Warehouse Management System Market Forecast to 2030 - COVID-19 Impact and Global Analysis By Component (Hardware, Software, and Services); Tier Type (Advance [Tier 1], Intermediate [Tier 2], and Basic [Tier 3]); Industry (Manufacturing, Automotive, Food and Beverage, Electrical and Electronics, Healthcare, Retail and E-commerce, and Others); and Geography

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Report description:

The warehouse management system market size is expected to grow from US$ 14,517.07 million in 2022 to US$ 51,360.23 million by 2030; it is estimated to register a CAGR of 17.3% from 2023 to 2030.

A warehouse management system can be defined as a software program designed and developed to facilitate the ease of real-time tracking of the location of the goods within a warehouse. This software provides an enhanced potential for handling operations at a warehouse or distribution center. Its critical capabilities comprise stock locating, order receiving, inventory management, order picking, task interleaving, cycle counting, order allocation, labor management, packing, replenishment, and shipping. Over the past couple of years, the warehouse management system market has witnessed tremendous transformation in terms of handling complicated warehouse infrastructures and their total cost of ownership. With the implementation of cloud-based WMS solutions and services, the total cost of ownership has reduced remarkably.

One of the major factors that impact the warehouse management system market growth is a surge in the e-commerce industry. The bolstering sales in e-commerce and the rising demand for efficient solutions to meet the omnichannel fulfillment demands have significantly driven the logistics & warehousing industry. This has further encouraged warehouse management solutions and services providers to improve their offerings in terms of scalability, flexibility, and cost-effectiveness. Moreover, the ability of the warehouse management system to remarkably reduce the paperwork has resulted in a significant reduction in shipping/receiving

process time. This system is designed to provide better accuracy for inventory, lot-tracking capabilities, and improved workflow.

Impact of COVID-19 Pandemic on North America Warehouse Management System Market Growth

The enactment of lockdowns and travel restrictions, the shutdown of production facilities, and the disruption in the supply chain adversely affected major players' performances in North America's warehouse management system market. Notably, the retail and e-commerce industry in the US witnessed the most severe impact of the COVID-19 pandemic in 2020 through labor shortage, suspension, and cancellation of projects. It disrupted supply and logistics, creating a negative short-term impact on the North America warehouse management system market size. However, due to increasing warehouse facilities and growing investments in renovation and replacement of godowns, there is a growing demand for WMS in the region. The market is also driven by the reopening of manufacturing and automotive operations and the ever-increasing number of extensive plans for infrastructure development, creating ample growth opportunities for the warehouse management system market growth.

Warehouse automation has been gaining traction, and COVID-19 accelerated the adoption of WMS. As warehouses cope with adjusting inventory counts, it becomes a crucial factor to make space for work in process (WIP), speeding order delivery, and implementing social distancing. Moreover, automated storage and retrieval systems (ASRS) generally recover up to 85% of existing floor space compared to standard shelving. Warehouses need this additional capacity to meet post-COVID challenges, as ASRS can help warehouses solve labor challenges and manage unpredictable spikes in demand.

North America is segmented into the US, Canada, and Mexico. The US held the largest warehouse management system market share in 2022 and is projected to grow at the highest CAGR during the forecast period. The supply chain industry in North America has been undergoing a dramatic transformation, which is also substantially impacting the fundamentals of distribution and warehousing. Most of these transformations are related to emerging technologies such as automation and cloud services that have plummeted the gap between supply chain operations and customers. According to SAP in October 2022, a survey found that two out of three companies are adopting a "just in case" supply chain instead of a "just in time" supply chain to track large standing inventory. This shift is adopted by companies to meet customer demand on time. This "just in case" supply chain can be efficiently handled by a highly adaptive and scalable warehouse management system. Thus, "just in case" supply chain trend is projected to increase the demand for warehouse management systems.

In 2022, The largest warehouse management system market share was held by the US and is anticipated to maintain its robust growth outlook during the forecast period. The growth of the warehouse management system market in the US is majorly attributed to the rising sophistication and system capabilities of the Verified-Accredited Wholesale Distributors (VAWD) and 3PL. The industry offers great opportunities for high-tech development, particularly to the automotive shippers along with other verticals.

According to Waredock Estonia LLC, the North America warehouse and storage industry grew by 11.5% in 2021. There is a strong rise in warehouse leasing due to the growing e-commerce market. Many local players rely on outsourcing the warehouse and distribution service from logistics players such as DHL, UPS, FedEx, and XPO Logistics. The rapidly transforming e-commerce landscape is also impacting the warehousing market in the US, contributing to the growth of the warehouse management system market in the country.

International Business Machines Corp, SAP SE, Epicor Software Corp, Softeon Inc, Oracle Corp, Panasonic Holdings Corp, Infor Inc, Manhattan Associates Inc, PTC Inc, and Tecsys Inc are among the prominent players operating in the warehouse management system market.

The overall warehouse management system market has been derived using both primary and secondary sources. To begin the warehouse management system market analysis, exhaustive secondary research has been conducted using internal and external

sources to obtain qualitative and quantitative information related to the warehouse management system market. The process also serves the purpose of obtaining an overview and market forecast of the market growth with respect to all market segments. Also, multiple primary interviews with industry participants and commentators have been conducted to validate the data and gain more analytical insights about the topic. Participants of this process include industry experts such as VPs, business development managers, market intelligence managers, national sales managers, and external consultants-such as valuation experts, research analysts, and key opinion leaders-specializing in the warehouse management system market.

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SCOTTS INTERNATIONAL

Warehouse Management System Market Forecast to 2030 - COVID-19 Impact and Global Analysis By Component (Hardware, Software, and Services); Tier Type (Advance [Tier 1], Intermediate [Tier 2], and Basic [Tier 3]); Industry (Manufacturing, Automotive, Food and Beverage, Electrical and Electronics, Healthcare, Retail and E-commerce, and Others); and Geography

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