

Order Management Systems

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting an order management system: what an OMS does, how the market and vendors stack up in 2026, what it costs, how to run the selection, and how to de-risk the implementation.

Prepared by **Supply Chain Research** · June 2026 · Vendor-neutral: we take no payment from the vendors covered.

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1. Executive summary

An order management system (OMS) has become the orchestration layer of modern commerce: the software that sits between every sales channel and every fulfillment node and decides where and how each order is sourced, routed, and fulfilled. As Nucleus Research put it in April 2026, order management has become the execution layer for modern commerce. For retailers and brands running omnichannel fulfillment, buy-online-pickup-in-store (BOPIS), ship-from-store, and rising return volumes, the OMS is now the system that determines whether a promise made at checkout is profitably kept.

This guide is written for supply chain and operations executives and the IT leaders who must live with the integration and the roadmap. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best OMS, because the right system is a function of your operating profile, not a leaderboard. The leading platforms have converged toward functional parity on core capabilities, so the real decision turns on fit, architecture, cost truth, and execution discipline rather than feature checklists. The pages that follow define the category, size the market honestly, profile the vendor landscape in detail, lay out an evaluation framework you can act on, and explain how to keep the implementation from joining the long list of enterprise programs that miss their targets.

~\$4B+ core OMS software market in 2026, growing at a low-double-digit CAGR (multiple research firms)	Lone Leader Manhattan Associates in Forrester's Order Management Systems Wave, Q1 2025	~50% of an OMS program is integration work alone (Fluent Commerce)
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What the evidence says

The leaders are clear, but the field is competitive. Forrester named Manhattan Associates the lone Leader in its Order Management Systems Wave (Q1 2025); Nucleus Research's 2026 Value Matrix is broader, naming five Leaders: Blue Yonder, Fluent Commerce, KBRW, Kibo, and Manhattan. The two evaluations use different methods and are not directly comparable.

Market sizing is unreliable and definition-dependent. Published 2025-26 estimates range from roughly \$2.95B to \$9.6B depending on how the category is drawn (narrow order-management software, broad multichannel order management, or logistics order management), though firms broadly agree on a low-double-digit CAGR of about 8 to 13 percent.

Implementation, not licensing, decides success. Integration work alone accounts for roughly half of OMS projects, and enterprise-software analogs show most large programs miss budget or timeline. Configurability, integration discipline, and a phased rollout matter more than anything on a feature sheet.

AI and convergence define 2026. Agentic AI, composable (MACH) architecture, and the merging of B2C and B2B order management are the dominant themes, alongside continued consolidation: Bain Capital's investment in Fluent, Sage's acquisition of Brightpearl, and private-equity backing of Cin7 and Linnworks.

Buy, do not build, and stage the rollout. Mature SaaS options have made custom OMS builds hard to justify on cost or risk. Shortlist three to five vendors by fit, score them against the same weighted criteria, and sequence the deployment from core orchestration outward.

2. What an OMS is and what it does

An OMS manages the full lifecycle of a customer order: capture, validation, inventory allocation, sourcing and routing, fulfillment, delivery tracking, returns, and customer-service visibility, across every channel a business sells through. The dominant 2026 framing is that the OMS is the orchestration layer, or central nervous system, of unified commerce. It sits upstream of the warehouse and downstream of the storefront, decides *what to do* with an order once it is placed, and then hands execution to a WMS, a TMS, or a third-party logistics provider. A useful one-line test: the storefront takes the order, the OMS decides how to keep the promise, and the warehouse and carrier carry it out.

The order lifecycle the OMS manages

Behind a single checkout click, a capable OMS runs a sequence of decisions in real time:

- **Capture and normalize** orders from web, mobile, marketplace, social, POS, and call-center channels into one consistent format.
- **Validate and screen** for fraud, address quality, payment authorization, and promotion or pricing rules before the order is committed.
- **Determine availability** against a single network-wide view of inventory (available-to-promise and available-to-ship) spanning distribution centers, stores, suppliers, and in-transit stock.
- **Source and route** each line to the optimal node using rules and, increasingly, machine learning that weigh proximity, cost, capacity, inventory health, and service-level commitments, while minimizing costly split shipments.
- **Orchestrate fulfillment** across ship-from-DC, ship-from-store, BOPIS, curbside, same-day, endless aisle, and drop-ship, releasing work to the right system.
- **Track, expose, and recover** order status to customers and service agents, manage exceptions and modifications, and process returns, exchanges, and settlement through the same orchestration layer.

Core capabilities

- **Order orchestration:** rule-based, hierarchical routing and allocation configured by channel, customer, geography, cost, and service level, so the same platform can behave differently for a marketplace order than for a loyalty member's BOPIS pickup.
- **Distributed Order Management (DOM):** the intelligent sourcing engine. Gartner describes DOM as the software that orchestrates and optimizes fulfillment using inventory across the supply-chain network to hit targeted fill-rate and on-time service levels at optimal cost.
- **Real-time inventory and ATP:** a single, accurate, network-wide picture of what can be promised and shipped, the foundation on which every routing and availability decision depends.
- **Sourcing and routing optimization:** best-node selection with split-shipment minimization, order consolidation, and capacity-aware balancing across stores and DCs.
- **Fulfillment and store fulfillment:** BOPIS, curbside, ship-from-store, same-day, endless aisle, and drop-ship, with task management for store associates.
- **Returns and reverse logistics:** routing, disposition, restocking, and fraud screening handled inside the same platform rather than bolted on.

