ISG Provider Lens®

Specialty Analytics and AI – Supply Chain

A research report comparing providers' competitive differentiators for decision-makers

Customized report courtesy of:
Tiger Analytics

QUADRANT REPORT | JUNE 2026 | GLOBAL

Report Author: Manav Deep Sachdeva, Saravanan MS

Accelerators, digital twins and agentic AI reshape supply chain agility, resilience and execution

This ISG Provider Lens® Specialty Analytics & AI Services – Supply Chain 2026 study assesses providers enabling analytics- and AI-driven supply chain transformation across planning, orchestration and execution. These providers help improve visibility, strengthen risk management, enhance forecasting accuracy and accelerate informed decision-making across planning, sourcing, manufacturing, logistics, warehousing, inventory, transportation and procurement. The report focuses on providers' ability to enable AI-powered decision engines, real-time insights and proactive exception management that help enterprises build resilient, responsive and adaptive supply chains. It examines how providers support the evolution from traditional process execution toward intelligent orchestration, autonomous decision-making and outcome-driven supply chain operations.

Market Context

The supply chain operating landscape is undergoing a structural shift driven by a convergence of geopolitical, economic, technological and societal forces. Organizations are navigating an increasingly interconnected environment where disruptions are no longer isolated incidents but persistent realities of the business landscape.

Geopolitical realignments, shifting trade policies, regional conflicts and growing economic nationalism are reshaping global trade flows and prompting organizations to rethink sourcing, manufacturing and distribution strategies. At the same time, inflationary pressures, labor shortages and fluctuating demand patterns are increasing the complexity of balancing cost efficiency with operational resilience.

From **visibility** to **autonomy**, **agentic AI** and **GenAI** are redefining supply chain **performance** and **agility**.

Executive Summary

Over the past few years, organizations have used AI-driven control towers and digital twins to assess the impact of disruptions such as Red Sea shipping constraints, congestion at major ports and uncertainty surrounding critical trade routes such as the Strait of Hormuz. These technologies help supply chain teams evaluate alternate sourcing strategies, reroute logistics networks, rebalance inventory positions and assess supplier dependencies in near real time. Similarly, many organizations are deploying AI-enabled supplier intelligence platforms to monitor evolving tariffs, sanctions, trade agreements and regional regulations, allowing procurement teams to identify compliance risks and diversify supplier networks more rapidly.

These developments reflect a broader technological shift. Advances in AI, automation, cloud platforms and real-time connectivity are accelerating the flow of intelligence across supply chain ecosystems. Together with growing sustainability mandates and stakeholder expectations, these forces are challenging traditional supply chain assumptions and driving a transition from networks optimized primarily for efficiency toward systems designed for resilience, adaptability and continuous decision-making.

Enterprise priorities

Enterprises are aligning their investments with a few critical priorities that define the next-generation operating model:

- **Integrated supply chain control towers:** Organizations are prioritizing unified control towers that consolidate data from suppliers, warehouses, fleets and production environments into a single decision layer. These towers enable real-time monitoring, exception management and proactive disruption mitigation.
- **Predictive and prescriptive decision intelligence:** There is a clear shift from descriptive analytics to predicting disruptions and demand fluctuations; prescribing optimal responses across inventory, sourcing and logistics; and simulating trade-offs using scenario models.
- **End-to-end orchestration across functions:** Rather than optimizing isolated functions, enterprises are focusing on orchestrating demand planning, production scheduling, procurement and sourcing, and logistics and fulfillment.
- **Data foundation modernization:** Building scalable, governed data ecosystems that aggregate multi-source data, including IoT, ERP and external feeds, is becoming a prerequisite for AI adoption and value realization.
- **Embedding sustainability into decision models:** Enterprises are integrating ESG metrics, emissions tracking and compliance considerations directly into planning and optimization engines, rather than as an afterthought.

