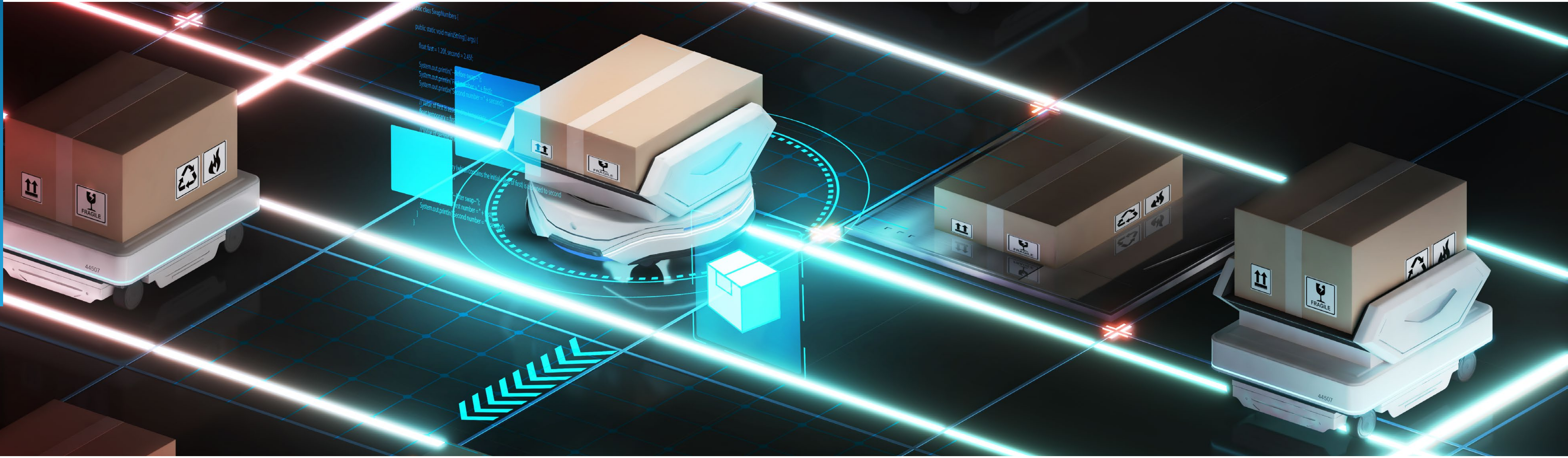
Everest Group®

Everest Group PEAK MATRIX® | Retail and CPG Information Technology

Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment 2023

September 2023: Complimentary Abstract / Table of Contents



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Background of the research

Supply chain IT transformation services have been the focus of investments for retail and Consumer Packaged Goods (CPG) enterprises in the past few years, particularly after the pandemic. The global disruption underscored the urgency of a flexible and resilient supply chain. These transformation services play a pivotal role in optimizing operations, aligning demand and supply, enhancing customer experiences, and facilitating swift responses to market changes.

In the aftermath of the pandemic, these services are crucial for enterprises to navigate uncertainties, ensure continuity, and meet evolving consumer demands while fostering competitiveness and sustainability in an increasingly dynamic and unpredictable landscape.

In this research, we present an assessment of 15 service providers featured on the Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® 2023. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading service providers, client reference checks, and an ongoing analysis of the retail and CPG IT services market.

This report includes the profiles of the following 15 leading service providers featured on the Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix:

- **Leaders:** Accenture, EY, TCS, and Tech Mahindra
- **Major Contenders:** Capgemini, Cognizant, Deloitte, Genpact, HCLTech, Infosys, LTIMindtree, and Wipro
- **Aspirants:** Sonata Software, Visionet Systems, and Zensar

Scope of this report

Geography
Global

Providers
15 service providers

Services
Supply chain IT transformation services in the retail and CPG industry

Overview and abbreviated summary of key messages

This report examines the global 2023 supply chain IT transformation service provider landscape and its impact on the retail and CPG (RCPG) market. It focuses on provider position and growth in the RCPG supply chain market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key supply chain IT transformation service provider profiles. It also identifies the key implications of the research findings for buyers and providers.

