



# Supply Chain Transformation Services for Retail and CPG

## PEAK Matrix® Assessment 2025

Focus on TCS

April 2025



# Introduction

Supply chain services are the most significant investment area for Retail and CPG (RCPG) firms, driven by the need for agility, resilience, and efficiency. As these firms navigate evolving market dynamics, digital disruptions, and sustainability demands, supply chain transformation has become a strategic priority for them. To drive meaningful change, service providers must offer a holistic approach that integrates IT and business process services with strong advisory capabilities. Advanced analytics, AI-driven insights, and automation play a critical role in optimizing supply chain operations and improving visibility. Additionally, robust capabilities in demand forecasting, inventory management, and supplier collaboration are essential for mitigating risks and ensuring seamless execution. Service providers must also address industry-specific complexities, such as omnichannel fulfillment and last-mile logistics, to deliver tailored solutions. Furthermore, ESG-driven supply chain strategies, including circular economy models and carbon footprint reduction, are gaining traction. By combining technology, domain expertise, and strategic guidance, providers can help RCPG firms achieve resilient, customer-centric, and future-ready supply chains.

In the report, we present an assessment of 15 service providers featured on the [Supply Chain Transformation Services for Retail and CPG PEAK Matrix® Assessment 2025](#). The assessment is based on Everest Group's annual RFI process for calendar year 2024, interactions with leading service providers, client reference checks, and ongoing analysis of the RCPG services market.

**The full report includes the profiles of the following providers featured on the Supply Chain Transformation Services for Retail and CPG PEAK Matrix:**

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

## Scope of this report

**Geography:** global

**Industry:** market activity and investments of 15 leading service providers in the RCPG industry

**Services:** supply chain transformation services

# Supply chain transformation services for retail and CPG PEAK Matrix® characteristics

## Leaders

Accenture, Cognizant, HCLTech, TCS, and Tech Mahindra

- Leaders excel in executing complex, multi-product/platform, advisory-led supply chain transformations by seamlessly integrating IT and business process services. Their success is driven by a well-balanced services mix and a robust global delivery network, enabling them to deliver impactful and scalable solutions
- These providers have strong partnerships with big technology firms such as SAP and Oracle, cloud vendors such as AWS, Azure, and GCP, and a majority of the supply chain specialists such as Blue Yonder, Coupa, Kinaxis, o9, and Manhattan Associates to build and innovate client-specific solutions
- They have a mature suite of supply chain-focused and retail- and CPG-related solutions to accelerate time-to-market for their clients

## Major Contenders

Capgemini, Deloitte, EY, Genpact, GEP, Infosys, and Wipro

- 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
- They are consistently investing in developing supply chain-focused solutions to improve their service delivery capabilities; however, there is a need to incorporate more industry-specific nuances into these solutions
- They take a balanced organic and inorganic approach to fill gaps across their supply chain services portfolios and further improve their global delivery footprint

