

SUPPLY CHAIN RESEARCH

Independent · vendor-neutral research

Supply Chain Planning Software

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting supply chain planning software: what these platforms do, how the market and vendors stack up in 2026, what they cost, 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.

Contents

- 1 Executive summary
- 2 What supply chain planning software is
- 3 The planning software market in 2026
- 4 The vendor landscape
- 5 How to evaluate a planning platform
- 6 Cost and pricing
- 7 Implementation: where programs succeed or fail
- 8 Trends shaping 2026
- 9 Segment-specific guidance
- 10 ROI and the business case
- 11 Frequently asked questions
- 12 Recommendations
- 13 Methodology and caveats
- 14 Sources

1. Executive summary

Supply chain planning (SCP) software is the analytical brain of the supply chain: the set of platforms that forecast demand, plan supply and production, optimize inventory, align the business through sales and operations planning (S&OP) and integrated business planning (IBP), and run the scenarios that keep a plan resilient when reality shifts. Gartner defines an SCP solution as the technology that lets a company manage, link, align, and share planning data across an extended supply chain, establishing a single version of the truth for planning decisions. Planning sits upstream of execution: it decides what should happen, and order, warehouse, and transportation systems carry it out.

This guide is written for supply chain, operations, and IT leaders evaluating a planning platform. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best platform, because the right system depends on your industry (discrete or process), planning maturity, and the depth of optimization you need. One structural change frames the 2026 landscape: Gartner split its long-running single Magic Quadrant for Supply Chain Planning Solutions into two separate editions, one for discrete industries and one for process industries, a signal that planning needs now diverge enough by industry to defeat a one-size comparison.

~\$10-13B core SCP software market in 2026, growing about 10-11% (AI-specific estimates run far higher)	6 Leaders Kinaxis, o9, Blue Yonder, SAP, Oracle, and OMP across Gartner's 2026 SCP quadrants	20% inventory reduction in a representative Kinaxis Maestro deployment (valantic)
--	---	--

What the evidence says

The leaders are consistent across both new quadrants. Kinaxis, o9, Blue Yonder, SAP, Oracle, and OMP are named Leaders across Gartner's 2026 Magic Quadrants for Supply Chain Planning Solutions, with Kinaxis a Leader for the eleventh consecutive time.

Gartner split the quadrant by industry in 2026. After a single SCP Magic Quadrant from 2021 to 2025, Gartner now publishes separate Discrete and Process editions, so your industry determines which comparison and which vendors are relevant.

Market sizing is definition-dependent. Core SCP software is roughly \$10B to \$13B in 2025-26 and a subset of the broader \$36B-plus SCM software market; AI-specific estimates project far higher growth.

Concurrent planning and AI define the shift. The move from sequential, siloed planning to concurrent planning on a single data model, now accelerated by AI, machine learning, and the first planning agents, is the defining change in the category.

It is a long, expensive commitment, and mid-market buyers overreach. Platforms commit you for 5 to 10 years, three-year total cost runs 3 to 7 times year-one license, and mid-market manufacturers who buy enterprise platforms often pay 2 to 3 times what they need and use 30 to 40 percent of the capability.

2. What supply chain planning software is

Planning software answers what should happen across the supply chain over time horizons from years to days. It is distinct from execution software, which carries plans out. Gartner frames modern planning around a CORE model, Configure, Optimize, Respond, and Execute, and describes the planning system as the decision repository and single version of the truth for an end-to-end supply chain. A useful test: planning decides how much to make, buy, move, and stock and when; execution systems then source the orders, run the warehouse, and move the freight.

Planning horizons and processes

- **Strategic (years):** supply chain network design, long-range capacity, and what-if structural planning.
- **Tactical (months to quarters):** S&OP and IBP, the cross-functional process that aligns demand, supply, and finance on one plan.
- **Operational (weeks to days):** demand planning and forecasting, supply and production planning, and inventory optimization.
- **Responsive (continuous):** scenario planning, demand sensing, and rapid replanning when a forecast, supplier, or constraint changes.

Core capabilities

- **Demand planning, forecasting, and demand sensing:** statistical and machine-learning forecasts refined with real-time demand signals.
- **Supply and production planning:** matching supply, capacity, and materials to demand across the network.
- **Inventory optimization:** multi-echelon optimization that sets the right buffers at the right nodes, often probabilistically.
- **S&OP and IBP:** a structured, consensus process linking operational plans to financial objectives.
- **Scenario planning and digital twin:** modeling disruptions and trade-offs before committing, on a digital representation of the supply chain.
- **Control tower, analytics, and AI:** end-to-end visibility, exception management, and increasingly autonomous recommendations.

How planning differs from adjacent systems

Planning is frequently confused with execution and with analytics, and the confusion drives buying mistakes. The table clarifies the boundaries.

