

# Magic Quadrant for Digital Commerce

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Digital commerce platform market revenue grew steadily in 2024, and digital commerce platforms are enhancing their offerings in the areas of AI and agentic commerce. This Magic Quadrant assesses 19 digital commerce vendors to help application leaders make informed choices.

## Strategic Planning Assumption

By 2028, 75% of B2B organizations will complete their highest revenue deals via digital channels.

## Market Definition/Description

Gartner defines digital commerce as the technology that enables customers to purchase goods and services through an interactive and self-service or assisted experience. The platform provides necessary information for customers to make their buying decisions and uses rules and data to present fully priced orders for payment. The commerce product must support interoperability with customer data, product content (e.g., price, availability) and order functionality and data via APIs. Digital commerce is commonly delivered as single or multitenant SaaS, or as single-tenant hosted or managed hosted (PaaS) applications. It could be offered for on-premises implementations in some circumstances.

Digital commerce enables customers to purchase goods and services through an interactive and self-service or assisted experience, providing the necessary information for customers to make buying decisions.

## Mandatory Features

The must-have capabilities for this market include out-of-the-box (OOTB) capability or the APIs to support:

- A self-service, interactive commerce experience that includes storefronts, product catalog navigation, search, product pages, promotions, shopping carts, check-out and customer accounts
- Discovering products, adding products to a cart and fully pricing an order inclusive of product-level, customer-level and order-level discounts or promotions
- Business tooling for site merchandising (including search and navigation), product catalog and content management, user access management, promotions management and site operations and configurations
- Interoperability with customer, product content (including price and availability) and order functionality and data via APIs
- Front end as a service/experience composition
- Personalization, testing and optimization
- Product information, pricing and inventory management and/or integration

## Common Features

Digital commerce may also have the following capabilities:

- B2B-focused capabilities
- API orchestration and management
- Marketplace operations
- Channel integrations
- Content management
- B2B2X
- Basic contact center
- Basic product information management

- Basic OMS
- Basic configure, price and quote
- Basic CDP
- Basic subscriptions management
- Unified retail commerce (e.g., buy online, pickup in store/click and collect, clienteling, ship from store)
- Live commerce
- Sales associate integration
- Visual configuration

(For further information on the extent of the digital commerce ecosystem, see [Evolve Digital Commerce Portfolios by Leveraging the Application Ecosystem](#).)

## Magic Quadrant

**Figure 1: Magic Quadrant for Digital Commerce**





**Gartner**

## Vendor Strengths and Cautions

### Adobe

Adobe is a Leader in this Magic Quadrant. Its Adobe Commerce platform supports on-premises and public cloud deployments and is available on Amazon Web Services (AWS) and Microsoft Azure in all regions except China, where on-premises hosting is required.

Adobe's operations are geographically diversified and its customers tend to be enterprise organizations in the manufacturing and retail industries.

In 2025, Adobe released Adobe Commerce as a Cloud Service and Adobe Commerce Optimizer with native digital asset management and generative image capabilities from Adobe Experience Manager (AEM) Assets, Adobe Firefly and Adobe Express. Its roadmap includes agentic AI experiences and an agent orchestration platform.

### Strengths

- **Product suite synergy:** Adobe delivers integrated experiences across its portfolio, including native connections to AEM Assets, Adobe Firefly and Adobe Express. This enables customers to leverage creative, content and analytics capabilities within a unified ecosystem.
- **Content and store management:** Adobe offers strong content management with AEM and Edge Delivery Services, plus an in-context visual editor for both B2C and B2B scenarios. Adobe Commerce provides robust catalog and marketing features, supporting complex content and storefront requirements for global enterprises.
- **Cloud migration strategy:** Adobe offers migration options for its existing private cloud or managed hosted customers onto its new multitenant SaaS platform, such as incremental migration of extensions via Adobe App Builder, and is actively developing data migration tools and a migration compatibility tool.

### Cautions

- **Agentic AI product lag:** Adobe's commerce-related AI agents are mostly in development, while competitors offer more generally available agentic AI features today.
- **Dual deployment complexity:** Adobe will need to maintain both PaaS and SaaS platforms until customers fully transition to the SaaS environment; currently, there is no end of support communicated for its PaaS/on-premises platform. Customers looking to transition across their platforms should get more information from this vendor regarding different feature availability, support across platforms, and SLAs for receiving critical updates or bug fixes, as resources are split between two fundamentally different infrastructures.
- **Upgrade challenges:** Some customers report difficulty staying current with new releases and express frustration over the cost and complexity to complete upgrades. Customers note that the process is time-consuming and can require substantial planning, testing and development resources. Some note compatibility issues with third-party extensions or

customizations. Adobe is looking to address these issues in its new Commerce as a Cloud service offering.

## **BigCommerce**

BigCommerce is a Challenger in this Magic Quadrant. It is deployed globally as multitenant SaaS on Google Cloud and offers B2B as a fully integrated solution within its core digital commerce platform. In 2025, BigCommerce introduced its new parent company, Commerce, which also offers two other products, Makeswift and Feedonomics.

BigCommerce's operations are focused in North America and Europe. The majority of its customers are retail organizations with gross merchandise value (GMV) of less than \$10 million, but is growing its midmarket and enterprise B2B customer base.

BigCommerce's roadmap includes adding to its GenAI capabilities across its digital commerce platform; adding to its B2B support, like native configure, price and quote (CPQ) capabilities and deep partnership with PROS; extending its Catalyst storefront; and improving its internationalization features.

### *Strengths*

- **Composability:** BigCommerce has a modular, API-first, cloud-native architecture, along with core commerce-focused capabilities, as well as a broad ecosystem. This aligns the vendor with the needs of technically sophisticated prospects looking for flexibility and composing from best-of-breed capabilities.
- **Global availability:** BigCommerce is globally available on Google Cloud , making it useful for customers seeking global or regionally differentiated experiences from the same platform.
- **Multisite:** The product offers good multisite and localization capabilities together with core B2B functionality, making it suitable for businesses operating across different regions, brands or customer segments.

### *Cautions*

- **Market awareness:** Awareness of this vendor remains limited outside its core North America region compared to other leading vendors. Its parent company's recent rebranding as Commerce could increase this awareness gap, specifically in the enterprise segments. Customers considering this vendor for deployments in other regions should

request and verify client references specific to their target region to confirm the vendor's proven capability and support in that market.

- **Complex business model support:** BigCommerce relies on its Feedconomics offering to enable marketplace, additionally it lacks customers using it for their B2B2X use cases. Customers should ask for references who are looking to implement complex use cases for their digital commerce business.
- **Lack of advanced features:** BigCommerce continues to focus on composability and collaboration with independent software vendor (ISV) partners rather than offering a broad range of native platform features, it lacks advanced search, an order management system (OMS) and personalization. Prospects looking for single-vendor end-to-end solutions for more complex use cases may need to consider alternative solutions.

