

Market Guide for Real-Time Visibility Providers

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Real-time visibility into orders and shipments is increasing in importance for shippers, 3PLs and their customers. Supply chain leaders can use this research to get an overview of the market, trends and vendors in the real-time visibility platform space.

Key Findings

- Driven by the “Amazon effect,” commercial customers and consumers continue to have increased demands about real-time visibility of their orders and shipments. On the commercial side, we see an increased demand for these solutions in North America and Europe. In Asia, these solutions are starting to become of age, although lag behind the other two regions.
- A lack of visibility creates internal and external inefficiencies in warehousing, fleet, yard and transportation operations both inbound and outbound, and leads to an increase in transportation costs (e.g., carrier waiting times, customer fines).
- With the shortage of carrier capacity, shippers that can create efficiencies with increased visibility become the “shipper of choice.” Those that cannot, continue to struggle with securing capacity and with contracted carriers accepting their tenders.
- Real-time visibility providers are enhancing their offerings by adding functions, expanding transportation modes covered, and reaching out to new geographical regions.

Recommendations

Supply chain leaders investing in supply chain and operations technologies, specifically real-time visibility solutions should:

- Identify requirements around transportation visibility by initiating discussions with internal stakeholders and external customers.
- Create efficiencies, based on the benefits noted in this research, during the tight carrier capacity landscape by using real-time visibility.
- Provide real-time transportation visibility for internal and external customers by identifying the best platforms for connecting to carriers. Select vendors based on regional and modal coverage, and how they align to the company’s carrier network.

- Focus on vendors' development roadmaps as they move from single mode to multiple modes of transportation coverage, expand geographical coverage and add operations intelligence capabilities (e.g., advanced analytics or machine learning) as the basis for intelligent decision making.

Market Definition

Real-time transportation visibility platforms (RTTVPs) provide commercial customers and consumers with real-time insights into their orders and shipments once they have left the brand owner's or service provider's warehouse. Such platforms, owned and managed by third-party software vendors, represent a subsegment of the overall end-to-end supply chain visibility market, predominantly — but not solely — addressing the domestic road transportation mode. RTTVPs obtain data through integration (e.g., API, EDI) with carrier systems, direct feeds from telematics (e.g., in-cab or trailer devices) or other devices (e.g., mobile or smartphone).

Market Description

For many years, transportation has struggled with a lack of proper visibility of loads once they left the brand owner's or service provider's warehouse. Commercial customers and consumers continue to have increasing demands around real-time visibility to their orders and shipments (see Note 2). This is driven by the "Amazon effect" and is valid for any organization, regardless of size, geography or industry. It is applicable across all regions with North America and Europe leading the adoption. These solutions began being predominantly focused on domestic road requirements. Visibility is a core part of logistics and transportation technology and plays a complementary function to transportation management, warehouse management, yard management and fleet management.

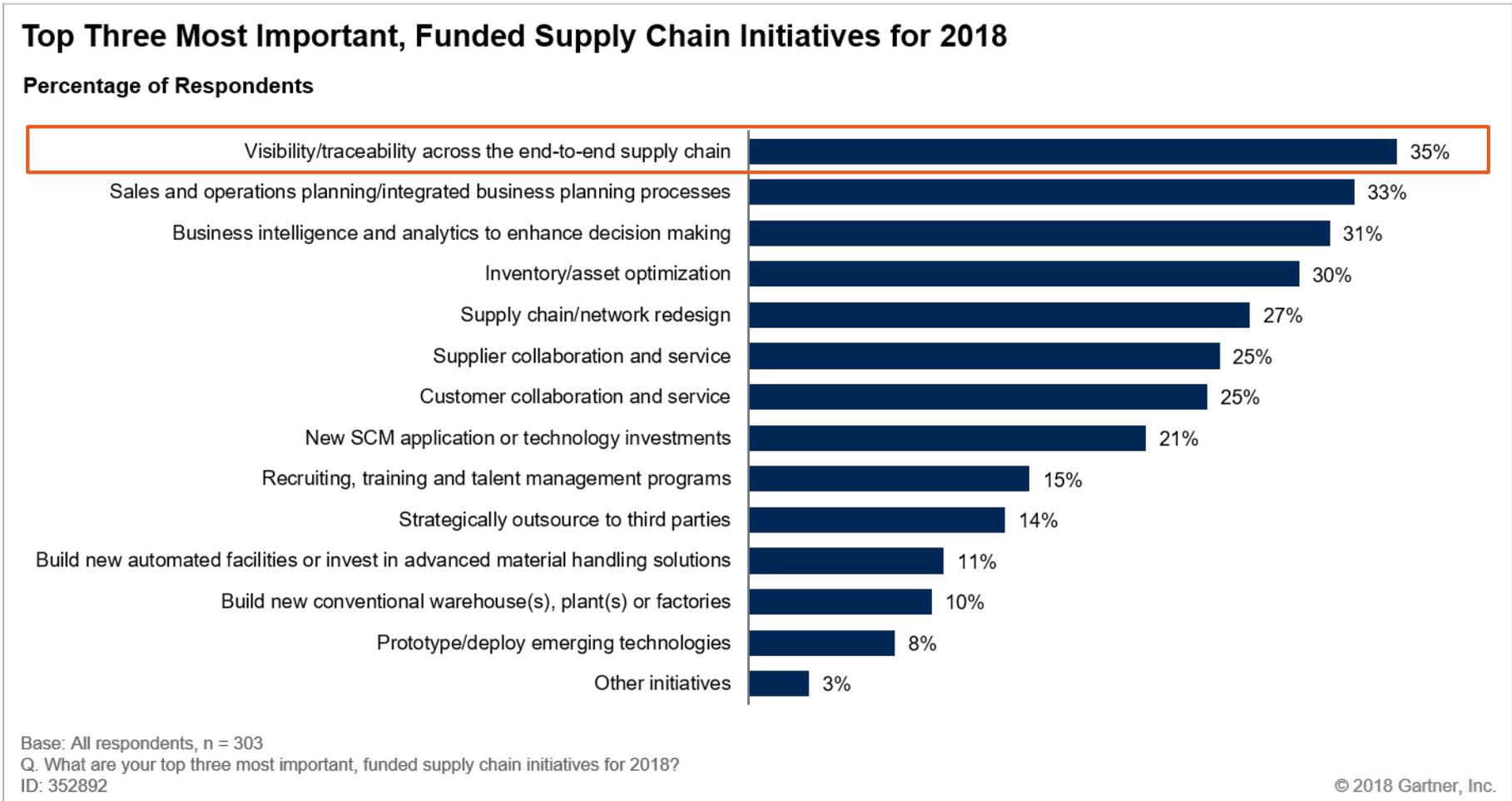
Key features of RTTVPs combine a strong carrier network with real-time tracking of shipments, analytics and reporting as well as integration to core business systems. They provide a multitude of benefits in the areas of customer service, carrier management and transportation processes, enabling higher service levels and/or order fulfillment rates and efficiency gains for all (e.g., brand owners, logistic service providers and carriers). These solutions provide the parties with location and condition monitoring, and provide capabilities such as:

- Real-time tracking
- Status updates
- Exception management
- ETA calculation
- Analytics and reporting
- Business system integration

Market Direction

The transportation management solution market continues to grow rapidly. Providers are continuing to increase functionality and usability, and expand carrier networks, mode and market coverage. This results as a response to customers and brand owners that demand better visibility. According to Gartner's 2017 Supply Chain Technology User Wants and Needs Survey, visibility ranks as the highest priority initiative in supply chain (see Figure 1).

Figure 1. Top Three Most Important, Funded Supply Chain Initiatives for 2018



Source: Gartner (November 2018)

Heritage technology (e.g., EDI and portal) works well for capturing milestone information and creating workflows, but does not provide real-time insights or predictive analytics to allow for the more efficient running of their operations.

Overall **challenges and trends** that the transportation market experiences include:

- Increased demand into real-time insights of orders and shipments to overcome internal and external inefficiencies
- Insights requested from all stakeholders involved in supply chain operations, independent of type, size and geography
- Shortage of transportation capacity or difficulties securing that capacity
- Decreased tender acceptance rates from contracted carriers
- Aside from solution providers, logistic service providers are also developing their own visibility tools and marketing them as differentiating capabilities
- Technology solutions being positioned as competitive differentiators
- The growing last-mile delivery market is impacting need for better visibility
- Continued investment from private equity into this area bringing new vendors to the market and allowing existing vendors to expand their footprints

In addressing those trends, solution providers are enhancing their offerings through:

- Moving from domestic road transportation insights into multimode insights along the extended value chain
- Expanding regional coverage (one region to multiregion)
- Partnering with other types of networks for enhanced data capture (aka “network of networks”)
- Multichannel integration to allow any format or method
- Partnerships with planning and executional transportation systems and fleet management systems (e.g., TMS, VRS, YMS)
- Expansion of capabilities into predictive capacity solutions, dynamic appointment scheduling, advanced analytics and others

Market Analysis

Vendor Proliferation in the U.S. and Europe

About eight years ago, there were only a few vendors in the market with MacroPoint (acquired by Descartes in 2017) leading the way in the U.S. and GateHouse Logistics similarly carving its path in

Europe. In recent years, a growing number of companies specializing in providing real-time carrier information to the shipper and 3PL community have entered the market inspired by electronic logging device (ELD) technology adoption in the trucking industry and customer visibility demands.

The vendors offering these types of solutions can be labeled as third-party, real-time transportation visibility platforms. They provide real-time information on shipments based on interaction with the carriers (via the carrier's back-end systems or the driver). The main focus of the companies described in this research is on over-the-road transportation.

During the research for this Market Guide, Gartner noticed an ever-growing list of vendors focused on this market. The market has grown into a space with dozens of players, most of whom are active in either North America or Europe. In APAC, demand and technology adoption are still lower, but international companies that have started using these solutions in North America and Europe are expanding to this region as well.

However, different regions have different transportation industry characteristics, organization of the carriers (core asset based vs. subcontracted fleets) and technology adoptions. This makes it harder for vendors to expand across regions. At this point of the adoption, there are no true global players, but some vendors have started demonstrating leadership in their key region.

Vendors Expand Solutions Offerings

Solution providers started with road transportation, but as customers are increasingly demanding a single platform for all visibility, vendors have continued to expand their solutions to other modes (rail, ocean, parcel) as well as to other regions. In order for the platforms to work, they need to be successfully connected to carriers that provide information to the shipper or 3PL provider, in a fast and affordable manner. In the past, shippers and 3PL providers have had to rely on carriers sending electronic data interchange messages or manual system updates, or log into the carrier's track-and-trace tools to get visibility to the status of their shipments. These methods no longer fit the shippers' requirements because they don't meet the real-time aspect. Now, solutions don't just provide real-time visibility to the location of a shipment or product, they can also provide real-time information on the condition such as temperature.

Cost Models for Real-Time Transportation Visibility

The most common cost model for these real-time visibility solutions is based on the number of transactions. The shipper or 3PL is typically charged for these costs. There is no charge to the logistics service providers. Vendors charge a fee based on those transactions on a yearly basis. Other charges can include implementation fees, and carrier onboarding and training fees. Some vendors do not charge anything beyond the transaction fee. End users also need to include the cost of their internal resources during implementation to get a complete cost picture. (See "Toolkit: RFP for Real-Time Visibility.") Most contracts are for a duration of three years.

In some cases where a sensor is used (the case of Tive), the charge is based on the cost for the sensor per year and includes all use of the software, cellular charges, training, support, etc.