In this changing environment, enterprises are not only investing in advanced technologies but also redesigning the operating models, governance frameworks and partner ecosystems that enable transformation to scale and deliver sustainable business outcomes:

- **From use case pilots to scaled deployments:** Organizations will need to progress beyond isolated AI pilots toward enterprise-wide deployment of repeatable, scalable solutions, often enabled through accelerators and pre-built assets.
- **From functional optimization to ecosystem orchestration:** Competitive advantage will increasingly depend on the ability to orchestrate decisions across internal functions and external partners, rather than optimize individual nodes.
- **From cost efficiency to resilience and agility:** While cost optimization remains important, enterprises will prioritize operational resilience and agility in response to demand fluctuations.
- **From data ownership to data collaboration:** Future supply chains will depend on secure data sharing across ecosystems, including suppliers, logistics partners and distributors, enabling multi-tier visibility and coordinated decision-making.

Provider Dynamics

Across the market, service providers are developing a shared baseline of capabilities to fulfil the evolving enterprise expectations. These include integrating multi-source data integration across supply chain systems, developing control towers and digital command centers, and advancing scenario simulation and risk forecasting capabilities. They are also honing capabilities in AI- and ML-driven forecasting, optimization and anomaly detection as well as cross-functional analytics spanning logistics, manufacturing, procurement and inventory. These capabilities reflect a broader industry convergence toward cognitive supply chain ecosystems, where data flows seamlessly across functions and AI augments decision-making at every stage.

What sets leading providers apart

While foundational capabilities are converging, differentiation is emerging across several dimensions:

Decision-centric architectures: Leading providers are moving from analytics dashboards to decision intelligence layers, which tightly integrate workflows, data and AI models to enable continuous decision orchestration.

Agentic AI and autonomous operations: An emerging differentiator is the use of AI agents that continuously sense disruptions, coordinate actions across supply chain nodes and automate decision execution with human-in-the-loop governance.

Digital twins and simulation-led optimization: Providers are investing in high-fidelity and rich UI-based digital twins for warehouses, networks and operations, enabling scenario testing before execution, mitigating risk for large investments and optimizing throughput and resource allocation in real time.

Industry-specific and contextualized solutions: Mature providers differentiate through deep domain specialization, tailoring solutions for industries such as retail, CPG, manufacturing and pharmaceuticals. A few providers have created their own niche in other verticals such as semiconductors, maritime and aerospace.

Embedded GenAI for decision augmentation: The integration of GenAI into supply chain workflows enables natural language interfaces for decision-making, insight extraction from unstructured documents, as well as context-aware recommendations for operators.

In the table below, ISG has analyzed provider capabilities and categorized them into areas that exhibit strong maturity and those that remain relatively nascent.

Matured AI offerings	Evolving AI offerings
Demand forecasting and planning	End-to-end autonomous execution (Agentic AI)
Inventory optimization (including multi-echelon)	Last-mile and hyperlocal optimization
Predictive maintenance and shop-floor analytics	Integrated ESG and sustainability decisioning
Simulation and scenario planning	Digital twins beyond manufacturing
Functional control towers	Rise of agentic and autonomous systems

How providers are transforming operations

Service providers are redefining innovation through a combination of productization, ecosystem partnerships and advanced AI deployment. Below are some of the provider-led innovation archetypes observed in the market:

- **Accelerator-led delivery models:** Providers are building reusable assets such as pre-configured models, data pipelines and domain-specific frameworks that significantly reduce time-to-value.
- **Human-AI collaboration models:** Providers are embedding governance and human-in-the-loop frameworks to ensure trust, explainability and operational control.
- **Outcome-based engagements:** Providers are increasingly offering outcome-based pricing to clients, especially for agentic AI use cases, to establish market credentials for their developments.