## commercetools

commercetools is a Leader in this Magic Quadrant. Its Composable Commerce Platform is a multitenant SaaS offering available natively on AWS and GCP. Core commerce products include B2B and B2C Commerce, as well as Frontend and InStore, and emerging agentic commerce capabilities that extend functionality across the entire shopping journey.

commercetools serves primarily large global organizations in retail, manufacturing, wholesale, life sciences and healthcare. It has a strong presence in Europe and North America, and a small base in Latin America and Asia/Pacific (APAC).

commercetools launched InStore in January 2025, extending its composable architecture into physical retail to connect digital and in-person experiences through a unified data and check-out layer. The vendor's roadmap builds on the Model Context Protocol (MCP) and Merchant Assistant initiatives, enabling merchants to connect to emerging agentic commerce channels and automate decision flows, and an integrated conversational AI tool.

## Strengths

- **Large enterprise focus:** commercetools' customer base is geared toward large enterprises with annual GMV over \$100 million that operate various product lines in multiple regions. This strategy allows commercetools to tailor its solution to complex, high-volume business needs.
- **Proof of concept (POC) approach:** commercetools offers a 60-day free trial to conduct POCs and trials as a self-service approach, or as a guided POC with a commercetools

solutions engineer. If successful, the POC can be converted to a production-ready environment rapidly.

- **Agentic commerce innovation:** commercetools provides frameworks like MCP and AI Hub, enabling AI agent interactions with other commerce systems and autonomous sales and conversational check-out experiences using external large language model (LLM) platforms.

### Cautions

- **Industry accelerators:** Although commercetools has invested in industry-specific accelerators, they have been developed by implementation partners. Customers must understand the commercial model associated with partner accelerators and how they are managed and supported.
- **Native CMS capability:** commercetools offers a lightweight native CMS that is suitable for brands that do not require an immersive content experience. Customers that require sophisticated CMS capabilities and want to deliver a more immersive experience will need to implement and integrate a third-party CMS platform.
- **Personalization:** commercetools has foundational, rule-based personalization such as customer segmentation, but it lacks native AI capabilities. It relies on third-party applications to enable sophisticated personalization. Customers should determine whether native capabilities are adequate to support personalization objectives.

### Elastic Path

Elastic Path is a Niche Player in this Magic Quadrant. It offers two digital commerce platforms: Self-Managed Commerce and a multitenant SaaS solution called Elastic Path Composable Commerce that is hosted on AWS. The latter is evaluated in this research.

Elastic Path's operations are focused in North America and Europe, and its customers tend to be in the telecommunication and manufacturing industries, ranging in size from enterprises to organizations with online gross merchandise value below \$10 million.

The vendor's roadmap includes an AI shopping assistant, an intelligent workflow engine for B2B use cases and advancements to its personalization capabilities.

### Strengths

- **Product, pricing and promotions management:** Elastic Path's platform offers a strong catalog management tool that supports unlimited catalogs, hierarchies and price books, and a comprehensive promotions builder with decoupled product data, suitable for B2C and B2B merchants.
- **Composable commerce and innovation:** Elastic Path's vision centers on derisking composable commerce and providing architectural freedom while maintaining business usability. It emphasizes the development of modular, API-first packaged business capabilities (PBCs) and preintegrated solutions via the included integration platform as a service (iPaaS), Composer, to accelerate time to value and minimize disruption.
- **Niche customer base in telco and manufacturing:** Elastic Path's commerce customers are growing in the telecommunications and manufacturing verticals, reflecting the vendor's ability to manage complex catalogs (and subcatalogs) and multisite use cases.

#### Cautions

- **Unified retail commerce features:** Elastic Path's platform lacks a comprehensive suite of native unified retail commerce capabilities, such as an in-store clienteling app or full self-service return processing (e.g., return label generation, in-store exchanges). It often requires customization or third-party integrations via Composer.
- **Reliance on integrations for personalization and recommendations:** Key personalization and real-time recommendation functionalities are not native features. The platform relies on integration with third-party systems like a customer data platform (CDP) for browser behavior tracking, AI-driven personalization and recommendations.
- **Limited global deployment support:** Most of Elastic Path's customers, employees and implementation partners are based in North America and some in Europe, and have limited presence in other regions. Customers in other regions should seek validation that this vendor can meet their implementation and platform support needs.

#### HCLSoftware

HCLSoftware is a Niche Player in this Magic Quadrant. HCL Commerce Cloud is deployed on-premises or as a single-tenant SaaS on AWS, GCP and Microsoft Azure.

It supports larger companies in a diverse set of industries, with the most common being retail, manufacturing and high tech. Customers are primarily in North America and EMEA,

with a smaller number in APAC and Latin America.

Over the past year, HCL Commerce has made improvements to its business user tooling and unified commerce experiences. The vendor's roadmap includes infusion of agentic AI capabilities across various commerce capabilities and a generative storefront builder.

### *Strengths*

- **Bundled composability:** The platform offers several bundled applications that are self-contained and modular. Its base license cost includes decoupled storefronts for both B2C and B2B, a CDP, visual page composer, catalog ingestion tool, customer service hub, and a marketplace operation application.
- **Scalability:** The platform can support companies with several thousands of multisites, tens of millions of SKUs and billions of dollars in annual online gross merchandise value.
- **Unified commerce:** The product includes a native clienteling app with extensive capabilities for click and collect, multichannel promotions, multi-inventory management and fulfillment.

### *Cautions*

- **Application ecosystem:** Compared with its direct competitors, HCLSoftware has limited prebuilt integrations, such as for search, product information management (PIM), OMS, CDP and personalization, potentially requiring more time and resources for integrations.
- **Vertical coverage:** Manufacturing and retail are the dominant verticals for HCLSoftware. Customers in other industries may not find as many out-of-the-box features or strong expertise from the vendor.
- **AI capabilities:** HCLSoftware offers extensive rules for functionalities, such as catalog management, search, merchandising and personalization. These all require manual configurations with very little AI or automation capabilities.

### **Infosys Equinox**

Infosys Equinox is a Niche Player in this Magic Quadrant. Infosys Equinox features more than 25 modules independently deployable as multitenant SaaS offerings on any public cloud. It is also available on the AWS and Microsoft Azure marketplaces.

Infosys Equinox's operations are geographically diversified and its customers tend to be large enterprise organizations in the retail, manufacturing, media and telecommunications industries.

During the past year, Infosys Equinox launched new business user tooling for managing microservices. Its future roadmap involves investing in adding capabilities for smart search, an MCP layer and an agent builder.

### *Strengths*

- **End-to-end approach:** Infosys Equinox offers an end-to-end solution for digital commerce including applications, customization, implementation, hosting, operations and support services.
- **Enabling business scale:** Infosys Equinox's customer base, which is geared toward large B2C enterprises, demonstrates the vendor's ability to enable organizations to scale their online business.
- **Modern composable architecture:** Infosys Equinox's API-first, headless architecture provides flexibility for enterprise customers. Modules can be deployed individually or as a complete platform, each with its own back-end tooling, data layer and access control.

### *Cautions*

- **Limited system-integration partners:** Infosys Equinox has limited options for customers seeking to engage with system integrators other than Infosys itself.
- **Limited cross-vertical presence:** Although Infosys Equinox has grown its revenue year over year (YoY), it has onboarded few new customers; most of these are from retail and manufacturing. Nonretail and nonmanufacturing customers should inquire about reference customers and adoption rates in their sector.
- **Advanced personalization costs:** Infosys Equinox offers this capability via its Customer Intelligence Platform, albeit for an extra cost on top of the platform license costs, or via third-party integrations. Customers with advanced personalization requirements should analyze the cost and benefits of the Infosys Equinox platform versus selecting and integrating a third-party solution.

