

Inventory Optimization & MEIO

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting inventory optimization and multi-echelon (MEIO) software: what these systems do, how the market and vendors stack up in 2026, what they cost, how to run the selection, and how to de-risk the rollout.

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

Contents

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

1. Executive summary

Inventory optimization is the discipline of holding the right stock, in the right place, at the right time, so that service levels are met without tying up more working capital than the business can afford. The software that supports it sets safety-stock levels and inventory policies mathematically rather than by rule of thumb, and the most capable systems do so across an entire multi-echelon network at once, balancing stock between plants, distribution centers, and forward locations. This is a focused capability, distinct from the broad supply chain planning suite and from demand planning, both of which Supply Chain Research covers separately. In 2026 the category is being reshaped by probabilistic methods, multi-echelon optimization, and the first agentic, self-adjusting inventory policies.

This guide is written for supply chain, inventory, and finance leaders evaluating an inventory investment, and for the teams who must integrate it and earn planner adoption. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best platform, because the right choice depends on your network complexity, data maturity, industry, and whether you are buying inventory optimization alone or as part of a wider planning program. The pages that follow define the category and the single-versus-multi-echelon distinction, size the market honestly across its very different definitions, profile the best-of-breed, suite, service-parts, and ERP-embedded tiers, lay out an evaluation framework, and explain why data quality and the working-capital case, not the algorithm, decide the return.

\$1-9B range of 2025 estimates, from narrow multi-echelon optimization to broad inventory optimization software	No MQ there is no standalone Gartner Magic Quadrant; inventory optimization is evaluated within the planning quadrant	Working capital the defining business case: the same service level at lower inventory, or higher service at the same investment
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What the evidence says

The category boundary drives the market spread. Multi-echelon optimization is sized near \$1.5B, broad inventory optimization software nearer \$6B to \$9B, and these overlap the supply chain planning and demand planning markets, so beware double-counting.

There is no standalone inventory-optimization Magic Quadrant. Gartner evaluates inventory optimization as a use case within the Magic Quadrant for Supply Chain Planning Solutions, so specialist rankings and references carry more weight.

Multi-echelon is the deep capability that separates vendors. Optimizing each location in isolation leaves stock stranded; multi-echelon optimization balances the whole network and is where the best-of-breed specialists earn their place.

Data quality, not configuration, is the usual failure point. Poorly maintained lead times, inconsistent units of measure, and unclear location hierarchies stall implementations more often than the software ever does.

The return is a working-capital story. Inventory reduction, fewer stockouts, and less obsolescence release cash; the headline percentages are vendor-sourced and should be proven on your own network.

2. What inventory optimization software is

Inventory optimization software determines how much stock to hold and where, then sets the policies that keep it there. It is a focused capability within the broader planning landscape, and this guide treats it on its own terms rather than as part of the full planning suite. The core capabilities are:

- **Safety-stock and policy optimization.** Calculating safety stock, reorder points, and order quantities mathematically from demand variability, lead times, and target service levels.
- **Multi-echelon optimization (MEIO).** Balancing inventory across the whole network, plants, distribution centers, and forward stocking locations, rather than optimizing each in isolation.
- **Service-level optimization.** Setting differentiated service targets by product and customer, and finding the lowest inventory that meets them.
- **Probabilistic and stochastic modeling.** Treating demand and supply as ranges of outcomes rather than single numbers, which is what makes optimization robust to variability.
- **Inventory segmentation and analytics.** Classifying items by value, volatility, and role, and reporting on excess, obsolescence, and stockout risk.
- **Links to planning and replenishment.** Consuming the demand forecast and feeding replenishment, sales and operations planning, and integrated business planning.

Single-echelon versus multi-echelon

The most important distinction in the category is between single-echelon and multi-echelon optimization. Single-echelon optimization sets inventory for each location on its own, which is simpler but tends to over-stock, because every node carries its own buffer. Multi-echelon optimization, MEIO, optimizes the network as a whole, positioning stock where it protects service most efficiently and removing the duplicated buffers that single-echelon methods leave behind. MEIO is mathematically harder and depends on good network and lead-time data, but it is where the largest working-capital gains are found, and it is the capability that most clearly separates the best-of-breed specialists from lighter tools.