## Aspirants

Sonata Software, UST, and Zensar

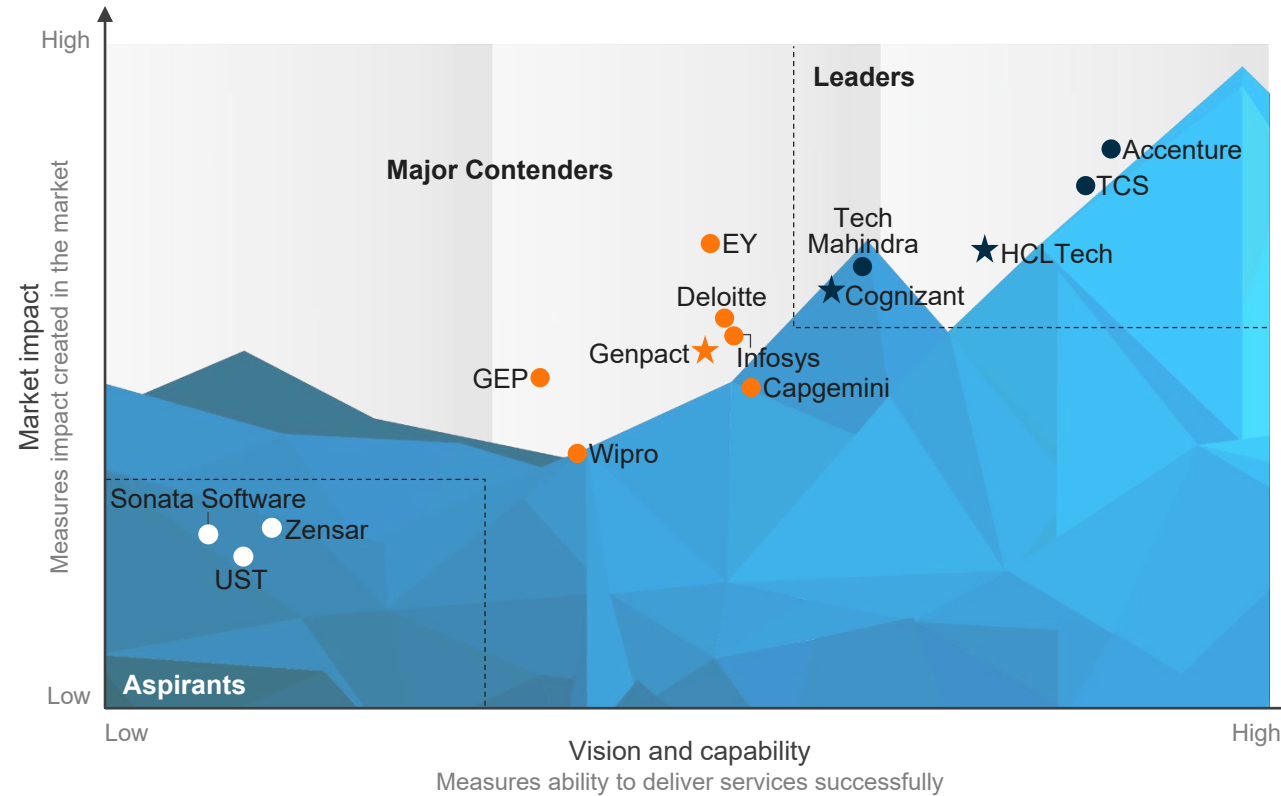
- Aspirants have good proof points in delivering implementation and/or maintenance of supply chain transformations of low- to medium-complexity for Small and Midsized Buyers (SMBs)
- They are either focused on a certain product(s) or currently have a relatively small supply chain or retail and CPG practice
- They lack the scale of supply chain-focused partnerships and IP to enable complex supply chain transformations

# Everest Group PEAK Matrix®

Supply Chain Transformation Services for Retail and CPG PEAK Matrix® Assessment 2025 | TCS is positioned as a Leader

## Everest Group Supply Chain Transformation Services for Retail and CPG PEAK Matrix® Assessment 2025<sup>1</sup>

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



<sup>1</sup> Assessments for Accenture, Deloitte, Capgemini, EY, Sonata Software, and Zensar excludes 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 (2025)

# TCS profile (page 1 of 5)

## Overview

### Vision for supply chain transformation services for the retail and CPG industry

TCS' vision is to be a trusted advisor and strategic partner in customers' journey toward building perceptive, resilient, fluid, and efficient supply chains unlocking exponential business value. TCS is focusing on three themes for supply chain transformations: 1) Robust Digital Core, enhancing core processes with cloud, automation, and AI-driven insights; 2) Connected Value Chain, ensuring real-time visibility, traceability, and risk management through IoT, blockchain, and predictive analytics; and 3) Adaptive and Orchestrated Ecosystem, leveraging generative AI and AI/ML for autonomous decision-making, dynamic disruption management, and future-proof supply chains.