### **Intershop**

Intershop is a Niche Player in this Magic Quadrant. Its Commerce Management platform is globally deployed as single-tenant SaaS on Microsoft Azure. It also offers, at additional cost, a Customer Engagement Center, advanced search and product discovery (Sparque.AI), an integration hub, and a data hub.

Intershop's operations are mostly focused in Europe (with DACH as its core region) and North America, and its customers tend to be relatively small to large B2C and B2B enterprises, with a concentration in manufacturing and wholesale.

In 2022, Intershop acquired Sparque.AI for advanced search and product discovery. In early 2025, it launched a GenAI buyer copilot and an agent for product content generation. Intershop's roadmap includes more AI features, including for localization, business intelligence and a seller copilot.

### *Strengths*

- **AI roadmap:** Intershop has articulated a B2B digital commerce-oriented GenAI vision, with a seller copilot and several agents in development or testing.
- **Customer diversity:** Intershop supports a wide variety of customer industries in both B2C and B2B, with capabilities that can support many verticals and/or multiple business models within the same instance.
- **B2B focus:** Intershop has focused on B2B and is one of few vendors to see the potential of supporting the wider B2B customer portal use case, which initially might focus on nontransactional capabilities such as postsales services and support.

### *Cautions*

- **Market awareness:** Awareness of Intershop remains very limited outside its core DACH region, and the vendor is very rarely seen on shortlists. Customers considering this vendor for deployments in other regions should request and verify client references specific to their target region to confirm the vendor's proven capability and support in that market.
- **Vendor growth:** Intershop has among the smallest revenue numbers in this research, and its sales and marketing remain regional and with a technical focus. This may limit investment for innovation and the broader viability of the vendor for business buyers.
- **Product agility:** Intershop lacks some sophistication in parts of its feature set. Several capabilities are add-ons that some competitors provide natively, such as semantic search

and B2B seller capabilities. A relatively slow release cycle may be limiting market responsiveness and innovation velocity.

## Kibo

Kibo is a Challenger in this Magic Quadrant. Its Composable Commerce platform is deployed as multitenant SaaS and is globally available on AWS or Google Cloud.

Kibo's operations are mostly focused in North America, followed by growing presence in EMEA and APAC. Its customers tend to be enterprise organizations in the retail and distribution industries.

During the past year, Kibo leveraged Google, Vertex AI and LLMs to deliver advanced AI agents that optimize shopper engagement, customer service and merchandising. Kibo also introduced a no-code agent builder. Its roadmap includes more agentic tools and ML-based demand and inventory forecasting capabilities for its unified commerce customers.

### Strengths

- **Agentic AI:** Kibo's Shopper/Buyer, Customer Success and Merchandiser Agents deliver production-ready agentic commerce with LLMs trained in the specific terminology and use cases relevant to supporting the entire customer product discovery workflow and purchasing cycle.
- **Unified commerce:** For B2B, Kibo offers advanced workflows, quoting, contract pricing, electronic data interchange (EDI) management and offline order creation, with seller-assisted assistance through a digital sales room. For B2C, Kibo optimizes store assets and enables connected experiences across digital and physical channels, with clienteling, employee fulfillment, real-time inventory visibility, intelligent order routing and a unified data model.
- **Flexible platform:** Kibo's modular platform, MACH, offers options from microservices to a full platform bundled with unified retail, Kibo OM, Kibo Commerce search and personalization.

### Cautions

- **Regional focus:** Kibo continues to concentrate in its core region of North America, with a growing customer base in Europe and APAC. Global organizations may need to evaluate Kibo's ability to support them beyond these regions.

- **Limited vertical support:** While Kibo has a strong presence in retail and some presence in manufacturing and wholesale trade, prospects outside these industries will need to evaluate Kibo's ability to support their industries and consult with reference customers to assess suitability.
- **Marketplace capabilities:** Kibo does not offer native marketplace operation capabilities such as third-party seller onboarding, multiseller order management or marketplace-specific revenue tracking. Organizations seeking to launch or scale first-party or third-party marketplaces will need a partner. However, Kibo plans to generally release its new Marketplace & Dropship module later in 2025.

## Optimizely

Optimizely is a Niche Player in this Magic Quadrant. It offers Commerce Connect and Configured Commerce, deployed as single-tenant SaaS on Microsoft Azure. Both platforms are available stand-alone or bundled with Optimizely One DXP, alongside PIM, digital asset management (DAM), CMP, CMS, Personalization, Web Experimentation and/or CDP.

Optimizely serves a variety of B2B verticals, including manufacturing, wholesale and distribution. Customers are mostly in North America and Europe, with \$50 million to \$250 million annual online GMV.

Over the past year, Optimizely released a new integration with a payment services orchestration platform and embedded Optimizely Digital Asset Management, a translations module and mobile Flutter app for all its Configured Commerce customers. In addition, commerce customers now have access to Optimizely Opal, a native agent orchestration platform to automate work, gain insights and execute tasks more intelligently.

*Optimizely declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.*

## Strengths

- **Midmarket B2B vision:** Optimizely offers a packaged solution targeted primarily at core B2B verticals for midmarket customers in manufacturing, wholesale and distribution. This targeted approach ensures that customers get features and functionality tailored to their business verticals, enabling faster implementation and reduced complexity.
- **Preconfigured headless options:** Most of Optimizely's commerce customers use its flagship Digital Experience Platform (DXP), as it offers preintegrated capabilities for

headless content management for its React-based storefront. This provides customers a quicker path to go headless without much development effort.

- **User-friendly interface:** Based on reviews on Gartner's peer insights, customers have highlighted the intuitive and easy-to-use interface for administrators, specifically for nontechnical staff members.

## Cautions

- **Growth:** In FY25, Optimizely's Commerce offerings recorded slower growth compared to other vendors in this research. Slow growth may indicate challenges in its go-to-market strategy, lack of awareness outside its core region and low market adoption.
- **Commerce focus:** Optimizely's primary product is its DXP, and its customers primarily use its commerce platforms with DXP. Customers rarely deploy their commerce stand-alone with other DXP solutions.
- **Search:** Based on reviews on Gartner's Peer Insights, customers have concerns with Optimizely's search capabilities, citing lack of sophistication and customizability options. Customers should closely evaluate their requirements against Optimizely's native search capabilities and available plug-ins to other third-party search platforms.

## Oro

Oro is a Niche Player in this Magic Quadrant. Its OroCommerce platform is typically deployed as single-tenant SaaS on Oracle Cloud, but is also available on AWS, Google Cloud and Microsoft Azure as well as on-premises or self-hosted.

Oro's operations are focused in North America and Europe, and its customers tend to be midtier online distribution, manufacturing and wholesale trade organizations.

During the past year, Oro released AI SmartAgent virtual assistant to enhance the B2B buying experience, and OroPay to manage B2B check-out, invoicing, payments and account data in one system. Oro's roadmap includes AI assistants for its back-office users and for generating real-time reporting.