- **Customer-service visibility, payment and fraud, and omnichannel enablement** round out the platform, giving agents a 360-degree order view and customers consistent experience and inventory across every channel.

How an OMS differs from adjacent systems

Category confusion is a common source of buying mistakes, and it is worth being precise. The OMS decides where and how an order is fulfilled; the surrounding systems execute the work. Many of the failed omnichannel programs of the past decade began with an attempt to stretch an ERP or a commerce platform to do orchestration it was never designed for.

System	What it owns	Relationship to the OMS
ERP	Finance, procurement, and the back-office system of record	Complements the OMS; ERPs were not built for real-time, distributed omnichannel orchestration
WMS	Physical work inside the four walls of a warehouse	Executes what the OMS decides; the OMS tells other systems what stock should move
Commerce engine	Product discovery, cart, and checkout (the storefront)	The OMS owns everything after the buy button
POS	In-store transactions	Increasingly unified with the OMS through combined OMS and POS platforms
CRM	Customer relationships and data	Some OMS platforms differentiate on native CRM and service integration
TMS	Carrier selection and freight movement	The OMS requests shipments; the TMS runs them
Inventory system	Stock levels and adjustments	The OMS adds cross-channel orchestration and ATP logic on top of raw stock data

Basic OMS versus distributed order management

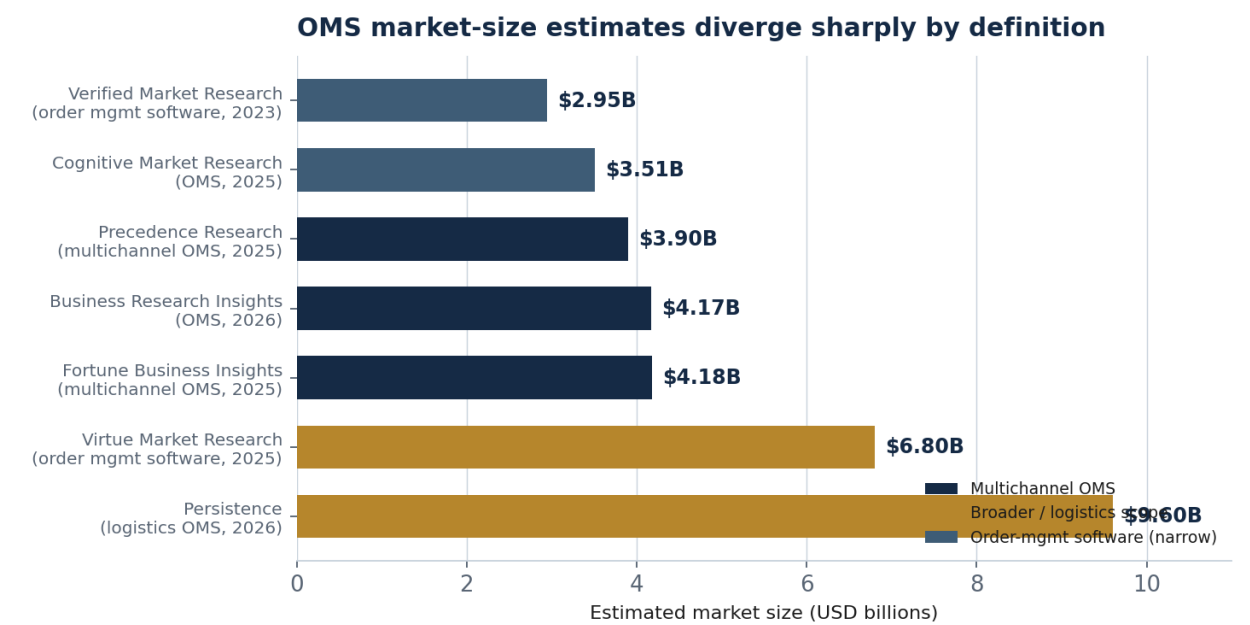
Not every order-management tool is a DOM. A basic OMS routes orders to a predefined warehouse and tracks their status. A DOM is cloud-based, channel-aware, and rule-driven: it tracks the customer's point of interaction and dynamically routes each order to the optimal node, supporting split and merge, BOPIS, and ship-from-store. The practical dividing line is network complexity. If you fulfill from multiple nodes, sell across multiple channels, and offer store-based fulfillment, a single-node OMS will break under the load, and a true DOM becomes necessary rather than optional.

Composable, MACH, and headless architecture

Under composable, or MACH, principles (Microservices, API-first, Cloud-native, Headless), the OMS becomes a discrete, independently deployable business capability rather than a module locked inside a monolith. Vendors such as Fluent Commerce, Kibo, fabric, and Blue Yonder market composable, API-first OMS architectures that let a retailer replace or upgrade order management without re-platforming the entire stack. The benefit is flexibility and speed of change; the cost is integration overhead. A fully composable stack can require twenty or more discrete API integrations to build and maintain, which demands real API governance, DevOps maturity, and observability. The right answer is rarely all-or-nothing: many organizations adopt a composable OMS while leaving other layers in a suite, and add modularity only where the flexibility earns its keep.

