

Global Supply Chain Management Software Market: Analysis By Deployment (On Premise & Cloud), By Enterprise Size (Large Enterprises and Small and Medium Enterprises (SMEs)), By Solution (Manufacturing Execution System, Transportation Management System, Procurement And Sourcing, Warehouse Management System Management, & Supply Chain Planning), By Industry Vertical (Manufacturing, Food & Beverages, Transportation & Logistics, Retail & E-commerce, Healthcare, Automotive, & Others), By Region, Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global supply chain management software market in 2022 was valued at US\$21.65 billion. The market value is anticipated to grow to US\$39.69 billion by 2028. Supply chain management (SCM) has become an essential component of business operations. It has enabled industries all over the world to streamline their operations while achieving the finest revenue returns. Supply chain management software is a real-time analytical platform that speeds up the movement of information and materials throughout the supply chain network. The program is intended to improve a company's SCM processes and offer businesses with visibility into procurement, manufacturing, inventory, distribution, and retailing. Furthermore, supply chain management software can be customized and modified to meet the needs of the organization. Large retailers with many regional distribution centers, like Walmart, use supply chain management

systems to coordinate between suppliers of merchandise (e.g., clothes, paper products) and Walmart's retail stores to reduce inventory costs. This helps retailers like Walmart pass savings onto customers through lower prices for many everyday products. The backbone of many service operations is Supply Chain Management or SCM.

The market value is expected to grow at a CAGR of 10.63% during the forecast period of 2023-2028. The growing demand for real-time analysis and identification of complex patterns, development of industrial-grade digital technology, surge in need for improved supply chain transparency, as increase in inclination toward cloud-based supply chain management software well as the growing use of big data virtualization, are creating new growth opportunities for supply chain management software vendors. Improved performance, scalability, reliability, better problem solving, and real-time application are some of the key benefits of implementing supply chain management software solutions.

Market Segmentation Analysis:

By Deployment: The report provides the segmentation of supply chain management software based on the deployment: On Premise and Cloud. During the forecast period, the cloud-based segment is expected to grow at the fastest CAGR. Cloud computing and storage systems are becoming increasingly popular among small and medium-sized businesses. Several organizations are gradually transitioning to cloud infrastructure, and this trend is expected to accelerate in the coming years. The advantages of cloud infrastructure, such as ease of adoption, reduced reliance on in-house infrastructure, scalability, and simple installation, contribute to the segment's rapid growth.

By Enterprise Size: The supply chain management software market is further bifurcated based on the enterprise size: Large Enterprises and Small and Medium Enterprises (SMEs). Large enterprises dominated the market in 2022. Large enterprises typically have more complex supply chains, with multiple suppliers and distribution networks spanning multiple countries and regions. As a result, they require SCM software solutions that offer robust features and functionalities for managing these complexities. The market's rise is being driven by the demand for software in key industry verticals to assist in the collection of critical business data from various and different sources, such as inventory levels, predicted sales figures, supplier information, and others.

By Solution: The report provides the bifurcation of the market into five segments based on the solution: Manufacturing Execution System, Transportation Management

System, Procurement and Sourcing, Warehouse Management System Management, and Supply Chain Planning. In 2022, the manufacturing execution system segment accounted for the largest share of the supply chain management software market. The growth of MES in the supply chain is driven by the need for real-time visibility and control over production processes. This allows manufacturers to improve production efficiency and reduce costs. The increasing adoption of automation and the rise of Industry 4.0 are also driving the growth of MES in the supply chain.

By Industry Vertical: The report provides the bifurcation of the market into seven segments based on the industry vertical: Manufacturing, Food & Beverages, Transportation & Logistics, Retail & E-commerce, Healthcare, Automotive, and Others. The retail & e-commerce segment is expected to grow with the highest CAGR during the forecasted period. The goal of retail and e-commerce supply chain management software is to assist these businesses in managing their whole supply chain, from the acquisition of raw materials to the distribution of finished goods to customers. Retailers can use the program to track consumer orders, manage their inventory, and guarantee delivery on time. The demand for better inventory management, the requirement for real-time insight into the supply chain, and the want for greater supplier and customer collaboration are the drivers influencing the adoption of supply chain management software in the retail and e-commerce sector.

