

Supply Chain Management Software Market Report by Solution Type (Transportation Management System, Warehouse Management System, Supply Chain Planning, Procurement and Sourcing, Manufacturing Execution System), Deployment Mode (On-premises, Cloud-based), Organisation Size (Small and Medium-sized Enterprises, Large Enterprises), Industry Vertical (Retail and Consumer Goods, Healthcare and Pharmaceuticals, Manufacturing, Food and Beverages, Transportation and Logistics, Automotive, and Others), and Region 2024-2032

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Report description:

The global supply chain management software market size reached US\$ 18.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 50.0 Billion by 2032, exhibiting a growth rate (CAGR) of 11.1% during 2024-2032. The growing application in small and medium-sized enterprises (SMEs), increasing adoption in the e-commerce industry, and rising employment in the healthcare sector to manage medical supply distribution represent some of the key factors driving the market.

Rising Development of Industrial-Grade Digital Technology Impelling Market Growth

Organizations around the world are focusing on improving efficiency and reducing maintenance of manufacturing and material handling solutions via the integration of data gathered from connected networking. They are also focusing on enhancing real-time material movement across the supply chain, which is catalyzing the demand for supply chain management software. Furthermore, companies in various sectors are investing heavily in digitizing their business operations and models. This, along with the rising

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trends of Industry 4.0 and Logistics 4.0, is further strengthening the growth of the market.

What is Supply Chain Management Software?

Supply chain management (SCM) software assists in strengthening and managing the end-to-end supply chain processes of organizations. It comprises various subcategories, such as supply chain planning, transportation management system (TMS), warehouse management system (WMS), and manufacturing execution system. It also includes supplier management, order processing, demand forecasting, logistics, warehouse management, collaboration, and security maintenance as standard solutions. It is designed to enhance and strengthen supply chain operations in an organization by maintaining production, inventory, sourcing, transportation, and supervising product demand. It also provides enhanced visibility to businesses with cross-functional access and offers exception-based process management platforms. It delivers considerable advantages to enterprises by improving visibility, increasing efficiency, minimizing costs, and mitigating risks. It also enhances compliance, automates major processes, and assists in decision-making, solving problems, customer services, and communication. SCM software provides a better understanding of buying behavior and preferences, allowing brands and organizations to implement the best customer relationship management (CRM) strategies and deliver real-time performance. Furthermore, it is widely utilized by organizational departments, such as sales and marketing and customer services and support, to improve client experience and develop strong bonds with potential customers.

COVID-19 Impact:

According to the supply chain management software market analysis, the outbreak of COVID-19 caused significant structural changes in the industry. It caused a temporary slowdown in industrial operations, which impacted the overall growth of the supply chain management software market globally. To cope with the pandemic crisis, companies adopted innovative strategies, including work-from-home (WFH) trends, to improve technical support. The demand for supply chain management software during the pandemic experienced a low impact as it can be deployed on-premises as well as on cloud computing technology. However, towards the end of 2020, the crisis of skilled workers diminished, and the demand for supply chain management software increased due to the significant growth of the e-commerce sector.

Supply Chain Management Software Market Trends:

At present, the increasing adoption of SCM software in the e-commerce industry for automation, inventory management, order tracking, and synchronizing operations and vendor relationships represents one of the primary factors propelling the growth of the market. Besides this, the rising demand for cloud-based SCM software to expedite the manufacturing cycle, ensure quality, enhance scalability, and tackle disruption is contributing to the growth of the market. In addition, the growing utilization of SCM software among small and medium-sized enterprises (SMEs) on account of the rapid business expansion, globalized supply chain, and geographically expanded selling destinations is offering a favorable market outlook. Apart from this, the increasing employment of SCM software in the healthcare industry to streamline medical supply distribution and inventory supervision is supporting the growth of the market. Additionally, the rising demand for SCM software in the aviation industry to manage crew, flights, passenger logistics, and aircraft is strengthening the growth of the market.

Key Market Segmentation:

IMARC Group provides an analysis of the key trends in each sub-segment of the global supply chain management software market report, along with forecasts at the global, regional and country level from 2024-2032. Our report has categorized the market based on solution type, deployment mode, organisation size and industry vertical.

Solution Type Insights:

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Transportation Management System
Warehouse Management System
Supply Chain Planning
Procurement and Sourcing
Manufacturing Execution System

The report has provided a detailed breakup and analysis of the supply chain management software market based on the solution type. This includes transportation management system, warehouse management system, supply chain planning, procurement and sourcing, and manufacturing execution system.

According to the report, supply chain planning represented the largest segment as it enhances operational efficiency and enables optimization of the delivery of goods, services, and information from suppliers to customers. In addition, the rising focus on supply chain planning, as it is the forward-looking process of coordinating assets and effective in balancing supply and demand, is propelling the growth of the market. Apart from this, a supply chain planning suite sits on top of a transactional system to provide planning, what-if scenario analysis capabilities, and real-time demand commitments considering constraints.

Additionally, increasing number of manufacturing companies are adopting advanced supply chain planning systems, which is supporting the supply chain management software market growth. Furthermore, the increasing penetration of supply chain planning systems in numerous industry verticals, such as semiconductor, personal care, and food and beverage (F&B), is bolstering the supply chain management software market growth.