3. The OMS market in 2026

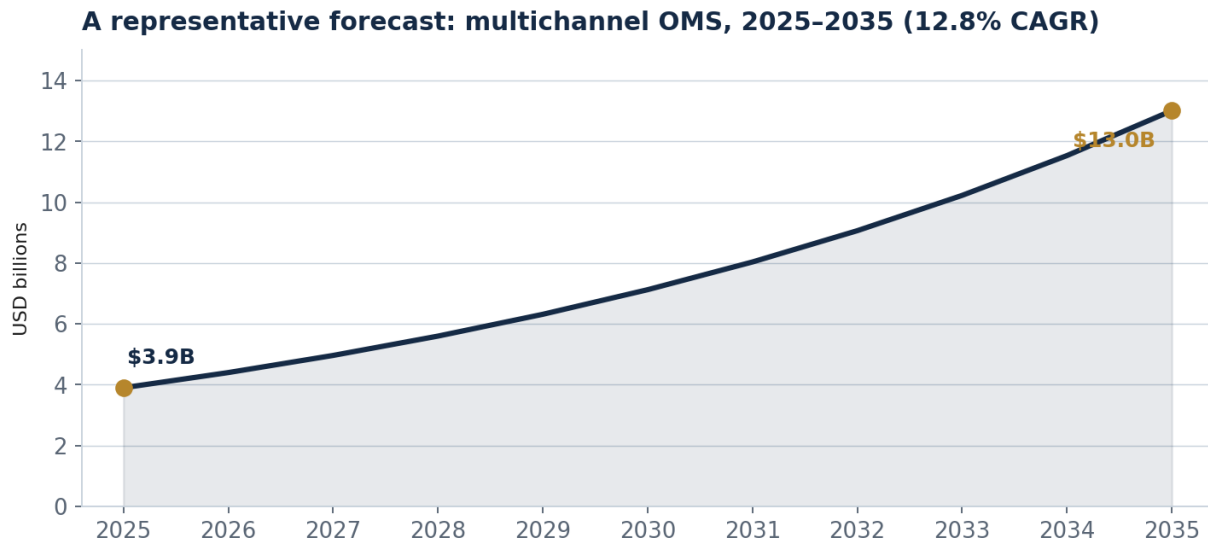
The OMS market is large, growing quickly, and consolidating, but sizing it precisely is difficult because research firms define the category differently. Narrow order-management software, broader multichannel order management, and logistics order management each produce widely different numbers, and several of the firms publishing estimates do not disclose their methodology. Treat the figures below as directional, and anchor on the consensus growth rate rather than any single dollar value.



Source: Supply Chain Research analysis of published market-research estimates, 2023-2026. Figures vary by category definition.

Figure 1. Published OMS market-size estimates, 2023-2026. The spread reflects differing category definitions, not measurement error.

Research firm	Segment named	2025/26 size	Forecast	CAGR
Precedence Research	Multichannel OM	\$3.90B (2025)	\$13.01B / 2035	12.8%
Fortune Business Insights	Multichannel OM	\$4.18B (2025)	\$11.34B / 2034	12.2%
Business Research Insights	OMS	\$4.17B (2026)	\$9.3B / 2035	9.2%
Cognitive Market Research	OMS	\$3.51B (2025)	\$9.02B / 2033	12.5%
Verified Market Research	OM software	\$2.95B (2023)	\$3.17B / 2030	5.5%
Virtue Market Research	OM software	\$6.80B (2025)	\$10B / 2030	8.0%
Persistence Mkt. Research	Logistics OM	\$9.6B (2026)	\$15.7B / 2033	7.3%



Source: Precedence Research, 2025 (illustrative of the low-double-digit CAGR most firms cite). Other firms estimate 5.5–12.8%.

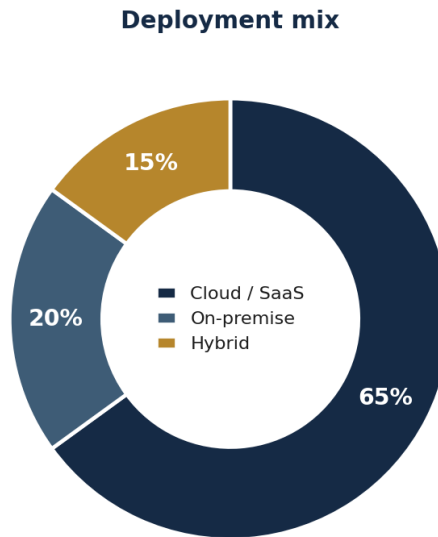
Figure 2. A representative growth trajectory at the ~12.8% CAGR most multichannel-OMS estimates cluster around.

Why the estimates diverge

The gap between a \$3B and a \$9B market is mostly a boundary problem. The smallest numbers count only standalone order-management software licenses. The mid-range multichannel figures add the orchestration and store-fulfillment capabilities that define a modern OMS. The largest numbers fold in adjacent logistics-order and fulfillment spend. For planning purposes, the core OMS software market sits in the low-single-digit billions and is compounding at roughly 12 percent, which is the figure most multichannel estimates agree on.

Regions, deployment, and verticals

North America leads consistently: Precedence Research puts it at 38 percent of the 2025 market and Fortune Business Insights at 34.5 percent, while Asia-Pacific is the fastest-growing region and Europe holds roughly a quarter of demand, shaped by GDPR data-protection requirements. Cloud and SaaS are now the default deployment, the largest and fastest-growing model, with on-premise retained mainly in regulated or security-sensitive environments and hybrid emerging as a pragmatic middle path. Retail and e-commerce is the largest vertical, at roughly 40 percent of the multichannel OMS market, followed by manufacturing, third-party logistics, and grocery.



Source: Precedence Research, 2025.

Figure 3. Deployment mix: cloud and SaaS dominate and are the fastest-growing model.

Drivers and restraints

Demand is propelled by a consistent set of forces, and held back by an equally consistent set of frictions.

