

SUPPLY CHAIN RESEARCH

Independent · vendor-neutral research

Freight Procurement Software

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting freight and transportation procurement software: what these systems do, how they run RFPs and bid optimization, 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** · June 2026 · Vendor-neutral: we take no payment from the vendors covered.

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1. Executive summary

Freight procurement software runs the process by which a shipper buys transportation: building and issuing freight RFPs, collecting carrier bids across hundreds or thousands of lanes, optimizing award scenarios, and managing the resulting rates and contracts. It is distinct from a transportation management system, which executes shipments, and from generic sourcing software, which does not understand lanes, accessorials, or capacity. For years freight sourcing happened in spreadsheets and annual bid events. Rate volatility, capacity swings, and the arrival of AI have changed that, turning freight procurement into a continuous, increasingly automated discipline. In 2026 the category is being reshaped by agentic AI that runs bids, by the convergence of procurement with visibility and execution, and by an unusual fact: it has no analyst scoreboard of its own.

This guide is written for transportation, logistics, procurement, and supply chain leaders evaluating a freight sourcing investment, and for the teams who must integrate it with the TMS and run the bids. 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 the scale of your freight spend, whether you want freight-native depth or a generic sourcing tool, and how much automation you value. The pages that follow define the category, size the market honestly while flagging its conflation with two bigger markets, profile the AI-native, network-backed, and TMS-embedded tiers, lay out an evaluation framework, and explain why lane-level depth and TMS integration, not the feature list, decide the return.

No dedicated MQ there is no standalone Magic Quadrant for freight procurement; it sits inside the TMS quadrant	40-60% transportation's share of total logistics cost, which is what makes freight sourcing matter	Spend-tiered the right tool depends on freight spend, from generic RFP to autonomous sourcing
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What the evidence says

There is no analyst scoreboard for this category. No dedicated Gartner Magic Quadrant or Forrester Wave covers freight procurement; it is assessed inside the Transportation Management Systems quadrant, so buyers must look beyond the analyst grid.

It is a thin slice of two bigger markets. Dedicated freight procurement is sized near \$1.2B to \$1.7B, and is routinely conflated with broad procurement software at roughly \$8B to \$11B and with freight management software.

The right tool scales with freight spend. Small programs can use generic sourcing, mid-sized programs reward AI bid analysis, and very large programs reward autonomous, agentic sourcing across many lanes.

Lane-level depth is the dividing line. Generic sourcing tools choke on lane pricing, accessorials, and capacity, which is why freight-native platforms exist and why integration with the TMS matters.

Agentic AI is the live frontier. AI that runs freight bids autonomously is moving from promise to product, and it is concentrated among the freight-native specialists rather than the generic suites.

2. What freight procurement software is

Freight procurement software helps a shipper buy transportation capacity at the right price and terms. The core capabilities are:

- **Freight RFP and bid management.** Building and issuing requests for proposals to carriers across many lanes, and collecting and normalizing their bids.
- **Bid optimization and scenario analysis.** Optimizing award decisions across lanes, carriers, and constraints, and testing scenarios that balance cost, service, and capacity.
- **Lane and rate management.** Handling the lane-level pricing, accessorials, and capacity commitments that distinguish freight from other categories of spend.
- **Contract and rate repository.** Storing awarded rates and contracts and feeding them to execution, so the negotiated price is the price that is paid.
- **Spot and dynamic procurement.** Running mini-bids and spot procurement between annual events, as freight buying becomes more continuous.