System	What it owns	Relationship to planning
ERP	Transactions, finance, the system of record	Provides the data planning runs on; ERP planning modules are usually shallower than a dedicated SCP platform
Execution (OMS / WMS / TMS)	Sourcing orders, running the warehouse, moving freight	Carries out what planning decides; planning sits upstream
APS	Advanced planning and scheduling, often plant-level	A planning capability, sometimes a module, sometimes a point tool

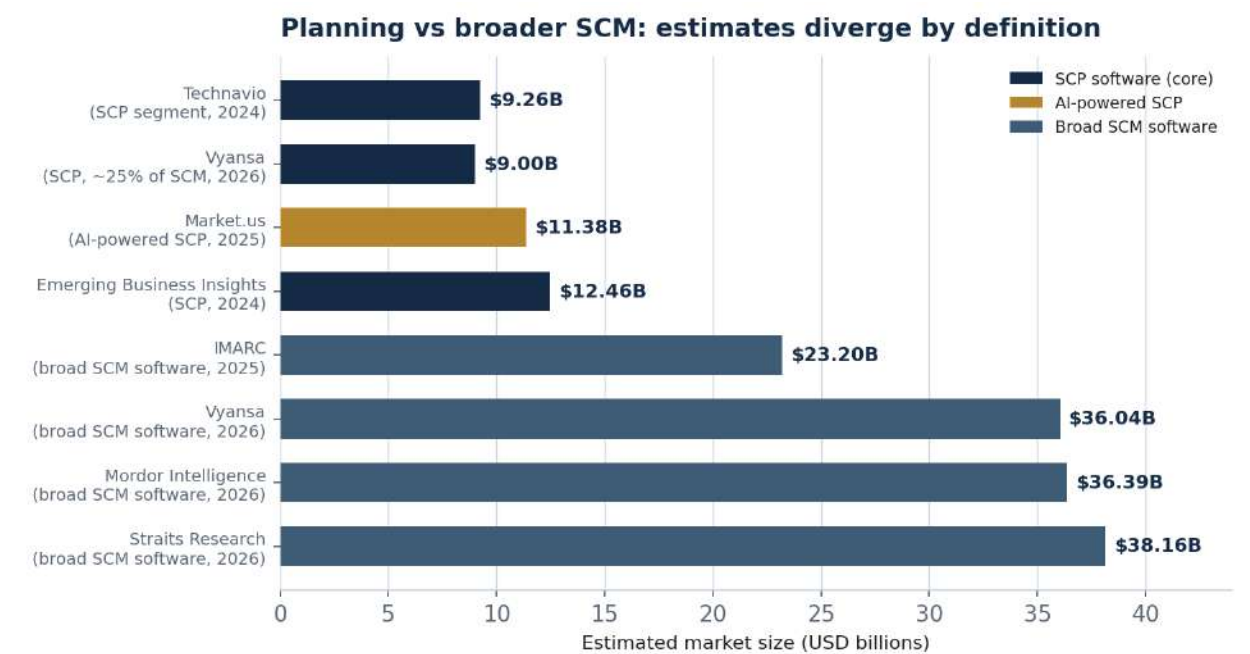
System	What it owns	Relationship to planning
BI / analytics	Reporting and dashboards on what happened	Describes the past; planning decides the future and optimizes it
Network design	Where to locate nodes and flows (strategic)	A strategic planning discipline; some SCP suites include it, some specialists focus on it

Concurrent versus sequential planning

The most consequential architectural distinction in planning is concurrent versus sequential. Traditional planning is sequential: demand, supply, inventory, and production are planned in separate systems in batches, with hand-offs and lag between them, so a change in one place takes days to ripple through the rest. Concurrent planning, the approach Kinaxis built its platform around, runs these functions on a single data model so a change is reflected everywhere at once, enabling fast, aligned what-if analysis. Most modern platforms now emphasize a unified data model and rapid scenario replanning; the degree to which planning is truly concurrent rather than a faster batch is worth probing directly in any evaluation.

