

## **Manufacturing Execution System Market by Deployment Mode (On-premises, Cloud, Hybrid), Application (Production Management, Quality Management, Material and Inventory Management, Maintenance Management, Performance Analysis) - Global Forecast to 2030**

Market Report | 2025-03-26 | 274 pages | MarketsandMarkets

### **AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

### **Report description:**

With a CAGR of 10.1%, the worldwide Manufacturing execution systems market is expected to rise from USD 15.95 billion in 2025 to USD 25.78 billion in 2030. Primary growth drivers are the growing adoption of Industry 4.0, smart factories, and real-time data integration to improve production efficiency. MES solutions automate manufacturing operations by maximizing resource utilization, ensuring regulatory compliance, and enhancing quality control. Increasing demand from the automotive, pharmaceutical, aerospace, and electronics industries continues to drive market growth. In addition, the shift towards cloud-based MES and the integration of AI, IoT, and big data analytics are transforming production management, allowing for increased agility and operational intelligence.

"Services segment to maintain largest market share during the forecast period"

Increasing need for integration, and support services is driving the services segment to hold the largest market share in the Manufacturing Execution Systems (MES) market. With industries betting big on digital transformation and automation, companies are keen to have expert help in rolling out MES solutions and seamlessly integrating them with existing enterprise resource planning (ERP) and industrial automation systems. In addition, cloud-based MES has also led to demand for managed services such as remote monitoring, security, and system optimization. MES services are also significant because regular software updates, training programs, and compliance support play a crucial role. However, as manufacturers continue emphasizing the importance of real-time data analytics, predictive maintenance, and regulatory adherence, the services segment will remain vital for ensuring MES implementation and keeping operations running efficiently across industries.

"On-premises segment to maintain largest market share during the forecast period"

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

The on-premises deployment of Manufacturing Execution Systems (MES) will command a largest market share through the forecast period as it excels in ensuring data security, customization, and real-time operational control. Automotive, aerospace, pharmaceuticals, and food & beverages sectors use on-premises MES for enhanced production monitoring, regulatory adherence, and lower downtime. Compared to cloud-based offerings, on-premises MES provides greater control of vital production data and is, therefore, the most sought-after for industries with high data privacy needs. Moreover, the ability to integrate MES with legacy enterprise systems contributes to its use among large-scale production facilities. Although cloud technology is increasingly being adopted, the requirement for high up-front investment and maintenance costs remains a drawback for some organizations. Nevertheless, industries that prioritize operational efficiency, low latency, and secure data processing continue to favor on-premises MES solutions. As businesses strive to enhance production visibility and optimize resources, on-premises MES is expected to remain a mainstream deployment model in the market.

"Pharmaceutical industry expected to grow at highest CAGR during the forecast period in the Manufacturing execution systems market"

With strict regulatory requirements, a growing need for real-time production monitoring, and a shift towards a more operationally efficient manufacturing sector, the pharmaceutical industry will grow at significant CAGR in the Manufacturing Execution Systems (MES) market. MES solutions in the pharmaceutical manufacturing industry support production process streamlining, compliance with FDA and GMP standards, and traceability across the supply chain. Also these systems provide smooth batch records, automated reporting, and ERP and quality management (QM) system integration. MES now enables process optimization with minimal downtime, ensuring consistent product quality as the adoption of AI, machine learning, and predictive analytics expands. While pharmaceutical companies continue accelerating their digital transformation and Industry 4.0 initiatives, the necessity to use MES for maintaining stringent quality control, slashing waste while minimizing the costs of production will remain higher in demand in the future.

"North America to lead manufacturing execution systems market growth with the second largest share, driven by digital transformation and industrial automation"

North America is anticipated to register the second largest share in the manufacturing execution systems market because of the fast growth in industrial automation, the high level of government encouragement towards digitalization, and the rising uptake of smart manufacturing. The presence of important automobile aerospace and pharmaceutical industries makes North America one of the top market for MES as companies require real-time production control and quality monitoring and compliance tracking. The market is expanding quickly as the region leverages IoT technology, Industry 4.0, and embraces cloud-based MES systems. MES integration with enterprise systems is becoming more seamless due to growing investments in AI-driven analytics and cybersecurity solutions. With its strong technological foundation, North America is set to dominate MES market growth significantly in the coming years.

#### Breakdown of primaries

A variety of executives from key organizations operating in the manufacturing execution systems market were interviewed in-depth, including CEOs, marketing directors, and innovation and technology directors.□

-□By Company Type: Tier 1 -45%, Tier 2 - 30%, and Tier 3 - 25%

-□By Designation: C-level Executives - 35%, Directors - 45%, and Others - 20%

-□By Region: North America - 30%, Europe - 25%, Asia Pacific - 35%, and RoW - 10%

Major players profiled in this report are as follows: Siemens (Germany), Dassault Systemes (France), SAP SE (Germany), Rockwell Automation (US), Honeywell International Inc. (US) and others. These leading companies possess a wide portfolio of products, establishing a prominent presence in established as well as emerging markets.