## Strengths

- **Support for complex business models:** Oro supports B2X, B2B2X, marketplace and subscriptions with its multisite architecture, configurable workflows, and enterprise-grade roles with permissions and access controls.

- **Deployment and accessibility:** Oro is deployable using any existing public or private cloud, hybrid or on-premises infrastructure, in addition to its custom OroCloud SaaS/PaaS deployment option. It is available for purchase on four cloud marketplaces: AWS, Google Cloud, Microsoft Azure and Oracle Cloud.
- **Unified B2B sales enablement:** Built-in CRM capabilities, product catalog personalization, content management and invoicing tools allow business users to create personalized digital sales room microsites (per customer, per deal, etc.), supporting unified buyer and sales team collaboration across the quote-to-cash process.

### Cautions

- **Regional focus:** Oro's focus is on its core regions of North America and Europe. Global organizations outside of these regions should evaluate Oro's ability to support them.
- **Release frequency and management:** Oro issues one major release and 12 minor releases per year. Releases are inconsistent across product versions, as not all new features are back-ported to the two previous major versions.
- **Unified retail focus:** Oro does not offer end-to-end unified retail, lacking the productized integrations and ecosystem to deliver at scale. Organizations seeking unified retail may require a partner to assist them in this area.

### Salesforce

Salesforce is a Leader in this Magic Quadrant. Its B2B and B2C platforms run as multitenant SaaS on Salesforce's own data centers, with some modules hosted on AWS.

B2C and B2B Commerce are offered in all geographies except China. Salesforce's customers include midsize and large enterprises across industries and geographies.

In 2024, Salesforce agreed to acquire unstructured data management provider Zoomin. In May 2025, it announced its intent to purchase Informatica for enterprise data management and PIM. In 2025, Salesforce also acquired Regrello, which is a business process automation tool to enhance its Agentforce capabilities. Salesforce's roadmap includes enhanced connectivity to its other cloud offerings.

### Strengths

- **Global reach:** Salesforce supports diverse digital commerce scenarios natively and with its extensive partner network, industry accelerators and unified commerce capabilities

across multiple regions and sectors.

- **Revised packaging:** Editions released in 2024 unite modules under single pricing models, including (depending on the platform and edition) OMS, Data Cloud, POS, loyalty and payments, specifically for retailers who are looking for a single-suite solution.
- **Phased headless modernization:** Customers can adopt progressive web app storefronts one page at a time, enabling a phased migration from legacy interfaces and minimizing rollout risk.

### Cautions

- **Platform divergence:** Although some modules can be shared across platforms, Salesforce still has separate visions for B2B and B2C commerce, without plans to converge the core platforms. B2C Commerce still uses a separate architecture for the core platform.
- **High total cost of ownership (TCO) concerns:** Salesforce Commerce clients consistently express concerns with the high costs of procuring and implementing the platform, prompting them to evaluate other lower cost alternatives.
- **Search capabilities:** Out-of-the-box search lacks vector and semantic search, which drives customers to replace Salesforce's native search with more advanced third-party search providers. Improvements are expected through early 2026.

### Sana Commerce

Sana Commerce is a Niche Player in this Magic Quadrant. Its B2B platform, Sana Commerce Cloud, is deployed as a single-tenant SaaS application on Microsoft Azure.

Sana Commerce primarily serves manufacturers with Microsoft or SAP ERP applications in Europe and North America.

In 2024-2025, the vendor invested in product features to allow customers to use their own product codes when searching, ordering or reordering. It also introduced a guided product-finder feature. Sana Commerce's roadmap includes capabilities around AI-driven recommendations and next best actions for both buyers and sellers, as well as GenAI-driven content generation.

### Strengths

- **B2B sales focus:** Sana Commerce's core strength has been its ERP-first integration approach, with prebuilt native ERP extensions and connectors for real-time data

synchronization. It has shifted toward a B2B sales-function-oriented approach, extending its platform to cover CRM and OMS integrations and wider B2B use cases.

- **ISV integrations:** Sana Commerce supports over 100 prebuilt integrations on its cloud infrastructure, with a dedicated team certifying and updating plug-ins, lowering the risk of such integrations.
- **Stock location availability:** Sana Commerce introduced a feature that integrated with the ERP to show real-time stock availability for a preferred warehouse, useful for complex B2B organizations that distribute stock from multiple, disparate warehouse locations.

## Cautions

- **Implementation partners:** Sana Commerce's implementations are primarily done by its professional services team; it rarely partners with other system integration agencies. Clients seeking to engage with system integrators other than Sana Commerce have limited options.
- **Vertical strategy shift:** Although Sana Commerce has grown commercial revenue YoY, its live customer base has declined, and this is due to its revised focus on manufacturing verticals. B2B customers from other verticals should validate requirements and capabilities roadmaps specific to their industry.
- **AI innovation:** Current AI capabilities are limited to generated product descriptions enabled by a ChatGPT integration. Sana Commerce is exploring AI-driven guided actions to improve performance, but has no roadmap for agentic commerce (MCP capabilities were not communicated).

## SAP

SAP is a Leader in this Magic Quadrant. Its Commerce Cloud platform combines a hybrid single-tenant PaaS environment on Microsoft Azure with multitenant SaaS components for search, merchandising, order management, payments and recommendations.

SAP's operations are geographically diversified and its customers tend to be large global or regional enterprises, often in retail and manufacturing. It is available in most regions on Azure, and through a partner in China. It is not offered in Africa.

In 2024, SAP acquired WalkMe to enhance user adoption and launched B2B Self-Service Portal for nontransactional commerce and enterprise data access. SAP's product roadmap

includes enhancements to the front-end cloud POS solution and expanded AI agents.

## Strengths

- **B2B Self-Service Portal:** The new B2B Self-Service Portal offered for a flat fee, provides an integrated user experience to view orders, download and pay invoices, manage users and permissions, and apply promotions through native ERP connectivity. By supporting nontransactional use cases, this portal serves as an effective onramp for net new B2B commerce customers.
- **Enterprise reach:** SAP's broad functional footprint spans global B2B and B2C processes, supported by strong professional services and partner networks to drive enterprise-scale implementations.
- **Support for business model complexity:** SAP supports complex business needs at scale, such as diverse product types, subscription models, B2B2X models, multisite and multibrand rollouts.

## Cautions

- **Add-on personalization:** Native personalization is not included and requires the purchase of the Intelligent Selling Services add-on. The CDP offering also carries an extra license fee.
- **Upgrade burden:** The platform core remains a versioned single-tenant offering that needs periodic upgrades. Customers report frustration with the end-of-life of storefronts, which can cause extra implementation efforts.
- **Monolithic core:** Despite the decoupled Spartacus storefront and SaaS components, the commerce core retains a largely monolithic architecture, which may limit agility compared with more modular competitors.

## SCAYLE

SCAYLE is a Challenger in this Magic Quadrant. Its Commerce Engine is a modular platform typically deployed as multitenant SaaS on AWS. Core capabilities include advanced promotion management and marketplace operations. Add-on modules include OMS, DAM, PIM, search and product discovery, and an app suite for mobile app development.

SCAYLE's operations are mostly focused in Europe and North America, and its customers tend to be organizations with over \$250 million GMV, primarily in retail, consumer brands

and wholesale.