Potential Benefits From Real-Time Transportation Visibility

These real-time visibility solutions can provide shippers, 3PL providers and carriers a multitude of benefits in the areas of customer service, carrier management and transportation processes, as well as warehouse and yard efficiencies, such as:

Higher Customer Delivery Service

- Proactive action when deviations occur from the plan (e.g., ability to update dock appointments)
- Updated ETAs to customers allowing them to assess whether changes are needed on their side

Shipper/3PL Providers' Efficiencies

- Reduction of costs by shortening detention or waiting times, and/or fines for missing dock appointments (e.g., on-time, in-full [OTIF] penalties)
- Updated ETAs to shippers for better managing their enterprise operations (yard, warehouse, shop floor)
- Improved utilization of warehouse and yard resources
- Real-time visibility provisioning to customers online, rather than having to need customer service representatives
- Reduction of inventory through a reduction in safety stock, based on greater trust in reliability of deliveries
- Creating backhauls through improved alignment of load timing

Carrier Efficiencies

- Increased driving time and reduced detention times due to dynamic and more accurate dock scheduling (tighter windows)
- Costs avoidance as services are mainly free for carriers (versus EDI setup costs and ongoing charges)

Representative Vendors

Vendors included in this Market Guide have customers that are successfully using their products and services. Selections are based on analyst research, Gartner secondary research services and vendor survey responses; however, this is not an exhaustive list or analysis of vendors in this market. The Market Guide has a limit of 20 vendors, but many more vendors were identified in the market with some type of real-time visibility offering (Gartner has identified over 45 vendors in this solution space). Use this perspective as a resource for evaluations, but explore the market further to gauge each vendor's ability to address your unique business problems and technical concerns.

Consider this research as part of your due diligence in conjunction with discussions with Gartner analysts and other resources.

Market Introduction

The vendors in the table below are the relevant vendors in this market space. Relevance in the market is determined by revenue, number of customers, as well as the volume of inquiries and requests that Gartner receives on these vendors and their solutions. These vendors provided detailed surveys, as well as vendor briefings and demos during the Gartner research phase (see Table 1).

Table 1. Representative Vendors in Real-Time Visibility

Vendor Name	HQ	Product Name	Website
Autoplant System India	APAC	Autoplant	https://autoplant.in
BluJay Solutions	EU	MobileSTAR	https://www.blujaysolutions.com
Blume Global	North America	Digital Supply Chain Platform	https://www.blumeglobal.com
Convey	North America	Engage	https://www.getconvey.com
Descartes	North America	Descartes (MacroPoint)	https://www.descartes.com/macropoint
FarEye	APAC	FarEye	https://www.getfareye.com
FourKites	North America	Real-Time Visibility Tracking & Predictive Analytics Platform	https://www.fourkites.com
G7	APAC	G7	https://www.english.g7.com.cn
GateHouse Logistics	EU	ghTrack	https://www.ghtrack.com
nuVizz	North America	nuDeliverIt	https://nuvizz.com
project44	North America	project44 Advanced Visibility	https://project44.com
RateLinx	North America	Radar Track & Trace	https://www.ratelinx.com
Shippeo	EU	Shippeo	https://www.shippeo.com
Sixfold	EU	Sixfold Real-Time Visibility	https://sixfold.com
SupplyStack	EU	SupplyStack	https://www.supplystack.com
Synfioo	EU	Synfioo Integration Solution, OnTime Navigator, Synfioo GPS	https://www.synfioo.com/en
Tive	North America	Tive's Supply Chain Visibility Solution	https://tive.co
TransVoyant	North America	Continuous Decision Intelligence (CDI) Platform Precise Predictive Enterprise (P2E) Application	https://www.transvoyant.com
Trimble (10-4)	North America	10-4 Freight Portal	https://www.10-4.com

Vendor Name	HQ	Product Name	Website
Trucker Tools	North America	Smart Capacity and Load Track	http://www.truckertools.com

Source: Gartner (November 2018)

Vendor Profiles

Autoplant System India

<https://autoplant.in>

Autoplant, headquartered in Mumbai, India, provides a logistics solution that covers the entire supply chain from order placement to payment (freight settlement). It focuses on three broad areas when building the integrated supply chain — in-plant asset automation (e.g., loading points, conveyor belts, and dock and/or loader scheduling), real-time visibility monitoring (e.g., en-route hijacking, tracking driver behavior, giving proactive recommendations on weather, route and risky areas, and arranging backhaul), and a central control center to monitor the whole operation, along with the use of a mobile app and web interface for third parties to get relevant updates.

Autoplant is mainly active in cement, steel, chemicals, cold chain, consumer goods and industrial goods manufacturers, as well as at transportation service providers and e-commerce players.

BluJay Solutions

<https://www.blujaysolutions.com>

BluJay Solutions, headquartered in Manchester, U.K., focuses on various aspects of supply chain, including domestic and international transportation management, supply chain networks, control towers, global trade management, freight forwarding solutions, multicarrier parcel management and visibility. BluJays' strategy is to enable customers to optimize their supply chains within the context of a global trade network (GTN), allowing them to select from a portfolio of core execution applications augmented by value-added capabilities offered within a "service library." BluJay offers the MobileSTAR visibility solution for shippers and logistics service providers. MobileSTAR, BluJay's Control Tower and Transportation Management system (TMS) are all integrated and work together. BluJay has a strong presence in retail, wholesale, consumer packaged goods (CPG), manufacturing, food and beverage, life sciences, pharmaceuticals, and freight forwarder industries.

Blume Global

<https://www.blumeglobal.com>

Blume Global (formerly REZ-1), headquartered in California, U.S., provides value to all the participants in the supply chain, such as shippers, logistics providers and carriers. It offers solutions for asset life cycle management, logistics execution, end-to-end visibility, supply chain optimization, and freight audit and pay to help retailers, manufacturers, CPG companies and others orchestrate

their global supply chain networks. Blume Visibility delivers end-to-end inventory and shipment visibility for proactive planning and issues management. Additionally it provides multimode transport visibility for road, ocean, rail, air, barge, etc., as well as multimode connectivity for real-time tracking for API, EDI, Internet of Things (IoT) and data streaming. Blume is currently used in nearly 100 countries and in 22 languages. Blume has a strong legacy in the logistics and transportation space, but its strategy is to work directly with global shippers to address their visibility, logistics and supply chain optimization.