The study provides a detailed competitive analysis of these key players in the manufacturing execution systems market, presenting their company profiles, most recent developments, and key market strategies.

#### Key Market Players

Key players operating in manufacturing execution systems market are as follows:

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1. Siemens (Germany)
2. Dassault Systemes (France)
3. SAP SE (Germany)
4. Rockwell Automation (US)
5. Honeywell International Inc.(US)
6. ABB (Switzerland)
7. Applied Materials (US)
8. Emerson Electric Co. (US)
9. GE Vernova (US)
10. Oracle (US)
11. Schneider Electric (France)
12. Korber AG (Germany)
13. Yokogawa Electric Corporation (Japan)
14. Aptean (Georgia)
15. Epicor Software Corporation (US)
16. Infor (US)
17. 42Q (US)
18. Aegis Industrial Software Corporation (UK)
19. Cerexio (Singapore)
20. Critical Manufacturing SA (Portugal )
21. Eyelit (US)
22. iBase-t (US)
23. MPDV (Germany)
24. Parsec Automation, LLC (US)
25. Tebis Technische Informationssysteme AG (Germany)
26. Throughput Consulting Inc.(US)
27. FORCAM ENISCO GmbH (Germany)
28. Miracom, Inc. (South Korea)
29. Andea (Poland)
30. MasterControl Solutions, Inc. (US)

#### Study Coverage

In this report, the manufacturing execution systems market has been segmented based on offering, deployment mode, application, industry and region. The offering segment consists of software and services. The deployment mode segment includes on-premises, cloud, and hybrid. The application segment consists of production management, quality management, material and inventory management, maintenance management and performance analysis. The industry segment comprises food & beverages, oil & gas, chemicals, pharmaceuticals & life sciences, automotive, aerospace, medical devices, electronics & semiconductor, metals & mining, other industries. The market has been segmented into four regions-North America, Asia Pacific, Europe, and RoW.

#### Key Benefits of Buying the Report

- Analysis of key drivers (rising population growth to fuel the need for connected supply chains and mass production in manufacturing, integration of information technology (IT) and operational technology (OT) systems, rising demand for industrial automation across industries, rising regulatory pressure related to safety and quality of manufacturing processes and products, rising emphasis on operational efficiency, growing complexity of manufacturing processes), restraints (high costs associated with upgrades and maintenance, MES integration complexities), opportunities (MES integration with ERP and PLM solutions,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

implementation of MES in the pharmaceutical and life sciences industries, MES solutions require customization to address the diverse demands of different industries, and rising implementation of MES in SMEs), and challenges (complexities associated in deployment of MES in various industries and data security concerns associated with MES) influencing the growth of the manufacturing execution systems market.

-□Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product launches in the manufacturing execution systems market.

-□Market Development: Comprehensive information about lucrative markets - the report analyses the manufacturing execution systems market across varied regions.

-□Market Diversification: Exhaustive information about new products/services, untapped geographies, recent developments, and investments in the manufacturing execution systems market.

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Siemens (Germany), Dassault Systemes (France), SAP SE (Germany), Rockwell Automation (US), Honeywell International Inc. (US) and others.

## **Table of Contents:**

|   |    |
|---|----|
| 1□INTRODUCTION□   | 26 |
| 1.1□STUDY OBJECTIVES□   | 26 |
| 1.2□MARKET DEFINITION□  | 26 |
| 1.3□STUDY SCOPE□  | 27 |
| 1.3.1□MARKETS COVERED AND REGIONAL SCOPE□   | 27 |
| 1.3.2□INCLUSIONS AND EXCLUSIONS□  | 28 |
| 1.3.3□YEARS CONSIDERED□   | 28 |
| 1.4□CURRENCY CONSIDERED□  | 29 |
| 1.5□LIMITATIONS□  | 29 |
| 1.6□STAKEHOLDERS□   | 29 |
| 1.7□SUMMARY OF CHANGES□   | 30 |
| 2□RESEARCH METHODOLOGY□   | 31 |
| 2.1□RESEARCH DATA□  | 31 |
| 2.1.1□SECONDARY AND PRIMARY RESEARCH□   | 32 |
| 2.1.2□SECONDARY DATA□   | 34 |
| 2.1.2.1□List of key secondary sources□  | 34 |
| 2.1.2.2□Key data from secondary sources□  | 34 |
| 2.1.3□PRIMARY DATA□   | 35 |
| 2.1.3.1□List of primary interview participants□                                   | 35 |
| 2.1.3.2□Key data from primary sources□  | 36 |
| 2.1.3.3□Key industry insights□  | 36 |
| 2.1.3.4□Breakdown of primaries□   | 37 |
| 2.2□MARKET SIZE ESTIMATION METHODOLOGY□   | 37 |
| 2.2.1□BOTTOM-UP APPROACH□   | 37 |
| 2.2.1.1□Approach to arrive at market size using bottom-up analysis (demand side)□ | 37 |
| 2.2.2□TOP-DOWN APPROACH□  | 38 |
| 2.2.2.1□Approach to arrive at market size using top-down analysis                 |    |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