- **Drivers:** omnichannel and unified commerce, BOPIS and ship-from-store, same-day and instant-delivery expectations, real-time inventory visibility, escalating returns complexity, marketplace proliferation, and rising B2B digital-commerce adoption.
- **Restraints:** implementation cost and complexity, integration burden across WMS, ERP, commerce, POS, and carriers, demanding data-quality requirements, and entanglement with legacy ERP that resists decoupling.

4. The vendor landscape

The OMS field spans global enterprise suites, focused best-of-breed specialists, ERP-embedded modules, and inventory-led SMB platforms. This section profiles the vendors that matter in 2026, grouped by the segment they serve best. The profiles are vendor-neutral by design: each notes strengths and limitations, because a credible comparison shows both, and the right choice depends on your operating profile rather than a ranking.

What the analysts say

Three independent evaluations anchor the 2026 landscape, and reading them together is more useful than citing any one in isolation.

- **Forrester Wave, Order Management Systems, Q1 2025:** assessed eight vendors against 35 criteria and named Manhattan the lone Leader, with the highest possible score in 20 of 27 current-offering criteria. Kibo and Fluent Commerce were also named Leaders, and IBM Sterling was cited as the next most functionally robust. Forrester characterized the category as a battleground.
- **Nucleus Research 2026 OMS Technology Value Matrix (April 2026):** broader, with five Leaders (Blue Yonder, Fluent Commerce, KBRW, Kibo, Manhattan), a band of Experts (Aptean/Logility, IBM Sterling, Infios, Oracle Fusion, SAP), Accelerators (Deposco, NetSuite, NewStore, OneStock), and Core Providers (fabric, Fulfillmenttools, Infor, Salesforce).
- **Gartner Market Guide for Distributed Order Management Systems (June 2025):** names representative vendors rather than ranking them, and emphasizes rising sales-channel complexity, third-party logistics providers serving smaller retailers, and growing B2B interest in unified inventory across multiple ERPs.



Structure after Nucleus Research 2026 OMS Technology Value Matrix (Apr 2026). Placements are SCR's directional interpretation, not exact analyst coordinates.

Figure 4. OMS vendor positioning, structured after the Nucleus Research 2026 Value Matrix. Placements are SCR's directional interpretation, not a reproduction of any analyst chart.

Enterprise and Tier 1

Manhattan Associates (Manhattan Active Omni)

The functional leader for specialty and omnichannel retail, and the lone Leader in Forrester's Q1 2025 Wave. Manhattan Active Omni is cloud-native, microservices-based, and versionless, meaning customers stay current without disruptive upgrades. Strengths are broad and deep: order orchestration, inventory segmentation and allocation (its Available-to-Commerce capability), store fulfillment, native RFID, fulfillment benchmarking, and an agentic AI service assistant (Manhattan Active Maven). Notable customers include PacSun, Groupe Dynamite, Brooks Brothers, Skechers (implemented in roughly 14 weeks during the pandemic), Michaels, and At Home. Common critiques from practitioner reviews are high cost, lengthy onboarding, and limited customization without paid modifications, along with a weaker fit for fast-moving consumer goods. In 2025 Manhattan deepened its retail reach with a Shopify connector.

Blue Yonder

An AI-driven, composable microservices OMS, frequently deployed as an orchestration layer on top of legacy systems rather than a full rip-and-replace. Strengths include real-time inventory availability, machine-learning-based delivery-date promising, order optimization, and demand sensing drawn from Blue Yonder's broader supply-chain heritage. Walgreens uses the platform to support a 30-minute order promise. Blue Yonder is a Nucleus 2026 Leader and continues to release AI capabilities spanning unified planning and execution.

IBM Sterling Order Management

A deep, highly configurable enterprise OMS that handles both B2B and B2C complexity, and part of the broader Sterling supply-chain suite. Strengths are order orchestration, multi-enterprise inventory visibility, optimized sourcing, configure-price-quote, and AI-infused execution. Notable customers include Ulta Beauty (intelligent promising), World Market, and the European group hagebau. Pricing is unusually transparent for the tier, with published list rates of roughly 1.5 cents per line for the Professional edition and 1.8 cents for Enterprise, metered by transaction volume, a model Forrester noted approvingly. The trade-offs are high implementation cost and complexity and a steep learning curve, which make a capable systems integrator essential.

Salesforce Order Management

A CRM-native OMS integrated with Commerce Cloud and the Sales and Service Clouds, with Einstein AI, a visual flow builder for orchestration, and omnichannel inventory. Its differentiator is the unified customer view that comes from sitting inside the Salesforce platform; the main caution is that cost escalates with order volume and add-ons. Nucleus places it as a Core Provider in 2026.

Oracle

Oracle fields two relevant lines: Oracle Retail Order Management for retail direct-to-consumer, and Oracle Fusion Cloud Order Management for order-to-cash, drop-ship, back-to-back, configure-to-order, and global order promising. Fusion is rated an Expert by Nucleus in 2026 and is a natural shortlist candidate for organizations already standardized on Oracle.

SAP

SAP provides enterprise order management within its broader commerce and ERP portfolio, and is a Nucleus 2026 Expert. It is strongest for organizations already running an SAP landscape, where native data and process integration outweigh the appeal of a best-of-breed specialist.