In 2025, SCAYLE's parent company ABOUT YOU was acquired by the Zalando Group. Its roadmap includes more GenAI tools and agents for administrators, an agent management cockpit, a customer avatar, and enhanced multichannel merchandising tools.

### Strengths

- **Single-vendor solution:** SCAYLE's end-to-end plus enablers (PIM, DAM, OMS, etc.) vision is effective, especially for omnichannel retailers looking for a single-vendor solution that does not limit future composability.
- **Geographical expansion:** Based on its end-to-end solution, SCAYLE has successfully increased growth among online retailers in North America.
- **Ease of deployment:** SCAYLE offers key features to simplify deploying and managing an overall solution, including solid multisite capability, a native CMS, a storefront runtime and some GenAI tools.

### Cautions

- **Narrow focus:** SCAYLE remains focused on retail, particularly fashion. Unified retail relies on integrations for POS capabilities, and return management needs SCAYLE's OMS add-on.
- **Global reach:** SCAYLE has among the lowest overall revenue in this research and a relatively small customer base, and has limited global presence. Enterprise prospects should check its commitment to global reach.
- **B2B features:** Apart from simple wholesale capabilities, SCAYLE lacks core B2B features, such as seller tools, account based management, workflow configuration, punchout and CPQ integration.

### Shopify

Shopify is a Leader in this Magic Quadrant. Its Shopify multitenant platform, sold in tiers (Shopify, Shopify Plus and Shopify Enterprise) runs on Google Cloud. Enterprise customers may choose from B2C, B2B and Payments solutions, and/or include Retail (POS) for an add-on.

Shopify's operations are mainly focused in North America, followed by a growing presence in Europe and APAC. Its customers tend to be midsize (for its Shopify Plus offering) and larger (with its Enterprise offering) organizations in a variety of industries, with a concentration in retail.

Shopify's roadmap includes building on its multientity architecture, advancing its compliance framework to include the U.S. Health Insurance Portability and Accountability Act (HIPAA), more investments in Product Network to connect merchants, and Commerce AI shopping across channels.

### *Strengths*

- **Innovation velocity:** Shopify maintains a strong focus on R&D, spending \$1.7 billion and releasing more than 300 new features annually.
- **Reliability:** Shopify offers an enterprise-grade reliability and scale global infrastructure with more than 300 points of presence, over 40,000 check-out starts per minute, 99.99% uptime and autoscaling.
- **Unified retail commerce:** Unified retail capabilities are included in the core platform for both Shopify Plus and Enterprise customers. These capabilities include inventory transfer; buy online, pickup in store (BOPIS); an associate packing app; split shipping; and unified order view and full inventory visibility without an OMS.

### *Cautions*

- **Limited vertical support:** Shopify offers no productized industry accelerators. Instead, it addresses customers' vertical needs through a combination of specialized solutions, partner accelerators and tailored implementation guidance.
- **Service-level agreements:** SLAs are linked to specific plans (Shopify, Shopify Plus, Shopify Enterprise), rather than offered as add-on upgrades. This can confuse prospects and customers because these plans are mostly technically identical. Customers seeking optimum SLAs must purchase Shopify Enterprise.
- **Multisite complexity:** Shopify's approach to multisite is unique as compared to the usual industry approach. Customers are required to select their approach, such as whether to use its expansion store versus core store capabilities; each would have its advantages and limitations. Customers with multisite needs should carefully evaluate these capabilities.

## Shopware

Shopware is a Visionary in this Magic Quadrant. Shopware 6 commerce cloud is based on the Symfony PHP framework and commercially available as self-hosted, PaaS, or single-tenant or multitenant SaaS on AWS, Google Cloud or Microsoft Azure.

Shopware's operations are mainly focused in Europe, with a growing presence in North America and APAC. Its customers tend to be midsize organizations in a variety of verticals, such as retail, manufacturing and tech.

In 2024, Shopware released Community Hub, an interaction tool for merchants and developers, and a suite of AI capabilities called Shopware AI. Its roadmap includes an AI-driven workflow orchestration engine, a merchant copilot and a signal bridge supporting machine-readable brand narratives.

### Strengths

- **Innovation:** Shopware offers a number of differentiated functionality including 3D image and augmented reality (AR) visualization, a digital sales room, data insights for industry benchmarking, and an upcoming AI-driven workflow orchestration engine that makes digital commerce a center of the ecosystem.
- **Growth:** Shopware is among the fastest-growing vendors in this research in terms of revenue and customer growth. Its app marketplace increased the number of extensions, from 4,000 in 2024 to 6,000 in 2025, indicating a fast-growing partner community.
- **Application ecosystem:** Shopware provides many integrations to ecosystem applications including PIM, OMS, CRM and ERP, has an extensive network of service partners, and offers an app marketplace with several thousands of extensions.

### Cautions

- **Midmarket and regional focus:** Shopware's narrow geographic presence, which is mostly in Europe, and relatively small client size may limit its appeal to large global organizations.
- **Market responsiveness:** The number of Shopware's major production releases per year falls below the market average. It provided one major release for all customers in 2024 and monthly minor releases for its on-premises and PaaS customers.
- **Unified retail commerce and personalization:** Shopware relies on third-party integrations for unified commerce capabilities, such as the ability to split orders across multiple

addresses and ERPs, AI-enabled personalization, and advanced search.

## Spryker

Spryker is a Visionary in this Magic Quadrant. Spryker Cloud Commerce OS is deployed as PaaS with a multitenant SaaS component for application composition platform (ACP), a low-/no-code integration hub. Typically deployed on AWS, it also supports Google Cloud and Microsoft Azure.

Its operations are in Europe and North America, with customers in the retail, manufacturing, and distribution and wholesale verticals.

In the past year, Spryker released a B2B aftersales Self-Service Portal and its Business Intelligence tool, integrated into its back office. It also developed an MCP server for customers to place orders via Anthropic Claude or external LLMs. Its roadmap includes adding LLM and agentic capabilities in the purchase and post-purchase experiences.

### Strengths

- **Support for complex businesses:** Spryker offers a modular architecture with extensibility and upgradability. It provides tools such as Oryx front-end framework and Glue API for integration, and modules such as marketplace operations and a customer self-service portal that enable complex businesses requiring multiple business models and heavy customization.
- **Manufacturing expertise:** Spryker has a large portion of B2B customers in manufacturing, especially automotive. Offerings such as auction, product configuration, IoT-enabled commerce and marketplace operations cater to the needs of manufacturing customers.
- **Self-service portal:** Spryker's new customer self-service portal provides robust features such as asset and file management, service request and scheduling, claims and inquiry handling, product search, and reordering. These capabilities simplify the transition for traditional B2B enterprises to a comprehensive commerce platform.

### Cautions

- **Geographic presence:** Spryker focuses primarily on Europe and North America, where it has the most customers and service partners. It has limited presence and low brand awareness in other regions. Prospects outside of the vendor's main areas of focus should check for operational and implementation support.

