Supply Chain Visibility Platforms

RETAIL

ESP Vendor Assessment Matrix
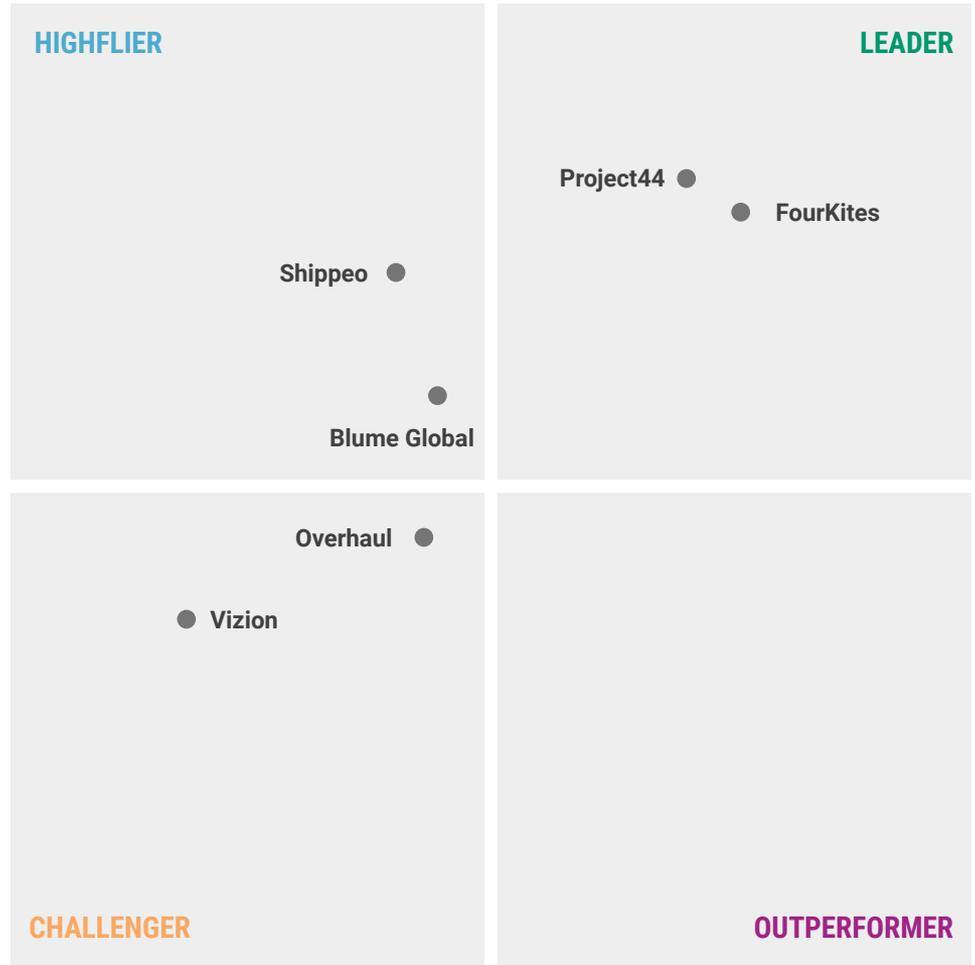
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ESP Vendor Assessment Matrix

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Market Need & Traction

What are supply chain visibility platforms?

Supply chain visibility platforms compile and analyze real-time data across the shipping journey to provide end-to-end shipment visibility across industry applications, including retail.

Who's buying it

Function/business unit	Title
Supply Chain	VP/Director of Supply Chain Automation
Operations	VP/Director of Fulfillment, VP/Director of Store Operations
IT	VP/Director of Inventory Management, Replenishment
Strategy & Innovation	VP/Director

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Why now?

Retailers are facing unprecedented supply chain disruption, driven by labor shortages, port congestion, and the ongoing pandemic. Supply chain visibility platforms allow retailers to more effectively respond to and recover from disruption, while also helping them identify inefficiencies along the shipping journey.

Typical product features/functions

- Real-time asset tracking
- Condition monitoring
- Order and inventory visibility
- Workflow automation

- Predictive, dynamic ETAs
- Supplier visibility
- 3PL and carrier data integration
- Risk management

What outcomes can you expect?