Why freight is not generic sourcing

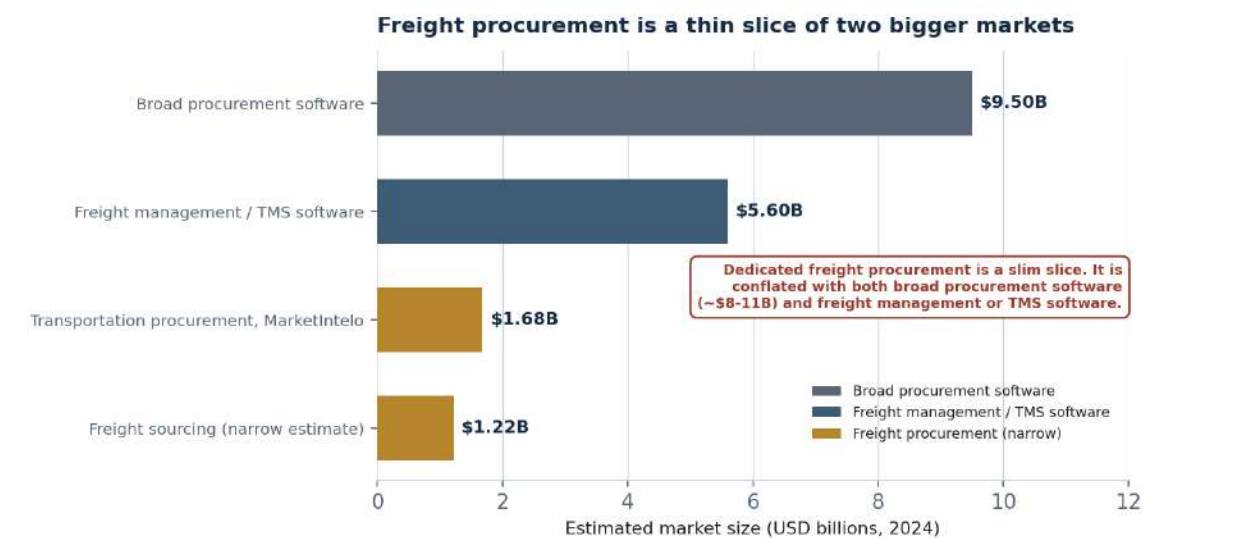
The single most important thing to understand about freight procurement is why it needs dedicated software at all. Buying freight is not like buying office supplies. A freight bid spans hundreds or thousands of lanes, each with its own rate, accessorial charges, and capacity dynamics, and awarding it well requires optimization across all of them at once. Generic sourcing tools, built for catalog spend, choke on this lane-level complexity, which is why freight-native platforms exist. Because transportation is forty to sixty percent of total logistics cost, getting the award right has outsized financial impact, and the depth of a platform's lane-level and optimization capability is the heart of any evaluation.

System	What it does	Relationship
Freight procurement	Sources and awards freight	Buys the capacity
TMS	Plans and executes shipments	Uses the rates
Generic sourcing	Buys catalog and indirect spend	Lacks lane logic
Rate benchmarking	Compares rates to the market	Informs the bid

Freight procurement is distinct from the transportation management system that executes the shipments, and from the generic sourcing software used for other categories, though it increasingly integrates with both and sometimes sits inside a TMS. Knowing whether you need freight-native depth or can use a generic tool is the first scoping decision, and it depends heavily on the scale of your freight spend.

3. The freight procurement market in 2026

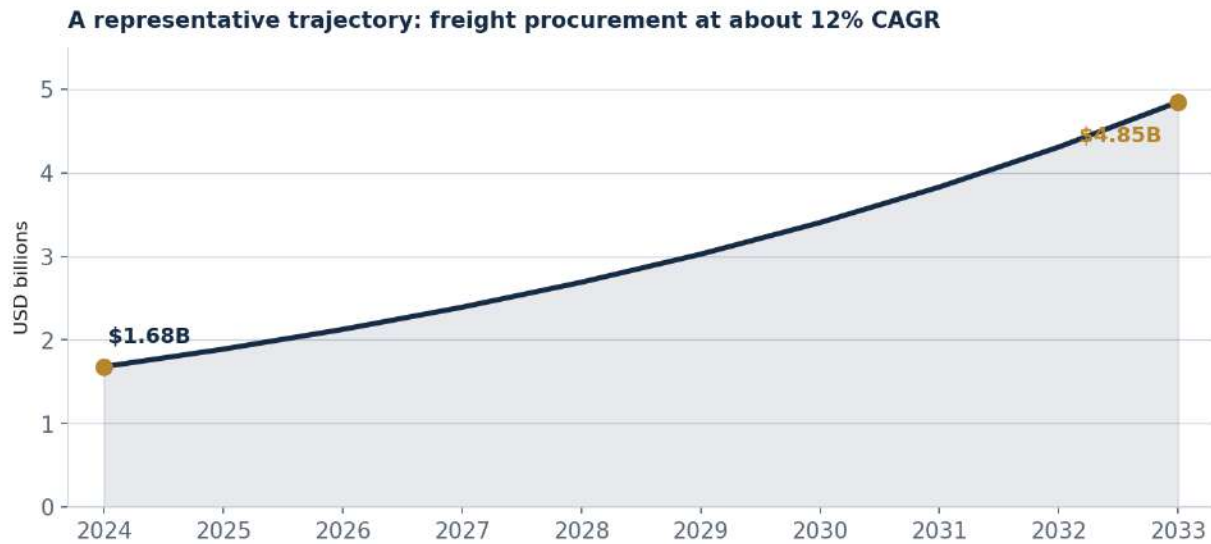
Freight procurement is a small, fast-growing category that is hard to size because it is squeezed between two much larger markets. Dedicated freight procurement software is sized near \$1.2B to \$1.7B; broad procurement software is roughly \$8B to \$11B; and freight management software is larger still. Treat the figures below as directional, and check what each one is counting.



