Logistics Technology Whitepaper Series

Trends in Visibility Software

Visibility software is arguably the most influential new technology to emerge in the global logistics sector over the last decade. Similar to Transportation Management Systems in the late 90s, visibility software has become an integral part of the operations of global freight providers: acting as a silo for the data that shapes their daily decisions. Trends have emerged in the sector in the last few years that offer new opportunities for freight providers to better use visibility data to make better decisions and provide clear insights to their customers.

True End-to-End Visibility

The visibility software landscape has been defined over the last few years by the arms race for true end-to-end visibility between the large visibility software providers. These providers have increasingly invested, organically and via acquisition, in systems capable of providing granular data from A to Z in the shipment life cycle. This true end-to-end visibility and the scale of global supply chains is the main factor for the rapidly emerging gap between the large visibility providers and their competitors.

Advanced Analytics

Visibility providers are increasingly taking complex data and concepts to create simple interfaces for planning and decision-making. One public example is the Fourkites congestion map. As of April 2022, the map displayed a wait time at the port of Los Angeles of 2 days 7 hours (4500% over the average wait time). With an accurate number like this, customers can plan accordingly from booking pick-up times with their drayage provider to accurately providing delivery times to their customers.

> " I spent over a decade of my life building a TMS for global logistics service providers. Our product CargoWise was strong in comparison to our competitors in terms of providing tools for the non-asset-based freight forwarders and CHBs to offer track and trace to their customers. While CargoWise, Magaya, Descartes, Supply Vision, Softlink, Reige….to name a few, have all enhanced their own visibility capabilities, the game seems to have changed. Shippers are not waiting for the logistics service providers to give them real-time location data for every shipment. They are signing up to companies like FourKites and Project44 and demanding to know where their products are at every step in the supply chain; not just the portion-controlled by the global freight forwarders and their TMS provider. Whether it is a domestic shipment or international shipment stuck in line at a port, they want full visibility… and they want it now. This is going to be a very interesting space to watch. "

Cris Arens, Logisyn - Managing Partner

Providing Visibility to All Stakeholders

Visibility software is predisposed to be a great client-facing tool: allowing freight providers to offer real-time updates on the status of freight. Take the recent "supply chain crisis" and high port waiting times for example. A panicking customer dealing with weeklong shipping delays at the port will be much happier to wait if you can offer real shipment data and updates on when their freight will actually be delivered.

Partner Integrations

While most lawyers will agree that the data belongs to the shippers and LSPs, TMS software competitors don't always play nice with each other. Visibility providers who don't compete with the TMS providers and are seen as neutral are increasingly integrating with third-party software; acting as a silo for real-time data that automatically gets fed into customers' systems. Traditionally this has meant integration into a customer's transportation management system, but many fascinating integrations with third-party software have emerged across the logistics software landscape. Two industry-leading integrations being: FourKites integration with DAT's loadboard and Project 44's integration with SAP.

Logisyn's Top 10 Most Influential Supply Chain Visibility Providers

A selection of the Visibility providers that Logisyn views as the most influential in the space. We do not advertise and are not compensated for their inclusion on the list.

FOURKITES

End-to-End Visibility Provider
Based in Chicago, FourKites is one of the two leading providers of end-to-end global supply chain visibility software. FourKites raised 100 million USD in a 2021 Series D.

| **Recent Acquisitions** | • Haven, Inc | • TrackX |
| | • NIC-place | |

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project44

End-to-End Visibility Provider
Based in Chicago, Project44 is one of the two leading providers of end-to-end global supply chain visibility software. Project44 raised 420 Million USD in a PE round led by Thoma Bravo in early 2022.

| **Recent Acquisitions** | • Synfioo | • Convey |
| | • Clear Metal | • Ocean Insights |

DESCARTES MacroPoint

Hybrid Visibility Provider
Descartes Macropoint is one part of the wider Descartes suite of logistics software. Descartes is a publicly-traded company on the NASDAQ with a market cap of 5.38 B USD in April 2022.

| **Recent Acquisitions** | • NetCHB | • Portrix |
| | • GreenMile | • QuestaWeb |

SHIPPEO

End-to-End Visibility Provider
Based in France, Shippeo is the leading European provider of visibility software. Shippeo raised 32 Million USD in an early 2021 series C.

| **Recent Acquisitions** | • Ophone |

FarEye

End-to-End Visibility Provider
Based in India, FarEye is a rapidly growing newcomer to the global visibility software space. FarEye raised 100 M USD in a 2021 series E.

| **Recent Acquisitions** | • PIY Technologies |
| | • Dipper |

roambee

Visibility Provider with Niche Specialization
Roambee is a provider of end-to-end visibility software with strong capabilities in niche aspects of supply chains including cold chain distribution. Roambee raised 18 Million USD in a 2021 series B1.

| **Recent Acquisitions** | • Modum |
| | • Arnekt Solutions |

tive

Visibility Provider with Niche Specialization
With offices globally, Tive is a visibility software provider with a niche focus on cold chain logistics.

| **Recent Acquisitions** | • MyTrackingDevices |

wakeo

Global Shipments Visibility Provider
Based in France, Wakeo is a rapidly growing provider of multimodal visibility software – air/sea/road. Wakeo raised 11 million USD in a late 2021 series A.

GRAVITY

Parts Procurement Visibility Provider
Gravity provides visibility software for the parts procurement aspect of supply chains. Gravity raised 7 million USD in late 2018.

LOGIXBOARD

Global Trade Management Visibility Interface
Logixboard offers simple visibility interfaces for the complex trade data available on CargoWise and other GTMs. Logixboard raised 32 Million USD in a late 2021 series B.

Exclusive Insight • ⊡ HAVEN | ◆ FOURKITES Transaction

Logisyn was honored to act as the exclusive sell-side advisor in the sale of Haven to FourKites. FourKites is well-positioned to leverage Haven's technology in the global logistics solutions race. **Read Logisyn's official press release**

Our goal at Logisyn is always to create optimal synergy within the logistics industry by bringing incredible executives together with the right strategic partner to maximize their future growth.

To read more about what our customers have to say, visit our testimonials page or check out our recent transactions.

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Please email max.arens@logisyn.com if you would like to participate in the upcoming series, if you have an idea for a topic you'd like Logisyn to feature, or if you have any other inquiries.