- On-time delivery improvements

- Reduction in late penalties, fines, emergency costs, and labor costs

- Customer service improvements

- Lower penalties related to late arrivals

- Lower direct and indirect logistics costs

- Accurate real-time location and condition information

- Data standardization

Market Data

Market size

The **supply chain analytics** is slated to reach $8.8B by 2025.

Funding

Driven by strong demand for supply chain visibility solutions, funding to supply chain visibility platforms reached a new peak in 2021 at $589M across 8 deals.

Recent exit activity

Clearmetal was acquired by Project44 in May 2021.

BluJay Solutions was acquired by E2open in May 2021.

Blue Yonder was acquired by Panasonic for $7.1B in March 2021

Supply chain visibility funding reaches record high

Disclosed deal & equity funding ($M), 2017 - 2021 YTD (12/21/2021)

Company Profiles

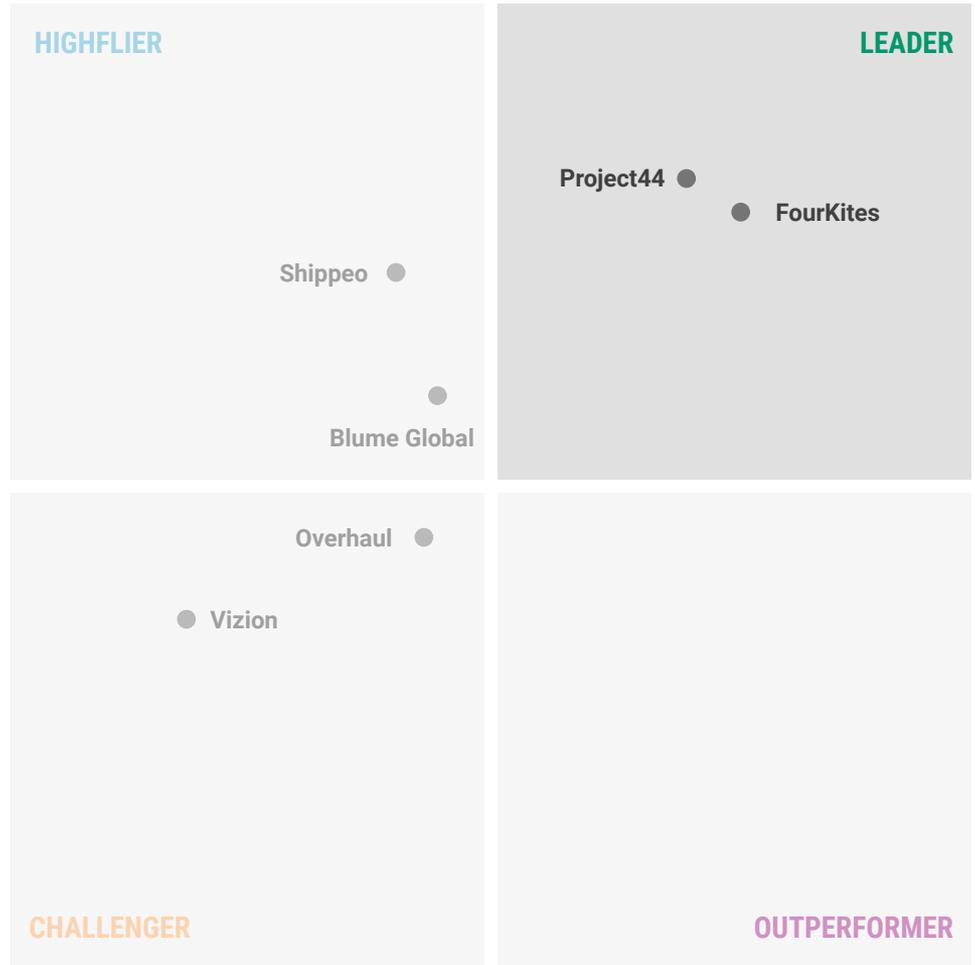# Supply Chain Visibility Platforms

RETAIL

LEADER

ESP Vendor Assessment Matrix

HIGHFLIER

LEADER

EXECUTION STRENGTH

Project44

FourKites

Shippeo

Blume Global

Overhaul

Vizion

CHALLENGER

OUTPERFORMER

MARKET STRENGTH

CBINSIGHTS

project44

Company/ product factsheet

Product description

Project44 provides a network of web service APIs that facilitate real-time information flow between global supply chain partners. The company's cloud-based advanced visibility platform aggregates data across shippers, logistics providers, and carriers across geographies and modes of transport.