By Region: The report provides insight into the supply chain management software market based on the geographical operations, namely North America, Europe, Asia Pacific, and ROW. The North American region held a dominant share in the supply chain management software market, owing to the factors such as increasing adoption of cloud-based technologies, which are enabling businesses to store and analyze large amounts of data more efficiently and cost-effectively. Additionally, there is a growth in the adoption of supply chain management software in the healthcare & pharmaceutical industries. With the compulsory implementation of GS1 standards & Unique Device Identification on pharmaceutical drugs and medical devices, the adoption of SCM software is increasing in the region.

During the forecast period, Asia-Pacific is anticipated to expand rapidly. This expansion is due to rapid industrialization and increased government spending. Companies in Asia-Pacific are increasingly adopting internet-based technologies, resulting in a rise in the region's use of cloud-based SCM software. The region's countries' ever-increasing economic development, as well as the rising services sector, are encouraging business firms to make large investments in supply chain management software in order to sustain growth and improve productivity. Besides, there is an increased awareness

among enterprises regarding the benefits of supply chain management solutions.

Market Dynamics:

Growth Drivers: One of the most important factors impacting the global supply chain management software market is the growing E-commerce industry. The growth of the e-commerce industry has had a significant impact on the supply chain management software market. As more and more consumers turn to online shopping, businesses must adapt to keep up with the increasing demand. This has led to an increase in the need for efficient and streamlined supply chain management processes, which can be facilitated by software solutions. E-commerce service providers have set up warehouses to manage inventory and shipping. The introduction of supply chain management (SCM) software, such as WMS software, helps end users save time and improve the process of checking inventory and new shipments on a daily and monthly basis. Furthermore, the market has been growing over the past few years, due to factors such as growing demand for real-time visibility, adoption of SCM software in healthcare and pharmaceutical companies, growing need for demand management system, implementation of digitization in businesses, increasing adoption of cloud based supply chain management software and globalization.

Challenges: However, the market has been confronted with some challenges specifically, high initial cost and availability of open-source software, increase in security and privacy concerns, etc. Software licensing, installation, maintenance, hardware, customization, and training charges all contribute to the escalating costs of SCM software systems. The high cost of putting data collection devices in transportation vehicles and IT infrastructure overcomes the high cost of controlling and monitoring continuous transportation and logistics processes. As a result, numerous stakeholders are experiencing difficulties. Implementing SCM software, for example, necessitates the training of IT personnel in administrative and operational abilities. Once installed, the SCM solution must be continually updated in order to stay current with market trends and interact with modern technologies such as big data and blockchain. These elements raise the cost of installing and sustaining SCM solutions.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as integration of artificial intelligence (AI) in supply chain, adoption of big data analytics and IoT, advancements in industrial-grade digital technologies, increasing demand from aviation industry and inclination towards technological advancement and investments. Adoption of big data analytics and IoT is a key trend impacting the growth of the supply chain management software industry. End-

user industries such as healthcare, retail, manufacturing, financial services, banking and insurance, education, transportation, SCM, logistics, and agriculture benefit from IoT and big data by analysing and improving operational efficiency. Big data analytics can help the SCM system manage the massive volume of data created by IoT devices. IoT, in conjunction with big data analytics, can assist businesses in increasing operational efficiency. Several logistics service companies have integrated big data and IoT into their supply chain management (SCM) platforms. Integrating digital twins and supply chain solutions reduces human involvement with systems through machine-to-machine communication, allowing for effective warehouse monitoring and administration. Increasing IoT and big data integration will have a favourable impact on market growth throughout the forecast period.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had a significant impact on the global economy, including the supply chain management software market. With the disruption caused by the pandemic, businesses have had to quickly adapt to the new normal, leading to changes in the demand and supply of goods and services, as well as a shift in consumer behavior. Due to the economic uncertainty caused by the pandemic, some businesses delayed or cancelled their software projects, leading to a temporary slowdown in the supply chain management software market. Indeed, according to the Institute for Supply Chain Management Organization in early 2020, nearly 75% of firms disclosed SCM disruptions. However, the things reversed during the second half of the pandemic as businesses resume their software projects.