Providers' partnerships and alliances driving scale

Partnerships are a critical enabler of scalability and innovation:

- **Cloud hyperscalers:** Enable scalable data platforms such as Databricks and Snowflake and AI infrastructure
- **Enterprise application providers:** Facilitate integration with ERP, warehouse management systems (WMS) and transportation management systems (TMS) systems
- **Hardware and IoT ecosystems:** Support real-time data capture from shop floors, end-point devices and logistics networks
- **Startup and niche AI firms:** Drive innovation in areas such as digital twins, simulation and agentic AI

Outlook

The path to autonomous, resilient supply chains

The evolution of supply chains over the next 3-5 years will be defined by a gradual but decisive shift from digitally enabled functions to intelligent, autonomous ecosystems. This transition is not a single-step transformation; instead, it is a layered progression in which enterprises will incrementally enhance visibility, embed intelligence and ultimately enable self-optimizing operations.

To reach an autonomous state, enterprises must align around several foundational enablers:

- **Unified, scalable data ecosystems:** Data integration across ERP, IoT, supplier networks and external sources will remain the cornerstone. Investment in data quality, governance and interoperability will influence the success of AI initiatives.
- **Composable and platform-led architectures:** Organizations will increasingly adopt modular platforms that enable rapid assembly and scaling of analytics, AI models, workflows and visualization tools across use cases.
- **AI-augmented decision layers:** Decision intelligence platforms will become the operational backbone of supply chains, embedding predictive, prescriptive and generative capabilities directly into workflows.
- **Human-in-the-loop governance models:** As automation increases, enterprises will maintain governance frameworks to ensure explainability, compliance and risk mitigation, particularly in regulated industries.

Service providers will also play a critical role in enabling supply chain transformation by delivering end-to-end orchestration capabilities that integrate planning and execution layers across the supply chain. The market will also see providers evolving from project-based engagement models into long-term innovation partners embedded more deeply within enterprise operations.

Enterprises that successfully integrate control towers, simulation-driven planning and agentic AI into unified operating models are achieving faster responses to disruptions. They are also improving forecast accuracy and measurable gains in cost efficiency, service levels and supply chain resilience, underscoring the shift from reactive management to intelligent, proactive orchestration.

The study offers insights into the market trends and competitive dynamics of **supply chain analytics and AI service** providers in 2026.

Simplified Illustration Source: ISG 2026

Supply Chain

Definition

The ISG Provider Lens® Specialty Analytics & AI Services – Supply Chain 2026 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the global market

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following one quadrant for services/solutions: Specialty Analytics and AI Services - Supply Chain

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the global market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Supply Chain

Who Should Read This Section

This report is valuable for providers offering Specialty Analytics and AI Services — Supply Chain globally to understand their market position and for enterprises looking to evaluate these providers. The report emphasizes how GenAI and agentic AI are becoming embedded across supply chain planning and operations, enabling real-time forecasting, synchronized decision-making and adaptive execution. It highlights providers' specialized AI orchestration and control towers that equip supply chains with enhanced visibility, scenario simulation and autonomous optimization.

Chief data and AI officers

should read this report to explore providers that can help build data strategies, ensure robust data governance and implement AI and ML solutions. It offers insights to facilitate the integration and accessibility of supply chain data across systems and operationalize AI and ML models to optimize inventory and improve supply chain forecasting.