Source: Supply Chain Research analysis of published 2024 estimates (MarketIntel for transportation procurement). Broad procurement and TMS figures are representative; treat all as directional.

Figure 1. Published 2024 estimates by definition. Dedicated freight procurement is a thin slice, conflated with both broad procurement and freight management software.

Source and definition	Size	Forecast	CAGR
Broad procurement software	~\$9.5B (2024)	Larger by 2030s	8-10%
Freight management / TMS software	~\$5.6B (2024)	Growing steadily	10-15%
Transportation procurement (MarketIntel)	\$1.68B (2024)	~\$4.85B / 2033	12.5%
Freight sourcing (narrow estimate)	~\$1.22B (2024)	Low-teens growth	11-14%



Source: MarketIntelto (transportation procurement software, ~12.5% CAGR). Estimates for the narrow freight-sourcing category cluster between 11 and 14 percent.

Figure 2. A representative trajectory for freight procurement at about 12 percent CAGR (MarketIntelto). The narrow category grows in the low teens.

Why the estimates diverge

The spread is definition and boundaries. The narrowest figures count dedicated freight RFP and sourcing software; the broadest fold in either all procurement software or all freight management software, both far larger. Dedicated freight procurement sits near \$1.2B to \$1.7B in 2024 and grows in the low teens, faster than broad procurement, as more shippers move off spreadsheets and as spot and dynamic procurement add volume. For planning, the narrow transportation-procurement figures of around \$1.2B to \$1.7B are the most consistent baseline for the dedicated category, with the understanding that much freight sourcing still happens inside TMS platforms and generic tools and is not captured separately.

Why freight spend sets the approach

The most useful way to think about this market is not the total size but the shipper's own freight spend, because that determines which tool fits, shown in Figure 3. A shipper with under ten million dollars of freight can run a structured RFP in a generic tool. Between ten and a hundred million, AI-driven bid analysis and scenario optimization start to pay for themselves. Above a hundred million, with many lanes and frequent change, autonomous and agentic sourcing of the kind offered by the freight-native specialists becomes worthwhile. The category, in other words, is segmented less by industry than by spend.

Match the tool to freight spend: three bands



As freight spend rises, the value of AI bid optimization and autonomous sourcing grows. Generic tools fit small programs; large ones need freight-native depth.

Figure 3. The spend-tiered view. As freight spend rises, the value of AI bid optimization and autonomous sourcing grows, and generic tools give way to freight-native depth.

4. The vendor landscape

The freight procurement market spans AI-native freight sourcing specialists, network-backed platforms, TMS-embedded procurement, and generic sourcing suites. We group vendors into four tiers by what they do best, not by size. No vendor leads every tier, and the most important nuance is that there is no analyst quadrant to rank them.

What the analysts say, and where the gap is

This category has no scoreboard of its own, which is itself the headline. The essentials:

- **There is no dedicated Magic Quadrant or Wave.** Neither Gartner nor Forrester publishes a standalone evaluation of freight procurement software, so there is no ranked grid to lean on.
- **It is assessed inside the TMS quadrant.** Gartner covers freight sourcing as a capability within its Magic Quadrant for Transportation Management Systems, alongside the execution functions, rather than on its own.
- **No quadrant means references and pilots matter more.** Without a scoreboard, reference customers with freight spend like yours, and a pilot bid on your own lanes, carry more weight than a ranking would.

Freight procurement landscape, 2026



There is no dedicated Gartner Magic Quadrant or Forrester Wave for freight procurement; it is assessed inside the Magic Quadrant for Transportation Management Systems. SCR interpretation, not analyst coordinates.