|               |  |
|---------------|--|
| (supply side) | 39   |
| 2.3           | MARKET BREAKDOWN AND DATA TRIANGULATION  |
| 2.4           | RESEARCH ASSUMPTIONS   |
| 2.5           | RESEARCH LIMITATIONS   |
| 2.6           | RISK ANALYSIS  |
| 3             | EXECUTIVE SUMMARY  |
| ?             |  |
| 4             | PREMIUM INSIGHTS   |
| 4.1           | ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN MANUFACTURING EXECUTION SYSTEMS MARKET             |
| 4.2           | MANUFACTURING EXECUTION SYSTEMS MARKET, BY OFFERING  |
| 4.3           | MANUFACTURING EXECUTION SYSTEMS MARKET, BY INDUSTRY  |
| 4.4           | MANUFACTURING EXECUTION SYSTEMS MARKET IN NORTH AMERICA, BY INDUSTRY AND COUNTRY           |
| 4.5           | MANUFACTURING EXECUTION SYSTEMS MARKET, BY COUNTRY   |
| 5             | MARKET OVERVIEW  |
| 5.1           | INTRODUCTION   |
| 5.2           | MARKET DYNAMICS  |
| 5.2.1         | DRIVERS  |
| 5.2.1.1       | Increasing demand for connected supply chains  |
| 5.2.1.2       | Rising integration of information technology (IT) with operational technology (OT) systems |
| 5.2.1.3       | Mounting demand for industrial automation solutions  |
| 5.2.1.4       | Growing focus on adherence to strict regulations related to safety and quality             |
| 5.2.1.5       | Rising emphasis on operational efficiency  |
| 5.2.1.6       | Growing complexity of manufacturing processes  |
| 5.2.2         | RESTRAINTS   |
| 5.2.2.1       | High costs associated with MES upgrades and maintenance                                    |
| 5.2.2.2       | Customization and integration issues   |
| 5.2.3         | OPPORTUNITIES  |
| 5.2.3.1       | Rising adoption of ERP and PLM solutions   |
| 5.2.3.2       | Increasing need for regulatory compliance in pharmaceuticals & life sciences industry      |
| 5.2.3.3       | Rising development of scalable and cost-effective solutions for SMEs                       |
| 5.2.4         | CHALLENGES   |
| 5.2.4.1       | Complexities associated with deployment of MES in various industries                       |
| 5.2.4.2       | Data security concerns   |
| 5.3           | TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS   |
| 5.4           | PRICING ANALYSIS   |
| 5.4.1         | INDICATIVE PRICING OF KEY PLAYERS, BY OFFERING, 2024                                       |
| 5.4.2         | AVERAGE SELLING PRICE TREND OF MES SOFTWARE SUBSCRIPTIONS, BY OFFERING, 2021-2024          |
| 5.4.3         | AVERAGE SELLING PRICE TREND OF MES SOFTWARE SUBSCRIPTIONS, BY REGION, 2021-2024            |
| 5.5           | VALUE CHAIN ANALYSIS   |
| 5.6           | ECOSYSTEM ANALYSIS   |
| 5.7           | INVESTMENT AND FUNDING SCENARIO  |
| 5.8           | TECHNOLOGY ANALYSIS  |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