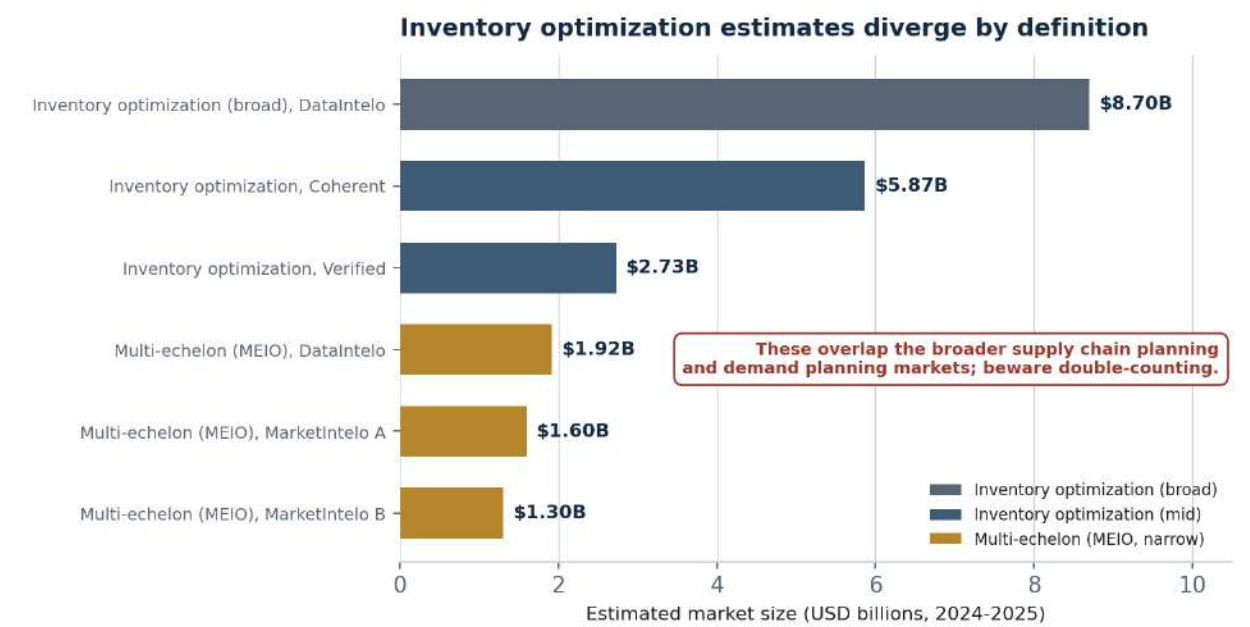
How it relates to demand planning and the planning suite

Capability	What it does	Relationship to inventory optimization
Inventory optimization	Set stock levels and policies	The subject of this guide
Demand planning	Forecast future demand	Provides the demand input
Replenishment	Execute orders to policy	Consumes the policies
S&OP / IBP	Align demand, supply, finance	Encloses inventory planning
Supply planning	Match supply to demand	Sets the stock to position

Inventory optimization sits downstream of demand planning and upstream of replenishment, and is bought three ways: as a best-of-breed specialist, often the deepest on multi-echelon optimization; as a module inside a broad planning suite; or as a capability inside an ERP system. This guide is narrower than the planning-suite guide by design, focused on the inventory question rather than the end-to-end platform.

