

The Order Management Market - 2025

An IHL Retail Executive Advisory Program Research Study

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HARD DATA, **SMART** DECISIONS

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Executive Summary,

The enterprise Order Management System (OMS) market in 2025 has entered a new era, marked by rapid innovation, broad digital transformation, and a surge in intelligent platform capabilities. Insights derived from a broad cross-section of industry participants reveal pronounced and convergent trends that are reshaping how organizations approach commerce, fulfillment, and supply chain optimization.

Key Market Trends

AI-Driven Operational Intelligence

The deployment of artificial intelligence (AI) has shifted from experimental to mainstream, now serving as a fundamental component for competitive differentiation. Companies are using AI for various tasks, such as optimizing fulfillment, analyzing predictive scenarios, modeling tariffs and costs, segmenting inventory, and supporting sustainability initiatives. Real-time automation and predictive insights are increasingly available, transforming day-to-day decision-making in order routing, exception management, and forecasting.

Modular, API-First Architectures

Most companies are now moving towards modular, microservice-based, and API-driven OMS platforms. This design philosophy enables seamless integration with a wide variety of legacy and third-party systems, encourages fast deployment and adaptation, and supports the creation of composable commerce ecosystems. Such architectures are foundational for supporting industry- and region-specific requirements and for pivoting quickly in response to new retail models or operational needs.

Business User Empowerment & Low/No-Code Configuration

Modern OMS platforms are designed to allow business users, not just IT professionals, to configure and optimize the system. This trend is evident in the increasing availability of low/no-code interface options, transparent AI/ML logic, and explainable decision-making workflows. These capabilities are essential for organizations seeking agility, as they allow rules and optimization strategies to be quickly adjusted in response to changing market conditions or business strategies.

Support for Complex Commerce Models

Modern OMS solutions now routinely offer robust support for a variety of commerce models, including B2B, B2C, and hybrid B2B2C environments. Flexibility in orchestration, vendor-managed inventory, marketplace enablement, and support for multi-party and white-label capabilities have become expected standards, reflecting the growing complexity of global fulfillment and distribution strategies.

Ethical and Transparent AI

Ensuring transparency, auditability, and ethical use of AI is now a key focus in OMS design. Organizations are implementing strict guidelines around explainable machine learning, ensuring that users can review, understand, and, when needed, modify both the logic and outputs of automated processes.

Order Management is becoming smarter, more flexible, and more transparent—empowering organizations to manage increasingly complex commerce models and equipping business users to directly shape operational outcomes with the support of real-time intelligence and intuitive, configurable systems.

IHL's Evaluation of the Retail OMS Software Market

Market Observations

In the past year, the enterprise OMS market has seen significant innovation and transformation, as documented by the responses of eighteen leading vendors: Aptos, Blue Yonder, Deck Commerce, Deposco, Fluent Commerce, Fujitsu, IBM, Infios, Jesta IS, KBRW, Kibo Commerce, OneStock, OneView Commerce, Oracle, Planet, Salesforce, SAP, and Teamwork Commerce. This breadth of participants provides an expansive, balanced perspective and ensures that every corner of the global OMS ecosystem, from North America to Europe and beyond, is reflected in both trend insights and operational best practices.

Across this diverse vendor landscape, the rapid advancement and real-world deployment of AI have shifted from vision to tangible competitive edge. Most vendors have invested in both agentic and Generative AI (GenAI), with IBM and SAP using AI for sustainability optimization and predictive order scenario analysis, while Infios and KBRW have tackled tariff uncertainty through dynamic, AI-augmented fulfillment and cost modeling. Deck Commerce, Fluent Commerce, and OneStock highlighted production-ready automation in order routing, exception management, and forecasting, demonstrating the shared priority on embedding intelligence in both standard and highly specialized retail environments. Kibo Commerce offers three generally available agents including Customer Success Agent, Merchandiser Agent, and their CSR Agent.

A defining feature among these vendors is a commitment to modular, API-first architectures. IBM, Oracle, Salesforce, and SAP have extended their platforms to offer composable, microservice-based options, supporting seamless integrations with legacy and third-party solutions. This mirrors similar efforts by Blue Yonder, Kibo Commerce, and Teamwork Commerce, whose flexible architectures support quick pivots whether that is for rapid deployment of new omnichannel experiences or support for specialized industry needs, such as Jesta IS's and Fujitsu's deep retail and global localization capabilities.

Omnichannel support has become a standard feature. From Kibo Commerce's context-sensitive order offering and Deck Commerce's agile order orchestration for B2C and D2C brands, to Deposco's and Planet's real-time inventory pooling and click-and-collect enablement, all vendors demonstrated strong out-of-the-box support for journeys such as BOPIS, ship-from-store, returns-anywhere, and multi-node fulfillment. Fujitsu and OneStock have expanded these capabilities with innovative return and upcycling flows, ensuring that both customer experience and sustainability targets are addressed in the modern retail journey.

Personalization stands out as a point of differentiation. SAP leverages upstream data and loyalty insights for targeted fulfillment, Kibo Commerce employs segmented inventory and dynamic promotions, while Fluent Commerce and Salesforce connect directly to external or their own CRM and loyalty engines to configure personalized offers and customer-driven SLAs. OneView Commerce, Aptos and Oracle, meanwhile, enable retailers and brands to orchestrate complex, loyalty-driven engagement and service experiences across all front-end channels.

Most roadmaps now include low-code and no-code capabilities. Aptos, SAP, Infios, and Salesforce all provide robust no-code workflow and rule engines for business user autonomy, with Fluent Commerce, Planet, and OneView Commerce investing heavily in visual configuration and integrated API management to streamline process adaptation at the edge. Deposco, Deck Commerce, and Jesta IS emphasize drag-and-drop customization for reporting and order process modifications, underlining the need for operational agility as labor conditions and market expectations shift.

Vendors have shown a strong focus on sustainability and supply chain resilience. IBM's Sterling OMS quantifies and helps minimize the carbon impact of fulfillment; Fujitsu and SAP prioritize local sourcing and consolidated shipments; Teamwork Commerce, Deck Commerce, and KBRW address waste through enhanced shipment optimization and returns management. Meanwhile, Infios, KBRW, and Oracle are at the forefront of addressing tariff volatility through dynamic, rule-based optimization—ensuring clients remain competitive and compliant in a challenging regulatory environment.

Reporting and analytics are now standard features—Blue Yonder's Analyst Workbench, Kibo Commerce's extensive dashboard library, Teamwork's Looker-based reports, Salesforce's embedded analytics, and out-of-the-box dashboards from Oracle, OneStock, Deposco, and others—providing real-time, actionable insight into profitability, cross-channel performance, and margin optimization. Vendors such as Infios, IBM, Planet and Kibo Commerce now enable both embedded and external BI integration, reflecting the industry's commitment to business user self-service and data-driven decision-making.

B2B, B2C, and B2B2C support are robust among most vendors. IBM and SAP lead with deep inventory segmentation and contract-aware allocation, while Infios, Kibo Commerce, Oracle, Jesta IS, and Deposco allow for flexible orchestration, vendor-managed inventory, and marketplace enablement. Several vendors have accelerated development of white-label and multi-party capabilities, allowing retailers, brands, and partners to manage increasingly complex fulfillment and distribution models.

Returns management and post-purchase workflows have seen broad enhancements as well. Kibo Commerce, IBM, OneStock, and Fluent Commerce all support intelligent returns routing, circular returns pathways, and enhanced fraud prevention. These capabilities are supplemented by Jesta IS, Deck Commerce, and Planet, who emphasize self-service returns, omnichannel flexibility, and streamlined refund management as value drivers for both retailers and consumers.

Almost all vendors reported aggressive 12- to 36-month innovation roadmaps. Across the group, agentic AI for end-to-end lifecycle management, composable and event-driven architectures for extensibility, AI-enabled onboarding automation, and a convergence of supply chain planning with OMS feature strongly. OneView Commerce, for instance, is enabling more adaptive, event-driven orchestration, while Oracle, IBM, and Salesforce highlight a move toward cognitive, continuously learning and optimizing order management ecosystems.

2025 OMS Developmental Focus Areas

- Agentic AI orchestration: Autonomous, explainable AI agents directly in fulfillment, exception handling, and real-time decision support.
- Composable, modular architectures: API-first, microservice solutions for rapid extensibility and future-tech compatibility.
- Unified, persona-driven experiences: Streamlined, role-based dashboards and workflows, tailored for each user group within operations, supply chain, and customer care.
- Low-code/no-code empowerment: Visual configuration of orchestrations, reporting, integrations, and business rules.
- Sustainability and circular commerce: Built-in tools for optimizing environmental, regulatory, and social governance (ESG) KPIs.
- Real-time data & analytics: Embedded dashboards for operational visibility, profitability, exception management, and scenario modeling.
- Dynamic tariff and compliance handling: Automated, rule-based optimization for regulatory and tariff shifts at order, shipment, and network levels.

- Advanced returns and post-purchase experience: Automated returns routing, fraud avoidance, and circularity support.
- End-to-end personalization: Delivering loyalty- and profile-driven experiences throughout the order lifecycle, across all channels.
- Supply chain convergence: Integration of planning, execution, and analytics layers—unified digital twins, predictive replenishment, and network resilience capabilities.

Finally, responsibility and compliance stand at the center of every modern platform. IBM, SAP, Teamwork Commerce, Infios, and Salesforce provide codified governance frameworks for AI ethics, data privacy, and transparency, reflecting the elevated regulatory requirements and trust demands across modern and developed retail markets.

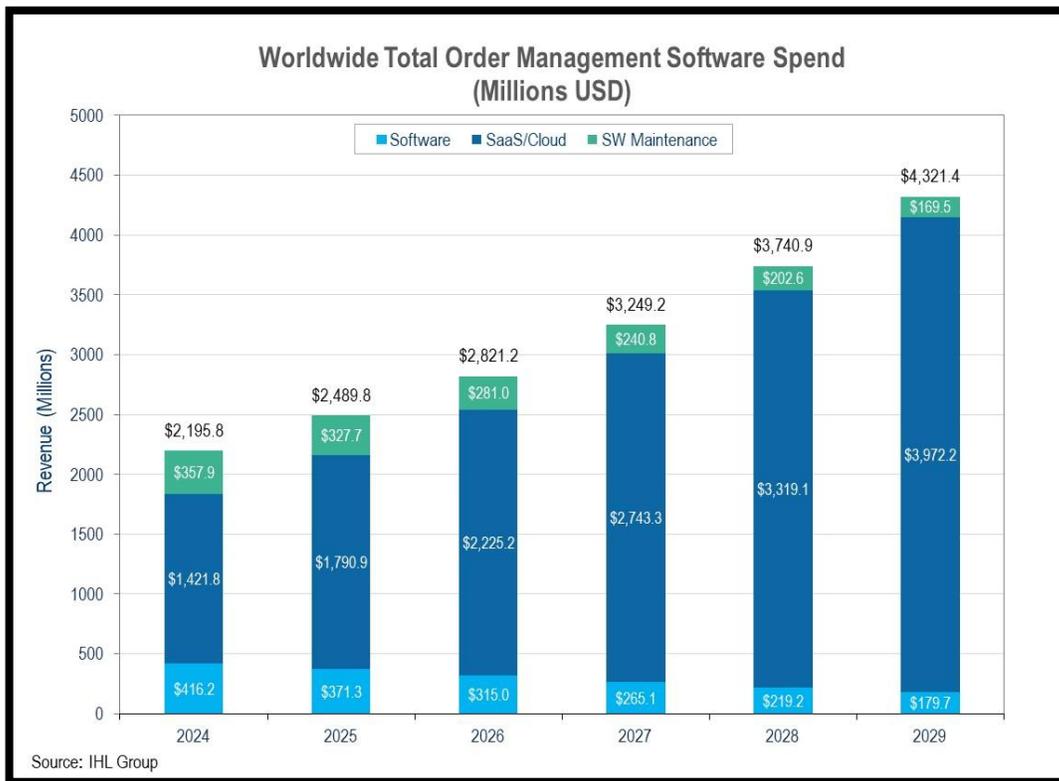
In summary, the combined findings illustrate a market raising the bar for intelligence, automation, flexibility, and transparent operations. The scope and diversity of these contributions ensure a holistic, representative account of the current OMS landscape and set the stage for how retailers, brands, and B2B operators will continue meeting rapidly evolving customer and stakeholder expectations worldwide.

Retailer Key OMS Selection Questions

For those using this document to make potential OMS selections, we recommend the following questions be considered during the initial states of vendor vetting and evaluation:

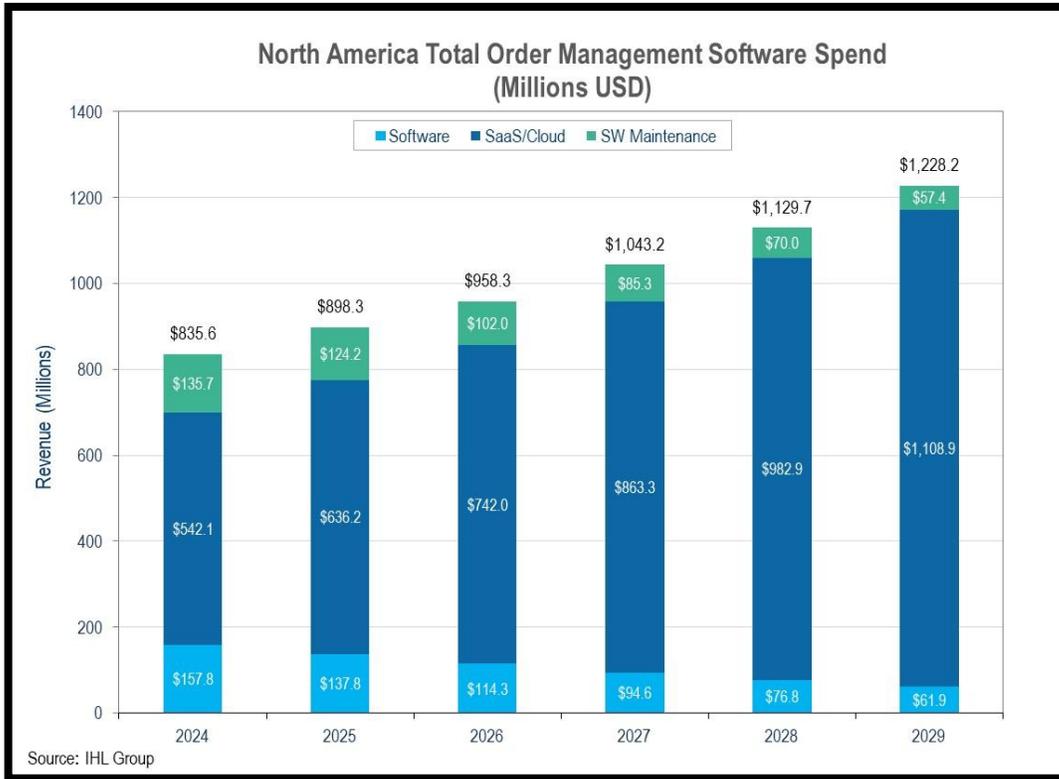
1. How advanced, configurable, and explainable is your shipping optimization engine? Does it support real-time, multi-factor decisioning including tariffs, sustainability, service levels, and can it be configured by business users (low/no-code) for rapid adaption?
2. What is the maturity and transparency of your AI/ML roadmap? What AI/ML features are live and proven versus planned? Can the AI response explain its recommendations, allow for human-in-the-loop controls, and does it enable scenario simulation for future planning?
3. How adaptable is your OMS to business change? Can workflows, integrations, and fulfillment logic be updated by business teams without extensive IT/developer involvement? How is composability achieved?
4. What depth and breadth of omnichannel journeys do you support out of the box? Can the OMS deliver personalization (offers, loyalty), real-time, cross-channel visibility, and seamless support for emerging fulfillment and return models?
5. Does the OMS scale with demand—both technically and operationally? How has it performed at peak volumes, and what is the upgrade/maintenance frequency and complexity?
6. How does your roadmap future-proof my investment? What planned innovations—including agentic AI, sustainability, circular commerce, and real-time regulatory/tariff support—are committed for 12-36 months?
7. Which integrations are off-the-shelf, and how rapidly can new integrations or workflows be deployed? What APIs, connectors, and iPaaS options do you provide, and what is the ongoing cost and complexity?
8. How are sustainability, governance, and AI ethics embedded in your platform and roadmap? What tools exist for measuring and optimizing ESG performance, and what policies ensure AI transparency and compliance?
9. How does your OMS minimize the impact of tariff uncertainty in both fulfillment and returns operations? Is the platform equipped for real-time adaptation to new trade/tariff policies?
10. What innovations and enhancements can you demonstrate from the past year that directly drove measurable ROI for clients? Can you provide client examples or before/after metrics?

