

Global Manufacturing Execution System in Life Sciences Market Size Study & Forecast, By Solution Type (Software, Services) By Deployment (On-Premise, Cloud/Web-Based, Hybrid), By End-user (Pharmaceutical and Biotechnology Companies, Medical Device Companies, Others (CDMOs, CROs, etc.)) and Regional Analysis, 2023-2030

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Abstracts

Global Manufacturing Execution System in Life Sciences Market is valued at approximately USD 2.47 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 12.20% over the forecast period 2023-2030. A Manufacturing Execution System (MES) in life sciences refers to a software-based solution designed to manage and control the manufacturing processes within the pharmaceutical, biotechnology, and medical device industries. MES facilitates the real-time monitoring, tracking, and execution of manufacturing operations, from raw material preparation to finished product packaging. The increasing prominence of the biopharmaceutical sector, rising technological advancements, and the rise in adoption of Pharma 4.0 stand out as key drivers fueling the demand for Manufacturing Execution Systems (MES) within the life sciences sector. The pharmaceutical industry embracing digital transformation, the push for Pharma 4.0, and the adoption of MES in the life sciences market are on the rise. Pharma 4.0 initiatives aim to bolster connectivity, productivity, compliance, and information management, enabling more effective solutions to industry challenges.

The increasing digitization within the pharmaceutical industry is driving the demand for Pharma 4.0, a significant factor contributing to the expansion of the manufacturing execution system market in the life sciences sector. Pharma 4.0 facilitates heightened connectivity and productivity while streamlining compliance efforts and enabling swift

response to emerging issues through enhanced production information management. This model revolutionizes manufacturing processes by fostering more human-centric workflows and connecting workers more effectively. The International Society for Pharmaceutical Engineering (ISPE) and its members are actively developing a roadmap to introduce Pharma 4.0, aiming to empower organizations to harness the full potential of digitalization for faster therapeutic innovations and improved production processes, ultimately benefiting patients. Key stakeholders within the Pharma 4.0 ecosystem are collaborating to accelerate its adoption. For example, in March 2021, Lonza and NNIT announced a strategic partnership aimed at expediting MES projects. This collaboration integrates Lonza's MODA Platform with NNIT's Accelerated Implementation Methodology, providing organizations with a comprehensive Pharma 4.0 solution and facilitating the realization of their digitalization goals at an accelerated pace. Consequently, the increasing adoption of Pharma 4.0 drives the growth of the Manufacturing Execution System Market in The Life Sciences Industry. In addition, the globalization of the life sciences industry and stringent regulatory requirements for biological development are creating new opportunities for market growth. However, the high implementation cost and data security and privacy concerns stifle market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Manufacturing Execution System in Life Sciences Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to technological advancements and the increasing digitization of manufacturing processes within the pharmaceutical industry are key factors propelling market growth in North America. Furthermore, the market benefits from the presence of influential industry players like Emerson Electric Co. and Rockwell Automation, which contribute significantly to streamlining healthcare manufacturing processes. Additionally, the adoption of integrated laboratory automation solutions presents promising growth avenues for MES providers. For instance, Automata's plans to expand its services in the U.S. in February 2023 exemplify the market's expanding opportunities. Asia Pacific is expected to grow significantly during the forecast period, owing to factors such as the rising biotechnology industry, rising number of clinical trials, and rising government support for the life science industry in the region.

Major market players included in this report are:

K?rber AG

ABB Laboratories

MasterControl Solutions, Inc.

AVEVA Group Limited

Cognizant Technology Solutions Corporation

Rockwell Automation

Nagarro, Inc.

Siemens AG

Emerson Electric Co.

iBase-t, Inc.

Recent Developments in the Market:

In January 2024, CGI Inc. and K?rber AG joined hands to provide an integrated solution tailored to optimize production processes for pharmaceutical and life sciences firms. By merging CGI's end-to-end Solution Types with K?rber's Werum PAS-X MES Suite, the partnership endeavours to enhance accuracy, efficiency, and safety throughout the pharmaceutical product development cycle. Additionally, clients gain access to real-time data, empowering them to make informed decisions and elevate overall operational performance.

In February 2023, AVEVA Group Limited, a leading industrial software provider, unveiled its latest offering: the AVEVA Manufacturing Execution System. This updated release is designed to streamline the deployment of multi-site MES solutions while mitigating associated costs and complexities. With its enhanced version, AVEVA MES facilitates quicker and more efficient adoption of industry best practices, ultimately driving operational efficiency and sustainability improvements.

Global Manufacturing Execution System in Life Sciences Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered – Solution Type, Deployment, End-user, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters to detailed information about the crucial aspects such as driving factors & challenges that will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Solution Type:

Software

Services

By Deployment:

On-Premise

Cloud/Web-Based

Hybrid

By End-user:

Pharmaceutical and Biotechnology Companies

Medical Device Companies

Others (CDMOs, CROs, etc.)

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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