3. The planning software market in 2026

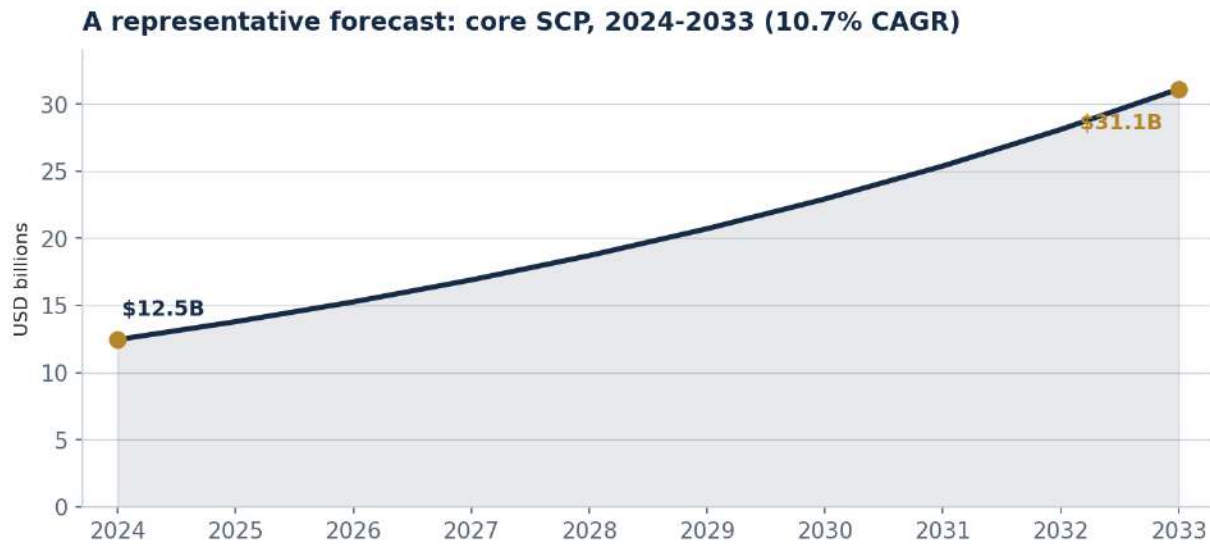
Supply chain planning is a large and fast-growing market, but it is a subset of the broader SCM software market, and sizing it precisely is difficult because firms draw the boundary differently. Some report core planning, some report the entire SCM software market, and some isolate AI-powered planning, which produces very different numbers. Treat the figures below as directional and anchor on the relationship between the segments rather than any single value.



Source: Supply Chain Research analysis of published estimates, 2024-2026. Core supply chain planning is a subset of the broader SCM software market.

Figure 1. Published estimates for core supply chain planning versus the broader SCM software market, 2024-2026.

Research firm	Scope	2024-26 size	CAGR
Technavio	SCP segment	\$9.26B (2024)	part of 15.2%
Vyansa	SCP (~25% of SCM)	~\$9.0B (2026)	11.3%
Market.us	AI-powered SCP	\$11.38B (2025)	35.7%
Emerging Business Insights	SCP software	\$12.46B (2024)	10.7%
IMARC	Broad SCM software	\$23.2B (2025)	10.0%
Mordor Intelligence	Broad SCM software	\$36.39B (2026)	9.0%
Straits Research	Broad SCM software	\$38.16B (2026)	9.4%



Source: Emerging Business Insights, 2025 (core SCP). AI-specific SCP estimates run far higher, to 35%+ CAGR.

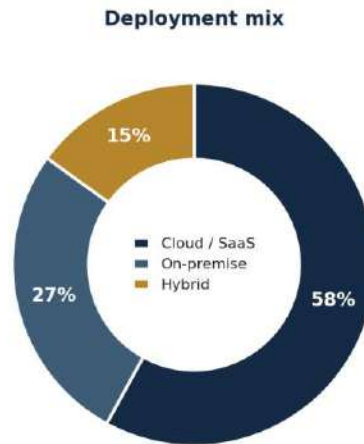
Figure 2. A representative trajectory for core SCP at about 10.7% CAGR. AI-specific cuts of the market project far higher.

Why the estimates diverge

The spread is a boundary problem. Core SCP software sits in the low tens of billions of dollars and represents roughly a quarter of the broader SCM software market, which is itself in the mid-to-high thirties of billions in 2026. AI-powered planning is a fast-growing slice that some firms project at 35 percent or more, reflecting how quickly AI is being added rather than a different underlying market. For planning, anchor on core SCP at low-double-digit growth, and treat the AI-specific figures as a signal of where investment is flowing.

Regions, deployment, and verticals

North America leads, at roughly 38 percent of demand, with Asia-Pacific the fastest-growing region. Cloud and SaaS now account for the majority of the market, hybrid is the fastest-growing deployment as enterprises balance control and flexibility, and large enterprises retain on-premise estates where customization and data control dominate. The heaviest-adopting verticals are consumer goods and FMCG, discrete and process manufacturing, retail and grocery, life sciences, and high-tech, each of which stresses different planning capabilities.



Cloud leads and hybrid is growing fastest; large enterprises retain on-premise estates. Source: SCRI synthesis, 2025-2026.

Figure 3. Deployment mix. Cloud leads and hybrid is growing fastest.

Drivers and restraints

- **Drivers:** supply chain volatility and the demand for resilience, AI and machine learning, traceability and sustainability regulation (UFLPA, CSRD), the shift from periodic to continuous planning, and cloud economics that put advanced planning within reach of mid-market firms.
- **Restraints:** high cost and long implementations, demanding master-data quality, organizational change and planner adoption, and the difficulty of integrating planning with ERP and execution.

