SUPPLY CHAIN RESEARCH

S&OP and IBP Platforms

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting sales and operations planning and integrated business planning software: what these systems do, how they differ from the broader planning suites, how the market and vendors stack up in 2026, what they cost, how to run the selection, and why process beats software.

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

Contents

1. Executive summary

Sales and operations planning software runs the monthly executive process that aligns demand, supply, and finance on a single plan. Integrated business planning, or IBP, is the financially integrated, more strategic evolution of that process, extending it beyond the supply chain to finance, commercial, and product. The software orchestrates the whole rhythm: building a consensus demand plan, balancing it against supply, reconciling it to the financial plan, running scenarios, and giving executives one view to decide from. This is not another operational planning tool. It is the layer that sits above demand planning, supply planning, and scheduling and ties them to the numbers the board cares about. In 2026 the category is being reshaped by AI, by the convergence of supply chain and financial planning, and by a hard truth that no software can escape: IBP succeeds or fails on process and executive sponsorship, not on the tool.

This guide is written for supply chain, finance, and operations leaders evaluating an S&OP or IBP investment, and for the teams who must run the process and integrate the data. 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 above all on whether your IBP is led by supply chain or by finance, and on your scale and industry. The pages that follow define the category, size the market honestly while flagging a fourfold conflation, profile the supply-chain-native, finance-led, and mid-market tiers, lay out an evaluation framework, and explain why native financial integration and, more than anything, executive process discipline, not the feature list, decide the return.

Process, not tool	Two lenses	9-18 months
IBP succeeds on executive sponsorship and rhythm, not on software	supply-chain-led and finance-led IBP are judged by different analyst reports	how long a genuine IBP rhythm takes to mature, not the three months some claim

What the evidence says

- **IBP is about process, not software.** The most consistent finding is that companies who deploy IBP without changing the executive operating model end up with software supporting a process that does not really exist.
- **The market has no clean size.** Narrow S&OP-software figures cluster near $2B to $3.4B, but broad figures fold in the whole supply chain planning market, and IBP overlaps the separately counted connected-planning market, a fourfold spread.
- **There is no S&OP/IBP Magic Quadrant.** Supply-chain-led IBP is assessed inside the Gartner Supply Chain Planning quadrant, while finance-led IBP is judged in financial-planning coverage, so the right analyst report depends on which side leads.
- **Native financial integration is the dividing line.** Many vendors claim IBP, but genuine IBP requires the operational plan to be natively integrated with finance, not bolted-on financial reporting.
- **Real IBP takes time.** A mature IBP rhythm takes roughly nine to eighteen months; vendors promising a three-month IBP are usually deploying advanced S&OP and calling it IBP.

2. What S&OP and IBP software is

S&OP and IBP software gives an organization one aligned plan and a disciplined process to maintain it. The core capabilities are:

- **Consensus demand planning.** Bringing sales, marketing, and operations to one agreed demand plan, rather than competing forecasts.
- **Supply and demand balancing.** Testing the demand plan against supply, capacity, and inventory, and surfacing the gaps that need decisions.
- **Scenario and what-if analysis.** Modeling alternatives, a demand shift, a supply disruption, a tariff change, and seeing the operational and financial impact of each.
- **Financial reconciliation.** Tying the operational plan to the financial plan so the numbers agree, the capability that distinguishes IBP from basic S&OP.
- **Executive review and assumptions.** Giving leaders one dashboard and a managed set of assumptions to review, decide, and commit against each cycle.

