support for process manufacturers that need to coordinate capacity, sequencing, changeovers, and production constraints across complex operations.

- **Attribute-based forecasting AI.**
  Infor introduced an attribute-based forecasting AI engine designed to support more granular demand planning across products, customers, regions, and other business dimensions. This can help organizations improve forecast precision in complex, multi-business environments.

- **Scalability and configuration.**
  Infor expanded SCP scalability and configuration capabilities to support global, multi-business deployments and advanced customer-specific algorithms. This improves fit for complex enterprises that require planning models tailored to industry, operating model, and data maturity.

- **AI roadmap.**
  Infor's roadmap includes GenAI-enabled explainability, agentic AI, and process mining capabilities for supply chain planning. These investments point toward more explainable, proactive, and workflow-aware planning experiences over time.

Infor's roadmap includes GenAI-enabled explainability, agentic AI, and process mining capabilities for supply chain planning.

John Galt Solutions

John Galt Solutions is recognized as a Leader in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning software for organizations across the food and beverage, consumer goods, high-tech, life sciences, industrial manufacturing, wholesale distribution, retail, apparel, and chemicals industries. Its primary offering, the Atlas Planning Platform, supports demand, inventory, and supply planning; S&OP and IBP; replenishment, transportation, and manufacturing planning; and scheduling. Atlas is built as a SaaS platform with a low-code/no-code framework, enabling organizations to configure planning workflows, connect data sources, and adapt planning models across make-to-stock, make-to-order, retail, distribution, and manufacturing environments.

Atlas Planning uses a digital supply chain twin to connect operational context across demand, inventory, supply, delivery, and scheduling processes. The platform incorporates observation data, master data,

John Galt expanded Atlas with Simultaneous Multi-Objective Optimization, allowing planners to balance competing goals such as cost, service, and sustainability in a single solve.

customer context, industry context, partner data, and additional external signals to support planning decisions across the enterprise. Atlas also integrates with customers, suppliers, ERP, MES, TMS, production planning, detailed scheduling systems, and network optimization tools, allowing organizations to coordinate planning decisions among internal and external supply chain participants. Its capabilities include scenario modeling, event management, alerts, demand sensing, policies, multi-echelon inventory optimization, and decision governance.

John Galt strengthened Atlas' risk ecosystem through integrations with Everstream Analytics, Treefera, and Prewave, adding external risk and first-mile intelligence.

John Galt has continued to expand Atlas around agentic decision intelligence, forecasting, and decision support. The platform uses AI and machine learning for ensemble forecasting, probabilistic planning, reinforcement learning, scenario analysis, and decision augmentation. Its digital supply chain twin provides the operating context for agent-based capabilities, helping users reason across planning scenarios, assess tradeoffs, and support actions tied to service, inventory, sustainability, and financial objectives. Atlas also includes a generative AI-enabled virtual assistant to support planning productivity, workflow automation, and user interaction across planning processes.

A highlight of updates in the last 12 months:

- **Enhanced multi-objective optimization.**
  John Galt Solutions expanded Atlas with Simultaneous Multi-Objective Optimization, enabling users to balance competing goals such as cost, service, capacity, waste, inventory, and carbon impact within the same planning model. The update helps planners evaluate tradeoffs more effectively across MEIO, rough-cut capacity planning, and supply planning without relying on separate single-objective scenarios.

- **Explainable AI for planning decisions.**
  John Galt enhanced Atlas' explainable AI capabilities through Galt AI, using GenAI to explain recommendations across areas such as MEIO and ensemble forecasting. The update helps users understand why inventory, forecast, or planning recommendations were generated, improving trust and supporting human-in-the-loop decision-making.

- **Agentic AI decision support.**
  John Galt introduced agentic AI capabilities into Atlas to support context-aware analysis, root cause diagnosis, and prescriptive recommendations. The capability goes beyond static exception

management by helping users identify the drivers behind forecast changes, supply imbalances, and planning risks while retaining planners' control over actions.

- **Probabilistic end-to-end planning.**
  John Galt released the second phase of end-to-end probabilistic planning to better model uncertainty across supply chain decisions. The update supports probabilistic what-if scenarios and policy recommendations, helping organizations evaluate risk and variability more directly in planning workflows.

- **Expanded risk and resilience data ecosystem.**
  John Galt strengthened its partner network through integrations with Everstream Analytics, Treefera, and Prewave, bringing additional external risk, resiliency, and first-mile intelligence into Atlas' data fabric. These partnerships support the company's Knowledge Ecosystem strategy by giving planners more context on supplier, commodity, environmental, and disruption risks.

- **Treefera first-mile intelligence partnership.**
  John Galt partnered with Treefera to incorporate spatial, temporal, and commodity-level datasets into Atlas. The integration supports more dynamic risk-based planning by helping users model sourcing exposure, first-mile disruption risk, and the potential impact of external events on supply continuity and revenue.

- **Causal AI and price elasticity modeling.**
  John Galt expanded Atlas with causal inference and price-elasticity capabilities to improve understanding of relationships among variables. These updates can strengthen demand planning by helping users evaluate how pricing, promotions, external signals, and business drivers influence demand patterns.

- **Planning and execution convergence.**
  John Galt continued to connect planning and execution through real-time visibility into shop-floor activity, production lines, orders, transportation, and shipments. This supports faster response to granular execution events and helps planners adjust plans based on current operational conditions.

- **AI-driven demand signal improvements.**
  John Galt added new product clustering and AI-driven forecast synchronization capabilities to improve the quality of demand signals. These enhancements can help planners manage demand

John Galt expanded Atlas' what-if simulation with new conditions for end-to-end scenario modeling, helping planners weigh trade-offs before committing.

patterns across related products and improve consistency across forecast inputs.

- **Enhanced what-if simulation.**
  John Galt expanded Atlas' what-if simulation capabilities, including new what-if conditions for end-to-end scenario modeling. The update helps users evaluate the operational and financial impact of planning changes across demand, supply, inventory, capacity, and execution constraints.

- **Trade promotion management enhancements.**
  John Galt improved Atlas' Trade Promotion Manager by updating performance, functionality, and user experience. These enhancements support more efficient promotion planning and analysis for organizations managing demand variability from commercial events.

- **Atlas user experience modernization.**
  John Galt continued to refine the Atlas user interface through screen modernization, relabeling, updating managers and widgets, and a refreshed color scheme. These updates improve usability by making planning workflows easier to navigate and reducing friction for end users.

- **Discrete manufacturing optimization.**
  John Galt enhanced industry-specific optimization for discrete manufacturers, including capabilities to reduce changeovers, lower finished goods inventory, and support postponement strategies within MEIO. These updates help manufacturers improve production efficiency while balancing inventory and service requirements.

- **Process manufacturing optimization.**
  John Galt expanded process-industry capabilities with optimization initiatives designed to improve machine utilization, reduce downtime, and group products by common raw materials or bulk components. The updates also enhance MEIO support for holding inventory at bulk or raw-material stages, enabling more effective planning in process manufacturing environments.

John Galt continues to enhance the Atlas user interface through screen modernization, relabeling, updating managers and widgets, and a refreshed color scheme.

Kinaxis

Kinaxis is recognized as a Leader in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning and orchestration capabilities for large enterprises across industries,

including automotive, consumer products, high-tech and electronics, retail, life sciences, aerospace and defense, and industrial manufacturing. Its primary offering, Kinaxis Maestro, supports concurrent planning across demand, supply, inventory, capacity, S&OP, IBP, production scheduling, transportation, order management, reverse logistics, and control tower use cases. Maestro's concurrent planning architecture ensures that all plans, scenarios, and downstream impacts are continuously recalculated from a common data model, enabling organizations to understand the enterprise-wide impact of changes within seconds rather than through sequential planning cycles. The platform is designed to help organizations connect planning processes across functions and evaluate the operational and financial impact of supply chain decisions in near real time. Kinaxis Maestro combines an integrated data fabric, scenario modeling, AI-assisted recommendations, and exception management capabilities to support faster planning cycles and cross-functional decision-making. The platform enables users to model constraints, compare scenarios, assess tradeoffs, and coordinate responses across planning and execution workflows.

Kinaxis introduced an Operational Orchestration framework that extends concurrent planning beyond the plan to align signals, decisions, and actions across enterprise operations.

Kinaxis has expanded Maestro's data architecture through a strategic partnership with Databricks, enabling customers to use Databricks Delta Sharing and the Data Intelligence Platform to process structured, semi-structured, and unstructured supply chain data at scale, reducing data movement and latency. This supports planning for use cases that require external, high-volume datasets, including IoT, weather, market signals, and social media data. The collaboration also gives customers the flexibility to analyze data via native Kinaxis pipelines or directly in Databricks, reducing the need to extract and transform external datasets before incorporating them into planning workflows.

Kinaxis is also advancing its AI strategy through its Multi-Agent Framework, which allows users to configure agents with natural language prompts, define agent behaviors, and control access to relevant datasets through low-code configuration. The framework is designed to improve AI explainability, governance, trust, and human control by helping users understand how forecasts, alerts, or recommendations are generated and adapt agent actions to specific business contexts.

Updates in the last 12 months:

- **Operational orchestration framework.**

Kinaxis introduced its Operational Orchestration framework, extending concurrent planning concepts beyond traditional supply chain planning to close the gap between planning and execution to coordinate decisions across broader enterprise operations. The framework is designed to continuously align signals, decisions, actions, and learnings across operational workflows, supporting faster response to disruptions and changing business conditions.

Kinaxis opened Maestro's intelligence framework to customer-developed AI and optimization models and added a Forward Deployed Engineering model to accelerate value.

- **Semantic intelligence foundation.**
  Kinaxis added semantic intelligence capabilities that establish a shared business context across supply chain data, processes, and relationships. By capturing how products, suppliers, inventory, capacity, orders, and constraints relate to one another, the platform provides AI agents and planning workflows with a consistent understanding of enterprise operations. This helps improve the relevance of recommendations, enables more context-aware automation, and supports coordinated decision-making across planning functions.

- **Maestro agent expansion.**
  Kinaxis expanded its Maestro agent capabilities, including enhanced natural-language interaction via the Worksheet Agent and broader Agent Studio functionality for creating and managing business-specific agents. These updates support more guided user experiences and allow organizations to automate targeted planning tasks within existing workflows.

- **Multi-agent orchestration.**
  Kinaxis advanced its work toward coordinated multi-agent systems, including orchestrator agents and reusable agent skills. This supports more complex planning workflows in which multiple agents can collaborate to analyze issues, recommend actions, and coordinate decisions across supply chain functions.

- **Advanced Solver Studio.**
  Kinaxis introduced Maestro Advanced Solver Studio, enabling customers and partners to extend decision logic with their own heuristic, optimization, machine learning, and analytical models. This strengthens platform extensibility and allows organizations to tailor planning intelligence to specific operational constraints and business requirements.

- **Open and composable architecture.**

Kinaxis expanded Maestro's open intelligence framework to support customer-developed AI, machine learning, and optimization capabilities. The update improves flexibility by allowing organizations to compose interoperable planning components and incorporate proprietary intelligence into the Kinaxis environment.