4. The vendor landscape

The planning field spans broad enterprise platforms, deep optimization specialists, and retail and mid-market players. This section profiles the vendors that matter in 2026, grouped by the role they play. Each profile is vendor-neutral and notes both strengths and limitations, because the right platform depends on your industry and planning needs.

What the analysts say

Gartner's Magic Quadrant for Supply Chain Planning Solutions is the anchor evaluation, and 2026 brought a structural change.

- **A single SCP Magic Quadrant ran from 2021 to 2025**, evaluating Anaplan, Arkieva, Blue Yonder, Board, Coupa, Dassault, e2open, ICRON, John Galt, Kinaxis, Logility, Manhattan, o9, OMP, Oracle, QAD, RELEX, SAP, Slimstock, and ToolsGroup against Gartner's CORE model.
- **For 2026, Gartner split the quadrant into Discrete and Process editions.** The Discrete edition covers Blue Yonder, Board, Coupa, Dassault, E2open, Eyelit, GAINS, ICRON, John Galt, Kinaxis, o9, Oracle, PTC, SAP, Slimstock, and ToolsGroup; the Process edition covers Blue Yonder, Coupa, Dassault, Infor, John Galt, Kinaxis, o9, OMP, Oracle, QAD, RELEX, SAP, and Sunstice.
- **Across both 2026 editions, the Leaders are Kinaxis, o9, Blue Yonder, SAP, Oracle, and OMP.** Gartner does not endorse any vendor, and placements should be read in the context of the full reports.



Figure 4. Supply chain planning vendor positioning, structured after Gartner's 2025-2026 Magic Quadrants. Placements are SCR's directional interpretation, not exact analyst coordinates.

Enterprise leaders

Kinaxis (Maestro)

A Gartner Leader for the eleventh consecutive time and the standard-bearer for concurrent planning. Kinaxis Maestro (the platform formerly known as RapidResponse) runs demand, supply, inventory, and S&OP on a

single data model, with control-tower visibility, scenario analysis, and S&OP and IBP built in. Customers include Lenovo, ExxonMobil, Volvo Cars, Clorox, Procter and Gamble, Nikon, and IBM, spanning consumer products, chemicals, automotive, and life sciences. Licensing commonly runs from roughly \$250K to more than \$1M per year, with mid-market packages near \$20K per month and implementation adding 15 to 40 percent of the license. A representative deployment cited a 20 percent inventory reduction with improved long-term planning accuracy.

o9 Solutions (Digital Brain)

A Gartner Leader recognized for an AI-powered platform and a visionary approach to enterprise planning. The o9 Digital Brain is built on an enterprise knowledge graph that connects demand, supply, and commercial planning, with strong AI and machine-learning capabilities. AT&T, for example, used o9 to drive more accurate forecasts, reduce manual planning effort, and improve exception handling. Pricing is custom and scales with deployment size and data complexity.

Blue Yonder (Luminate Planning / Cognitive Solutions)

A Gartner Leader recognized for 12 years across the various SCP quadrants. Blue Yonder's AI-driven, cloud-native planning spans demand, inventory, and supply, and is especially strong in demand sensing for fast-moving consumer goods. In January 2026 Blue Yonder launched Cognitive Solutions for retail with planning agents that optimize inventory and forecasts in near real time, and during the 2025 Thanksgiving peak it processed 1.2 billion SKUs for delivery estimates.

SAP Integrated Business Planning (IBP)

A Gartner Leader and the natural choice for organizations already running SAP, where native integration with S/4HANA and finance data outweighs a best-of-breed alternative. SAP IBP covers demand, supply, inventory, response, and S&OP on a cloud platform.

Oracle Fusion Cloud Supply Chain Planning

A Gartner Leader integrated across Oracle's Fusion Cloud applications, covering demand, supply, sales and operations, and replenishment planning. It is a strong shortlist candidate for organizations standardized on Oracle.

OMP (Unison Planning)

A Gartner Leader with particular strength in process industries such as chemicals, consumer goods, and metals. OMP's Unison Planning emphasizes a unified model across planning processes and deep industry templates, which is why it features prominently in the Process edition of the 2026 quadrant.

Deep specialists

Anaplan

A cloud platform for connected planning that spans supply chain, sales, and financial planning on one modeling engine. Anaplan's breadth across business planning is its differentiator; buyers focused purely on deep supply optimization should compare it against planning-specialist depth.

Dassault Systemes (Quintiq)

Part of the DELMIA portfolio, Quintiq is known for complex optimization and detailed scheduling in asset-intensive and logistics-heavy operations, a fit where mathematical optimization depth is the priority.

