

ASK THE EXPERTS: WHITE PAPER

WMS Market Breakdown What's Now, What's Next



Overview:

The Warehouse Management System (WMS) market exceeded \$3 billion in 2024 and has a five-year CAGR forecast in double digits.* That growth reflects a clear trend—many organizations are actively evaluating or planning to invest in a WMS to meet rising customer expectations, support operational complexity, and enable digital transformation.

But this momentum comes at a time of economic uncertainty, when every investment is under greater scrutiny. At the same time, WMS pricing models are becoming more complex, and the cost of implementation continues to rise. So how can you ensure that your WMS investment delivers value—not just today, but in the years ahead?

To help answer that question, we gathered industry experts for a discussion on the current state of the WMS landscape, including insights from two of the industry's most influential reports: the 2025 Gartner® Magic Quadrant™ for Warehouse Management Systems and its companion report, the Gartner Critical Capabilities for Warehouse Management Systems.

Here's what the pros have to say about making the most of that data—and what else you should know before investing in a new WMS.

Meet the Experts



Greg Utter

Senior Managing Director,
Alpine Supply Chain Solutions



Howard Turner

Director Supply Chain Systems,
St. Onge



Amit Levy

EVP of Sales and Strategy,
Made4net

Q: The 2025 Gartner® Magic Quadrant™ for Warehouse Management Systems states, “Although functionality remains the primary user evaluation criterion, there’s near-functional parity for basic core WMS capabilities across WMS providers.” Given that, what should WMS buyers be paying attention to in their evaluation process?



Greg Utter, Senior Managing Director, Alpine Supply Chain Solutions, explains that while core WMS functionality is largely the same across top vendors—buyers should focus their evaluations on what sets vendors apart beyond the basics.

He emphasizes “the importance of identifying your company’s unique operational requirements early in the process and using those as a benchmark during vendor evaluations.” Every business has several critical needs that must be addressed for a WMS to be a good fit.

Howard Turner, Director Supply Chain Systems, St. Onge, agrees and adds that differentiators today go beyond functionality. He recommends that buyers assess:

- IT strategy and technical architecture
- SaaS deployment and support models
- Cultural fit with the vendor
- Pricing structure
- Ease of training and use
- Quality of the implementation approach

Figure 1: Magic Quadrant for Warehouse Management Systems



Gartner.

In a mature market with functional parity, these strategic and operational factors often make the difference between a successful partnership and a costly misalignment.

Q: With ongoing volatility now a constant in the supply chain, how can the right WMS help organizations stay flexible and adapt to evolving business needs?



All experts agree that the right WMS acts as a core foundation for supply chain flexibility. As Turner explains, “While the WMS primarily supports the distribution center, its role extends far beyond the four walls—connecting with suppliers, vendors, customers, and upstream systems like ERP. It enables visibility into inventory, facility capacity, and overall performance, and provides the data needed to make timely, informed decisions as conditions shift.”

Utter emphasizes that flexibility starts with future-focused design. “What you're doing today will likely evolve—whether through new fulfillment models like cross-docking, increased compliance requirements, or expanded lot control. When building your WMS requirements, keep your future state in mind and ensure the vendor can scale and adapt with you.”

Bottom line: A well-designed WMS isn't just built for today's workflows—it's built to support tomorrow's changes.



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Greg Utter
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Alpine Supply Chain Solutions



Q: This year's Critical Capabilities for Warehouse Management Systems report assesses vendors across 11 critical capabilities, What are the most important WMS capabilities customers should pay close attention to during the selection process?



There's a lot happening in the market right now—but at the end of the day, operations need to stay focused on what matters most for their unique requirements. Still, if our experts had to pick a few capabilities that are especially important in today's environment, they would be:



Implementation and Integration Tools

Utter emphasized integration as a critical factor—often the most complex part of a WMS project. Buyers should ensure the system can connect seamlessly with existing and future technologies, including material handling equipment, robotics, and broader supply chain systems.