Competitive positioning

Project44 is a leader in the supply chain visibility space given its robust set of APIs and integration tools, as well as its comprehensive offering in terms of modes of transport. The company is also building out its capabilities and presence across the supply chain journey through its recent acquisitions.

Partnerships

Blue Yonder
Infor
Oracle
SAP

Integrations

DreamOrbit
Carrier Direct
Aptude

CBINSIGHTS

LEADER

project44 | CB Insights viewpoint

Founded	HQ	Total raised	Estimated valuation	Last raised date	Last raised amount	Stage
2014	United States	$509M	$1.2B	Sept 2021	$116M	Unattributed VC

Analyst spotlight

Project44's market strength is evidenced by major retailer clients such as Amazon and Walmart as well as 600+ other brands across industries. As an API-driven solution, it has established a comprehensive set of partnerships with over 450K+ carriers and integrations — including hundreds of TMS, ERP and supply chain technologies — to streamline data ingestion. Its execution strength is demonstrated by $509M in disclosed funding, 70% year-over-year headcount growth, and 25 recent senior management hires. Project44 has made 2 acquisitions — ClearMetal and Ocean Insights — to date in 2021 to expand its product offering.

project44

Market strength

Commercial outcomes

NOTABLE CLIENTS

Amazon

Starbucks

Walmart

Dollar General

Walgreens

Execution strength

Sales model and go-to-market strategy

NOTABLE PARTNERS

SAP

Reliance Partners

NOTABLE HEADLINES

"Project44 Expands Network Coverage in China for Real-Time Transportation Visibility"

Financial Post

"Project44 adds air, ocean freight visibility to platform"

FrieghtWaves

LEADER

project44

"As the largest consumer goods retailer in Denmark, we've been looking for a visibility partner who will provide us with a single complete view of all the transports and help us improve operational efficiencies. project44 delivers just that. With more high-quality contextualized data, we can track every shipment and conditions around it and, as a result, better meet service goals towards our stores."

Kennet Thorsen
Former Senior Distribution Manager, **Coop Denmark A/S**

"Now, we're working with project44 and our colleagues at IBM to be able to pull in data for shipment visibility, order visibility, and inventory visibility. Our ability to pivot, and to leverage our data, has allowed us to win more trust. We have continued to be successful as a business. We got praise from our customers for being able to schedule orders quickly, pick the right logistics lanes, and deliver early or on time."

Tejuan Manners
Executive Director of Infrastructure Solutions Group Strategic Transformation Operations, **Lenovo**

Company/product factsheet

View profile on CBINSIGHTS

Product description

FourKites' software optimizes supply chain logistics by combining real-time shipment tracking with integrated operations and analytics capabilities. Its solutions help retail, CPG, and pharmaceutical customers keep up with changes in critical demand, mitigate disruption, and protect products in transport. FourKites tracks over 2M shipments daily.

Competitive positioning

FourKites is the largest supply chain visibility provider (500+ employees) in the US and is used by over 170 companies around the globe. The company has first-mover advantage and has expanded beyond transportation to yards, warehouses, and stores. Its customers include some of the leading CPG and food and beverage companies.

Partnerships
Rider Systems
Telogis
TomTom

Integrations

IBM
o9
Oracle

CB Insights viewpoint

Founded	HQ	Total raised	Estimated valuation	Last raised date	Last raised amount	Stage
2014	United States	$203M	$711M	Mar 2021	$100M	Series D

Analyst spotlight

FourKites provides one of the most complete end-to-end supply chain visibility solutions on the market. Though the company primarily targets CPG and food companies, it has a substantial client base of blue chip retail companies such as Walmart, Best Buy, and PetSmart. With over 600 clients to date and expanded capabilities such as yard management, the company is slated to continue its current growth trajectory.

