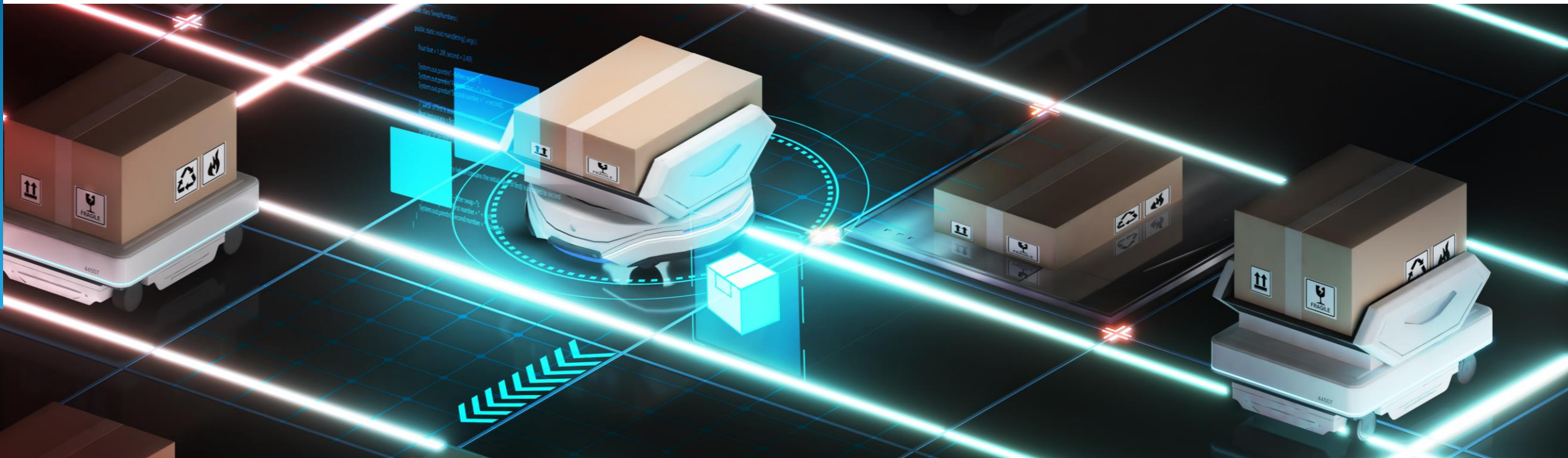


Supply Chain IT Transformation Services for Retail and CPG – Provider Compendium 2023

October 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 and profiles of 15 service providers featured on [Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment 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® Assessment 2023:

- **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 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 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 transformation service provider capability

- Supply chain 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 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

The Supply Chain IT Transformation Services for Retail and CPG 15 provider profiles

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Provider 1 profile (page 1 of 4)

Overview

Vision for supply chain transformation services for the re
 Provider 1's vision is to address an organization's overarching to grow, optimize, and protect their operations.

Overview of client base
 Key clients include leading food and beverage firms, consume goods firms.

Supply chain transformation services revenue from the R

<US\$20 million	US\$20-50 million	U
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Number of active retail and CPG clients for supply chain t

<10	10-20	
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Provider 1 profile (page 2 of 4)

Key solutions and investments

Proprietary IP/solutions/frameworks/accelerators/tools d	
Name	Details
XYZ	XYZ supply chain planning soluti listed under Asterisk are self corn
XYZ	XYZ product by provider 1 is a sourcing/procurement
XYZ	XYZ solution assess digital readir standardizing and qualitative perf
XYZ	It is a solution offered under integ
XYZ	The solution offered under custom

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Provider 1 profile (page 3 of 4)

Case studies

Case study 1 **Leading beverage firm**

Business challenge
 The firm wanted to reduce costs arising from imbalanced s legacy supply chain systems for different processes, which n supply chain bottlenecks.

Solution

- Undertook steps to merge three legacy systems into one
- Implemented XYZ on the warehouse side
- Added automation to product storage and retrieval

Impact

- Achieved US\$XYZ in global savings
- Increased responsiveness to demand and enhanced qual
- Increased productivity and operational efficiency

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Provider 1 profile (page 4 of 4)

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Provider 1 is a relevant service provider for large and mega enterprises (annual revenue >US\$5 billion) seeking comprehensive and personalized end-to-end supply chain transformation expertise with change management capabilities
- It has built and proactively leveraged multiple IP tools/accelerators/frameworks, such as XYZ, which has 15+ solutions focused on various aspects of the supply chain such as transportation management and demand collaboration
- It has a strong network of partners, including leading technology vendors in the supply chain space such as XYZ, XYZ, and XYZ
- Provider 1's thought leadership emphasizes the leverage of next-generation technologies in supply chain engagements and their messaging around end-to-end supply chain management highlights the breadth of coverage

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
- Its engagements are skewed toward consulting services; clients seeking application services expertise may find its capabilities relatively limited
- Provider 1 shows limited degree of flexibility in supply chain management engagements. However, changes to the scope of work typically come with an additional fee

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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 Transformation Services for Retail and CPG PEAK Matrix® Assessment 2023	September 2023
Digital Effectiveness in the Consumer Product Goods Industry Identifying Food & Beverage Leaders	October 2023
Supply Chain IT Transformation Services for Retail and CPG – Provider Compendium 2023	October 2023
Reimagining the Retail and CPG Value Chain with AI	Q4 2023
Supply Chain Transformation Services for Retail and CPG – State of the Market 2023	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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