ToolsGroup

Best known for probabilistic forecasting and multi-echelon inventory optimization through its SO99+ product, ToolsGroup suits organizations whose core challenge is service-level-driven inventory under uncertainty.

Retail and mid-market

RELEX Solutions

A retail and grocery specialist strong in demand forecasting, replenishment, and space and workforce planning, with a unified model well suited to high-SKU, perishable, and promotion-driven environments.

Other capable players include **Logility** (the Decision Intelligence Platform, mid-market and increasingly AI-driven), **John Galt Solutions** (the Atlas Planning Platform, mid-market), **GAINS** and **Slimstock** (inventory and supply optimization, Slimstock via Slim4), **Coupa** (supply chain design and planning, building on its LLamasoft acquisition), and **Board**, **ICRON**, **Arkieva**, **QAD**, **PTC**, **Infor**, **FuturMaster**, and **Blue Ridge**, several of which appear in the 2026 Gartner editions and fit specific industries or company sizes.

Vendor summary

The table is an orientation aid, not a scorecard. Use it to frame a shortlist, then evaluate candidates against the framework that follows, weighting industry fit (discrete or process) heavily.

Vendor	Tier	Best fit	Notes
Kinaxis	Enterprise	Concurrent planning, complex SC	11x Leader; Maestro; single data model
o9 Solutions	Enterprise	AI-led enterprise planning	Leader; Digital Brain, knowledge graph
Blue Yonder	Enterprise	FMCG, demand sensing, retail	Leader; Cognitive Solutions and planning agents
SAP IBP	Enterprise	Existing SAP estates	Leader; S/4HANA-native
Oracle	Enterprise	Existing Oracle estates	Leader; Fusion Cloud SCP
OMP	Enterprise	Process industries	Leader; Unison Planning
Anaplan / Dassault	Specialist	Connected planning / optimization	Breadth and deep optimization respectively
ToolsGroup	Specialist	Probabilistic inventory	SO99+; service-level driven
RELEX	Retail	Retail and grocery	Demand, replenishment, space
Logility / John Galt	Mid-market	Mid-market planning	Decision Intelligence / Atlas

5. How to evaluate a planning platform

Because the leading platforms are broadly capable, the most common selection mistake is choosing on brand or demo polish. Score every shortlisted vendor against the same defined dimensions, weighted for your industry and planning maturity. A process manufacturer and a discrete electronics maker evaluating the same vendors should reach different answers, which is precisely why Gartner split its quadrant.

The five evaluation dimensions

1. **Process and horizon fit.** Does the platform natively cover the planning you need, demand, supply, inventory, S&OP and IBP, and response, across the horizons you operate, from network design to daily replanning?
2. **Planning depth and analytics.** Assess the depth of optimization (multi-echelon inventory, constrained supply, probabilistic forecasting) and the maturity of AI and machine learning, not just the presence of a dashboard.
3. **Data model and architecture.** Probe how concurrent the platform truly is, whether it runs on a single data model, and how cleanly it integrates with your ERP and execution systems. This determines replanning speed and the cost of change.
4. **Total cost and commercial model.** Look past year-one license to the multi-year total, and right-size: do not buy enterprise depth you will use at 30 to 40 percent.
5. **Viability, proof, and industry fit.** Weigh financial stability and roadmap, demand references in your industry with quantified results, and use the discrete or process distinction to focus the shortlist.

Discrete versus process fit

The 2026 quadrant split is a practical guide. Discrete industries (electronics, automotive, industrial, high-tech) emphasize bills of material, component availability, and configurable products. Process industries (chemicals, food and beverage, consumer goods, pharmaceuticals) emphasize recipes, yield, shelf life, and shared capacity. Some vendors are strong in both; others are clearly oriented to one. Start the shortlist from the edition that matches your industry.

Best-of-breed versus ERP-suite planning

ERP-embedded planning (SAP IBP, Oracle) offers tight integration and a single vendor; best-of-breed specialists (Kinaxis, o9, Blue Yonder, OMP) typically offer deeper planning capability and faster innovation. Organizations on a single ERP often weigh integration simplicity against planning depth; many large enterprises choose a best-of-breed planning layer on top of their ERP.

A selection process that works

6. **Define your planning processes, horizons, and industry profile** (discrete or process, SKU and node complexity, planning maturity).
7. **Shortlist three to four candidates** from the relevant Gartner edition; cross-category comparisons waste evaluation time.
8. **Score against the five dimensions** with a weighted scorecard so every vendor is compared on the same basis.
9. **Run a proof of concept on your own data**, testing forecast accuracy, replanning speed, and scenario analysis on real history.

10. Check references in your industry and model multi-year total cost, then decide and plan the implementation before signing.