Deployment Mode Insights:

On-premises
Cloud-based

A detailed breakup and analysis of the supply chain management software market based on the deployment mode has also been provided in the report. This includes on-premises and cloud-based. According to the report, on-premises accounted for the largest market share as it runs on computers on the premises of organizations rather than at a remote option, such as cloud or server farms. In addition, the rising adoption of on-premises deployments by companies, as they do not require third-party access and provide physical control over the server to the owner, is propelling the growth of the market. Apart from this, the increasing utilization of on-premises supply chain management software among the highly regulated industries wherein the storage of sensitive information in a public cloud environment is not allowed is contributing to the growth of the market.

Additionally, the rising employment of on-premises supply chain management software as an alternative to cloud-based due to abundant amounts of customizations provided to enterprises and enables companies to efficiently utilize their information technology (IT) infrastructure and house staff is supporting the growth of the market. Moreover, the information stored in on-premises supply chain management software is stored locally in the premises of the organizations and under the full supervision of the same, which enables companies to have full control over their own information, and that is considered a decisive advantage, especially when it comes to compliance issues. Furthermore, the storage of information in on-premises supply chain software enables employees to have access to the data with on-premises solutions even when network problems will occur, and the connection to the internet is interrupted, which is bolstering the supply chain management software market growth.

Organization Size Insights:

Small and Medium-sized Enterprises
Large Enterprises

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A detailed breakup and analysis of the supply chain management software market based on the organization size has also been provided in the report. This includes small and medium-sized enterprises and large enterprises. According to the report, large enterprises accounted for the largest market share as the presence of supply chain complexity is comparatively higher than in small and medium-sized enterprises (SMEs), due to which it is hard to access the supply chain networks through a simple spreadsheet or document.

In addition, the rising demand for supply chain management software among large organizations, as it automates much of the physical supply chain process and provides analytics and business intelligence to organize complex processes, is propelling the growth of the market. Apart from this, the rising adoption of supply chain management software among large enterprises due to the expanding consumer and end-consumer demand through supply chains is contributing to the growth of the market. Additionally, the increasing demand for advanced solutions in large organizations to assist in the collection of key business data, such as inventory levels, projected sales numbers, and supplier information from a wide variety of sources, is impelling the supply chain management software market growth.

Besides this, large enterprises are integrating their large volume of supply chain networks in the cloud to augment their speed, accuracy, and value chain scalability, which is bolstering the supply chain management software market growth. Furthermore, according to the supply chain management software report, the rising adoption of SaaS-based supply chain management, as it offers greater control over management procedures, is strengthening the growth of the market.

Industry Vertical Insights:

Retail and Consumer Goods
Healthcare and Pharmaceuticals
Manufacturing
Food and Beverages
Transportation and Logistics
Automotive
Others

A detailed breakup and analysis of the supply chain management software market based on the industry vertical has also been provided in the report. This includes retail and consumer goods, healthcare and pharmaceuticals, manufacturing, food and beverages, transportation and logistics, automotive, and others. According to the report, transportation and logistics accounted for the largest market share as it offers several benefits, including carrier procurement, shipment planning and execution, mode optimization, and freight brokerage.

In addition, the growing implementation of supply chain management solutions in the transportation and logistics industry to optimize the cost of managing several supply chain activities of organizations in a single setup is offering a favorable market outlook. Besides this, the rising adoption of supply chain management software in the transportation and logistics industry, as it includes mechanized route scheduling systems that integrate global positioning system (GPS), digital mapping data, and driving guidelines, is supporting the supply chain management software market growth.

Additionally, the increasing investment by governing agencies of various countries in improving railway transportation systems and upgrading traditional freight infrastructure fares is strengthening the growth of the market. Moreover, the bilateral economic relations between numerous countries have fueled the demand for reliable transportation, which, in turn, is increasing the adoption of supply chain management software.

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Regional Insights:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America (the United States and Canada) was the largest market for supply chain management software. Some of the factors driving the North America supply chain management software market included the growing investment in improving the railway transportation system, rising automation of e-commerce businesses, and increasing modernization of manufacturing and construction industries.

Competitive Landscape:

The report has also provided a comprehensive analysis of the competitive landscape in the global supply chain management software market. Some of the companies covered in the report include:

Blue Yonder Group Inc. (Panasonic Holdings Corporation)

Epicor Software Corporation

Infor Inc. (Koch Industries Inc.)

International Business Machines Corporation

Kinaxis Inc.

Korber AG

Manhattan Associates

Oracle Corporation

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Kindly note that this only represents a partial list of companies, and the complete list has been provided in the report.

Key Questions Answered in This Report

1. What was the size of the global supply chain management software market in 2023?
2. What is the expected growth rate of the global supply chain management software market during 2024-2032?
3. What are the key factors driving the global supply chain management software market?
4. What has been the impact of COVID-19 on the global supply chain management software market?
5. What is the breakup of the global supply chain management software market based on the solution type?
6. What is the breakup of the global supply chain management software market based on the deployment mode?
7. What is the breakup of the global supply chain management software market based on organization size?
8. What is the breakup of the global supply chain management software market based on the industry vertical?
9. What are the key regions in the global supply chain management software market?
10. Who are the key players/companies in the global supply chain management software market?

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