



Structured intelligence for
global supply chains.

The Problem

Too many signals, too little structure

“A wealth of information creates a poverty of attention” – Herbert Simon

- Dozens of supplier relationships across high-volatility regions
- Signals exist – but aren't interpreted soon enough
- Incumbent tools deliver: black-box scores, undifferentiated alerts, intransparent causal reasoning
- Gartner (May 2026): alert noise, entity resolution failures, and interpretation complexity

The Market

SCRM intelligence is a rapidly scaling enterprise software category

Gartner (April 2024): five-year CAGR: 16.3%

\$29B (2023) → **\$62B** (2028)

- €50M+ raise Everstream · €27B+ acquisition Refinitiv (2021)
- ~ 9 vendors in MQ · active market consolidation

TAM / SAM / SOM

- TAM ~16.000 EU large manufacturers (>250 employees) x €80K ACV = **€1.28B**
(Eurostat, 2024; ACV inferred – see methodology)
- SAM ~25% with complex multi-region supply chains and active regulatory exposure
= **€320M**
- SOM – 200 customers over 10 years = **€16M ARR** (~1.25% of TAM; benchmarked against comparable platform growth trajectories – see methodology)

Why Now

Regulations are forcing this to become a budget line

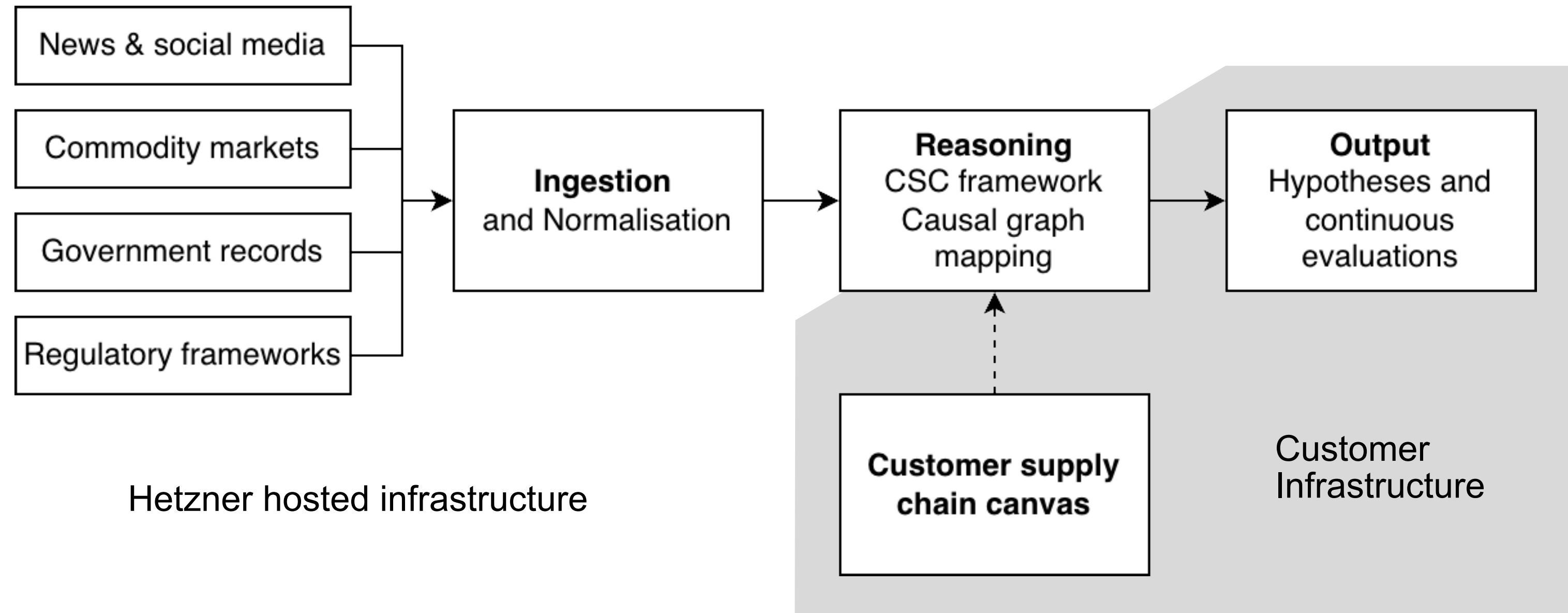
- CSDDD / LkSG → continuous monitoring, documentation, risk-tracing now mandatory
- WEF (Jan 2026): global supply chains have entered an **era of structural volatility**
- WTW (2025): less than 8% of businesses believe they have complete control over their supply chain risks
- WTW (2025): 63% continue to experience higher-than-expected supply chain losses
- Bottom line: Low visibility into supply chain risk is no longer just an operational gap – **under CSDDD/LkSG, it's a legal liability.**

The Solution

Structured event intelligence for supply chain teams

- **Continuous ingestion**: news, social media, commodity markets, regulatory frameworks
- Customer-specific event impact reasoning
- Causal reasoning grounded in CSC; regulations and signals mapped to **continuously evaluated hypotheses**, not verdicts
- No entity resolution failures – **customers map their own network**, not a vendor's best guess
- **EU-sovereignty** by design – supply chain data never leaves the customers environment

Architecture



Competitive Landscape



Gartner MQ (May 2026) · customer review analysis

	Causal reasoning	EU-sovereign	Customisability	Multitier Mapping	ESG depth
Knovolo	✓	✓	✓	◐	×
Altana	◐	◐/×	×	✓	◐
Everstream	×	×	×	◐	◐
Prewave	×	×	◐	✓	✓
Resilinc	×	×	×	✓	◐

Traction / Roadmap

What exists today

- Structured World Awareness architecture complete and documented
- Whitepaper published – knovolo.com/whitepaper.pdf
- CSC paper finalised, publication pending
- Pipeline operational – ingesting and producing events
- EU-sovereign infrastructure designed for Hetzner deployment, migration in progress

Next

- Q3 2026 – pilot with EU manufacturing partner
- CSC paper published
- Formal pre-seed raise to follow pilot validation

The Ask

We're not raising – we're building relationships

We are not raising. Compute costs are modest – what we can't buy is domain expertise and early customer relationships.

- Pilot partners – EU manufacturers willing to validate the intelligence layer ahead of GA
- Domain expertise – advisors with supply chain, procurement, or compliance experience
- Introductions – to procurement leads or investors who should know Knovolo early

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The world is producing signal.
Knovolo builds the structure to read it.