

PLM Software - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

PLM Software Market Analysis

The PLM software market size stood at USD 46.27 billion in 2025 and is forecast to reach USD 70.39 billion by 2030, advancing at 8.8% CAGR. Sustained migration from on-premise installations to cloud-native rollouts, the rapid infusion of generative-AI copilots into engineering environments, and rising regulatory demands for traceability collectively lift growth prospects. Vendors highlight that software-as-a-service (SaaS) PLM subscriptions expand collaboration across globally dispersed engineering teams while lowering operating expenses through automatic updates and elastic compute resources. Generative-AI assistants accelerate engineering change-order (ECO) cycles, freeing specialist capacity amid persistent skills shortages in automotive, aerospace, and electronics design. Meanwhile, end-to-end digital-thread projects that link design, simulation, manufacturing, service, and recycling data deliver a single source of truth that simplifies compliance with Europe's Digital Product Passport and similar mandates worldwide. Competitive dynamics intensify as leading providers acquire adjacent simulation and data-science assets, signalling a race to deliver comprehensive industrial platforms built on secure, multi-tenant architectures.

Global PLM Software Market Trends and Insights

Cloud-first adoption among Tier-1 manufacturers

The PLM software market is pivoting from legacy on-premise environments to SaaS delivery as industrial leaders seek real-time collaboration across global design centres. Gartner notes that half of midsize and large manufacturers will standardise on SaaS

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PLM by 2026, while Aras reports more than 50% year-over-year growth in cloud subscriptions. Success stories such as Red Bull and H-TEC Systems reveal 35-50% cost savings after replacing locally hosted tools with Aras Innovator SaaS. Automatic patching, built-in cyber-security, and instant access to AI-assisted analytics amplify the appeal, although data-sovereignty concerns temper adoption in markets such as Japan, where acceptance lingers at 60%. Even so, hybrid rollouts that retain sensitive workloads on site while using SaaS for collaboration act as a pragmatic bridge during migration.

Growing need for end-to-end digital thread

Enterprises now treat product data as a continuum spanning concept, design, simulation, manufacturing, service, and recycling. Lockheed Martin's integration of Teamcenter with a next-generation MES demonstrates how aircraft builders gain full lifecycle visibility and cut unplanned rework. Airbus's "Greenhouse" initiative ties more than 1,000 legacy systems into Aras Innovator, enabling rapid application prototyping while enforcing common data models. As sustainability audits rise, digital threads deliver granular carbon-footprint metrics, facilitating compliance with EU Eco-design rules and building resilient supply chains able to respond rapidly to disruption or recall events.

Persistent interoperability gaps between legacy CAD and modern PLM

Migrating 4,400 files from SOLIDWORKS to Teamcenter can still consume more than a month for skilled consultants, underscoring the disconnect between desktop CAD schemas and enterprise PLM databases. PTC's Onshape migration-wizard powered by AWS attempts to automate data mapping, yet many firms run hybrid environments that inflate support costs and dilute the promised single source of truth.

Other drivers and restraints analyzed in the detailed report include:

Regulatory push for product traceability and sustainability reporting / Generative-AI copilots trimming engineering change-order cycles / Cyber-security and IP leakage concerns in multi-tenant SaaS /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

On-premise systems still house 68.2% of the PLM software market in 2024, reflecting sunk investments in data-centre hardware and bespoke integrations. Cloud subscriptions rise at 10.5% CAGR as pandemic-era remote-work imperatives uncover the collaboration limits of site-bound servers. Aras records >50% annual SaaS growth and cites surveys where 81% of industrial respondents expect SaaS to become the default delivery model. Modern rollouts favour hybrid design patterns that retain regulated data locally while exploiting cloud elasticity for analytics. This shift ensures the PLM software market size for cloud deployments is projected to eclipse USD 30 billion by 2030 at current growth rates. The DACH region features 91% SaaS acceptance, contrasting with 60% in Japan, where cultural emphasis on data sovereignty slows transition.