Kinaxis Maestro recalculates every plan, scenario, and downstream impact from a common data model, revealing the enterprise-wide effect of change within seconds.

- **Forward Deployed Engineering model.** Kinaxis introduced a Forward Deployed Engineering engagement model focused on co-building customer-specific, AI-powered operational solutions. This approach can help customers accelerate time to value by combining Kinaxis platform capabilities with tailored engineering support for high-priority planning and orchestration use cases.

o9 Solutions

o9 Solutions is recognized as a Leader in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities through its Digital Brain platform, supporting enterprise organizations across discrete manufacturing, process manufacturing, distribution, and retail. o9 Solutions supports industries including high tech and consumer electronics, industrial manufacturing, automotive, consumer durables, medical devices, aftermarket, consumer products, food and beverage, paper and packaging, metals, oil and gas, pharmaceuticals, telecommunications, retail, wholesale distribution, fashion, and apparel. These industries are supported through configurable industry templates built on top of o9 Solutions' core planning functionality.

o9 Solutions' SCP capabilities span long-range strategic planning, financial planning and budgeting, integrated business planning, demand planning, demand adjustment, supply planning, master planning, operational planning, production scheduling, advanced MRP, supplier relationship management, integrated order promising, transportation load building, multi-echelon inventory optimization, and segmentation and analytics. The platform is built around a data and knowledge foundation, including the o9 Solutions Enterprise Knowledge Graph, which creates a digital representation of the business across demand, supply, inventory, capacity, financial, and operational relationships. This supports scenario modeling, plan-versus-actual analysis, constraint evaluation, and cross-functional planning decisions across daily, weekly, monthly, and annual planning horizons.

At aim10x Europe 2026, o9 Solutions outlined APEX, a framework for continuous decision improvement that helps organizations understand what happened, why, and what to do next.

o9 Solutions has continued to advance its platform toward a more touchless planning model. Its next-generation touchless demand planning approach combines AI/ML forecasting, governance, real-time data from the Enterprise Knowledge Graph, agentic AI, collaboration, and automation to reduce manual planning effort while preserving planner oversight. o9 Solutions extends this touchless planning model to supply planning, where the platform evaluates constraints, recommends actions, and synchronizes planning decisions across the network. The vendor's APEX framework extends this direction by organizing capabilities across integrated planning solutions, automated decisioning, performance post-game analysis, innovation tooling, Enterprise Knowledge Graph solutions, and an AI agent hub.

o9 Solutions expanded its Enterprise Knowledge Graph with a neurosymbolic approach and highlighted business simulators that let organizations test decisions before implementing them.

o9 Solutions' AI strategy is centered on embedding generative AI, knowledge assistants, and agentic workflows into the Enterprise Knowledge Graph to support planning explainability, root-cause analysis, and decision orchestration. The vendor's Post Game Analyzer (PGA) is designed to evaluate planning performance after each cycle by identifying root causes, surfacing value leakage, recommending policy changes, and highlighting execution or process gaps that affect outcomes. Initial use cases include excess-inventory analysis, service-level exception analysis, and forecast-accuracy analysis. o9 Solutions has also introduced agent-supported workflows, including Agent DAx for demand assumptions, NPI Navigator for new product introduction planning, SRA Agent for history and forecast realignment, and Quick Assortment Agent for combination creation and assortment-related planning. Together, these capabilities support o9 Solutions' broader direction of using the Enterprise Knowledge Graph, APEX framework, and packaged agents to help organizations move from periodic planning review toward continuous performance diagnosis, governed recommendations, and faster cross-functional decision-making.

Updates in the last 12 months:

- **APEX framework.**
  o9 Solutions outlined APEX as a framework for continuous decision improvement, helping organizations understand what happened, why it happened, what is likely to happen next, and what actions should be taken. Scheduled for general availability in September 2026, APEX builds on o9 Solutions's Digital Brain and Enterprise Knowledge Graph to help customers move from planning visibility toward more consistent business action.

- **Neurosymbolic Agentic AI Framework.**

o9 Solutions expanded its AI roadmap to include planning agents for the master planner, deployment planner, and inventory, along with forecasting and data-quality enhancements.

o9 Solutions expanded its Enterprise Knowledge Graph strategy with a neurosymbolic approach that combines AI-driven pattern recognition with structured business rules, constraints, relationships, and institutional knowledge. This grounds AI-supported recommendations in the enterprise context, helping users evaluate how disruptions, demand changes, supply risks, tariffs, or capacity constraints affect operations, inventory, procurement, service levels, and financial outcomes.

- **Post-Game Analyzer and continuous performance analysis.**
  o9 Solutions introduced the Post-Game Analyzer as an APEX capability for evaluating gaps between expected and actual planning outcomes. The capability helps organizations identify root causes, analyze value leakage, and create feedback loops across daily execution, weekly planning cycles, and monthly performance reviews.

- **Business simulators.**
  o9 Solutions highlighted its business simulation capabilities, which allow organizations to test potential decisions before implementing them in live operations. These simulators help users evaluate scenarios related to tariffs, supplier disruptions, network design, capacity, sustainability, inventory, and market changes using the enterprise context maintained in the platform.

- **Customer enablement and industry templates.**
  o9 Solutions continued to invest in industry-specific planning templates, proof-of-value initiatives, and self-sustaining Centers of Excellence. These efforts support faster time to value by helping customers validate measurable outcomes, scale internal expertise, and align planning models with industry-specific operating requirements.

- **Demand planning agentic AI.**
  o9 Solutions expanded agentic AI across demand planning workflows, including smart realignment, demand assumptions, post-game analysis, quick assortment, NPI forecasting, and risks and opportunities. These updates help planners automate analysis around forecast changes, demand assumptions, new product planning, and exception evaluation.

- **Consensus 360 and demand automation.**
  o9 Solutions introduced Consensus 360 as an all-in-one interface to automate consensus generation and added demand automation

enhancements for touchless, recommendation-based tasks. These capabilities can reduce manual alignment work and support faster movement from demand insights to planning actions.

- **Forecasting and data intelligence enhancements.** o9 Solutions enhanced statistical and machine learning forecasting with unified data insights, data quality checks, improved disaggregation parameterization, driver analysis, right-level forecasting, and advanced attach-rate forecasting. These updates help planners improve the explainability, granularity, and accuracy of forecasts across demand-planning hierarchies.

- **Integrated business planning updates.** o9 Solutions added integrated inputs for revenue growth management and agentic AI to capture risks and opportunities within IBP workflows. These updates help connect demand, commercial, and financial planning assumptions more directly into broader business planning decisions.

- **Planning agent roadmap.** o9 Solutions expanded its AI enablement roadmap to include planning agents for the master planner, deployment planner, inventory planner, and supply planner workflows. These agents support plan summarization, plan analysis, capacity analysis, material analysis, inventory analysis, and constraint resolution.

- **Implementation agent roadmap.** o9 Solutions added implementation agents focused on build-agent workflows, demand prioritization, attribute-based data maintenance, and EKG model agents for network, capacity, and inventory models. These updates are intended to accelerate configuration, model maintenance, and implementation support across planning deployments.

o9 Solutions added integrated inputs for revenue growth management and agentic AI to capture risks and opportunities within IBP workflows.

RELEX Solutions

RELEX Solutions is recognized as a Leader in the 2026 SCP Technology Value Matrix. The vendor provides a unified supply chain and retail planning platform for mid-sized to large enterprises across retail, wholesale, distribution, consumer packaged goods, and manufacturing. RELEX supports industries including grocery, convenience, electronics, home furnishings, automotive, pharmaceuticals, building and construction, fresh food production, food and beverage, health and beauty, and home and living. The platform brings together demand, supply, production, distribution, inventory, and replenishment planning

RELEX expanded its composable architecture with RELEX Open, adding plug-ins that enable teams, partners, and customers to extend the platform.

within a single environment, enabling organizations to coordinate planning decisions across suppliers, manufacturing operations, distribution networks, stores, and end customers.

RELEX advanced Rebot as a gateway for agentic planning workflows and introduced Iris, a basket-trained foundation model for demand forecasting.

RELEX's SCP capabilities include demand planning and sensing, integrated business planning, purchase planning, production planning and scheduling, distribution planning, inventory planning, retail connected planning, supplier collaboration, replenishment, merchandising planning, pricing and promotions, and space and assortment planning. For manufacturing and food and beverage organizations, RELEX supports use cases such as manufacturing order proposals, demand and supply balancing, rough-cut capacity planning, reverse BOM and recipe optimization, shelf-life and expiry management, minute-level production scheduling, and changeover planning. The vendor has also expanded its production planning and supply chain optimization capabilities, including daily production planning, optimization, and production scheduling for complex food and beverage and manufacturing environments.

RELEX is built on a cloud-native, modular, and extensible platform designed to support planning across enterprise systems, including ERP, MES, CRM, SRM, PLM, and data lakes. The platform uses machine learning, optimization, digital twin modeling, and business rules to support forecasting, scenario analysis, replenishment, and operational planning workflows. RELEX Rebot, the vendor's large language model-based assistant, introduces generative and agentic AI capabilities into the platform, while RELEX's broader AI architecture includes specialized AI for forecasting and optimization, configurable agents, plug-ins, and reusable skills. The platform's configurable architecture is intended to support expansion across planning domains while allowing customers to adapt workflows, data models, and user experiences to industry-specific requirements.

Product updates over the last 12 months:

- **RELEX Open extensibility.**
  RELEX expanded its composable platform architecture through RELEX Open, including Plug-ins that allow teams, partners, and customers to build new functionality directly on the RELEX platform. The update supports faster customization by extending data models, workflows, and user interface components without requiring lengthy development cycles.

- **Embedded AI assistant and agentic workflows.**

RELEX moved toward always-on, event-driven IBP, acquired fresh-replenishment provider Ida, and added a plug-and-play connector for SAP S/4HANA and ECC.

RELEX advanced Rebot, its embedded AI assistant, as a gateway for agentic planning workflows within the platform. The capability enables users to access AI agents, automate multi-step tasks, and orchestrate planning actions without leaving the core planning environment.

- **Reusable AI skills.**
  RELEX introduced reusable Skills that extend Rebot's ability to answer business questions, perform analysis, and trigger actions across planning workflows. These capabilities can be combined with the Business Rules Engine to give customers more control over assisted, semi-autonomous, or autonomous planning decisions.

- **AI-assisted diagnostics.**
  RELEX enhanced its Diagnostics capabilities with AI-assisted root-cause analysis and prioritized recommendations for issues such as stockouts, spoilage, and excess inventory. The update can help users accelerate issue resolution and improve planning responsiveness across retail and manufacturing environments.

- **Iris forecasting foundation model.**
  RELEX introduced Iris, a basket-trained foundation model for demand forecasting that accounts for product substitution and complementarity patterns. This strengthens demand planning by helping organizations better understand product relationships and improve forecast accuracy across complex assortments.

- **Stress-testing for S&OP and IBP.**
  RELEX introduced a Stress-Testing Agent to simplify scenario creation in S&OP and IBP planning. The capability helps users evaluate risk and opportunity across demand, supply, capacity, and cost drivers with less manual scenario modeling.