Supply chain professionals

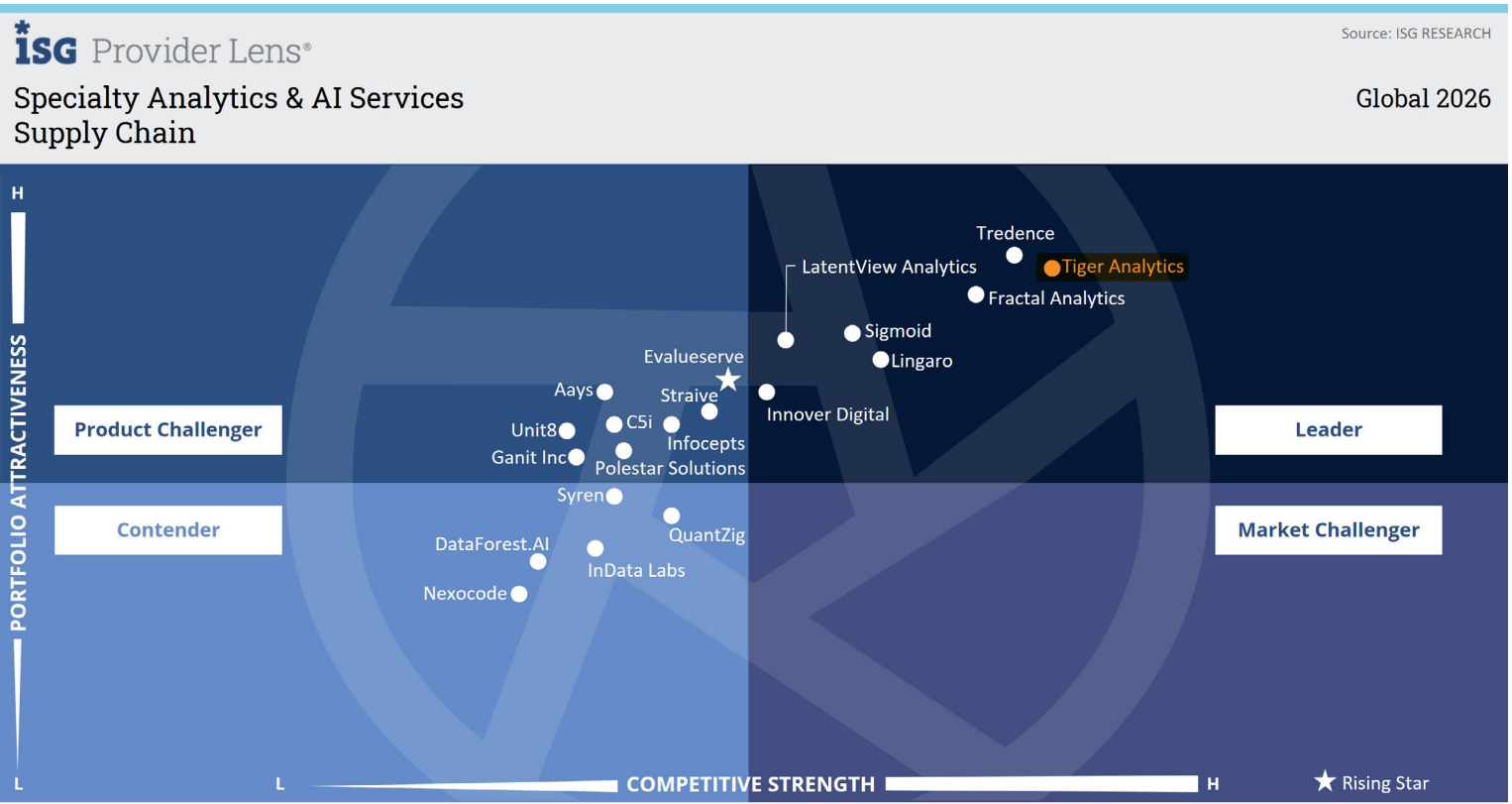
should read this report to understand how providers help enterprises leverage in-depth industry knowledge, best practices and innovative strategies to improve performance of supply chains. It offers insights into provider capabilities for streamlining processes across procurement, production, logistics and distribution and for utilizing data and predictive AI models.

Business managers

should read this report to gain insights into providers that can assist in developing and managing ML solutions, aligning them with business goals and requirements. It focuses on the importance of prioritizing real-time, self-service access to insights in order to enhance operational efficiency, improve logistics routing and mitigate risks through improved visibility of the supply chain ecosystem.

Strategy professionals

should read this report to understand how providers deliver supply chain advisory and implementation services that help enterprises build resilient supply chains. Understanding providers' capabilities enables strategy professionals to design a future-ready, demand-responsive supply chain to drive integrated business planning and to strategically balance trade-offs among inventory cost, service levels and risk exposure.



The market is evolving from fragmented analytics to **integrated decision intelligence,** with leading providers offering **agentic AI, digital twins** and **accelerators.** However, autonomous execution, multi-tier collaboration and sustainability are still maturing.