|            |   |    |
|------------|---|----|
| 5.8.1      | KEY TECHNOLOGIES  | 64 |
| 5.8.1.1    | Internet of Things (IoT)  | 64 |
| 5.8.1.2    | Artificial intelligence (AI)  | 65 |
| 5.8.2      | COMPLEMENTARY TECHNOLOGIES  | 65 |
| 5.8.2.1    | Predictive maintenance  | 65 |
| 5.8.2.2    | Big data analytics  | 65 |
| 5.8.3      | ADJACENT TECHNOLOGIES   | 66 |
| 5.8.3.1    | Digital twin  | 66 |
| 5.9        | PATENT ANALYSIS   | 66 |
| 5.10       | TRADE ANALYSIS  | 69 |
| 5.10.1     | IMPORT SCENARIO (HS CODE 903289)  | 69 |
| 5.10.2     | EXPORT SCENARIO (HS CODE 903289)  | 70 |
| 5.11       | KEY CONFERENCES AND EVENTS, 2025-2026   | 71 |
| 5.12       | CASE STUDY  | 72 |
| 5.12.1     | AGC PHARMA CHEMICALS ADOPTS SIEMENS' MES SOLUTIONS TO AUTOMATE PRODUCTION AND ACHIEVE PAPERLESS MANUFACTURING           | 72 |
| 5.12.2     | SAFRAN CERAMICS IMPLEMENTS CT INFODREAM'S MES SOFTWARE TO MONITOR PRODUCTION AND DIGITIZE MANUFACTURING                 | 72 |
| 5.12.3     | LONZA LEVERAGES ROCKWELL AUTOMATION'S FACTORYTALK PRODUCTIONCENTRE MES SOLUTION TO IMPROVE COMPLIANCE AND REDUCE ERRORS | 72 |
| 5.12.4     | SHILOH INDUSTRIES USES PLEX SYSTEMS' MES SOLUTION TO UNIFY OPERATIONS IN FACILITIES                                     | 73 |
| 5.13       | REGULATORY LANDSCAPE  | 73 |
| 5.13.1     | REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS   | 73 |
| 5.13.2     | STANDARDS   | 75 |
| 5.14       | PORTER'S FIVE FORCES ANALYSIS   | 76 |
| 5.14.1     | BARGAINING POWER OF SUPPLIERS   | 77 |
| 5.14.2     | BARGAINING POWER OF BUYERS  | 77 |
| 5.14.3     | THREAT OF NEW ENTRANTS  | 78 |
| 5.14.4     | THREAT OF SUBSTITUTES   | 78 |
| 5.14.5     | INTENSITY OF COMPETITIVE RIVALRY  | 78 |
| 5.15       | KEY STAKEHOLDERS AND BUYING CRITERIA  | 78 |
| 5.15.1     | KEY STAKEHOLDERS IN BUYING PROCESS  | 78 |
| 5.15.2     | BUYING CRITERIA   | 79 |
| 5.16       | IMPACT OF AI/GEN AI ON MANUFACTURING EXECUTION SYSTEMS MARKET   | 80 |
| 5.16.1     | INTRODUCTION  | 80 |
| 5.16.2     | IMPACT OF AI/GEN AI ON MANUFACTURING EXECUTION SYSTEMS MARKET   | 80 |
| 5.16.2.1   | Impact of AI/Gen AI on key end-use industries   | 80 |
| 5.16.2.1.1 | Pharmaceuticals   | 80 |
| 5.16.2.1.2 | Automotive  | 80 |
| 5.16.2.2   | Use cases   | 81 |
| 5.16.2.3   | Future of AI/Gen AI in MES ecosystem  | 81 |
| 6          | APPLICATIONS OF MANUFACTURING EXECUTION SYSTEMS   | 82 |
| 6.1        | INTRODUCTION  | 82 |
| 6.2        | PRODUCTION MANAGEMENT   | 82 |
| 6.3        | QUALITY MANAGEMENT  | 82 |
| 6.4        | MATERIAL AND INVENTORY MANAGEMENT   | 82 |
| 6.5        | MAINTENANCE MANAGEMENT  | 82 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