- **True Inventory enhancements.**
  RELEX continued to expand its machine-learning-based inventory-accuracy capabilities, including anomaly detection, automated balance correction, and POS-derived inventory records for environments without perpetual inventory. These enhancements can improve replenishment accuracy and reduce inventory-related planning errors across stores and distribution centers.

- **Always-on IBP development.**
  RELEX continued to move toward event-driven planning, in which operational plans can adjust continuously as material changes occur. This supports a shift from calendar-based S&OP cycles

toward more responsive decision-making supported by AI agents and pre-populated planning scenarios.

RELEX acquired Ida, a French SaaS provider focused on AI-driven fresh replenishment and store ordering for loose and perishable products.

- **Ida acquisition.**
  RELEX acquired Ida, a French SaaS provider focused on AI-driven fresh replenishment and store ordering for loose and perishable products. The acquisition expands RELEX's store-level fresh planning capabilities and strengthens its ability to support shrink reduction and product availability across high-velocity perishable categories.

- **SAP integration.**
  RELEX introduced a plug-and-play connector for SAP S/4HANA and ECC environments. The connector can reduce integration complexity for manufacturers running SAP systems and support faster time to value for RELEX deployments.

- **Macroeconomic intelligence integration.**
  RELEX partnered with Indicio to bring external macroeconomic forecasting signals into the demand planning environment through its plug-in framework. The integration enables planners to incorporate factors such as consumer confidence, inflation, and pricing indices into demand models and planning decisions.

- **Network visualization and scheduling views.**
  RELEX added graph-based visualization capabilities for complex BOM structures, including order pegging, color-coded nodes, and root-cause traceability. It also integrated production scheduling views into master planning, giving planners a more connected view from capacity planning to line-level execution.

- **Manufacturing customer advisory board.**
  RELEX launched a dedicated Manufacturing Customer Advisory Board as its manufacturing customer base expanded. The group gives manufacturing supply chain leaders a formal channel to provide feedback and help shape RELEX's product direction across manufacturing planning use cases.

- **Infios execution partnership.**
  RELEX partnered with Infios to connect its supply chain planning capabilities with Infios' supply chain execution portfolio across WMS, OMS, and TMS. The partnership can help customers better align planning decisions with warehouse, order, and transportation execution, supporting stronger continuity from forecast and replenishment planning through fulfillment.

Experts

Experts in the 2026 Enterprise SCP Technology Value Matrix include Dassault Systèmes, ICRON, OMP, Oracle, SAP, and ToolsGroup.

Dassault Systèmes

Dassault Systèmes is recognized as an Expert in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities through DELMIA Supply Chain Planning and Optimization, which is delivered within the broader 3DEXPERIENCE platform. Dassault Systèmes supports organizations across aerospace and defense, transportation, marine, high-tech, consumer packaged goods, healthcare, construction, home equipment, and other complex manufacturing and logistics-intensive industries. DELMIA SCPO provides capabilities for demand planning, demand sensing, supply planning, procurement planning, scenario modeling, inventory optimization, master production scheduling, advanced planning and scheduling, and integrated business planning.

Dassault Systèmes' DELMIA SCPO, supported by DELMIA Quintiq optimization technology, gives manufacturers and logistics-intensive organizations tools to model constraints, evaluate scenarios, and optimize planning and scheduling decisions across complex operational networks.

Dassault Systèmes delivers its SCP capabilities through DELMIA Supply Chain Planning and Optimization, supported by the DELMIA Quintiq planning and optimization technology within the broader 3DEXPERIENCE platform. DELMIA Quintiq provides the optimization, constraint modeling, and planning logic used to support complex scheduling, resource allocation, and network planning decisions, while DELMIA SCPO organizes these capabilities into supply chain planning workflows across demand, supply, production, logistics, and workforce planning. The solution supports network optimization, logistics planning, sales and operations planning, production planning, advanced scheduling, rail planning, and workforce scheduling. This structure enables organizations to model operational constraints, synchronize production and supply decisions, evaluate scenarios, and optimize resource use across complex manufacturing and logistics networks.

Dassault Systèmes' AI messaging is currently broader than SCP and is largely positioned around Industrial AI use cases across manufacturing and operations. These include manufacturing defect detection, worker support, scheduling optimization, and equipment detection and identification. Within SCP, the most relevant AI-enabled capabilities are tied to optimization, simulation, scenario evaluation, and scheduling support. Dassault Systèmes will need to continue expanding and clarifying its SCP-specific AI messaging to better differentiate how

Industrial AI supports planning workflows, planner productivity, and decision orchestration within DELMIA SCPO.

ICRON

ICRON provides supply chain planning and decision-optimization software on a unified data model for organizations managing complex, interdependent operations.

ICRON is recognized as an Expert in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning and decision optimization software for organizations managing complex planning environments with high numbers of constraints, variables, and interdependent decisions. ICRON supports industries including FMCG, consumer packaged goods, building materials, high-tech, machinery, chemicals, biotechnology and pharmaceuticals, medical devices and equipment, automotive suppliers, automotive and rail OEMs, aerospace and defense, aviation, field service, retail, healthcare, and hospitality. Its platform is designed to help organizations model demand, orders, inventory, procurement, production and capacity, scheduling, finance and budget, S&OP, and network design within a connected planning environment.

ICRON's platform is built around a digital supply chain and customer behavior model that incorporates global pegging, algorithms, constraints, and risk to support planning decisions across operational and strategic processes. Core capabilities include demand planning, order promising, capacity planning, production scheduling, replenishment, material supply planning, multi-echelon inventory optimization, S&OP, and network design. The platform is particularly suited for organizations that need to evaluate competing objectives across service, cost, capacity, procurement, inventory, and production while accounting for real-world constraints such as material availability, resource capacity, sequencing, lead times, and customer commitments.

ICRON also supports scenario modeling and decision automation through AI agents and a Microsoft 365-integrated co-pilot agent. Its business agents support domain-specific planning decisions across areas such as demand planning and supply planning, while generic agents support tasks such as coding, reporting, knowledge queries, UI generation, and API generation. The co-pilot interface enables users to create and adjust business scenarios using natural language prompts, such as increasing demand forecasts, changing plant resource capacities, composing new demand and supply scenarios, and optimizing revised supply plans. This supports ICRON's broader focus on helping planners analyze complex tradeoffs and coordinate decision processes across planning functions.

Product updates over the last 12 months:

ICRON deployed LLM-powered planning agents and Copilot-integrated assistants and added digital-twin modeling for liquid manufacturing scheduling.

- **Cloud-ready platform architecture.**
  ICRON introduced a decoupled microservices architecture with asynchronous message-broker communication, distributed orchestration of planning workloads, and micro-frontend user interface design. The update improves scalability, reliability, and release flexibility by allowing platform components to be updated and scaled more independently.

- **High availability and mobile planning.**
  ICRON enhanced its mobile applications with high-availability capabilities, real-time push notifications, and improved disaster recovery. These updates support more continuous planning operations and help users respond to disruptions or workflow changes from mobile environments.

- **Generative AI and Copilot integration.**
  ICRON deployed LLM-powered planning agents and Copilot-integrated assistants to support conversational interaction, contextual recommendations, and automated planning actions. The update can improve usability by helping planners navigate daily workflows, interpret scenarios, and act on recommendations with less manual effort.

- **Liquid manufacturing scheduling.**
  ICRON expanded its process-industry capabilities with advanced liquid-flow scheduling and digital-twin modeling for liquid manufacturing environments. The update supports more accurate modeling of tanks, lines, transfers, sequencing, cleaning cycles, and bottlenecks across food and beverage and other liquid-based production settings.

- **Planning workflow visibility.**
  ICRON added workflow visualization, tracking, enhanced logging, monitoring services, and improved geospatial map functions. These updates provide planners with clearer process visibility, faster troubleshooting, and stronger network analysis across complex planning environments.

- **Cost-to-serve simulation.**
  ICRON embedded cost-to-serve simulation and deeper financial visibility into tactical and operational planning workflows. This enables users to evaluate service, profitability, and cost tradeoffs when making planning and execution decisions.

- **Discrete manufacturing scheduling.**

ICRON enhanced scheduling algorithms for complex assembly operations, including sequencing, multi-level assembly coordination, and shared-resource management. These improvements strengthen support for discrete manufacturers who manage complex production dependencies and resource constraints.

OMP's Unison Planning embeds scenario simulation and explainable AI to model complex, constraint-heavy supply chains before committing to a plan.

OMP

OMP is recognized as an Expert in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities through OMP Unison Planning, a cloud-based platform built on Microsoft Azure for organizations operating complex manufacturing and distribution networks. OMP supports industries including chemicals, consumer goods, life sciences, metals, paper, plastics and packaging, building products, and tires. Its core planning capabilities span network design, S&OP, demand management, operational planning, and scheduling, enabling organizations to connect strategic, tactical, and operational planning decisions across the supply chain.

Unison Planning is designed as a configurable platform for companies with industry-specific planning requirements, complex constraints, and interdependent planning decisions. The platform includes value-enhancing capabilities across collaboration, simulation management, analytics through 360 Control, allocation and promising, inventory optimization, solvers, machine learning, user experience, and explainable AI. These capabilities support use cases such as forecast consumption, material allocation, order promising, pegging, safety stock management, scenario simulation, value optimization, and industry-specific solving. OMP also offers Unison Express, a ready-to-deploy planning solution that provides standardized, industry-specific best practices for organizations seeking faster deployment compared with the fully configurable Unison Planning platform.

OMP has continued to evolve its platform toward decision-centric planning through UnisonIQ, its AI and decision intelligence offering. UnisonIQ includes always-on agents for areas such as supply planning, modeling, demand planning, and data management, as well as Unison Companion, the vendor's generative AI assistant and orchestrator. The offering also incorporates AI engines that combine machine learning, optimization, and explainable AI to support planning recommendations and decision evaluation. This direction reflects OMP's shift from fixed planning cycles and reactive exception management toward more adaptive planning workflows, enterprise-wide orchestration, and human-plus-AI decision support.

Oracle

Oracle delivers planning through Oracle Fusion Cloud Supply Chain Planning, spanning demand, supply, replenishment, S&OP, and production within its Fusion suite.

Oracle is recognized as an Expert in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities via Oracle Fusion Cloud Supply Chain Planning, part of the broader Oracle Fusion Cloud Supply Chain & Manufacturing suite. Oracle supports organizations across industries, including automotive, communications, consumer goods, federal government, healthcare, high tech, life sciences, industrial manufacturing, oil and gas, restaurants, retail, transportation, and wholesale distribution. Its core SCP capabilities include demand management, supply planning, sales and operations planning, and supply chain collaboration.

Oracle Fusion Cloud Supply Chain Planning is supported by adjacent capabilities across inventory management, manufacturing, maintenance, order management, product lifecycle management, procurement, Fusion Data Intelligence, and sustainability. These applications are hosted on Oracle Cloud Infrastructure and are designed to connect planning processes with operational, financial, product, procurement, and execution data across the enterprise. Within SCP, Oracle enables organizations to coordinate demand, supply, inventory, capacity, and collaboration workflows while leveraging the broader Fusion application suite to support planning decisions across manufacturing, procurement, order fulfillment, and supplier ecosystems.