3. The inventory optimization market in 2026

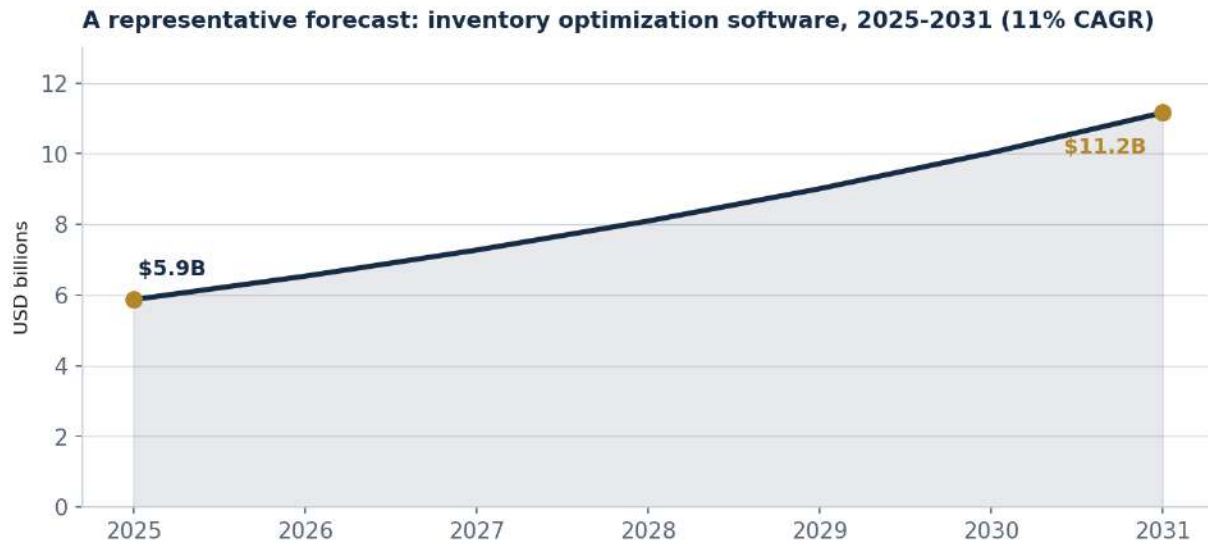
Inventory optimization is one of the more loosely defined markets in planning technology, and the published numbers vary by several times. The most important habit a buyer can adopt is to check the definition: broad inventory optimization software is larger than dedicated optimization tools, which are larger than multi-echelon optimization specifically, and all of them overlap the larger supply chain planning and demand planning markets. Treat the figures below as directional.



Source: Supply Chain Research analysis of published estimates, 2024-2025. Broad inventory-management software is larger still and is sized as a separate category.

Figure 1. Published 2024-2025 estimates by category definition. The figures overlap the broader planning and demand planning markets, so guard against double-counting.

Category and source	Size	Forecast	CAGR
Inventory optimization (broad), DataIntelco	\$8.7B (2025)	\$18.2B / 2033	9.8%
Inventory optimization, Coherent	\$5.87B (2025)	\$12.42B / 2032	11.3%
Inventory optimization, Verified	\$2.73B (2024)	\$4.98B / 2031	8.0%
Multi-echelon (MEIO), DataIntelco	\$1.92B (2024)	\$5.31B / 2033	11.8%
Multi-echelon (MEIO), MarketIntelco	\$1.6B (2024)	\$5.2B / 2033	14.2%



Source: Coherent Market Insights, 2025 (mid-range of the field). MEIO sub-segments grow faster, nearer 12-14%, from a smaller base.