Manav Deep Sachdeva, Saravanan MS

Definition

In this quadrant, ISG evaluates portfolios of providers offering AI and analytics services that integrate supply chain data and applied AI with industry contexts for clients in the supply chain function. These providers deliver domain-specific solutions to resolve critical supply chain challenges, enabling clients to enhance risk understanding, improve planning and predict future events. This approach centers on a cognitive-led AI ecosystem, integrating data from warehouses, shopfloors and fleets to equip control towers with real-time data and forecasts for informed decision-making and proactive actions. Providers should showcase expertise in facilitating AI-based decision engines across the supply chain ecosystem, covering logistics, transportation, inventory, warehousing, distribution, manufacturing and procurement, empowering business leaders to build resilient supply chains.

Eligibility Criteria

1. Demonstrate capabilities in **synthesizing data** from **multiple sources** across the value chain.
2. Apply **AI and ML models** to generate real-time, **data-driven and actionable insights**.
3. Help enterprises enhance supply chain **adaptability** while minimizing uncertainties and risks.
4. Exhibit **functional expertise in supply chain** and competence in AI to develop predictive solutions to **foresee demand**.
5. **Optimize and reclassify inventory planning and distribution,** streamlining operations.
6. Ability to develop **functional control towers, integrated supply chain control towers and command centers** for operations monitoring and agile decision making.
7. Showcase expertise in developing AI solutions in **shipping, logistics and monitoring,** covering areas such as **network design, fleet analytics, disruption forecasting and floor planning.**
8. Demonstrate proficiency in **distribution, inventory, warehousing, manufacturing and procurement analytics,** covering aspects such as **route optimization, order management, capacity planning and predictive maintenance.**

Leader

"Tiger Analytics differentiates with its unified SCAI platform that combines data foundation, AI-driven insights and agentic execution to enable end-to-end, real-time supply chain decision intelligence and scalable transformation."

Manav Deep Sachdeva, Saravanan MS

Tiger Analytics

Overview

Tiger Analytics, headquartered in California, U.S., operates across more than 10 countries worldwide. The company provides end-to-end services across the data value chain, including data engineering, AI and ML model development, application development and insight generation to drive measurable outcomes. It combines an intelligent data platform, AI-powered decision engines and autonomous agents to deliver modular, scalable solutions for clients across North America, Latin America, EMEA and APAC. Its repeatable intellectual property assets accelerate data modernization, enable faster predictions and automate routine processes.

Strengths

AI-driven insights and decision intelligence: Tiger Analytics enables a shift from reactive reporting to contextual, actionable intelligence through its AI-powered insights ecosystem. By integrating persona-centric dashboards, simulation capabilities and predictive analytics, it delivers real-time role-based insights and proactive alerts. This results in improved forecasting accuracy and traceable, decision-ready intelligence at scale.

Autonomous and agentic supply chain execution: Tiger Analytics offers agentic AI to enable autonomous, real-time supply chain decision-making across planning, sourcing, manufacturing, logistics and maritime freight. Its intelligent agents continuously sense disruptions, orchestrate cross-functional responses and optimize operations through adaptive learning. By embedding human-in-the-loop governance, it enhances resilience, agility and operational efficiency.

Unified data platform: Tiger Analytics' AI-powered supply chain data modelling capabilities accelerate enterprise data modernization, enabling domain-driven data integration, governance and quality. Its cloud-agnostic and scalable architecture delivers a unified, context-aware data foundation that improves decision-making, enhances visibility and drives measurable efficiency gains across supply chain operations.

Caution

Tiger Analytics' agentic capabilities strongly support supply chain planning. However, agent-led solutions for execution, particularly in manufacturing, warehousing and logistics, have relative white spaces. Enterprises should assess their maturity and scalability for end-to-end execution.

ISG Provider Lens®

JUNE, 2026

REPORT: SPECIALTY ANALYTICS AND AI SERVICES — SUPPLY CHAIN