Why this is a layer, not a suite

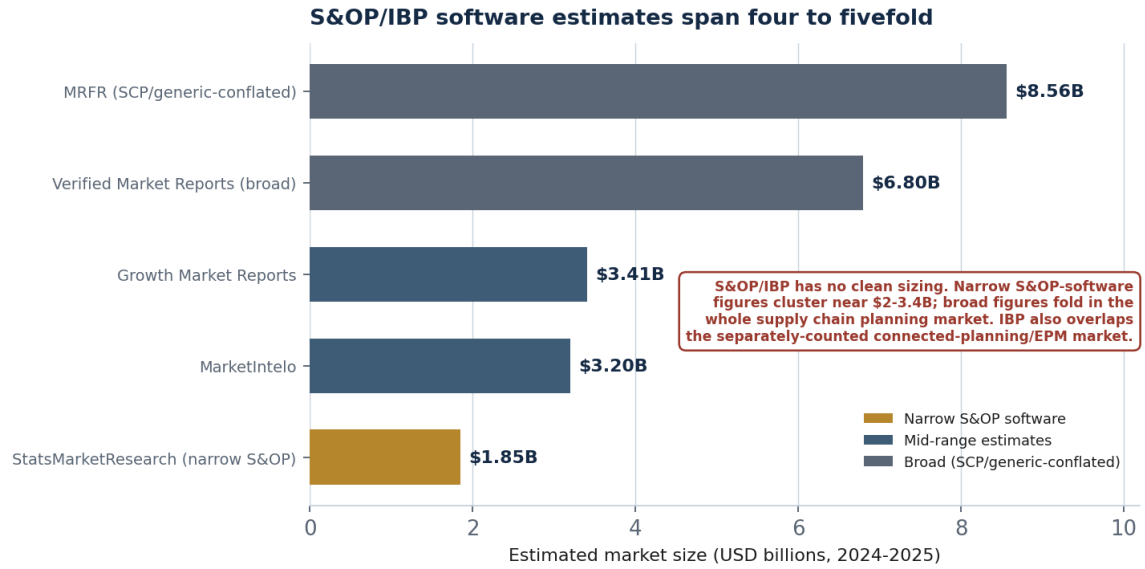
The single most important thing to understand about S&OP and IBP is that it is an orchestration layer, not an operational planning suite. Demand planning, supply planning, and production scheduling, covered elsewhere in this series, do the detailed operational work. S&OP and IBP sit above them, aligning those plans with each other and with finance, and driving the monthly executive rhythm in which the organization agrees one plan and commits to it. The value is not another optimization engine but cross-functional alignment and better decisions. This is also why the software is necessary but never sufficient: it supports a process that the organization itself has to run, with executive sponsorship, or the tool has nothing to orchestrate.

Layer	What it does	Relationship
Demand / supply planning	Detailed operational plans	Feeds IBP
S&OP / IBP	Aligns plans, drives the rhythm	Orchestrates
Financial planning (FP&A)	Budgets and financial plans	Reconciles with IBP
Execution	Runs the committed plan	Follows IBP

S&OP and IBP is distinct from the operational supply chain planning suites that generate the detailed plans, and from the financial planning and analysis tools that own the budget, though IBP deliberately spans both. The defining question, examined throughout this guide, is whether your IBP is led by supply chain or by finance, because that shapes everything from the vendor shortlist to the analyst report that applies.

3. The S&OP and IBP market in 2026

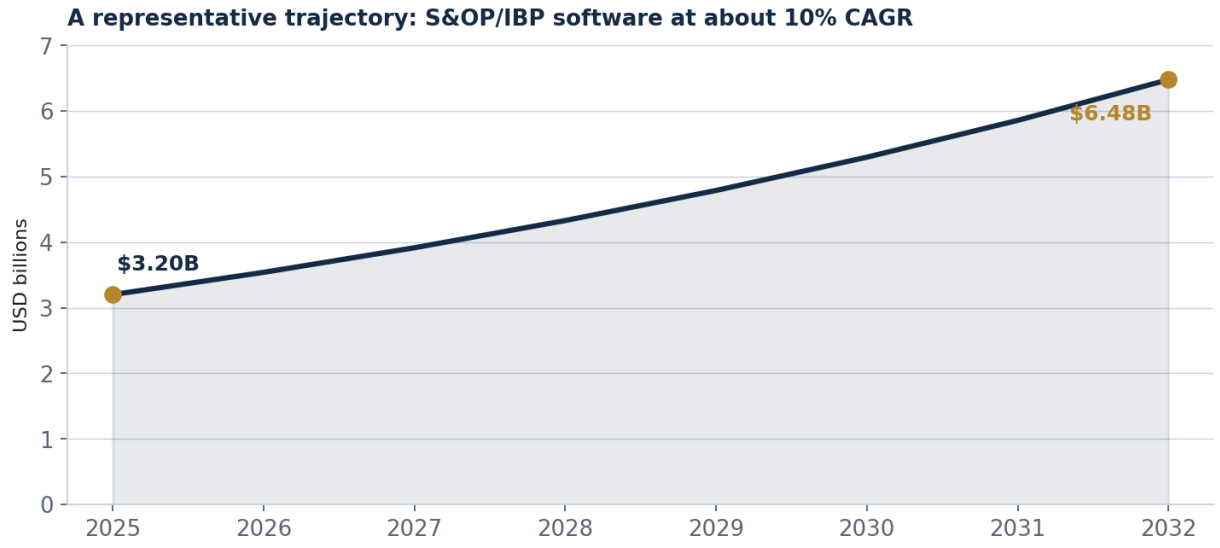
S&OP and IBP has one of the messiest sizing pictures in this series, because it can be counted at least three ways. Narrow sales-and-operations-planning software figures cluster near $2B to $3.4B; broad figures fold in the whole supply chain planning market and reach $6B to $8.5B; and because IBP overlaps the connected-planning and enterprise-performance-management market, some of it is counted there too. Treat the figures below as directional, and check what each one is counting.