Total Retail OMS SW Spend Worldwide

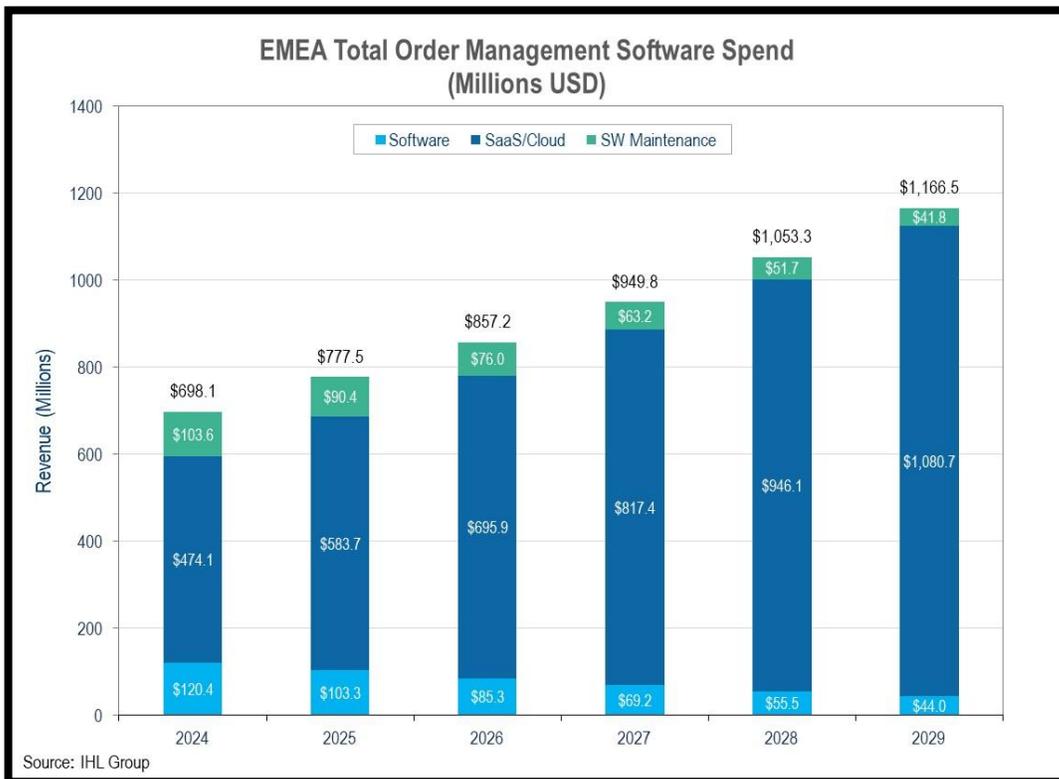


Worldwide total order management software (OMS) spend is projected to grow significantly over the next five years, rising from \$2.2 billion in 2024 to \$4.3 billion by 2029. The largest increase comes from the SaaS/Cloud segment, which grows sharply from \$1.4 billion in 2024 to \$4.0 billion in 2029, demonstrating the dominance and acceleration of cloud-based solutions. In contrast, on-premise software spend is forecast to decline steadily, dropping from \$416 million in 2024 to just \$180 million in 2029, while software maintenance for on-premise systems also decreases from \$358 million to \$170 million over the same period. This data highlights an unmistakable shift toward cloud deployments in global OMS investments, with traditional on-premise solutions rapidly losing share and ongoing maintenance contracts similarly shrinking. The projected trajectory underscores a global market heavily favoring cloud transformation, making SaaS/Cloud the defining force in OMS software spend growth.

North America



EMEA



Trends, Drivers and Barriers

The change in the software landscape over the past handful of years has been nothing short of dramatic. New players, consolidation, Mobile applications and Cloud solutions are all a part of the sea change.

Key Trends and Drivers

Retail Update

North America – Retail sales grew +1.9% for 2024 over 2023 (Data from Census.gov and statcan.ca) and are up 3.6% through the first half of 2025. E-Commerce sales increased +8.7% from 2023 and now comprise approximately 18% of total retail sales. Economic uncertainty, supply chain issues, theft, inflation and continued labor issues will prove to be drags on the entire industry. FDCM retailers (Food, Drug, C-Stores & Mass Merchants) are up +2.2% through the first half of 2025.

EMEA – Retail sales increased by 0.5% for 2024 (vs -1.3% the previous year) for the key EMEA countries in terms of the Euro (sales were up 3.4% vs the US dollar). The key Euro countries increased a collective 0.5%, compared to 2023's 0.7% increase. Their non-Euro counterparts excepting Russia (UK, DK, NO, SE, CH) increased by an average of 2.6% in terms of local currency but decreased by 0.1% against the Euro. Retail sales are expected to grow +1.7% for 2025.

APAC – Retail sales increased by 1.7% for 2024 for the key APAC countries in terms of the US dollar. This is in comparison to +3.4% experienced by EMEA and +1.9% in North America. By local currencies, three key APAC countries declined (Hong Kong, New Zealand and South Korea), while Vietnam (+9.0%) and India (+4.8%) led growth. Expectations for 2025 are for retail sales to increase approximately 4.0%.

LATAM – Retail sales increased an average of +3.0% (increased by 1.1% in terms of the US dollar) for the key LATAM countries (MX, BR, CO, CL, AR, PE, VE) in 2024. E-Commerce sales in the region advanced another 11.4% from 2023, confirming that they are among the fastest growing e-commerce markets on the planet.

Stores are King, But Digital Grows

Throughout the world, traditional brick-and-mortar stores continue to dominate, but online retail continues to make headway. The pandemic acted as a catalyst for this shift, significantly accelerating the adoption of e-commerce across the region, as consumers were forced to turn to online shopping out of necessity.

LATAM and APAC are the world's fastest-growing e-commerce markets, projected to grow at a rate of 21.0% and 10.0%, respectively in 2025. Both compare favorably to North America (8.5%) and EMEA (8.0%).

Supply chain disruptions highlighted vulnerabilities and prompted retailers to reevaluate their logistics strategies. This led to a focus on supply chain resilience. The integration of AI and analytics helps retailers optimize inventory management and enhance customer experiences.

Bottom line, retail is navigating a complex landscape where traditional retail and e-commerce coexist and complement each other.

Inventory Visibility is Table Stakes

Inventory visibility is no longer a "nice-to-have" but a fundamental requirement for retailers aiming to thrive in-store. Forget endless searches and frustrated associates; today's consumers expect immediate access to product availability information within the brick-and-mortar environment. If a customer walks in looking for a specific item, they expect staff to quickly locate it, not offer vague assurances or direct them to another store. Retailers who can't provide this level of transparency risk losing sales and damaging their reputation.

Solutions like mobile POS systems, digital signage displaying real-time stock levels, and readily available staff armed with inventory data are crucial. These tools empower associates to provide accurate information and personalized service, enhancing the overall shopping experience. By investing in technologies that improve in-store inventory visibility, retailers can reduce stockouts, minimize customer frustration, and foster loyalty. In a competitive market where customer experience reigns supreme, failing to prioritize in-store inventory visibility is a gamble retailers can no longer afford to take.

Cloud-Based Scalability

Cloud-based scalability in Order Management Systems (OMS) empowers retailers and brands to seamlessly adjust order processing resources in line with business fluctuations. As demand grows—during peak seasons or while expanding into new markets—cloud OMS platforms automatically scale computing power, storage, and concurrent user capacity without requiring investment in costly on-premise infrastructure. This flexibility ensures reliable performance and real-time data access across multiple locations, channels, and devices. Furthermore, the pay-as-you-go subscription model keeps costs aligned with actual usage, and instant scalability allows rapid adaptation to changing order volumes. Ultimately, cloud-based scalability drives agility, efficiency, and future-ready growth for modern commerce.

Best Practices

- **Multi-Channel Integration:** Retailers can seamlessly integrate OMS with multiple customer journeys to provide customers with consistent shopping experience and enable efficient order processing.
- **AI/ML Integration:** Vendors continue to incorporate AI/ML into their solutions. That said, the ability to articulate and quantify end user ROI remains ambiguous at best.
- **Optimized Returns Management:** Retailers can establish efficient processes within the OMS for handling returns, exchanges, and refunds, aiming to improve customer satisfaction and recover inventory.
- **Real-Time Inventory Management:** Retailers have made significant investments to maintain increased inventory visibility throughout the supply chain. This helps prevent overstocks and out-of-stocks.
- **Order Routing Logic:** Retailers can configure OMS to intelligently route orders to the most suitable fulfillment location based on proximity, inventory levels, costs, etc.
- **Change Agent:** OMS, along with E-Commerce, has played a pivotal role in the digital transformation of retail and hospitality. OMS has been a lifeline for some retailers, especially in the Specialty space. Those vendors with OMS, along with a full suite of solutions, will thus take an elevated position within the ISV 'pecking order' of their prospective clients due to Board level visibility that OMS now garners.

Automation and AI Integration

OMS solutions are becoming more automated. AI/ML now supports demand forecasting, inventory optimization, and real-time order routing. Intelligent assistants and agentic AI features reduce manual intervention and speed up workflows

Customer Journeys: Optimization

COVID changed all of life. New customer journeys (BOPIS, BORIS, Curbside, Click & Collect and Local Delivery, among others) proliferated as retailers scrambled to meet new customer expectations.

Some retailers deployed these journeys as part of their quick pivot during the pandemic. In some cases, retailers had no time to optimize these journeys; they needed to get something, anything, deployed as soon as possible, even if it was not specifically part of the CIO's roadmap. Solutions based on Microservices seemed to perform best and offered the most to clients.

Data collected shows margin losses from 4.2 to 10 points or more when the customer journey is not optimized. Early efforts to optimize showed that more than half of that can be recovered. This is not sustainable going forward for retailers, especially those in the FDCM segments. Considerable energy has already been expended to optimize these journeys, and we expect that going forward OMS will continue to play a big part.

Notable Mergers & Spin-offs

- Infor acquired OMS assets from Arvato (2/18)
- Adobe acquired Magento (5/18)
- Goldman Sachs acquired Aptos (3/20)
- Infor divested from the OMS market (2020)
- Blue Yonder acquired Yantriks (7/20)
- Aptos acquired Revionics (8/20)
- Aptos acquired LS Retail (1/21)
- Adobe divested from the OMS market (8/21)
- Panasonic acquired Blue Yonder (9/21)
- Advent International and Eurazeo made a joint strategic investment in Planet (12/21)
- Amazon acquired Veeqo (3/22)
- Körber acquired enVista's OMS (9/22)
- FactSet acquired LiquidityBook (2/25)
- Aptean acquired Logility (4/25)

Barriers

Data, Data, Data

OMS relies on clean, accurate and consistent data to function effectively. Poor data quality can lead to errors in order processing, inventory allocation, and fulfillment decisions. Regardless of whether data quality is hindered by legacy systems, manual data entry, inconsistent data formats or a lack of standardized procedures, retailers must do everything they can to minimize and eliminate these causes. Only then can the retailer anticipate a sound return for their investment in OMS.

Economic Uncertainty and Investment Prioritization

Economic uncertainty is a major barrier to OMS adoption as retailers face volatile growth, high inflation, and shifting investment priorities worldwide. In North America, a slowdown in growth and persistent inflation have led to cautious IT spending, with companies prioritizing operational essentials over new OMS deployments. EMEA faces weakened trade, cautious consumer demand, and policy uncertainty, causing many firms to delay large-scale digital projects. APAC, though still growing rapidly, is seeing selective investments as inflationary pressures and geopolitical risks temper business confidence. LATAM's macroeconomic outlook remains mixed, with strong FDI flows but fragile local economies facing high inflation and political instabilities. Across regions, inflation raises software and implementation costs, making retailers scrutinize OMS investments and often favoring incremental upgrades over transformative, enterprise-wide solutions.

Skills Gaps and Change Management

Skills gaps and change management are pivotal barriers to OMS adoption in the retail sector. Many organizations lack personnel with the technical expertise to configure, integrate, and optimize modern order management systems, especially where cloud, data analytics, and API-driven workflows are involved. Legacy staff, accustomed to manual processes or older systems, may struggle with new digital platforms, creating resistance to change. Effective OMS implementation requires not just IT knowledge but also cross-functional

training and business process alignment, which many retailers underestimate. Moreover, successful change management demands strong leadership, ongoing communication, and incremental training to secure buy-in across departments. Without addressing technical skills shortages and fostering a culture of adaptation, retailers risk costly implementation delays, under-utilization of OMS functionalities, and missed opportunities for operational improvement.

Effects of Inventory Distortion

Inventory Distortion (out-of-stocks + overstocks) represents serious inefficiency within retail. Not only do the overstocks tie up capital unnecessarily (and result in discounting), but the out-of-stocks represent sales that are lost to the competition. Both impact the bottom line, as well as customer perception and ability to respond to challenges.

Legacy Systems

Legacy systems bring with them considerable problems when attempting an integration with modern OMS platforms. Legacy systems tend to be more “siloed” in nature, making any integration tough, if not impossible. Support might be non-existent (the provider might no longer be in business), security could be a joke (the technology might be the decades behind “current”), and inefficiency would be the watchword.

AI Overview

The retail and hospitality industries are witnessing a technological revolution, driven by the rapid advancements in AI and its various subfields. Among these, GenAI stands out as a powerful tool that holds great potential to transform how retailers operate, but in the near term the greatest change comes from the hard work retailers have done in traditional AI and Machine Learning (AI/ML). By generating data, content, and even human-like interactions, GenAI can streamline processes, enhance personalization, and foster innovative customer experiences. When these are combined, GenAI on top of the clean, tagged, and optimized data lakes built for traditional AI/ML, exponential growth can happen.

The integration of AI into retail enterprise operations is not a plug-and-play experience, and there are certain prerequisites that must be met to reap the full benefits. Included among those prerequisites are the following:

- **Single Version of the Truth:** This is table stakes, because if the data stinks, so will any operations that rely on it. The success of an AI model depends on the accuracy, volume and relevance of data upon which it is trained. Hence, a well-organized data repository (that houses diverse and high-quality datasets) is needed. That data must be clean, accurate, abundant and tagged to be most effective (although GenAI can work with general data, it is when combined with the core corporate data where the exponential magic happens).
- **Inventory and Customer Visibility:** Retailers also need to have visibility of inventory and customer data throughout the enterprise (stores, warehouses, DC's, supply chain back to vendors, and returns as well) in order to maximize not only customer service, but margins as well. As for customer data, capturing and leveraging that data across channels is critical to offers and increasing sales through personalization. This is obviously a critical area within the context of OMS.
- **Computational Resources and Expertise:** The implementation of GenAI demands significant computational power and technical expertise. Retailers must assess their current infrastructure and, if necessary, augment them to handle the complexity of AI training and inference tasks.
- **Scalability and Flexibility:** As retailers operate in a dynamic environment, their AI systems must be scalable and adaptable to changing market demands. An agile approach to AI integration is crucial to respond swiftly to new challenges and opportunities.

The summaries which follow present a comprehensive overview of the evolving landscape of AI, ML, and agentic capabilities within the order management system (OMS) market as of 2025, synthesizing common themes, strengths, and future directions across the sector. It highlights a field in transition, where operational intelligence is becoming central to OMS strategy, yet approaches and maturity levels vary significantly among providers.