Second-generation SaaS architectures offer zero-downtime upgrades and built-in disaster recovery. Vendors layer AI services atop common data models, letting users tap natural-language search and automated code generation without installing patches. Security now equals or surpasses on-premise benchmarks thanks to hardware-root-of-trust modules and continual penetration testing. As a result, the PLM software market steadily reallocates budgets from capital expenditure on servers to operational expenditure on subscription bundles.

Collaborative PDM/cPDM tools capture 56.1% revenue share by managing drawings, specifications, and change records across multi-disciplinary teams. Yet the fastest-growing slot belongs to digital-manufacturing and MES-PLM integration, which expands

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9.9% CAGR as plant managers seek real-time feedback loops between design intent and shop-floor execution. Lockheed Martin exemplifies gains after linking a next-generation MES to Teamcenter, shrinking rework via instant propagation of design updates. The PLM software market size for MES-linked offerings is on track to double by 2030, evidence that discrete boundaries between engineering and operations are disappearing.

Simulation, analysis, and ALM/SLM categories log steady demand, especially in software-defined products like EVs and connected medical devices. Siemens' USD 10.6 billion Altair buyout unites multiphysics solvers with Teamcenter, creating an integrated environment where engineers iterate designs, run virtual tests, and push validated parameters directly to production. As Industry 4.0 accelerates, the PLM software market will likely elevate closed-loop workflows that merge design, production, and field-performance data into a continuous improvement cycle.

The PLM Software Market Report is Segmented by Deployment Type (On-Premise and Cloud), Solution Type (Collaborative PDM / CPDM, MCAD Integration PLM, and More), Organization Size (Large Enterprises and Small and Medium Enterprises (SMEs)), End-User Industry (Automotive and Transportation, Aerospace and Defence, and More), and Geography.

Geography Analysis

North America captured 36.4% revenue in 2024, benefiting from deep aerospace and high-tech clusters that standardised early on digital-thread programmes. Generative-AI pilots proliferate in Silicon Valley, where start-ups co-innovate with PLM incumbents on context-aware assistants. Federal initiatives that stipulate model-based systems engineering in defence contracts further cement demand.

Asia-Pacific is the fastest-growing theatre with 9.6% CAGR as China's industrial software sector more than doubled from 1,293 billion yuan in 2017 to beyond 3,000 billion yuan by 2024. Government drives such as "Made in China 2025" and India's Production-Linked Incentive schemes spur factories to digitise. Hisense Group reports a 70% design-efficiency gain after rolling out a multi-site PLM backbone, trimming average cycle time from 60 days to 43.2 days. Consequently, Asia-Pacific's slice of the PLM software market size is projected to surpass USD 20 billion by 2030 if present momentum persists.

Europe remains pivotal through regulatory leadership. The Eco-design Regulation forces manufacturers to embed sustainability attributes at design inception, reinforcing the need for lifecycle data management. Siemens' partnership with BAE Systems under a five-year digital-innovation accord indicates ongoing modernisation within the UK defence complex. Meanwhile, sovereign-cloud imperatives in France and Germany steer procurement towards regional data centres certified under Gaia-X frameworks. Emerging economies in Latin America, the Middle East, and Africa are gradually entering the PLM software market, aided by public-cloud infrastructure that removes capex hurdles and local partners that deliver vertical templates.

List of Companies Covered in this Report:

Siemens AG / Dassault Systemes SE / PTC Inc. / SAP SE / Autodesk Inc. / Oracle Corporation / IBM Corporation / ANSYS Inc. / Aras Corporation / Arena (SaaS by PTC) / Infor Inc. / Hexagon AB / Bentley Systems Inc. / Altair Engineering Inc. / Propel Software / Siemens Mendix / Dassault SolidWorks / IFS AB / HCL Tech xLMCloud / Accenture Industry X / ABB Ability PLM / Epicor CPQ / OpenBOM / Propulsion-PLM /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
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Table of Contents:

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1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Cloud-first adoption among Tier-1 manufacturers

