

SUPPLY CHAIN RESEARCH

Global Trade Management

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting global trade management software: what these systems do, how they handle customs, compliance, and duty, how the market and vendors stack up in 2026, what they cost, how to run the selection, and how to de-risk the rollout.

Prepared by Supply Chain Research · 2026 · Independent, vendor-neutral research

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1. Executive summary

Global trade management software runs the compliance, customs, and duty side of moving goods across borders. It classifies products, screens counterparties against restricted-party lists, determines licenses and controls, files customs declarations, manages preferential origin and free-trade-agreement claims, and calculates landed cost. Underneath sits a vast, constantly changing body of trade content: tariff schedules, sanctions lists, and regulations across more than two hundred countries. For years this was a specialist back-office function. Two forces have made it strategic. AI has begun to automate the classification and content work that consumed armies of analysts, and the sharpest tariff upheaval in nearly a century has put trade cost on the boardroom agenda. In 2026 the category is being reshaped by AI, by a wave of consolidation, and by a macro environment in which duty is suddenly a first-order number.

This guide is written for trade, supply chain, finance, and IT leaders evaluating a global trade management investment, and for the teams who must integrate it with the ERP and the logistics stack. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best platform, because the right choice depends on whether you mainly export or import, how complex your product and country footprint is, and whether you want a full trade platform or a focused compliance tool. The pages that follow define the category, size the market honestly while flagging two name collisions that corrupt the figures, profile the platform, customs-network, and specialist tiers, lay out an evaluation framework, and explain why trade-content currency and classification accuracy, not the feature list, decide the return.

~\$1.3-1.5B

the credible size of the GTM software market, well below the conflated figures

IDC, not Gartner

the authoritative lens is the IDC MarketScape, split in 2025 into two assessments

Tariffs on top

2025 brought the highest US effective tariff rate since the 1930s

What the evidence says

- **The credible market is around \$1.3B to \$1.5B.** Trustworthy 2025 estimates cluster near this figure; higher numbers fold in services or collide with unrelated markets, so size the software category with care.
- **Two name collisions corrupt the figures.** Global trade management is routinely confused with financial trade management, meaning securities trading, and with trade promotion management, meaning consumer-goods trade spend. They are different markets.
- **The analyst lens is IDC, not Gartner.** There is no Gartner Magic Quadrant for GTM; the authoritative benchmark is the IDC MarketScape, which in 2025 split into separate assessments for manufacturers and exporters and for retailers and importers.
- **Trade content is the real moat.** The value rests on the currency and accuracy of a vendor's trade content and classification, which is why the leaders emphasize tens of millions of annual content updates.

- **Tariffs have made this urgent.** The 2025 tariff upheaval pushed duty from a back-office detail to a board-level cost, sharply raising the stakes on getting trade management right.

2. What global trade management software is

Global trade management software automates the compliance, customs, and cost work of cross-border trade. IDC defines it as software and services supporting the trade compliance, logistics, and finance aspects of importing and exporting. The core capabilities are:

- **Product classification.** Assigning the correct harmonized tariff codes to products, the foundation on which duty, controls, and admissibility all depend.
- **Restricted-party and sanctions screening.** Checking customers, suppliers, and partners against denied-party, sanctions, and watch lists to avoid prohibited transactions.
- **Export and import controls.** Determining license requirements and controls for controlled goods, and enforcing them before a shipment moves.
- **Customs filing and documentation.** Preparing and filing customs declarations and the documents that clear goods through border authorities.
- **Duty, origin, and FTA management.** Calculating duty and landed cost, and managing preferential origin and free-trade-agreement claims to reduce it lawfully.

Trade content: the engine underneath

The single most important thing to understand about GTM is that it runs on trade content. Behind the software sits a continuously updated body of tariff schedules, duty rates, restricted-party lists, licensing rules, and regulations across more than two hundred countries, and that content changes constantly. A platform is only as good as the currency and accuracy of the content behind it: a stale tariff code or a missed sanctions update is not a cosmetic flaw but a compliance failure with legal and financial consequences. This is why the leading vendors emphasize the scale of their content operations, with tens of millions of updates a year, and why classification accuracy, increasingly AI-assisted, is the heart of any evaluation.