Current Landscape

Across the market, current AI features most frequently include analytics-driven insights, predictive order routing and fulfillment, anomaly detection, and issue prevention. Some platforms deploy machine learning for real-time inventory optimization, dynamic delivery promises, personalized fulfillment, or self-service customer support. In a portion of solutions, AI capabilities are integrated natively and drive autonomous or semi-autonomous orchestration, while others rely on open or modular architectures to enable integration with best-of-breed external AI or decision engines. Features like agentic customer service actions, intelligent returns, and AI-enhanced reporting are in increasing use, but many platforms still focus AI efforts primarily on business intelligence and actionable analytics, rather than on fully automated workflows.

Roadmap and Innovation Focus

Most OMS providers are actively developing next-generation agentic and GenAI capabilities. Roadmaps include ambitions such as natural language workflow configuration, explainable and ethical AI for process transparency, multi-agent orchestration across the order lifecycle, and greater user empowerment through low-code, no-code, or persona-driven UI enhancements. GenAI is a major area of investment, with plans to

support conversational analytics, automated customer engagement, dynamic workflow generation, and advanced scenario simulation. The market demonstrates a pronounced emphasis on open integration—enabling users to bring their own AI models or seamlessly orchestrate OMS functions through third-party agents.

Strategic Differentiation Areas

Key areas of differentiation across the industry include the extent of agentic and autonomous fulfillment capabilities, depth of embedded AI in end-to-end workflows, focus on data privacy and ethical AI governance, and flexibility in supporting modular architecture and integration. Increasingly, OMS solutions are moving away from "black box" automation toward explainable, human-in-the-loop, and transparent approaches, while aiming to empower both technical and non-technical users with greater control over intelligent process optimization.

General Trends

The overall direction is toward OMS platforms that blend advanced AI/ML with practical business usability, balancing automation with operational oversight. As the sector matures, capabilities such as proactive issue detection, agentic customer support, real-time predictive analytics, and composable, API-driven extensions are rapidly becoming baseline expectations for modern order management solutions.

AI Vendor Capabilities

Aptos

Current AI/ML/Agentic Capability

- Aptos states that AI/ML-based functionalities for intelligent order routing, fulfillment, order issues prediction/prevention, contact center AI, and AI-driven returns are all on the product roadmap but are not yet available in the live product.
- The most tangible AI-driven capability is Aptos's embedded Insights Module (Advanced Embedded Insights), powered by Strategy One (formerly MicroStrategy). This provides:
 - AI-powered “Auto Answers” through chatbot-style queries within dashboards and embedded apps.
 - Automatic dashboard creation (auto dashboarding).
 - Enhanced contextual intelligence via browser extensions (HyperIntelligence), surfacing relevant data in real time.
 - These features allow users to receive AI-generated insights and visualizations based on OMS data.
- The Integration Service Layer (ISL), using AWS EventBridge and Snowflake, allows event publication/consumption—enabling low-code/no-code integrations and the use of data streams for further analytics or AI integration, but not agentic automation natively yet.

Future AI/ML/Agentic Capability

- AI-powered routing is explicitly on the Aptos roadmap, with goals to create dynamic fulfillment strategies based on real-time inventory, location, shipping costs, and delivery speed.
- AI to proactively detect anomalies, such as duplicate orders or missing data, and trigger corrective workflows automatically.
- Using AI to prioritize orders based on customer value, urgency, or SLAs.
- Expanding generative and predictive AI for reporting, leveraging both embedded Strategy One features and possibly AWS and Snowflake.
- There are plans to incorporate agentic AI capabilities into the Advanced Embedded Insights module with a future upgrade (Strategy’s Auto 2.0), which will bring agent-type automation to analytics and decision support within the OMS UI.
- GenAI :
 - Aptos is evaluating using major platforms like AWS, Strategy/MicroStrategy, and Snowflake for GenAI enablement, rather than building proprietary engines.
 - Explainable AI for order routing is in active experimentation (first deliverable aimed at order routing explainability).
- Ongoing evaluation of 3rd-party platforms for large language models (LLMs).

Overall AI and Agentic Product Strategy, Points of Differentiation

- Aptos's current strengths lie in AI-driven analytics, not in in-line orchestration automation. Their closest “AI” features are embedded business intelligence capabilities—providing users with advanced, self-service insights rather than automating fulfillment, exception handling, or customer service.
- Aptos is clear that production-level agentic/ML/AI orchestration is a future deliverable. Its core differentiation is its modular and open strategy, leveraging a best-of-breed analytics ecosystem, headless/event-driven architecture, and flexible APIs, setting the stage for eventual agentic capability without committing to a proprietary AI engine.
- Aptos intends to integrate capabilities from AWS, Strategy/MicroStrategy, and Snowflake, so customers can benefit from market-leading innovation in AI without platform lock-in.

- The platform supports event-based architecture and low-code/no-code customization, which will eventually facilitate rapid rollout of AI/agent capabilities as they become available, but these are not yet true agentic workflows in today's offering.

Blue Yonder

Current AI/ML/Agentic Capability

- Blue Yonder's Order Management System features real-time, AI-driven fulfillment optimization, including dynamic inventory visibility, sourcing rules, and predictive exclusion logic to deliver precise delivery promises and prevent overselling. AI and ML are embedded within their 'Commits' service, which continuously optimizes sourcing and fulfillment based on speed, cost, margin, and capacity.
- ML models estimate inventory inconsistency and proactively adjust safety stock levels to minimize out-of-stocks and optimize inventory exposure. Stockout prediction algorithms ensure higher accuracy in inventory promises.
- Deep learning models predict delivery times with high accuracy and provide markdown predictions to enhance fulfillment decisions and protect margins.
- Customer Order Visibility (COV) leverages unsupervised learning to detect order pattern anomalies and provide actionable insights for fulfillment improvements.
- AI-powered microservices enable self-service portals that support order tracking, modification, returns, and chat-based interactions, all dynamically managed by underlying ML systems.
- An integrated AI/ML-powered system from Doddle calculates optimal return paths by predicting demand, selling price, and processing costs for each return, with agentic explainability features emerging.
- The sourcing simulator lets users test "what if" scenarios for different rule and inventory configurations, providing data-driven guidance for optimal business KPIs such as cost and delivery time.
- Fulfillment and sourcing engines are ML-driven, tailoring offers of split shipments, prioritized nodes, or channel-based fulfillment based on customer and order context.

Future AI/ML/Agentic Capability

- Major roadmap items include Customer Service Agents and Fulfillment & Sourcing Agents that will provide a unified, agentic UI, offering proactive resolutions, smart queues, intent recognition, guided modifications, and real-time recommendations across the OMS suite. Also in development are Reverse Fulfillment Agents (for returns optimization) and Observability Agents (for explainable AI on order behavior).
- GenAI will interpret customer intent, suggest responses, prioritize and escalate tasks, streamline interactions (e.g., summarize tickets, bulk resolve exceptions), generate strategic sourcing plans, and optimize inventory.
- Plans for fully autonomous agentic workflows, adapting sourcing, order capture, and post-order management strategies in real-time, are slated after 2026.
- New role-specific UIs powered by agentic AI will enable tailored workflows, insights, and automation for distinct personas (fulfillment ops, analysts, managers).
- Enhancements to enable dynamic rebalancing using real-time inventory segmentation, rule-based sourcing, and automated policy adjustment to mitigate market shocks.
- The roadmap includes advanced analytics to measure and optimize for carbon emissions, packaging waste, and cost-to-serve across fulfillment nodes, as well as further agentic tools to anticipate supply chain disruptions.

- 2026 objectives include network-native capabilities spanning supplier, logistics, and fulfillment partners, and embedding self-learning optimization engines directly into the Blue Yonder platform.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Blue Yonder is transitioning from microservices-first to agentic, unified platform experiences. Their investments in AI/ML aim to unify decisioning, break silos, and enable the OMS to act as an intelligent system rather than a static record-keeper.
- A standout differentiator is interoperability across planning, warehousing, distribution, transportation, labor, and returns. AI/ML is embedded not just for fulfillment optimization but also as a foundation for end-to-end supply chain collaboration.
- Real-time AI enables delivery promises, sourcing, and fulfillment to be tailored at the customer/order level—prioritizing delivery windows, handling split shipments, and pushing context-aware alerts; this flexibility is not commonly matched.
- Their aggressive multi-year roadmap to launch persona-based, generative, agentic interfaces positions Blue Yonder's OMS as a “co-pilot,” helping ops teams proactively surface insights, automate workflows, and learn/adapt with operational data.
- Clear focus on compliance, transparency, and explainability with AI agents (e.g., reverse fulfillment and observability agents) to assure trust in automated and autonomous systems.
- AI/ML simulation lets users quantify potential business outcomes before committing new sourcing or allocation rules, and self-learning optimization ensures ongoing improvement of business results.
- Blue Yonder's innovation extends deeply into multi-enterprise, B2B, and logistics markets, embedding AI in forecasting, allocation algorithms, inventory balancing, and high-volume network orchestration.

Deck Commerce

Current AI/ML/Agentic Capability

- Deck Commerce currently does not have any AI/ML or agentic capabilities in production with clients.

Future AI/ML/Agentic Capability

- Launching soon, with item-level, dynamic delivery date estimates using fulfillment/shipping variables and live/cached data.
- Expanded support anticipated this year, enabling autonomous agent-driven shopping and fulfillment workflows.
- AI will power more intelligent routing, proactive issue detection, and scenario modeling for fulfillment optimization.
- Planned enhancements include AI capabilities to help contact center agents automate issue resolution, suggest actions, and summarize service tickets.
- Deck plans to use third-party GenAI to enhance agentic workflows and customer interactions (e.g., automating notifications, suggested content), with a strong focus on transparency and customer data privacy.
- The 5-year vision includes a fully agent-compatible OMS, autonomously managing post-purchase routing, recovery, and service actions at global scale.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Deck is taking an incremental, customer-driven approach—developing AI/ML enhancements with a focus on transparency, human-in-the-loop control, auditability, and clear labeling of AI-generated content.
- Deck’s modular, API-first architecture is designed for easy integration of future AI/ML and agentic capabilities, including opt-in use of third-party AI and composability within unified commerce ecosystems.
- Deck is actively evolving toward agent-driven commerce experiences—for both pre- and post-purchase journeys—by exposing OMS data and orchestration services for agentic shopping, fulfillment, and automated customer service, while keeping operational control with the retailer.
- While AI is not yet live, Deck’s architecture already allows brands to personalize fulfillment via configurable orchestration logic, extensible order objects, and customizable workflows, setting the stage for more adaptive and intelligent automation as AI matures.

Deposco

Current AI/ML/Agentic Capability

- Deposco’s Order Management System does not presently include built-in AI/ML or agentic functions for order routing, fulfillment optimization, anomaly detection, customer service, or returns in its OMS offering.

Future AI/ML/Agentic Capability

- An AI-driven delivery promise feature is being developed and planned for late 2025, leveraging shipment data from across Deposco’s client base to predict delivery times with high accuracy even before orders are placed. This feature is aimed at improving cart conversion rates by showing reliable delivery estimates, initially targeting Shopify users with a dedicated app.
- Deposco is integrating a GenAI chatbot into its reporting system, enabling natural language-driven data inquiry and analysis.
- The broader Supply Chain Intelligence solution (beyond OMS) uses AI for benchmarking, causal analysis, and recommends action via GenAI for supply chain mitigation.
- Supply Chain Intelligence benchmarks identify required outcomes, Causal AI pinpoints root causes, and GenAI drafts recommended actions.
- The ultimate goal is to allow agents to directly execute corrective actions within the OMS, supported by comprehensive APIs and integration documentation—paving the way for future agentic supply chain orchestration.

Overall AI and Agentic Product Strategy, Points of Differentiation

- The broader Deposco Bright Suite platform leverages AI in supply chain analytics, benchmarking, and recommendation, delivering actionable business intelligence and process improvement recommendations, rather than in-OMS automation of workflows.
- Deposco’s strategy is to first build the intelligence layer (benchmarking, causal analysis, recommendations) and only then enable actionable agentic automation within the OMS, emphasizing robust API access and integration extensibility as preparatory groundwork.
- By providing comprehensive APIs and documentation, Deposco is positioning its OMS to be compatible with future autonomous agents, allowing integration with upstream analytics and agentic platforms as those technologies mature.

Fluent Commerce

Current AI/ML/Agentic Capability

- No embedded real-time AI/ML order routing or fulfillment: Fluent Commerce does not use AI/ML (including GenAI or agent-based optimization) to make real-time order routing, fulfillment, or anomaly decisions within the OMS today. They explicitly cite the performance impact and lack of full data context as reasons for not embedding such models in orchestration.
- Fluent OMS can incorporate external AI-driven demand forecasts and AI-based carrier performance data (from third-party solutions) into its sourcing logic, enabling smarter fulfillment despite not running those models natively.
- Fluent's Model Context Protocol (MCP) server enables external AI agents to interact with OMS: one such agent for order status ("Where Is My Order"/WISMO) is live in customer production as of July 2025.
- The platform is "AI agent agnostic," exposing APIs and real-time data so customer-chosen agent solutions (ex. for customer service, returns, or inventory) can connect, but does not currently provide autonomous agentic order management itself.
- Fluent Connect (iPaaS) uses third-party AI for rapid integration mapping, code generation, and monitoring (but not for order orchestration logic itself).

Future AI/ML/Agentic Capability

- Roadmap (2026) includes large language model (LLM)-driven analytics (using Google Gemini on top of Google Looker Studio), enabling users to interrogate sales, inventory, and operational data via natural language and receive AI-generated insights.
- MCP server will support more agentic automation in 2025, including order cancellations, modifications, returns, SLA management, and inventory optimization. Additional agentic modules for order sourcing optimization and SLA management are planned.
- Fluent is building analytics-driven, in-app recommendations to advise on operational improvements (ex. capacity thresholds, sourcing adjustments) and aims to move from reactive dashboards to proactive, AI-powered guidance for users.
- The OMS includes visual tools to configure sourcing and orchestration logic; roadmap investments include more self-optimizing, AI-generated sourcing recommendations.
- In the future, customers will be able to use their preferred generative models (Anthropic Claude, Google Gemini), or their own LLMs for code, integration generation, and analytics.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Fluent Commerce open architecture enables connection of external AI/ML and agentic solutions for customer service and supply chain, rather than building a native AI/ML engine into the OMS itself.
- The company's roadmap emphasizes shifting from passive reporting to active suggestions, harnessing analytics and AI to offer decision support both to business and technical administrators inside the OMS.
- The solution is API-first, low-code, and highly extensible, making it easy for retailers to integrate their preferred AI/ML and agentic tools (ex. Intelo.ai, custom LLMs, or an internal data science team).
- Fluent is one of the earliest OMS vendors live in production (July 2025) with an AI agent for WISMO.
- AI-powered conversational analytics, further MCP server use cases, and AI-generated sourcing/optimization remain on the near-term roadmap, aligning with market interest in proactive, automation-ready order management.

Fujitsu

Current AI/ML/Agentic Capability

- GLOVIA OM leverages AI to prioritize orders from various channels using demand prioritization based on factors like customer priority, subscription status, and shipment urgency. The system uses AI to recommend the best fulfillment location or warehouse for orders, factoring in shipping distance, costs, and rejection rates.
- The solution utilizes AI (via Salesforce Einstein AI) for reorder point planning, analyzing sales data, safety stock, seasonality, and supplier lead time to recommend optimal inventory levels. The system's closed-loop planning allows smart fulfillment and stock balancing across sites.
- Machine learning models predict optimal discount scenarios based on demand, order, and inventory data. These models also adapt to changing demand to refine discount recommendations.
- Platform-level AI offers real-time predictive analytics to foresee and prevent delays or order issues. When problems arise, like inventory shortages, AI suggests alternate fulfillment or warehouse options to reduce disruptions.
- Leveraging embedded Salesforce Service Cloud AI, Fujitsu enables Agentic AI use-cases like automated order re-processing, returns management, self-service actions, and intelligent case logging. Returns are supported by AI-driven workflows to optimize outcomes.