Oracle has also expanded its AI strategy across Fusion applications through AI Agent Studio and the introduction of agentic applications. Within SCP, Oracle's generative and agentic AI capabilities include a planning stockout advisor, a planning data quality agent, a supply chain collaboration policy advisor, a planning process advisor, a planning advisor for exceptions, a planning advisor for notes, a planning order release assistant, a planning measure expressions assistant, and a planning cycle assistant. These capabilities are intended to support planner productivity, exception management, data quality review, policy guidance, and planning process execution while keeping planning decisions connected to the broader Fusion Cloud application environment.

Recent product updates:

- **AI agents across planning workflows.**
  Oracle expanded AI agent capabilities across Supply Chain Planning, including the Planning Advisor for Notes, Planning Advisor for Exceptions, Planning Measure Expression Assistant,

Planning Order Release Assistant, Planning Stockout Advisor, Planning Cycle Assistant, Inventory Optimization Advisor, Configuration Advisor, and B2B Message Converter. These updates support more guided planning and collaboration workflows by helping users interpret planning context, analyze exceptions, build measure logic, evaluate stockout risk, release orders, manage planning cycles, and process B2B messages with more contextual assistance.

Oracle expanded AI agents across Supply Chain Planning, including Planning Advisors, and continued migrating demand, supply, and S&OP into its Redwood experience.

- **Redwood planning user experience.**
  Oracle continued migrating demand, supply, replenishment, S&OP, and collaboration capabilities into Redwood. Updates included new or enhanced Redwood pages for forecasting profiles, measures, product launches, simulation sets, exceptions, supply network models, planning cycles, bills of resources, sourcing rules, suppliers, planning data security, collaboration messaging, and supply chain orchestration.

- **Demand planning and forecast intelligence.**
  Oracle enhanced Demand Management with expanded forecasting scale, improved hyperparameter tuning performance, product family planning percentages, demand simulation details, global forecasting across different units of measure, and additional forecasting profile capabilities. These updates help customers manage more complex demand planning environments while improving forecast configuration, scalability, and analysis.

- **Planning data management and administration.**
  Oracle improved planning data workflows with targeted source data collections by organization group, advanced search, wildcard search, collected measure review, flat file loading, macro-free pivot table imports, plan data exports, and Oracle Object Storage support for scheduled extracts. These updates reduce administrative friction and improve the speed and consistency of data collection, review, and analysis across planning processes.

- **Measure and model configuration.**
  Oracle expanded configuration capabilities for measures, measure groups, measure catalogs, expression building, measure context, dimension catalogs, levels and attributes, planning level profiles, item attributes, planning attributes, and item relationships. These updates give planners and administrators more control over planning model design, measure logic, and analytical structures across demand, supply, and S&OP workflows.

- **Exception analysis and planning visibility.**
  Oracle added new capabilities for exception configuration, exception analysis, plan message purging, plan comparisons against archived versions, waterfall and trend analyses, stacked visualizations, contextual deep links, and links to AI agents. These updates improve planner visibility by making exceptions, historical changes, supporting context, and AI assistance easier to access within planning workflows.

- **Simulation and scenario planning.**
  Oracle expanded simulation capabilities across demand, supply, replenishment, and S&OP, including support for adding items, resources, item structures, and work definitions to simulation sets. These updates help planners test changes in supply, demand, inventory, and resources before applying them to operational plans.

- **S&OP planning-cycle management.**
  Oracle enhanced S&OP with Redwood capabilities to manage planning cycles, build plans, create bills of resources, support product launches, collect measure data, handle exceptions, and send FYI notifications. These updates support more structured S&OP execution by improving visibility, coordination, and usability across recurring planning cycles.

- **Inventory optimization and replenishment alignment.**
  Oracle expanded inventory optimization and replenishment capabilities with multi-echelon inventory optimization, time-phased safety stock smoothing, safety stock integration into S&OP and Supply Planning, replenishment policy simulation, warehouse capacity utilization monitoring, fair-share allocation for scarce supply, and lead time insights from Planning Advisor. These updates help organizations better align their inventory policies, service levels, replenishment decisions, and constrained-supply plans.

- **Supply planning AI and order release.**
  Oracle enhanced Supply Planning with AI-assisted exception analysis, measure expression support, and order release assistance, including batch processing and root-cause analysis for order release decisions. These updates help planners identify supply issues, evaluate order actions, and manage release decisions with more guidance.

- **Supply and demand analysis.**

Oracle expanded simulation across demand, supply, replenishment, and S&OP, and added multi-echelon inventory optimization with time-phased safety-stock smoothing.

Oracle strengthened process manufacturing with formula-based supply planning and expanded production scheduling for flow manufacturing lines.

Oracle expanded supply-demand visibility with Redwood Gantt analysis, order comparisons, build plan analysis, pegging analysis, demand fulfillment workflows, deep links for supply and demand, saved filters, and contextual visualizations. These capabilities help planners better understand constraints, supply-demand relationships, and plan changes across the supply network.

- **Process manufacturing planning.**
  Oracle strengthened process manufacturing support with formula-based supply planning, operational yields, calculated batch quantities, formula output validity dates, repeated components, materials that are both ingredients and outputs, and outputs of the same item generated multiple times in a process. These updates improve planning accuracy for manufacturers managing batch logic, formulas, co-products, and complex production dependencies.

- **Production scheduling enhancements.**
  Oracle expanded production scheduling with support for flow manufacturing production lines, sequencing rules, work order header attributes, production line calendars, parallel operations, repeat ingredients, item lead time as an optional constraint, under-completion tolerance, and pegging data visibility. These updates help manufacturers create more executable schedules that reflect line-level constraints and production realities.

- **Backlog and fulfillment management.**
  Oracle enhanced Backlog Management with Redwood capabilities for planning rules, sourcing rules, bills of distribution, supply allocation rules, scheduling delay diagnosis, planning attributes, deep links, and wildcard search. Additional updates support sales order rescheduling for flow-manufacturing items, planned-date overrides for reserved order lines, and PTO kit scheduling at any level within a PTO model configuration.

- **Unit-of-measure and forecast consumption updates.**
  Oracle improved planning support for alternate units of measure, principal UOM views, lot-specific UOM conversions, global forecasting across different UOMs, and forecast consumption review. These updates help customers manage more accurate planning outputs across products, organizations, and supply networks with varied unit structures.

- **Supply Chain Orchestration integration.**

Oracle expanded Supply Chain Orchestration with direct integrations to inventory and manufacturing and added AI-assisted B2B collaboration messaging.

Oracle expanded Supply Chain Orchestration with direct integrations to inventory and manufacturing, REST-based transfer order and work order capabilities, alternative UOM purchase orders, early arrival notifications for back-to-back supply, contract manufacturing support for process manufacturing, and Redwood experiences for purchase orders, work orders, transfer order lines, and the orchestration landing page. These updates help connect planning outputs more directly to downstream execution processes.

- **Collaboration messaging AI and automation.**
  Oracle enhanced collaboration messaging with AI-assisted B2B message conversion and processing, support for additional document types, outbound message converter services, and workflow improvements for upload and download capabilities. These updates help automate message interpretation, conversion, and partner communication across supplier and customer collaboration workflows.

- **Redwood collaboration administration.**
  Oracle moved more collaboration messaging setup and monitoring into Redwood, including B2B message history, collaboration messaging configuration, processing rules, inbound message overrides, B2B certificates, supplier and customer messaging setup, Brazil tax authority messaging, and redesigned collaboration messaging landing pages. These updates improve usability and administrative consistency for trading partner messaging.

- **Partner connectivity and message governance.**
  Oracle added capabilities for OAuth 2.0 authorization, B2B certificate management, B2B cross-reference management, customer setup simplification, location code migration, bulk retransmission of unsuccessful purchase orders, expired message file purging, and import/export of messaging setup data. These updates strengthen partner connectivity, security, recovery, and governance across collaboration messaging.

- **Demand and order collaboration.**
  Oracle enhanced collaboration capabilities for publishing demand collaboration data, managing published order forecasts, receiving orders from Oracle CPQ, reporting sales order import errors, and including user-defined shipment attributes in outbound shipment notifications. These updates help customers share planning signals

and order information with partners more effectively across demand, supply, and execution workflows.

- **Configure-to-order support.** Oracle added Redwood capabilities to manage configured items and review their structures, as well as a Configuration Advisor AI agent. These updates support more guided configure-to-order workflows by improving visibility into configured item structures and assisting users with configuration-related decisions.

Oracle enhanced demand and order collaboration and added Redwood configure-to-order support with a Configuration Advisor for managing configured items.

SAP

SAP is recognized as an Expert in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities through SAP Integrated Business Planning, with adjacent planning functionality across production planning, available-to-promise processes, and supply chain planning collaboration. SAP's SCP capabilities are designed for large enterprises that need to coordinate demand, supply, inventory, production, and supplier collaboration across complex global operations. SAP IBP serves as the core planning environment, supporting sales and operations planning, forecasting and demand management, inventory planning and optimization, response and supply planning, and supply chain visibility.

SAP IBP supports real-time planning, simulation and comparison, collaboration, performance monitoring, demand planning, demand sensing, statistical forecasting, time series analysis, multilevel planning, rough-cut planning, response management, inventory optimization, network collaboration, and what-if scenario analysis. SAP's broader planning capabilities include production planning and detailed scheduling for capacity planning and production order scheduling, available-to-promise functionality for order promising and stock allocation, and supply chain planning collaboration for planning and trading partner collaboration, purchase order and inventory collaboration, manufacturing visibility, capacity collaboration, and forecast collaboration. These capabilities allow SAP customers to connect planning decisions with production, fulfillment, supplier, and trading partner workflows across the broader SAP application ecosystem.

SAP has also advanced its autonomous enterprise messaging, including autonomous supply chain management concepts highlighted around orchestration and role-based decision support. The foundation of this strategy is SAP Joule, including Joule agents and assistants, with assistants combining multiple agents to support broader workflows.

Within planning, SAP is developing assistant and agent capabilities for exception management, inventory decision allocation, component shortages, deployment order confirmation, long-term resource capacity shortage resolution, and footprint optimization. SAP also positions related assistants across product design, manufacturing, and asset and service management. Within SCP, these capabilities are best understood as agent-supported planning and orchestration tools that help users identify exceptions, evaluate actions, and coordinate decisions across SAP's planning and operational systems.

SAP introduced Vendor Managed Inventory in IBP 2605 and a harmonized planning area unifying time-series and order-based planning end-to-end.

Updates over the last 12 months:

- **Vendor Managed Inventory.**
  SAP introduced Vendor Managed Inventory in SAP IBP 2605, enabling suppliers to automate customer stock replenishment planning. The capability integrates customer demand and inventory visibility into supply planning runs, helping users maintain service levels while reducing manual monitoring and replenishment handoffs.