Function	What it does	Failure means
Classification	Assigns tariff codes	Wrong duty, delays
Screening	Checks restricted parties	Prohibited trade
Customs filing	Files declarations	Border holds
Duty and FTA	Manages origin and duty	Overpaid duty

GTM is distinct from the transportation management systems that move freight, though the two increasingly converge, and from the tax-automation tools that handle sales and value-added tax, though customs and tax overlap. It is also distinct from the customs brokers and freight forwarders that provide trade services rather than software. Knowing whether you primarily export or import, and whether you need a full platform or a focused tool, is the first scoping decision.

3. The global trade management market in 2026

GTM is a mid-sized software market whose figures are corrupted by two name collisions. Credible 2025 estimates for global trade management software cluster near \$1.3B to \$1.5B, growing at roughly eight to eleven percent. But searches for trade management software also return financial securities-trading systems and consumer-goods trade-promotion tools, entirely different markets, so headline numbers must be read with care. Treat the figures below as directional, and check what each one is counting.

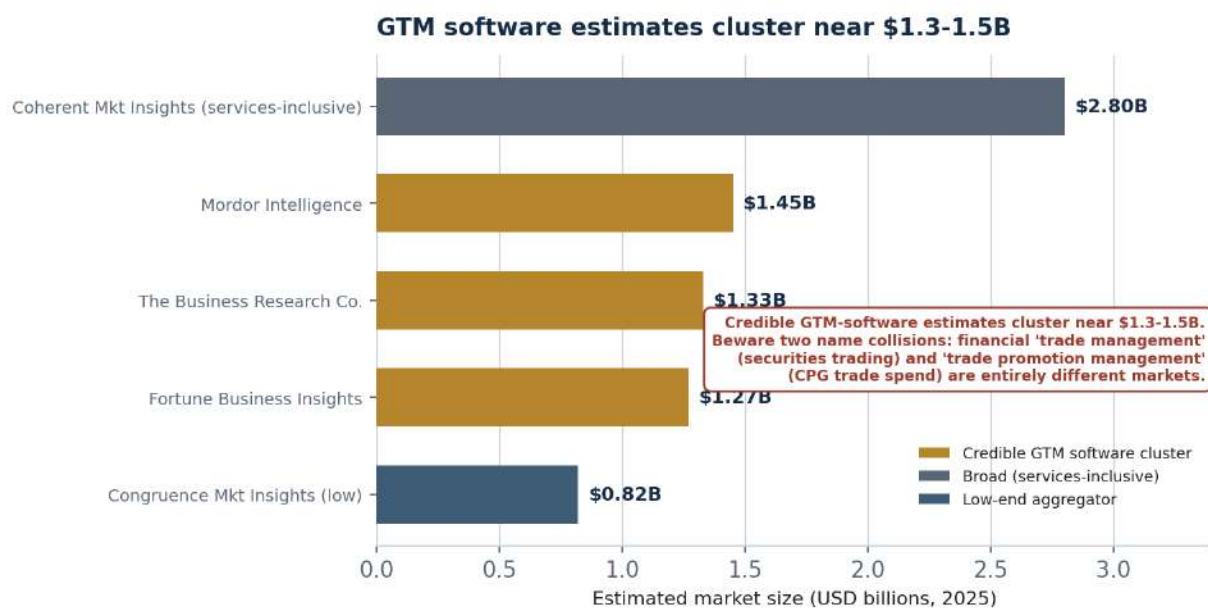
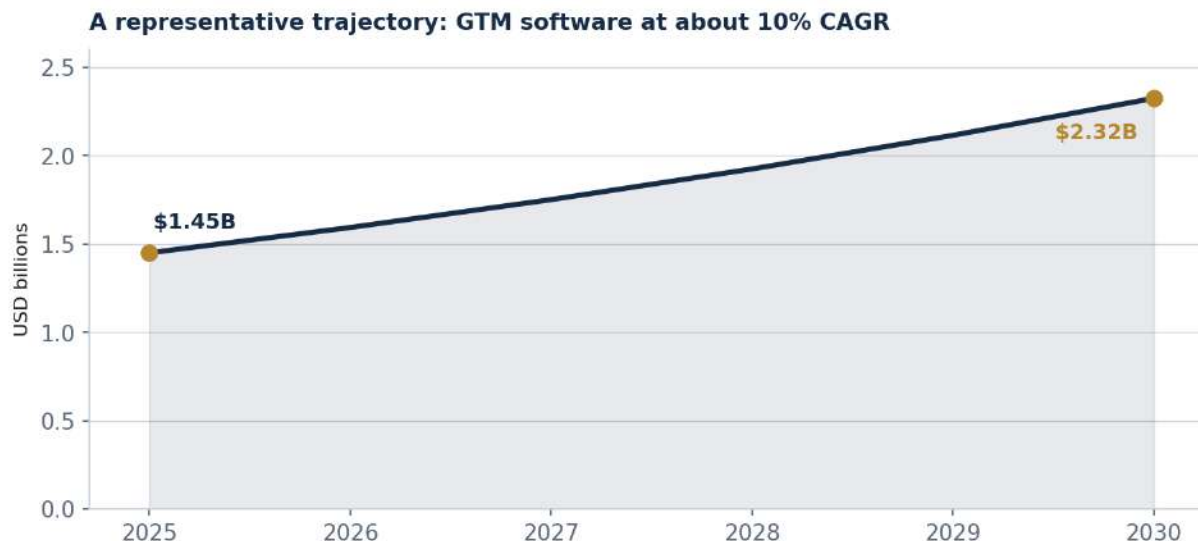