Future AI/ML/Agentic Capability

- Fujitsu is actively incorporating Salesforce's Einstein GPT and broader GenAI tools to automate inventory planning, customer service engagement, and more. Future generative use cases include natural-language-based workflows and advanced scenario recommendations.
- The roadmap calls for expanding agentic AI solutions for all business processes—including sales, service, and operations. Forthcoming agentic capabilities will help resolve complex order errors autonomously and adapt to customer challenges at scale.
- Plans are in place to bring more agentic AI features into Distributed Order Management, automating exception resolution and offering increased autonomy in multi-channel sales, service, and operations.
- The future direction includes AI-powered solutions for merchandise planning, optimization, smart in-store workforce management, and deeper unified commerce strategy enablement, leveraging both classic machine learning and emerging Agentic AI approaches.

Overall AI and Agentic Product Strategy, Points of Differentiation

- GLOVIA OM, being 100% native on the Salesforce platform, fully embeds the power of Salesforce Einstein AI, ensuring a unified platform for analytics, decision support, and ethical AI use. This streamlines analytics, AI, workflow automation, and generative use-cases, all maintaining Salesforce-grade compliance and security.
- Fujitsu's AI is not limited to a single function. From order orchestration, fulfillment optimization, inventory balancing, predictive exception handling, through to automated contact center actions and intelligent returns, their AI supports end-to-end OMS operations.
- The roadmap reflects plans to introduce complex error resolution and adaptive order management through multi-step AI agents.
- Through both Salesforce's developer toolkit and Fujitsu's own consulting and in-house data science team, clients can extend, embed, and customize AI/ML/agentic features to suit unique operational requirements.
- GLOVIA OM's AI/ML tools can support both B2B and B2C models, underlining the product's flexibility for major global manufacturers, vertically integrated retailers, and complex transaction sets.

IBM

Current AI/ML/Agentic Capability

- IBM enables agentic workflows such as order inquiry handling, order monitoring, remedial actions, and sample skills for order modifications and transaction queries using tools like IBM Watsonx Orchestrate and Watsonx.ai. Early agentic AI deployments are in place for call center agents, fulfillment managers, and admins.
- IBM uses AI/ML through its Sterling Intelligent Promising (SIP) module to optimize fulfillment decisions, considering cost, speed, margin, and markdown avoidance. Machine learning models are used for dynamic inventory allocation, predictive demand, and optimizing fulfillment nodes based on multiple business-driven factors.
- The platform leverages predictive capabilities to foresee potential order issues or delays. The system can recommend or automate corrections, such as rerouting orders or suggesting alternate fulfillment sources.
- IBM has developed proof-of-concept capabilities for intelligent routing of returned items, aiming to optimize the resale or circularity value of returned products.
- AI/ML models learn demand patterns and help balance inventory across locations to reduce carrying, stockout, and markdown costs.
- The SIP platform calculates carbon emissions related to fulfillment, enabling optimization around sustainability objectives as part of the fulfillment choice.
- IBM has embedded agentic AI capabilities across all OMS personas including call center, fulfillment, admin, and business users to support real-time decisioning, configuration, troubleshooting, automation, and natural language interfaces. These assistants aim to move from recommendations to direct action within workflows.

Future AI/ML/Agentic Capability

- Roadmap includes GenAI for troubleshooting guides, code automation, conversational analytics, inventory and replenishment optimization, and elastic backend resource predictions. Watsonx Orchestrate and foundation models underpin these efforts.
- Developing a next-generation engine enabling cost, speed, carbon, and reliability as tunable AI-driven fulfillment levers, with explainer tools for full transparency.
- Enhanced capability for customer-defined, configurable workflows such as “deliver together,” “split by SKU class,” and more, replacing hard-coded fulfillment logic.
- Planned expansion of “Node Reliability” models to incorporate supplier/fulfillment partner performance data directly into order routing.
- Plans for self-optimizing microservices, automated diagnostics, and fully declarative OMS operation to minimize manual intervention and enable true “cognitive OMS” experiences.

Overall AI and Agentic Product Strategy, Points of Differentiation

- IBM's OMS is notable for its end-to-end integration of AI, ML, and agentic automation ranging from order capture, fulfillment, and returns through exception handling and contact center support. The vision is for AI to act not only as advisor but as an operational executor across all critical roles.
- IBM's focus on agentic AI is advanced, positioning the system to enable AI “agents” (via Watsonx) that can plan, suggest, and act, with human-in-the-loop governance and design patterns that enable both automated and collaborative workflows.
- AI explainer tools clarify why fulfillment decisions are made, and comprehensive ethics frameworks ensure principles such as fairness, explainability, user rights, and data privacy are embedded in all deployed AI.

- The platform is modular and extensible, supporting both out-of-the-box and custom AI/agent models and workflows. Customers can flexibly compose new workflows and optimizations as business needs evolve, including advanced B2B scenarios.
- AI-powered analytics are built into daily OMS operations, surfacing cost, margin, and sustainability impacts in real time. Roadmap ambitions include transforming OMS into a true “cognitive command center” for unified, adaptive, self-optimizing order management.
- IBM’s OMS and AI strategy are tailored not just to retail but to complex B2B, B2B2C, and hybrid models, providing strong automation and predictive insights for enterprise use cases.

Infos

Current AI/ML/Agentic Capability

- Infos uses machine learning for lead time estimation, processing time prediction, and intelligent order routing that factors in current and historical data, SKU location, labor schedules, backlogs, carrier cutoffs, SLAs, and more.
- ML-based dynamic promise logic enables highly accurate ATP (Available-to-Promise) and CTP (Capable-to-Promise), reflecting real-time and historical conditions.
- Predictive transit time models are in production, leveraging carrier data for more accurate delivery promises.
- Intelligent returns are supported with AI recommending return/refund policies and reducing unnecessary returns by analyzing value, demand, and inventory status.
- Optimization APIs enable multi-factor, rules-driven, and real-time sourcing, with user extensibility for custom AI/ML logic.
- Fulfillment anomaly detection and exception handling are being added (in production Q3 2025).
- ML-based models support personalized fulfillment, delivery, and returns based on customer profiles, history, and loyalty status.
- Gamification module tracks in-store productivity using KPIs and real-time dashboards, boosting engagement and efficiency.
- Comprehensive API and headless-first design enable embedding AI logic in external experiences.

Future AI/ML/Agentic Capability

- Late 2025 launch planned for a GenAI-powered workflow builder: business users will describe and refine workflows/rules in natural language, with AI converting this to deployable, executable logic.
- Conversational UI-driven report building and business intelligence are roadmap items as well.
- Multi-agent orchestration will enable collaborative agents for tasks such as exception resolution, failed allocation remediation, and order consolidation.
- Runtime AI agents will handle dynamic exception handling, fulfillment optimization, WISMO (Where Is My Order), and supply chain automation.
- Agents can access internal/external data, call OMS functions, and trigger workflows.
- Customers can plug in their preferred LLMs for GenAI, with enterprise-level control and security.
- Moving from reactive exception handling toward autonomous, continuous execution, self-resolution, KPI monitoring, adaptive learning across the order lifecycle.

Overall AI and Agentic Product Strategy, Points of Differentiation

- All promise and routing logic is transparent and tunable. Business users can configure and extend rules, and ML outcomes are visible rather than “black box” based.

- Extensibility is central so users can augment out-of-box logic and analytics with their own ML/AI models by hooks in orchestration and API layers.
- Infios is quickly coming to market with modern AI/ML capabilities, including pilots with predictive transit times and fulfillment scheduling at the item level.
- Planned GenAI initiatives, including workflow design and anomaly detection, reflect a democratization of process automation and rapid business innovation.
- Key strengths are in B2B, 3PL, and complex supply chain environments. Features like contract-based inventory allocation, advanced segmentation, lot/shelf-life handling, and robust vertical-specific use cases are key points of differentiation.
- The roadmap explicitly calls out AI “copilot” capabilities that enhance rather than replace human decision-making, especially for scenarios where volatility or unique enterprise complexity is high.
- Infios' vision is “proactive, autonomous execution” not just reacting but predicting and acting, with AI agents learning and refining operational resilience over time.
- Early pilots and major investments in conversational GenAI and multi-agent orchestration position Infios at the forefront of OMS agentic innovation.

Jesta IS

Current AI/ML/Agentic Capability

- Jesta IS uses statistics-based, pre-defined algorithms for order routing and fulfillment optimization rather than true AI/ML as of now.
- The recently launched Ask Jane solution incorporates GenAI/LLM for analytics and natural language reporting, enabling users to run queries such as vendor effectiveness and on-time delivery analysis.
- Predictive alerts and delay re-routing are available within Ask Jane, allowing proactive response to supply chain issues. The system can incorporate third-party and external data feeds (e.g., weather, geopolitics) for risk prediction.
- Ask Jane is also able to trigger rapid lookup of orders and initiate downstream processes such as ASN (advance shipping notice) but does not employ deep AI for autonomous decision-making.
- GenAI capabilities through partnerships (such as Anthropic’s Claude) power natural language insights.

Future AI/ML/Agentic Capability

- Jesta IS is engaged in a multi-year AI/ML initiative (targeting late 2025 and beyond) to expand capabilities in forecast, allocation, and replenishment. This will be agentic in nature to deliver prescriptive purchase order and stock movement recommendations, eventually evolving to allow for autonomous operations.
- Price optimization and enhanced order routing/fulfillment optimization are designated as future phases, with delivery planned for the end of 2026.
- Expanding the Ask Jane solution to support more advanced, natural language querying and extend AI-powered analytics/reporting, including more direct business user interaction.
- Longer term roadmap envisions agentic AI for fully autonomous resolution agents that can manage exceptions, planning, and inventory management with minimal human oversight (3–5 year horizon).
- Additional planned enhancements include AI-enriched order routing, connector/IPaaS enrichment, and sustainability scoring.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Jesta IS takes a deliberate, modular approach to AI/ML. Current production use is focused on analytics and prescriptive recommendations rather than deep or autonomous AI.
- Distinctive use of GenAI via their Ask Jane tool delivers natural language reporting and on-demand analytics, providing rapid insights across internal and industry data while strictly protecting sensitive customer information.
- Their agentic AI vision is structured in progressive phases: starting prescriptive, moving toward full autonomy as customer adoption and organizational comfort increases (with human-in-the-loop retention in early years).
- GenAI and ML elements are handled within Jesta's code base, and data is never exposed to external AI engines. Capabilities are permission-based, supporting customer data privacy requirements by design.
- AI and agentic strategies are planned to be embedded not just in OMS, but across their whole retail suite (ERP, Merchandising, Replenishment), creating an intelligence-driven operations environment.
- Immediate AI/ML use cases are selected based on operational impact including forecasting, replenishment, and analytics.
- The roadmap is cautiously ambitious. Real AI-based order routing and fulfillment optimization and autonomous agent use are planned.

KBRW

Current AI/ML/Agentic Capability

- KBRW provides AI/ML-based models rooted in historical and statistical data for intelligent order routing and fulfillment. Machine learning is applied for lead-time calculations to enhance the reliability of delivery estimates. Additionally, the OMS includes statistical inference for delivery date projection and scenario fine-tuning.
- KBRW uses ML for algorithm-based detection and estimation of order issues, focusing specifically on improving lead-time estimation and exceptional situation prediction within workflows.
- Intelligent return processes are supported through standardized return data models, reporting, and analytics features. These combine lead-time models with ML-driven return optimization and analytics, available and demonstrable in the platform's data hub.
- KBRW has established guidelines to ensure ethical, transparent, and auditable use of AI. This covers fairness, documentation of models, data governance compliance, human reviewability, and transparency in decision-making.

Future AI/ML/Agentic Capability and Roadmap

- GenAI is a roadmap item for multiple use cases including improving the integration experience for both developers (e.g., through AI-driven code generation) and business users (using GenAI for BI reporting, data analytics, and user experience). Additionally, customer interface enhancements, such as AI-driven workflow automation, data extraction, and tailored VIP order fulfillment scenarios.
- Exploration is underway to deliver agentic AI capabilities that would act as a "co-pilot" for human operators in both predictable, rules-based scenarios (lean automation) and volatile, hard-to-predict cases (adaptive decision support). These initiatives will be co-innovated, with pilots in progress for major clients.

- Enhanced autonomy for users in OMS configuration through a no-code rule engine supplemented by AI will allow quicker, more efficient adjustment of workflows and business logic, reducing IT dependency.
- Plans exist to roll out additional vertical- and use-case-specific AI/ML models, primarily to support B2B logistics, supply chain convergence, and the unification of planning and execution within a control tower framework (3-5 year horizon).
- GenAI will increase the number and variety of out-of-the-box reports and help automate advanced analysis for vertical-specific KPIs and ESG/ESR reporting.
- Future releases aim to deliver a more unified, AI-driven modeling experience to support continuous product evolution and a seamless front-end for business and IT users.

Overall AI and Agentic Product Strategy, Points of Differentiation

- KBRW's AI/ML focus today is on enhancing reliability and efficiency in core areas like order routing, fulfillment, lead-time prediction, and return management which are all underpinned by empirical data and standard statistical methods.
- KBRW positions agentic AI as a collaborative co-pilot, centering around human-in-the-loop and control.
- AI and agentic features are being designed to operate within a highly modular, extensible microservices architecture that promotes rapid integration of new business logic and enables continuous product evolution without disrupting existing functions. This flexibility is a key differentiator, especially for enterprise clients with diverse integration needs.
- KBRW leverages AI/ML capabilities to specifically address B2B complexities: multi-site allocation, inventory balancing, supply chain recyclability, and circular economy flows. Scenario-based AI deployment is planned around supply chain execution, planning convergence, and vertical-specific optimizations.
- KBRW's roadmap explicitly embraces the ongoing "agentic AI" trend and positions GenAI as a key enabler for user empowerment (e.g., BI/report automation, integration, and customer experience). The focus is not on proprietary LLM engines but on carefully controlled, extensible integration with third-party AI and client systems.

Kibo Commerce

Current AI/ML/Agentic Capability

- Kibo Commerce actively uses AI/ML to optimize order routing, predict inventory needs, provide real-time fulfillment suggestions, and recommend inventory moves. These AI/ML functions are built directly into the platform and are not an add-on for OMS customers.
- Provide AI-driven search to support its commerce and order management functionality, allowing for real-time product and inventory search across locations.
- Kibo Commerce has launched several pre-trained, production-ready AI agents for operational use:
 - Shopper Agent (for direct customer engagement and self-service order flows)
 - Customer Success Agent, Merchandiser Agent, and CSR Agent (for support, merchandising, and analytics).
 - Native intelligent returns management, with an Agentic Reverse Logistics Agent rolling out, provides automated return routing and disposition, improving recovery and ESG outcomes.
- Kibo Commerce's customer service interface features chatbots and AI-enabled actions for CSR order lookup, order editing, and customer self-service.

Future AI/ML/Agentic Capability

- In Fall 2025 and beyond, Kibo Commerce will broaden its agentic offering with new AI agents for Explain (analytics-driven Q&A), Tune (self-optimizing platform adjustments), and additional automation for supply chain, developer support, and forecasting.
- Kibo Commerce is investing in GenAI for code generation, order analysis, and self-service reporting, with a strategy centered on off-the-shelf LLMs safely isolated per client.
- Beta features in late 2025 will introduce AI-driven forecasts at the SKU/location level, alerting users to stockouts and optimizing fulfillment in web demand scenarios.
- Forthcoming agents will be able to instantly tune business parameters based on objectives (like reducing split shipments), surfacing recommendations and implementing them via agentic APIs.
- Greater AI-driven automation of returns, from customer initiation through optimal routing and sustainable disposal or restocking.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Kibo Commerce positions itself as an early mover in practical, out-of-the-box agent-driven commerce operations. Its Shopper, Customer Success, and Merchandiser Agents are generally available (or GA), while other agents are scheduled for 2025. This real-world GA status for agentic commerce is a clear differentiator.
- Kibo Commerce's approach is to pre-train agents for immediate business value, rather than requiring client-side AI/ML model training. This supports rapid deployment and simplifies integration for most brands.
- AI/ML and agentic features are modular and microservices-based, making it easy for businesses to compose only what they need—and to integrate with other tools via 100% API coverage.
- AI agents are targeted at both shopper-facing (conversion, satisfaction) and back-office (order routing, reverse logistics, analytics, developer support) personas, enhancing team agility and efficiency across the board.
- Kibo Commerce uses Google's ML ops infrastructure to ensure per-tenant data isolation and avoids model sharing between clients, keeping trust and privacy central to its AI approach.
- Kibo Commerce differentiates not just with AI/ML, but with its ability to unify OMS, eCommerce, subscriptions, search, analytics, and more. Agentic capabilities are introduced throughout this stack.
- High retention rates, active agentic AI in production, and ongoing multi-vertical deployments demonstrate both commitment and delivery velocity in AI/agentic features.