11 Critical Capabilities for WMS:

1. Core WMS
2. Extended WMS functionality
3. Usability
4. Implementation and integration tools
5. Analytics and performance management
6. Systems/technical architecture (new)
7. Intralogistics smart robotics support (new)
8. Material handling integration
9. Simplicity of use and operation
10. Adaptability
11. Supporting technologies



Simplicity of Use and Operation

All three experts agreed: the system must be intuitive and easy to navigate. Minimize clicks, simplify data entry, and ensure warehouse staff can quickly learn the system. A user-friendly interface accelerates onboarding, improves productivity, and contributes to faster time-to-value.



Core and Extended Functionality

Turner stressed the importance of aligning the WMS with your business-critical processes. He recommends clearly identifying “must-have” vs. “nice-to-have” functionality, and using that framework to evaluate how well each system supports your current and future state requirements.



Adaptability

Amit Levy, EVP of Sales and Strategy, Made4net, called out the need for systems that can evolve with the business—especially in today’s fast-changing environment. Look for platforms that support low-code configuration, templated workflows, and rapid adjustments without heavy vendor dependency.

Q: Many of the most critical WMS capabilities today—from usability and analytics to robotics support and adaptability—are ultimately tied to a system’s configurability. Why is configurability becoming such a pivotal requirement?



Configurability in WMS platforms plays a role in delivering:

Speed and Simplicity of Implementation:

Tools like configuration wizards, packaged workflows, and pre-built integration templates help accelerate deployment and reduce disruption, which is vital for multi-site rollouts and minimizing time to value.

Integration Flexibility:

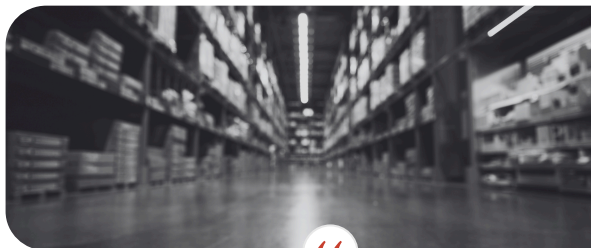
WMS solutions must easily integrate with diverse systems (e.g., ERP, automation, e-commerce) through APIs and connectors, avoiding custom development and supporting hybrid environments.

Ongoing Support and Upgradability

Long-term success depends on how easily a system can be upgraded, maintained, and rolled out to new sites, with tools for version control, configuration management, and testing.

But Utter explains that, “Configurability is both a blessing and a challenge. While it offers flexibility, it requires disciplined focus on what truly matters for your specific business. Every operation has unique needs, so it’s crucial to stay laser-focused on the requirements that drive performance.”

He also highlights the growing convergence of WMS (Warehouse Management Systems), WES (Warehouse Execution Systems), and WCS (Warehouse Control Systems) into unified solutions. Companies must clearly understand their current and future states to determine whether a single solution can support their needs or if multiple providers are required.

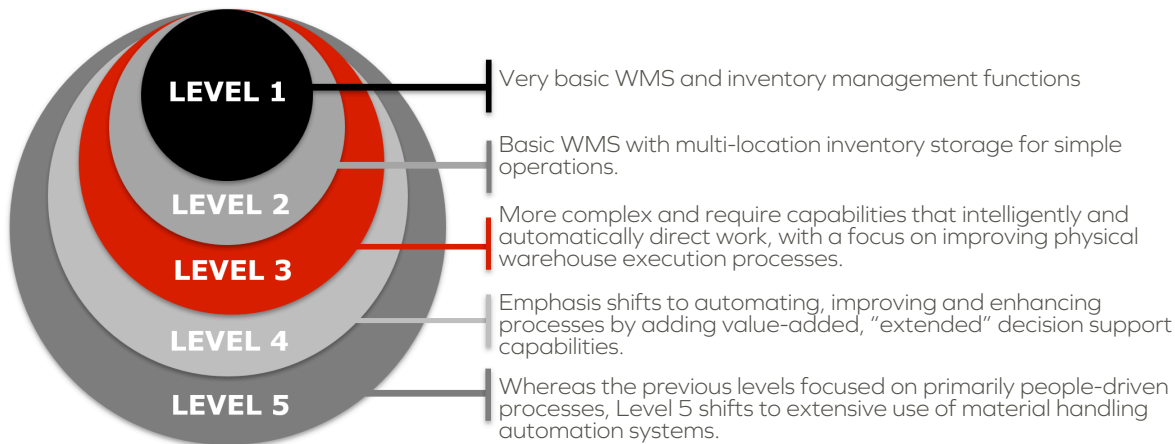


“In today’s environment, speed, flexibility, and scalability are essential. When evaluating implementation and integration tools, customers focus on how these capabilities reduce time to value and lower long-term total cost of ownership—key factors in making a WMS investment worthwhile.”