Convey

<https://www.getconvey.com>

Founded in 2013 and headquartered in Texas, U.S., Convey provides shippers better visibility to make smart decisions and the tools to take action. Convey's goal is to help companies reduce costs, improve visibility and transform transportation into a competitive advantage, serving modes from parcel to freight in final-mile delivery. Convey's Engage product differs from many other real-time visibility solutions in several ways. Engage collects data instantaneously, rather than at a set schedule. In addition, the Engage platform is built to clean, organize and "deduplicate" data from the various order management system (OMS), TMS, warehouse management system (WMS), ERP and carrier data systems. Engage goes beyond providing data and reports, and allows carriers and shippers to collaborate in a single view, with all the joint data. Convey is mainly focused on last-mile delivery, and its primary goal is to manage and improve the customer delivery experience.

Descartes (MacroPoint)

<https://www.descartes.com/macropoint>

Descartes, headquartered in Ontario, Canada, is one of the leading transportation technology vendors. In 2017 Descartes acquired MacroPoint, a North American visibility provider founded in 2011. Descartes MacroPoint offers a global freight visibility platform for shippers, brokers and 3PLs to get real-time visibility. Descartes' patented, automated load monitoring and tracking software provides load location visibility, predictive analytics and an automated communication platform to enable "Manage by Exception" capabilities. Descartes MacroPoint's cloud-based SaaS solution works on any cell and smartphone, with existing in-cab ELD and/or GPS and trailer tracking devices, rail car providers, IoT devices and other modes. As a result, it provides real-time location monitoring and tracking, delivery monitoring, and event notifications to third parties. To date, over 1 million drivers and over 3 million trucks are a part of the MacroPoint network.

FarEye

<https://www.getfareye.com>

FarEye, headquartered in Noida, India, is a digital logistics platform which allows businesses to build logistics applications to provide real-time visibility. FarEye also offers executional capabilities for shippers and 3PLs such as vehicle routing and scheduling, a bidding platform for tenders and benchmarking. FarEye's approach is not to offer standard applications but to build logistics

applications with a simple “Drag&Drop” feature, enabling enterprises to reduce time to build new delivery processes. FarEye Transportation is an IoT-enabled digital logistics platform that provides real-time visibility of all in-transit inventory. FarEye offers digital ecosystems that connect all freight logistics stakeholders on one platform, fostering collaboration and transparency. Their technology is being used by companies in the 3PL, postal, CPG, metal, mining, cement, automotive and retail industries.

FourKites

<https://www.fourkites.com>

FourKites, headquartered in Illinois, U.S., provides cloud-based visibility software solutions. FourKites offers a central access point for shippers, third-party logistics providers and freight brokers for real-time visibility. The solution aggregates the location data generated by ELD, trailer tracking devices and driver mobile phones, and creates predictions, including real-time traffic and weather conditions. The solution integrates with many major transportation management systems used by shippers. The vendor’s mobile driver app, CarrierLink, helps brokers and owner-operators sync up with real-time load tracking. FourKites also offers predictive analytics to reduce deadhead miles, loading and unloading times, and driver’s waiting time, in addition to predictive capacity management. 4Q18 FourKites will also release its dynamic appointment scheduling and facility manager tools. FourKites is mainly active in the CPG, chemicals, manufacturing, paper and packaging, pharmaceuticals, retail, and 3PL industries.

G7

<https://www.english.g7.com.cn>

G7, founded in 2010 and headquartered in Beijing, China, is a leading provider of telematics solutions in China. Besides telematics the vendor also offers visibility solutions, as G7 controls such a large part of the Chinese transportation industry. The G7 platform serves more than 50,000 customers, and its total number of connected vehicles exceeds 800,000. The vendor provides telematics and safety solutions for fleets ranging from two to 60,000 vehicles. With a core focus on Asia, G7 has coverage in 1,000 cities and has 600 dedicated technicians. G7 is not actively pursuing globalization right now but does support existing customers and partners in their adjacent markets. G7’s solutions cover express logistics, e-commerce, hazardous chemicals transportation, cold chain logistics, automotive logistics, bulk transportation, urban distribution, cargo owners and other logistics fleets.

GateHouse Logistics

<https://gatehouse.dk/logistics>

GateHouse Logistics is part of the GateHouse Group, headquartered in Norresundby, Denmark, and was formed in 1992. GateHouse originally focused on tracking logistics in the maritime world. ghTrack is the visibility service focused on domestic FTL transportation which was the first visibility service in Europe. It offers General Data Protection Regulation (GDPR) compliant services to shippers, 3PLs and other supply chain data systems including TMS and collaboration solutions, and

has the largest number of telematics vendors connected globally (over 530). It announced a partnership with project44 in October of 2018 to deliver comprehensive logistics visibility across North America and Europe. GateHouse Logistics offers carriers free onboarding and allows the carriers to track information on routes they share through ghTrack for free. ghTrack is the preferred platform for some of the largest shippers and carriers in Europe, and spans multiple industries such as e-commerce, retail, chemical, 3PL and automotive.

nuVizz

<https://nuvizz.com>

nuVizz, headquartered in Georgia, U.S., offers two solutions — nuDeliverIt and WellRyde. nuDeliverIt is a transportation and final-mile delivery planning, execution and network visibility platform. It's a multitenant SaaS platform that connects shippers, brokers and/or 3PLs, freight forwarders, carriers, agents, drivers, and end customers leveraging the same information and real-time visibility. The platform has a portal-based planning (e.g., final-mile route optimization, appointment scheduling, dispatch, reporting, dashboard, visibility, exception management) component and a mobile app (iOS and Android) that helps drivers in the field capture transportation and delivery execution information. nuVizz is mainly active in the CPG, 3PL, carrier, agrochemical and healthcare industries.

project44

<https://project44.com>

Project44, headquartered in Illinois, U.S., offers a unique approach to visibility. Their core business started focused on connecting carriers to shippers and third-party logistics firms. The vendor uses API connectivity to replace more outdated mechanisms like EDI, rate bureaus, FTP, spreadsheets, website scraping and manual processes. Project44's advanced visibility platform includes a large global, multimodal capacity provider network, quote-to-invoice automation and connectivity, and extensive data normalization, cleansing and data stitching capabilities. As a result, project44 can provide accurate and real-time information to keep shippers and their customers updated on vital transportation information across modes. An exclusive partnership with GateHouse Logistics was announced in October of 2018. This is the first partnership in the real-time visibility space and links project44 with the largest real-time visibility provider in Europe. Project44 focuses mainly on retailers, distributors, manufacturers and 3PLs.