Figure 4. Supply Chain Research's directional map. There is no dedicated quadrant for freight procurement; these positions are our interpretation, not analyst coordinates.

AI-native freight sourcing

These vendors were built specifically for freight sourcing, with optimization and increasingly autonomy at their core. Keelvar, which has raised significant venture funding and serves shippers such as Coca-Cola,

Nestle, and Samsung, pioneered sourcing optimization and has introduced agentic bidding that runs events with limited human input. GoodShip, which raised a Series B and reports rapid growth with customers including Tropicana and KeHe, pairs procurement with analytics, and Pando and Emerge round out the group. Strengths: depth of optimization, freight-native design, and leading-edge automation. Limitations: they are younger and smaller than the suites, and integration with an incumbent TMS must be proven.

Network-backed platforms

These vendors pair freight sourcing with a large carrier network and execution reach. Transporeon, now part of Trimble after a major acquisition, connects on the order of a hundred and fifty thousand carriers and over a thousand shippers and handles enormous freight spend, and C.H. Robinson's Navisphere combines sourcing with one of the largest carrier networks. e2open and Uber Freight extend procurement across their networks. Strengths: carrier reach, market data, and the link from sourcing to execution. Limitations: value is greatest within that network, and the procurement module is one part of a much larger platform.

TMS-embedded and generic

Two further groups complete the picture. TMS-embedded procurement, inside Oracle Transportation Management, MercuryGate, Manhattan, and Blue Yonder, lets shippers source within the system that executes shipments, convenient but often shallower on bid optimization. And generic sourcing suites, Coupa, SAP Ariba, and JAGGAER, can run freight bids but lack the lane-level depth of the specialists. Strengths: integration with execution and with broader procurement respectively. Limitations: the TMS modules are less sophisticated at optimization, and the generic suites struggle with lane and accessorial complexity.

Vendor summary

Vendor	Tier	Best fit	Notes
Keelvar	AI-native sourcing	Large, complex freight bids	Agentic bidding; major shippers
GoodShip	AI-native sourcing	Procurement plus analytics	Fast-growing; Series B
Pando / Emerge	AI-native sourcing	Digital freight sourcing	Newer entrants
Transporeon (Trimble)	Network-backed	Network sourcing at scale	~150K carriers; Trimble-owned
C.H. Robinson Navisphere	Network-backed	Sourcing plus brokerage reach	Very large carrier network
Oracle OTM / MercuryGate / Manhattan	TMS-embedded	Sourcing within the TMS	Convenient; shallower optimization
Coupa / SAP Ariba / JAGGAER	Generic sourcing	Small freight programs	Lack deep lane-level logic
e2open / Uber Freight	Network-backed	Network and managed sourcing	Procurement within a wider platform

Positions and notes are Supply Chain Research's interpretation from public information and the Gartner Magic Quadrant for Transportation Management Systems, current to mid-2026. There is no dedicated quadrant for freight procurement. Ownership and scope change quickly; verify current details directly with each vendor.

5. How to evaluate a freight sourcing platform

The differentiators in freight procurement are lane-level optimization depth, TMS integration, and fit to your freight spend, more than the headline feature list. We use five dimensions.

The five evaluation dimensions

1. **Optimization depth.** How well does it optimize awards across many lanes, carriers, and constraints, and run scenarios? This is the core capability that separates freight-native tools from generic ones.
2. **Freight-native handling.** Does it handle lane-level pricing, accessorials, capacity, and mode-specific needs, the complexity that generic sourcing tools cannot manage?
3. **TMS and execution integration.** How cleanly do awarded rates flow into the TMS that executes shipments, so the negotiated price is the price that is paid?
4. **Fit to freight spend.** Does the platform match the scale of your freight spend, generic for small programs, AI optimization for mid-sized, autonomous for very large?
5. **AI, automation, and viability.** Assess agentic and AI bid capability, market-rate data, ease of running events, and the vendor's stability in a consolidating market.

Making the decision

Match the platform to your freight spend and your stack. Large, complex freight programs reward the AI-native specialists such as Keelvar for optimization and autonomy. Shippers wanting carrier reach and a link to execution reward the network-backed platforms such as Transporeon and Navisphere. Shippers who want to source inside their TMS reward its embedded module, and small programs can use a generic suite. Then validate optimization depth and TMS integration on your own lanes.