Source: Supply Chain Research analysis of published 2024-2025 estimates. Broad figures conflate with supply chain planning or generic planning suites. SEO-style aggregators are directional only.

Figure 1. Published 2024 to 2025 estimates. Narrow S&OP-software figures cluster near $2B to $3.4B; broad figures conflate with the whole planning market.

Source and definition	Size	Forecast	CAGR
MRFR (SCP/generic-conflated)	$8.56B (2025)	$15.0B / 2035	5.8%
Verified Market Reports (broad)	$6.80B (2024)	$23.4B / 2033	14.8%
Growth Market Reports	$3.41B (2024)	$8.47B / 2033	10.6%
MarketIntelo	$3.20B (2024)	$8.70B / 2033	11.6%
StatsMarketResearch (narrow S&OP)	$1.85B (2025)	$3.05B / 2032	8.9%



Source: representative mid-range estimate at ~10.6% CAGR. Credible narrow estimates span roughly 9 to 12 percent; broad, conflated figures differ widely.

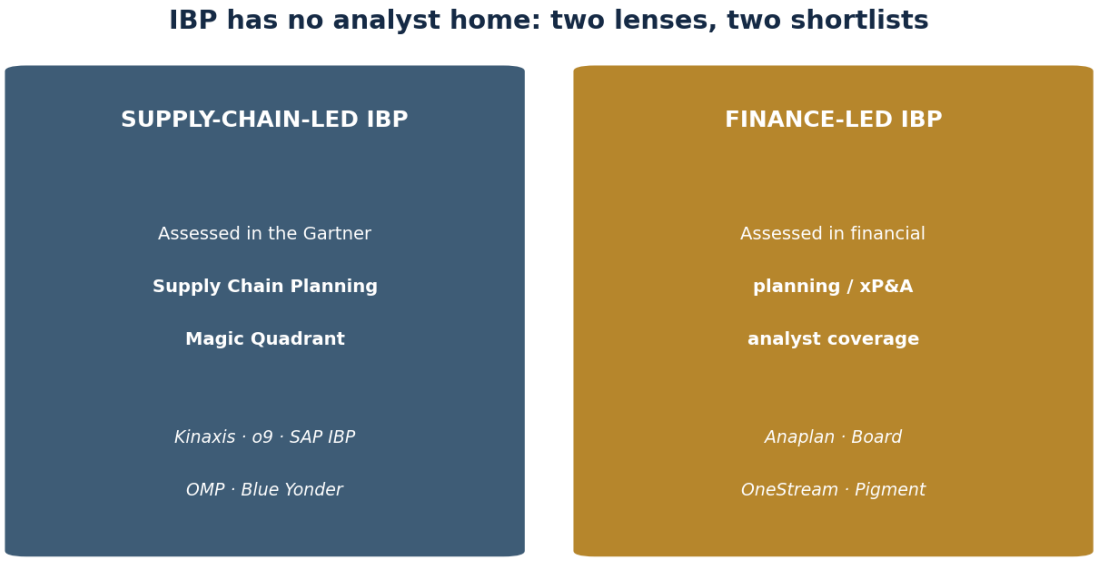
Figure 2. A representative trajectory for S&OP/IBP software at about 10 percent CAGR. Credible narrow estimates span roughly 9 to 12 percent.

Why the estimates diverge

The spread is definition. The narrowest figures count dedicated S&OP and IBP software; the broadest fold in the entire supply chain planning market, and some conflate further with generic enterprise planning. Because IBP straddles supply chain and finance, part of it is also captured in connected-planning and enterprise-performance-management sizing that is counted separately again. North America holds roughly 38 percent, Asia-Pacific is the fastest-growing, cloud deployment dominates, and manufacturing is the largest vertical. For planning, the narrow S&OP-software figures of around $2B to $3.4B are the most defensible baseline for the dedicated category, with the caveat that the boundary with both operational planning and financial planning is truly blurred.

Why the finance-versus-supply-chain question comes first

The most useful lens on this market is not size but orientation. Because IBP joins operational and financial planning, every buyer must first decide whether their IBP is led by supply chain, with finance as a peer, or led by finance, with supply chain as an input, illustrated in Figure 3. That single decision determines which vendors fit and, revealingly, which analyst report applies: supply-chain-led IBP is assessed in supply chain planning coverage, finance-led IBP in financial-planning coverage. The category, in other words, has no single home, and buyers must know which door they are entering.