RateLinx

<https://www.ratelinx.com>

RateLinx, headquartered in Wisconsin, U.S., has been in business since 2002. It focuses on creating customized integrated shipping and logistics management software, TMS, and freight invoice management solutions. RateLinx offers a multicarrier, multimodal, multilocation TMS, as well as visibility, advanced analytics, and integrated data services. RateLinx differentiated approach comes from the focus on data cleansing as part of its integrated data services to ensure that the data is accurate. Also, the RateLinx solution integrates the order information (and PO), shipment

information, invoice information, and track and trace information. This provides the customer with the financial impact of the service they are receiving, instead of just the service perspective with no link to the cost of the service. RateLinx has a strong presence in retail, wholesale distribution and utilities.

Shippeo

<https://www.shippeo.com/en>

Shippeo, headquartered in Paris, France, with offices in Germany, Netherlands, U.K., Spain and Italy, is a Pan-European company founded in 2014. Shippeo's goal is to create effective and transparent collaboration between shippers, 3PLs and carriers to improve the global performance of all supply chain actors. Shippeo provides shippers, carriers and customers instant access to predictive and real-time information of all their deliveries. Carrier integration is accomplished through truck telematics, TMS and/or dispatching systems, mobile applications, or IoT devices. Automated notifications to any of the above parties can also be obtained via the portal, email or SMS. In addition, a single-order URL link can be easily shared with anyone else to access all information about a delivery. Shippeo has over 30 large enterprise shippers using their solution and over 68,000 carriers connected. Shippeo is mainly active in the retail, CPG, automotive and construction industries.

Sixfold

<https://sixfold.com>

Sixfold, headquartered in Ulm, Germany, was founded in 2017 through the investment from TPG and the acquisition of Palleter, a marketplace that matched loads with trucks to carry them out (based on real-time monitoring and prediction). Palleter had built significant momentum in the Baltics, with most Baltic carriers using their services. Sixfold keeps shippers continuously informed about real-time location, ETA and shipment status, including potential delays or other problems that require attention. Through their partnership with Transporeon Group's Transporeon, Sixfold has access to over 70,000 carriers that are already providing visibility to close to 4 million loads in various ways. Combining access to these carriers and the demand of over 1,000 blue-chip shippers, Sixfold can build a network covering most of the European road transportation activities to provide visibility services and beyond.

SupplyStack

<https://www.supplystack.com/>

SupplyStack (formerly Slickss), headquartered in Antwerp, Belgium, has been offering its TMS since 2013. SupplyStack started in the automotive industry as a visibility solution and from there developed their TMS. The SupplyStack TMS is a transport management solution that enables collaborative logistics. The TMS supports transportation workflows and enables shippers to book freight from carriers, communicate with suppliers and extend visibility toward customers. The TMS manages everything from order creation to billing on a single platform for all transportation modes, with a strong focus on visibility. SupplyStack has around 20 customers, mainly in Europe followed

by North America and Asia. It has customers in 3PL, consumer products and industrial verticals as well as a variety of other industries.

Synfioo

<https://www.synfioo.com/en>

Synfioo, headquartered in Potsdam, Germany, was founded in 2015 with the goal of providing an ETA-management platform that enables intermodal real-time supply chain monitoring, that dynamically calculates the estimated time of arrival (ETA). The concept for Synfioo's services has been developed and tested since 2012, at the University of Potsdam in the EU-funded "GET Service" project in cooperation with renowned partners from the industry and academia. Using artificial intelligence and self-learning algorithms, the software predicts the arrival time of intermodal transports while considering disruptive factors such as traffic jams, border controls, strikes or bad weather. Synfioo was part of the SAP IoT Startup Accelerator through which it gained access to the SAP ecosystem. Recently, Synfioo has been integrated as the first partner on the platform of RIO. RIO is a brand of TRATON (former Volkswagen Truck and Bus and new holding toward TRATON's IPO in 2019). RIO's goal is to become the leading platform/information transportation/global logistics hub. Synfioo is active in Europe in the Logistics, 3PL and automotive industries.

Tive

<https://tive.co>

Tive, headquartered in Massachusetts, U.S., was founded in 2015. Tive is a provider of supply chain visibility solutions that give manufacturers and shippers real-time location and condition data from across their supply chain. Tive has developed a proprietary multi-sensor tracker with a battery life of over a year, as well as a cloud-based software platform that enables real-time visibility into shipment location and condition. The platform also provides configurable alerts for temperature and humidity excursions, changes in light exposure, shock events, and more, as well as advanced reporting and analytics. Customers put the trackers directly on their shipments, and the data is transmitted to the cloud via the cellular network. For ocean shipments, Tive offers integration with vessel tracking data sources to display the ship's location in the ocean. Tive's solution can be used with shipments travelling in any kind of assets, since Tive tracks individual shipments — not the truck. Tive works with their customers on a subscription basis, charging a monthly or annual fee for the trackers and including unlimited access to the software, cellular connectivity, training, and ongoing customer support.

TransVoyant

<https://www.transvoyant.com>

TransVoyant, headquartered in Virginia, U.S., was founded in 2012. TransVoyant analyzes big data streams with proprietary machine learning algorithms and establishes learned behavior models for carriers, lanes, ports, roads, suppliers and other nodes in the global supply chain. These behavior models, coupled with the continuous analysis of real-time and predicted global events, enables

TransVoyant to predict lead times, variability, disruptions and opportunities, and to initiate prescriptive actions. TransVoyant can also support IoT sensors, unmanned aerial vehicles (UAVs), unmanned ground vehicles (UGVs) and human-powered couriers (e.g., bicycles). TransVoyant also offers proprietary methods to track “things” inside of ocean and air ports and inside physical buildings. TransVoyant mainly focuses on global enterprises and national security customers.