|        |  |     |
|--------|--|-----|
| 6.6    | PERFORMANCE ANALYSIS   | 83  |
| 7      | MANUFACTURING EXECUTION SYSTEMS MARKET, BY OFFERING  | 84  |
| 7.1    | INTRODUCTION   | 85  |
| 7.2    | SOFTWARE   | 86  |
| 7.2.1  | ABILITY TO LIMIT MANUAL WORK AND REDUCE ERRORS TO ACCELERATE SEGMENTAL GROWTH                                    | 86  |
| 7.3    | SERVICES   | 88  |
| 7.3.1  | NEED FOR ROUTINE BUSINESS MAINTENANCE AND UPGRADATION TO CONTRIBUTE TO SEGMENTAL GROWTH                          | 88  |
| 7.3.2  | IMPLEMENTATION   | 89  |
| 7.3.3  | UPGRADATION  | 90  |
| 7.3.4  | TRAINING   | 90  |
| 7.3.5  | MAINTENANCE  | 90  |
| 8      | MANUFACTURING EXECUTION SYSTEMS MARKET, BY DEPLOYMENT MODE   | 91  |
| 8.1    | INTRODUCTION   | 92  |
| 8.2    | ON-PREMISES  | 94  |
| 8.2.1  | EMPHASIS ON ENHANCING SECURITY CONTROL THROUGH IN-HOUSE CONFIGURATIONS TO FUEL SEGMENTAL GROWTH                  | 94  |
| 8.3    | CLOUD  | 96  |
| 8.3.1  | COST-EFFICIENCY AND RELIABILITY IN TERMS OF DATA RECOVERY TO DRIVE MARKET  | 96  |
| 8.4    | HYBRID   | 98  |
| 8.4.1  | ENHANCED OPERATIONAL EFFICIENCY THROUGH INTEGRATED INFRASTRUCTURE TO FOSTER SEGMENTAL GROWTH                     | 98  |
| 9      | MANUFACTURING EXECUTION SYSTEMS MARKET, BY INDUSTRY  | 100 |
| 9.1    | INTRODUCTION   | 101 |
| 9.2    | FOOD & BEVERAGES   | 103 |
| 9.2.1  | RISING NEED TO ENSURE PRECISE INGREDIENT CONTROL AND ADHERENCE TO STRICT REGULATIONS TO DRIVE MARKET             | 103 |
| 9.3    | OIL & GAS  | 106 |
| 9.3.1  | INCREASING FOCUS ON MAINTAINING PRODUCT RELIABILITY AND ENSURING EMPLOYEE SAFETY TO FUEL SEGMENTAL GROWTH        | 106 |
| 9.4    | CHEMICALS  | 109 |
| 9.4.1  | GROWING EMPHASIS ON MAINTAINING OPERATIONAL TRANSPARENCY AND EFFICIENCY TO AUGMENT SEGMENTAL GROWTH              | 109 |
| 9.5    | PHARMACEUTICALS & LIFE SCIENCES  | 111 |
| 9.5.1  | INCREASING REQUIREMENT FOR IMPROVED DATA SECURITY AND EFFECTIVE REGULATORY COMPLIANCE TO FOSTER SEGMENTAL GROWTH | 111 |
| 9.6    | AUTOMOTIVE   | 113 |
| 9.6.1  | RISING FOCUS ON STANDARDIZATION OF MANUFACTURING PROCESS TO CONTRIBUTE TO SEGMENTAL GROWTH                       | 113 |
| 9.7    | AEROSPACE  | 116 |
| 9.7.1  | GROWING EMPHASIS ON SHORTENING PRODUCTION CYCLES AND ENHANCING PRODUCT QUALITY TO BOOST SEGMENTAL GROWTH         | 116 |
| 9.8    | MEDICAL DEVICES  | 118 |
| 9.8.1  | INCREASING NEED TO MAINTAIN HYGIENE AND QUALITY TO CONTRIBUTE TO SEGMENTAL GROWTH                                | 118 |
| 9.9    | ELECTRONICS & SEMICONDUCTOR  | 120 |
| 9.9.1  | RISING IMPLEMENTATION OF STRINGENT QUALITY STANDARDS AND COMPLEX SUPPLY CHAINS TO FUEL SEGMENTAL GROWTH          | 120 |
| 9.10   | METALS & MINING  | 123 |
| 9.10.1 | GROWING FOCUS ON OPTIMIZING LOGISTICS AND TRACKING INVENTORY LEVELS TO AUGMENT SEGMENTAL GROWTH                  | 123 |
| 9.11   | OTHER INDUSTRIES   | 125 |
| 10     | MANUFACTURING EXECUTION SYSTEMS MARKET, BY REGION  | 128 |
| 10.1   | INTRODUCTION   | 129 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