Specialists and challengers

Fluent Commerce

A cloud-native, API-first, headless distributed OMS that now positions itself as an agentic commerce infrastructure company. A Forrester Leader in Q1 2025, praised for orchestration workflows, configurable rules, store fulfillment, and B2B support, with implementations that often run under 12 weeks. Notable customers include JD Sports, L'Oreal, ALDO Group, LVMH, Prada, and Kingfisher. In February 2026 Fluent raised A\$46M from Bain Capital and rebranded around AI-ready operations; recent launches include a Model Context Protocol server (November 2025) and AI Order Sourcing Logic plus Fluent Connect (January 2026), the latter aimed at cutting third-party integration time from weeks to hours.

Kibo Commerce

A composable, modular, API-first OMS for high-volume retailers, manufacturers, distributors, and wholesalers, and a Forrester Leader with the strongest customer-satisfaction feedback of any vendor evaluated in the Q1 2025 Wave. Strengths include SLA management, endless aisle, subscription management, and intelligent routing. The current platform was rebuilt following the 2015 Shopatron merger.

KBRW

An enterprise OMS and DOM with particular strength in Europe, a Nucleus 2026 Leader, and a Gartner representative vendor. KBRW tends to appear on shortlists for large, complex omnichannel retailers that value configurability and resilience at scale.

Deposco

A fulfillment-plus-OMS platform that competes on speed of deployment, a Nucleus 2026 Accelerator and a recognized leader for omnichannel order management in mid-market and growth retail. A strong fit where time-to-value and operational fulfillment depth matter more than the deepest enterprise orchestration.

Aptos

A retail-focused OMS serving the US mid-market, known for a clean interface and solid distributed order management. It is historically stronger in customer-based routing rules than in the most complex enterprise substitutions and cost-based optimization, which is worth probing if those scenarios are central to your operation.

Other active specialists and regional players worth considering include NewStore and OneStock (store-first and European omnichannel), Fulfillmenttools and fabric (modern composable OMS), Infios (the former Korber software business), Deck Commerce (direct-to-consumer, with customers such as Build-A-Bear and New Balance), and Radial.

ERP-suite and SMB platforms

NetSuite, Microsoft Dynamics 365, and Infor embed order management within broader ERP and commerce suites, an efficient path for organizations that prefer one vendor and can accept less orchestration depth than a best-of-breed OMS. NetSuite is a Nucleus 2026 Accelerator and Infor a Core Provider.

At the SMB and inventory-led end of the market, a distinct group combines inventory and order management for product businesses, and this tier has drawn heavy private-equity investment, a sign of how active it has become:

- **Cin7** (Core and Omni) is an all-in-one inventory and order platform serving roughly 8,500 businesses; it is backed by Rubicon Technology Partners, which closed a \$500M single-asset continuation fund for Cin7 in late 2024, and has added AI forecasting (Inventoro) and embedded lending.
- **Linnworks** is a multichannel operations platform with 90-plus channel integrations and several thousand customers; it is owned by Marlin Equity Partners and includes SkuVault.
- **Brightpearl (by Sage)** is a mid-market retail operating system for multichannel retailers and wholesalers above roughly \$1M in revenue; Sage acquired it for about \$299M, with go-lives typically in the 90-to-120-day range.
- **Extensiv** (which includes the former Skubana as its Order Manager) targets third-party logistics providers and D2C brands, was named a 3PL platform of the year in 2024, and lists order-management entry pricing from roughly \$400 per month.
- **Logiwa** pairs cloud WMS with fulfillment for high-volume DTC and 3PL operations on volume-based pricing, and raised a Series B backed by Prologis Ventures and BAM Elevate. Increff and Vinculum are India-rooted players strong in fashion and omnichannel.

Vendor summary

The table below is an orientation aid, not a scorecard. Use it to frame a shortlist, then evaluate each candidate against the framework in the next section.

Vendor	Tier	Best fit	Notes
Manhattan	Enterprise	Complex omnichannel retail	Forrester lone Leader; deepest functionality, premium cost
Blue Yonder	Enterprise	AI-led, layer-on-legacy	Strong availability and promising; grocery proof points
IBM Sterling	Enterprise	B2B and B2C complexity	Highly configurable; transparent per-line pricing
Salesforce	Enterprise	CRM-centric retailers	Unified customer view; cost scales with volume
Oracle / SAP	Enterprise	Existing Oracle/SAP estates	Nucleus Experts; native suite integration
Fluent Commerce	Specialist	Composable, fast time-to-value	Forrester Leader; agentic and API-first; Bain-backed
Kibo	Specialist	High-volume composable	Forrester Leader; top customer satisfaction
KBRW / Deposco	Specialist	Europe; fast mid-market	Nucleus Leader / Accelerator respectively
Cin7 / Brightpearl	SMB	Inventory-led SMB	All-in-one; fast go-live; PE-backed
Extensiv / Logiwa	SMB / 3PL	3PL and high-volume DTC	Fulfillment-led; volume pricing

5. How to evaluate an OMS

Because the leading platforms approach feature parity, the most common selection mistake is choosing on the polish of a demo. A better approach scores every shortlisted vendor against the same defined dimensions, weighted for your operation. We organize the evaluation around five dimensions; weight them to your profile, since a cost-sensitive wholesaler and a high-velocity DTC brand evaluating the same vendors should, and will, reach different answers.