4.2.2 Growing need for end-to-end digital thread

4.2.3 Regulatory push for product traceability and sustainability reporting

4.2.4 Generative-AI copilots trimming engineering change-order cycles

4.2.5 Micro-subscription PLM bundles for SMB value chains

4.3 Market Restraints

4.3.1 Persistent interoperability gaps between legacy CAD and modern PLM

4.3.2 Cyber-security and IP leakage concerns in multi-tenant SaaS

4.3.3 Growing open-source digital twin stacks cannibalising paid licences

4.4 Value Chain Analysis

4.5 Technological Outlook

4.6 Porter's Five Forces Analysis

4.6.1 Bargaining Power of Suppliers

4.6.2 Bargaining Power of Buyers

4.6.3 Threat of New Entrants

4.6.4 Threat of Substitutes

4.6.5 Intensity of Competitive Rivalry

4.7 Assessment of the Impact of Macroeconomic Trends on the Market

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Deployment Type

5.1.1 On-Premise

5.1.2 Cloud

5.2 By Solution Type

5.2.1 Collaborative PDM / cPDM

5.2.2 MCAD Integration PLM

5.2.3 Simulation and Analysis

5.2.4 Digital Manufacturing and MES-PLM

5.2.5 ALM / SLM

5.3 By Organisation Size

5.3.1 Large Enterprises

5.3.2 Small and Medium Enterprises (SMEs)

5.4 By End-user Industry

5.4.1 Automotive and Transportation

5.4.2 Aerospace and Defence

5.4.3 Electronics and High-Tech

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- 5.4.4 Industrial Machinery and Heavy Equipment
- 5.4.5 Architecture, Engineering and Construction (AEC)
- 5.4.6 Life Sciences and Medical Devices
- 5.4.7 Consumer Packaged Goods / Retail
- 5.4.8 Others
- 5.5 By Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.1.3 Mexico
 - 5.5.2 Europe
 - 5.5.2.1 Germany
 - 5.5.2.2 United Kingdom
 - 5.5.2.3 France
 - 5.5.2.4 Italy
 - 5.5.2.5 Spain
 - 5.5.2.6 Russia
 - 5.5.2.7 Rest of Europe
 - 5.5.3 Asia-Pacific
 - 5.5.3.1 China
 - 5.5.3.2 Japan
 - 5.5.3.3 India
 - 5.5.3.4 South Korea
 - 5.5.3.5 ASEAN
 - 5.5.3.6 Australia and New Zealand
 - 5.5.3.7 Rest of Asia-Pacific
 - 5.5.4 South America
 - 5.5.4.1 Brazil
 - 5.5.4.2 Argentina
 - 5.5.4.3 Rest of South America
 - 5.5.5 Middle East and Africa
 - 5.5.5.1 Middle East
 - 5.5.5.1.1 Saudi Arabia
 - 5.5.5.1.2 UAE
 - 5.5.5.1.3 Turkey
 - 5.5.5.1.4 Rest of Middle East
 - 5.5.5.2 Africa
 - 5.5.5.2.1 South Africa
 - 5.5.5.2.2 Nigeria
 - 5.5.5.2.3 Rest of Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

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- 6.4.1 Siemens AG
- 6.4.2 Dassault Systemes SE
- 6.4.3 PTC Inc.
- 6.4.4 SAP SE
- 6.4.5 Autodesk Inc.
- 6.4.6 Oracle Corporation
- 6.4.7 IBM Corporation
- 6.4.8 ANSYS Inc.
- 6.4.9 Aras Corporation
- 6.4.10 Arena (SaaS by PTC)
- 6.4.11 Infor Inc.
- 6.4.12 Hexagon AB
- 6.4.13 Bentley Systems Inc.
- 6.4.14 Altair Engineering Inc.
- 6.4.15 Propel Software
- 6.4.16 Siemens Mendix
- 6.4.17 Dassault SolidWorks
- 6.4.18 IFS AB
- 6.4.19 HCL Tech xLMCloud
- 6.4.20 Accenture Industry X
- 6.4.21 ABB Ability PLM
- 6.4.22 Epicor CPQ
- 6.4.23 OpenBOM
- 6.4.24 Propulsion-PLM

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-need Assessment

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