The pandemic has highlighted the need for businesses to be more agile and responsive to changing market conditions, and one way to achieve this is through the adoption of automation and artificial intelligence. In the post-COVID world, it is expected that there would be an increased adoption of these technologies to streamline supply chain operations and reduce costs, which may drive supply chain management software market growth. Blockchain technology is increasingly being utilized to improve transparency, traceability, and security in supply chain management.

Competitive Landscape:

The global supply chain management software market is highly fragmented and constantly evolving. There are a variety of vendors in this market, ranging from large enterprise software providers to specialized niche players. Technological advancements in the market are also bringing sustainable competitive advantage to companies, and

the market is witnessing multiple partnerships and mergers.

The key players in the global supply chain management software market are:

Oracle Corporation

SAP SE

International Business Machines Corporation (IBM)

Descartes Systems Group Inc.

E2open Parent Holdings, Inc.

Kinaxis Inc.

American Software, Inc. (Logility)

Infor Global Solutions Inc.

Coupa Software Inc.

Epicor Software Corporation

K?rber AG

Blue Yonder Group, Inc.

O9 Solutions Inc.

SAP is currently the dominant player in the industry, with Oracle following closely behind. However, Oracle has recently made significant progress in the Cloud SCM market by offering a range of enhancements and accelerated go-live templates. These developments have appealed to a large number of net new customers, including many who recognize the strategic value of a unified Oracle cloud platform.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Supply Chain Management Software: An Overview

2.1.1 Definition of Supply Chain Management Software

2.2 Supply Chain Management Software Segmentation: An Overview

2.2.1 Supply Chain Management Software Segmentation

2.2.2 Supply Chain Management Software Segmentation by Industry Vertical

3. GLOBAL MARKET ANALYSIS

3.1 Global Supply Chain Management Software Market: An Analysis

3.1.1 Global Supply Chain Management Software Market: An Overview

3.1.2 Global Supply Chain Management Software Market by Value

3.1.3 Global Supply Chain Management Software Market by Deployment (On Premise & Cloud)

3.1.4 Global Supply Chain Management Software Market by Enterprise Size (Large Enterprises and Small and Medium Enterprises (SMEs))

3.1.5 Global Supply Chain Management Software Market by Solution (Manufacturing Execution System, Transportation Management System, Procurement And Sourcing, Warehouse Management System Management, & Supply Chain Planning)

3.1.6 Global Supply Chain Management Software Market by Industry Vertical (Manufacturing, Food & Beverages, Transportation & Logistics, Retail & E-commerce, Healthcare, Automotive, & Others)

3.1.7 Global Supply Chain Management Software Market by Region (North America, Asia Pacific, Europe, and Rest of the World (ROW))