The five evaluation dimensions

1. **Functional and orchestration fit.** Can business users configure routing and allocation rules without code, and does the platform natively support your channel mix, fulfillment types, and returns flows? Fluent and Kibo emphasize low-code configuration; Manhattan's power assumes a trained team. A high score means the platform does what you need without heavy customization.
2. **Real-time performance and scalability.** Live inventory and availability must perform at peak, not just in a demo. Leaders now cite sub-500-millisecond availability checks and the ability to process thousands of transactions per second; validate behavior at your holiday peak volume specifically.
3. **Integration and architecture.** Assess the breadth and quality of pre-built connectors to WMS, ERP, commerce, POS, and carriers, and decide between composable and suite with clear eyes. Composable wins on flexibility but demands API governance and DevOps maturity; a suite wins on speed and simplicity.
4. **Total cost and commercial model.** Look past the license to the multi-year total, and understand how the model scales: per-line, per-order, revenue-share, per-user, or enterprise license. A low headline price that masks heavy services and run costs is not a low-cost choice.
5. **Viability and proof.** You are committing to a vendor for a decade, so weigh financial stability, R&D investment, roadmap credibility, and ownership stability, and demand multiple reachable references in your segment with quantified outcomes rather than logos.

Build versus buy

Custom OMS development runs roughly \$200K to \$400K and 7 to 12 months or more, and creates a permanent maintenance burden. Given the maturity of SaaS options across every tier, buying is now the standard choice; building is justified only in rare cases of truly unique requirements that no platform can configure.

Composable versus all-in-one suite

Composable suits digital-first organizations that need to change fast and have the engineering discipline to manage many integrations. A suite suits organizations that value a single throat to choke, predictable upgrades, and lower integration overhead. Many enterprises land in between: a composable OMS inside an otherwise consolidated stack.

A selection process that works

6. **Define requirements and your operating profile** (flows, volumes, peak behavior, channel mix, automation and store-fulfillment plans). This is the foundation everything else scores against.
7. **Build a shortlist of three to five** credible candidates by tier and fit. More dilutes the evaluation; fewer risks missing fit.

8. **Score against the five dimensions** with a weighted scorecard, so every vendor is compared on the same basis.
9. **Run scripted demonstrations** using realistic scenarios from your own operation, rather than a polished generic tour.
10. **Check references in your segment** and ask specifically about implementation experience and measured results.
11. **Model five-year total cost** across finalists, then decide and plan the implementation before you sign.

6. Cost and pricing

OMS pricing models include SaaS subscription (tiered), order-volume or transaction-based (such as IBM's per-line rate), revenue-share (a red flag for high-volume sellers, since the fee rises with success), per-user, and enterprise license. The single most important budgeting fact is that services frequently equal or exceed first-year license cost. Integration alone can be roughly half of an OMS project, so plan a services-to-license ratio of at least one to one.

Cost element	Indicative figure	Notes
SMB / mid-market 3-yr TCO	~\$90K-\$225K	Roughly a 50-user deployment
Custom-built OMS	\$200K-\$400K + 7-12 mo	Plus an ongoing maintenance burden
Enterprise license (e.g., IBM)	~\$100K/yr+	Scales with modules and volume; IBM lists 1.5-1.8 cents per line
Enterprise implementation	\$50K-\$500K+	Scales with integrations and complexity
SMB entry (Extensiv, Brightpearl)	~\$375-\$400/mo	Third-party listed entry pricing

What drives cost

Four variables move the total more than the license rate: the number and complexity of integrations, the degree of customization versus configuration, the quality of the data being migrated, and order volume (for usage-based models). A program that favors configuration over custom code, cleans its data before migration, and limits the first wave to core scenarios will spend materially less than one that does the opposite.

Building a five-year total cost of ownership

Model the full picture before comparing vendors: subscription or license, implementation and integration services, data migration, training and change management, ongoing support and run costs, and annual renewal escalators of typically 3 to 7 percent. A platform with a lower subscription but a heavier, customization-dependent implementation can be the more expensive choice once the five-year view is in front of you.

Most enterprise vendors gate pricing, and third-party estimates vary; confirm via direct quotes, and watch for EDI and transaction surcharges that do not appear in the headline number.

7. Implementation: where programs succeed or fail

If selection is the consequential decision, implementation is where it pays off or unravels. Specialist DOMs cite go-lives of eight weeks to six months; enterprise suites run 6 to 18 months; phased, API-first approaches that augment before they replace can deliver initial capability in about 90 days. The timeline matters less than the discipline: the failure statistics below are not mainly about software quality, they are about how programs are run.

Why programs fail

- **Undefined goals and requirements** that let scope drift from the first week.
- **Underestimated integration complexity** across WMS, ERP, commerce, POS, and carriers, the single most common source of overruns.
- **Poor data and SKU quality** that surfaces only during migration, when it is most expensive to fix.
- **Over-scoped big-bang first waves** that try to deliver everything at once instead of sequencing.
- **Skipped testing and parallel runs**, and insufficient training and change management, consistently the most underfunded line in failed projects.

OMS-specific failure data is scarce, so the figures below are enterprise-software and ERP analogs. They likely overstate OMS-specific risk, but the directional lesson holds.

~70% of ERP implementations will fail to meet objectives over the next three years (Gartner)	~50% of ERP projects fail on the first attempt (RubinBrown / Deloitte analysis)	~50% of OMS project effort is integration work alone (Fluent Commerce)
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Three principles that separate success from failure

Resource it realistically. The most common overrun is underestimating internal staffing. Name the owners, protect their time, and budget realistic internal hours from the start.

Control scope ruthlessly. Favor configuration over custom code, and treat every while-we-are-at-it request as the risk it is.

Invest in change management. Up to three-quarters of expected ROI is tied to organizational change, yet many programs allocate less than ten percent of budget to it.