6. Cost and pricing

SCP pricing is typically subscription-based and custom, scaling with deployment size, users, data complexity, and modules, with some vendors offering enterprise licenses. The dominant budgeting truth is that planning is a multi-year platform commitment whose total cost is driven far more by implementation, internal team, and ongoing consulting than by the license line alone.

Cost element	Indicative figure	Notes
Enterprise license (e.g., Kinaxis)	~\$250K-\$1M+/yr	Scales with users, data, and modules
Mid-market subscription	~\$20K/month	Smaller scope; some agile deployments in 4-8 weeks
Implementation	+15-40% of license	Higher for complex, multi-process rollouts
Three-year TCO	3-7x year-one license	Includes implementation, internal team, consulting
Mid-market overreach	2-3x what is needed	Often only 30-40% of capability is used

What drives cost, and the platform-commitment reality

The variables that move the total are the number of planning processes deployed, model and data complexity, the degree of customization, and the size of the internal planning and IT team the program requires. Because a planning platform typically commits a company for 5 to 10 years, the right lens is multi-year total cost of ownership, not the first invoice. Mid-market organizations should be especially disciplined: buying an enterprise platform you will use at a fraction of its depth is a common and expensive mistake, while large enterprises that buy mid-market tools often hit scale limits within 18 to 24 months. Match the platform to your complexity, not your ambition.

Most vendors gate pricing and quote custom subscriptions; confirm via direct quotes, and model the internal-team and consulting cost explicitly, because it usually dwarfs the license.

7. Implementation: where programs succeed or fail

Selection is the consequential decision; implementation is where the value is realized or lost. Focused, single-process deployments can go live in 4 to 8 weeks (Kinaxis cites agile rollouts in that range); broad, multi-process enterprise programs run 12 to 18 months or more. The timeline matters less than the discipline, because the failure modes are about data, scope, and adoption rather than software quality.

Why programs fail

- **Master data and data quality are underestimated**, the single most common cause; planning is only as good as the data it runs on.
- **Scope is too broad too soon**, instead of sequencing from one process (usually demand planning) outward.
- **Model complexity outruns the team**, when configuration tries to mirror every nuance instead of planning value first.
- **Change management and planner adoption are neglected**, leaving planners distrustful of the new system and reverting to spreadsheets.

SCP-specific failure data is limited, so the figures below are enterprise-software and ERP analogs. They likely overstate SCP-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)	4-8 wks to 12-18 mo go-live, from a single process to a full enterprise rollout
---	--	--

Three principles that separate success from failure

Fix the data first. Clean master data and history before go-live; a sophisticated model on poor data produces confident, wrong plans.

Sequence the processes. Start with demand planning, prove forecast accuracy, then extend to supply, inventory, S&OP, and response in waves.

Win the planners. Explain the recommendations, train deeply, and build trust; adoption, not configuration, decides whether the ROI lands.

The role of an implementation partner

Enterprise planning programs are rarely run by the software vendor alone. Experienced implementation partners (the vendor's services arm or specialist consultancies) handle data, modeling, and configuration, and an independent partner can also keep scope honest and validate the vendor's plan. Treat partner selection with the same rigor as software selection, and confirm the partner has done your industry and your platform before.

A phased rollout

The lowest-risk pattern sequences value rather than attempting a single cutover. Stand up demand planning first and prove forecast-accuracy gains, then add supply and inventory optimization, then S&OP and IBP, then

response and scenario planning. Each wave delivers measurable value and builds the data foundation and organizational trust the next wave depends on.

8. Trends shaping 2026

AI, machine learning, and agentic planning

AI has moved into the core of planning. Vendors are shipping machine-learning demand forecasting and sensing, generative-AI copilots that let planners query and adjust plans in natural language, and the first planning agents that recommend or execute decisions within guardrails. Blue Yonder's 2026 Cognitive Solutions optimize inventory and forecasts in near real time, and the broader market narrative is a shift toward autonomous, self-healing supply chains.

Concurrent planning and the end of sequential batch

The structural shift from sequential, siloed planning to concurrent planning on a single data model continues to define the category. The payoff is speed: when demand, supply, and inventory share one model, a change ripples through instantly and scenarios can be evaluated in minutes rather than days.

From S&OP to integrated business planning

Organizations are maturing from operational S&OP toward integrated business planning that links the supply chain plan to financial and commercial objectives. The platforms increasingly support this end-to-end, connecting volume and value in one process.

Scenario planning, digital twins, and probabilistic methods

Persistent volatility has made scenario planning and digital twins central rather than optional, and probabilistic forecasting and demand sensing are displacing single-number forecasts. The ability to model a disruption and replan quickly is now a primary buying criterion.

Industry specialization

Gartner's 2026 split into Discrete and Process editions reflects a real divergence: planning requirements now differ enough by industry that vendors are specializing, and buyers should evaluate within their industry rather than against a single, blended field.