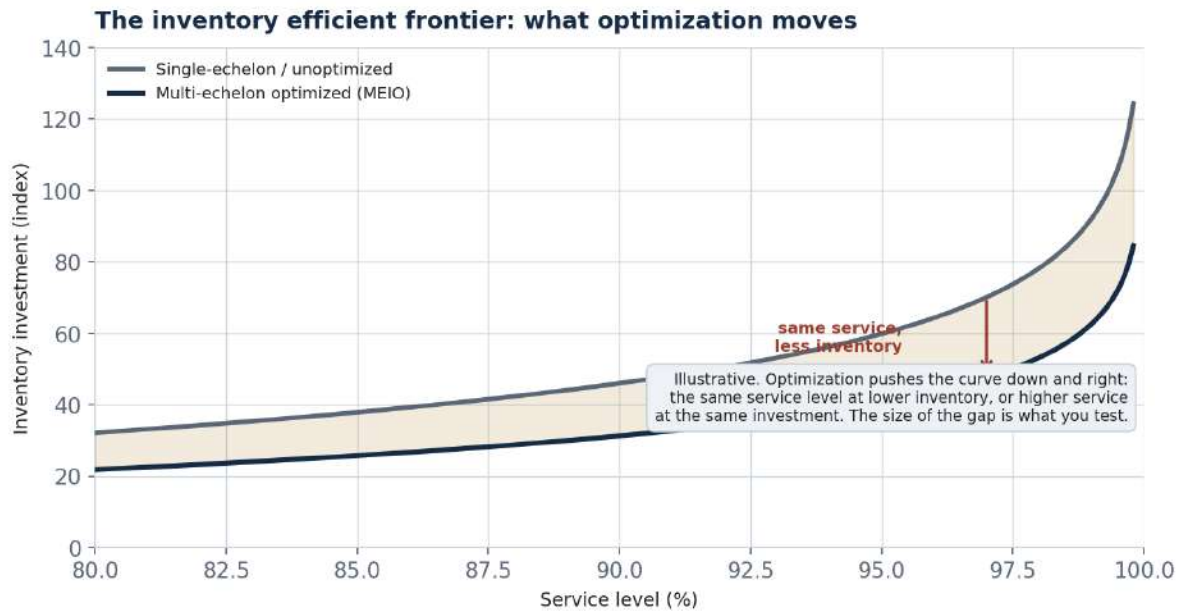
Figure 2. A representative trajectory for inventory optimization software at about 11% CAGR (Coherent Market Insights).

Why the estimates diverge

The spread is a definition problem. The broadest figures count dedicated optimization tools widely; the narrowest count only multi-echelon optimization. Separately, broad inventory management software, the transactional tracking systems, is a much larger and different category that should not be conflated with optimization. All of the optimization figures overlap the supply chain planning and demand planning markets, which raises a real double-counting risk if a buyer adds them together. North America is the largest region at roughly 36 to 39 percent, cloud deployment dominates at about 61 percent, retail and e-commerce is the largest vertical, and healthcare and pharma are among the fastest-growing. For planning, the mid-range optimization figures are the most consistent baseline for a dedicated purchase.

What is driving demand

Demand is pulled by the working-capital pressure that follows every disruption, by the resilience lessons of recent supply shocks, and by the promise of AI and probabilistic methods to hold less stock at the same service level. Boards that once treated inventory as an operational detail now treat it as a balance-sheet priority. That pressure also drives a great deal of marketing, which makes a clear-eyed view of what optimization delivers, and what depends on your own data and network, the most useful thing a buyer can bring.



Conceptual illustration by Supply Chain Research. The curve shape is schematic; the realized gap depends on demand variability, lead times, and network structure.

Figure 3. The inventory efficient frontier (illustrative). Optimization moves the curve down and to the right; the size of the gap on your own network is what a pilot tests.

4. The vendor landscape

The inventory optimization market is well covered by analysts, but as part of the broader planning category rather than on its own. We group vendors into four tiers by what they do best, not by size. No vendor leads every tier, and the same names recur across the planning quadrants because inventory optimization is rarely sold entirely alone.

What the analysts say

Like demand planning, inventory optimization is covered by analysts as part of supply chain planning, not as a standalone category. The essentials:

- **The Magic Quadrant for Supply Chain Planning Solutions.** Inventory optimization is evaluated within it as a use case, alongside demand and supply planning. The same suite vendors, Blue Yonder, Kinaxis, o9, SAP, OMP, and others, are assessed there.
- **Specialist inventory and service-parts rankings.** Independent analysts have published inventory-optimization and retail replenishment rankings in which ToolsGroup has been named a Leader, and an IDC MarketScope covers spare-parts and MRO planning.
- **No standalone quadrant means references matter more.** With no dedicated inventory-optimization quadrant, verified peer reviews and references of similar network complexity carry more weight in selection.