The first question is whether your IBP is led by supply chain or by finance. It changes both which vendors fit and which analyst report applies.

Figure 3. The defining question. Whether IBP is led by supply chain or by finance changes both the vendor shortlist and the analyst report that applies.

4. The vendor landscape

The S&OP and IBP market spans supply-chain-native platforms, finance-led connected-planning platforms, and mid-market integrated tools. We group vendors into four tiers by what they do best, not by size. No vendor leads every tier, and the same platform can be a strong choice or a poor one depending entirely on whether your IBP is led by supply chain or by finance.

What the analysts say

The analyst picture here is truly split. The essentials:

- **There is no standalone S&OP or IBP Magic Quadrant.** Neither exists as a dedicated ranked grid, so buyers must look to whichever adjacent coverage matches their orientation.
- **Supply-chain-led IBP is assessed in the SCP quadrant.** Gartner evaluates it inside the Magic Quadrant for Supply Chain Planning Solutions, which it split in 2026 into Discrete and Process editions, with Kinaxis, o9, SAP, Blue Yonder, and OMP among the Leaders.
- **Finance-led IBP is assessed in financial-planning coverage.** Anaplan, Board, and OneStream come from the connected-planning and financial-planning side and are judged there, with Anaplan also recognized in supply chain planning buyer guides.

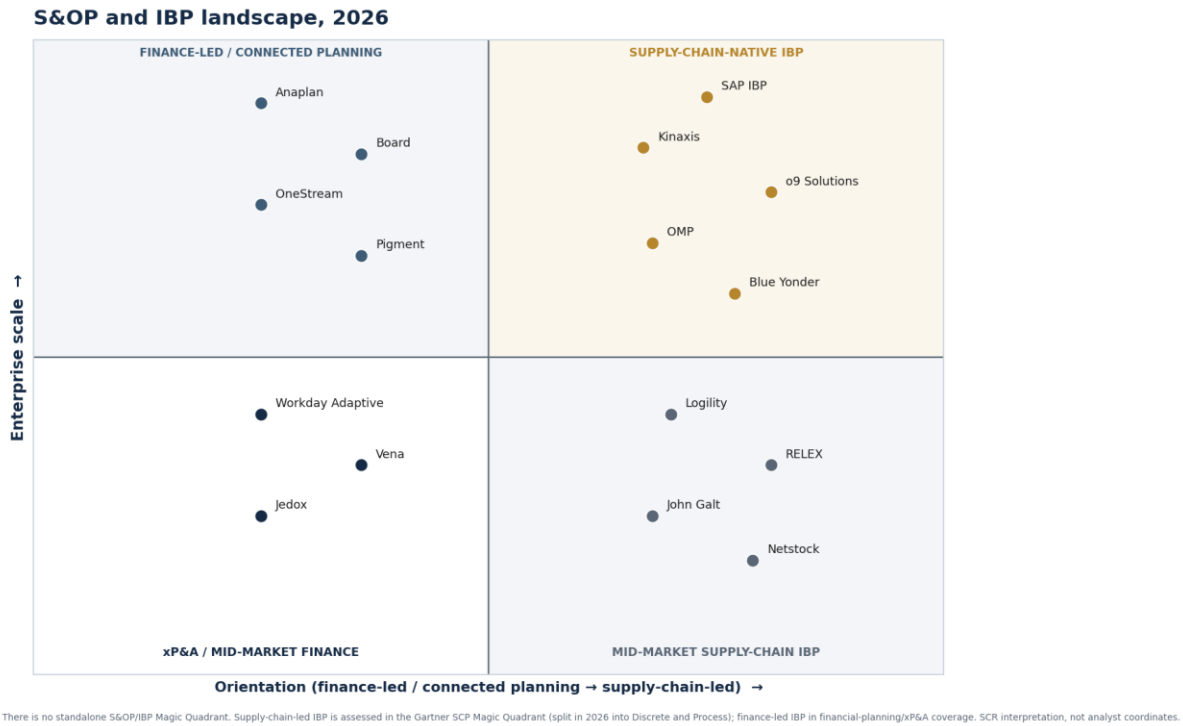


Figure 4. Supply Chain Research's directional map. There is no S&OP/IBP quadrant; these positions are our interpretation, not analyst coordinates.