Figure 1. Published 2025 estimates. Credible GTM software figures cluster near \$1.3B to \$1.5B; the services-inclusive figure runs higher, and two unrelated markets share the name.

Source and definition	Size	Forecast	CAGR
Coherent Mkt Insights (services-inclusive)	\$2.80B (2025)	\$5.67B / 2032	10.6%
Mordor Intelligence	\$1.45B (2025)	\$2.33B / 2030	9.9%
The Business Research Company	\$1.33B (2025)	\$2.02B / 2029	11.1%
Fortune Business Insights	\$1.27B (2025)	\$2.63B / 2034	8.5%
Congruence Mkt Insights (low)	\$0.82B (2025)	\$1.40B / 2033	6.9%



Source: Mordor Intelligence (9.9% CAGR, 2025-2030). Credible estimates span roughly 8 to 11 percent; the services-inclusive definition runs higher.

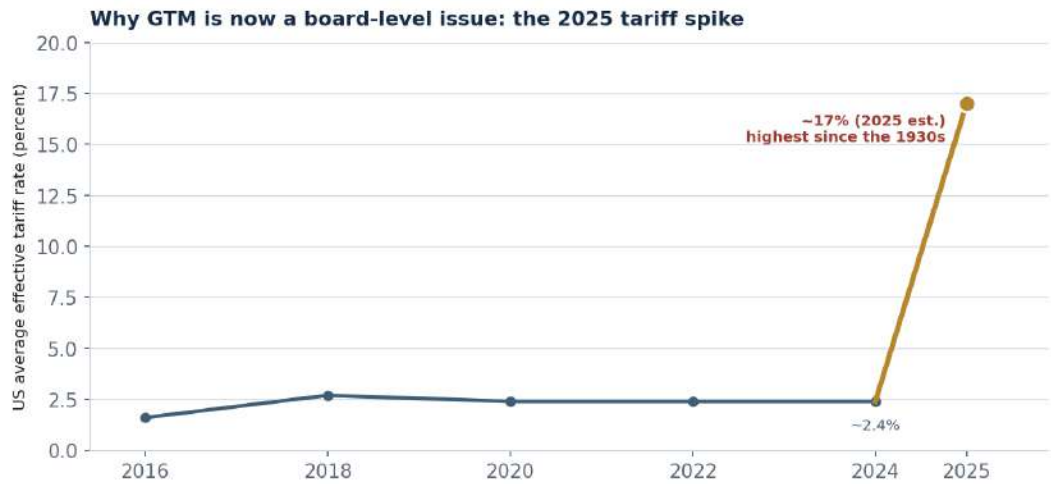
Figure 2. A representative trajectory for GTM software at about 10 percent CAGR (Mordor Intelligence). Credible estimates span roughly 8 to 11 percent.