LEADER

Market strength

Commercial outcomes

NOTABLE CLIENTS

Best Buy

Family Dollar

Michaels

PetSmart

Walmart

Execution strength

Sales model and go-to-market strategy

NOTABLE PARTNERS

o9 Solutions

MercuryGate

Zebra Technologies

NOTABLE HEADLINE

"Supply Chain Visibility Platform FourKites Intros New Time to Value Tools"

PYMTS.com

LEADER

"The data available on the FourKites platform helps PetSmart Transportation maximize carrier utilization and supports our goal of becoming a shipper of choice. Visibility to support network optimization is invaluable by supporting the efficient flow of goods through our supply chain while reducing costs for the company."

Dawn Goudie
Senior Manager, Supply Chain Service Center, **PetSmart**

"One of our core values is continuous improvement. FourKites shares that philosophy and has been the right provider to help us enhance our service to one of Averitt's longest-standing and most valued customers."

Nick Fields
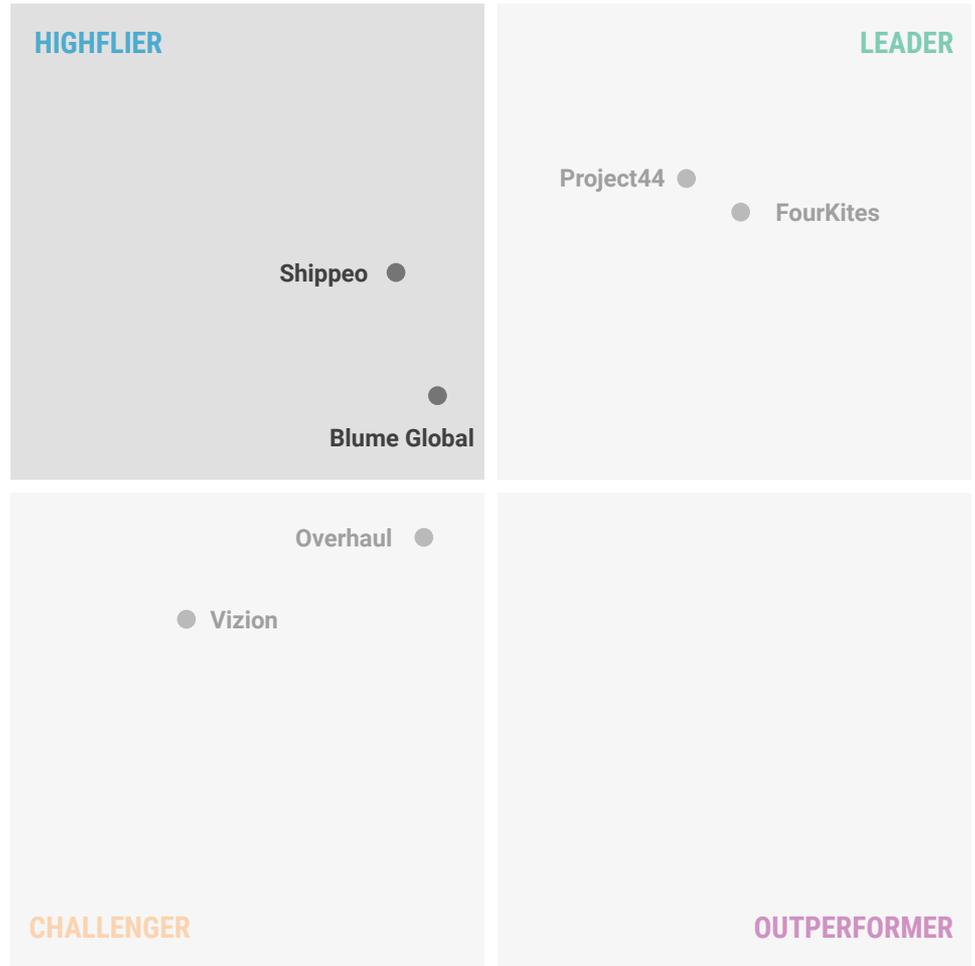*Director of Analysis Administration,* **Averitt**

Supply Chain Visibility Platforms

RETAIL

HIGHFLIER

ESP Vendor Assessment Matrix

SHIPPEO

Company/ product factsheet

Product description

Shippeo's supply chain visibility platform provides customers with access to predictive, real-time information about shipments. The platform's AI-based ETA algorithm helps shippers more accurately predict issues.