The role of a systems integrator

Enterprise OMS programs are rarely run by the software vendor alone. An experienced systems integrator handles the integration, data migration, and configuration work, and an independent integrator can also audit the vendor's professional-services plan and keep the evaluation honest. The evidence from adjacent enterprise software is that success rates rise sharply when qualified implementation expertise leads the work, so treat the integrator selection with the same rigor as the software selection.

A phased rollout

The lowest-risk pattern is to sequence value rather than attempt a single cutover. Stand up core order capture, sourcing, and fulfillment first; prove it on a controlled slice of volume with a parallel run; then add

store fulfillment, returns optimization, and marketplace integrations in subsequent waves. This augment-then-migrate approach delivers early wins, contains risk, and gives the organization time to adopt new ways of working.

8. Trends shaping 2026

AI, machine learning, and agentic AI

AI has moved from pitch to product. Vendors are shipping AI-driven sourcing and routing (Fluent's AI Order Sourcing supports A/B testing of rules), machine-learning demand sensing and delivery promising (Blue Yonder), and agentic customer-service assistants that resolve order issues in natural language (Manhattan Active Maven). A parallel development is the appearance of Model Context Protocol servers that let AI shopping agents connect to OMS backends directly.

Agentic commerce, with a caution

As AI agents begin to place orders, OMS platforms are being pushed toward clean, machine-readable APIs, because agents read APIs, not pixels. This channel is real but nascent and volatile. OpenAI launched ChatGPT Instant Checkout in late September 2025, then discontinued the in-chat checkout in March 2026 and pivoted to a discovery-first model, while Perplexity and Amazon pursued their own approaches. The lesson is to invest in durable API and architecture readiness rather than betting the roadmap on any single agent integration.

Composable and MACH architecture

Composable is now the default architecture for digital-first brands, prized for the ability to change one capability without re-platforming the whole stack, subject to the integration-tax caveat discussed earlier. The practical trend is selective composability: modular where flexibility pays, consolidated elsewhere.

Real-time inventory, sustainability, and unified commerce

Sub-second availability is becoming table stakes for conversion; carbon-aware fulfillment that consolidates shipments and minimizes emissions is moving from differentiator to expectation; and unified commerce continues to merge front-end and back-end into a single platform. Alongside it, Nucleus highlights the convergence of B2C and B2B order management and of OMS, WMS, and inventory within unified platforms managing all order types.

Consolidation and M&A

The category is consolidating through both strategic acquisition and private equity. Recent moves include Bain Capital's investment in Fluent Commerce, Sage's acquisition of Brightpearl, Rubicon's continuation fund for Cin7, and Marlin Equity's ownership of Linnworks. For buyers, the implication is to weigh ownership and roadmap stability, especially among smaller specialists, as part of the viability dimension.

9. Segment-specific guidance

The phrase best OMS is meaningless without an operating context. The table summarizes what tends to dominate the decision by profile; the notes that follow add detail for the most common cases.

Operating profile	What matters most	Vendors that fit
Retail / omnichannel	Store fulfillment, BOPIS, ship-from-store, inventory segmentation, POS unification	Manhattan, Blue Yonder, IBM, Kibo
Pure e-commerce / DTC	Speed, marketplace integration, returns	Fluent, Kibo, Deposco, Extensiv, Cin7
B2B / wholesale	Contract pricing, bulk orders, multi-ERP inventory, CPQ	IBM Sterling, Fluent
Grocery	High velocity, perishability, substitutions, micro-fulfillment	Blue Yonder (Walgreens 30-min promise)
3PL	Multi-client inventory, fulfillment orchestration, cost-to-serve	Extensiv, Logiwa, KBRW
Manufacturing	Configure-to-order, back-to-back, complex products	Oracle Fusion, SAP, IBM

Retail and omnichannel operations have the deepest needs, and the decision usually turns on store fulfillment, BOPIS and ship-from-store, inventory segmentation, and POS unification, with peak-season behavior as the real test. **Pure e-commerce and DTC** brands prioritize speed, marketplace breadth, and returns, and reward fast time-to-value. **B2B and wholesale** buyers need contract pricing, bulk-order handling, multi-ERP inventory, and configure-price-quote, where IBM Sterling and Fluent are strongest and where Nucleus notes growing B2C/B2B convergence. **Grocery, 3PL, and manufacturing** each carry distinctive demands, from perishability and substitutions to multi-client cost-to-serve and configure-to-order complexity, and should weight functional fit and segment-specific references most heavily.

10. ROI and the business case

Quantified OMS benefits cluster around inventory efficiency, fulfillment cost, and revenue protection. Vendor-sourced figures should be validated against your own baseline, but the direction is consistent and the payback window is typically 6 to 18 months.

~26% fulfillment-cost reduction; AI-driven solutions add ~21% (ClearOmni)	30-45% split-shipment reduction within 60 days via forward-stocking (industry playbook)	~10% order-cancellation rate from overselling that real-time ATP eliminates (Deposco)
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The value levers

A credible business case usually rests on six levers. Inventory efficiency improves as a single network view reduces safety and dead stock and lifts turns. Split-shipment reduction cuts shipping cost directly, often by forward-stocking high-affinity SKU pairs. Conversion lift follows from accurate availability and store-fulfillment options, with omnichannel formats such as BOPIS and curbside converting at higher rates than non-omnichannel baselines. Markdown reduction comes from selling more inventory at full price by exposing all of it to demand. Labor savings accrue as automation removes manual order handling and shortens service-resolution time. And returns recovery improves margin through integrated reverse logistics and fraud screening.