Trimble (10-4)

<https://www.10-4.com>

10-4, headquartered in Colorado, U.S., was founded in 2012. In September of 2017, 10-4 was acquired by Trimble, and as part of Trimble’s transportation solution provides its clients with visibility. Besides offering capabilities for over-the-road transportation, last-mile delivery, parcel and ocean, Trimble’s large footprint in the transportation industry, through TMW Systems and PeopleNet solutions, provides 10-4 with a strong carrier network in North America. Trimble’s visibility reach also extends deeply into the food chain with its HarvestMark product, specializing in food traceability back to the farm. 10-4 has an exclusive partnership with Riskpulse. Riskpulse provides risk analysis from weather, fire, volcanoes, social disturbances and others on a global scale. 10-4 is mainly active in the appliance manufacturing, home consumer goods, beverage production and distribution, grocery producers and distributors, and transportation industries. Beginning in 2019, 10-4 will be rebranded as Trimble Visibility.

Trucker Tools

<http://www.truckertools.com/home>

Trucker Tools, headquartered in Virginia, U.S., provides a carrier relationship management tool mainly focused on brokers and carriers. Trucker Tools’ Smart Capacity provides brokers a solution to eliminate inaccurate, stale truckload capacity information, and compress the booking process to eliminate hours of manual phone calls and emails. Utilizing algorithms and workflows, the platform presents a continually updated view of the latest available trucks in the network, their location and status. The solution allows brokers and/or shippers to build and nurture their relationships with the carriers to eliminate “one-load wonders.” The Load Track solution offers fully automated tracking for truckload, less-than-truckload (LTL) and multistop operations. The solution automatically captures start and stop details without depending on the driver for input. Smart Capacity is used by over 100,000 carriers and owner operators and more than 500,000 truckers.

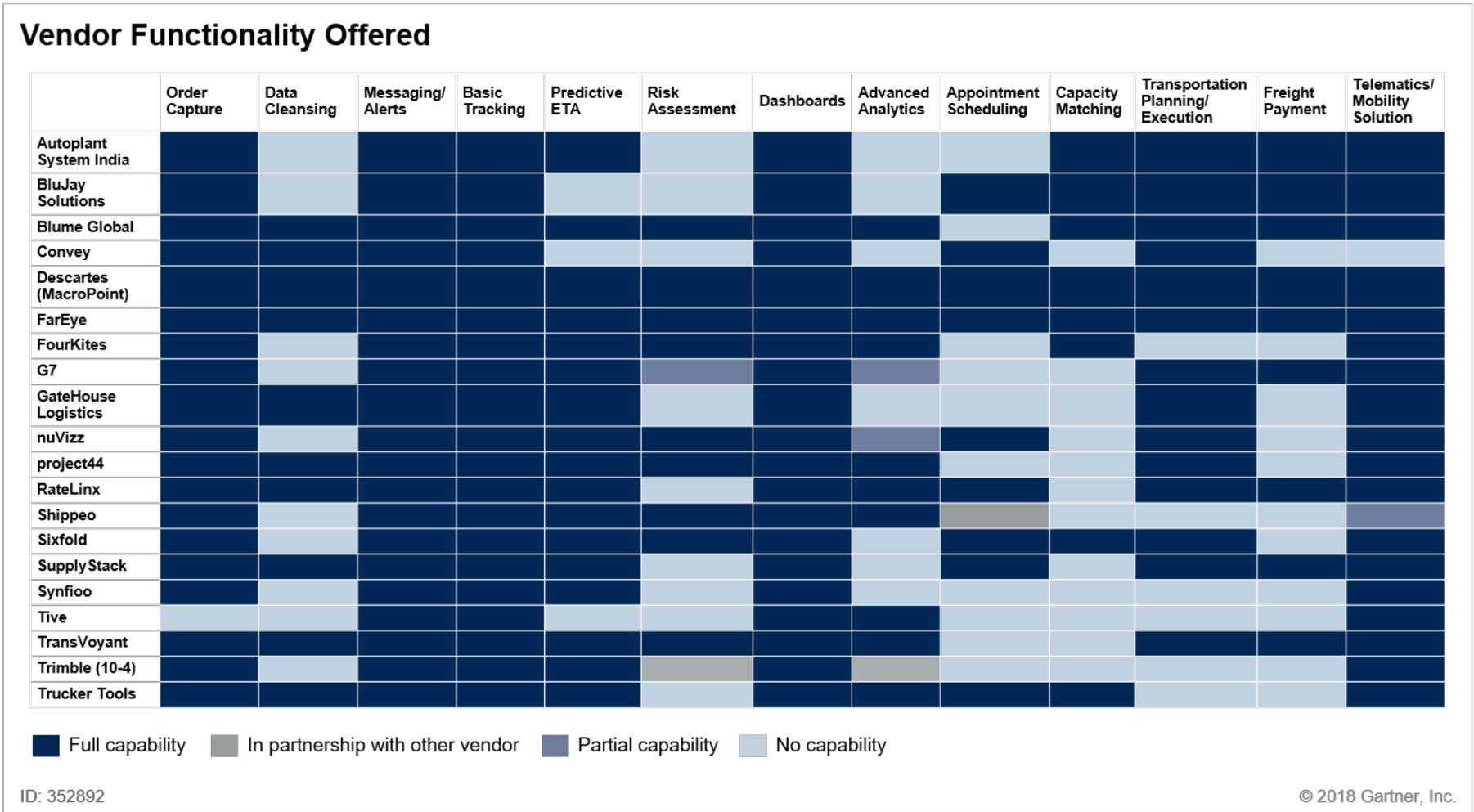
Vendor Tables

Figures 2 to 6 provide further details on vendors’ solutions with regards to:

- Functionality offered
- Modes of transportation covered
- Ways of tracking
- Geographies covered