A selection process that works

6. Size your freight spend and lane complexity, and use it to set the level of tool you need.
7. Run a pilot bid on a representative set of your own lanes, not a vendor demonstration.
8. Test optimization and scenario analysis against your real constraints and award rules.
9. Probe TMS and execution integration early, confirming awarded rates flow through cleanly.
10. Assess AI and agentic capability, market data, and references among shippers with freight like yours.

6. Cost and pricing

Freight procurement pricing varies with freight spend, the number of events, and whether the tool is standalone or part of a network or TMS, and integration drives part of the effort. The models you will encounter:

Pricing model	Typical basis	Notes
Subscription	Annual platform fee	Scales with spend and event volume
Per event or bid	Per RFP run	Suits occasional sourcing
Within a network	Network access fee	Bundled with carrier reach
Within a TMS	Part of TMS cost	Sourcing module of the suite
Implementation	Project fee	TMS integration and setup

What drives the number

Freight spend, the number of sourcing events, and the deployment model are the main cost drivers, and integration with the TMS is the largest implementation effort. A dedicated AI-native platform for a large shipper is a meaningful subscription plus a TMS integration project; sourcing inside a TMS a shipper already runs can be far cheaper but shallower. A common mistake is choosing a tool that does not match the freight spend, either over-buying autonomous capability for a small program or under-buying generic tools for a complex one that needs optimization. Model the full cost, including TMS integration, against the freight savings the platform can realistically deliver.

Freight procurement pricing is typically gated behind a sales process and depends on spend and complexity, so published figures should be treated as starting points. Build a pilot bid on your own lanes and a reference check into the buying process to validate both cost and the freight-cost savings the vendor projects.

7. Implementation: where programs succeed or fail

Freight procurement programs fail in predictable ways, and almost none of the failure modes are about the user interface. They are about lane complexity, integration, and execution. The recurring causes:

- **The tool cannot handle the lane complexity.** If a generic tool is used for a complex freight program, it cannot optimize across lanes and accessorials, and the award is worse than a freight-native tool would produce.
- **Awarded rates do not reach execution.** If the negotiated rates do not flow cleanly into the TMS, the savings leak away as shipments are executed at the wrong rates.
- **The tool is mismatched to freight spend.** Buying autonomous capability for a tiny program wastes money, and using generic tools for a huge one leaves savings on the table. Fit to spend is decisive.
- **Carrier participation is weak.** If carriers do not engage with the bid, the responses are thin and the award suffers, so making participation easy for carriers matters.

Lane depth optimization across lanes and accessorials is what produces a better award	Integration awarded rates must flow into the TMS or the savings leak in execution	Fit to spend the tool must match the size of the freight program, neither over nor under
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Three principles that separate success from failure

Match the tool to the freight spend. Use generic sourcing for small programs, AI optimization for mid-sized, and autonomous sourcing for very large ones, because the wrong fit wastes money or leaves savings unclaimed.

Integrate sourcing with execution. Make sure awarded rates flow cleanly into the TMS, because savings won in the bid are lost if shipments execute at the wrong rates.

Make it easy for carriers to bid. Reduce the friction of participating, because strong carrier engagement is what produces competitive responses and a better award.

A phased rollout

Sequence the program to retire risk early. Begin with a defined set of lanes or a region, running a pilot bid, integrating the awarded rates into the TMS, and proving the savings against the prior approach. Then extend to more lanes and modes, add spot and dynamic procurement between events, and introduce more automation as confidence grows. Treating these as sequential stages, rather than a single switch, is what separates a smooth rollout from a stalled one.

8. Trends shaping 2026

Agentic AI for freight sourcing

The dominant trend is agentic AI: software that runs freight bids autonomously, negotiating with carriers and managing events with limited human input, with the freight-native specialists leading. This is moving from promise to product, and it points toward continuous, machine-run sourcing rather than periodic, manual bid events. As with all agentic claims, demonstrated capability should be weighed over roadmap promises.

Spot and dynamic procurement

Freight buying is becoming more continuous, with mini-bids and spot procurement supplementing or replacing the annual bid event. As rate volatility persists, the ability to source dynamically, awarding lanes more frequently and reacting to the market, is becoming a core capability rather than an exception.