- **Harmonized planning area.**
  SAP introduced the harmonized planning area I_SAPIBP2 to support end-to-end planning processes across time-series and order-based data. The update provides a unified data model, centralized application mapping, unit-of-measure and currency conversion, and real-time integration with SAP ERP and SAP S/4HANA environments.

- **AI-assisted forecasting explainability.**
  SAP expanded AI-assisted forecasting insights across Planner Workspaces and the SAP IBP add-in for Microsoft Excel. These capabilities help users understand forecast results, model behavior, forecasting methods, parameter values, outlier corrections, and lifecycle logic without leaving the planning interface.

- **New product forecasting enhancements.**
  SAP enhanced new product forecasting with like-modeling logic that can incorporate independent variables such as promotion data. This helps planners generate more accurate launch forecasts by allowing new products to inherit relevant forecast inputs from predecessor products.

- **Planner Workspace usability updates.**
  SAP continued to improve Planner Workspaces with refreshed table designs, workbook variants, alert grouping, contextual navigation,

gating-factor analysis, and one-click forecast simulations. These updates help planners focus on relevant data, identify root causes faster, and test forecasts without committing changes to the active plan.

SAP added AI-assisted formula generation and Joule-supported job scheduling, and enhanced scenario management with harmonized shine-through for baseline changes.

- **AI-assisted planning productivity.**
  SAP added AI-assisted formula generation, AI-driven formatting rules, and Joule-supported job scheduling and monitoring. These updates improve usability by allowing planners to create formulas, highlight relevant data, schedule jobs, and monitor execution using natural language assistance.

- **Scenario and plan management.**
  SAP enhanced scenario management with harmonized shine-through functionality for baseline changes, now extending to orders and available in both Planner Workspaces and the SAP IBP Excel add-in. The update gives planners more control over how scenario changes flow through the planning environment.

- **Inventory optimization and MRO balancing.**
  SAP expanded inventory planning with budget analytics, time-varying service levels, and an MRO Inventory Balancing Operator. These capabilities help organizations align safety stock targets with budget constraints, adjust service goals by time horizon, and reduce obsolete or slow-moving parts through recommended inventory transfers.

- **Real-time integration and reconciliation.**
  SAP enhanced real-time integration with cross-system stock transfers and automated correction of order and stock inconsistencies in RTI reconciliation. These updates improve alignment between planning and execution systems by synchronizing stock, order, and transfer data with less manual intervention.

- **Analytics and reporting improvements.**
  SAP enhanced Analytics Stories with an optimized story experience, improved navigation, cascading filters, dynamic selections, responsive views, and Microsoft PowerPoint integration. These updates support more accessible planning analysis and visualization within SAP IBP.

- **Joule security compliance checks.**
  SAP added Joule-supported security compliance checks for SAP IBP system configuration. The capability compares actual system

settings against SAP security recommendations and provides compliance status and remediation guidance, reducing manual audit effort.

ToolsGroup

ToolsGroup is recognized as an Expert in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities for organizations across aftermarket parts, manufacturing, distribution, retail, and consumer packaged goods. Its current platform offering, Decion, supports end-to-end planning across demand, supply, inventory, replenishment, production, capacity, allocation, pricing, promotions, and merchandise financial planning. The platform is designed to help organizations connect long-term strategic planning, mid-term optimization, short-term response, and real-time sensing across planning processes.

ToolsGroup's SCP capabilities include demand forecasting and planning, demand sensing, inventory optimization, replenishment, production and capacity planning, S&OP, scenario planning, digital supply chain twin capabilities, allocation and replenishment, assortment planning, merchandise financial planning, and in-season inventory optimization. The platform also includes retail and consumer goods planning capabilities, such as price, promo, and markdown optimization, as well as inventory rebalancing through store-to-store transfers. ToolsGroup continues to emphasize probabilistic forecasting and multi-echelon inventory optimization, supporting SKU-location-level inventory decisions and helping organizations balance service levels, stock availability, inventory costs, and supply chain risk.

ToolsGroup has expanded its AI messaging around the agentic supply chain, positioning Decion as a platform to move from prediction to guided planning outcomes. Its AI capabilities support probabilistic forecasting, scenario analysis, replenishment, allocation, inventory optimization, and planning explainability. Recent AI additions include Decy, the vendor's digital assistance interface, as well as agentic alert prioritization, forecast explainability and inventory and stock mix explainability and simple task execution using the agent within the system. These capabilities are intended to help planners understand why recommendations are generated, evaluate alternative actions, and coordinate decisions across demand, supply, assortment, pricing, fulfillment, and inventory workflows.

Updates over the last 12 months:

ToolsGroup's Decion platform connects long-term planning, mid-term optimization, short-term response, and real-time sensing across demand, supply, inventory, replenishment, allocation, pricing, and merchandise planning.

- **Decion agentic AI platform.**
  ToolsGroup launched Decion, an agentic AI platform designed to continuously sense, decide, and act across supply chain planning workflows. The platform combines probabilistic decision intelligence, multi-objective optimization, agentic AI, and human-controlled execution guardrails to help organizations evaluate risk, recommend corrective actions, and steer planning decisions toward service, margin, inventory, and growth targets.

ToolsGroup's recent Decion launch reflects its shift from prediction-focused planning toward guided decision support, where AI, optimization, and human execution controls help steer planning outcomes.

- **Inventory-aware demand shaping.**
  ToolsGroup integrated SO99+ with PriceAI to connect demand planning, pricing, fulfillment, and supply optimization in a single planning environment. The capability enables organizations to shape demand based on available supply, evaluate pricing scenarios, and balance tradeoffs across revenue, margin, volume, inventory, and service levels.

- **Agentic planning and S&OP execution.**
  ToolsGroup expanded agentic planning capabilities with AI copilots, scenario generation, driver explanations, and recommended actions, while also advancing sales and operations execution capabilities. These updates support more continuous planning by helping users identify emerging events, quantify financial impact, rebalance plans, and move from manual parameter tuning toward more automated decision execution.

Accelerators

Accelerators in the 2026 Enterprise SCP Technology Value Matrix include Anaplan, GAINS, Logility, New Horizon Soft, and Slimstock.

Anaplan

Anaplan is recognized as an Accelerator in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities on The Anaplan Platform, which also supports finance, sales, workforce, retail, and IT planning use cases. Anaplan serves organizations across industries, including life sciences, high-tech, consumer goods, retail, industrial manufacturing, and automotive. Its supply chain planning application suite includes AI/ML forecasting engine, demand planning, inventory planning, rough-cut capacity planning, supply planning, integrated business planning, and spend analysis & forecasting. These capabilities enable organizations to connect operational and financial planning to reduce decision latency

Anaplan completed a major platform re-architecture onto a single global SaaS tenant spanning AWS, Azure, and Google Cloud.

across functions while supporting scenario modeling, consensus planning, allocation decisions, and long-range planning.

Anaplan launched its Data Orchestrator to coordinate planning data across functions and added CoModeler and role-based Analyst Agents for supply chain.

Anaplan's SCP capabilities include automatic outlier management, history correction, demand classification, product segmentation, forecast model selection, demand sensing, product lifecycle planning, campaign planning, consensus planning, DC and location planning, replenishment planning, safety stock simulation, inventory transfers, sourcing planning, BOM management, capacity analysis, constraint management, optimized material planning, work order and purchase order recommendations, constrained supply allocation, financial impact analysis, and scenario modeling. The platform's integrated business planning capabilities support portfolio review, strategic horizon planning, risk and opportunity management, action plan development, and decision communication across planning stakeholders.

Anaplan has also advanced its platform architecture with a $500M multi-year investment, including a major re-architecture to a single global SaaS tenant across AWS, Azure, and Google Cloud. This update is intended to improve scalability, performance, and resilience for large multinational customers managing complex, cross-functional planning environments. The platform now includes Anaplan Data Orchestrator as a data transformation layer that connects data warehouses, CRM, open-source databases, HRM, ERP, and other enterprise systems to Anaplan applications and customer models. Anaplan Intelligence spans the platform, with AI/ML forecasting and optimization, conversational interfaces via role-based analyst agents, autonomous agents, and Anaplan Agent Studio for custom agent development. Within SCP, these capabilities are positioned to improve forecast quality, model optimization, anomaly detection, data quality, workflow support, and planner productivity while preserving the platform’s broader connected planning model.

Updates over the last 12 months:

- **Platform re-architecture.**
  Anaplan completed a major platform re-architecture with a single global SaaS tenant across AWS, Azure, and Google Cloud. The update improves scalability, performance, and resilience for large multinational customers managing complex, cross-functional planning environments.

- **Anaplan Data Orchestrator.**

Anaplan launched the Data Orchestrator as a new data layer to share and coordinate planning data across business functions. The capability supports end-to-end planning by reducing data silos and improving visibility across supply chain, finance, sales, and operational use cases.

Anaplan continued investing in its core Demand Planning, Supply Planning, and Integrated Business Planning applications.

- **GenAI model-building capabilities.**
  Anaplan introduced CoModeler, a GenAI-powered capability that helps users build, extend, and optimize planning models through natural language prompts. This can reduce technical barriers for business users and accelerate model development across complex planning workflows.

- **Role-based analyst agents.**
  Anaplan introduced AI role-based Analyst Agents, including a Supply Chain Analyst, to help users query data, identify insights, and suggest workflows through a conversational interface. These agents improve usability by helping planners interact with large datasets and planning outputs without relying on manual analysis.

- **AI forecasting engine.**
  Anaplan launched Anaplan Forecaster, an AI forecasting engine that provides automated forecast insights and explainability. The capability helps planners understand forecast drivers and build confidence in machine-learning-generated projections for supply chain and financial planning.

- **Syrup Tech acquisition.**
  Anaplan acquired Syrup Tech to expand AI-driven retail and supply chain analytics capabilities. The acquisition enhances Anaplan's ability to support inventory, merchandising, allocation, and retail planning decisions with more advanced analytics.

- **Composable application expansion.**
  Anaplan expanded its suite of composable applications, including new offerings for Trade Promotion Management, Spend Analysis and Forecasting (for Direct Materials spend), Allocation and Replenishment, and Assortment Planning. Anaplan has also launched a partner-built application called the Commercial Supply Planning application for Biotech. These packaged applications can help customers shorten time to value by deploying preconfigured planning capabilities aligned to supply chain and retail use cases.

- **Supply chain application updates.**

Anaplan continued to invest in its core supply chain planning applications, including Demand Planning, Supply Planning, Inventory Planning, and Integrated Business Planning. These updates support broader connected planning workflows by linking operational planning decisions with financial and commercial impacts.

GAINS introduced Supplier Decision Automation to automate routine purchase order and transfer approvals, allowing planners to focus on exceptions.

GAINS

GAINS is recognized as an Accelerator in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning and decision orchestration capabilities for organizations across distribution, manufacturing, retail, and service parts/MRO environments. Its primary offering, the GAINS Decision Engineering and Orchestration platform, supports demand planning and forecasting, inventory optimization, replenishment planning, production planning, order promising, S&OP, supply chain design, and transportation strategy. The platform is designed around a composable application model that enables organizations to add planning and decision capabilities over time while supporting coordination across suppliers, customers, service providers, and internal planning teams.