Returns deserve their own line: U.S. retail returns reached \$849.9B in 2025, about 15.8 percent of sales, with e-commerce return rates near 19 percent and per-return processing costs of \$10 to \$65 (NRF and Happy Returns, 2025). Targets that disciplined programs aim for include inventory accuracy of 97 to 99 percent and order-error rates below one percent. The business case is strongest when it is built on your own baseline numbers, with vendor figures used only to size the opportunity.

11. Frequently asked questions

What is an OMS?

Software that orchestrates the full order lifecycle, from capture through fulfillment to returns, across all sales channels. It is the coordination layer between customers and fulfillment, deciding how each order is sourced, routed, and delivered.

What is the difference between an OMS and a WMS?

The OMS decides where and how to fulfill an order across the network; the WMS executes the physical work, receiving, putaway, picking, packing, and dispatch, inside one warehouse. They are complementary layers, not alternatives.

What is the difference between an OMS and an ERP?

ERP is the finance and back-office system of record. The OMS is the real-time, customer-order-centric orchestration layer. ERPs were not designed for distributed omnichannel routing, which is why stretching an ERP to do orchestration is a common and costly mistake.

How is an OMS different from my e-commerce platform?

The commerce platform owns product discovery, cart, and checkout, everything up to the buy button. The OMS owns everything after it: availability, sourcing, fulfillment, tracking, and returns.

What does an OMS cost?

SMB three-year total cost of ownership runs roughly \$90K to \$225K; enterprise license is \$100K per year and up, plus implementation of \$50K to \$500K or more; transaction-based options run around 1.5 to 1.8 cents per line. Budget services at one to one or more against license.

How long does an OMS take to implement?

Eight weeks to six months for specialist distributed order management platforms; 6 to 18 months for enterprise suites; about 90 days for phased, API-first rollouts that add capability in waves.

Do I need distributed order management (DOM)?

If you fulfill from multiple nodes, sell across multiple channels, and offer BOPIS or ship-from-store, yes. A basic single-node OMS will break under that complexity.

Should I build or buy?

Buy is now the standard choice. A custom build runs \$200K to \$400K and 7 to 12 months or more and creates a permanent maintenance burden that mature SaaS platforms remove.

Composable or all-in-one suite?

Composable suits digital-first organizations that need to change fast and can manage many integrations; a suite suits those that value predictable upgrades and lower integration overhead. Many enterprises adopt a composable OMS inside an otherwise consolidated stack.

How do I know I have outgrown my current OMS?

Telltale signs include overselling and cancellations, an inability to support store fulfillment or BOPIS, manual workarounds to route orders, poor peak-season performance, and ERP customizations piling up to compensate for missing orchestration.

12. Recommendations

- 12. Shortlist by tier and fit, not brand prestige.** Enterprise omnichannel retailers (roughly \$1B and up, with complex store fulfillment) should evaluate Manhattan, Blue Yonder, and IBM Sterling. Mid-market and digital-first brands needing fast time-to-value should evaluate Fluent, Kibo, Deposco, and KBRW. SMB and inventory-led businesses should look at Cin7, Brightpearl, Extensiv, and Logiwa.
- 13. Run a structured RFP against the evaluation framework,** weighting orchestration configurability, real-time ATP at peak, integration depth, and time-to-value over raw feature counts, since leading platforms are near parity on features.
- 14. Budget realistically and stage the rollout.** Plan services at one to one or more against license, allocate 10 to 15 percent of budget to change management, and scope the first wave to core capture, routing, and fulfillment before adding store fulfillment, returns optimization, and marketplace integrations.
- 15. De-risk integration early.** Inventory every system the OMS must touch, clean SKU and inventory data before migration, and engage an independent integrator to audit the vendor's professional services.
- 16. Apply decision thresholds.** Four or more fulfillment nodes and multiple channels means prioritize a true DOM. Fewer than ten current API integrations means start headless, not fully composable. Meaningful AI-agent traffic expected means prioritize clean APIs and MCP support, but treat agentic checkout as volatile. ERP omnichannel workarounds generating technical debt means it is time to decouple with a dedicated OMS.

13. Methodology and caveats

- **Market sizing diverges widely** (\$2.95B to \$9.6B for 2025-26 depending on category definition); all figures are directional, and several estimates come from firms whose methodologies are not public.
- **Many ROI and cost figures are vendor-sourced** (Deposco, ClearOmni, Fluent, Blue Yonder) and should be validated against your own baseline before use in a business case.
- **Implementation-risk statistics are ERP and enterprise-software analogs** (Gartner, Panorama Consulting 2025, RubinBrown/Deloitte), not OMS-specific, and likely overstate OMS-specific risk.
- **Analyst placements differ by methodology**: Forrester (Manhattan Lone Leader) and Nucleus (five Leaders) are not directly comparable, and Gartner's Market Guide does not rank vendors. The quadrant in Figure 4 is SCR's directional interpretation, not a reproduction of any analyst chart.
- **Some vendor developments are industry-reported** rather than confirmed by primary release, and most vendor pricing is gated; confirm details via direct quotes before relying on them.

14. Sources

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Additional figures drawn from: Fortune Business Insights, Business Research Insights, Cognitive Market Research, Verified Market Research, Virtue Market Research, and Persistence Market Research (market sizing); Nucleus Research 2026 OMS Technology Value Matrix; Forrester Order Management Systems Wave, Q1 2025; Panorama Consulting 2025 ERP Report; and the NRF and Happy Returns 2025 Returns Landscape. Vendor capability and customer claims are vendor-stated unless otherwise noted.

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