3.2 Global Supply Chain Management Software Market: Deployment Analysis

3.2.1 Global Supply Chain Management Software Market By Deployment: An Overview

3.2.2 Global On Premise Supply Chain Management Software Market By Value

3.2.3 Global Cloud Supply Chain Management Software Market By Value

3.3 Global Supply Chain Management Software Market: Enterprise Size Analysis

3.3.1 Global Supply Chain Management Software Market By Enterprise Size: An Overview

3.3.2 Global Large Enterprises Supply Chain Management Software Market By Value

3.3.3 Global Small and Medium Enterprises (SMEs) Supply Chain Management

Software Market By Value

3.4 Global Supply Chain Management Software Market: Solution Analysis

3.4.1 Global Supply Chain Management Software Market By Solution: An Overview

3.4.2 Global Manufacturing Execution System Supply Chain Management Software Market By Value

3.4.3 Global Transportation Management System Supply Chain Management Software Market By Value

3.4.4 Global Procurement and Sourcing Supply Chain Management Software Market By Value

3.4.5 Global Warehouse Management System Management Supply Chain Management Software Market By Value

3.4.6 Global Supply Chain Planning Supply Chain Management Software Market By Value

3.5 Global Supply Chain Management Software Market: Industry Vertical Analysis

3.5.1 Global Supply Chain Management Software Market By Industry Vertical: An Overview

3.5.2 Global Manufacturing Supply Chain Management Software Market By Value

3.5.3 Global Food & Beverages Supply Chain Management Software Market By Value

3.5.4 Global Transportation & Logistics Supply Chain Management Software Market By Value

3.5.5 Global Retail & E-commerce Supply Chain Management Software Market By Value

3.5.6 Global Healthcare Supply Chain Management Software Market By Value

3.5.7 Global Automotive Supply Chain Management Software Market By Value

3.5.8 Global Other Industries Supply Chain Management Software Market By Value

4. REGIONAL MARKET ANALYSIS

4.1 North America Supply Chain Management Software Market: An Analysis

4.1.1 North America Supply Chain Management Software Market: An Overview

4.1.2 North America Supply Chain Management Software Market by Value

4.1.3 North America Supply Chain Management Software Market by Region (The US, Canada and Mexico)

4.1.4 The US Supply Chain Management Software Market by Value

4.1.5 The US Supply Chain Management Software Market by Deployment (On Premise & Cloud)

4.1.6 The US On Premise Supply Chain Management Software Market By Value

4.1.7 The US Cloud Supply Chain Management Software Market By Value

4.1.8 Canada Supply Chain Management Software Market by Value

- 4.1.9 Mexico Supply Chain Management Software Market by Value
- 4.2 Europe Supply Chain Management Software Market: An Analysis
 - 4.2.1 Europe Supply Chain Management Software Market: An Overview
 - 4.2.2 Europe Supply Chain Management Software Market by Value
 - 4.2.3 Europe Supply Chain Management Software Market by Region (United Kingdom, Germany, France, Italy, Spain and Rest of the Europe)
 - 4.2.4 United Kingdom Supply Chain Management Software Market by Value
 - 4.2.5 Germany Supply Chain Management Software Market by Value
 - 4.2.6 France Supply Chain Management Software Market by Value
 - 4.2.7 Italy Supply Chain Management Software Market by Value
 - 4.2.8 Spain Supply Chain Management Software Market by Value
 - 4.2.9 Rest of Europe Supply Chain Management Software Market by Value
- 4.3 Asia Pacific Supply Chain Management Software Market: An Analysis
 - 4.3.1 Asia Pacific Supply Chain Management Software Market: An Overview
 - 4.3.2 Asia Pacific Supply Chain Management Software Market by Value
 - 4.3.3 Asia Pacific Supply Chain Management Software Market by Region (China, Japan, South Korea, India, and Rest of Asia Pacific)
 - 4.3.4 China Supply Chain Management Software Market by Value
 - 4.3.5 Japan Supply Chain Management Software Market by Value
 - 4.3.6 South Korea Supply Chain Management Software Market by Value
 - 4.3.7 India Supply Chain Management Software Market by Value
 - 4.3.8 Rest of Asia Pacific Supply Chain Management Software Market by Value
- 4.4 Rest of the World (ROW) Supply Chain Management Software Market: An Analysis
 - 4.4.1 Rest of the World (ROW) Supply Chain Management Software Market: An Overview
 - 4.4.2 Rest of the World (ROW) Supply Chain Management Software Market by Value