Competitive positioning

Shippeo is the largest supply chain visibility platform in Europe. Although the company's geographic reach is relatively limited, its product is superior in terms of its dynamic ETA calculations and data quality. The company has also taken an API-first approach, which has proven to be a competitive advantage in this space.

Partnerships

Volvo
Verizon Connect
Trimble

Integrations

Alpega
SAP
Oracle

CB Insights viewpoint

Founded	HQ	Total raised	Estimated valuation	Last raised date	Last raised amount	Stage
2014	France	$68M	N/A	Jan 2021	$32M	Series C

Analyst spotlight

Shippeo is the largest supply chain visibility network in Europe, with connections to over 850 TMS, telematics, and parcel API partners. The company also works with more than 140,000 carriers and has a presence in 75 countries. That said, the company's geographic reach is relatively limited, as it's primarily focused on Europe.

HIGHFLIER

SHIPPEO

Market strength

Commercial outcomes

NOTABLE CLIENTS

Carrefour

Fressnapf Group

Leroy Merlin

Intermarche

Coca-Cola HBC

Value proposition

Shippeo enabled Fressnapf Group to drive a 7% increase in the availability of goods at the point of sale and improve visibility of promotion stock levels.

Execution strength

Products and services

NOTABLE PARTNERS

Volvo

Verizon Connect

Trimble

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HIGHFLIER

What clients say

"Shippeo is a state of the art tool, helping us plan and anticipate daily operations in our distribution centers and stores, leveraging proactive and real-time ETA notifications. The teams at Shippeo carried out our carrier integrations quickly and on time, while their support teams were both helpful and responsive."

Ignace Craeye
*Former Director of E-Logistics, **Carrefour***

"We chose Shippeo because of the quality of their approach, their thorough understanding of our organization's unique needs and their ability to provide clear business benefits. The Shippeo platform's ability to push shipment status updates to stakeholders and customers is a game-changer, automating workflows that were largely manual before and allowing our teams to focus on core tasks, adding more value to our operations."

Matthias Wenzel
*Head of Supply Chain Management, **Fressnapf Group***

HIGHFLIER

Company/ product factsheet

Product description

Blume Global's visibility platform provides dynamic, predictive ETA for shipments across rail, road, air, ocean, and barge. The company's software solution supports a network across 120 countries.

Competitive positioning

Blume is an established player in the supply chain visibility space, with over 25 years of data collection that can inform its AI-based ETA algorithm. The company has a weaker global presence than the leaders in this space and has yet to expand into adjacent services such as yard management.

Partnerships

There are no notable disclosed partnerships.

Integrations

Google Cloud
Infosys
Oracle

CB Insights viewpoint

BLUME global™

Founded	HQ	Total raised	Estimated valuation	Last raised date	Last raised amount	Stage
1994	United States	Undisclosed	$500M	Sept 2021	Undisclosed	Undisclosed

Analyst spotlight

Blume has established itself as a notable player in the supply chain visibility space with over 25 years of data collection that can inform its AI-based ETA algorithm. However, the company trails competitors in market strength given that it has a more limited geographic presence than the leaders in this space. It has also yet to expand into adjacent services such as yard management.