GAINS DEO combines optimization, advanced heuristics, simulation, AI/ML, and scenario modeling to help organizations evaluate tradeoffs across service, inventory, cost, working capital, and revenue objectives. The platform's multi-echelon inventory optimization capabilities support inventory positioning across complex bills of material, distribution networks, and location-specific service targets. GAINS also emphasizes decision automation through its decisioning system, which includes a data foundation and signal platform, decision engines and models, intelligence and adaptation, user interaction, and orchestration workflows. This architecture is intended to make planning intelligence more visible, explainable, and actionable while preserving human decision authority for approvals, overrides, recommendations, alerts, and model governance.

GAINS has continued to evolve its platform toward a decision-centric architecture that connects planning, simulation, prediction, and performance management. The vendor has identified agent-based capabilities across data intelligence, analytics and insights, decision support, performance management, user interaction, external intelligence, and communication. GAINS also maintains a partnership with Databricks, integrating lakehouse capabilities for scalable ingestion, transformation, and federation of structured and unstructured data. This supports advanced analytics, AI model training, and broader

use of external signals within planning, design, simulation, and decision optimization workflows.

GAINS introduced Design-as-a-Service and modernized its cloud platform, strengthening the connection between network design and ongoing planning.

Updates in the last 12 months:

- **Machine learning demand prediction.**
  GAINS released Demand Prediction, a machine learning forecasting capability that works alongside its statistical forecasting engine. The update is designed to improve forecast accuracy for complex, intermittent, and new-product demand patterns where traditional models can be less reliable.

- **Lead time prediction.**
  GAINS expanded its Lead Time Prediction capabilities with machine learning-generated, self-updating lead times that replace static planning assumptions. The capability is in active rollout with customers, including AmerCareRoyal and TW Metals, and can improve planning accuracy by providing users with more up-to-date lead-time inputs for replenishment and inventory decisions.

- **Supply decision automation.**
  GAINS introduced Supply Decision Automation, co-developed with Border States, to automate routine purchase order and transfer-line approval decisions. The capability combines a decision learner with supply order optimization, helping planners focus on exceptions while reducing manual review cycles.

- **DEO AI Assist.**
  GAINS has advanced its DEO AI Assist as an explainable AI layer across the platform. The assistant translates model outputs into actionable recommendations that planners can trace back to specific business drivers, supporting trust and adoption by avoiding black-box decision-making.

- **Risk-adjusted network design.**
  GAINS introduced Risk-Adjusted Design, a next-generation network design capability that embeds demand and facility risk probabilities directly into the optimization process. The update produces intermediate feasible solutions that expose a set of alternative viable networks within your "zone of indifference," revealing tradeoffs and risk levels.

- **GAINS X and GAINS Connect.**
  GAINS continued to modernize its GAINX cloud platform experience through GAINS X to strengthen the connection

between network design and planning by allowing demand and machine-learning predictions to feed into simulations more directly. GAINS Connect API integration suite provides integration with one or multiple ERPs or systems record.

- **Design-as-a-Service delivery model.**
  GAINS introduced Design-as-a-Service as a delivery model. This approach can help customers access network design expertise and scenario analysis without requiring the same level of internal design maturity or dedicated modeling resources.

Logility introduced Orchestration Center, a real-time agentic AI layer that connects planning, production, supplier management, transportation, and execution.

Logility

Logility, an Aptean company, is recognized as an Accelerator in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities through its Decision Intelligence Platform, supporting organizations across apparel, chemicals, consumer packaged goods, durable goods, high tech, food and beverage, industrial manufacturing, life sciences, process manufacturing, retail, service parts, and wholesale distribution. The platform supports demand planning, inventory optimization, supplier management, scenario planning, S&OP, S&OE, supply optimization, supply chain design, product planning, and manufacturing execution and optimization.

The Decision Intelligence Platform provides foundational capabilities for data management, machine learning, analytics, optimization, scenario modeling, intelligent workflows, personalized workspaces, and predictive intelligence. Core planning offerings include Scenario Planning for S&OP, S&OE, operational scenario analysis, and Decision Command Center; Demand Planning through DemandAI+ and Demand Sensing; Inventory Optimization through InventoryAI+, multi-echelon inventory optimization, and automated inventory policies; Supplier Management; Supply Optimization; Supply Chain Design; Product Planning; and Manufacturing Execution and Optimization. Following its acquisition by Aptean, Logility now operates as the planning and optimization layer within the broader Aptean portfolio, connecting planning decisions with complementary ERP, transportation management, warehouse management, and execution capabilities across the enterprise.

Logility has continued to expand its AI capabilities through Vertical AI, Intelligent Network Optimization, and its Agentic AI Framework. Vertical AI supports conversational planning, task execution, and industry-specific planning workflows, while Intelligent Network

Optimization evaluates network scenarios and optimization opportunities across the supply chain. The Agentic AI Framework introduces planning agents that assist users with forecasting, inventory, supply, and scenario analysis while coordinating actions across connected planning processes. Together, these capabilities are intended to improve forecast quality, identify exceptions, evaluate alternative scenarios, monitor supplier and network risks, and support more coordinated planning and execution decisions across the broader Aptean ecosystem.

Logility's position within Aptean extends its planning footprint by connecting SCP decisions with ERP, transportation management, warehouse management, manufacturing execution, and operational workflows.

Updates in the last 12 months:

- **Orchestration Center.**
  Logility introduced Orchestration Center, a real-time, agentic AI orchestration layer that connects planning, production, supplier management, transportation, and execution workflows. The capability serves as a control layer above existing systems, helping users translate live signals into business impact and coordinate responses across the supply chain with fewer manual handoffs.

- **DemandAI+ on AppCentral.**
  Aptean released Logility DemandAI+ on AppCentral, bringing prebuilt AI agents into demand planning and forecasting workflows. The agents support forecast accuracy review, historical data retrieval, demand trend detection, and training opportunity identification, helping planners focus on higher-impact decisions while maintaining control over where AI acts autonomously or with human review.

- **OpsVeda acquisition and execution orchestration.**
  Aptean acquired OpsVeda to add real-time orchestration and AI-powered command center capabilities to the Logility platform. The acquisition strengthens Logility's ability to bridge planning and execution by improving visibility, accelerating decision-making, and supporting continuous orchestration across operational workflows.

- **AppCentral and decision-centric operations.**
  Aptean continued to expand AppCentral and Aptean Intelligence as an AI foundation for industry-specific applications, including supply chain planning, manufacturing execution, transportation management, and logistics. These updates support Logility's broader move toward decision-centric operations by connecting AI agents, role-based workspaces, intelligent workflows, and predictive insights across the end-to-end supply chain.

New Horizon Soft

New Horizon Soft provides configurable supply chain planning for consumer packaged goods and mid-market organizations, emphasizing AI explainability and fast deployment.

New Horizon Soft is recognized as an Accelerator in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning software for organizations across consumer packaged goods, foodservice, manufacturing, retail, and wholesale distribution. Its New Horizon Planning Suite includes strategic planning, S&OP, demand planning, supply planning, Buyers Workbench, production planning, multi-echelon inventory optimization, and replenishment planning. These applications are supported by the New Horizon Platform, which provides a unified data repository, integration services, security services, AI and machine learning capabilities, workflow engine, administration, and user experience services on a public cloud infrastructure.

New Horizon's planning capabilities are designed to support end-to-end coordination across demand, supply, production, procurement, inventory, and replenishment processes. The platform uses a centralized architecture to support data access, planning collaboration, and workflow execution across departments. Its modular design allows organizations to deploy planning capabilities incrementally, while industry templates and consulting services can support faster implementations for customers with defined planning requirements. Within SCP, the platform supports inventory optimization, production efficiency, constrained planning, replenishment decisions, and broader supply chain responsiveness.

New Horizon has embedded AI and machine learning capabilities across demand and supply planning workflows. In demand planning, the platform supports automatic detection of data issues, automated demand segmentation, and forecast model selection using methods such as Meta Prophet, TensorFlow, scikit-learn, and recurrent neural networks. In supply planning, New Horizon supports rough-cut capacity planning, AI-driven constrained master production scheduling, stockout and overstock diagnosis, truckload optimization, tariff change planning, investment planning optimization, root-cause diagnosis for supply chain issues, and MEIO-driven inventory recommendations. The vendor also provides the New Horizon AI Agent, a chat interface within the platform intended to help users interact with planning data, surface insights, and support planning workflow execution.

Product updates over the last 12 months:

- **Expanded forecasting model coverage.**

New Horizon added detailed production scheduling with interactive Gantt visualization and drag-and-drop adjustments, as well as truckload and container optimization.

New Horizon expanded its forecasting model library to support a broader range of demand patterns, product behaviors, and planning scenarios. The update improves model fit at the product-location level and can help customers improve forecast performance across more variable demand environments.

- **External and causal signal support.**
  New Horizon enhanced support for external and causal data inputs within demand planning workflows. This enables customers to incorporate additional market and operational signals into forecasts and improve responsiveness to changing demand conditions.

- **AI explainability.**
  New Horizon introduced additional explainability capabilities to help planners understand the drivers behind forecasts, recommendations, and confidence levels. These updates improve transparency and support planner trust in AI-driven planning outputs.

- **Configurable AI agent.**
  New Horizon expanded its AI Agent with configurable workflows and natural language interaction across planning operations. The capability helps users diagnose exceptions, query planning data, and reduce manual analysis within daily planning workflows.

- **Tariff-aware procurement optimization.**
  New Horizon enhanced procurement optimization to account for tariff scenarios, inflation impacts, supplier risk, effective dates, and working capital tradeoffs. This helps procurement teams evaluate buy-now-versus-later decisions and adjust sourcing strategies under changing market conditions.

- **Master purchasing receipt scheduling.**
  New Horizon expanded Master Purchasing Receipt Scheduling to optimize purchase receipt timing and level-load inbound distribution center operations. The capability can help customers reduce receiving bottlenecks, improve labor utilization, and better coordinate procurement plans with warehouse capacity constraints.

- **Transportation load optimization.**
  New Horizon enhanced truckload and container optimization within Buyers Workbench. These updates support more efficient shipment planning, reduced transportation costs, and tighter alignment between procurement planning and execution.

- **Detailed production scheduling.**
  New Horizon added advanced production scheduling with interactive Gantt visualization, drag-and-drop adjustments, production constraint visibility, and sequencing support. The update helps planners build more executable production plans and respond more quickly to operational changes.

- **Cross-functional analytics dashboards.**
  New Horizon released enhanced analytics dashboards with deeper visibility across demand, supply, procurement, and inventory planning workflows. The update supports faster issue diagnosis by giving users more contextual drill-down across connected planning areas.

- **Mobile monitoring and alerting.**
  New Horizon expanded mobile monitoring and alerting capabilities to improve visibility outside traditional desktop workflows. This helps users respond more quickly to exceptions, plan changes, and operational risks.

- **ERP integration and deployment flexibility.**
  New Horizon expanded ERP integration capabilities and deployment options to simplify implementation and accelerate time to value. Customers can use these updates to reduce integration friction and stand up planning capabilities more quickly.