OneStock

Current AI/ML/Agentic Capability

- OneStock uses machine learning within its orchestration engine to optimize the selection of fulfillment locations. It evaluates dynamic criteria such as store performance, reliability, and workload, automatically adjusting allocations to maximize rapid and reliable order fulfillment. This is available out-of-the-box and actively used by multiple clients.
- The system constantly reevaluates delivery promises during order execution. It leverages forecasts to raise proactive alerts if orders are at risk of delay, recalculates delivery estimates, and communicates updates to customers for enhanced transparency and operational responsiveness.
- OneStock has built and released agents (like an Expert Agent for product configuration and a Configuration Agent for orchestration rules) to help users configure the platform more easily,

leveraging their proprietary MCP server to facilitate connectivity with internal and potential third-party AI agents. These are delivered as part of the core platform.

Future AI/ML/Agentic Capability

- OneStock is actively developing agentic AI for customer service teams (to summarize order status, offer next-best actions, and guide issue resolution) and for store associates (to prioritize tasks and maximize operational efficiency). These are on track for release in the next 12 months.
- Plans include enriching configuration and orchestration agents, building new agentic experiences to simplify setup and management, and using GenAI to accelerate integration, provide BI/reporting support, and enhance VIP order fulfillment.
- While current returns processing is business rules-based, the roadmap includes adding intelligent agent guidance for returns and post-purchase processes.
- Further investment is in ML-driven margin protection, stock allocation, delivery forecasting, and expanding anomaly detection to proactively prevent exceptions anywhere in the order lifecycle.
- With OneStock's MCP server and agentic model, the platform is designed to connect with 3rd-party agents, supporting agent-driven commerce across pre- and post-purchase journeys.

Overall AI and Agentic Product Strategy, Points of Differentiation

- OneStock's orchestration and workflow optimization are fully accessible to business users through visual, no-code tools rather than requiring IT or developer input. This lowers the barrier for real-time process optimization and empowers operational teams.
- The ML models actively learn from and adapt to store and location performance, automatically improving order allocation with minimal need for manual intervention thus helping retailers consistently meet delivery promises and maximize performance.
- OneStock's dedicated MCP server underpins its strategy for agentic and GenAI-powered capabilities, providing connectivity for internal and external agents. This positions OneStock for ecosystem interoperability with future AI/agent platforms.
- The platform is engineered around real-time, precise, and continuously recalculated customer promises for delivery, cost, and sustainability, making the fulfillment experience resilient and transparent for end users.
- OneStock insulates customer data from external AI platforms and only deploys its internal AI agents for highly controlled, specific use cases.
- Many AI/ML features are live and in use today for order orchestration and optimization, with agentic advances brought to configuration and customer service. OneStock continues to invest in GenAI and agentic expansion.

OneView Commerce

Current AI/ML/Agentic Capability

- OneView Commerce does not provide its own AI/ML or agentic capabilities for order routing, fulfillment optimization, issue prediction, or agentic automation within its in-store fulfillment or OMS platform.
- Intelligent order routing, fulfillment optimization, and predictive analytics (e.g., delays, workflow optimization, exception management) are delivered through integrations with partner vendors or external systems, not as part of the OneView Commerce core solution.

Future AI/ML/Agentic Capability

- OneView Commerce explicitly states it is not currently planning to introduce agentic AI into the core fulfillment or in-store order management flow.
- The roadmap emphasizes providing pre-built data pipelines and an MCP for easy data transfer from OneView into customers' centralized analytics or AI platforms, allowing retailers to leverage their own AI/ML for insights across the enterprise.
- While OneView won't natively automate with agentic AI, their strategy is to make it easy for clients to analyze OneView data using their existing analytics platforms, which may include advanced AI/ML developed by the retailer.

Overall AI and Agentic Product Strategy, Points of Differentiation

- OneView's differentiation is a clear separation between in-store operational efficiency and advanced AI-driven optimization. Their platform is agnostic and designed to let retailers choose and connect the best-in-class AI/ML tools or partners suited to their needs.
- The product strategy prioritizes data portability, supporting centralized analytics and AI development owned by the retailer rather than by the vendor.
- OneView ensures all enterprise data used in AI tools is protected, with strict governance, role-based access, no data leakage, and compliance with internal and external policies.
- All current innovation around fulfillment is focused on usability, reduced task friction for store staff, and expanding flexibility in the in-store experience, not on replacing or heavily augmenting these processes via agentic AI or ML.
- They are building an MCP to facilitate seamless and scalable access to OneView data for retailers' analytics and data science teams, while minimizing costly integration or data transformation projects.

Oracle

Current AI/ML/Agentic Capability

- Oracle includes an AI-driven, weighted brokering engine within the OMS. This engine makes fulfillment decisions considering location proximity, gross margin, labor costs, the number of shipments, and other rules. This approach is actively used for dynamic order routing and uses advanced algorithms to maximize profitability and optimize order fulfillment.
- The system features an advanced workflow engine for automated order triage including flagging and routing orders that meet risk or issue thresholds for team review or hold. Escalations are automated if orders are not handled in time, optimizing operational efficiency and ensuring rapid response to exceptions.

Future AI/ML/Agentic Capability

- AI/ML capabilities that can identify/predict order issues or delays, actively rerouting orders in response to weather or real-world disruptions, are roadmap items (not yet production).
- GenAI is planned for agentic chatbots (customer service), fulfillment optimization, and workflow automation. These AI-driven tools will provide recommendations (e.g., exchange on returns, optimal fulfillment scenario) and automate customer interactions, all via Oracle's GenAI partnerships and infrastructure. Integration with Oracle Digital Assistant is expected to enable staff to use natural language queries for OMS support and information.
- Roadmap items include automated AI email responses, and provisioning frontline staff and customers with natural language CX features that streamline return initiation and answer order questions.

- Oracle is evaluating and investing in agentic workflows for proactive exception management and autonomous order management. AI is envisioned as key for demand forecasting, disruption management, and self-optimizing fulfillment settings, but these are future enhancements.
- Plans to leverage both Oracle’s proprietary GenAI services and those of top partners (e.g., Nvidia, Cohere) for advanced language generation, machine-driven fulfillment, and deeper automation.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Oracle’s native SaaS cloud provides a unified data layer for all retail functions, delivering integrated, actionable analytics with minimal effort compared to point solution suites.
- The science engine for order routing allows for tailored, multi-factor optimization (profit, service, cost).
- Out-of-the-box integration between OMS, Commerce, WMS, POS, analytics, and promotional engines accelerates time to value and enables cross-channel engagement and order journeys.
- Oracle participates in global standards development (NIST, AIRC), focusing on fairness, transparency, human oversight, explainability, risk management, and privacy/bias. This is built into all AI expansion initiatives.
- Oracle’s OMS includes a large number of reports as standard, all of which are extensible and connect into modern retail data stores to support statistical, predictive, and prescriptive metrics for a wide range of use cases.

Planet

Current AI/ML/Agentic Capability

- Planet currently does not have AI, machine learning, or agentic automation features for order routing, fulfillment optimization, exception prediction, or intelligent returns.

Future AI/ML/Agentic Capability

- There are plans to utilize GenAI to help facilitate configuration of orchestration scenarios and business rules.
- Planet is implementing MCP, which is designed to allow AI agents to communicate with their platform using natural language and standardized protocols.
- Next-stage innovation includes providing retailers’ AI agents the ability to interact directly with shoppers’ AI agents, potentially enabling agentic checkout and support flows as the market evolves.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Instead of building its own prescriptive AI/agentic functionality, Planet focuses on serving as the master data and process supplier for future agentic commerce—aggregating real-time, cross-system product, availability, pricing, and order data essential for AI agents.
- By embracing MCP and supporting real-time data exchange, the platform is designed to be leveraged by any external AI agent, making it a flexible layer for agentic commerce, rather than embedding proprietary AI-driven order logic.
- Their architecture centralizes critical commerce processes such as cart, checkout, order sourcing, delivery conditions, etc. so that AI and agentic solutions can orchestrate optimal outcomes without barriers between systems.
- By providing APIs, real-time stock and price data, and web-based mixed-cart capabilities and checkout processes through to payment, Planet ensures agentic solutions have the context and control needed to enable purchases and deliver for unified commerce orchestration.

- The primary strategy is not in embedded AI/ML but in readiness for, and facilitation of, AI/agent commerce by making required data and processes available to any agent or protocol, allowing retailers to plug in best-in-class AI as needed without vendor lock-in.

Salesforce

Current AI/ML/Agentic Capability

- Out-of-the-box Agentforce skills for Where Is My Order (WISMO), Returns, and Cancellations. These can be used by call center agents and embedded in shopper self-service experiences across digital channels.
- Additional Agentforce agentic actions for complex order servicing (like item modifications) and optimized returns logistics.
- AI-driven analytics for return reasons are available with Data Cloud consumption credits, surfacing actionable intelligence to reduce returns and improve customer satisfaction.
- Salesforce's proprietary AI Agent platform, Agentforce, is available to perform actions such as summarizing order history, drafting customer responses, and automating order servicing tasks via natural language prompts. These agentic actions are currently used for WISMO, Returns, and Cancellations.
- Integration with Salesforce Service Cloud delivers AI-augmented support, providing recommendations and process automation for common post-order issues.
- Salesforce securely leverages third-party LLMs (like OpenAI) via the Einstein Trust Layer, ensuring robust data security and privacy controls.

Future AI/ML/Agentic Capability

- Launching in October 2025, Salesforce will introduce fully agentic, AI-powered order routing. This includes:
 - GenAI-converted natural language instructions into routing rules and fulfillment logic.
 - AI-driven recommendations for fulfillment locations and transit providers based on cost, time, and logistics optimization.
- Upcoming AI functionality will detect fulfillment issues, reroute affected orders in real-time, and help prevent delays.
- GenAI-powered interfaces will soon allow merchants to use natural language to create and modify business workflows within the platform.
- Continued investment in low-code and pro-code tools for configuring agents and business logic.
- Continued integration with Salesforce Data Cloud for expanded predictive insights and automation across the order lifecycle, including predictive delivery promises and safety stock optimization.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Salesforce is building agentic capabilities into both out-of-the-box workflows and through low-code/pro-code tools, making AI accessible to technical and non-technical business users alike.
- The Agentforce AI which is deeply embedded in the Salesforce platform and paired with the Einstein Trust Layer offers automations while allowing for augmentation with third-party models.
- Agentic AI is being developed for critical phases of order handling from self-service to routing, fulfillment, issue detection, and returns thus enabling a proactive, intelligent, and largely autonomous order management platform.
- Salesforce's AI features are built on strict ethical frameworks, including zero data retention, data masking, and human-in-the-loop governance, positioning trust as a critical differentiator.

- Out-of-the-box and extensible agentic capabilities span not only B2C but also B2B scenarios, with support for tailored workflows, approval processes, and bulk order handling.
- By tightly integrating order management, service, and data cloud capabilities within the broader CRM platform, Salesforce delivers a highly differentiated, single-data-model approach to agentic commerce that is especially powerful for enterprises seeking unified commerce and customer 360° strategy.

SAP

Current AI/ML/Agentic Capability

- There are no production AI/ML/agentic features currently live within SAP OMS as of August 2025.
- Some advanced AI-driven capabilities (fraud detection, returns optimization, exception prevention, agentic process flows) are actively being developed, co-innovated with customers, or in pilot/testing stages only—not generally available in released product.
- SAP Business Data Cloud, providing a retail data hub for SAP and third-party data will act as the foundation for the AI capabilities, and planned OMS use cases are not deployed yet.

Future AI/ML/Agentic Capability

- Autonomously detect and resolve fulfillment issues (e.g., Agentic Order Guardian) is launching in late 2025.
- AI-powered monitoring, prediction, and rerouting of at-risk orders due in late 2025.
- GenAI and AI agents for scenario analysis, conversational analytics, code/extension generation, and “next best actions” in the contact center is on the near-term roadmap.
- A proprietary SAP GenAI module powering analytics, workflow generation, and cross-solution agentic orchestration “Joule Co-pilot” is in development.
- Customers can use their own agentic platform and MCP to leverage the OMS APIs which is built on a micro service architecture. Additionally customers can leverage SAP’s GenAI and agentic platform allowing customers to choose the LLM of their choice.
- SAP OMS is pre-integrated to SAP Commerce Cloud & ERP solutions, but for agentic utilization, the goal is for OMS agents to be part of a multi-agent cohort from across domains. If the customer is running SAP Commerce Cloud, SAP ERP, and SAP OMS solutions, then use cases will be offered that cross application domains where corresponding agents can collaborate (Joule Agents).
- Fraud detection, exception management, returns optimization, advanced workflow orchestration, and real-time operational insights.
- Composable/agentic workflows and robust API/event-driven architecture to easily integrate AI/agentic automation in future OMS releases.

Overall AI and Agentic Product Strategy, Points of Differentiation

- SAP’s OMS roadmap is aggressive, aiming for broad coverage and deep integration for 2025 and beyond.
- The vision is a modular ‘bring your own agent’ framework with SAP’s own Joule GenAI orchestration layer, enabling SAP and customers/partners to select, tune, and integrate best-fit AI agents for unique needs.
- SAP is explicit about responsible, explainable, and secure use of AI, reflecting German/EU best practices; this could be a meaningful differentiator for global brands and regulated industries.

- The system is designed for AI-driven, composable automation—business users and IT can create workflows and agentic automations without heavy code, leveraging SAP’s low-code/no-code tools and event-driven architecture.
- The AI/ML/agentic roadmap is part of a broader ‘one SAP’ initiative, tightly integrating SAP OMS, Commerce Cloud, ERP, and Business Data Cloud for internal/external agent interoperability and holistic business intelligence. For POS, SAP has a broad strategy with their own cloud POS/mPOS solution announced in July, as well as close partnerships with other POS solution providers.
- Many planned features result from close collaboration with actual clients, ensuring business-relevant priorities and solution flexibility.
- Not “AI in OMS for AI’s sake” but deep, business-centric integration, strong compliance posture, and an open agentic platform approach that encourages client choice and composability.

Teamwork Commerce

Current AI/ML/Agentic Capability

- Teamwork Commerce uses AI/ML to optimize order routing, considering factors such as inventory, distance, cost, and fulfillment capacity. This enables workload balancing across fulfillment locations and predictive constraint alerts.
- The system provides predictive insights to flag potential fulfillment or order issues that could cause delays. Retailers can intervene proactively based on these predictions.
- Fulfillment, Picking, and Inventory Optimization:
 - AI/ML and integrations (including with external platforms) support route/pick path optimization for in-store fulfillment.
 - Automation is in place for inventory balancing, with machine learning powering recommendations for transfers and replenishments.
- Teamwork Commerce offers proprietary GenAI to assist store associates and customers in quickly finding products and product information, and to help with support needs.
- The OMS provides automated exception identification and alerts (not strictly AI-powered), including quick-view panels for root cause analysis and self-service/order modification tools.

Future AI/ML/Agentic Capability

- Teamwork is actively developing Agentic AI capabilities aimed at operational streamlining and superior shopping experiences. These capabilities are being expanded as part of a broader commitment to intelligent, scalable retail operations and customer satisfaction.
- Planned feature releases include more advanced AI/ML to further improve fulfillment, inventory, and supply chain decision-making (rollout expected in the next quarter-’25 Q4).
- AI/ML tools under development will enhance the returns process, making it more intelligent and adaptive. Integrations with partners like Loop and Narvar enable even more AI-driven return management.
- Plans are underway to scale up GenAI capabilities to support both associate tasks and customer self-service, including product discovery and support interactions.
- Continued investments are being made to embed agentic automation and decision-making across the OMS and unified commerce stack.