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HIGHFLIER

BLUME global™

Market strength

Commercial outcomes

NOTABLE CLIENTS

Carrefour

Fressnapf Group

Leroy Merlin

Intermarche

Coca-Cola HBC

Execution strength

Products and services

Blume Global provides solutions such as asset life cycle management, transportation management, multimodal logistics planning and execution, and freight audit and payment.
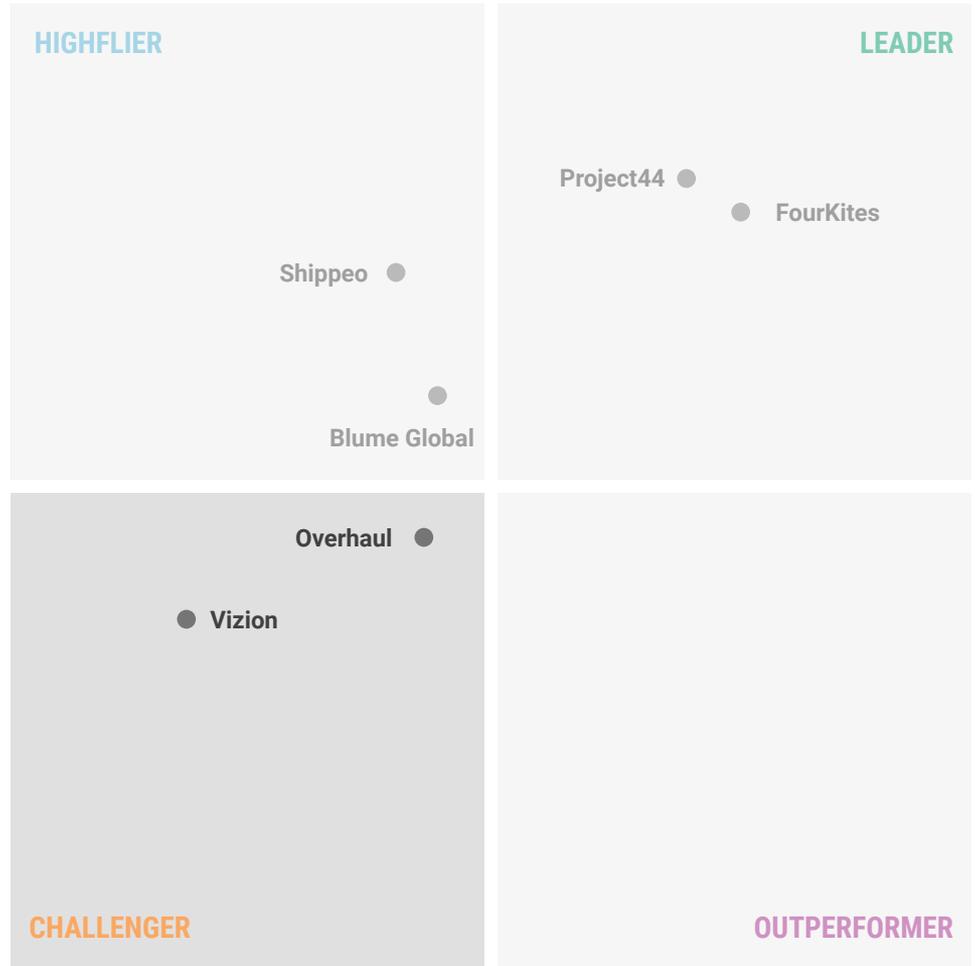
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CBINSIGHTS

OVERHAUL

Company/ product factsheet

Product description

Overhaul's real-time supply chain visibility platform enables shippers and 3PLs to feed disparate data sources into a situational analysis engine. It combines existing systems and third-party integrations to connect to data sources. Overhaul also provides a proactive risk management software and other critical insights, such as ETA prediction and exception management.

Competitive positioning

Overhaul's core differentiator is its automated risk management and intelligent response system. Its Sentinel software provides operators with real-time alerts and recommends automated steps for solving the problem.

Partnerships

Flight Aware
Marine Traffic
Microsoft
Oracle
Schneider
RiskPulse

Integrations

CaLAmp

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CHALLENGER

OVERHAUL | CB Insights viewpoint

Founded	HQ	Total raised	Estimated valuation	Last raised date	Last raised amount	Stage
2015	United States	$64M	$269M	Jun 2021	$35M	Series B

Analyst spotlight

Unlike other vendors, Overhaul's largest markets are pharmaceutical and healthcare. The company is beginning to make inroads with clients such as Bristol Myers Squibb. Overhaul is experiencing rapid growth, with client count increasing over 200% YoY and revenue over 100% YoY. Its recent $35M financing will be used to further accelerate client growth and establish new partnerships.

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VIZION

Company/ product factsheet

Product description

Vizion's ocean freight tracking API provides standardized container updates from 98% of all global shipments.

Competitive positioning

Vizion is a newer entrant to the supply chain visibility space with a notably smaller team and substantially less capital raised than its competitors. However, the company has leveraged public and private datasets to enrich existing datasets offered by its competitors.