Amit Levy
EVP of Sales and Strategy, Made4net



Q: The Critical Capabilities for Warehouse Management Systems report evaluates WMS solutions across five Warehouse Operation Use Cases—ranging from low to high complexity. How important is it for WMS buyers to align solution fit with their operational complexity?



According to Levy, "Buyers are increasingly using Gartner's Level 1-5 operational complexity model to assess WMS fit. They're asking whether a solution meets current needs and can scale with future growth and automation goals. The Critical Capabilities framework helps map business priorities to the right system features—whether it's adaptability and ease of deployment for Level 2-3 operations or robotics integration and advanced analytics for Level 4-5. At the end of the day, the best WMS isn't the one with the most features—it's the one that aligns best with your strategy."

Turner expresses concern that many companies misinterpret Gartner's complexity levels—often assuming they're based solely on warehouse size. In reality, true complexity involves deeper factors like process variability, labor dynamics, and automation. This misunderstanding can lead to poor WMS selections. He emphasizes the value of working with experienced consultants who can help organizations accurately assess their operational complexity and make more strategic, well-aligned WMS decisions.

Utter agrees that most customers don't fully grasp the dynamics of warehouse complexity and many mistakenly assume that only vendors in the Gartner Magic Quadrant's top right are a good fit, when in fact a vendor outside that quadrant might better meet their current and future needs—often at a lower cost.

He highlights that as warehouse complexity increases (especially at level 5), material handling and warehouse control systems (WCS) play a bigger role, reducing reliance on the WMS. Greg also stresses that warehouse size doesn't determine complexity. A large DC may be simple (e.g., pallets in/pallets out), while a small facility (like a 50,000 sq. ft. pharma site) may be highly complex due to regulatory and operational requirements. Ultimately, he sees consultants as guides who help companies navigate these complexities to select the right WMS for their unique business.



"At the end of the day, the best WMS isn't the one with the most features—it's the one that aligns best with your strategy."



Amit Levy

EVP of Sales and Strategy,
Made4net

Q: Why is consistent performance across a variety of operational environments such a compelling advantage for a WMS today?



According to Levy, a WMS is a long-term, strategic investment—often with a lifespan of 10 years or more—so it's critical to choose a solution that can grow and adapt as operations evolve. *"In today's environment, where supply chains are under constant pressure to expand into new channels, adopt automation, and manage increasing complexity, consistent performance across diverse environments is essential."*

Made4net's Warehouse Expert WMS stands out as the only solution to maintain a score above 3.0 across all five of Gartner's warehouse use cases.



Unlike many systems that are tailored to specific facility sizes or complexity levels, Made4net offers a single, highly scalable platform that performs equally well in both small, straightforward operations (Level 1) and large, highly automated facilities (Level 5). The result: no need for multiple systems or trade-offs—Made4net delivers consistent functionality, usability, and integration flexibility across the board.

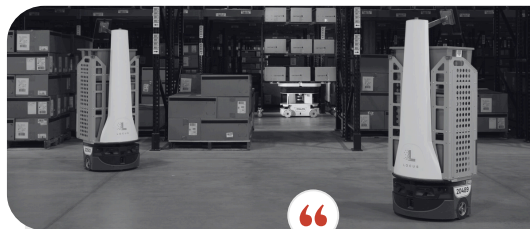
Q: Intralogistics smart robotics support is called out as a key capability in the report. It's clear that robotics and automation are no longer emerging trends—they're quickly becoming the norm in warehouses and DCs. *What opportunities—and challenges—do customers face when implementing robotics and material handling systems in their operations?*



Turner cautions that, post-COVID, many companies rushed into robotics as a safeguard against labor disruptions—often without clearly defining their goals or success metrics. He emphasizes the importance of having a well-defined business case and understanding what success looks like: *"Is it simply to replace human labor, or is the goal to increase throughput, boost productivity, and create a smoother, more efficient supply chain?"*

Turner emphasizes that integration is one of the biggest challenges when implementing robotics and automation. He explains that it's critical to clearly define the roles and responsibilities of systems like WMS, WES, and WCS to avoid overlap and ensure smooth communication. He also cautions, *"That while robotics is often marketed as a cure-all, it's not a magic solution—success depends on having well-defined use cases."*

Companies should start small, validate performance, and scale gradually. Automation should be seen as a tool that supports specific processes (like goods-to-person picking), not a standalone solution. And despite the hype, fully automated "lights out" warehouses aren't the norm—each decision must be made based on the unique needs of the operation.



