

## Visibility vendors move to extend reach and relevancy in rebalancing market



*FourKites CEO Matthew Elenjickal said partnerships between visibility vendors and other software providers have not benefited shippers as much as they could have. Photo credit: alphaspirt.it / Shutterstock.com.*

**Eric Johnson, Senior Technology Editor | Jan 15, 2025, 10:29 AM EST**

Transportation visibility vendors are repositioning their value propositions to shippers as providers of something more than just the data governing the whereabouts of freight, with three different vendors launching adjacent products in the last week alone.

As the pandemic-led boom in investment into a cohort of providers has waned, and as customers sought applications rather than just data from visibility vendors, those providers have branched out into execution- or risk management-based offerings to remain relevant.

This extension into execution is potentially reshaping the visibility market, which has largely relied on vendors partnering with execution-focused software vendors in the transportation, warehouse and inventory management spaces.

On Wednesday, FourKites announced a new suite of control tower products designed to let shippers leverage its visibility data into decisions on areas such as supplier collaboration, purchase orders, yard management and cross-docking.

The products are aimed at not just influencing decision making, but giving shippers a direct path to make those decisions.

“We have the ability to shape the definition of a control tower because that term means different things to different people,” FourKites CEO Matthew Elenjickal said. “We are one of the few providers with a real-time [visibility data] network. The control tower providers don’t have it. But we have to expand beyond transportation.”

FourKites will enable shippers to track not only freight transportation, but orders, inventory and assets through eight specific control towers, he said.

## **New funding for competition**

But FourKites is far from alone in trying to more directly link the value of visibility to adjacent decisions. Overhaul, which focuses on using visibility data to help shippers prevent or recover from cargo theft, last week landed a \$55 million funding round from investors.

“We want to provide a tech engagement that doesn’t slow the process down but allows a shipper or a broker to verify who is there picking up or delivering a load,” Overhaul CEO Barry Conlon said. “Shippers are using our solution as a safety net to continue to use brokers, who don’t always have control or influence over the carrier being used to move their load.”

Conlon said the fresh round of investment will be used to accelerate the company’s use of AI in its products, and to fund acquisitions should the right opportunities arise.

Another visibility vendor, Vizion, in 2024 launched a product called TradeView in conjunction with Dun & Bradstreet that helps shippers monitor shipments from upstream suppliers using Vizion tracking data and D&B’s business information databases.

“There is still a focus on innovation and developing new solutions, but perhaps not at the pace or bloated spending waste there once was,” Vizion CEO Kyle Henderson said.

“This cycle is not like past cycles, because priorities changed due to COVID and then the world changed to being very multi-polar.

“You’ll have more companies working on a wider range of solutions because the world of supply chain and logistics is getting more complex,” he added. “And tech is needed to both manage the complexity and eek out the efficiency gains.”

project44, the largest vendor in the space, has since late 2023 been pushing its Movement product, a platform intended to unify its datasets across transportation modes and global regions to help shippers make better inventory management decisions.

InforNexus, one of the pioneers of cargo visibility, last Friday released its own product aimed at extending the value of tracking data. Its NexTrace product is intended to give shippers visibility on raw materials through to finished goods to help them comply with traceability regulations, especially in the EU.

“This will help our customers to not only meet upcoming regulations like the EU Digital Product Passport but also gain a competitive edge by providing comprehensive data on their products’ journey, composition and sustainability,” Brian Carelli, Infor’s vice president of sustainability and partnerships, said in a statement.

## Failure to launch

The impetus behind all of these moves is, as Elenjickal put it, a sort of aggregate failure from vendors to deliver on the promise of how visibility data could help other supply chain software perform better.

“The market sentiment right now is there’s a lack of value realization around visibility,” he said. “There were a lot of promises made, including by us. But the value from those promises, very few companies have realized it. The ones that have are progressive and have resources and use data in other areas of supply chain, and they’re not afraid to throw people at it.”

Conlon agreed. “There has, unfortunately, been a degrading in the belief of what visibility can bring,” he said. “There have been a lot of false promises that have been made. But we’ve been clear from the beginning. Visibility is not a solution; it’s a data stream. We’ve focused on risk management.”

While Conlon said Overhaul welcomes partnerships with adjacent systems, Elenjickal said FourKites is now charting a course based on the idea that visibility partnerships with transportation management systems (TMSs), warehouse management systems

(WMSs), and enterprise resource planning (ERP) vendors haven't yielded desired results for shippers.

"We always thought that we can be [neutral] and enable our partners to consume the data for our customers," Elenjickal said. "But that hasn't happened. They have other priorities. We cannot be dependent on partners. If we can't do it, someone else will do it."

The intent of the eight control tower products, he said, is to make FourKites more directly accountable to its shipper customers.

"We cannot appease all our partners all the time," Elenjickal said. "We tried to do it for the past 10 years. We're not trying to build a TMS, [an order management system], or a WMS. But we are going to make those systems more efficient, and every customer wants this to happen."

## Partner friendly

On Wednesday, another visibility provider, Shippeo, announced a \$40 million investment aimed at helping it expand its customer base in North America and Asia-Pacific.

Shippeo is taking a more traditional path to growth for its multimodal visibility platform, not eschewing partners or building product extensions, but highlighting its work with TMS or ERP system vendors.

Shippeo said it saw a 40% year-over-year increase in North American customers in 2024, "driven by strategic partnerships with e2open, Google and SAP," the company said in a statement. "As the US visibility market matures, companies are increasingly looking to switch vendors, with data quality concerns being the primary driver."

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