Some of the findings in this report, among others, are:

Supply chain IT transformation service provider capability

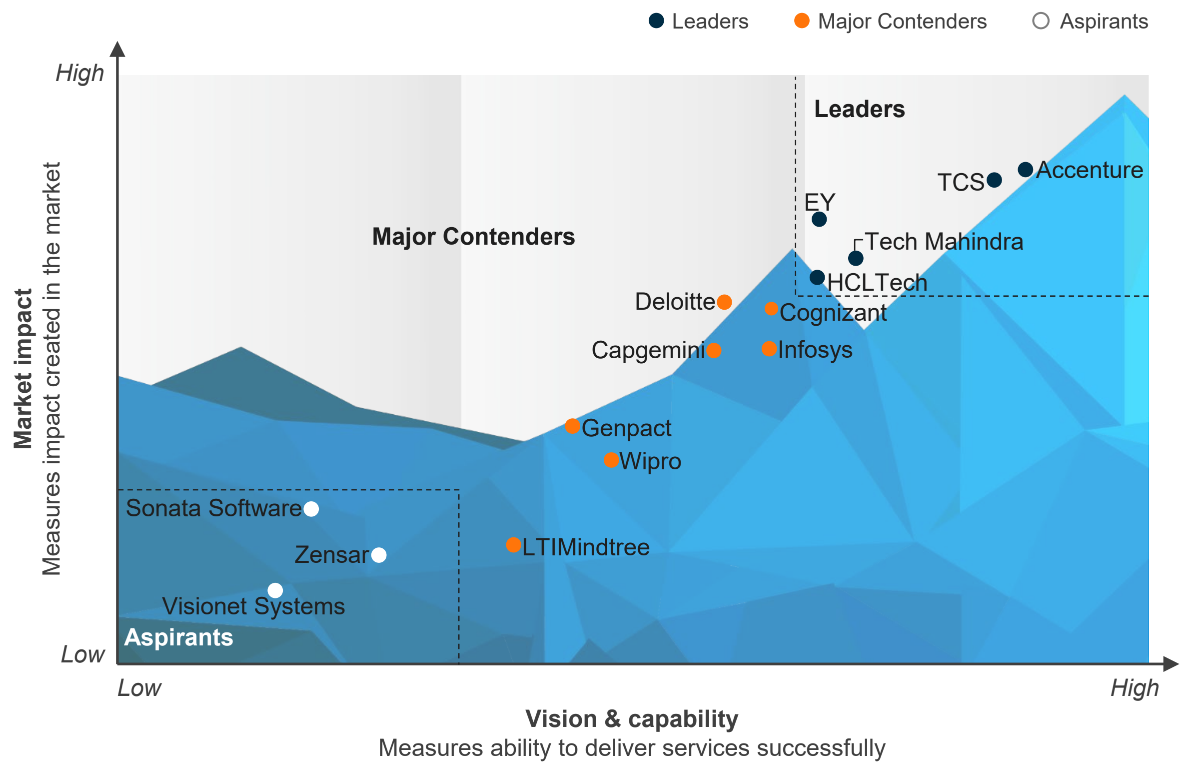
- Supply chain IT transformation service providers in the retail and CPG industry can be classified into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture, EY, HCLTech, TCS and Tech Mahindra are the Leaders in this Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment with several IT service providers emerging as Major Contenders