Supply-chain-native IBP

These vendors approach IBP from operational supply chain strength, with finance as a peer. SAP IBP, used by more than a thousand companies and built on SAP HANA, natively spans S&OP, demand, supply, inventory, and response. Kinaxis, through its Maestro platform, is known for a concurrent-planning

engine that recalculates scenarios rapidly. o9 Solutions applies a knowledge-graph Digital Brain and was the only vendor named a Gartner Peer Insights Customers' Choice for supply chain planning. OMP, with Unison Planning, is strong in process industries, and Blue Yonder and Oracle extend S&OP within broader suites. Strengths: operational depth and scenario power. Limitations: they are enterprise commitments, and finance integration, while improving, is a peer rather than the origin.

Finance-led and connected planning

These vendors approach IBP from financial and connected planning. Anaplan, owned by Thoma Bravo, uses a hyperblock calculation engine to connect finance, sales, and operations planning, and is a common choice where IBP is led by finance. Board and OneStream bring strong financial planning and consolidation to connected planning, and Pigment is a newer entrant. Strengths: native financial depth and cross-functional modeling flexibility. Limitations: they are lighter on operational supply chain depth, detailed scheduling and multi-echelon optimization, and often sit as a planning layer over operational tools.

Mid-market integrated

A third group serves the mid-market with integrated planning at lower cost and faster deployment. Logility and RELEX pair planning breadth with S&OP capability, John Galt's Atlas Planning targets mid-sized manufacturers, and Netstock brings accessible planning to smaller companies. On the finance side, Workday Adaptive, Vena, and Jedox serve mid-market connected planning. Strengths: time-to-value and lower total cost. Limitations: less depth than the enterprise platforms on either the operational or the financial side.

Vendor summary

Vendor	Tier	Best fit	Notes
SAP IBP	Supply-chain-native	SAP-centric enterprises	1,000+ companies; native S&OP
Kinaxis	Supply-chain-native	Concurrent scenario planning	SCP MQ Leader; Maestro
o9 Solutions	Supply-chain-native	AI-driven end-to-end IBP	Knowledge graph; Customers' Choice
OMP / Blue Yonder / Oracle	Supply-chain-native	Process and suite-embedded IBP	Strong in specific industries
Anaplan	Finance-led / connected	Finance-led IBP	Thoma Bravo-owned; hyperblock
Board / OneStream / Pigment	Finance-led / connected	Connected finance and ops	Strong financial integration
Logility / RELEX	Mid-market integrated	Mid-market planning plus S&OP	Lower TCO than the enterprise tier
John Galt / Netstock	Mid-market integrated	Mid-sized and smaller firms	Accessible, faster to deploy

Positions and notes are Supply Chain Research's interpretation from public information, the Gartner Supply Chain Planning quadrant, and financial-planning coverage, current to mid-2026. There is no standalone S&OP/IBP quadrant. Ownership and scope change quickly; verify current details directly with each vendor.

5. How to evaluate an S&OP/IBP platform

The differentiators in S&OP and IBP are orientation fit, native financial integration, and, above all, whether the platform will support a real executive process, more than the headline feature list. We use five dimensions.

The five evaluation dimensions

1. **Orientation fit.** Is your IBP led by supply chain or by finance, and does the platform match? This is the first and most decisive question, because it reshapes the entire shortlist.
2. **Native financial integration.** Does the platform integrate the operational plan with finance natively, or does it bolt on financial reporting? Genuine IBP requires the former.
3. **Scenario and modeling power.** How quickly and flexibly can it model alternatives across demand, supply, and finance, since scenario analysis is the heart of a good IBP cycle?
4. **Process support and usability.** Does it support the monthly executive rhythm, assumptions, gaps, and decisions, in a way people will actually use, since the process is the point?
5. **Integration, AI, and viability.** Assess how it connects to your operational planning and ERP systems, its AI and forecasting, and the vendor's stability over a long planning commitment.

Making the decision

Match the platform to your orientation and scale. Companies whose IBP is led by supply chain, with finance as a peer, reward the supply-chain-native platforms such as SAP IBP, Kinaxis, o9, and OMP. Companies whose IBP is led by finance reward the connected-planning platforms such as Anaplan, Board, and OneStream. Mid-market companies reward the integrated mid-market tools. But whichever you choose, remember that the platform supports a process you must run, and validate that fit on your own planning rhythm.

A selection process that works

6. Decide whether your IBP is led by supply chain or by finance, and shortlist accordingly.
7. Test native financial integration, not bolted-on reporting, against a real reconciliation.
8. Run a scenario exercise on your own data, across demand, supply, and finance.
9. Confirm the platform supports your intended executive rhythm and that leaders will use it.
10. Probe integration with your operational planning and ERP systems, and check references at your scale.