- **Growth:** Spryker had slower growth in 2024 than 2023, a result of its focused go-to-market strategy on the manufacturing industry in Europe. Customers in other verticals and geographies should check customer references.
- **Narrow AI focus:** Spryker's AI investment focuses on developer and platform tooling and lacks advanced configuration options and guardrails for back-office and customer-facing agentic actions.

## Virto Commerce

Virto Commerce is a Niche Player in this Magic Quadrant. Its Virto Commerce Innovation Platform is a single-tenant PaaS in Virto Cloud, which is deployed primarily on Microsoft Azure, but customers can also deploy on AWS, GCP, public cloud, private cloud and on-premises.

Virto Commerce's operations are mainly focused in North America, followed by Europe with some presence in APAC. While most of its customers tend to be in manufacturing and distribution organizations with online GMV below \$50 million, Virto Commerce also serves some customers with an online GMV above \$100 million.

In the past year, Virto launched intentSearch, its proprietary search engine; Virto Oz, its headless UI framework; and Virto Guarantee, its professional services business.

### Strengths

- **All inclusive solution:** Virto Commerce includes a marketplace, CMS, DAM, PIM and OMS under one pricing model, making it suitable for organizations looking for an all-inclusive digital commerce solution.
- **Composable vision:** The platform uses an atomic and cloud-native architecture that is fully decoupled and headless, offering several independently deployable PBCs. The platform includes a page builder for headless storefronts, and integrated tools for composition and module creation.
- **Mature AI and generative AI features:** Virto Commerce offers production-ready AI use cases for features such as search intent classification, document processing (converting unstructured files to structured purchase requests), a RAG assistant for customer support and an admin development assistant. Its prebuilt LLM-based AI agents allow customers to bring their own agents.

## Cautions

- **Midtier B2B focus:** The vast majority of Virto Commerce's customers are small to midsize manufacturing and distribution merchants. Organizations with higher online GMV targets should validate existing customer references in their GMV segments.
- **Limited ISV partnerships:** Virto Commerce has fewer ecosystem partners or native integrations than most vendors in this research. Customers will need to rely heavily on its middleware (which is white-labeled from Azure) for integrations or will need to develop custom extensions.
- **Lack of personalization features:** Virto Commerce offers basic personalization features. Organizations looking for more advanced capabilities will need to look for a third-party vendor to fulfill those requirements.

## VTEX

VTEX is a Challenger in this Magic Quadrant. VTEX's Commerce Platform is deployed as multitenant SaaS globally on AWS.

VTEX's operations are mainly focused in Latin America, with a growing presence in North America and Europe, and its customers tend to be SMBs and midsize enterprises in B2C retail and B2B manufacturing.

In 2024, VTEX acquired Newtail for retail media network capability and Weni for customer service capabilities. Its roadmap includes an agent marketplace, MCP capability, agents for business users and developers, and enhancements to its B2B VTEX Sales App for field sales, including more GenAI tools for sellers.

## Strengths

- **B2B and B2C:** VTEX's B2B support has improved by offering comprehensive merchant and buyer capabilities and, alongside its unified commerce capabilities, is a good match for organizations requiring B2C/D2C and B2B from the same platform.
- **Regional expansion:** Outside of its core region of Latin America, VTEX now has roughly equal penetration and system integration partnerships across North America and EMEA, improving its international expansion primarily among midtier customers.
- **Platform upgrades:** An improved admin UI is among VTEX's core improvements. It includes semantic search, a new promotions UI and merchant enhancements, plus a B2B

sales rep portal and GenAI vision.

## Cautions

- **Midtier client base:** Most of VTEX customers, specifically in North America and Europe, are small to midsize online GMV merchants, with a growing presence in the higher segments. Larger online enterprises in these regions should seek other references that match their level of complexity and scale.
- **Vertical emphasis:** Most VTEX customers are in retail or manufacturing, with a small percentage in wholesale. Prospective customers in more specialized verticals should consult reference customers to assess suitability.
- **FastStore maturity:** Some Gartner clients who have been early implementors of VTEX's FastStore toolkit have reported challenges, especially around functional parity with their existing I/O platform. While VTEX continues to mature the platform, customers should validate its features against their requirements.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

- Intershop

### Dropped

- **Liferay** did not meet the criteria this year to offer digital commerce as a stand-alone solution.

## Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner analysts deemed necessary for vendors to satisfy to appear in this Magic Quadrant. To be included, each vendor had to satisfy the following inclusion criteria, defined by Gartner, as of 1 July 2025:

- Vendors must offer a minimum of one digital commerce platform that is actively being sold which meets the product definition and stated functionality.
- The digital commerce platform must be sold as a separate SKU/entity or as an add-on to the core offering (if applicable); in both cases, the vendor should have a clear record of revenue generated and customers actively using the platform.
- The digital commerce platform must support over 70 production customers at the date of submission of this attestation.
- These customers must be using the vendor's actively sold digital commerce platform to support the commerce journey and capabilities as described in the Market Definition.
- Customers who have bought components of the platform, including (but not limited to) OMS, payments or payment services, search, personalization/recommendations, CMS/DXP (or any other experience management tools), PIM (or product experience management tools), iPaaS/orchestration/integration tools, and CPQ only must not be included in this number.
- The digital commerce platform must serve customers in more than one unique industry. To qualify for serving customers in an industry, the platform must have a minimum of 5% of production customers in the industry.
- The digital commerce platform must be used by paying customers in more than one geographic region, as identified in the presurvey. To qualify for serving customers in a geographic region, the platform must earn a minimum of 10% of digital commerce revenue from other regions (or not more than 90% from one region).
- The digital commerce platform customers must not consist of more than one customer that represents more than 10% of the annual recognized digital commerce software revenue.
- Digital commerce software revenue referenced below should only include sales through software licenses (renewals and new), SaaS subscriptions and maintenance/support services. Additional services such as hosting, professional services including consulting

and implementation support, apps sold through marketplaces, and other business operational services should not be included.

Additionally, due to the competitive nature of this segment, vendors had to satisfy one of the following three scenarios for YoY customer growth, revenue growth and total revenue for their digital commerce platforms.

Scenario 1:

- Net new digital commerce platform customers during 2024: More than 10
- Annual recognized digital commerce software revenue in 2024: Equal to or greater than \$28 million
- Growth in annual recognized digital commerce software revenue from 2023 to 2024: Greater than 10%

Scenario 2:

- Net new customers in 2024: More than 7
- Revenue in 2024: Equal to or greater than \$50 million
- Revenue growth from 2023 to 2024: Greater than 5%

Scenario 3:

- Net new customers in 2024: More than 5
- Revenue in 2024: Equal to or greater than \$65 million

The following Gartner definitions inform the preceding inclusion criteria:

- **Digital commerce platform:** A digital commerce platform is the core technology that enables customers to purchase goods and services through an interactive and usually self-service experience. The platform provides the necessary information for customers to make buying decisions, and uses rules and data to present fully priced orders for payment.
- **Digital commerce platform product functionality:** The platform must have OOTB capability to provide, or APIs to support, a self-service, interactive commerce experience that includes storefronts, product catalog navigation, product pages, shopping carts,

check-out and customer accounts. Out of the box, the platform must have the ability to search for a product, add products to a cart, and fully price an order inclusive of product-level, customer-level and order-level discounts or promotions. In some B2B scenarios, this may involve assistance from sales personnel. The platform must support interoperability with customer, product, content and order functionality, and with data via APIs.