Why the estimates diverge

The spread is part definition and part name collision. Some figures fold in the large services component of trade compliance, pushing the number toward \$2.8B; the pure-software category is nearer \$1.3B to \$1.5B. Cloud deployment leads at around 62 percent, North America holds roughly 37 to 39 percent with Asia-Pacific the fastest-growing, large enterprises dominate spend, and pharmaceuticals and transportation and logistics are prominent verticals. For planning, the credible software figures of around \$1.3B to \$1.5B in 2025 are the most defensible baseline, provided the two unrelated markets that share the trade management name are excluded.

Why tariffs changed the stakes

The defining event for this category is not a software release but a macro shock. Through 2025 the United States imposed the sharpest increase in tariffs in generations, and the average effective US tariff rate rose to its highest level since the 1930s, illustrated in Figure 3. For any company that trades across borders, duty went from a background detail to a material cost line, and the ability to classify accurately, claim preferential origin, and model tariff scenarios became a boardroom concern. This has raised both the urgency of GTM and the scrutiny on getting it right.



Source: approximate figures based on Yale Budget Lab and Tax Foundation estimates of the US average effective tariff rate. The 2025 figure is an estimate and moved through the year; shown as directional.

Figure 3. Approximate US average effective tariff rate, based on Yale Budget Lab and Tax Foundation estimates. The 2025 figure is an estimate and moved through the year; shown as directional.

4. The vendor landscape

The GTM market spans end-to-end trade platforms, customs and filing networks, tax and cross-border adjacencies, and compliance and content specialists. We group vendors into four tiers by what they do best, not by size. No vendor leads every tier, and a wave of consolidation has reshaped ownership across the field.

What the analysts say

The analyst picture here is distinctive: the authoritative lens is IDC, not Gartner. The essentials:

- **There is no Gartner Magic Quadrant for GTM.** Gartner does not maintain a dedicated GTM Magic Quadrant, so the ranked-grid buyers may expect does not exist for this category.
- **The IDC MarketScape is the benchmark, and it split in 2025.** IDC published two 2025 MarketScapes, one for manufacturers and exporters and one for retailers and importers, having combined them in 2022, a signal that import and export trade are now distinct enough to assess separately.
- **e2open and Thomson Reuters are Leaders in both.** e2open, now a WiseTech Global company, and Thomson Reuters ONESOURCE were named Leaders across both 2025 assessments, alongside other strong platforms and specialists.

Global trade management landscape, 2026



There is no Gartner Magic Quadrant for GTM; the authoritative lens is the IDC MarketScape, split in 2025 into Manufacturers/Exporters and Retailers/Importers (e2open and Thomson Reuters are Leaders in both). SCR interpretation, not analyst coordinates.

Figure 4. Supply Chain Research's directional map. There is no Gartner quadrant for GTM; these positions are our interpretation, not IDC MarketScape coordinates.

End-to-end trade platforms

These vendors offer the full breadth of trade compliance, content, and increasingly logistics. e2open, whose Global Knowledge content operation provides more than eighty million annual updates across two hundred and thirty countries, was acquired by WiseTech Global and combines trade with a large

multi-enterprise network. Thomson Reuters ONESOURCE Global Trade serves more than fifteen hundred companies and thirty-five thousand trade professionals, and has added AI classification and, through its Pagero acquisition, transportation. SAP Global Trade Services embeds trade in the SAP landscape, and Oracle GTM does the same for Oracle. Strengths: content depth, breadth, and enterprise integration. Limitations: they are larger commitments, and value is greatest within that vendor's ecosystem.

Customs and filing networks

These vendors are strong in customs filing and connectivity. Descartes, through years of acquisitions, offers customs filing, restricted-party screening, tariff content, and one of the largest logistics networks. QAD Precision, formerly Precision Software, is strong in export management and customs across regions, MIC Customs Solutions is a customs-filing specialist with deep European and global coverage, and BluJay, now part of e2open, added customs and logistics. Strengths: customs-filing depth and network reach. Limitations: some are narrower than the full platforms, and capabilities vary by region.