Overall AI and Agentic Product Strategy, Points of Differentiation

- Teamwork Commerce uniquely positions itself as a "true unified commerce platform," tightly integrating OMS, POS, inventory management, CRM, analytics, and omnichannel fulfillment. AI is applied not as a bolt-on, but as a core capability within this unified environment.
- The company couples proprietary AI (for routing, fulfillment, and product discovery) with integrations to external best-in-class partners, providing clients flexibility and rapid access to new AI features. This hybrid model balances control and extensibility.
- Teamwork has developed its own GenAI engine, distinguishing itself from most retail OMS vendors, who rely on third-party or partnership models for GenAI. This enables vertical customization and the ability to rapidly support new customer and associate AI use cases within the platform itself.
- Teamwork has formal governance, approval, and disclosure requirements for any AI or GenAI deployment—covering data protection, licensed tool use, model transparency, and human-in-the-loop review. This reflects a structured, risk-managed approach that is attractive for retailers concerned with AI ethics and compliance.
- The platform's microservices architecture, open APIs, and support for low-code/no-code customization leaves Teamwork well positioned for the rapid evolution as AI/Agentic technologies and their advancement.

Positioning Maps

Just providing software revenues for individual vendors doesn't paint the whole picture. In this section, we attempt to provide a more accurate representation of the leading software players' true position in the market.

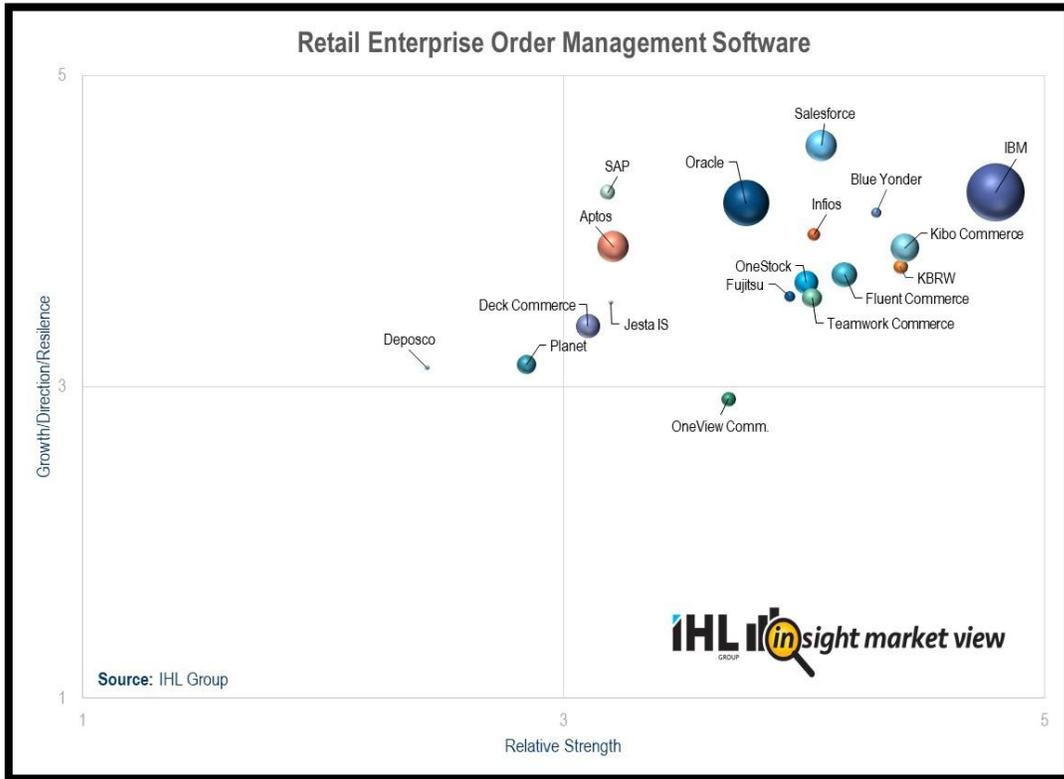
The IHL Insight Market View Positioning Map displays vendors by innovation, market strength, and market share. It is a 3-dimensional view of the market that takes into consideration the scale of the vendors involved and not just direction. So, the reader gets to see size of strength, not just position of strength.

Over 80% of the ratings and positioning come from completely objective measures leveraging our WorldView IT Sizing and Forecasting model and our Sophia data service which tracks installs by vendor. Less than 20% of the total positioning is in any softer measure such as review of innovation or customer satisfaction. For this 20% we have undertaken new measures with this year's report to ensure there is no bias. Our analysis demonstrates a clear commitment to objectivity in evaluating each solution.

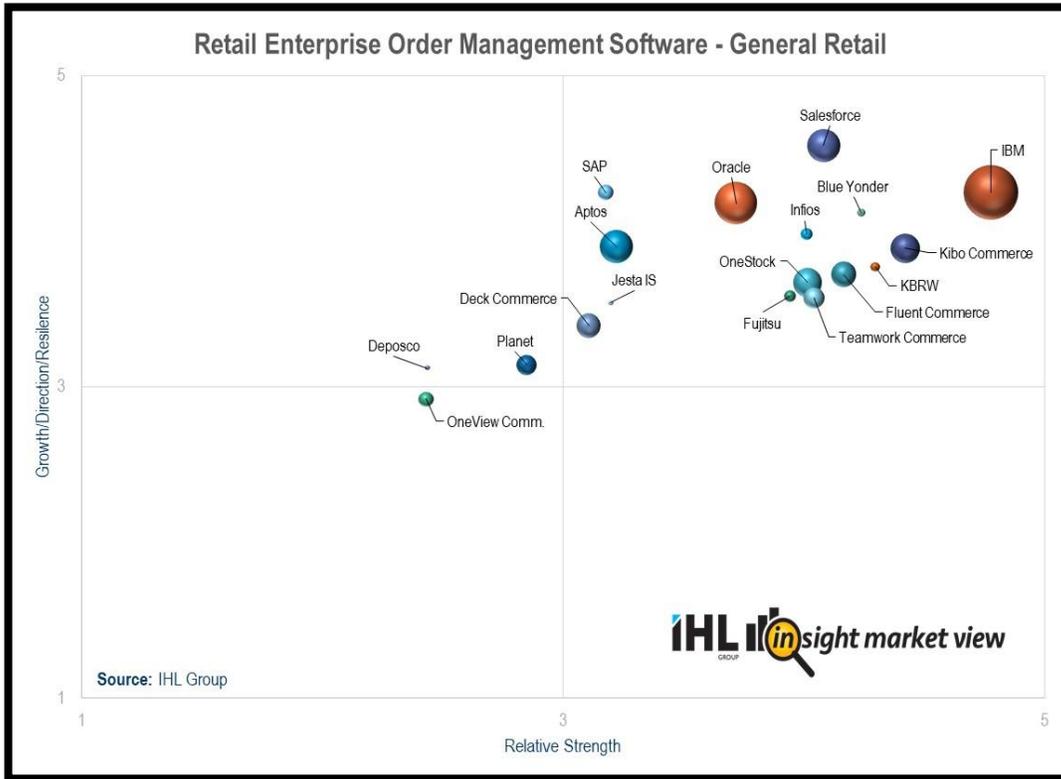
Here are the categories that make up each axis.

X – Market Strength	Y – Growth/Direction/Resilience	Z – Market Share
Global Reach	Revenue Growth Trend	Market Share
# Retail/Hospitality Accounts	Customer Satisfaction	
Size of Accounts	Unified Commerce Coverage (BI, Commerce, Merch/SCM, Sales & Mktg, Store Systems)	
Functionality across 13 Key Categorizations	Stability/R&D Commitment/Funding	

Total OMS Software – Overall



Total OMS Software – General Retail



OMS Providers' Key Differentiators

Leading Commerce Providers

We strongly believe OMS is foundational for success in today's modern retail enterprise. Depending upon a retailer's size and history, it often helps define the choice of either an integrated suite or best-of-breed solution. There is truly no one-size-fits-all approach. For retailers seeking counsel in these areas, our REAP Advisory reports are a ready resource for that advice. Based upon those reports, our research, and the information on installations we've been able to collect, we wanted to provide a summary of the key vendors in the key areas and their predominant deployment tier. For inclusion in the subsequent table for General Retail and FDCM, we applied the following criteria by solution:

- OMS – at least 10 WW accounts at that level

This is based upon known accounts in IHL Group's Sophia Retail Data Service, covering the leading 5,000 retailers in the US and EMEA. In reviewing this chart, one should not consider this to be an exhaustive list of the only vendors that might service accounts across the three groupings charted here. In Sophia we have over three hundred unique vendors providing solutions in these three areas across North America and Europe.

Additionally, one should not infer that because a vendor is listed in Tier II that they are not able to service Tier I clients. Similarly, a vendor in Tier III should aptly be considered for Tier II and potentially Tier I opportunities. As an even further qualifier, retailers can often have unique make-or-break type requirements, so just because a vendor is listed in Tier I, they may not be best suited for all opportunities at that level.

Furthermore, if a vendor had 8 Tier I OMS accounts, and several others in the Tier II space, they were put in the Tier II block. For retailers wanting specific details on client installations used in this analysis, please feel free to schedule a call with us.

One final note: These observations are based upon our research or public information vendors have shared with us. Some vendors have either chosen not to provide feedback, or company rules prohibit them from sharing. It is our experience that vendors freely share references with retailers, so we recommend that retailers query a broad array of vendors prior to forming their short list.

Leading OMS Providers

	General Retail		FDCM	
Tier I	Aptos Blue Yonder Fluent Commerce IBM	Kibo Commerce OneStock Oracle Salesforce SAP	Blue Yonder IBM	KBRW Oracle SAP
Tier II	Deck Commerce Fujitsu KBRW	Infios OneView Teamwork Comm.	Fluent Commerce Infios	OneStock OneView
Tier III	Deposco Jesta IS	Planet	Aptos	Kibo Commerce

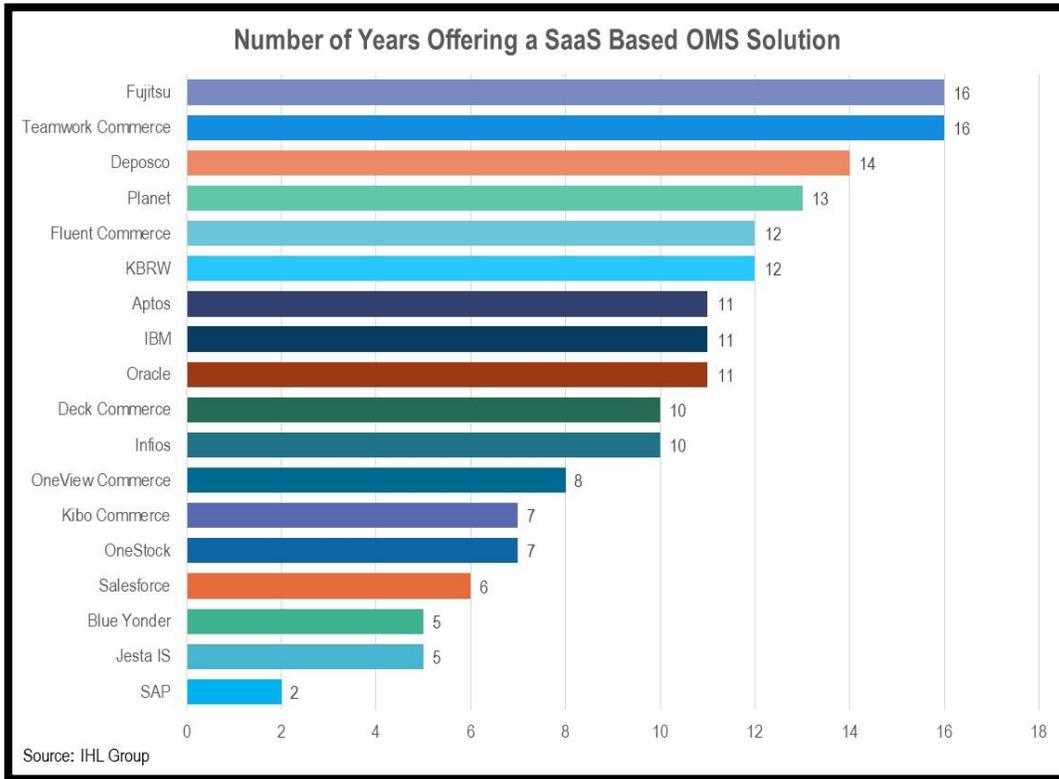
Leading Commerce Providers' Metrics

The next 12 charts highlight some of the key comparative metrics between vendors. These are meant to highlight some of the key differentiators among vendors. These can be used as pre-screening metrics, or the basis for further questions.

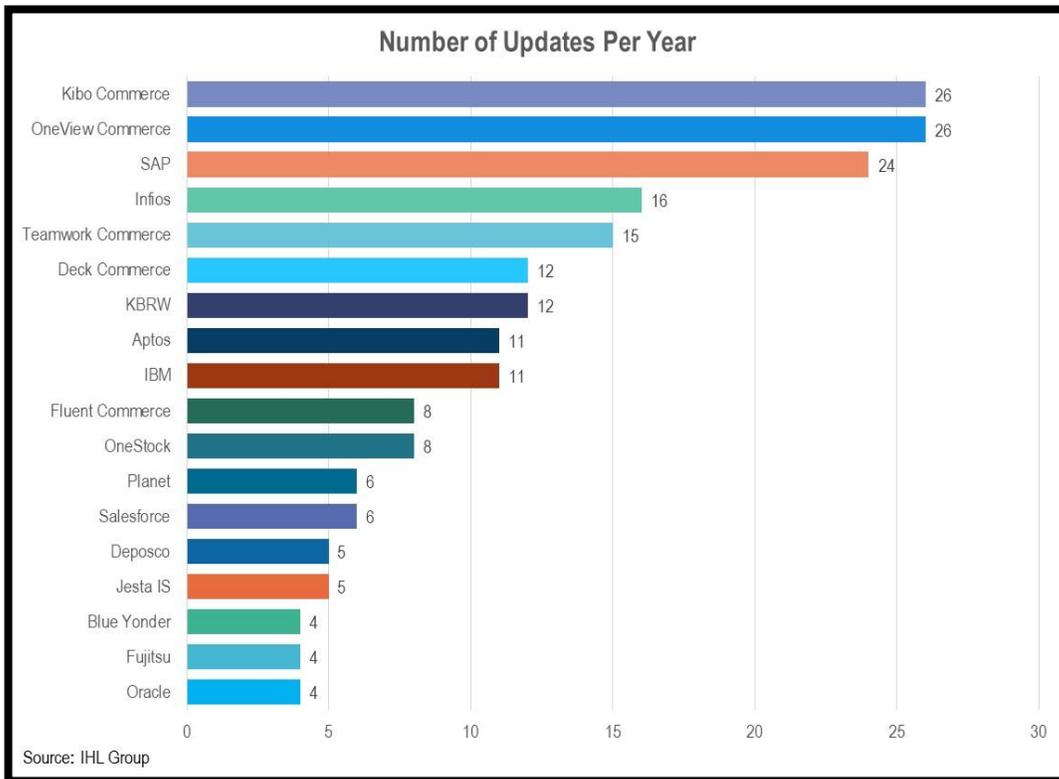
These charts attempt to highlight differentiators in the following areas:

- Internationalization
- Architecture
- Vendor size and range of OMS accounts serviced
- Vendor momentum
- Systems integration performance
- Processing Speed, and
- Reporting