9. Segment-specific guidance

The right planning platform depends heavily on industry. The table summarizes what tends to dominate the decision by profile; the notes that follow add detail.

Operating profile	What matters most	Vendors that fit
CPG / FMCG	Demand sensing, promotions, high volume	Blue Yonder, Kinaxis, o9, OMP
Discrete manufacturing	BOM, component availability, configurability	Kinaxis, o9, SAP, Oracle, ToolsGroup
Process manufacturing	Recipes, yield, shelf life, shared capacity	OMP, Blue Yonder, Kinaxis, o9, Infor
Retail / grocery	Forecasting, replenishment, perishability	RELEX, Blue Yonder, o9
Life sciences / pharma	Compliance, traceability, constrained supply	Kinaxis, o9, SAP, OMP
Mid-market	Right-sized depth, faster deployment, value	Logility, John Galt, RELEX, Slimstock

Consumer goods and FMCG operations live or die on demand sensing and promotion planning at high volume. **Discrete manufacturers** need bill-of-material and component-availability planning and benefit from concurrent platforms. **Process manufacturers** need recipe, yield, and shelf-life planning, where OMP and other process specialists are strong. **Retailers and grocers** prioritize forecasting and replenishment across many perishable SKUs, the home turf of RELEX. And **mid-market firms** should resist over-buying, choosing right-sized depth and faster deployment over enterprise breadth they will not use.

10. ROI and the business case

Planning ROI concentrates in inventory, service, and productivity. Vendor-sourced figures should be validated against your own baseline, but the direction is consistent: better forecasts and aligned, concurrent plans free working capital while improving availability.

~20% inventory reduction in a representative Kinaxis Maestro deployment (valantic)	Fewer stockouts and more stable inventory after o9 adoption at AT&T	3-6 mo payback cited by some vendors for focused deployments (validate locally)
--	---	---

The value levers

A credible business case usually rests on several levers that compound. Higher forecast accuracy reduces both safety stock and stockouts at once. Multi-echelon inventory optimization frees working capital by placing the right buffers at the right nodes. Better service levels and fill rates protect revenue and customer relationships. Reduced expediting and fewer emergency freight moves cut cost that rarely shows up in a forecast-accuracy metric. Planner productivity rises as automation and AI remove manual data wrangling, and better S&OP and IBP decisions align the supply chain with financial goals. The most reliable business case is built on your own inventory, service, and expediting baseline, with vendor figures used only to size the opportunity.

Use a simple frame: ROI equals annual benefit (freed inventory carrying cost, recovered sales, reduced expediting, and labor savings) minus annual platform and run cost, divided by that cost. Given multi-year commitments and 3-to-7-times-license total cost, build the case over a three-to-five-year horizon rather than year one.

11. Frequently asked questions

What is supply chain planning software?

Software that forecasts demand, plans supply and production, optimizes inventory, aligns the business through S&OP and IBP, and runs scenarios. It establishes a single version of the truth for planning decisions and sits upstream of execution systems.

How is planning different from ERP?

ERP is the transactional system of record; planning is the analytical layer that decides how much to make, buy, move, and stock and when. ERP planning modules are usually shallower than a dedicated SCP platform, which is why many enterprises run a best-of-breed planning layer on top of ERP.

How is planning different from execution (OMS, WMS, TMS)?

Planning decides what should happen; execution systems carry it out. Order management sources orders, the warehouse system runs the warehouse, and the transportation system moves freight, all downstream of the plan.

What is concurrent planning?

Running demand, supply, inventory, and production on a single data model so a change is reflected everywhere at once, rather than in separate systems with batch hand-offs and lag. It enables fast, aligned scenario analysis.

What are S&OP and IBP?

Sales and operations planning (S&OP) is the cross-functional process that aligns demand and supply on one plan; integrated business planning (IBP) extends it to link operational plans with financial and commercial objectives.

Does the discrete-versus-process distinction matter?

Yes. Gartner split its 2026 quadrant into Discrete and Process editions because planning needs diverge: discrete industries emphasize bills of material and components, process industries emphasize recipes, yield, and shelf life. Start your shortlist from the edition that matches your industry.

What does planning software cost?

Enterprise licenses commonly run \$250K to more than \$1M per year (Kinaxis as a reference), with mid-market subscriptions near \$20K per month and implementation adding 15 to 40 percent. Three-year total cost typically runs 3 to 7 times year-one license.

How long does it take to implement?

From 4 to 8 weeks for a focused, single-process deployment to 12 to 18 months or more for a broad enterprise rollout. Master-data quality and scope drive the timeline more than the software.

Best-of-breed or ERP-suite planning?