Inventory optimization landscape, 2026



There is no standalone Gartner Magic Quadrant for inventory optimization; it is evaluated within the Magic Quadrant for Supply Chain Planning Solutions. SCR's directional interpretation, not analyst coordinates.

Figure 4. Supply Chain Research's directional map. Inventory optimization is evaluated within the planning quadrant; these positions are our interpretation, not analyst coordinates.

Best-of-breed inventory and MEIO specialists

These vendors lead on optimization depth rather than breadth. ToolsGroup is among the best known for probabilistic forecasting and multi-echelon inventory optimization, with a lower entry cost and transparent pricing, and has extended into agentic AI; independent reviewers note its deepest optimization mechanics are not fully documented publicly. GAINSystems and Smart Software bring strong optimization and demand-and-inventory science. Slimstock serves the European mid-market with Slim4, and Netstock targets smaller companies with cloud inventory and replenishment. Strengths: optimization depth, faster deployment, and mid-market fit. Limitations: narrower end-to-end planning than the suites.

Planning suites with strong inventory optimization

These vendors deliver inventory optimization as one capability in an end-to-end planning platform, and suit companies buying a broader transformation. Blue Yonder, Kinaxis, o9 Solutions, SAP IBP, RELEX, and Logility all carry inventory optimization within their suites, with SAP having added an inventory optimization capability inside its cloud ERP. Strengths: end-to-end scope and enterprise references. Limitations: cost, configuration complexity, and the risk of buying more platform than the inventory problem requires.

Service-parts and ERP-embedded options

Two further groups complete the picture. Service-parts inventory specialists, Synchron, Baxter Planning, and PTC Servigistics, optimize spare-parts and after-market inventory, a distinct problem with intermittent demand and high service stakes. And ERP-embedded inventory optimization, inside SAP, Oracle, Microsoft Dynamics, and NetSuite, is the simplest path for companies standardized on that ERP, trading optimization depth for a single platform and one integration.

Vendor summary

Vendor	Tier	Best fit	Notes
ToolsGroup	Best-of-breed	Probabilistic MEIO	Accel-KKR; agentic AI roadmap
GAINSystems / Smart	Best-of-breed	Optimization science	Strong demand and inventory math
Slimstock / Netstock	Mid-market	SME inventory and replenishment	Fast deployment, lower cost
Blue Yonder / Kinaxis / o9	Planning suite	End-to-end planning	Inventory as one suite module
SAP IBP / RELEX / Logility	Planning suite	Suite-standardized firms	Inventory within the platform
Synchron / Baxter	Service parts	Spare-parts inventory	Intermittent-demand specialists
PTC Servigistics	Service parts	After-market service	High-stakes parts availability
SAP / Oracle / Microsoft	ERP-embedded	ERP-standardized firms	Simplest path; less depth

Positions and notes are Supply Chain Research's interpretation from public information and analyst commentary, current to mid-2026. Ownership and product scope change quickly; verify current details directly with each vendor.

5. How to evaluate an inventory optimization platform

The differentiators in inventory optimization are network fit, multi-echelon capability, and data readiness, more than the base safety-stock calculation. We use five dimensions. Score each vendor against your own network and data maturity.

The five evaluation dimensions

1. **Optimization depth.** Does it offer true multi-echelon and probabilistic optimization, or single-echelon safety-stock calculation dressed up as more?
2. **Network and data fit.** Can it model your real network, echelons, lead times, and demand variability, and is your data clean enough to feed it? Data quality is the single biggest determinant of success.
3. **Scope fit.** Decide between a best-of-breed specialist, a planning-suite module, and an ERP-embedded option, matched to whether you are buying inventory optimization alone or as part of a wider program.
4. **Integration.** How cleanly does it connect to your ERP, demand planning, and replenishment, and how does it push policies back into execution?
5. **Usability and viability.** Assess planner experience, the explainability of its recommendations, and the vendor's stability and roadmap in a consolidating market.