6. Cost and pricing

S&OP and IBP pricing typically scales with users, modules, and scope, and enterprise platforms carry seven-figure total cost of ownership with long implementations. The models you will encounter:

Pricing model	Typical basis	Notes
Per user / subscription	Users and modules	Enterprise TCO often $1M+ annually
Platform license	Scope and scale	Large enterprises, multi-year
Mid-market subscription	Tiered	Lower cost, faster deployment
Within a suite	Part of SCP or ERP cost	SAP IBP, Oracle, Blue Yonder
Implementation	Project fee	Often larger than the license

What drives the number

Users, modules, scope, and scale are the main cost drivers, and implementation, which for enterprise IBP commonly runs twelve to twenty-four months, is often larger than the license. Enterprise platforms carry seven-figure annual total cost of ownership; mid-market tools deploy in six to twelve months at materially lower cost. The most expensive mistake in this category is not a pricing error but a scoping one: buying enterprise IBP and deploying it as software without changing the executive operating model, which produces a costly system supporting a process that does not exist. Model the full cost, including the multi-year implementation and the organizational change, not the license alone.

S&OP and IBP pricing is gated behind a sales process and depends heavily on scope and scale, so published figures should be treated as starting points. Build a process-fit assessment and a reference check into the buying process to validate both cost and the planning benefits the vendor projects, and be wary of vendors who promise a mature IBP rhythm in a few months.

7. Implementation: where programs succeed or fail

S&OP and IBP programs fail in predictable ways, and the failures are overwhelmingly about process and people, not the interface. The recurring causes:

- **The executive operating model does not change.** This is the dominant failure. If leaders do not commit to the monthly rhythm and the discipline of one plan, the software supports a process that does not really exist, and the investment is wasted.
- **Advanced S&OP is mistaken for IBP.** If the program deploys operational planning and calls it IBP without native financial integration, it never delivers the financial alignment that defines IBP.
- **Timelines are unrealistic.** If a mature IBP rhythm is expected in three months, the program disappoints; genuine IBP maturity takes roughly nine to eighteen months of process and behavior change.
- **Integration and data are underestimated.** If the platform is not fed clean, integrated data from operational planning and finance, the plans it produces are not trusted, and adoption stalls.

Three principles that separate success from failure

- **Change the operating model first.** Secure executive sponsorship and commit to the monthly rhythm before the software, because IBP is a process the organization runs, not a tool it installs.
- **Insist on native financial integration.** Require the operational plan to be natively tied to finance, because bolted-on financial reporting is advanced S&OP, not IBP.
- **Plan for a multi-quarter maturity curve.** Expect nine to eighteen months for the rhythm to mature, because the value comes from sustained behavior change, not a software go-live.

A phased rollout

Sequence the program around the process, not the software. Begin by establishing the executive rhythm and a disciplined S&OP cycle with real sponsorship, integrating the operational and financial data that feed it. Then layer in native financial reconciliation to move from S&OP toward IBP, add scenario planning and longer horizons, and extend across business units. Treating these as sequential stages of process maturity, rather than a single software switch, is what separates a smooth rollout from an expensive shelfware disappointment.

8. Trends shaping 2026

AI forecasting and scenario planning

The dominant trend is AI and machine learning applied to forecasting and scenario analysis: better demand forecasts, automated outlier correction, and faster what-if modeling across demand, supply, and finance. SAP, Kinaxis, o9, and Anaplan are all embedding AI, and because scenario analysis is the heart of a good IBP cycle, AI that accelerates it is among the clearest near-term applications in the category.

Convergence of supply chain and financial planning

The defining structural trend is the convergence of supply chain planning and financial planning, sometimes called extended planning and analysis. This is the original promise of IBP, one plan across operations and finance, finally being enabled by platforms strong enough on both sides. It is also why the category has no single analyst home, and why the finance-versus-supply-chain orientation question is becoming central to every evaluation.

The discrete and process split

On the supply chain side, Gartner's 2026 split of the Supply Chain Planning Magic Quadrant into Discrete and Process editions is reshaping how supply-chain-led IBP is assessed, formalizing that process industries and discrete industries have different planning needs and different strongest vendors. Buyers of supply-chain-led IBP should read the edition that matches their industry.

Consolidation

The market is consolidating, with Thoma Bravo's ownership of Anaplan a prominent example and private-equity interest across the enterprise-planning ecosystem, as fragmented niche vendors present roll-up opportunities. Buyers should weigh the scale and investment this can bring against the disruption and roadmap uncertainty that ownership changes sometimes create.

Volatility, tariffs, and agentic frontiers

Persistent volatility, from demand swings to tariff shocks, is driving demand for rapid scenario planning, the ability to see the operational and financial impact of a disruption quickly. As across supply chain software, agentic AI is an emerging frontier, promising to run parts of the planning cycle with less human effort, though it is early and, in a category defined by executive judgment, demonstrated capability should be weighed over roadmap promises.