|          |  |     |
|----------|--|-----|
| 10.2     | NORTH AMERICA  | 131 |
| 10.2.1   | MACROECONOMIC OUTLOOK FOR NORTH AMERICA  | 131 |
| 10.2.2   | US   | 136 |
| 10.2.2.1 | Rising adoption of Industry 4.0 and smart manufacturing initiatives to drive market                      | 136 |
| 10.2.3   | CANADA   | 138 |
| 10.2.3.1 | Rapid digitalization due to shortage of skilled labor to contribute to market growth                     | 138 |
| 10.2.4   | MEXICO   | 139 |
| 10.2.4.1 | Thriving manufacturing sector and industrial automation to boost market growth                           | 139 |
| 10.3     | EUROPE   | 141 |
| 10.3.1   | MACROECONOMIC OUTLOOK FOR EUROPE   | 141 |
| 10.3.2   | UK   | 146 |
| 10.3.2.1 | Burgeoning demand for autonomous vehicles and efficient manufacturing processes to augment market growth | 146 |
| 10.3.3   | GERMANY  | 147 |
| 10.3.3.1 | Increasing digitization and automation of manufacturing processes to foster market growth                | 147 |
| 10.3.4   | FRANCE   | 149 |
| 10.3.4.1 | Rising popularity of low-emission autonomous vehicles to bolster market growth                           | 149 |
| 10.3.5   | ITALY  | 150 |
| 10.3.5.1 | Rapid expansion of industrial facilities to offer lucrative opportunities                                | 150 |
| 10.3.6   | SPAIN  | 152 |
| 10.3.6.1 | Increasing focus on smart manufacturing and industrial digitalization to contribute to market growth     | 152 |
| 10.3.7   | NETHERLANDS  | 153 |
| 10.3.7.1 | Rising need for predictive analytics and automation in industries to spur demand                         | 153 |
| 10.3.8   | SWITZERLAND  | 155 |
| 10.3.8.1 | Growing emphasis on precision manufacturing to drive market  | 155 |
| 10.3.9   | NORDICS  | 156 |
| 10.3.9.1 | Increasing need to support real-time monitoring and predictive maintenance to accelerate market growth   | 156 |
| 10.3.10  | REST OF EUROPE   | 158 |
| 10.4     | ASIA PACIFIC   | 160 |
| 10.4.1   | MACROECONOMIC OUTLOOK FOR ASIA PACIFIC   | 160 |
| 10.4.2   | CHINA  | 165 |
| 10.4.2.1 | Mounting production and manufacturing of automobiles to facilitate market growth                         | 165 |
| 10.4.3   | JAPAN  | 166 |
| 10.4.3.1 | Thriving industrial and manufacturing sectors to foster market growth                                    | 166 |
| 10.4.4   | INDIA  | 168 |
| 10.4.4.1 | Rapid industrialization and adoption of advanced technologies to boost market growth                     | 168 |
| 10.4.5   | SOUTH KOREA  | 170 |
| 10.4.5.1 | Mounting production of automobiles and electronic products to fuel market growth                         | 170 |
| 10.4.6   | SINGAPORE  | 171 |
| 10.4.6.1 | Rising initiatives to support port automation and smart warehouses to drive market                       | 171 |
| 10.4.7   | MALAYSIA   | 173 |
| 10.4.7.1 | Increasing export of electrical and electronics products to fuel market growth                           | 173 |
| 10.4.8   | INDONESIA  | 174 |
| 10.4.8.1 | Rapid industrial growth and digital transformation to foster market growth                               | 174 |
| 10.4.9   | REST OF ASIA PACIFIC   | 176 |
| 10.5     | ROW  | 177 |
| 10.5.1   | MACROECONOMIC OUTLOOK FOR ROW  | 178 |
| 10.5.2   | MIDDLE EAST  | 181 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|            |   |     |
|------------|---|-----|
| 10.5.2.1   | Bahrain   | 183 |
| 10.5.2.1.1 | Increasing investment in smart manufacturing technologies to drive market                         | 183 |
| 10.5.2.2   | Kuwait  | 183 |
| 10.5.2.2.1 | Rising implementation of smart factories to augment market growth                                 | 183 |
|            | ?   |     |
| 10.5.2.3   | Oman  | 183 |
| 10.5.2.3.1 | Growing investment in advanced manufacturing technologies to boost market growth                  | 183 |
| 10.5.2.4   | Qatar   | 184 |
| 10.5.2.4.1 | Rising emphasis on industrial automation and economic diversification to accelerate market growth | 184 |
| 10.5.2.5   | Saudi Arabia  | 184 |
| 10.5.2.5.1 | Increasing focus on smart manufacturing to contribute to market growth                            | 184 |
| 10.5.2.6   | UAE   | 184 |
| 10.5.2.6.1 | Rapid digital transformation and smart factory initiatives to fuel market growth                  | 184 |
| 10.5.2.7   | Rest of Middle East   | 185 |
| 10.5.3     | SOUTH AMERICA   | 185 |
| 10.5.3.1   | Brazil  | 187 |
| 10.5.3.1.1 | Booming automotive, food & beverages, and oil & gas industries to drive market                    | 187 |
| 10.5.3.2   | Argentina   | 187 |
| 10.5.3.2.1 | Growing focus on modernizing manufacturing facilities to boost market growth                      | 187 |
| 10.5.3.3   | Other South American countries  | 187 |
| 10.5.4     | AFRICA  | 188 |
| 10.5.4.1   | South Africa  | 190 |
| 10.5.4.1.1 | Rising emphasis on real-time tracking and predictive maintenance in industries to spur demand     | 190 |
| 10.5.4.2   | Other African countries   | 190 |
| 11         | COMPETITIVE LANDSCAPE   | 191 |
| 11.1       | INTRODUCTION  | 191 |
| 11.2       | KEY PLAYER STRATEGIES/RIGHT TO WIN, JANUARY 2021-DECEMBER 2024                                    | 191 |
| 11.3       | REVENUE ANALYSIS, 2019-2023   | 193 |
| 11.4       | MARKET SHARE ANALYSIS, 2024   | 194 |
| 11.5       | COMPANY VALUATION AND FINANCIAL METRICS   | 196 |
| 11.6       | PRODUCT COMPARISON  | 197 |
| 11.7       | COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024  | 197 |
| 11.7.1     | STARS   | 197 |
| 11.7.2     | EMERGING LEADERS  | 197 |
| 11.7.3     | PERVASIVE PLAYERS   | 198 |
| 11.7.4     | PARTICIPANTS  | 198 |
| 11.7.5     | COMPANY FOOTPRINT: KEY PLAYERS, 2024  | 199 |
| 11.7.5.1   | Company footprint   | 199 |
| 11.7.5.2   | Region footprint  | 200 |
| 11.7.5.3   | Offering footprint  | 201 |
|            | ?   |     |
| 11.7.5.4   | Deployment mode footprint   | 202 |
| 11.7.5.5   | Industry footprint  | 203 |
| 11.8       | COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024  | 204 |
| 11.8.1     | PROGRESSIVE COMPANIES   | 204 |
| 11.8.2     | RESPONSIVE COMPANIES  | 204 |
| 11.8.3     | DYNAMIC COMPANIES   | 205 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|            |   |     |
|------------|---|-----|
| 11.8.4     | STARTING BLOCKS                               | 205 |
| 11.8.5     | COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024 | 206 |
| 11.8.5.1   | Detailed list of key startups/SMES            | 206 |
| 11.8.5.2   | Competitive benchmarking of key startups/SMES | 206 |
| 11.9       | COMPETITIVE SCENARIO                          | 207 |
| 11.9.1     | PRODUCT LAUNCHES                              | 207 |
| 11.9.2     | DEALS   | 209 |
| 12         | COMPANY PROFILES                              | 211 |
| 12.1       | KEY PLAYERS                                   | 211 |
| 12.1.1     | SIEMENS                                       | 211 |
| 12.1.1.1   | Business overview                             | 211 |
| 12.1.1.2   | Products/Solutions/Services offered           | 213 |
| 12.1.1.3   | Recent developments                           | 214 |
| 12.1.1.3.1 | Product launches                              | 214 |
| 12.1.1.3.2 | Deals   | 215 |
| 12.1.1.4   | MnM view                                      | 216 |
| 12.1.1.4.1 | Key strengths/Right to win                    | 216 |
| 12.1.1.4.2 | Strategic choices                             | 216 |
| 12.1.1.4.3 | Weaknesses/Competitive threats                | 216 |
| 12.1.2     | DASSAULT SYSTEMES                             | 217 |
| 12.1.2.1   | Business overview                             | 217 |
| 12.1.2.2   | Products/Solutions/Services offered           | 219 |
| 12.1.2.3   | Recent developments                           | 220 |
| 12.1.2.3.1 | Deals   | 220 |
| 12.1.2.4   | MnM view                                      | 220 |
| 12.1.2.4.1 | Key strengths/Right to win                    | 220 |
| 12.1.2.4.2 | Strategic choices                             | 220 |
| 12.1.2.4.3 | Weaknesses/Competitive threats                | 220 |
| 12.1.3     | SAP SE  | 221 |
| 12.1.3.1   | Business overview                             | 221 |
| 12.1.3.2   | Products/Solutions/Services offered           | 223 |
| 12.1.3.3   | Recent developments                           | 224 |
| 12.1.3.3.1 | Deals   | 224 |
| 12.1.3.4   | MnM view                                      | 224 |
| 12.1.3.4.1 | Key strengths/Right to win                    | 224 |
| 12.1.3.4.2 | Strategic choices                             | 224 |
| 12.1.3.4.3 | Weaknesses/Competitive threats                | 224 |
| 12.1.4     | ROCKWELL AUTOMATION                           | 225 |
| 12.1.4.1   | Business overview                             | 225 |
| 12.1.4.2   | Products/Solutions/Services offered           | 226 |
| 12.1.4.3   | Recent developments                           | 228 |
| 12.1.4.3.1 | Product launches                              | 228 |
| 12.1.4.3.2 | Deals   | 228 |
| 12.1.4.4   | MnM view                                      | 229 |
| 12.1.4.4.1 | Key strengths/Right to win                    | 229 |
| 12.1.4.4.2 | Strategic choices                             | 229 |
| 12.1.4.4.3 | Weaknesses/Competitive threats                | 229 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