Convergence of procurement, visibility, and execution

The boundaries between sourcing, real-time visibility, and execution are blurring, as platforms orchestrate the whole transportation lifecycle. This convergence, visible in the network-backed platforms, means freight procurement is increasingly bought as part of a broader transportation platform rather than as a standalone tool.

Rate benchmarking on real freight data

Sourcing decisions are increasingly informed by market-rate benchmarking drawn from real freight transaction data, so shippers can see whether a bid is competitive against the broader market. Access to credible rate data, and the analytics to use it, is becoming a differentiator among platforms.

Consolidation

The market is consolidating, with Trimble's acquisition of Transporeon a leading example, concentrating sourcing, network, and execution in larger platforms. Buyers should weigh the reach and integration this brings against the independence and freight-native depth of the specialists, and watch how ownership shifts.

9. Segment-specific guidance

The right approach depends chiefly on freight spend, and secondarily on your stack. The table summarizes where each segment usually starts; the prose adds the nuance.

Shipper profile	What matters most	Where to start
Very large freight spend	Optimization, autonomy	Keelvar, Transporeon
Mid-sized freight spend	AI bid analysis, scenarios	Keelvar, GoodShip, network platforms
TMS-standardized shipper	Integration with execution	Oracle OTM, MercuryGate, Manhattan
Network and brokerage user	Carrier reach, market data	C.H. Robinson, Uber Freight, e2open
Small freight program	Simplicity, low cost	Generic sourcing or TMS module

Shippers with very large freight spend reward the optimization and autonomy of the AI-native specialists and the scale of the network platforms. **Mid-sized shippers** reward AI bid analysis and scenario optimization, where the value of dedicated tools first appears. **TMS-standardized shippers** may reward sourcing inside the TMS for integration. **Network and brokerage users** reward carrier reach and market data, and **small freight programs** reward simplicity and low cost, often a generic tool. The unifying rule is to match the platform to your freight spend first, then your transportation stack.

10. ROI and the business case

The business case for freight procurement is direct: better sourcing lowers what a shipper pays to move goods, and transportation is a large share of total logistics cost. The levers are freight-cost reduction, better award decisions, faster sourcing cycles, and improved carrier service. The discipline is refusing to bank the vendor's headline figure before testing it against your own lanes.

Freight cost better optimization and competition lower the rates a shipper pays	Cycle time running bids faster and more often captures market opportunities	Service balanced awards improve carrier reliability, not just price
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Where the value comes from

Most of the return comes from lower freight cost. Optimizing awards across lanes and carriers, and increasing competition through well-run bids, reduces the rates a shipper pays, and because transportation is forty to sixty percent of total logistics cost, even modest percentage savings are large in absolute terms. Industry and vendor figures cite freight-cost reductions in the range of roughly three to twenty percent from better sourcing, but these are vendor and trade-sourced and should be treated as a ceiling, with the high end reserved for large, previously manual programs. Beyond cost, faster and more frequent sourcing captures market opportunities, and scenario optimization balances price against service rather than chasing the lowest rate alone. The business case is strongest for shippers with large, complex freight spend currently sourced in spreadsheets, but the savings should be modeled on your own lanes and rates, with vendor figures used only to size the opportunity.

11. Frequently asked questions

What is freight procurement software?

Software that runs the process of buying transportation: building and issuing freight RFPs, collecting carrier bids across many lanes, optimizing award scenarios, and managing the resulting rates and contracts. It is distinct from a transportation management system, which executes shipments, and from generic sourcing software.

How is it different from a TMS?

A transportation management system plans and executes shipments and uses the awarded rates; freight procurement software sources and awards the freight in the first place. Some TMS platforms include a sourcing module, but dedicated freight procurement tools typically optimize bids far more deeply. The two integrate closely.

Why not just use generic sourcing software?

Because freight is not like catalog spend. A freight bid spans hundreds or thousands of lanes, each with its own rate, accessorials, and capacity, and awarding it well requires optimization across all of them at once. Generic sourcing tools choke on this lane-level complexity, which is why freight-native platforms exist.

Is there a Gartner Magic Quadrant for freight procurement?

No. There is no dedicated Gartner Magic Quadrant or Forrester Wave for freight procurement; Gartner assesses freight sourcing as a capability within its Magic Quadrant for Transportation Management Systems. Without a standalone scoreboard, references and a pilot bid on your own lanes carry more weight.

Who are the leading vendors?