### Retail and CPG supply chain services revenue (CY2023 and Q2 2024)<sup>1</sup>

<US\$20 million	US\$20-50 million	US\$50-200 million	>US\$200 million
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### Number of active retail and CPG clients for supply chain services

<20	20-50	50-100	>100
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### Overview of the client base

Key clients include global F&B majors, a major jewelry manufacturer and retailer, a large UK- based retailer, a major leading food processor, a leading fashion retailer in the UK, a leading grocery retailer from the Netherlands, an American multinational fashion company, a Swedish grocery co-operative, a global e-commerce leader, an American luxury specialty departmental store, a leading supermarket chain in the UK, and a large consumer co-operative

### Supply chain transformation services revenue mix for retail and CPG (CY2023 and H2 2024)<sup>1</sup>

● N/A (0%) ● Low (1-15%) ● Medium (16-30%) ● High (>30%)

#### By geography

● North America	● United Kingdom	● Europe
● Asia Pacific	● Latin America	● Middle East and Africa

#### By buyer size

● Small (annual client revenue <US\$1 billion)	● Midsize (annual client revenue US\$1-5 billion)	● Large (annual client revenue US\$5-10 billion)
● Very large (annual client revenue US\$10-20 billion)	● Mega (annual client revenue >US\$20 billion)	

#### By Information Technology Services (ITS)

● Consulting services	● Application services	● Infrastructure services
● Data and analytics	● Digital services	● Platform services

#### By Business Process Services (BPS)

● Plan	● Make/Manufacture	● Deliver
● After-sales		

#### By industry segment

Not disclosed

<sup>1</sup> From January 1, 2023 to June 30, 2024

# TCS profile (page 2 of 5)

## Key solutions

Proprietary IP, solutions, frameworks, accelerators, and tools

Development	Details
TCS Envirozone	It is an end-to-end cloud-based solution, driven by sustainability-as-a-service, which provides clients with a consolidated view of sustainability metrics and data. Powered by AI/ML, blockchain, and satellite imagery, it empowers businesses to enhance upstream supplier sustainability and downstream risk management, helps in responsible sourcing, carbon management, circular economy initiatives, and compliance reporting, and additionally ensures EUDR adherence.
TCS Green and Connected Ecosystem Solutions	This suite of solutions enables CPG value chain to be sustainable, traceable, regulatory-compliant (FSMA) and safe and secure by streamlining, digitizing, and transforming the end-to-end value chain. The solution harnesses the power of internet of things, patented AI-ML algorithms, drone, and satellite imagery.
TCS Crystallus solution for SAP S/4HANA retail merchandise management	It allows implementations to kickstart from a pre-configured template, reducing time-to-market.
TCS cost to serve framework	It orchestrates online customer orders intelligently, minimizing the cost to serve while maintaining high customer service levels.
TCS Dynachain™	It is a multi-enterprise ecosystem commerce platform designed for digital, cognitive, and autonomous supply network management.
TCS Intelligent Urban Exchange™ (IUX) for sustainability	It is an AI-driven sustainability decision-making platform that supports strategic planning, risk management, forecasting, monitoring, and reporting. It also enables supply chain sustainability monitoring, scenario modeling, value chain simulation, and carbon footprint forecasting with actionable recommendations for emissions reduction.
TCS Customer Intelligence and Insights™ (CI&I) for retail	It is an AI-driven customer analytics software that provides advanced analytics capabilities, including customer 360, user discovery, targeted actions, personalized recommendations, omnichannel journey discovery, and loyalty management.
TCS Crystallus solution for oracle application platform	It accelerates implementations by leveraging a pre-configured template, reducing time-to-market.
TCS Cognix™ for supply chain	This AI-driven human-machine collaboration suite has a vast ecosystem of pre-built, configurable, and reusable digital solutions that address varied digital requirements across the supply chain.
TCS Roboverse	Roboverse is an engineered system to bring TCS algorithms in embodied AI/robotics to solve problems of automation. It can optimize warehouse/sorting/distribution /fulfilment center performance by automating tasks as well as creating integration, orchestration, and optimization of wall-to-wall processes with robotics and automation equipment.