Making the decision

Match the tier to your situation. Companies with complex multi-echelon networks and a real working-capital prize reward the best-of-breed specialists such as ToolsGroup, GAINSystems, and Smart Software. Mid-market companies reward lighter tools such as Slimstock and Netstock. Service-parts businesses should weigh the spare-parts specialists, and firms buying a broader planning transformation should weigh the suite modules. Then run a proof of concept on your own data.

A selection process that works

6. Define your network: echelons, locations, SKU count, demand patterns, and data maturity.
7. Match that profile to a tier, and shortlist within it rather than across all four.
8. Run a proof of concept on your own network, measuring inventory and service level against today.
9. Test ERP, demand planning, and replenishment integration early, with real data.
10. Put planners on the tool and weight explainability and adoption heavily.

6. Cost and pricing

Inventory optimization pricing scales with users, SKU and location count, and the modules selected, and the gap between mid-market and enterprise is wide. The models you will encounter:

Pricing model	Typical basis	Notes
Subscription	Per user or platform	Mid-market tools are inexpensive to start
By SKU or location	Usage-based	Scales with catalog and network size
Module-based	Per capability	MEIO and service-parts priced apart
Enterprise license	Custom / gated	Best-of-breed and suites quote on scope
Implementation and data prep	Project fee	Often the largest line item

What drives the number

Network complexity, SKU and location count, and the depth of optimization are the main cost drivers, but the largest and most underestimated cost is data preparation and integration. Master-data cleanup, lead-time accuracy, and stable ERP and replenishment connections frequently cost more and take longer than the software itself. Mid-market tools can be deployed quickly and cheaply; enterprise multi-echelon programs are larger, data-intensive efforts. A frequent and costly mistake is over-buying: licensing an enterprise platform for a problem a lighter tool would solve.

Enterprise pricing is typically gated behind a sales process, so published figures should be treated as starting points. Build a proof of concept and a reference check into the buying process to validate both cost and the inventory and service gains the vendor projects.

7. Implementation: where programs succeed or fail

Inventory optimization programs fail in predictable ways, and almost none of the failure modes are about the optimization algorithm. They are about data, scope, and people. The recurring causes:

- **Poor master data.** Inaccurate lead times, inconsistent units of measure, and unclear location hierarchies are the single most common reason these programs stall.
- **Fragile integration.** If the connections to ERP and replenishment are brittle, optimized policies do not reach execution and the value never lands.
- **Over-buying or under-scoping.** Buying an enterprise platform for a simple problem wastes money, while outgrowing a lightweight tool forces a second migration.
- **Low planner trust.** If planners do not understand or trust the recommended policies, they override them and the optimization is wasted.

Data clean lead times and master data are the precondition for any gain	Integration policies must flow into ERP and replenishment to matter	Adoption planners must trust and accept the recommended policies
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Three principles that separate success from failure

Fix the data first. Invest in lead-time accuracy and master-data governance before, not after, selecting a platform; it sets the ceiling on the result.

Right-size the purchase. Match the platform to your network complexity, avoiding both over-buying enterprise capability and under-scoping a tool you will outgrow.

Make the recommendations explainable. Planners adopt policies they understand, so prioritize transparency and trust, because adoption, not the math, releases the working capital.

A phased rollout

Sequence the program to retire risk early. Begin with data readiness and single-echelon optimization on a representative product set, measuring inventory and service against today. Add multi-echelon optimization once the data and trust are in place, and integrate policies into replenishment. Then extend across the network and, where it adds value, pilot agentic, self-adjusting policies. Treating these as sequential stages, rather than a single switch, is what separates a smooth rollout from a stalled one.

8. Trends shaping 2026

AI and dynamic inventory policies

The clearest shift is from static, periodically reviewed inventory policies to AI-driven policies that adjust continuously as demand and supply change. Machine learning is being applied to detect changing demand patterns and update safety stocks without waiting for the next planning cycle, narrowing the gap between policy and reality.

Probabilistic and multi-echelon optimization

Probabilistic methods, treating demand and supply as ranges rather than single numbers, and multi-echelon optimization across the whole network continue to spread from the specialists into the suites. Together they are becoming the expected standard for serious inventory optimization rather than a differentiator.