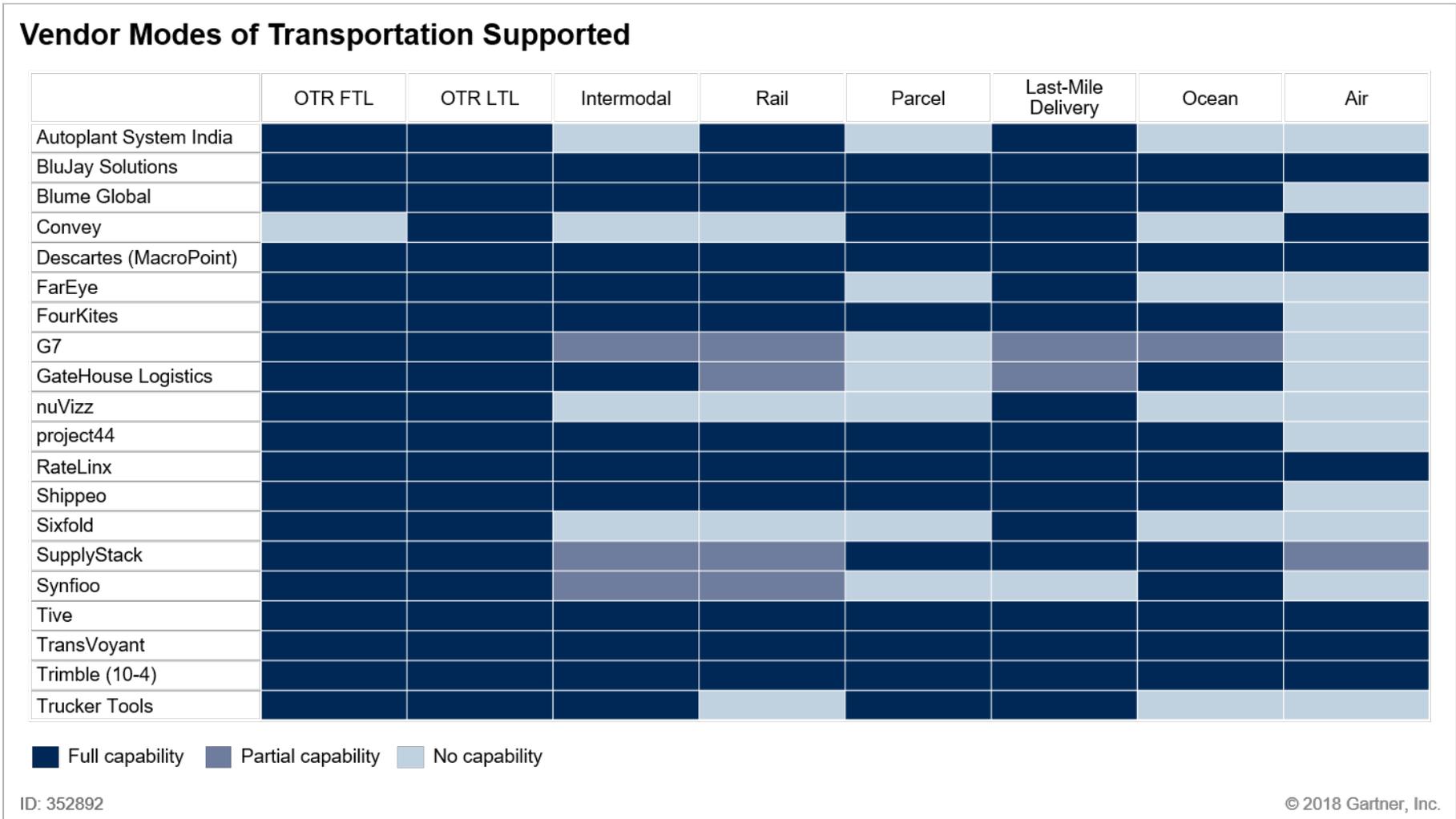
- Partnerships with TMS providers

Figure 2. Vendor Functionality Offered



Source: Gartner (November 2018)

Figure 3. Modes of Transportation Covered



Source: Gartner (November 2018)

Figure 4. Ways of Tracking

Vendor Ways of Tracking

	Cell Phone Triangulation	Smartphone App	Portal	Telematics	Carrier TMS Integration	EDI/XML	API	Flatfile/FTP	Email
Autoplant System India	Full capability	Full capability	No capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability
BluJay Solutions	Full capability	Full capability	Full capability	Full capability	No capability	Full capability	Full capability	Full capability	No capability
Blume Global	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	No capability
Convey	No capability	No capability	Full capability	No capability	No capability	Full capability	Full capability	Full capability	No capability
Descartes (MacroPoint)	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability
FarEye	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	No capability
FourKites	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability
G7	Full capability	Full capability	Full capability	Full capability	No capability	Full capability	Full capability	Full capability	Full capability
GateHouse Logistics	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	No capability
nuVizz	No capability	Full capability	Full capability	No capability	No capability	Full capability	Full capability	Full capability	Full capability
project44	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	No capability
RateLinx	No capability	Full capability	Full capability	Full capability	No capability	Full capability	Full capability	Full capability	No capability
Shippeo	No capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability
Sixfold	No capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	No capability
SupplyStack	No capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability
Synfioo	No capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability
Tive	No capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	No capability
TransVoyant	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability
Trimble (10-4)	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	No capability
Trucker Tools	No capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability	Full capability

Full capability
 No capability

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Source: Gartner (November 2018)

Figure 5. Geographies Covered

Vendor Geography

	North America (U.S., Canada)	Latin America (Mexico, Central America, South America)	Europe	Pacific	Asia	Africa
Autoplant System India	No activity	No activity	No activity	No activity	Main activity	No activity
BluJay Solutions	Main activity	Main activity	Main activity	Main activity	Main activity	Main activity
Blume Global	Main activity	Main activity	Main activity	Main activity	Main activity	Main activity
Convey	Main activity	Some activity	Some activity	No activity	Some activity	No activity
Descartes (MacroPoint)	Main activity	Some activity	Some activity	Some activity	Some activity	No activity
FarEye	Main activity	Main activity	Main activity	No activity	Main activity	No activity
FourKites	Main activity	Some activity	Some activity	No activity	No activity	Some activity
G7	No activity	No activity	No activity	No activity	Main activity	No activity
GateHouse Logistics	Main activity	Some activity	Main activity	No activity	No activity	No activity
nuVizz	Main activity	Some activity	Some activity	No activity	Some activity	No activity
project44	Main activity	Some activity	Main activity	Some activity	Some activity	Some activity
RateLinx	Main activity	Some activity	Some activity	Some activity	Some activity	Some activity
Shippeo	No activity	No activity	Main activity	No activity	No activity	Some activity
Sixfold	Some activity	No activity	Main activity	No activity	No activity	No activity
SupplyStack	Some activity	Some activity	Main activity	No activity	Some activity	Some activity
Synfioo	No activity	No activity	Main activity	No activity	No activity	No activity
Tive	Main activity	Main activity	Main activity	Main activity	Main activity	Main activity
TransVoyant	Main activity	Main activity	Main activity	Main activity	Main activity	Main activity
Trimble (10-4)	Main activity	Some activity	No activity	No activity	No activity	No activity
Trucker Tools	Main activity	Main activity	No activity	No activity	No activity	No activity