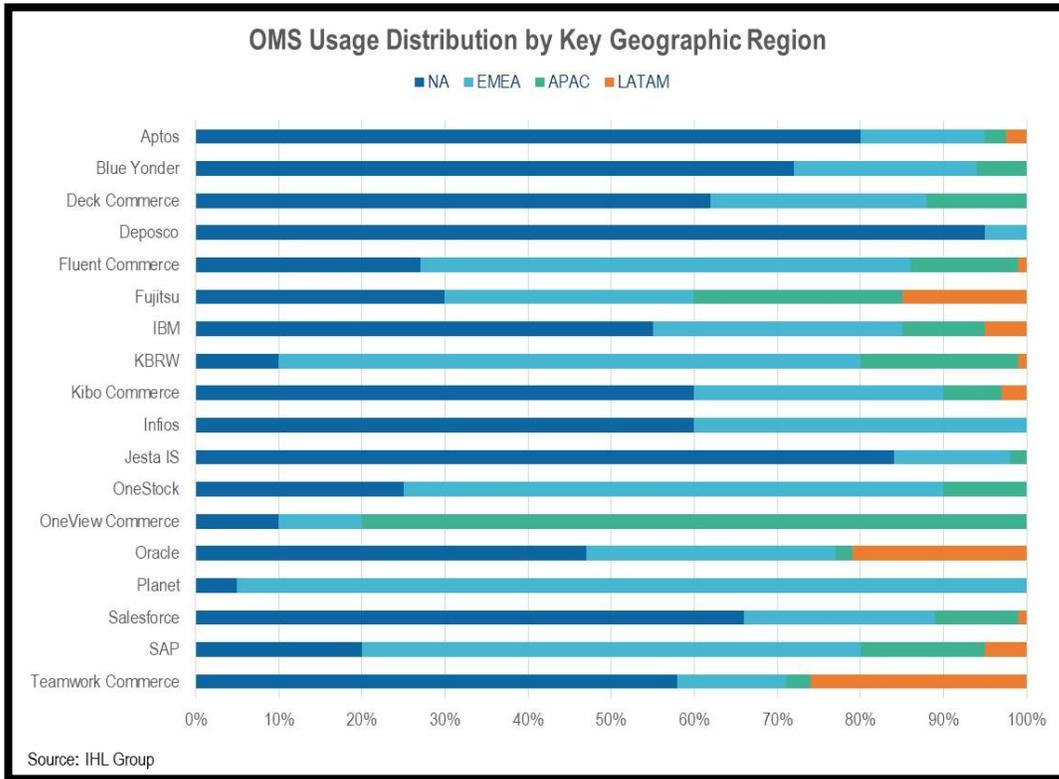
OMS Characteristic: Years Offering SaaS-Based OMS Solution



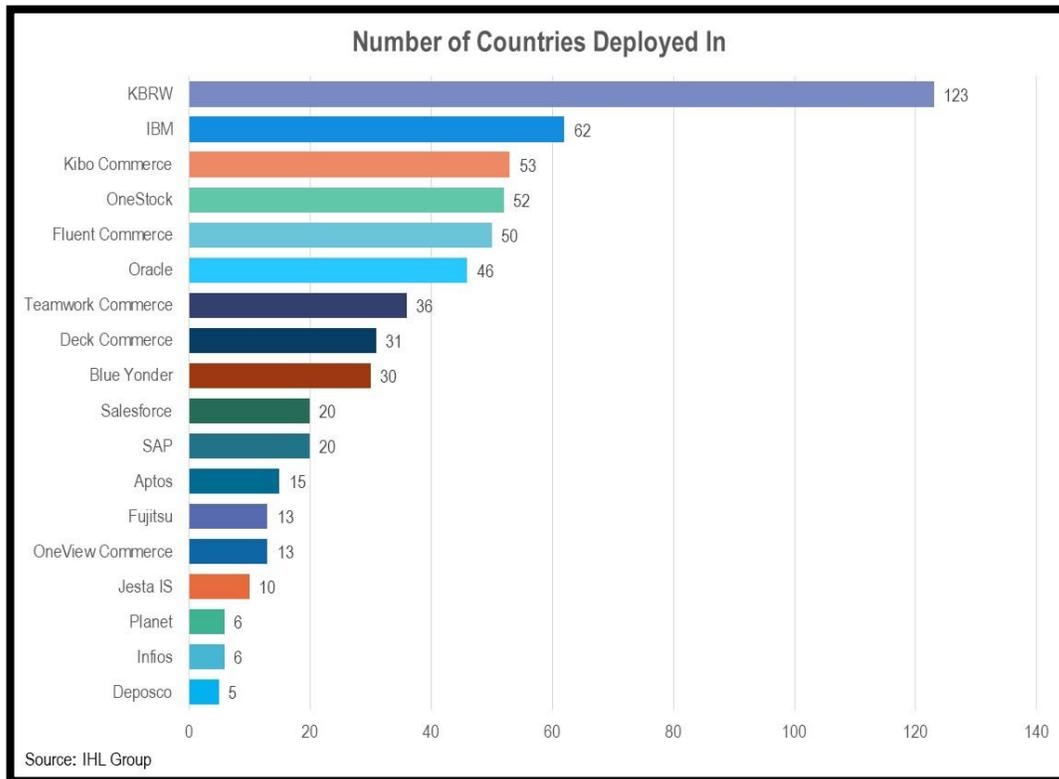
OMS Characteristic: Yearly Updates



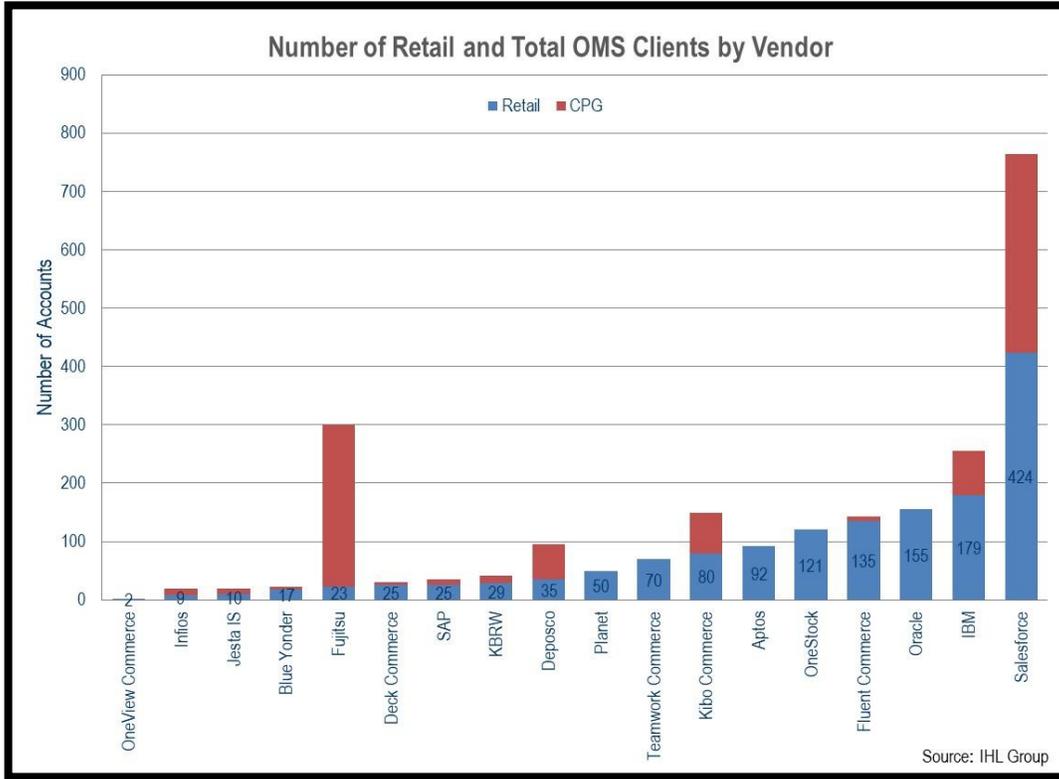
OMS Characteristic: Geography



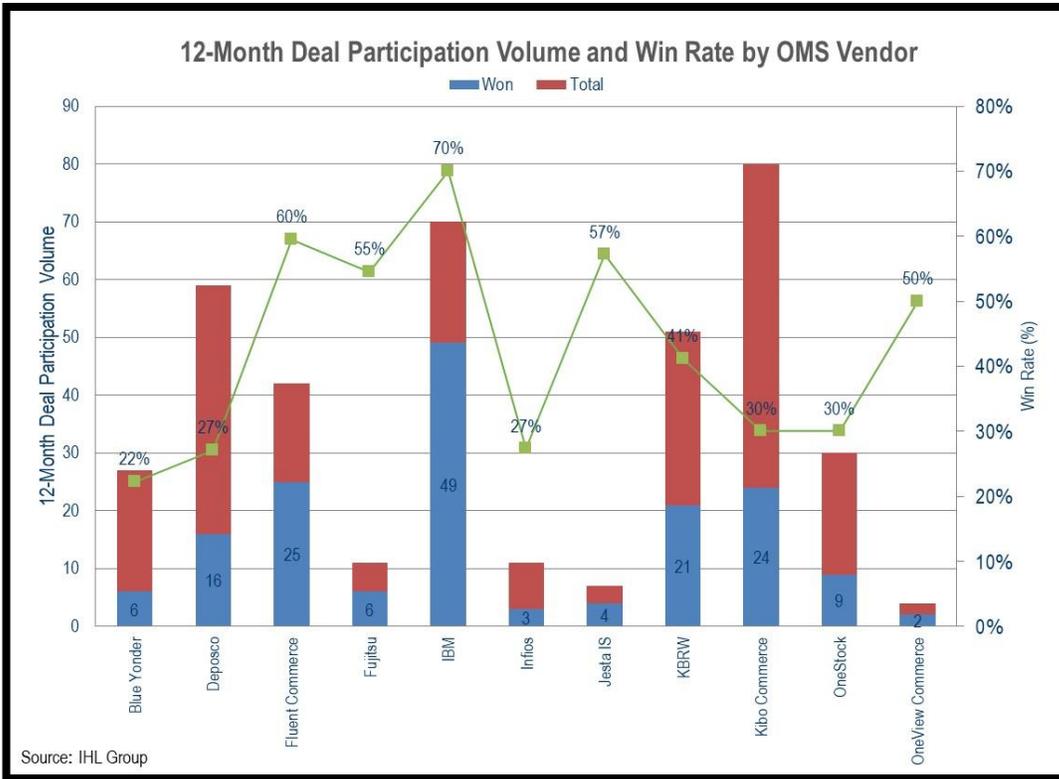
OMS Characteristic: Country Experience



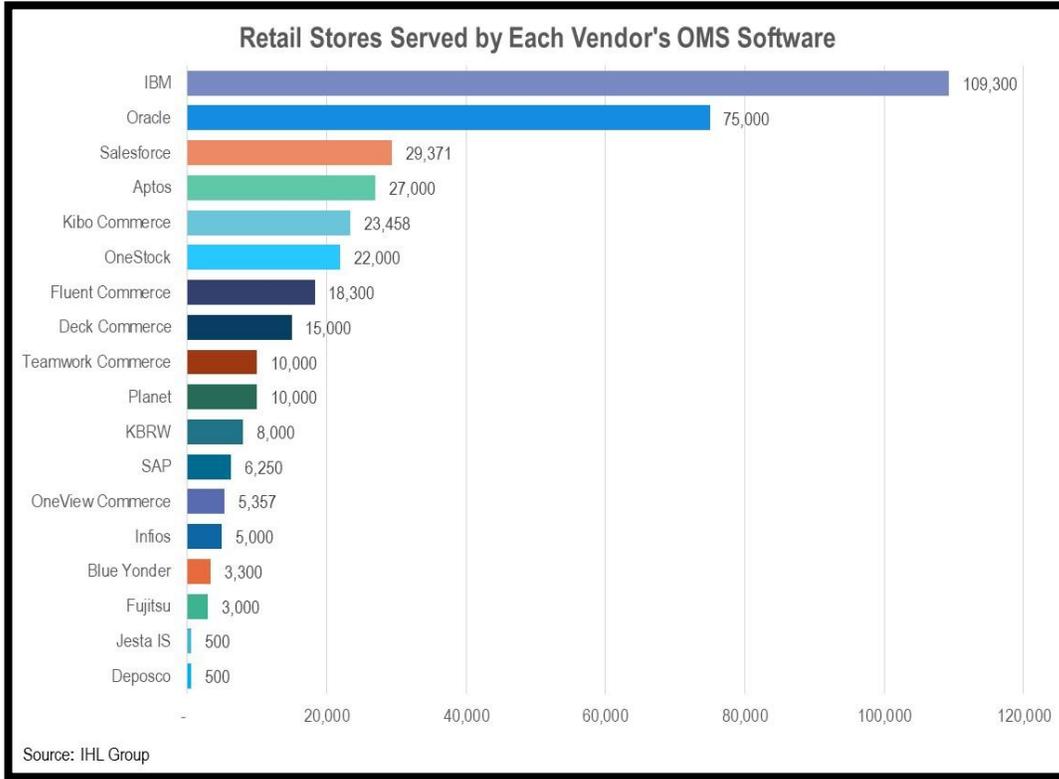
OMS Characteristic: Total OMS Clients



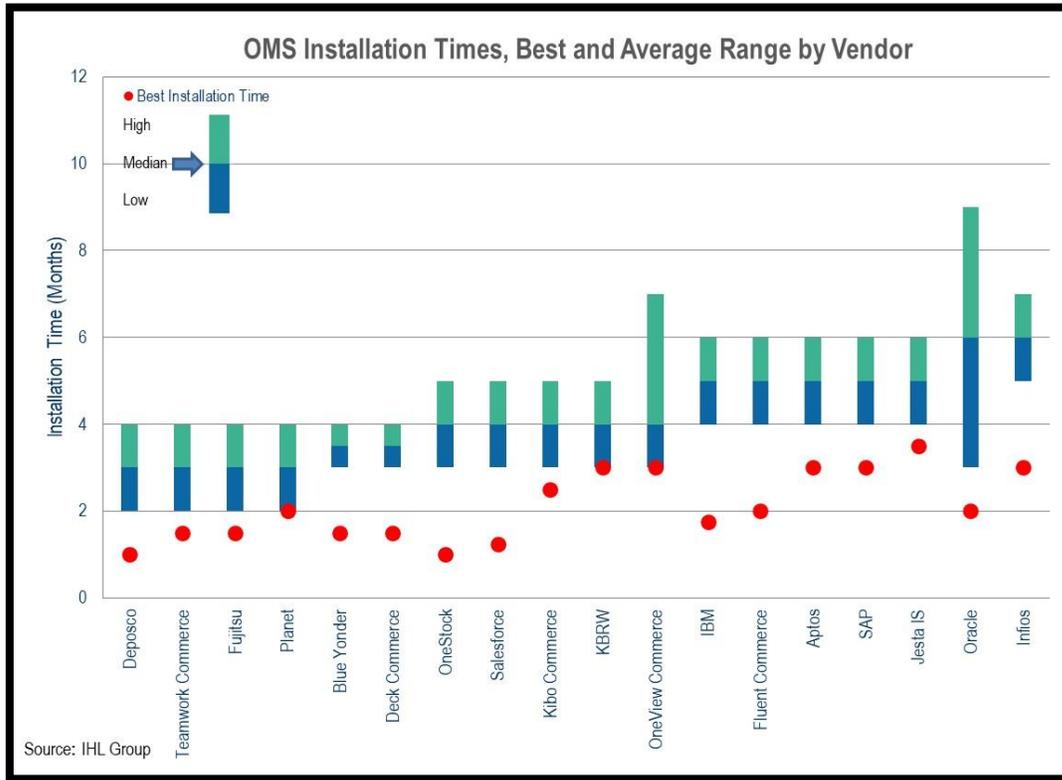
OMS Characteristic: New Business



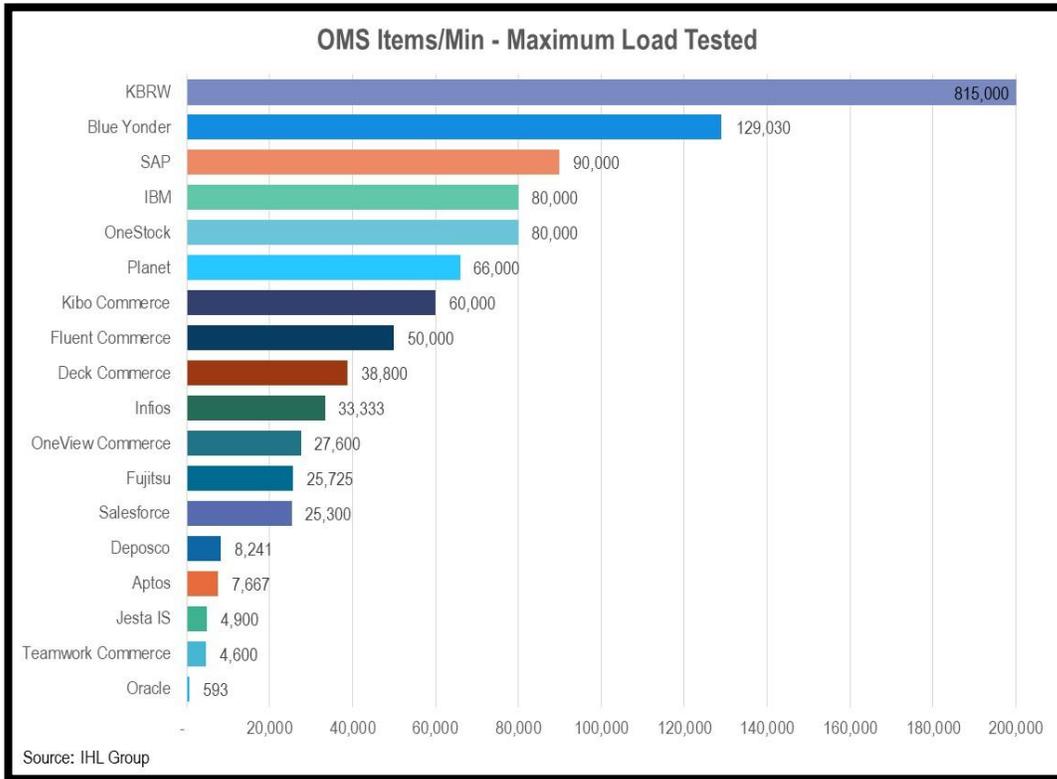
OMS Characteristic: Retail Locations Supported