ERP-embedded planning (SAP IBP, Oracle) offers integration and a single vendor; best-of-breed specialists (Kinaxis, o9, Blue Yonder, OMP) typically offer deeper capability and faster innovation. Many large enterprises layer a best-of-breed planning platform on their ERP.

How much can planning software save?

Representative deployments cite inventory reductions around 20 percent alongside service-level gains and planner-productivity improvements. Validate against your own inventory, service, and expediting baseline before committing.

12. Recommendations

- 11. Shortlist from your industry edition, not a blended list.** Discrete manufacturers and electronics, automotive, and high-tech firms should evaluate Kinaxis, o9, SAP, Oracle, and ToolsGroup; process manufacturers in chemicals, food and beverage, and pharma should weigh OMP, Blue Yonder, Kinaxis, and o9; retailers and grocers should look at RELEX and Blue Yonder; mid-market firms should consider Logility, John Galt, and Slimstock.
- 12. Weigh best-of-breed depth against ERP-suite integration.** If you run a single ERP, decide deliberately between SAP IBP or Oracle for integration and a best-of-breed planning layer for depth.
- 13. Probe concurrency and the data model directly.** Test how fast the platform replans and whether it runs on a single model, because that determines scenario speed and the cost of change.
- 14. Right-size the platform to your complexity.** Mid-market buyers should avoid paying 2 to 3 times for enterprise depth they will use at 30 to 40 percent; large enterprises should avoid mid-market tools that hit scale limits within two years.
- 15. Treat data and adoption as the program.** Clean master data before go-live, sequence from demand planning outward, and invest in planner training and change management, where most of the ROI is won or lost.

13. Methodology and caveats

- **Market sizing diverges by definition** (core SCP roughly \$10B to \$13B versus a broader SCM software market above \$36B in 2026); all figures are directional, and several estimates come from firms whose methodologies are not public.
- **ROI and savings figures are often vendor- or partner-sourced** (Kinaxis, valantic, o9 case studies) and should be validated against your own baseline before use in a business case.
- **Implementation-risk statistics are ERP and enterprise-software analogs** (Gartner, RubinBrown/Deloitte), not SCP-specific, and likely overstate SCP-specific risk.
- **Analyst placements come from Gartner's Magic Quadrant for Supply Chain Planning Solutions** (a single edition 2021-2025, and separate Discrete and Process editions for 2026). The quadrant in Figure 4 is SCR's directional interpretation, not a reproduction of any Gartner chart, and Gartner does not endorse any vendor.
- **Product and pricing details are accurate as reported** at the time of writing; roadmaps evolve and most vendor pricing is gated and custom, so confirm via direct quotes.

14. Sources

- [1] Emerging Business Insights (2025). [Supply Chain Planning Software Market](#). \$12.46B (2024) to \$30.13B by 2033, 10.7% CAGR.
- [2] Market.us (Jan 2026). [AI-Powered Supply Chain Planning Software Market](#). \$11.38B (2025) to \$240.96B by 2035, 35.7% CAGR; NA 38.3%.
- [3] Mordor Intelligence (2026). [Supply Chain Management Software Market](#). \$36.39B (2026) to \$56.01B by 2031.
- [4] Straits Research (2026). [Supply Chain Management Software Market](#). \$38.16B (2026), 9.37% CAGR.
- [5] IMARC Group (2025). [Supply Chain Management Software Market](#). \$23.2B (2025); NA 39.2% share.
- [6] Technavio (2026). [Supply Chain Management Software Market](#). SCP segment \$9.26B in 2024.
- [7] Kinaxis (May 2025). [Named a Leader in the 2025 Gartner Magic Quadrant for SCP Solutions \(11th time\)](#).
- [8] o9 Solutions (2025). [Named a Leader in the 2025 Gartner Magic Quadrant for SCP Solutions](#).
- [9] Kinaxis (2026). [Gartner Magic Quadrant for SCP Solutions, Discrete and Process editions](#).
- [10] Blue Yonder (2026). [2026 Gartner Magic Quadrant for SCP Solutions \(Leader, 12 years\)](#).
- [11] Horizon Solutions (2026). [Best Supply Chain Planning Software 2026 \(TCO and Leaders\)](#).
- [12] Torg (2026). [10 Best Supply Chain Planning Software \(pricing; AT&T on o9\)](#).
- [13] valantic (2026). [Kinaxis Maestro case \(20% inventory reduction\)](#).

Additional figures drawn from: Vyansa Intelligence (SCM sizing and the SCP share of SCM); Gartner Magic Quadrant for Supply Chain Planning Solutions (2021-2025) and the 2026 Discrete and Process editions; and vendor materials for Kinaxis, o9, Blue Yonder, SAP, Oracle, and OMP. Vendor capability and customer claims are vendor-stated unless otherwise noted. Gartner does not endorse any vendor, product, or service depicted in its research.

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.