5. IMPACT OF COVID-19

- 5.1. Impact of COVID-19 on Supply Chain Management Software Market
- 5.2 Post COVID Scenario

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Growing E-commerce Industry
 - 6.1.2 Growing Demand for Real-time Visibility
 - 6.1.3 Adoption of SCM Software in Healthcare and Pharmaceutical companies
 - 6.1.4 Growing Need for Demand Management System

- 6.1.5 Implementation of Digitization in Businesses
- 6.1.6 Increasing Adoption of Cloud Based Supply Chain Management Software
- 6.1.7 Globalization
- 6.2 Challenges
 - 6.2.1 High Initial Cost and Availability of Open-source Software
 - 6.2.2 Increase in Security and Privacy Concerns
- 6.3 Market Trends
 - 6.3.1 Integration of Artificial Intelligence (AI) in Supply Chain
 - 6.3.2 Adoption of Big Data Analytics and IoT
 - 6.3.3 Advancements in Industrial-Grade Digital Technologies
 - 6.3.4 Increasing Demand from Aviation Industry
 - 6.3.5 Inclination Towards Technological Advancement and Investments

7. COMPETITIVE LANDSCAPE

- 7.1 Global Supply Chain Management Software Players by Market Share
- 7.2 Global Supply Chain Management Software Market Players: Key Comparison

8. COMPANY PROFILES

- 8.1 Oracle Corporation
 - 8.1.1 Business Overview
 - 8.1.2 Operating Segments
 - 8.1.3 Business Strategy
- 8.2 SAP SE
 - 8.2.1 Business Overview
 - 8.2.2 Operating Segments
 - 8.2.3 Business Strategy
- 8.3 International Business Machines Corporation (IBM)
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segments
 - 8.3.3 Business Strategy
- 8.4 Descartes Systems Group Inc.
 - 8.4.1 Business Overview
 - 8.4.2 Revenues by Geographic Location
 - 8.4.3 Business Strategies
- 8.5 E2open Parent Holdings, Inc.
 - 8.5.1 Business Overview
 - 8.5.2 Revenue by Sources

- 8.5.3 Business Strategy
- 8.6 Kinaxis Inc.
 - 8.6.1 Business Overview
 - 8.6.2 Revenue by Geographic Location
 - 8.6.3 Business Strategies
- 8.7 American Software, Inc. (Logility)
 - 8.7.1 Business Overview
 - 8.7.2 Operating Segments
 - 8.7.3 Business Strategy
- 8.8 Infor Global Solutions Inc.
 - 8.8.1 Business Overview
 - 8.8.2 Business Strategies
- 8.9 Coupa Software Inc.
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategies
- 8.10 Epicor Software Corporation
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategies
- 8.11 K?rber AG
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategies
- 8.12 Blue Yonder Group, Inc.
 - 8.12.1 Business Overview
 - 8.12.2 Business Strategies
- 8.13 O9 Solutions Inc.
 - 8.13.1 Business Overview
 - 8.13.2 Business Strategies

List Of Figures

LIST OF FIGURES

Figure 1: Advantages of Supply Chain Management Software

Figure 2: Supply Chain Management Software Segmentation

Figure 3: Supply Chain Management Software Segmentation by Industry Vertical

Figure 4: Global Supply Chain Management Software Market by Value; 2018-2022
(US\$ Billion)

Figure 5: Global Supply Chain Management Software Market by Value; 2023-2028
(US\$ Billion)

Figure 6: Global Supply Chain Management Software Market by Deployment; 2022
(Percentage, %)

Figure 7: Global Supply Chain Management Software Market by Enterprise Size; 2022
(Percentage, %)

Figure 8: Global Supply Chain Management Software Market by Solution; 2022
(Percentage, %)

Figure 9: Global Supply Chain Management Software Market by Industry Vertical; 2022
(Percentage, %)