- **Production customer:** A production customer is an organization that has purchased the digital commerce platform, has a corresponding contract with that platform's vendor in the name of the buying organization, is live and transactional on the platform, and pays for use of the platform (that is, one production customer equals one production contract).
- **New digital commerce platform customers:** The number of new digital commerce platform customers who have signed a contract during the 2024 calendar year. This is not a YoY growth number, but instead a new customer count number.
- **Annual recognized digital commerce software revenue:** Total revenue exclusively from the sale of licensed software (regardless of deployment model — e.g., on-premises, SaaS) that can be reported for a specific year according to Generally Accepted Accounting Principles (GAAP). For purposes of this Magic Quadrant, annual recognized digital commerce revenue excludes supporting ecosystem applications and services including (but not limited to) OMS, payments or payment services, search, personalization/recommendations, CMS/DXP (or any other Experience Management tools), PIM (or Product experience management tools), iPaaS/orchestration/integration tools, CPQ, etc. Additionally, revenue should not be included if it comes from a parent organization or another business entity within the same parent organization.

## Honorable Mentions

Gartner tracks more than 160 vendors in this market. Nineteen vendors met the inclusion criteria for this Magic Quadrant, but a vendor's exclusion does not necessarily mean that it lacks viability or its products lack viability.

The following three vendors met several, but not all, the inclusion criteria and thus narrowly missed out on Gartner's Magic Quadrant and Critical Capabilities research this year:

- **Baozun** — Baozun offers UNEX 2.0, a multitenant SaaS; and UNEX WEIS, a single-tenant SaaS digital commerce platform. Baozun is based in Shanghai, China. Most of its customers are global consumer brands and tend to use Baozun's digital commerce offerings to expand their digital business in China by integrating with leading

marketplaces such as Tmall and JD.com, as well as local direct-to-consumer (DTC) brand sites and social commerce channels like Douyin (TikTok China) and RedNote. In addition to digital commerce products, Baozun also offers a variety of digital commerce services, such as setting up and managing store operations, digital marketing, customer services, supply chain and logistics.

- **Liferay** — Liferay Commerce is a native module of Liferay DXP, available in multitenant SaaS, platform as a service (PaaS), and self-hosted deployment models. Liferay Commerce focuses on midsize B2B, B2B2X and B2C organizations that are currently using its DXP platform. Add-ons at extra cost include productized connectors, product recommendations, and sales forecasting modules. Liferay Commerce may be particularly suited to organizations seeking to build customer portals with integrated digital commerce due to its established DXP foundation, support for multisite and multivendor use cases, and native low-code application platform (LCAP). Liferay currently offers its commerce module only as part of a DXP subscription, but its near-term roadmap is to offer it as a stand-alone offering.
- **Ultra Commerce** — Ultra Commerce's Composable Commerce platform is a multitenant SaaS digital commerce platform with single-tenant deployments as an option for larger Enterprises. It also offers a separate digital commerce offering for SMB clients. Ultra Commerce is based in Sydney, Australia, but has a strong customer base in North America and a presence in Europe as well, serving both B2C and B2B customers. Ultra Commerce also offers a PIM, a digital experience composition tool (previously known as Deity), order management system, marketplace application, and payment and data orchestration platforms part of its offerings. Ultra Commerce customers tend to be specifically in the retail and B2B commerce verticals and focused on a unified commerce approach for both single-brand and multivendor marketplace solutions.

## Evaluation Criteria

### Ability to Execute

Companies evaluating digital commerce platforms have wide-ranging requirements, depending on their industry, types of product, business and revenue model, sales and marketing strategy and geographic focus, and the type of CX they wish to deliver. Therefore, breadth of product or service functionality, overall viability, sales execution/pricing, and market responsiveness/record remain highly weighted criteria.

Operations is not rated because these are primarily product companies with lower operational differentiation than among services companies.

### Ability to Execute Evaluation Criteria

| <i>Evaluation Criteria</i>   | <i>Weighting</i> |
|------------------------------|------------------|
| Product or Service           | High             |
| Overall Viability            | High             |
| Sales Execution/Pricing      | High             |
| Market Responsiveness/Record | High             |
| Marketing Execution          | High             |
| Customer Experience          | High             |
| Operations                   | Not Rated        |

Source: Gartner (October 2025)

## Completeness of Vision

Digital commerce platform vendors must understand not only the market's evolution, but also their clients' specific needs when it comes to strategy and evolving business models. Innovation is also imperative.

Innovative vendors that demonstrate an understanding of the market in their product strategies and emerging business models demonstrate Completeness of Vision. As a result, market understanding, offering (product) strategy and innovation remain highly weighted criteria. Geographic strategy is weighted lower.

Business model is not rated because the business models are very similar, leading to little differentiation.

### Completeness of Vision Evaluation Criteria

| <i>Evaluation Criteria</i>  | <i>Weighting</i> |
|-----------------------------|------------------|
| Market Understanding        | High             |
| Marketing Strategy          | High             |
| Sales Strategy              | High             |
| Offering (Product) Strategy | High             |
| Business Model              | Not Rated        |
| Vertical/Industry Strategy  | High             |
| Innovation                  | High             |
| Geographic Strategy         | Medium           |

Source: Gartner (October 2025)

## Quadrant Descriptions

### Leaders

Leaders demonstrate the ability to provide a depth and breadth of commerce functionality. They deliver commerce capabilities across multiple industries and business models that can scale up to support large transaction volumes and high levels of digital commerce GMV. They provide sales and support services both directly and through a robust ecosystem of application, service and integration partners.

They also deliver additional application functionality or partnerships with vendors that integrate with their core commerce platform. They innovate, typically by means of technology updates to commerce platforms, new products and product functionality, investments inside and outside core digital commerce platforms, and programs that improve customers' ability to succeed.

Leaders also have financial, technical and organizational viability, and consistently feature in Gartner clients' evaluations of digital commerce vendors. They often set the competitive benchmark against which other vendors measure themselves.

## **Challengers**

Challengers provide commerce functionality that may have a narrower scope in relation to serving the total addressable market than that of Leaders, but execute well against that scope. Challengers may focus on fewer industries, geographies, business models or a GMV segment of customer size.

These vendors are often highly respected. They invest in innovation that is key to their target markets. They use their research and development resources and access to investment, profits and market reputation to grow quickly or attract a new kind of customer.

Challengers often focus on a perceived high-growth sector of the market or have a large established customer base. They often invest heavily in technology to meet the needs of their target customers and have robust feature sets for the customers they serve.

## **Visionaries**

Visionaries demonstrate the ability to disrupt established commerce markets through innovation. They may incorporate new technologies or architectural approaches into their platforms, use creative pricing strategies or focus on a narrow market segment. Conversely, they may also focus on breadth of scope over depth and differentiate in that way.

They often win new customers quickly because they have identified an underserved niche in the market. Visionaries often have modern offerings that have yet to win large numbers of customers and often lack resources compared with larger companies.

They also often have smaller partner networks and act as fast movers. Visionaries are often funded by venture capital or private equity companies, which provide the capital that enables them to invest in technology, sales and marketing resources for continued progress.