Autonomous and self-adjusting inventory

The frontier is agentic AI that sets and adjusts inventory policies with less human intervention, recommending and in some cases enacting changes that planners review rather than build. ToolsGroup and others have launched agentic capabilities, though fully autonomous inventory management remains aspirational.

Working capital and resilience

Every recent disruption has pushed inventory up the executive agenda, and the dual mandate, hold less working capital while protecting service and resilience, is now the central business case. Inventory optimization is increasingly framed as a balance-sheet and resilience tool, not only an operational one.

Convergence into broader planning

The strongest structural trend is convergence. Inventory optimization is being absorbed into broader planning and integrated business planning, with the suites embedding it alongside demand and supply planning. For buyers, this means today's inventory purchase should be weighed for how well it fits a wider planning platform tomorrow.

9. Segment-specific guidance

The right approach depends on your network and industry. The table summarizes where each segment usually starts; the prose adds the nuance.

Segment	What matters most	Where to start
Complex multi-echelon network	True MEIO and data fit	ToolsGroup, GAINS, Smart
Mid-market distributor	Fast deploy, lower cost	Slimstock, Netstock
Service-parts business	Intermittent-demand parts	Syncron, Baxter, Servigistics
Suite-standardized enterprise	End-to-end planning	Blue Yonder, Kinaxis, o9, RELEX
ERP-standardized firm	One platform, one integration	SAP, Oracle, Microsoft

Companies with complex multi-echelon networks and a real working-capital prize reward the best-of-breed specialists. **Mid-market distributors** reward lighter, faster tools. **Service-parts businesses** need the intermittent-demand science of the spare-parts specialists. **Suite-standardized enterprises** buying a broader transformation reward the planning suites, and **ERP-standardized firms** should weigh embedded inventory optimization before adding a separate tool. The unifying rule is to match the tier to the network and industry, not to buy more than the operation needs.

10. ROI and the business case

The business case for inventory optimization is straightforward in structure and easy to overstate in practice. The levers are inventory reduction, service-level improvement, reduced stockouts and obsolescence, and the working capital those release. The discipline is refusing to bank the vendor's headline percentage before you have proven it on your own network.

Inventory optimization releases working capital by removing duplicated buffers	Service better positioning lifts fill rates and cuts stockouts at once	Obsolescence holding less of the wrong stock reduces markdowns and write-offs
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Where the value comes from

Most of the return is a working-capital story. Multi-echelon optimization removes the duplicated safety stock that single-echelon methods leave at every node, releasing cash without cutting service, the move illustrated in Figure 3. Better positioning simultaneously raises fill rates and reduces stockouts, and holding less of the wrong stock cuts obsolescence and markdowns. Vendors and analysts cite inventory reductions in the double digits and, in one analyst-cited and name-withheld case, a North American auto-parts distributor that cut network stock by roughly 19 percent and saved several million dollars in freight through centralization, a figure that is illustrative and not independently audited. The prudent planning assumption is the lower end of any vendor range, with anything above it treated as upside to be earned. Build the case on your own inventory position and service levels, and use vendor figures only to size the opportunity.

11. Frequently asked questions

What is inventory optimization software?

Software that sets how much stock to hold and where, calculating safety stock, reorder points, and order quantities mathematically from demand variability, lead times, and service targets. The most capable systems optimize across a whole multi-echelon network rather than each location in isolation.

What is the difference between single-echelon and multi-echelon optimization?

Single-echelon optimization sets inventory for each location on its own, which tends to over-stock because every node carries its own buffer. Multi-echelon optimization, MEIO, optimizes the network as a whole, positioning stock where it protects service most efficiently and removing duplicated buffers. MEIO is where the largest working-capital gains are found.

How is it different from demand planning?

Demand planning forecasts how much will sell; inventory optimization decides how much stock to hold to meet that demand at a target service level. Inventory optimization consumes the demand forecast and feeds replenishment, and the two are often bought together but are distinct capabilities.

Is there a Gartner Magic Quadrant for inventory optimization?