Service provider characteristics

- Leaders are characterized by their ability to successfully execute complex, multi-product/platform, advisory-led supply chain transformations, underpinned by their strong global delivery network
- Leaders have strong partnerships with big tech firms, such as SAP and Oracle, cloud vendors, such as AWS, Azure, and GCP, and a majority of the supply chain specialists to build and innovate client-specific solutions
- Major contenders are making continued investments in building supply chain-focused proprietary tools, solutions, and accelerators to enhance their service delivery capabilities
- Major contenders have built meaningful capabilities to deliver supply chain transformations; however, their service portfolios are not as balanced and comprehensive as those of Leaders
- Aspirants have good proof points in delivering implementation and/or maintenance of supply chain transformations of low- to medium-complexity for Small and Mid-sized Buyers (SMBs)
- Aspirants are either focused on a certain product(s) or currently have a relatively small supply chain or retail and CPG practice

This study offers 4 distinct chapters providing a deep dive into key aspects of the retail and CPG supply chain IT transformation market; below are three charts to illustrate the depth of the report

Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment[1]

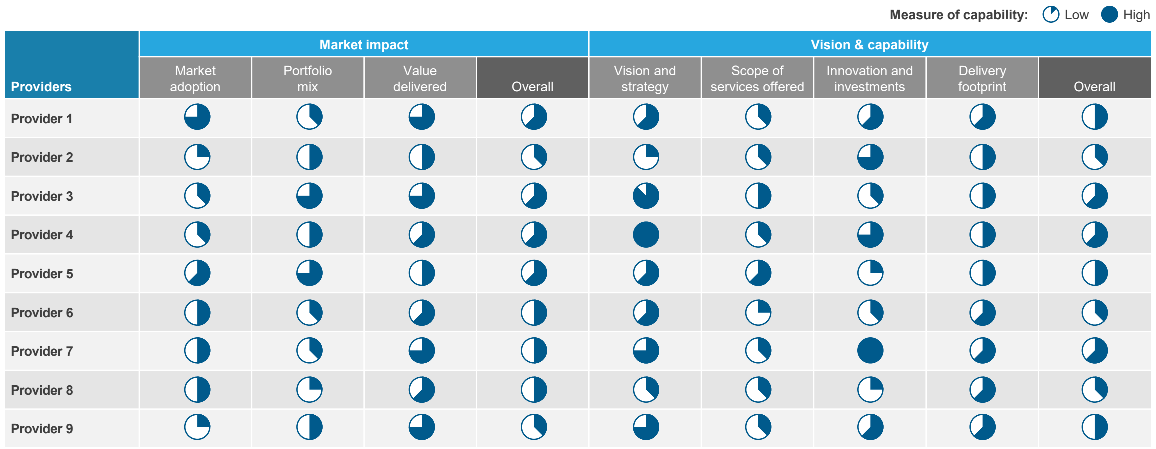


1 Assessments for Accenture, Capgemini, Deloitte, EY, and Infosys excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with retail and CPG buyers

Source: Everest Group (2023)

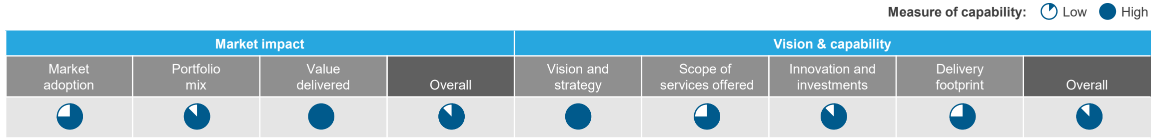
Capability assessment

Illustrative example



Everest Group's remarks on providers

Illustrative example



Strengths

- Provider 1 has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has established a robust partner ecosystem of cloud vendors, technology partners, and supply chain specialists to enhance their delivery of supply chain solutions

Limitations

- Provider 1 has an onshore-/nearshore-heavy delivery model that may prevent it from capturing labor arbitrage opportunities; it can look to further scale resources in offshore locations
- Provider 1 needs to further enhance its focus on advisory services to better position itself as an end-to-end supply chain service provider