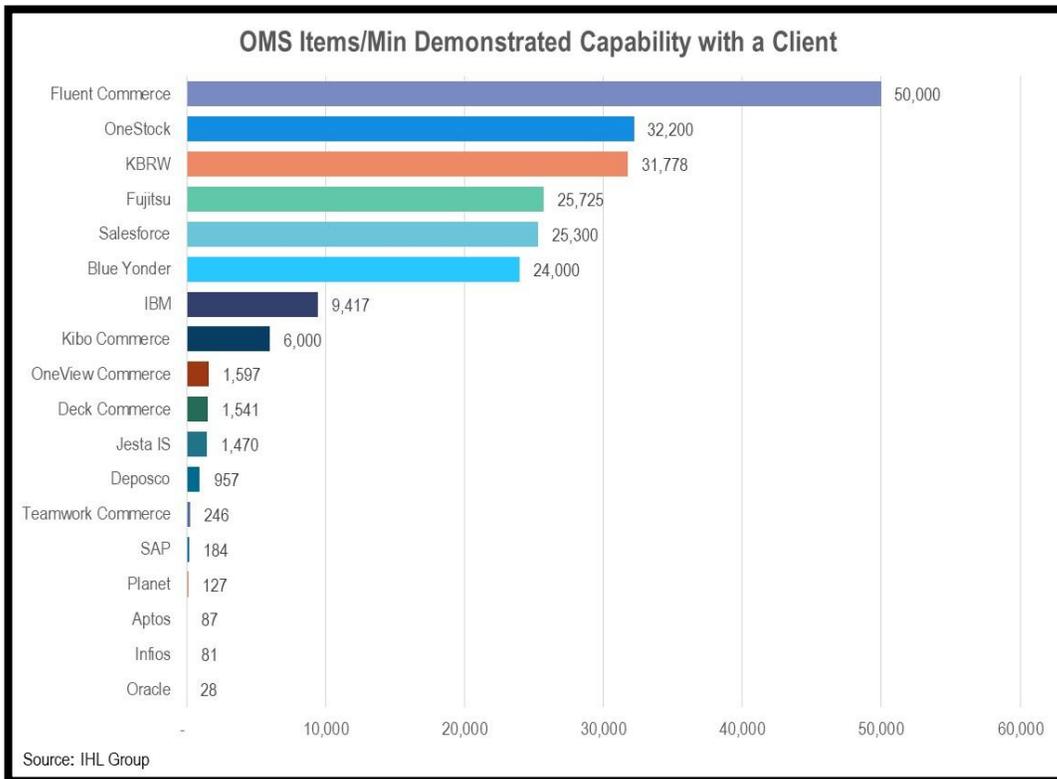
OMS Characteristic: Integration



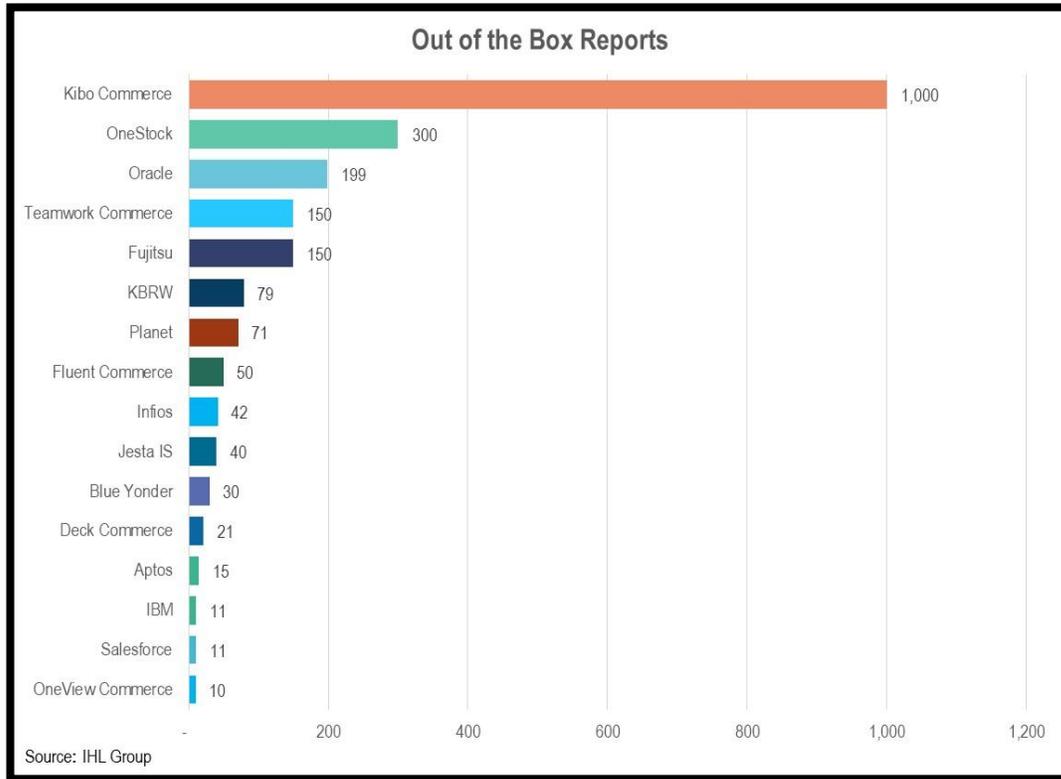
OMS Characteristic: Validated Order Speed



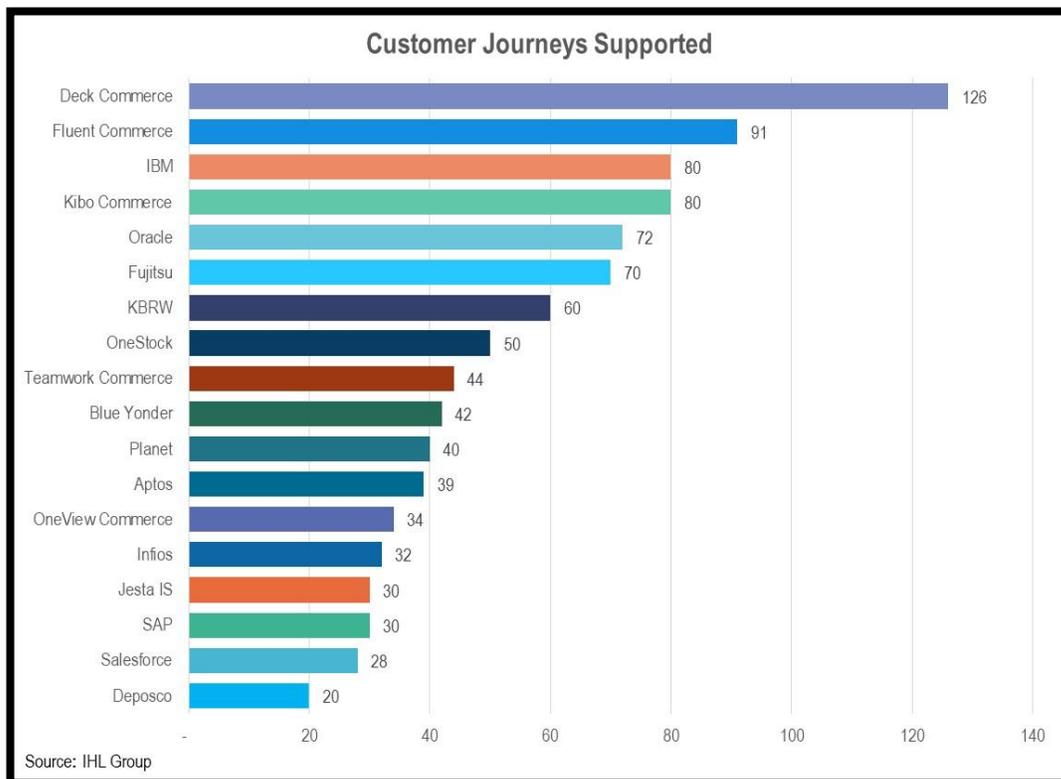
OMS Characteristic: Production Order Speed



OMS Characteristic: Ready Reports



OMS Characteristic: Customer Journeys



Key Observations/Differentiators of the Leading Vendors

The summaries which follow are based upon interviews and briefings with vendors and retailers. This is not meant to be exhaustive, but highlights either those items emphasized in the interview, or items that we felt were differentiators or salient relative to an OMS selection.

The reality is that there are several hundreds/thousands of features and functions that drive an OMS selection. A vendor's value proposition is much more detailed than can be captured in a few bulleted items. With that noted, the observations that follow note the responses and areas that were differentiated. These comments are drawn from general understanding, the briefing process as well as the 76-question survey each vendor filled out.

We have only included summary profiles on those vendors that responded to the questionnaire. This is the same approach we took in the preceding charts to limit it to only those vendors who were able to respond.

Should you have questions on any vendors, our observations or any metrics, please feel free to reach out.

Infios

Technical Architecture & Deployment Flexibility

- Infios OMS is delivered as a modern, fully modular microservices platform, supporting both single-tenant and multi-tenant cloud deployments. Each core domain (Order Orchestration, Inventory, Promising, Store Fulfillment, Returns, etc.) is an independently deployable microservice, providing horizontal scalability.
- Standard cadence of 4 major and 12 minor updates annually, plus ad hoc feature releases, enables customers to access new features or critical fixes with minimal disruption.
- Kubernetes-based architecture ensures elastic scaling—standard deployments handle 3,000+ TPS with sub-200ms latency, and advanced workloads achieve up to 400,000 orders/hour (≈2 million line items/hour), even for complex B2B flows.
- Infios had a perfect score in our assessment of B2B functionality and Roadmap, tied for others in first place and a second-place scoring in Architecture.

Integration, iPaaS, and Extensibility

- Infios includes a native integration platform as part of its core offering, enabling real-time event-based messaging, workflow orchestration, and pre-built connectors for ERP, WMS, eCommerce, logistics, and more.
- Pre-configured accelerators and adapters exist for Shopify, Salesforce, NetSuite, Dynamics, SAP, and key WMS platforms, reducing complex integration and onboarding time.
- Embedded no-code/low-code interfaces allow business teams to configure workflows and integrations, lowering IT dependency and speeding change cycles.

Performance, Scalability, and Availability

- The solution handles high-load scenarios, with real-world testing at 400,000+ orders/hour and successful B2B runs with orders containing up to 2,000-line items.
- 99.99%+ uptime SLA for fault tolerance and always-on operations.
- Dedicated separation between user-facing and backend workloads enhances security and ensures consistent user experience even during heavy background processing.

Omnichannel & B2B/B2C Depth

- Natively supports a wide array of omnichannel and B2B requirements, including contract-based inventory allocation, order orchestration, dynamic order splitting, recurring/subscription orders, marketplace orders, and EDI integrations.
- Supports real-time ATP, dynamic allocation, segmentation, and fair-share logic for both planned and immediate orders. Powerful rules engine and optimization models for fulfillment node selection considering cost, capacity, labor, tariffs, SLAs, and more.
- Full support for complex subscription schedules, B2B auto-replenishment, and self-service adjustments for frequency or pause/resume scenarios.
- Market growth focuses on Tier-2, Tier-3, and 3PL, with strengths in segments with high complexity or multi-party logistics requirements.

AI, Optimization, and Scenario Simulation

- Incorporates AI/ML for delivery promise accuracy (ATP/CTP), predictive lead times, cost-based sourcing, markdown/tariff avoidance, and workload balancing across distributed nodes and fulfillment types.
- "Optimized Fulfillment Plan" API allows business users to simulate fulfillment scenarios, comparing outcomes for different cost, speed, or sustainability objectives and customizing optimization parameters as needed.
- Proprietary solver engine factors in extended real-time variables for optimal node selection—inventory, distance, capacity, tariffs, labor, carrier SLAs, and more.

Rapid Implementation & Change Management

- Average installs are 5–6 months for the full solution, but modular rollouts of core services can go live in 8–16 weeks. Accelerators further reduce time-to-value, especially for critical integrations and typical omnichannel processes.

- In-house advisory services cover omnichannel strategy, labor optimization, network design, and unified commerce best practices, not just tech deployment.

Advanced User Experience, Extensibility, and Customization

- Business users can change business rules, order flows, SLA definitions, and reporting without IT involvement via portal-based management tools.
- Deep support for preferred delivery windows, personalized communications, and targeted promotions—leveraging customer profiles, history, and loyalty data in real time across sales channels.
- Out-of-the-box support for nearly the entire spectrum of customer order journeys (B2C, B2B, marketplace, call center, subscription, etc.), fully configurable and extensible for new business models.

Contact Center & Unified Commerce

- Native call center interface for order creation, modification, returns, and upsell, with recent enhancements in workflow automation and compliance auditing. Embeds AI for WISMO queries, returns guidance, and optimal policy recommendations.
- Deep integrations with WMS, TMS, labor management, and BI tools. 1,500+ out-of-the-box connectors support rapid unified commerce deployment.

Security, Compliance, and Globalization

- SOC2, ISO27001, PCI, GDPR, and CCPA compliance, with multi-region deployments and tiered data controls for regulated environments.
- Deployments span key markets in North America and EMEA with robust multi-language, multi-currency, and regional compliance support.

How We Got Here

The IHL Insight Market View series is part of the IHL Retail Executive Advisory Program. This is the first of several research studies to be released and it is only available as part of an advisory relationship. The IHL Insight Market View research studies combine several of IHL's best-in-class research components into a single industry view meant for retailer and vendor executives.

Step 1 – We leverage our WorldView IT Sizing Forecast Model, a sizing and forecast tool for over 300 retail Hardware, Software, SaaS and Services categories. IHL has been sizing and forecasting the retail/hospitality market worldwide by solutions for over 10 years. This provides the upper bounds of the market data and total market size.

Step 2 – We combine this with our Sophia Data Service that tracks over 4,500 enterprise retailers and hospitality providers (with a minimum of 50 locations) in terms of which vendor's technology a given retailer/hospitality provider has installed, the total lanes/licenses, the timing of those installations and when they are due to be replaced.

Step 3 – We validate the installs and business sizing for each vendor through public records and vendor/channel interviews. Customer service/traction is validated through existing customer interviews and surveys.

Step 4 – We merge all of this together into a singular view that not only provides total market size, but also market share and scale of difference between vendors.

This study represents the overall worldwide retail and hospitality Software and Software-as-a-Service market. For more information on the additional studies being released as part of the Retail Executive Advisory Program, please see our website or contact us at +1.615.591.2955.

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