No. Inventory optimization is evaluated as a use case within the Magic Quadrant for Supply Chain Planning Solutions, not as a standalone category. Specialist rankings and reference checks therefore carry more weight in selection.

Who are the leading vendors?

It depends on the tier. Best-of-breed specialists include ToolsGroup, GAINSystems, and Smart Software; mid-market tools include Slimstock and Netstock; service-parts specialists include Synchron, Baxter Planning, and PTC Servigistics; and the planning suites such as Blue Yonder, Kinaxis, o9, SAP IBP, and RELEX carry inventory optimization within their platforms.

How big is the market?

It depends on the definition. Broad inventory optimization software is sized near \$6B to \$9B in 2025, while multi-echelon optimization specifically is nearer \$1.5B. All overlap the broader supply chain planning and demand planning markets, so the figures should not be added together.

What is the most common reason these projects fail?

Poor master data, especially inaccurate lead times and inconsistent units of measure, followed by fragile ERP integration and low planner trust. Almost none of the common failures are about the optimization algorithm. Fixing the data first is the most important step.

What does it cost?

Mid-market tools can be inexpensive to start and priced per user or by SKU and location. Enterprise multi-echelon platforms quote on scope, and the largest and most underestimated cost is usually data preparation and integration, not the software license.

How is AI changing inventory optimization?

AI and machine learning are driving dynamic, continuously adjusting inventory policies, and agentic AI is beginning to set and adjust policies with less human input. Fully autonomous inventory management remains aspirational, but the direction is clear.

Should I buy best-of-breed, a suite, or an ERP module?

If you have a complex multi-echelon network and a real working-capital prize, best-of-breed specialists are usually deepest. If you are buying a broader planning transformation, a suite module fits. If you are standardized on a

single ERP, weigh its embedded capability first. Network complexity and whether this is a standalone or suite decision should drive the choice.

12. Recommendations

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

- 11. Decide standalone or suite first.** Determine whether you are buying inventory optimization alone or as part of a wider planning program, because that shapes the whole decision.
- 12. Demand true multi-echelon capability.** Distinguish real MEIO and probabilistic optimization from single-echelon safety-stock calculation, because that is where the working-capital prize is.
- 13. Fix the data before you buy.** Invest in lead-time accuracy and master-data governance first, because it sets the ceiling on any result regardless of the platform.
- 14. Match the tier to your network.** Best-of-breed specialists (ToolsGroup, GAINS, Smart) for complex networks, mid-market tools (Slimstock, Netstock) for simpler ones, service-parts specialists for after-market, suites for broader programs.
- 15. Right-size the purchase.** Avoid both over-buying enterprise capability you will not use and under-scoping a tool you will outgrow.
- 16. Treat ROI claims as a ceiling.** Run a proof of concept on your own network, baseline your current inventory and service, and prove the working-capital release before scaling.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, the Gartner Magic Quadrant for Supply Chain Planning Solutions, specialist inventory rankings, vendor disclosures, and trade reporting, current to mid-2026. Supply Chain Research is independent and accepts no payment from the vendors covered.
- Market-size figures diverge by several times by definition: broad inventory optimization software near \$6B to \$9B, and multi-echelon optimization specifically near \$1.5B, all of which overlap the broader planning and demand planning markets. We present a range and separate the definitions rather than adding them together.
- There is no standalone inventory-optimization Magic Quadrant. Inventory optimization is evaluated within the planning quadrant, and the landscape map in Figure 4 is our directional interpretation, not analyst coordinates.
- The efficient frontier in Figure 3 is a conceptual illustration; its shape is schematic, and the realized gap depends on demand variability, lead times, and network structure. Inventory and ROI figures are vendor-stated or analyst-cited and treated as a ceiling.
- Vendor ownership and product scope change quickly. Validate current details directly with vendors before any purchasing decision.

14. Sources

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Supply Chain Research is an independent, vendor-neutral research platform for supply chain and IT leaders. We accept no payment from the vendors covered. Figures should be validated against your own requirements before any purchasing decision.