Partnerships

Cosco Shipping
Maersk
UASC

Integrations

E2Open
Infor
Oracle
SAP

CHALLENGER

VIZION | **CB Insights viewpoint**

| Founded	HQ	Total raised	Estimated valuation	Last raised date	Last raised amount	Stage
2018	United States	$4.5M	$7.8M	Aug 2021	$3.3M	Seed

Analyst spotlight

Seed-stage firm Vizion is gaining traction for its ocean freight tracking APIs. The company is smaller and has raised less capital than competitors, in addition to offering more of a niche offering by focusing on ocean freight.

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CHALLENGER

Methodology

At a glance: ESP Vendor Assessment Matrix
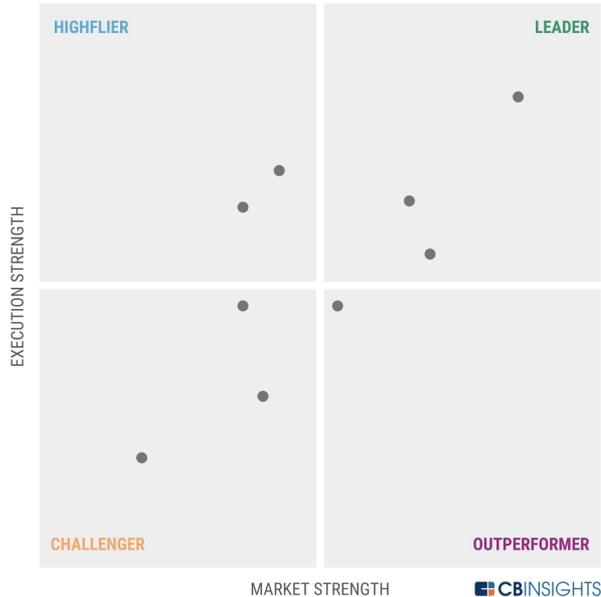
How do I use the ESP Matrix?

- Technology buyers can identify vendors, gain a view into top vendors, and identify the relative traction of companies within a specific tech market.

- Decision makers looking at partnerships, investments, and M&A — or scouting a tech market ahead of a build, buy, partner decision.

How does the ESP Matrix work?

- The spatial positioning through our proprietary methodology allows for an easily absorbed view into fragmented technology markets

- Each quadrant may be of interest depending on tech buyers' aims:
  - Leaders are established in the category with rounded offerings
  - Outperformers are high in momentum with promising capacity
  - Highfliers are robust in resources and rich in opportunity
  - Challengers may surprise on the upside and credibly threaten established market conventions

At a glance: ESP Vendor Assessment Matrix

How are vendors selected for the matrix?

- Analysts choose the tech providers which should be considered for decision makers' short lists. These selections are based on data and on analysts' industry knowledge.

- Preference is given to vendors for which we have complete data. Although it is not a requirement, vendors which respond to a survey may have an advantage over those that do not.

What data is used to position vendors on the ESP Matrix?

Y Axis — Execution Strength	X Axis — Market Strength
Products and services	Total addressable market
Financial status and health	Value proposition
Sales model and go-to-market strategy	Packaging and pricing
Company details	Brand and marketing
Management team and leadership	Commercial outcomes

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The methodology

The ESP matrix is the distillation of data and analyst insight into a clear picture of key private-company players in a technology market. The proprietary methodology integrates difficult-to-find inputs such as patent applications, business relationships, and private-company filings. It also incorporates Mosaic, our National Science Foundation-backed quantitative indicator of company health. The full array of signals — also including web, funding, and people data — determine a company's positioning relative to its peers. As the report is prepared, each company is evaluated against the same criteria in order to arrive at an easy-to-digest and consistent view into a market.

The ESP does not propose to be a complete picture of a tech market or a comprehensive view into its participants. The ESP focuses on private companies in each market under examination. It begins with a bottom-up view of the category by reviewing hundreds of company descriptions and

competitors through the CB Insights technology insights platform. Vendors are invited to respond to an online survey which collects additional data. The data on each of the companies is reviewed by our team of analysts who verify and augment the information collected and organized by our technology. Through distinct stages of analysis considered in the methodology, companies are selected for final inclusion in the matrix based on the overall quality as well as strength of signals pertaining to Market and Execution.

Some of the companies or vendors included in this report may be CB Insights clients. However, we never give preference to clients in the selection process. Companies cannot pay to be represented in the reports.

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