# TCS profile (page 3 of 5)

## Partnerships and investments

Key partnerships, alliances, acquisitions, and JVs

Investment name	Type of investment (year)	Details of investment
Innovation hub at customer location	Innovation hub (2024)	It established an innovation hub at the customer location as a secure space for showcasing and co-creating CPG-focused innovations. It followed an innovation calendar with monthly initiatives aligned to customer priorities. It also facilitated collaboration on supply chain challenges, enabling tailored solutions.
Innovation hub Kolkata	Innovation hub (2024)	It established an innovation hub in Kolkata to showcase key CPG solutions in revenue growth management, sustainability, and supply chain collaboration. It consolidated insights and demonstrations for an innovation-driven environment. It also highlighted innovative offerings through hands-on experiences, providing customers with a clear understanding of solution impact across the CPG value chain.
Nvidia	Partnership (2024)	It partnered with Nvidia to launch industry-specific AI solutions, accelerating AI adoption at scale. It delivered these solutions through a dedicated business unit under the AI.Cloud division. It also built on a five-year collaboration, combined complementary capabilities, and provided tailored offerings for various industries to drive innovation and efficiency.
Beroe	Partnership (2023)	It partnered with Beroe to provide category-specific solutions, including supplier market intelligence, supplier discovery, and benchmarking. It also served as a global partner for supplier market intelligence.
MDO Prospecta	Partnership (2023)	Partnered with MDO Prospecta for master data management, ensuring data quality and efficient data management processes.
SAP innovation center	Innovation center (2023)	Established a partnership with SAP for innovation, go-to-market strategies, and CPG industry offerings.
CPG SAP innovation hub	Innovation hub (2023)	Established a partnership with SAP for co-innovation, go-to-market strategies, and CPG industry offerings.
Blume Global	Partnership (2022)	It partnered with Blume Global to leverage a suite of digital solutions, including Blume finance for freight audit transparency, control tower for exception management, Blume logistics for real-time logistics tracking, and asset optimization for supply chain efficiency and cost reduction.
Resilinc	Partnership (2022)	Partnered with Resilinc to enhance supply chain risk management, providing proactive risk mitigation and resilience-building strategies.
One Network	Partnership (2021)	Partnered with One Network to help retailers digitize their supply network, improve on-shelf availability, increase revenue, reduce COGS, lower inventories, and enhance visibility across their B2B network.
e2Open	Partnership (2021)	Partnered with e2Open to leverage strong solutions across the value chain, including demand planning, supply planning, global logistics orchestration, import management, end-to-end visibility, and risk management.

# TCS profile (page 4 of 5)

## Case studies

### CASE STUDY 1

Driving a large planning transformation – connected supply chain planning for a leading food and beverages major

#### Business challenge

The client faced challenges in ensuring a resilient and agile supply chain. With fragmented visibility across factories for demand and supply, inventory and distribution remained a complex task. The client needed a singular platform to unify these elements and establish future-ready advanced supply chain planning. Additionally, transitioning to new dimension planning software without disrupting business operations posed a significant risk. To future-proof its operations, the client sought to define a strategic roadmap, clustering factories into markets and regions ensuring efficiency and seamless decision-making.

#### Solution

- Leading partner for rollout of OMP supply chain planning covering demand, supply, network, and factory planning
- Inventory and distribution planning/optimization to improve On Time In Full (OTIF) delivery performance and stock availability across markets
- Global process template to standardize end-to-end planning processes
- Solver configuration, scenario simulation, and optimization for improving logistics costs

#### Impact

- More than 380 factories targeted for supply chain planning process transformation globally by 2028
- Improved forecast accuracy and supply planning

### CASE STUDY 2

Streamlined transport compliance, automated declarations, and enhanced efficiency for a leading UK-based fashion retailer

#### Business challenge

The client struggled to manage transport declarations, which were required for all sorts of goods transportation, were time-sensitive, and varied by country. It relied on manual processes, which resulted in mistakes and inefficiencies. There was risk of severe fines due to non-compliance, while expansion into new markets required quick adaptation to unique regulatory requirements.

#### Solution

- Implemented an e-Transport solution to streamline transport declarations
- Developed a unified platform for managing transport declarations across multiple countries
- Minimized user intervention by automating country-specific declaration generation and submission
- Standardized the transport declaration process across countries to enhance user experience
- Improved efficiency by reducing declaration time, minimizing errors, and lowering the risk of non-compliance penalties










#### Impact

- Automated the declaration of goods being transported
- Added agility to compliance
- Established a unified compliance process
- Configured systems and ensured adherence to diverse fulfillment compliance requirements
- Supported global compliance expansion

