



# The Transport Management Systems Market

4th Edition

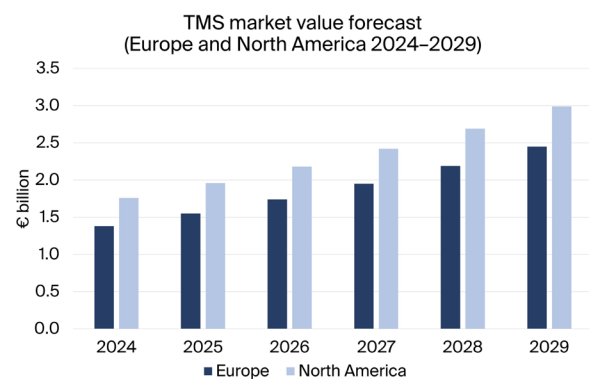
*The Transport Management Systems Market is the fourth consecutive report from Berg Insight analysing the latest developments on this market in Europe and North America. This strategic research report from Berg Insight provides you with 180 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The TMS market value in Europe and North America to exceed € 5 billion by 2029

Transport management systems are used by businesses to manage logistics and streamline shipping. A transport management system (TMS) is a logistics platform that helps plan, execute and optimise the physical movement of goods. Dedicated transport management systems first emerged in the 1980s and were mainly adopted by larger companies. The TMS market has since then evolved considerably and cloud-based solutions today offer scalable alternatives for businesses of any size across industry sectors. Berg Insight estimates that the value of the European TMS market reached around € 1.4 billion in 2024. Growing at a compound annual growth rate (CAGR) of 12.2 percent, the market value of transport management systems in Europe is forecasted to reach € 2.5 billion in 2029. The North American TMS market is at the same time forecasted to grow from an estimated € 1.8 billion in 2024 to reach almost € 3.0 billion in 2029, representing a CAGR of 11.2 percent.

Solution vendors range from small specialised TMS developers active in local markets to the major enterprise software providers with worldwide presence. Some of the most notable players on the North American TMS market are Trimble Transportation and McLeod Software. Trimble is a major industrial technology company which offers a suite of TMS solutions following multiple acquisitions, while McLeod has focused specifically on serving the trucking industry for 40 years. Providers of broader supply chain and logistics offerings such as Blue Yonder, Manhattan, E2open (acquired by WiseTech in 2025), Descartes (including 3G acquired in 2025) and Kinaxis are also competing in the TMS space. Mastery, Turvo, TMSfirst, FreightWise (including Kuebix acquired in 2023) and Shipwell are additional examples of players with a primary TMS focus. The global logistics company C.H. Robinson (the former TMC division) is yet another example.

Uber Freight also has a TMS business (stemming from the acquisition of Transplace). The major US-based cloud infrastructure and software provider Oracle is active in this space with its Oracle Transportation Management offering deployed across all geographic markets. The Germany-based enterprise application software giant SAP similarly offers SAP Transportation Management globally. The European TMS market is further served by players such as Transporeon (now owned by Trimble), Infios (formerly Körber Supply Chain Software, including US-based MercuryGate acquired in 2024), 4flow, proLogistik, AEB, ecovium, Solvares, Soloplan and LIS based in Germany; the French groups Generix (including DDS), SINARI and AKANEA; Microlise (including Enterprise Software and Vita Software), Aptean 3T, Mandata and HaulTech in the UK; Alpega headquartered in Austria; BlueRock TMS, Navitrans and Boltrics based in Benelux; nShift, Pagero, AddSecure and Opter in the Nordics; Inelo headquartered in Poland; the Italian companies TESISQUARE and SIMA; Alerce based in Spain; as well as AndSoft in Andorra. The latter is active throughout Europe and beyond.



## Highlights from the report

**Insights** from numerous interviews with market-leading companies.

**Descriptions** of transport management functionality and associated concepts.

**Comprehensive overview** of the transport management value chain.

**In-depth analysis** of market trends and key developments.

**Profiles** of 60 companies offering transport management systems.

**Market forecasts** lasting until 2029.

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### Glossary

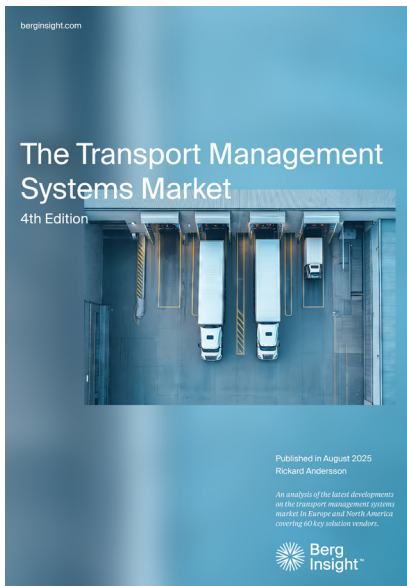
## The report answers the following questions

- What different types of players are involved in the transport management value chain?
- Which are the major specialised TMS solution providers?
- What offerings are available from broader supply chain and logistics software vendors?
- How are the major enterprise software providers approaching the market?
- Which are the front-running geographic markets for TMS solutions so far?
- What are the typical pricing models for transport management systems?
- Which trends and drivers are shaping the market?
- How will the TMS industry evolve in the future?



## About Berg Insight's IoT market research

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## Who should read this report?

The Transport Management Systems Market is the foremost source of information about this market in Europe and North America. Whether you are a TMS solution vendor, shipper, carrier, telematics vendor, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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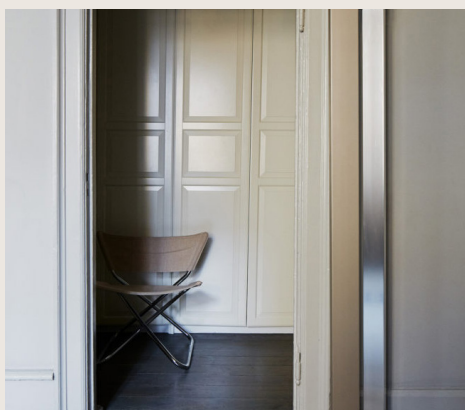


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