Main activity
 Some activity
 No activity

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Source: Gartner (November 2018)

Figure 6. Partnerships With TMSs

Vendor TMS Partnerships

	Oracle	SAP	JDA	Manhattan	Descartes	BluJay Solutions	MercuryGate	Transplace	Alpega (inet, Transwide)	Transporeon	3 Gtms	3T Logistics	Kuebix	Cloud Logistics	TMW	McLeod
Autoplant System India																
BluJay Solutions						■										
Blume Global	■						■								■	
Convey				■			■									
Descartes (MacroPoint)	■	■	■	■	■	■	■	■							■	■
FarEye																
FourKites	■	■	■	■	■	■	■	■			■					■
G7																
GateHouse Logistics	■	■				■			■						■	
nuVizz	■		■	■	■											
project44	■	■	■	■	■	■	■	■	■		■	■		■	■	■
RateLinx																
Shippeo	■	■	■		■	■						■				
Sixfold	■									■						
SupplyStack																
Synfioo		■														
Tive	■															
TransVoyant																
Trimble (10-4)	■		■	■	■		■	■			■				■	■
Trucker Tools							■	■							■	■

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Market Recommendations

Real-time visibility is a key focus for many shippers and 3PLs. Therefore, this market will continue to grow at a rapid rate in the next few years. At the same time, the market is very fragmented from the vendor perspective in the modes and geographies covered, as well as the size of the carrier networks. As a result, end users need to make sure they do enough due diligence to identify the right technology partner to work with on their visibility endeavors.

To be successful in the selection and implementation of these solutions, supply chain leaders should:

- Identify requirements around transportation visibility through internal and external (with customers) discussions. Use this Market Guide to understand the market and the relevant vendors and use “Toolkit: RFP for Real-Time Visibility” as a basis for requirements and to create a comprehensive RFP to send to vendors.
- Use real-time visibility to create efficiencies during the tight carrier capacity landscape. Understand the benefits of the tool as explained in this note and identify which ones are applicable to your business.
- Provide real-time transportation visibility to your internal and external customers by identifying the best platforms for connecting to your carriers. Have discussion with customers and carriers as to how you can provide the best platform for collaboration.
- Select vendors based on regional and modal coverage, as well as how they align to the company’s carrier network. Use this Market Guide to understand the market, the vendors and their capabilities and coverage.

Acronym Key and Glossary Terms

API	Application programming interface
CPG	Consumer packaged goods
EDI	Electronic data interchange
ELD	Electronic logging device
ERP	Enterprise resource planning
LTL	Less than truckload
OMS	Order management system
OTIF	On-time, in-full
TMS	Transportation management system
WMS	Warehouse management system
VRS	Vehicle routing and scheduling
YMS	Yard management system

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

“Magic Quadrant for Transportation Management Systems”

“Hype Cycle for Supply Chain Execution Technologies, 2018”

“Real-Time Transportation Visibility Platforms Provide Transportation Leaders With Supply Chain Efficiencies”

“Research Insights for Supply Chain Visibility: 2017 Update”

“Comprehensive Guide to Supply Chain Visibility: 2018 Update”

“Plan for and Use Supply Chain Visibility Capabilities in Close Alignment With Maturity Stages”

“Toolkit: RFP for Real-Time Visibility”

Evidence

The Gartner 2017 Supply Chain Technology User Wants and Needs Survey was conducted between 30 November 2017 and 21 February 2018. The survey explored the role technology plays in supply chain, how supply chain organizations leverage technology for competitive advantage and their changing views on how best to exploit technology in their supply chain management organizations.

The sample was obtained through Gartner's partnerships with Supply Chain Digest, The Chartered Institute of Logistics and Transport (CILT [U.K.]), and Supply Chain Media. The 303 respondents who completed the web-based survey were qualified according to industry as well as their involvement in decisions regarding supply chain management processes, strategy and supporting technology. The sample mix by region is North America (39%), Europe, the Middle East and Africa (43%), Asia/Pacific region (14%) and South America (3%). Note: Total does not add to 100% due to rounding.

A team of Gartner analysts who follow the IT market developed this annual survey, and Gartner's Research Data and Analytics team reviewed, tested and administered it. Disclaimer: Results do not represent "global" findings or the market as a whole, but reflect sentiment of the respondents and companies surveyed.

Note 1 Representative Vendor Selection

The vendors in this Market Guide are the relevant vendors in the market space for real-time visibility for the main regions of North America, Europe and APAC. The vendors need to have the key components of real-time visibility solutions as defined in this Market Guide. Gartner identified over 45 vendors in this solution space and included the 20 most relevant vendors in this Market Guide. Relevance in the market is determined by revenue, number of customers, as well as the volume of inquiries and requests that Gartner receives on these vendors and their solutions.

Note 2 Supply Chain Visibility Market Segmentation

When it comes to the overarching theme of end-to-end supply chain visibility, we can segment the market into the following domains, each addressing the transportation capabilities to a more or less degree:

- **Multienterprise supply chain business networks:** The widest view with end-to-end process orchestration from the supplier supplier's to the customer customer's
- **Logistics and transportation networks:** Logistics network combined with apps and the community supporting international, multimodal transportation
- **Real-time transportation visibility platforms:** In-transit visibility and collaboration focusing mostly on domestic road
- **Other solutions:** complementary functions like traceability, extended transportation management or specialty tools

Note 3 Gartner's Initial Market Coverage

This Market Guide provides Gartner's initial coverage of the market and focuses on the market definition, rationale for the market and market dynamics.

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