Tax adjacency and specialists

Two further groups complete the picture. Tax and cross-border adjacencies, Vertex and Avalara, come from indirect tax and increasingly touch customs and cross-border duty, while service-led players such as Livingston pair brokerage with technology. And compliance and content specialists, OCR Services, 3CE Technologies for classification, Bamboo Rose for retail sourcing and trade, and Aptean, offer focused capability. Strengths: tax integration and specialist depth respectively. Limitations: the tax players are not full GTM platforms, and the specialists address only part of the trade process.

Vendor summary

Vendor	Tier	Best fit	Notes
e2open (WiseTech)	End-to-end platform	Broad trade plus network	IDC Leader; 80M+ content updates
Thomson Reuters ONESOURCE	End-to-end platform	Compliance content plus AI	IDC Leader; added Pagero TMS
SAP GTS / Oracle GTM	End-to-end platform	ERP-standardized enterprises	Trade within the ERP suite
Descartes	Customs and filing network	Customs filing plus logistics	Large network; many acquisitions
QAD Precision / MIC	Customs and filing network	Export and customs depth	Strong regional coverage
Vertex / Avalara	Tax and cross-border	Tax-led cross-border needs	Indirect tax extending to trade
OCR Services / 3CE	Compliance specialist	Classification and compliance	Focused content and tools
Bamboo Rose / Aptean	Specialist	Retail sourcing and trade	Niche and industry-specific

Positions and notes are Supply Chain Research's interpretation from public information and the IDC MarketScape for global trade management, current to mid-2026. There is no Gartner Magic Quadrant for GTM. Ownership and scope change quickly, including WiseTech's acquisition of e2open; verify current details directly with each vendor.

5. How to evaluate a GTM platform

The differentiators in global trade management are trade-content coverage, import-versus-export fit, and integration, more than the headline feature list. We use five dimensions.

The five evaluation dimensions

- 1. Trade-content coverage and currency.** How complete and how current is the content, tariffs, duty rates, restricted-party lists, and regulations, across the countries you trade with? This is the foundation of everything else.
- 2. Import versus export fit.** Does the platform match your direction of trade? IDC now assesses exporters and importers separately because their needs differ, and the strongest vendors differ too.
- 3. Classification accuracy and AI.** How accurately does it classify products, including with AI, since a wrong tariff code drives wrong duty, delays, and compliance risk?
- 4. Integration.** How cleanly does it connect to your ERP, order management, and transportation systems, so trade compliance is embedded in the flow rather than a separate step?
- 5. Coverage, AI, and viability.** Assess country and customs-filing coverage for your lanes, AI and tariff-scenario capability, and the vendor's stability in a consolidating market.

Making the decision

Match the platform to your trade profile and stack. Large exporters and importers with complex products and many countries reward the end-to-end platforms such as e2open and Thomson Reuters ONESOURCE. Companies standardized on SAP or Oracle may reward the embedded module. Companies whose priority is customs filing reward Descartes, QAD Precision, or MIC. Companies with tax-led cross-border needs may start from Vertex or Avalara. Then validate content coverage and classification accuracy on your own products and lanes.

A selection process that works

- 1.** Define your direction of trade and your country and product footprint, and shortlist accordingly.
- 2.** Test content coverage and currency for the specific countries and goods you trade.
- 3.** Run a classification proof-of-concept on a sample of your real products, including AI classification.
- 4.** Probe ERP and logistics integration early, with real orders and shipments.
- 5.** Assess customs-filing coverage, tariff-scenario capability, and references in your industry.

6. Cost and pricing

Global trade management pricing typically scales with modules, transaction or shipment volume, the number of countries, and trade-content subscriptions, and integration drives part of the effort. The models you will encounter:

Pricing model	Typical basis	Notes
By module	Per capability	Screening, classification, customs priced apart
By volume	Per transaction or shipment	Scales with trade activity
Content subscription	Per country or coverage	Tariff and restricted-party content
Within a suite	Part of ERP cost	SAP GTS, Oracle GTM
Implementation	Project fee	Integration and content setup

What drives the number

The modules chosen, the volume of transactions, the number of countries, and the trade-content subscription are the main cost drivers, and integration with the ERP and logistics systems is the largest implementation effort. A full platform for a global exporter and importer is a substantial commitment, including ongoing content subscriptions; a focused screening or classification tool is far lighter. A common mistake is under-scoping the content coverage, then discovering the platform lacks current tariff or sanctions data for a country the business actually trades with. Model the full cost, including content subscriptions and integration, not the license alone, and weigh it against the duty savings and penalty avoidance the platform can deliver

GTM pricing is typically gated behind a sales process and depends heavily on scope, volume, and country coverage, so published figures should be treated as starting points. Build a content-coverage check and a classification proof-of-concept into the buying process to validate both cost and the compliance and duty benefits the vendor projects.

