

**India Supply Chain Management Market Assessment, By Solution Type [Transportation Management System, Warehouse Management System, Manufacturing Execution System, Procurement and Sourcing, Supply Chain Planning], By Deployment Mode [On-Premises, Cloud-Based], By Industry Vertical [Retail and Consumer Goods, Healthcare and Pharmaceuticals, Manufacturing, Food and Beverages, Transportation and Logistics, Automotive, Others], By Enterprise Size [Large Enterprise, SMEs], By Region, Opportunities and Forecast, FY2018-FY2032F**

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**Report description:**

India supply chain management market is projected to witness a CAGR of 11.12% during the forecast period FY2025-FY2032, growing from USD 2.39 billion in FY2024 to USD 5.55 billion in FY2032. India supply chain management market is experiencing growth due to economic expansion, digital transformation and evolving consumer demands. With India emerging as a global manufacturing and services hub, SCM solutions have become essential in optimizing operations in various industries such as retail, e-commerce, pharmaceuticals, automotive and FMCG.

The rapid rise of e-commerce has changed the logistics domain in the sense that it requires efficient supply chain systems to handle inventory, delivery, and last-mile connectivity. Government and higher authority initiatives have been developing Multi-Model Logistics Parks and introducing a Goods and Services Tax, both of which help streamline logistics activities and reduce

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costs and transit times.

Moreover, technological advances such as AI, blockchain, and IoT, among others, have further helped SCM through improved visibility, predictive analytics, and operational efficiency. Mass investment in infrastructure through the Indian Government on roads, railways, and ports has further strengthened the supply chain ecosystem.

Furthermore, the push for digitalization and automation has been instrumental in improving efficiency with enterprises adopting cloud-based SCM solutions to manage real-time data and optimize resource allocations. Additionally, India's strategic location and the "Make in India" initiative have attracted multinational corporations which boosts the demand for SCM services.

For instance, in October 2024, IndoSpace announced that it would increase its investments up to USD 524 million over the next three years. This move underscores the increasing demand for advanced warehousing and logistics solutions in Tamil Nadu, India which will boost the market for supply chain logistics, driven by the country's expanding manufacturing sector and the government's "Make in India" initiative.

#### The Surge in Economic Expansion Pushes Market Towards Growth

The surge in economic expansion is expanding the supply chain management market in India. The expansion of the economy has fostered industrial growth, trade activities, and consumption. India's GDP growth, driven by the growing middle class, increasing disposable incomes, and urbanization, has seen significant growth in the manufacturing and retail sectors, thus creating a demand for efficient logistics and supply chain solutions.

The government's emphasis on industrialization through initiatives such as "Make in India" attracted foreign direct investment, which pushed the establishment of manufacturing hubs and increased supply chain networks. Additionally, infrastructure developments such as highways, rail corridors and port facilities have facilitated the movement of goods which has enhanced the demand for advanced SCM practices.

Moreover, India's booming e-commerce is estimated to grow to USD 150 billion by 2025, increasing the need for regulations over the supply chain. Consequently, companies are investing more in predictive analytics, IoT, and automation for inventory management for cost-cutting and faster delivery times.

Furthermore, the rise in global exports and India's emergence as a manufacturing alternative to China have further boosted the need for robust SCM systems. This economic dynamism coupled with a focus on digital transformation is making India a key player in the global supply chain ecosystem. It diversifies the market's revenue streams and assures consistent demand, considerably contributing to its growth.

For instance, in November 2024, there was a surge in hiring within the booming, fast-moving consumer goods (FMCG) industry. Bengaluru leads in recruiting fresh talent, accounting for 41% of new hires in this sector. The uptick is attributed to deeper market penetration in rural and semi-urban areas, which necessitates efficient supply operations to meet increased consumer demand.

#### Revolution in Digitalization and Technology Drive India Supply Chain Management Market Growth

The incorporation of technology and digitalization is revolutionizing India's supply management market by enabling efficiency, cost reduction, and smooth operations. As industries adopt digital transformation, advanced technologies such as artificial intelligence (AI), the Internet of Things (IoT), blockchain, and cloud computing have become integral to supply chain processes. AI-powered analytics, along with machine learning, allow predictive forecasting of demand to help companies minimize inventory quantities and reduce waste. IoT devices enhance real-time tracking, providing visibility across the supply chain and ensuring timely delivery of goods. Additionally, blockchain technology ensures transparency and security, minimizing transaction fraud and errors.