Figure 10: Global Supply Chain Management Software Market by Region; 2022
(Percentage, %)

Figure 11: Global On Premise Supply Chain Management Software Market By Value;
2018-2022 (US\$ Billion)

Figure 12: Global On Premise Supply Chain Management Software Market By Value;
2023-2028 (US\$ Billion)

Figure 13: Global Cloud Supply Chain Management Software Market By Value;
2018-2022 (US\$ Billion)

Figure 14: Global Cloud Supply Chain Management Software Market By Value;
2023-2028 (US\$ Billion)

Figure 15: Global Large Enterprises Supply Chain Management Software Market By
Value; 2018-2022 (US\$ Billion)

Figure 16: Global Large Enterprises Supply Chain Management Software Market By
Value; 2023-2028 (US\$ Billion)

Figure 17: Global Small and Medium Enterprises (SMEs) Supply Chain Management
Software Market By Value; 2018-2022 (US\$ Billion)

Figure 18: Global Small and Medium Enterprises (SMEs) Supply Chain Management
Software Market By Value; 2023-2028 (US\$ Billion)

Figure 19: Global Manufacturing Execution System Supply Chain Management
Software Market By Value; 2018-2022 (US\$ Billion)

Figure 20: Global Manufacturing Execution System Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 21: Global Transportation Management System Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 22: Global Transportation Management System Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 23: Global Procurement and Sourcing Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 24: Global Procurement and Sourcing Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 25: Global Warehouse Management System Management Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 26: Global Warehouse Management System Management Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 27: Global Supply Chain Planning Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 28: Global Supply Chain Planning Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 29: Global Manufacturing Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 30: Global Manufacturing Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 31: Global Food & Beverages Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 32: Global Food & Beverages Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 33: Global Transportation & Logistics Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 34: Global Transportation & Logistics Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 35: Global Retail & E-commerce Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 36: Global Retail & E-commerce Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 37: Global Healthcare Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 38: Global Healthcare Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 39: Global Automotive Supply Chain Management Software Market By Value;

2018-2022 (US\$ Million)

Figure 40: Global Automotive Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 41: Global Other Industries Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 42: Global Other Industries Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 43: North America Supply Chain Management Software Market by Value; 2018-2022 (US\$ Billion)

Figure 44: North America Supply Chain Management Software Market by Value; 2023-2028 (US\$ Billion)

Figure 45: North America Supply Chain Management Software Market by Region; 2022 (Percentage, %)

Figure 46: The US Supply Chain Management Software Market by Value; 2018-2022 (US\$ Billion)

Figure 47: The US Supply Chain Management Software Market by Value; 2023-2028 (US\$ Billion)

Figure 48: The US Supply Chain Management Software Market by Deployment; 2022 (Percentage, %)

Figure 49: The US On Premise Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 50: The US On Premise Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 51: The US Cloud Supply Chain Management Software Market By Value; 2018-2022 (US\$ Billion)

Figure 52: The US Cloud Supply Chain Management Software Market By Value; 2023-2028 (US\$ Billion)

Figure 53: Canada Supply Chain Management Software Market by Value; 2018-2022 (US\$ Million)

Figure 54: Canada Supply Chain Management Software Market by Value; 2023-2028 (US\$ Billion)

Figure 55: Mexico Supply Chain Management Software Market by Value; 2018-2022 (US\$ Million)

Figure 56: Mexico Supply Chain Management Software Market by Value; 2023-2028 (US\$ Million)

Figure 57: Europe Supply Chain Management Software Market by Value; 2018-2022 (US\$ Billion)

Figure 58: Europe Supply Chain Management Software Market by Value; 2023-2028 (US\$ Billion)

Figure 59: Europe Supply Chain Management Software Market by Region; 2022
(Percentage, %)

Figure 60: United Kingdom Supply Chain Management Software Market by Value;
2018-2022 (US\$ Billion)

Figure 61: United Kingdom Supply Chain Management Software Market by Value;
2023-2028 (US\$ Billion)