# TCS profile (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  Low  High

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

Strengths

- TCS has a robust partnership ecosystem including top-tier partnerships with hyperscalers (such as Azure, AWS, and GCP), ERP providers (such as SAP and Oracle), and specialist supply chain providers (such as Blue Yonder, Coupa, Kinaxis, and o9)
- It has developed and leveraged solutions such as the Supply Chain Control Tower (SCOT), TCS DigiFleet, and DynaPort, alongside industry-specific IP such as AlgoRetail and Optumera to strengthen its supply chain capabilities and accelerate time-to-market
- TCS focuses on implementing and managing both ERP and specialized supply chain platforms across various functions, integrating them to create a composable supply chain system, while also addressing emissions management and ESG compliance use cases
- It has invested in developing ESG-focused tools such as Envirozone and Green and Connected Ecosystem Solutions, which support supplier mapping, sourcing, regulatory compliance, and emissions tracking
- Its strong technical expertise, pricing and commercial flexibility, and account management capabilities are well-perceived by the market

Limitations

- Clients have highlighted that TCS needs to enhance its talent management capabilities, particularly in reducing the turnaround time for replacing experienced resources lost to attrition
- It has limited proof points in delivering planning services when compared to peers

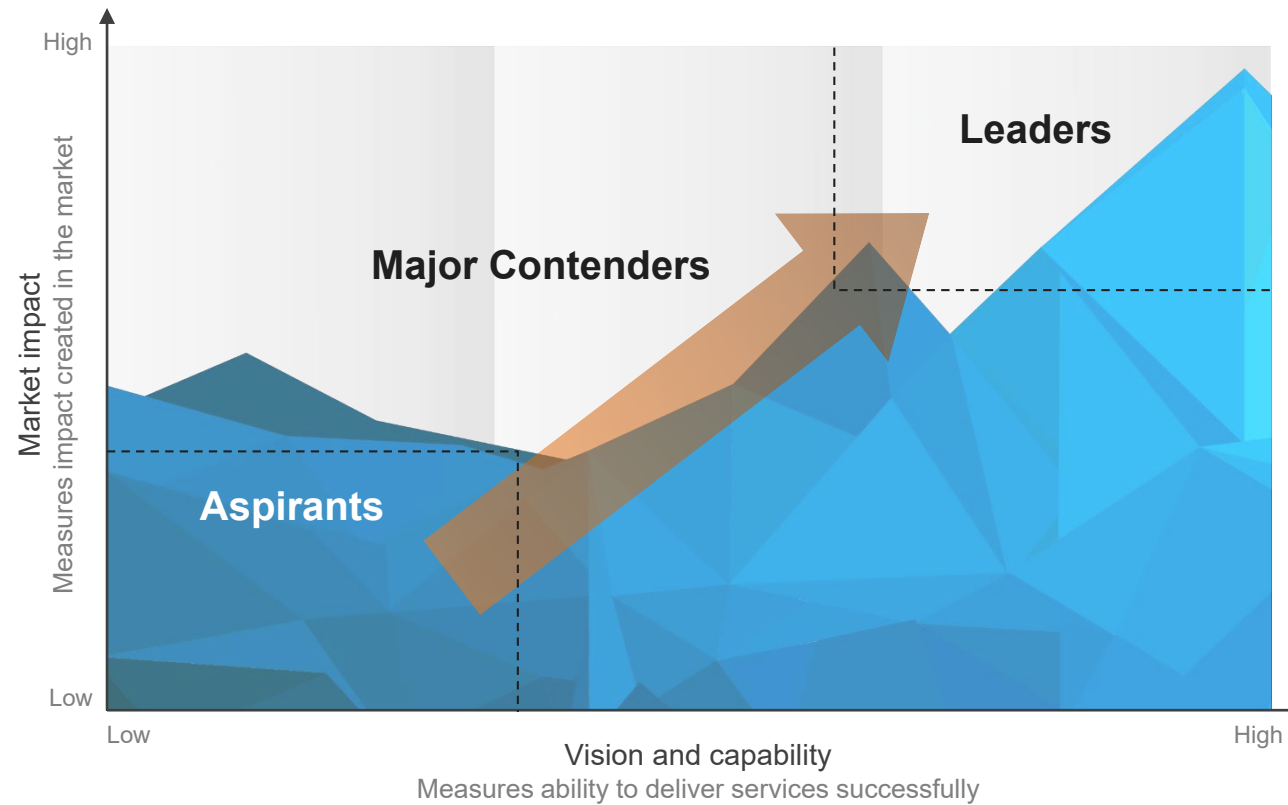
# Appendix

PEAK Matrix® framework

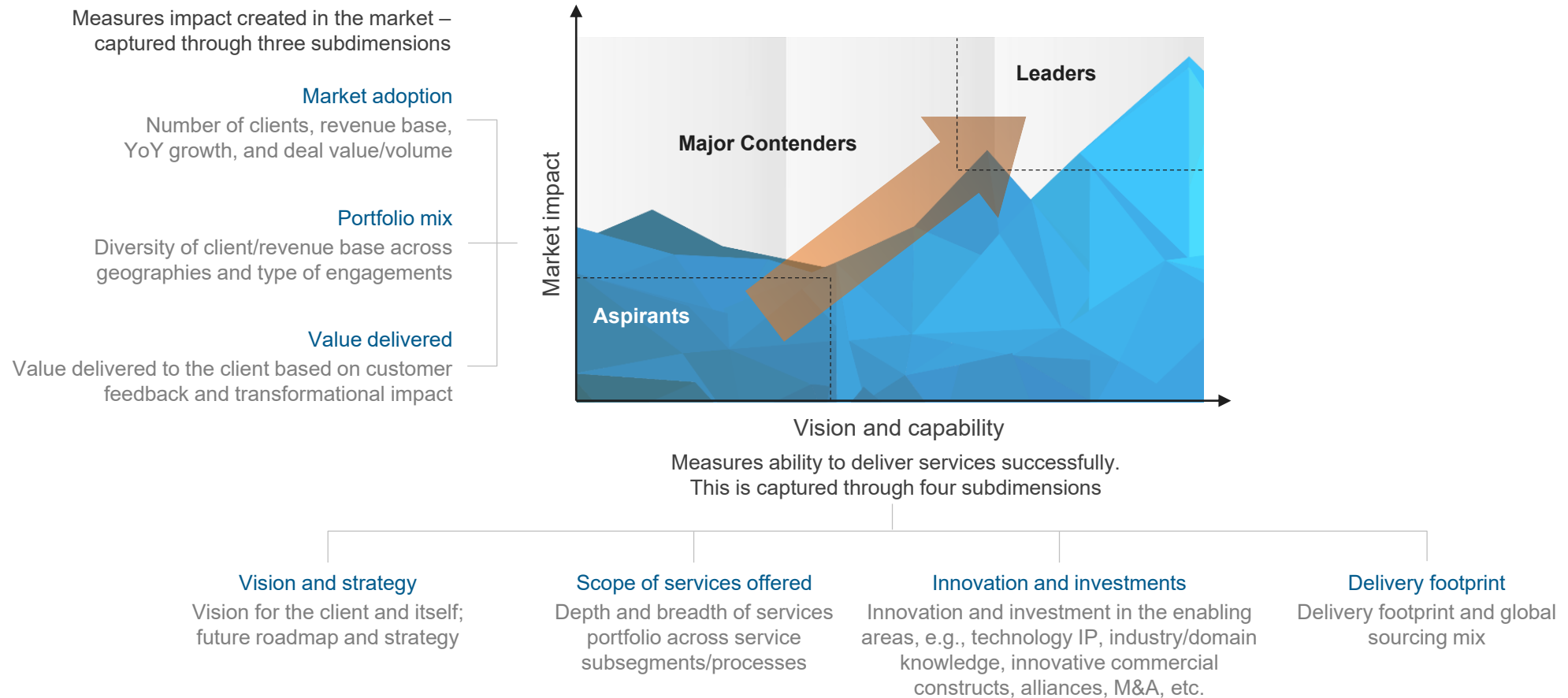
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



# Services PEAK Matrix® evaluation dimensions



## FAQs

**Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?**

**A:** Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

**Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?**

**A:** No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

**Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?**

**A:** A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

**Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?**

**A:** Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

**Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?**

**A:** Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

**Q: Does the PEAK Matrix evaluation criteria change over a period of time?**

**A:** PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

# Stay connected

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