7. Implementation: where programs succeed or fail

Global trade management programs fail in predictable ways, and almost none of the failure modes are about the user interface. They are about content, classification, and integration. The recurring causes:

- **Trade content is incomplete or stale.** If the platform lacks current tariff, duty, and restricted-party content for the countries the business trades with, its outputs are wrong, and wrong in ways that carry legal and financial risk.
- **Classification is inaccurate.** If products are misclassified, duty is wrong, shipments are delayed, and compliance is breached, which is why classification accuracy is the make-or-break capability.
- **Integration with ERP and logistics is weak.** If trade compliance is not embedded in the order-to-ship flow, it becomes a manual bottleneck that people bypass under time pressure, defeating the purpose.
- **Import and export needs are conflated.** Treating importing and exporting as the same problem, when they require different content, controls, and workflows, leaves gaps that surface at the border.

Content	Classification	Integration
current, complete trade content is the precondition for correct outputs	accurate tariff coding is what keeps duty right and goods moving	embedding compliance in the flow stops people bypassing it

Three principles that separate success from failure

- **Verify content coverage first.** Confirm the platform has current, complete trade content for every country and product you actually trade, because stale content is a compliance failure, not a cosmetic gap.
- **Prove classification accuracy.** Test classification on your real products before scaling, because a wrong tariff code drives wrong duty, delays, and penalties throughout the operation.
- **Embed compliance in the flow.** Integrate GTM into the order-to-ship process so screening and classification happen automatically, because a separate manual step gets bypassed under pressure.

A phased rollout

Sequence the program to retire risk early. Begin with your highest-risk trade lanes and your most important compliance need, screening or classification, verifying content coverage and integrating with the ERP, and proving the outputs are accurate. Then extend to more countries, add customs filing and duty and origin management, and broaden across the trade process. Treating these as sequential stages, rather than a single switch, is what separates a smooth rollout from a stalled one.

8. Trends shaping 2026

Tariff volatility as the megadrivers

The dominant force in 2026 is tariff volatility. The sharp 2025 increase in United States tariffs, and the trade responses it triggered, pushed duty to the top of the corporate agenda and made tariff-scenario modeling, the ability to see the cost impact of changing tariffs across products and lanes, a board-level capability rather than a specialist nicety. For exposed companies, trade cost is now a strategic variable, and GTM is where it is managed.

AI classification and content

AI is transforming the most labor-intensive parts of trade management: classifying products at scale and keeping content current. Thomson Reuters has built AI classification into ONESOURCE, e2open applies AI across its trade content, and others are following. Because classification and content are the foundation and the largest manual burden, AI that improves them is among the clearest near-term applications in the category.

Consolidation

The market is consolidating rapidly. WiseTech Global acquired e2open, Thomson Reuters acquired Pagero, and years of Descartes acquisitions have concentrated customs and content capability. This is bringing trade, logistics, and content together in fewer, larger platforms, and buyers should weigh the reach this creates against the integration risk and reduced choice that consolidation brings.

Convergence with logistics

The boundary between trade compliance and transportation is blurring, as platforms bring customs, trade content, and freight execution together. Thomson Reuters adding a transportation system and e2open combining trade with logistics both reflect a move toward managing the whole cross-border journey, compliance and movement, on one platform.

Reshoring and agentic frontiers

Tariff pressure and geopolitical risk are driving reshoring and friend-shoring, which reshape trade lanes and preferential-origin strategies and raise the value of modeling them in software. As across supply chain software, agentic AI is an emerging frontier, promising to act on trade data, screening, classifying, and filing, with less human effort, though it is early and demonstrated capability should be weighed over roadmap promises.