Figure 62: Germany Supply Chain Management Software Market by Value; 2018-2022
(US\$ Billion)

Figure 63: Germany Supply Chain Management Software Market by Value; 2023-2028
(US\$ Billion)

Figure 64: France Supply Chain Management Software Market by Value; 2018-2022
(US\$ Million)

Figure 65: France Supply Chain Management Software Market by Value; 2023-2028
(US\$ Billion)

Figure 66: Italy Supply Chain Management Software Market by Value; 2018-2022 (US\$
Million)

Figure 67: Italy Supply Chain Management Software Market by Value; 2023-2028 (US\$
Million)

Figure 68: Spain Supply Chain Management Software Market by Value; 2018-2022
(US\$ Million)

Figure 69: Spain Supply Chain Management Software Market by Value; 2023-2028
(US\$ Million)

Figure 70: Rest of Europe Supply Chain Management Software Market by Value;
2018-2022 (US\$ Billion)

Figure 71: Rest of Europe Supply Chain Management Software Market by Value;
2023-2028 (US\$ Billion)

Figure 72: Asia Pacific Supply Chain Management Software Market by Value;
2018-2022 (US\$ Billion)

Figure 73: Asia Pacific Supply Chain Management Software Market by Value;
2023-2028 (US\$ Billion)

Figure 74: Asia Pacific Supply Chain Management Software Market by Region; 2022
(Percentage, %)

Figure 75: China Supply Chain Management Software Market by Value, 2018-2022
(US\$ Billion)

Figure 76: China Supply Chain Management Software Market by Value; 2023-2028
(US\$ Billion)

Figure 77: Japan Supply Chain Management Software Market by Value, 2018-2022
(US\$ Million)

Figure 78: Japan Supply Chain Management Software Market by Value; 2023-2028

(US\$ Billion)

Figure 79: South Korea Supply Chain Management Software Market by Value, 2018-2022 (US\$ Million)

Figure 80: South Korea Supply Chain Management Software Market by Value; 2023-2028 (US\$ Billion)

Figure 81: India Supply Chain Management Software Market by Value, 2018-2022 (US\$ Million)

Figure 82: India Supply Chain Management Software Market by Value; 2023-2028 (US\$ Million)

Figure 83: Rest of Asia Pacific Supply Chain Management Software Market by Value, 2018-2022 (US\$ Million)

Figure 84: Rest of Asia Pacific Supply Chain Management Software Market by Value; 2023-2028 (US\$ Billion)

Figure 85: Rest of the World (ROW) Supply Chain Management Software Market by Value; 2018-2022 (US\$ Billion)

Figure 86: Rest of the World (ROW) Supply Chain Management Software Market by Value; 2023-2028 (US\$ Billion)

Figure 87: Global Retail E-commerce Sales, 2021-2026 (US\$ Trillion)

Figure 88: Global Artificial Intelligence Market Size; 2021-2030 (US \$Billion)

Figure 89: Global Active IoT Connections; 2019-2025 (Billion)

Figure 90: Global Supply Chain Management Software Players by Market Share; 2022 (Percentage, %)

Figure 91: Oracle Corporation Revenue by Segment; 2022 (Percentage, %)

Figure 92: SAP SE Revenue by Operating Segments; 2022 (Percentage, %)

Figure 93: International Business Machines Corporation (IBM) Revenue by Segment; 2022 (Percentage, %)

Figure 94: Descartes Systems Group Inc. Total Revenues by Geographic Location, 2022 (Percentage, %)

Figure 95: E2open Parent Holdings, Inc. Revenue by Sources; 2022 (Percentage, %)

Figure 96: Kinaxis Inc. Revenue by Geographic Location, 2022 (Percentage, %)

Figure 97: American Software, Inc. Revenue by Segments; 2022 (Percentage, %)

Table 1: Global Supply Chain Management Software Market Players: Key Comparison

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