|             |                                     |     |
|-------------|-------------------------------------|-----|
| 12.1.5      | HONEYWELL INTERNATIONAL INC.        | 230 |
| 12.1.5.1    | Business overview                   | 230 |
| 12.1.5.2    | Products/Solutions/Services offered | 231 |
| 12.1.5.3    | Recent developments                 | 232 |
| 12.1.5.3.1  | Deals                               | 232 |
| 12.1.5.4    | MnM view                            | 232 |
| 12.1.5.4.1  | Key strengths/Right to win          | 232 |
| 12.1.5.4.2  | Strategic choices                   | 232 |
| 12.1.5.4.3  | Weaknesses/Competitive threats      | 232 |
| 12.1.6      | ABB                                 | 233 |
| 12.1.6.1    | Business overview                   | 233 |
| 12.1.6.2    | Products/Solutions/Services offered | 234 |
| 12.1.7      | APPLIED MATERIALS                   | 235 |
| 12.1.7.1    | Business overview                   | 235 |
| 12.1.7.2    | Products/Solutions/Services offered | 236 |
| 12.1.8      | EMERSON ELECTRIC CO.                | 237 |
| 12.1.8.1    | Business overview                   | 237 |
| 12.1.8.2    | Products/Solutions/Services offered | 238 |
| 12.1.8.3    | Recent developments                 | 239 |
| 12.1.8.3.1  | Product launches                    | 239 |
| 12.1.8.3.2  | Deals                               | 239 |
| 12.1.9      | GE VERNOVA                          | 240 |
| 12.1.9.1    | Business overview                   | 240 |
| 12.1.9.2    | Products/Solutions/Services offered | 242 |
| 12.1.10     | ORACLE                              | 243 |
| 12.1.10.1   | Business overview                   | 243 |
| 12.1.10.2   | Products/Solutions/Services offered | 244 |
| 12.1.11     | SCHNEIDER ELECTRIC                  | 245 |
| 12.1.11.1   | Business overview                   | 245 |
| 12.1.11.2   | Products/Solutions/Services offered | 246 |
| 12.1.12     | KORBER AG                           | 247 |
| 12.1.12.1   | Business overview                   | 247 |
| 12.1.12.2   | Products/Solutions/Services offered | 248 |
| 12.1.13     | YOKOGAWA ELECTRIC CORPORATION       | 249 |
| 12.1.13.1   | Business overview                   | 249 |
| 12.1.13.2   | Products/Solutions/Services offered | 250 |
| 12.1.13.3   | Recent developments                 | 251 |
| 12.1.13.3.1 | Product launches                    | 251 |
| 12.1.14     | APTEAN                              | 252 |
| 12.1.14.1   | Business overview                   | 252 |
| 12.1.14.2   | Products/Solutions/Services offered | 252 |
| 12.1.15     | EPICOR SOFTWARE CORPORATION         | 253 |
| 12.1.15.1   | Business overview                   | 253 |
| 12.1.15.2   | Products/Solutions/Services offered | 254 |
| 12.1.16     | INFOR                               | 255 |
| 12.1.16.1   | Business overview                   | 255 |
| 12.1.16.2   | Products/Solutions/Services offered | 255 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