9. Segment-specific guidance

The right approach depends on your direction of trade and your footprint. The table summarizes where each segment usually starts; the prose adds the nuance.

Buyer profile	What matters most	Where to start
Large exporter	Export controls, licensing, content	e2open, Thomson Reuters, SAP GTS
Large importer / retailer	Customs, landed cost, origin	e2open, Descartes, Thomson Reuters
ERP-standardized enterprise	Integration, single vendor	SAP GTS, Oracle GTM
Customs-filing-intensive	Filing depth, country coverage	Descartes, QAD Precision, MIC
Tax-led cross-border	Duty and tax together	Vertex, Avalara

Large exporters need export controls, licensing, and deep content, the strength of the full platforms.

Large importers and retailers need customs, landed cost, and preferential origin, where the platforms and customs networks lead. **ERP-standardized enterprises** may reward an embedded module for integration. **Customs-filing-intensive businesses** reward the customs networks, and **tax-led companies** may start from the indirect-tax vendors extending into trade. The unifying rule is to match the platform to your direction of trade and country footprint first, then your systems.

10. ROI and the business case

The business case for global trade management has strengthened sharply with the rise in tariffs. The levers are lawful duty reduction, penalty and delay avoidance, faster customs clearance, and lower compliance-labor cost. The discipline is anchoring the case to your own trade volumes and duty exposure, while treating vendor figures as a ceiling.

Duty savings preferential origin and accurate classification lawfully reduce duty paid	Risk avoided screening and controls prevent penalties and prohibited transactions	Speed accurate filing clears goods faster and reduces border holds
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Where the value comes from

Most of the return comes from duty and risk. Accurate classification and disciplined use of free-trade agreements and preferential origin reduce the duty a company lawfully owes, and with tariffs elevated, that saving is larger than it has been in decades. Restricted-party screening and export controls prevent the penalties and reputational damage of prohibited transactions, which can dwarf the software cost. Faster, more accurate customs filing clears goods more quickly and reduces the cost of border holds, and AI-assisted classification cuts the compliance labor that trade traditionally demanded. Vendor and pilot figures cite meaningful reductions in customs-clearance time and compliance effort, but these are vendor-sourced and should be treated as a ceiling. The business case is strongest for companies with high trade volumes, complex products, and significant duty exposure, but the value should be modeled on your own classifications, lanes, and duty spend, with vendor figures used only to size the opportunity.

11. Frequently asked questions

What is global trade management software?

Software that automates the compliance, customs, and duty side of cross-border trade: classifying products, screening counterparties against restricted-party lists, determining controls and licenses, filing customs declarations, and managing duty, origin, and free-trade agreements. IDC defines it as supporting the trade compliance, logistics, and finance aspects of importing and exporting.

Isn't this the same as trade management software?

No, and this is a common confusion. Global trade management concerns customs and trade compliance. Financial trade management means securities and derivatives trading, and trade promotion management means consumer-goods trade spend. All three share the trade management name but are entirely different markets, which is why market figures must be read carefully.

How is GTM different from a TMS?

A transportation management system plans and executes the physical movement of freight; global trade management handles the compliance, customs, and duty of crossing borders. The two increasingly integrate, and some vendors now offer both, but they solve different problems and are evaluated on different criteria.

Is there a Gartner Magic Quadrant for GTM?

No. There is no dedicated Gartner Magic Quadrant for global trade management. The authoritative analyst benchmark is the IDC MarketScape, which in 2025 split into two assessments, one for manufacturers and exporters and one for retailers and importers, having combined them in 2022. e2open and Thomson Reuters were named Leaders in both.

Who are the leading vendors?

It depends on the tier. End-to-end trade platforms include e2open, now a WiseTech Global company, Thomson Reuters ONESOURCE, SAP GTS, and Oracle GTM; customs and filing networks include Descartes, QAD Precision, and MIC; tax and cross-border adjacencies include Vertex and Avalara; and specialists include OCR Services, 3CE, and Bamboo Rose.

How big is the market?

Credible 2025 estimates for global trade management software cluster near \$1.3B to \$1.5B, growing at roughly eight to eleven percent. Services-inclusive figures run higher, toward \$2.8B, and unrelated markets that share the trade management name inflate careless estimates further. The narrow software figures are the most defensible baseline.