- **Microsoft ecosystem support.**
  New Horizon continued to expand support for Microsoft Azure and Microsoft Dynamics 365 through Microsoft AppSource. This improves accessibility for Microsoft ERP customers and supports faster deployment within Microsoft-centered technology environments.

New Horizon expanded its forecasting library, added external and causal signal support, and introduced a configurable AI agent with natural-language interaction.

Slimstock

Slimstock is recognized as an Accelerator in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning and inventory optimization capabilities through its Slim4 platform, supporting organizations across manufacturing, wholesale, retail, e-commerce, and MRO sectors. Slimstock serves industries including automotive, building supply, consumer goods, fashion, food and grocery, industrial components, mining, multimetal, paper and packaging, healthcare, and sanitary products. Slim4 is structured around three connected domains: agentic data management, supply chain management, and commerce management, enabling

organizations to connect planning data, inventory decisions, and commercial planning processes within a single ecosystem.

Slim4's supply chain planning capabilities include demand forecasting, channel forecasting, demand planning and sensing, supply planning, production planning and scheduling, collaboration, integrated business planning, S&OE, S&OP, and scenario planning. Its inventory management capabilities include inventory optimization, automated replenishment, multi-echelon inventory optimization, allocation, network rebalancing, open-to-buy planning, and shelf-life management. These capabilities are designed to help organizations balance service levels, inventory investment, availability, and operational efficiency across complex assortments and distribution networks.

Slimstock has also expanded Slim4 into commerce management use cases, including price management and optimization, promotion management and planning, assortment and range management, and merchandise planning. The platform's data management layer supports the standardization and use of planning data across these workflows, while SlimGPT provides a generative AI assistant experience for users interacting with the platform. Within SCP, Slimstock's AI messaging is most relevant in areas such as demand planning, inventory optimization, replenishment, exception management, and user guidance, where the platform can help planners interpret data, evaluate recommendations, and coordinate planning actions across demand, supply, inventory, and commercial processes.

Slimstock connected Slim4's operational planning to Vena's FP&A platform and partnered with KPMG on AI-driven inventory transformation for mid-market organizations.

Updates over the last 12 months:

- **Vena partnership for monetized S&OP.**
  Slimstock expanded its strategic partnership with Vena to connect Slim4's operational planning capabilities with Vena's FP&A platform. The joint solution helps customers evaluate supply chain decisions through a financial lens, including impacts on revenue, margin, cash flow, and working capital, supporting tighter alignment between S&OP and financial planning.

- **KPMG transformation partnership.**
  Slimstock partnered with KPMG to help mid-market organizations connect supply chain strategy, process redesign, and AI-driven inventory optimization. The partnership combines KPMG's transformation frameworks with Slim4's planning capabilities to

support working capital improvement, service-level protection, planner productivity, and faster digital modernization.

Core Providers

Core Providers in the 2026 Enterprise SCP Technology Value Matrix include Arkieva, Coupa, Manhattan Associates, QAD | Redzone, River Logic, and Sunstice.

Arkieva

Arkieva is recognized as a Core Provider in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities through Arkieva Orbit, its in-memory digital supply chain planning platform. Arkieva supports planning processes across demand, inventory, supply, financial, S&OP management, and sustainable planning. The platform is designed to help organizations create a "One-Plan" S&OP process by connecting demand, supply, inventory, financial, and operational inputs into a common planning environment.

Arkieva's demand planning capabilities include lifecycle and promotional optimization, statistical forecasting methods, and sentiment analysis. Its inventory planning capabilities include inventory analysis and multi-echelon inventory optimization, while supply planning capabilities include rough-cut capacity planning, supply planning, replenishment planning, order promising, and scheduling. The platform also supports financial planning and S&OP management through integrated business planning, collaborative planning, what-if scenario analysis, Sales Central, and Arkieva Beacon, which provides visibility into S&OP performance and planning execution.

Arkieva Orbit's in-memory architecture supports planning analysis, scenario modeling, and cross-functional collaboration across planning teams. Within SCP, Arkieva's value lies in its ability to align functional planning processes around a shared operating plan, helping organizations evaluate trade-offs across demand, inventory, capacity, supply, service levels, and financial objectives. Its sustainable planning capabilities also extend the platform's use cases by enabling organizations to incorporate environmental and operational considerations into planning decisions.

Arkieva Orbit supports a "One-Plan" S&OP process by connecting demand, supply, inventory, financial, and operational inputs into a common planning environment.

Coupa

Coupa delivers supply chain design and planning through its Direct Spend Management portfolio, integrating network and inventory modeling with sourcing and procurement.

Coupa is recognized as a Core Provider in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain design and planning capabilities within its Direct Spend Management portfolio, supporting organizations that need to model, analyze, and optimize supply chain networks, transportation flows, inventory positions, and demand scenarios. Coupa's SCP-related capabilities include network, transportation, and inventory optimization, demand modeling, tariff impact planning, and App Studio for extending and configuring planning workflows. These capabilities are designed to help organizations evaluate supply chain tradeoffs across cost, service, risk, working capital, and network resiliency.

Coupa's supply chain design and planning capabilities are part of the vendor's broader design-to-pay platform, which connects supply chain design and planning, supply chain collaboration, source-to-contract, procure-to-pay, accounts payable automation, and treasury and cash management. The platform also includes supply chain collaboration capabilities for purchase order, forecast, and inventory collaboration, enabling organizations to align planning and supplier execution decisions across direct-spend processes. This gives Coupa a planning position that is more closely tied to sourcing, supplier collaboration, procurement, financial operations, and spend management than traditional stand-alone SCP suites.

Coupa has also expanded its AI strategy through Coupa AI, Navi, Navi Agent Studio, and Navi Connect. Navi Agent Studio allows organizations to build AI agents, while Coupa provides a library of AI use cases across its platform. For supply chain customers, relevant capabilities include Demand Modeler, supply chain prescriptions for cost savings and network risk reduction, Inventory Insights, a Supply Chain Knowledge Management Agent, and a Network Modeling Agent. These tools are intended to support scenario modeling, network analysis, inventory review, knowledge access, and planning recommendations within Coupa's broader direct spend and design-to-pay environment.

Manhattan Associates

Manhattan Associates is recognized as a Core Provider in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities through Manhattan ActivePlanning, which is built on Manhattan ActivePlatform. Manhattan supports organizations across wholesale, consumer goods, grocery, manufacturing, medical

and pharmaceutical, retail, and transportation-intensive industries. Its planning capabilities are positioned within a broader supply chain commerce ecosystem that includes order management, point-of-sale, store inventory and fulfillment, CRM, digital self-service, warehouse management, labor management, transportation management, yard management, demand forecasting, replenishment, allocation, and unified business planning.

Manhattan Associates introduced Sightline within ActivePlanning to explain AI-driven forecasts and inventory decisions in plain business language, reducing reliance on Excel and BI tools.

Manhattan ActivePlanning supports demand forecasting, replenishment, allocation planning, multi-echelon inventory optimization, and unified business planning. Demand forecasting capabilities include multi-level forecasting, omnichannel planning, demand cleansing and profiling, seasonal simulation, self-correcting intelligence, replenishment, allocation, and MEIO. Replenishment capabilities include strategic planning and inventory optimization, inventory alignment, order review and approval, promotional buying, network inventory optimization, and inventory performance analysis. Allocation capabilities support omnichannel fulfillment alignment, scenario planning and simulation, and allocation planning. Manhattan's unified business planning combines S&OP and S&OE concepts to help organizations align planning decisions with execution constraints and near-term operational changes.

Manhattan Associates has also expanded its AI messaging through ActiveAgents, which the vendor describes as agents that can think, see, and do across workflows on ActivePlatform. For supply chain planning, prebuilt agents include the Supply Chain Wave Agent, which supports planning-related analysis and workflow execution within the Manhattan Active environment. Manhattan Associates also offers Agent Foundry, an agent builder tool that enables customers and partners to build agents on ActivePlatform. Within SCP, these capabilities extend Manhattan's planning-to-execution model by helping users identify exceptions, evaluate replenishment or allocation decisions, and coordinate actions across omnichannel fulfillment and inventory operations.

Updates over the last 12 months:

- **Sightline decision intelligence.**
  Manhattan Associates introduced Sightline within ActivePlanning to explain the reasoning behind AI-driven forecasts, recommendations, order projections, and inventory decisions in plain business language. The capability gives planners in-application visibility into drivers such as forecast inputs, safety stock

logic, lead times, promotions, fulfillment shifts, and network movements, reducing reliance on Excel or third-party BI tools for investigation.

- **Solution Design Studio.**
  Manhattan Associates debuted Solution Design Studio, an AI-powered workspace that allows business users to configure Manhattan Active solutions using natural-language blueprints. The capability supports faster design and deployment by translating operational intent into live configuration across Manhattan Active applications within defined platform guardrails.

- **Manhattan Marketplace and agent ecosystem.**
  Manhattan Associates introduced the Manhattan Marketplace, a shared ecosystem where customers and partners can discover and deploy agents, extensions, and accelerators built on ActivePlatform. The update expands platform extensibility by allowing partner-built capabilities to run natively within Manhattan's environment without requiring complex integration projects.

Manhattan Associates debuted Solution Design Studio to configure Manhattan Active solutions from natural-language blueprints, and opened the Manhattan Marketplace for agents.

QAD | Redzone

QAD | Redzone is recognized as a Core Provider in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides digital supply chain planning (DSCP) and scheduling capabilities as part of the broader QAD | Redzone manufacturing operations platform, supporting organizations across consumer markets, including food and beverage and consumer goods, as well as process and semi-process industries such as pharmaceuticals, chemicals, and industrial manufacturing. QAD | Redzone's supply chain capabilities span planning, sourcing, manufacturing, and delivery processes, QAD Digital Supply Chain Planning & Scheduling supports demand planning, production planning, distribution planning, procurement planning, S&OP, demand-driven material requirements planning, advanced scheduling, financial planning, and supply chain analytics. These capabilities are designed to help manufacturers improve forecast accuracy, service levels, stock availability, overstock management, and planning agility. The platform also connects with QAD | Redzone 's broader application portfolio, including supplier relationship management, connected worker, ERP, and global trade and transportation execution, enabling organizations to align planning decisions with supplier collaboration, procurement, logistics, quality, and manufacturing execution processes.

QAD | Redzone has also expanded its AI capabilities through ChampionAI, including ChampionAI Knowledge Assist, a

conversational assistant designed to guide users through system processes and provide contextual recommendations using natural language. Within the SCP context, this supports QAD | Redzone's broader focus on improving the accessibility and explainability of planning and operational workflows rather than replacing planner judgment. For manufacturing organizations already operating within QAD | Redzone's ecosystem, the value of DSCP is its ability to connect planning and scheduling with manufacturing, quality, supplier, and trade promotions in a single operational environment.

QAD | Redzone enhanced distribution planning with safety-stock prioritization and two-step allocation, and added real-time optimizer progress visibility in its web UI.