"While robotics is often marketed as a cure-all, it's not a magic solution—success depends on having well-defined use cases."

Howard Turner
Director Supply Chain Systems,
St. Onge



The decision to invest in a new WMS can feel like a high-stakes gamble. Economic turbulence, internal uncertainty, and widespread misconceptions about implementation often lead companies to delay—even when they know change is needed.

What's the best way to determine if it's truly time for a new WMS?



Utter advises starting with a solid business case. Begin by asking some foundational questions:



Is your current WMS nearing end-of-life or no longer supported?



Are you facing new regulatory, compliance, or customer requirements that your current system can't handle?



Are you expanding into new sales channels, adding automation, or pursuing other growth that your WMS can't support?



Are labor challenges making current operations unsustainable?

It's also critical to understand leadership's perspective. At the C-level, the key question is often: Can we continue to operate effectively with the current system for the next few years? If the answer is yes, it's harder to justify the investment—unless future needs clearly demand it.

Evaluate your key drivers, and be cautious of two common pitfalls:

- Inaction: Waiting too long can lead to bigger problems down the line.
- Overreaction: Rushing into a WMS replacement without a clear business case can result in costly, unnecessary projects.

In short, a WMS investment should be strategically driven, supported by data, and aligned with your future-state goals—not just a vague sense that "we need something new."

Utter adds that these are not quick projects. Expect to spend 3–4 months selecting a vendor, followed by 6–12 months for implementation. Given that a WMS is a 10–15 year decision, it's critical to take the time to get it right, rather than rushing the process.

If a company decides the time is right to move forward with a new WMS, what's one thing they can do from the start to significantly improve their chances of a successful outcome?



Turner emphasizes that companies should focus on implementing the WMS as designed to meet their core operational needs—rather than overdesigning it to solve every rare or historical issue. He warns against the temptation to add unnecessary complexity. Staying disciplined and resisting the urge to address every edge case leads to better outcomes, even though it's harder than it sounds.

Utter advises planning a thorough, detailed design session focused on full configurability. Any deviation from the standard solution should be carefully documented, justified with a clear ROI, and approved by top-level governance before requesting changes from the vendor.

Finally, Levy urges customers to approach the selection process well-prepared—clearly understanding their pain points and focusing on solutions that meet current needs while supporting future growth.

Ready to learn more?

Watch the full conversation here:

Let's Talk WMS: 2025 **Gartner® Magic** **Quadrant™ Findings and** **Market Analysis**



M A D E 4 N E T

Made4net is a global leader in WMS (Warehouse Management System) and supply chain execution software, delivering best-in-class, cloud-based WMS and 3PL WMS solutions. Our adaptable and scalable platform empowers organizations of all sizes to improve efficiency, visibility, and control across their supply chain.

Made4net's end-to-end SCExpert™ platform offers a robust WMS solution that enables real-time inventory visibility, labor management, and equipment productivity with performance analytics that drive faster, more accurate order fulfillment and improved supply chain efficiency. In addition to the best-of-breed WMS, the platform offers integrated yard management, dynamic route management, proof of delivery and warehouse automation solutions that deliver a true supply chain convergence. Made4net is proud to be recognized by analysts and industry experts as a global leader in warehouse management software, including the Gartner Magic Quadrant for Warehouse Management Systems.

For more information, visit www.made4net.com.

Sources:

*Gartner, Magic Quadrant for Warehouse Management Systems, Simon Tunstall, Dwight Klappich, Rishabh Narang, Federica Stufano, May 1, 2025.

**Gartner, Critical Capabilities for Warehouse Management Systems, Rishabh Narang, Simon Tunstall, Dwight Klappich, Federica Stufano, 28 May 2025

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