Why does trade content matter so much?

Because the software runs on it. Behind GTM sits a constantly changing body of tariff schedules, duty rates, restricted-party lists, and regulations across more than two hundred countries. A stale tariff code or missed sanctions update is a compliance failure with legal and financial consequences, so content currency and coverage are central to any evaluation.

How are tariffs changing the picture?

Dramatically. The sharp 2025 rise in United States tariffs pushed the average effective rate to its highest since the 1930s and made duty a board-level cost. Tariff-scenario modeling, seeing the cost impact of changing tariffs across products and lanes, has become a strategic capability, sharply raising the urgency of getting trade management right.

What does it cost?

Pricing typically scales with the modules chosen, transaction or shipment volume, the number of countries, and trade-content subscriptions, with integration a significant implementation cost. A full platform for a global trader is a substantial commitment including ongoing content fees; a focused screening or classification tool is far lighter.

What is the most common reason these programs fail?

Incomplete or stale trade content, inaccurate classification, weak integration with ERP and logistics, and conflating import and export needs. Almost none of the common failures are about the interface. Verifying content coverage and proving classification accuracy first are the most important steps.

12. Recommendations

A practical path for buyers, drawn from the analysis above:

- 1. Exclude the name collisions when sizing.** Size the market on credible GTM software figures near \$1.3B to \$1.5B, and disregard financial trade management and trade-promotion figures that share the name but not the meaning.
- 2. Use the IDC MarketScape, not a quadrant.** Because there is no Gartner Magic Quadrant, lean on the two 2025 IDC MarketScapes, matched to whether you mainly export or import, plus references in your industry.
- 3. Make trade content the first test.** Verify current, complete content for every country and product you trade before anything else, because content currency is the foundation of correct, compliant outputs.
- 4. Prove classification on your own products.** Run a classification proof-of-concept, including AI, on your real goods, because a wrong tariff code drives wrong duty, delays, and penalties.
- 5. Build tariff-scenario capability.** Given elevated tariffs, prioritize the ability to model duty across products and lanes, because trade cost is now a strategic, board-level variable.
- 6. Treat ROI claims as a ceiling.** Model duty savings and penalty avoidance on your own volumes and exposure, and watch the consolidating vendor map as ownership shifts.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, the IDC MarketScape for global trade management, vendor disclosures, and trade reporting, current to mid-2026. Supply Chain Research is independent and accepts no payment from the vendors covered.
- Market-size figures are corrupted by two name collisions: global trade management (customs and compliance) is routinely confused with financial trade management (securities trading) and trade promotion management (consumer-goods trade spend). Credible GTM software figures cluster near \$1.3B to \$1.5B; services-inclusive figures run higher. Several sources are SEO-style market-research firms and are directional only.
- There is no Gartner Magic Quadrant for GTM; the authoritative benchmark is the IDC MarketScape, which split in 2025 into separate assessments for manufacturers and exporters and for retailers and importers. The landscape map in Figure 4 is our directional interpretation, not IDC coordinates.
- The tariff figures in Figure 3 are approximate, based on Yale Budget Lab and Tax Foundation estimates of the US average effective tariff rate; the 2025 figure is an estimate that moved through the year and is shown as directional. Duty-savings and ROI figures are vendor sourced and treated as a ceiling.
- Vendor ownership and scope change quickly, including WiseTech Global's acquisition of e2open and Thomson Reuters' acquisition of Pagero. Validate current details directly with vendors before any purchasing decision.

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Additional figures drawn from: Technavio and Grand View Research on trade management software sizing; vendor disclosures from e2open (Global Knowledge content updates and WiseTech acquisition), Thomson Reuters (ONESOURCE scale and Pagero acquisition), Descartes, QAD Precision, and MIC; and Tax Foundation estimates of the US average effective tariff rate. Duty-savings and ROI claims are vendor sourced unless otherwise noted, and there is no Gartner Magic Quadrant for GTM.

Supply Chain Research is an independent, vendor-neutral research platform for supply chain and IT leaders. We accept no payment from the vendors covered. Figures should be validated against your own requirements before any purchasing decision.