9. Segment-specific guidance

The right approach depends first on orientation, then on industry and scale. The table summarizes where each segment usually starts; the prose adds the nuance.

Buyer profile	What matters most	Where to start
Supply-chain-led enterprise	Operational depth, scenarios	SAP IBP, Kinaxis, o9
Finance-led enterprise	Native financial integration	Anaplan, Board, OneStream
Process industry	Recipe, yield, process rhythm	OMP, SAP IBP, Kinaxis
Discrete / CPG	Broad discrete planning	Kinaxis, o9, Blue Yonder, RELEX
Mid-market	Time-to-value, lower TCO	Logility, RELEX, John Galt, Netstock

Supply-chain-led enterprises reward the operational depth and scenario power of the supply-chain-native platforms. **Finance-led enterprises** reward native financial integration, where the connected-planning platforms lead. **Process industries** reward vendors strong in recipe and yield planning such as OMP, and should read the process edition of the planning quadrant. **Discrete and CPG companies** reward the broad discrete planners, and **mid-market companies** reward time-to-value and lower cost. The unifying rule is to fix your orientation first, then match industry and scale.

10. ROI and the business case

The business case for S&OP and IBP is real but earned through process, not switched on by software. The levers are better forecast accuracy, lower inventory, improved service, faster response to disruption, and greater financial predictability. The discipline is recognizing that these come from the discipline of the process the software supports, and modeling them on your own operation.

Forecast	Inventory	Agility
aligned, consensus planning improves forecast accuracy	better balancing reduces inventory while protecting service	one plan and fast scenarios speed response to disruption

Where the value comes from

Most of the return comes from alignment and agility. A disciplined consensus process improves forecast accuracy, and better balancing of demand and supply reduces inventory while protecting service levels, the classic S&OP payoff. Tying the plan to finance improves the predictability of the numbers the board commits to, and rapid scenario analysis speeds response to disruption. Vendor and industry figures cite forecast-accuracy improvements of roughly fifteen to twenty percent and materially faster response to disruption, but these are vendor and aggregator-sourced and should be treated as a ceiling, and, crucially, they are realized only where the process discipline is real. The business case is strongest for companies with complex, volatile demand and poor cross-functional alignment today, but the value should be modeled on your own forecast error, inventory, and service, with vendor figures used only to size the opportunity, and with the sober understanding that the software is a necessary enabler of a benefit the organization has to earn.

11. Frequently asked questions

What is S&OP and IBP software?

Software that runs the executive process aligning demand, supply, and finance on one plan. Sales and operations planning is the core monthly rhythm; integrated business planning is the financially integrated, more strategic evolution of it, extending beyond the supply chain to finance, commercial, and product. The software orchestrates consensus demand, supply-demand balancing, scenario analysis, financial reconciliation, and executive review.

How is IBP different from S&OP?

IBP extends S&OP. S&OP aligns demand, supply, and operations; IBP integrates that operational plan natively with finance and broadens it to commercial and product, making it more strategic and financially rigorous. In software terms, native financial integration is the dividing line: bolted-on financial reporting is advanced S&OP, not true IBP.

How is this different from supply chain planning software?

Demand planning, supply planning, and scheduling do the detailed operational work; S&OP and IBP sit above them, aligning those plans with each other and with finance and driving the executive rhythm. It is an orchestration layer, not another operational engine, which is why it is necessary but never sufficient on its own.

Is there a Gartner Magic Quadrant for S&OP or IBP?

No standalone one. Supply-chain-led IBP is assessed inside the Gartner Magic Quadrant for Supply Chain Planning Solutions, which split in 2026 into Discrete and Process editions. Finance-led IBP is judged in financial-planning and connected-planning coverage. The right report depends on whether your IBP is led by supply chain or by finance.

Who are the leading vendors?

It depends on orientation. Supply-chain-native platforms include SAP IBP, Kinaxis, o9, OMP, Blue Yonder, and Oracle; finance-led connected-planning platforms include Anaplan, Board, and OneStream; and mid-market integrated tools include Logility, RELEX, John Galt, and Netstock. The same platform can be a great or a poor fit depending on which side leads.

How big is the market?

There is no clean figure. Narrow S&OP-software estimates cluster near $2B to $3.4B; broad figures fold in the whole supply chain planning market and reach $6B to $8.5B; and because IBP overlaps connected planning, part of it is counted there too. The narrow figures are the most defensible baseline for the dedicated category.

Why is IBP said to be about process, not software?