Research calendar

Retail and CPG Information Technology

Published | Planned | Current release

Reports title	Release date
Cautious Optimism Amid Disruption – 2023 Key Issues, Enterprise IT Perspective	March 2023
Digital Effectiveness in the Retail Industry | Identifying Retail Leaders in the Connected Commerce Era	June 2023
Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment 2023	**September 2023**
Supply Chain IT Transformation Services for Retail and CPG – Provider Compendium 2023	October 2023
Digital Effectiveness in the Consumer Product Goods Industry | Identifying Food & Beverage Leaders	October 2023
Supply Chain IT Transformation Services for Retail and CPG – State of the Market 2023	Q4 2023
Reimagining the Retail and CPG Value Chain with AI	Q4 2023
Retail Trailblazers: Start-ups Redefining Brick-and-Mortar Retail Operations	Q4 2023
Retail IT Services PEAK Matrix® Assessment 2024	Q1 2024
CPG IT Services PEAK Matrix® Assessment 2024	Q1 2024
Retail IT Services – Provider Compendium 2024	Q1 2024
CPG IT Services – Provider Compendium 2024	Q1 2024
Retail and CPG IT Services – State of the Market 2024	Q1 2024

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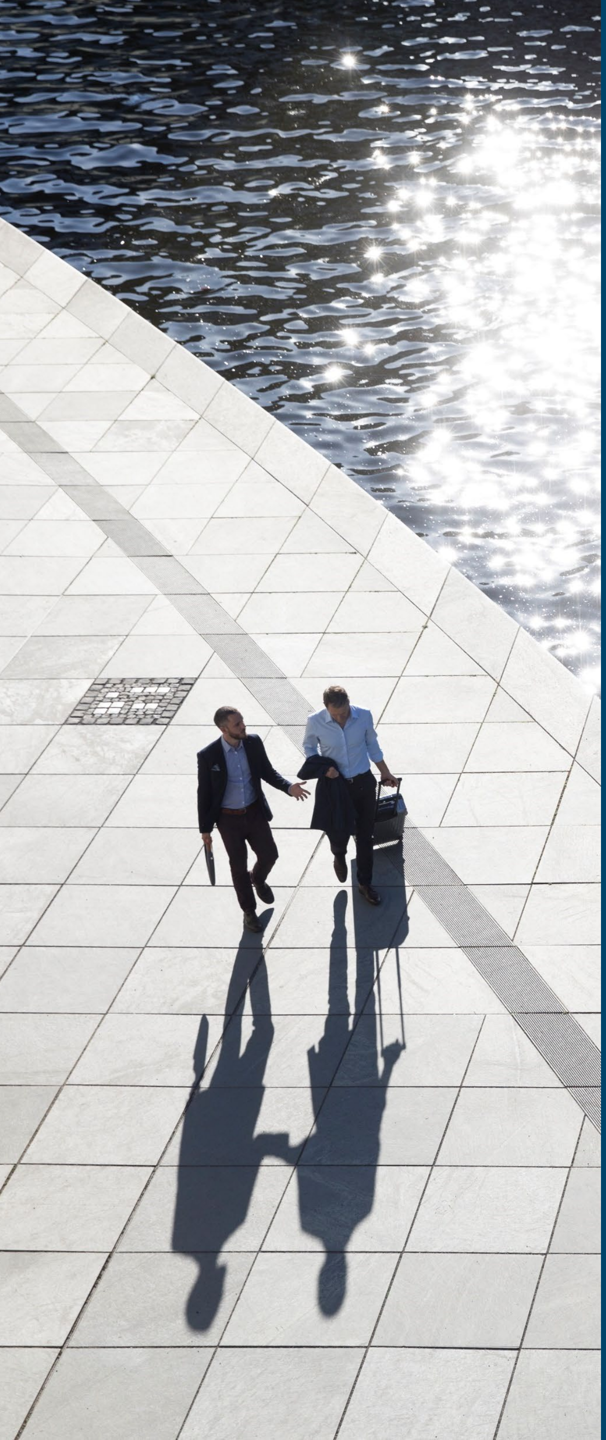

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