Moreover, the Indian government's push for digitalization through incentives such as "Digital India" has further enhanced technological adoption in supply chain management. Startups and established firms leverage digital tools to integrate supply chain operations, reduce costs, and improve customer satisfaction. This diversification modifies the market, assuring long-term growth and reinforcing the critical role of the technology ecosystem in India supply chain management.

For instance, in September 2024, the U.S. Department of State and the India Semiconductor Mission collaborated to explore opportunities in the semiconductor supply chain to emphasize the importance of digital technologies in enhancing supply chain efficiency and resilience.

#### Transportation Management System Leads Market Share

Transportation Management System has cemented its dominance with strong statistics in the Indian market owing to the

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country's rapidly growing logistics sector and the increasing complexity of transportation networks. Transportation management systems have streamlined the movement of goods by optimizing routes which helps in reducing operational costs, which makes them crucial for businesses that are seeking efficiency in supply chain operations.

With the Indian online e-commerce market growing, the nation has required further advanced transportation solutions. The recent growth of online retail companies that face the challenge of managing last-mile deliveries, which is rather the most expensive and time-consuming part of the supply chain, has helped mitigate that with the help of TMS in terms of automating route planning to ensure timely delivery at reasonable costs.

Moreover, the Indian government's push for infrastructure development, such as the creation of Multi-Modal Logistics Parks (MMLPs) and the improvement of roads and rail networks, has created a more interconnected transportation system, which enhances the effectiveness of TMS solutions. These technological advancements in infrastructure combined with cloud-based TMS platforms allow for real-time tracking, improved visibility, and better coordination among stakeholders.

Furthermore, the rise in e-commerce, infrastructure development, and technological innovations are driving demand for the widespread adoption of TMS solutions in India's supply chain management market.

For instance, in September 2024, India's cabinet approved a scheme of USD 1.3 billion on incentives for the adoption of electric vehicles in its efforts to curb pollution and move towards cleaner fuels. The adoption of EVs necessitates advanced TMS solutions to efficiently manage the unique requirements of electric fleets such as route optimization, charging station integration and real-time tracking.

**Western Region Dominates Supply Chain Management Market Share**

Western region is exerting its dominance in the supply chain management market in India, particularly Maharashtra, Gujarat and Rajasthan due to its strategic industrial, logistical and infrastructural advantages.

Maharashtra and Gujarat are the major industrial centers with cities such as Mumbai, Pune, and Ahmedabad, as the manufacturing, retail, automotive, and pharmaceutical hubs. These industries require efficient and advanced supply chain solutions to manage production and distribution networks.

Furthermore, the growth of e-commerce in the region has driven demand for efficient warehousing, logistics, and transportation services. Mumbai and Pune cities are at the center of the e-commerce business, and SCM solutions are needed to ensure timely delivery and proper inventory management.

**Future Market Scenario (FY2025 – FY2032F)**

Companies are increasingly adopting technological solutions to enhance visibility, agility, and cost optimization within their supply chains. Key technologies include artificial intelligence (AI), automation, and digital supply chain analytics.

The growth of e-commerce has significantly impacted logistics and supply chain operations, increasing demand for efficient SCM solutions that can handle complex distribution networks.

Supportive government policies aimed at improving infrastructure and logistics capabilities further bolster the SCM sector's growth potential.

**Key Players Landscape and Outlook**

Continuous innovation characterizes the landscape of supply chain management in India, as the companies compete to outperform one another in terms of real-time analytics, automation and AI. The market prognosis remains positive, owing to a surge in economic expansion, and revolution in digitalization and technology. India supply chain management manufacturers are focused on digitalization and technology adoption, e-commerce and last-mile delivery solutions, and supply chain resilience and diversification, which will likely define the industry's future. Collaborations and developing technologies are projected to increase competition in this fast-paced market.

For instance, in January 2024, HCLTech announced a strategic collaboration with SAP to enhance innovation and accelerate the adoption of Generative AI, which is set to significantly impact supply chain management. By developing a repository of Gen AI use cases tailored for SAP software, this partnership aims to empower businesses to optimize their supply chain processes.

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\*All segments will be provided for all regions covered

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