Because the value comes from the executive rhythm and the discipline of one plan, which the software supports but cannot create. The most consistent finding in this category is that companies who deploy IBP without changing the executive operating model end up with software supporting a process that does not really exist. Sponsorship and process come first.

How long does IBP take to implement?

A mature IBP rhythm typically takes roughly nine to eighteen months, because it is a process and behavior change, not just a software deployment. Enterprise platform implementations often run twelve to twenty-four months. Vendors promising a three-month IBP are usually deploying advanced S&OP and calling it IBP.

What does it cost?

Pricing scales with users, modules, scope, and scale. Enterprise platforms commonly carry seven-figure annual total cost of ownership with multi-year implementations often larger than the license; mid-market tools deploy in six to twelve months at materially lower cost. The costliest mistake is scoping enterprise IBP without committing to the process change it requires.

What is the most common reason these programs fail?

An executive operating model that does not change, advanced S&OP mistaken for IBP, unrealistic timelines, and underestimated integration and data work. Almost none of the common failures are about the interface. Changing the operating model first and insisting on native financial integration are the most important steps.

12. Recommendations

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

11. **Fix your orientation before anything else.** Decide whether your IBP is led by supply chain or by finance, because that single choice reshapes the vendor shortlist and determines which analyst report applies.
12. **Commit the executive operating model.** Secure sponsorship and the monthly rhythm before the software, because IBP is a process the organization runs, and no tool can substitute for that commitment.
13. **Insist on native financial integration.** Require the operational plan to be natively tied to finance, because that integration is what distinguishes real IBP from advanced S&OP with financial reporting attached.
14. **Use the analyst report that matches your side.** Because there is no S&OP/IBP quadrant, read the supply chain planning coverage for supply-chain-led IBP and financial-planning coverage for finance-led IBP.
15. **Plan for a multi-quarter maturity curve.** Budget nine to eighteen months for the rhythm to mature, and treat vendor promises of a three-month IBP with skepticism.
16. **Treat ROI claims as a ceiling.** Model forecast, inventory, and service benefits on your own operation, and remember they are realized only where the process discipline is real.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, the Gartner Magic Quadrant for Supply Chain Planning Solutions, financial-planning and connected-planning coverage, vendor disclosures, and practitioner guidance, current to mid-2026. Supply Chain Research is independent and accepts no payment from the vendors covered.
- Market-size figures diverge roughly fourfold to fivefold by definition, between narrow S&OP software (around $2B to $3.4B), broad figures that fold in the whole supply chain planning market (around $6B to $8.5B), and overlap with the separately counted connected-planning market. We present a range and treat the narrow figures as the most defensible baseline. Several sources are SEO-style market-research firms and are directional only.
- There is no standalone S&OP or IBP Magic Quadrant. Supply-chain-led IBP is assessed inside the Gartner Supply Chain Planning quadrant, split in 2026 into Discrete and Process; finance-led IBP is judged in financial-planning coverage. The landscape map in Figure 4 is our directional interpretation, not analyst coordinates.
- The finance-versus-supply-chain framing in Figure 3, the maturity-timeline and process-primacy points, and the distinction between advanced S&OP and true IBP draw on established practitioner and analyst guidance. Forecast-accuracy and ROI figures are vendor or aggregator-sourced and treated as a ceiling.
- Vendor ownership and scope change quickly, including Thoma Bravo's ownership of Anaplan. Validate current details directly with vendors before any purchasing decision.

14. Sources

[1] Gartner. Supply Chain Planning Solutions reviews and Magic Quadrant coverage.

[2] SAP. SAP Integrated Business Planning for Supply Chain. 1,000+ companies.

[3] Anaplan. Integrated Business Planning application.

[4] Stats Market Research (2025). Sales and Operations Planning (S&OP) Software Market (narrow). $1.85B (2025), 8.9% CAGR.

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[6] MarketIntelo (2025). Sales and Operations Planning Software Market. $3.20B (2024), 11.6% CAGR.

[7] Verified Market Reports (2025). Sales and Operations Planning (S&OP) Software Market (broad). $6.8B (2024), 14.8% CAGR.

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Additional figures drawn from: DataIntelo and MRFR on S&OP software sizing; Gartner Peer Insights (o9 as the only Customers' Choice for supply chain planning) and the ISG Buyers Guide (Anaplan as an Exemplary Leader); and vendor disclosures from SAP, Kinaxis, o9, Anaplan, Board, and OneStream. Forecast-accuracy and ROI claims are vendor or aggregator-sourced unless otherwise noted, and there is no standalone S&OP/IBP Magic Quadrant.

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.