## Niche Players

Niche Players address a narrow band of the market, defined by industry, digital commerce GMV, company size, region, technology capability or a combination of these characteristics. They frequently provide cost-effective solutions.

They often target smaller or emerging-market opportunities, or smaller end-user companies. Niche Players often lack geographical or transactional scale; attract a significantly smaller range of technology, implementation or service partners; and offer more narrowly focused products, focusing either on B2C or B2B, but not both equally.

They lack the financial viability of Leaders and Challengers, although they still meet the inclusion criteria. Niche Players are often funded by venture capital or private equity companies, which provide the capital that enables them to invest in technology, sales and marketing resources for continued progress.

## Context

The inclusion criteria for vendors in this Magic Quadrant emphasize annual digital commerce revenue and customer growth. Vendors' financial performance remains important, but we also consider the size of the customer base on which the growth is based. Digital commerce remains a lucrative area for many commerce platforms and ecosystem application vendors. For 2024, we adjusted the growth inclusion threshold for this research upward due to steady growth in the market observed year over year.

The assessment criteria focus on the capabilities essential for future growth, including architectural innovation, visionary strategy and comprehensive functionality. Organizations evaluating digital commerce platforms are prioritizing solutions that enable them to deliver distinctive, engaging and seamless customer experiences across a wide range of channels.

Regardless of their specific approaches, these organizations consistently seek platforms that offer greater flexibility and agility both during initial deployment and in subsequent enhancements. This enables faster time to market, lowers TCO and supports meaningful digital business outcomes. Additionally, buyers recognize the significance of a vendor's ability to cultivate a robust ecosystem of technology and service partners, further enhancing the value of the digital commerce platform.

This is especially true as commerce platforms have evolved to become more modular, serving companies that seek decoupled front ends or architectural approaches that position them for composable commerce (see [Quick Answer: Is Your Organization Ready for Composable Commerce?](#)). The ongoing shift toward composable commerce is driven by the promise of increased agility enabled by modularity even as organizations navigate more complex architectures and contractual relationships. AI further amplifies this agility by streamlining integration, automating processes and enabling rapid adaptation to changing business needs, making composable commerce implementations more flexible and responsive than ever before.

Ultimately, however, every organization's requirements are different. Clients should match their requirements for functionality, industry expertise, technology and cost to the right vendor. Such details may appear in any part of this Magic Quadrant, and might apply to the 160-plus other vendors we track that do not appear in this research. Use the companion [Critical Capabilities for Digital Commerce](#) to evaluate vendors' products by particular functional and nonfunctional criteria.

## Market Overview

The digital commerce platform software market reached \$10.2 billion in software revenue in 2024, representing 14% YoY growth (up from 11.2% in 2023). Businesses continue to scrutinize additional spending on replatforming or entering digital commerce among geopolitical concerns; however, the market is gradually recovering and is expected to continue into next year as well. During our preliminary research, Gartner noticed a significant improvement in software licenses revenue across the digital commerce platform base that resulted in increasing the digital commerce license revenue threshold from \$20 million to \$28 million.

The CRM sector, of which digital commerce is part, is forecast by Gartner to achieve a compound annual growth rate (CAGR) of 14.8% in constant currency for the period 2023 through 2029 (see [Forecast: Enterprise Application Software, Worldwide, 2023-2029, 2Q25 Update](#)). Gartner forecasts a CAGR of 14.3% in constant currency for digital commerce software revenue over the same period.

The digital commerce market is undergoing a profound transformation fueled by rapid technological modernization, AI innovation, shifting consumer expectations, tighter budgets

and growing geopolitical complexities. This evolution is far from incremental; it is fundamentally reshaping how vendors operate, compete and drive growth. Today, digital commerce initiatives are increasingly anchored to well-defined business objectives. Organizations are striving to boost conversion rates and foster customer loyalty, while simultaneously contending with budget constraints and the need to justify investments to executive leadership. As a result, the true measure of any digital commerce solution lies in the clear business value it delivers.

Over the past year, Gartner has observed remarkable progress in AI capabilities across the digital commerce landscape, from elevating customer experiences and streamlining employee workflows to accelerating development and validation cycles for IT teams. Yet, the central challenge persists: effectively measuring and connecting these technological advancements to specific business outcomes. During the evaluation of this Magic Quadrant, Gartner recognized the ability to demonstrate quantifiable business impact as the key differentiator for vendors in an increasingly competitive market. The digital commerce market in 2024-2025 has been more dynamic, competitive, and customer-centric than ever. For vendors, success hinges on their ability to innovate, adapt and put their customer at the center of everything they do.

Another key development observed is the growing emphasis on robust, native content management systems, with many vendors now offering sophisticated CMS capabilities integrated directly into their platforms. This often includes intuitive visual page builders that empower business users to rapidly create and manage content while also serving as the “head” in headless commerce architectures, enabling greater flexibility and faster time to market.

Finally, B2B commerce solutions are steadily evolving, as we see the rise of comprehensive customer portals designed to support the full spectrum of postsales interactions. Over the past year, vendors have increasingly recognized the importance of facilitating end-to-end B2B relationships, going beyond transactional capabilities to include self-service experiences such as service requests, claims management, order tracking and personalized support. These customer portals are emerging as a critical differentiator, enabling businesses to deepen engagement, drive loyalty and deliver seamless support throughout the entire customer life cycle.

## Acronym Key and Glossary Terms

|       |  |
|-------|--|
| AOV   | average order value  |
| API   | application programming interface  |
| AWS   | Amazon Web Services  |
| B2B   | business to business   |
| B2C   | business to consumer   |
| B2B2C | business to business to consumer   |
| B2B2X | business to business to X, where X could be consumers, other businesses, franchises, partners, suppliers or any other entity |
| BOPIS | buy online, pickup in store  |
| CDP   | customer data platform   |
| CMS   | content management system  |
| CPQ   | configure, price and quote   |
| CX    | customer experience  |
| D2C   | direct to consumer   |
| DACH  | Germany, Austria and Switzerland   |
| DAM   | digital asset management   |
| DOM   | distributed order management   |

|       |   |
|-------|---|
| DSR   | digital sales room  |
| DXC   | digital experience composition  |
| DXP   | digital experience platform   |
| FEaaS | front end as a service  |
| GMV   | gross merchandise value   |
| MACH  | “microservices, API-first, cloud-native, headless” — the tagline of the MACH Alliance, an industry body dedicated to promoting this approach. Gartner rephrases this to: “modular, API-first, cloud-native, head-decoupled” |
| MoR   | merchant of record  |
| MXDP  | multiexperience development platform  |
| NLP   | natural language processing   |
| OMS   | order management system   |
| PaaS  | platform as a service   |
| PBC   | packaged business capability within a composable solution   |
| PIM   | product information management  |
| POS   | point of sale   |
| PWA   | progressive web app   |

|      |                           |
|------|---------------------------|
| RFQ  | request for quotation     |
| SaaS | software as a service     |
| SFA  | Salesforce automation     |
| SI   | system integrator         |
| SPA  | single-page application   |
| TCO  | total cost (of) ownership |

## ⊕ Evidence

## ⊕ Evaluation Criteria Definitions

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