Updates over the last 12 months:

- **Distribution planning enhancements.**
  QAD | Redzone enhanced distribution planning with new capabilities for safety stock prioritization, two-step allocation, picking time calculations, transport mode prioritization, DRP allocation rules, and unit-level constraint management. These updates support more predictable replenishment and deployment decisions across multi-echelon distribution networks.

- **Freight and transport planning.**
  QAD | Redzone expanded freight-related planning parameters, including preferred transport mode selection and picking time visibility within distribution calculations. The updates help planners better account for lead time, warehouse readiness, and transportation tradeoffs when generating distribution plans.

- **Manufacturing intelligence for production planning.**
  QAD | Redzone added production-planning capabilities for overtime planning, resource-level cost evaluation, dependent-requirement identification, and aggregated monitoring dimensions. These enhancements help manufacturers better balance capacity, cost, sales demand, and component requirements across production plans.

- **Optimizer visibility in the web UI.**
  QAD | Redzone introduced real-time optimizer progress visibility in the web interface, including estimated completion percentage and the ability to stop long-running calculations. This improves usability by giving planners more transparency and control during complex planning runs.

- **Embedded trade promotions management.**
  QAD | Redzone enhanced trade promotions management within demand planning, supporting a common source for internal and

external promotion-driven demand signals. The updates strengthen support for food and beverage and CPG manufacturers by helping planners incorporate future promotions, uplift estimates, halo and cannibalization effects, and baseline impacts into demand plans.

QAD | Redzone acquired Kavida.ai to accelerate its ChampionAI agentic roadmap and introduced ChampionAI through an expanded AWS collaboration.

- **Promotion planning usability improvements.**
  QAD | Redzone added capabilities to initialize future promotion plans from prior-year events, apply configurable date shifts, estimate future uplift, and drill into promotion details directly from planning grids. These improvements can reduce manual planning effort and improve visibility into the impact of promotional activity on demand.

- **Kavida.ai.**
  QAD | Redzone acquired Kavida.ai to accelerate its ChampionAI agentic AI roadmap and expand agentic automation across procurement and supply chain workflows. For DSCP customers, the acquisition can reduce manual buyer effort across post-order management, supplier communications, RFQs, and purchase order workflows, allowing teams to focus more on exceptions and supplier strategy.

- **ChampionAI introduction.**
  QAD | Redzone introduced ChampionAI through its expanded collaboration with AWS, bringing agentic AI into ERP, operational, and supply chain workflows for manufacturers. The capability supports embedded decision support, intelligent automation, and faster deployment for customers looking to modernize planning and execution processes without adding enterprise-level complexity.

- **AI assistant for planning workflows.**
  QAD | Redzone added an embedded AI chatbot within Supply Chain Planning, allowing planners to enter personalized prompts and receive task guidance inside the application. The assistant integrates QAD Knowledge Assist, enabling customers to extend responses with their own documentation while supporting explainable outputs in plain language.

- **SaaS security and auditability.**
  QAD | Redzone enhanced its SaaS platform with user connection tracking, unified logging, scope aggregation controls, task sequence group security, and interface error detection. These

updates strengthen auditability, security administration, and operational monitoring across planning modules.

- **Automated testing and migration support.** QAD | Redzone introduced automated non-regression testing that allows customers to validate their own database models before migrating live environments to the latest version. This can reduce upgrade risk by giving teams a structured way to compare results and identify issues before moving changes into production.

River Logic launched RIA, an AI assistant for its Value Chain Optimization solution, powered by Enterprise Optimizer.

River Logic

River Logic is recognized as a Core Provider in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning and optimization capabilities through River Logic Value Chain Optimization (VCO), which is powered by its Enterprise Optimizer (EO) technology. Enterprise Optimizer serves as River Logic's Digital Planning Twin on Microsoft Azure, enabling organizations to model operational, financial, and network constraints across complex value chains. River Logic VCO is designed to help organizations evaluate planning decisions based on their impact on cost, margin, capacity, service, and strategic objectives.

River Logic's VCO capabilities include capacity planning, integrated business planning, manufacturing footprint optimization, network design, order allocation, and strategy planning. The platform is particularly well-suited for organizations that need to evaluate trade-offs among production capacity, supply constraints, demand scenarios, network structure, financial outcomes, and customer commitments. By connecting operational planning variables with financial and strategic objectives, River Logic supports planning use cases that require optimization across multiple constraints rather than isolated functional planning decisions.

River Logic's AI messaging is centered on the River Logic Intelligent Assistant, which provides users with direct access to Enterprise Optimizer's capabilities. RIA is intended to help users interact with optimization models, evaluate planning scenarios, and surface recommendations from the digital planning twin. Within SCP, this supports River Logic's broader focus on making complex optimization more accessible to business users while maintaining the platform's emphasis on constraint-based planning, scenario analysis, and value chain decision support.

Updates over the last 12 months:

- **RIA Intelligent Assistant.**
  River Logic launched RIA, an AI assistant for its Value Chain Optimization solution, powered by Enterprise Optimizer. RIA provides context-aware guidance, scenario configuration support, information retrieval, result analysis, and recommendations, helping business users and planners evaluate optimization outputs and explore additional scenarios with less manual analysis.

- **VCO usability and performance enhancements.**
  River Logic released major updates to its Value Chain Optimization platform, including a redesigned user interface, improved workflows, enhanced visualizations, expanded reporting, browser integration, faster solve node speeds, and improved reliability. These updates make the platform easier for business users and consultants to navigate while improving planning productivity and model execution performance.

- **Financial and strategic modeling expansion.**
  River Logic expanded VCO's financial modeling and scenario analysis capabilities, including support for tariff impact analysis, regional and business-unit financial statements, profitability analysis, capex constraints, transfer pricing, P&L, cash flow, balance sheet, and financial ratios. These updates help customers evaluate value chain decisions by considering operational and financial trade-offs across sourcing, manufacturing, logistics, capacity, and product portfolio strategies.

- **Industry-specific optimization support.**
  River Logic enhanced VCO to support more industry-specific constraints, including supply strategies, blend optimization, customer contracts, and product portfolio priorities. These capabilities help organizations model business-specific tradeoffs and align optimization outputs with strategic, operational, and financial objectives.

River Logic expanded Value Chain Optimization with tariff impact analysis, industry-specific constraints, and a redesigned interface for financial and strategic modeling.

Sunstice

Sunstice, formerly FuturMaster, is recognized as a Core Provider in the 2026 Enterprise SCP Technology Value Matrix. The vendor provides supply chain planning capabilities to organizations across manufacturing, process manufacturing, consumer goods, retail, and other supply chain-intensive industries, with a largely European customer base. The company rebranded from FuturMaster to Sunstice as part of a broader strategic repositioning after more than 30 years in supply chain planning. Its current positioning centers on Structured

Agility, a planning framework designed to help organizations improve foresight, prepare for disruption, support strategic reorientation, respond to crises, and orchestrate growth and profitability.

Sunstice introduced Helios, an agentic AI platform that accelerates planning cycles by automating root cause analysis and scenario evaluation via MCP.

The Sunstice planning foundation supports integrated business, demand, and supply planning, as well as revenue growth management. The platform combines data integration, a common data model, artificial intelligence, dynamic digital twin capabilities, and optimization to support planning decisions across strategic, tactical, and operational horizons. Core capabilities include S&OP, demand planning, procurement planning, supply planning, inventory optimization, and revenue growth management. These capabilities help organizations connect sales, marketing, manufacturing, sourcing, and finance teams while accounting for supplier constraints, minimum order quantities, transportation capacities, demand signals, and broader supply chain tradeoffs.

Sunstice has also introduced Helios, an agentic AI platform designed to accelerate planning decision cycles through root-cause analysis, scenario evaluation, and next-best-action recommendations. Helios supports inter-agent workflows in which planning agents can detect and rank risks or opportunities, simulate cost and service impacts, present ranked options for planner review, and write approved actions back to enterprise systems. The platform maintains human-in-the-loop validation, business-rule guardrails, and audit traceability for agent-supported planning actions, aligning with Sunstice's emphasis on structured decision-making rather than fully autonomous planning.

Updates in the last 12 months:

- **Helios agentic planning platform.**
  Sunstice introduced Helios, an agentic AI platform designed to accelerate planning decision cycles by automating root-cause analysis, scenario evaluation, and next-best-action recommendations. The platform keeps planners in control through human-in-the-loop validation, business-rule guardrails, and full audit traceability across agent-supported planning actions.

- **MCP-based agent connectivity.**
  Sunstice expanded Helios's enterprise connectivity via the Model Context Protocol, enabling agents to access governed planning data, business rules, and enterprise systems through a common layer. This supports more consistent decision-making across ERP, S&OP, Control Tower, scenario planning, and collaboration

workflows while maintaining authentication, scope control, and traceability.

Sunstice added native detailed scheduling and AI- and digital-twin-supported scheduling to model production resources, constraints, and disruptions.

- **Expert agents and contextual agent builder.**
  Sunstice added expert agents for common planning use cases, including root-cause analysis and next-best-action recommendations. The company also introduced a Contextual Agent Builder that allows organizations to configure business-specific agents with company instructions, processes, and guardrails.

- **Native detailed scheduling.**
  Sunstice expanded its platform with native, detailed scheduling capabilities that integrate strategic planning, replenishment, RCCP, MPS, MRP, and resource-level sequencing into a single planning model. This helps close the gap between aggregate supply plans and shop-floor execution by using shared constraints, calendars, network structures, and policy logic across planning horizons.

- **AI and digital twin scheduling.**
  Sunstice added AI- and digital-twin-supported scheduling to improve the modeling of production resources, constraints, and operational disruptions. The capability can help industrial companies generate more executable schedules, reduce expedited cycles, and respond more quickly to factory-level changes.

- **Role-based workspaces.**
  Sunstice introduced Workspaces to tailor the application experience by role, scope, and planning responsibility. The update improves usability by surfacing relevant information, alerts, and actions for each user while supporting faster role switching and more controlled data access.

- **Local optimization.**
  Sunstice added local optimization capabilities that allow planners to re-optimize only the affected portion of a plan after a disruption. This supports faster response times while maintaining alignment with the broader global plan, reducing the risk that local changes create downstream planning conflicts.

- **Integration platform.**
  Sunstice introduced an integration platform built around planning-ready data pipelines, including read, parse, map, validate, and write workflows. The platform includes no-code transformation, master

data validation, quarantine for invalid records, and outbound publishing of planning outputs to ERP and MES systems.

- **AI-enabled data quality monitoring.**
  Sunstice added embedded AI and machine-learning monitoring for integration pipelines, including latency tracking, schema-drift detection, volume anomaly detection, retries, and alerting. This can reduce data-related planning errors and help planning teams identify integration issues before they affect planning runs.

- **Collaboration Hub.**
  Sunstice introduced a Collaboration Hub that brings structured collaboration into the planning environment through context-aware sessions, notifications, and assigned action tasks. The capability helps teams turn planning discussions into trackable actions with clear ownership, priority, expected outcomes, and visibility into status.

Sunstice added AI-enabled data quality monitoring for integration pipelines and a Collaboration Hub that brings context-aware collaboration into planning.