It depends on the tier. AI-native sourcing specialists include Keelvar, GoodShip, and Pando; network-backed platforms include Transporeon, now part of Trimble, and C.H. Robinson Navisphere; TMS-embedded options include Oracle OTM, MercuryGate, and Manhattan; and generic suites include Coupa, SAP Ariba, and JAGGAER.

How big is the market?

It depends on the definition. Dedicated freight procurement software is sized near \$1.2B to \$1.7B in 2024 and grows in the low teens, while it is routinely conflated with broad procurement software at roughly \$8B to \$11B and with the larger freight management software market. The narrow figures are the most consistent baseline.

How do I know which tool I need?

Largely by your freight spend. Under ten million dollars, a structured RFP in a generic tool can suffice; between ten and a hundred million, AI bid analysis and scenario optimization pay off; above a hundred million with many lanes, autonomous and agentic sourcing becomes worthwhile. Match the tool to the spend.

What does it cost?

Pricing varies with freight spend, the number of sourcing events, and whether the tool is standalone, part of a network, or inside a TMS. A dedicated platform for a large shipper is a meaningful subscription plus a TMS integration project; sourcing within a TMS a shipper already runs can be cheaper but shallower.

How is agentic AI changing freight sourcing?

Agentic AI runs freight bids autonomously, negotiating with carriers and managing events with limited human input, with the freight-native specialists leading. It points toward continuous, machine-run sourcing rather than periodic manual bid events, though the capability is still maturing and should be judged on demonstrated results.

What is the most common reason these programs fail?

A tool that cannot handle the lane complexity, awarded rates that do not reach execution, a mismatch between the tool and the freight spend, and weak carrier participation. Almost none of the common failures are about the interface. Matching the tool to the spend and integrating sourcing with execution are the most important steps.

12. Recommendations

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

- 11. Size the program by freight spend first.** Let the scale of your freight spend set the level of tool, from a generic RFP for small programs to autonomous sourcing for very large ones, because fit to spend is the decisive variable.
- 12. Do not expect an analyst scoreboard.** Because there is no dedicated Magic Quadrant or Wave, lean on references with freight like yours and a pilot bid on your own lanes rather than a ranking.
- 13. Test optimization on your real lanes.** Run a pilot bid on a representative set of your lanes and constraints, because lane-level optimization is what separates freight-native tools from generic ones.
- 14. Integrate sourcing with execution.** Confirm that awarded rates flow cleanly into your TMS, because savings won in the bid are lost if shipments execute at the wrong rates.
- 15. Weigh freight-native depth against network and suite convenience.** Balance the optimization of a specialist against the carrier reach of a network or the integration of a TMS module, based on your spend and stack.
- 16. Treat ROI claims as a ceiling.** Model freight-cost savings on your own lanes and rates, and judge agentic and AI claims by demonstrated capability rather than roadmap.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, the Gartner Magic Quadrant for Transportation Management Systems, 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 diverge because dedicated freight procurement (around \$1.2B to \$1.7B in 2024) is conflated with broad procurement software (around \$8B to \$11B) and with the larger freight management software market. We present a range and treat the narrow figures as the most consistent baseline. Several sources are SEO-style market-research firms and are directional only; the broad procurement and TMS figures shown are representative.
- There is no dedicated Gartner Magic Quadrant or Forrester Wave for freight procurement; it is assessed inside the Transportation Management Systems quadrant. The landscape map in Figure 4 is our directional interpretation, not analyst coordinates.
- The spend bands in Figure 3 are a practical framework rather than precise thresholds; the right tool depends on lane complexity as well as spend. Freight-cost-savings figures are vendor and trade-sourced and treated as a ceiling.
- Vendor ownership and scope change quickly, including Trimble's acquisition of Transporeon and the rapid evolution of agentic capabilities among the AI-native specialists. Validate current details directly with vendors before any purchasing decision.

14. Sources

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- [9] Oracle. [Oracle Transportation Management freight sourcing.](#)

Additional figures drawn from: vendor disclosures from Transporeon (carrier and shipper counts and freight spend handled), Keelvar (funding and agentic bidding), and GoodShip (growth and customers); broad procurement and freight-management market sizing from multiple research firms (representative figures); and trade reporting on freight-cost savings. Freight-cost-savings and ROI claims are vendor or trade-sourced unless otherwise noted, and there is no dedicated Magic Quadrant for freight procurement.

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.