|         |  |     |
|---------|--|-----|
| 12.2    | OTHER PLAYERS  | 256 |
| 12.2.1  | 42Q  | 256 |
| 12.2.2  | AEGIS INDUSTRIAL SOFTWARE CORPORATION                  | 257 |
| 12.2.3  | CEREXIO  | 258 |
| 12.2.4  | CRITICAL MANUFACTURING SA                              | 259 |
| 12.2.5  | EYELIT   | 260 |
| 12.2.6  | IBASE-T  | 261 |
| 12.2.7  | MPDV   | 262 |
| 12.2.8  | PARSEC AUTOMATION, LLC                                 | 262 |
| 12.2.9  | TEBIS TECHNISCHE INFORMATIONSSYSTEME AG                | 263 |
| 12.2.10 | THROUGHPUT CONSULTING INC.                             | 263 |
| 12.2.11 | FORCAM ENISCO GMBH                                     | 264 |
| 12.2.12 | MIRACOM, INC.  | 264 |
| 12.2.13 | ANDEA  | 265 |
| 12.2.14 | MASTERCONTROL SOLUTIONS, INC.                          | 265 |
| 13      | APPENDIX   | 266 |
| 13.1    | INSIGHTS FROM INDUSTRY EXPERTS                         | 266 |
| 13.2    | DISCUSSION GUIDE                                       | 267 |
| 13.3    | KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL | 270 |
| 13.4    | CUSTOMIZATION OPTIONS                                  | 272 |
| 13.5    | RELATED REPORTS  | 272 |
| 13.6    | AUTHOR DETAILS   | 273 |

**Manufacturing Execution System Market by Deployment Mode (On-premises, Cloud, Hybrid), Application (Production Management, Quality Management, Material and Inventory Management, Maintenance Management, Performance Analysis) - Global Forecast to 2030**

Market Report | 2025-03-26 | 274 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

| Select license | License                 | Price      |
|----------------|-------------------------|------------|
|                | Single User             | \$4950.00  |
|                | Multi User              | \$6650.00  |
|                | Corporate License       | \$8150.00  |
|                | Enterprise Site License | \$10000.00 |
|                |                         | VAT        |
|                |                         | Total      |

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

|               |                      |                               |                      |
|---------------|----------------------|-------------------------------|----------------------|
| Email*        | <input type="text"/> | Phone*                        | <input type="text"/> |
| First Name*   | <input type="text"/> | Last Name*                    | <input type="text"/> |
| Job title*    | <input type="text"/> |                               |                      |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address*      | <input type="text"/> | City*                         | <input type="text"/> |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|           |                      |           |                      |
|-----------|----------------------|-----------|----------------------|
| Zip Code* | <input type="text"/> | Country*  | <input type="text"/> |
|           |                      | Date      | 2025-05-09           |
|           |                      | Signature | <div></div>          |