

Global Supply Chain Management (SCM) Software Market - Applications, Deployment Types, Company Types, and Industry Sectors

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Abstracts

Global Supply Chain Management (SCM) Software Market Trends and Outlook

The global Supply Chain Management (SCM) software market is entering a transformative era, fueled by enterprise-wide digitization, geopolitical uncertainty, and increasing demands for resilience and visibility. Valued at US\$23 billion in 2024, the market is projected to more than double to US\$46 billion by 2030, reflecting a strong CAGR of 12.4%. This growth trajectory underscores the urgency among organizations to modernize fragmented supply chain infrastructures using cloud-native, intelligent platforms that can orchestrate planning, procurement, logistics, and compliance across global networks.

Key drivers behind this expansion include the widespread adoption of cloud-first deployment models, the integration of AI and machine learning for predictive decision-making, and mounting regulatory pressure for sustainability and traceability. Vendors like SAP, Oracle, and Kinaxis are responding with increasingly modular and interoperable platforms that offer embedded analytics, real-time tracking, and scenario planning. SaaS-based solutions are gaining particular traction, especially among mid-sized businesses, by enabling faster implementation, scalable access to advanced capabilities, and lower total cost of ownership.

Supply Chain Management (SCM) Software Regional Market Analysis

North America was the largest regional market in 2024, accounting for 39.2% of global SCM software revenues. Its dominance is underpinned by widespread cloud adoption, strong enterprise investments in AI-driven supply chain control towers, and regulatory

drivers around traceability and risk. By 2030, North America's market is projected to reach US\$16.5 billion, maintaining its lead despite slightly slower growth compared to emerging regions. Asia-Pacific, meanwhile, is set to outpace all other regions with a remarkable CAGR of 15.8% from 2024 to 2030, expanding to over US\$14 billion. This acceleration is fueled by surging digital transformation efforts across China, India, and Southeast Asia, where manufacturers and logistics firms are deploying cloud-native, AI-powered platforms to modernize planning and execution. The region's emphasis on localized production, e-commerce fulfillment, and supply resilience is further intensifying demand for advanced SCM software.

Supply Chain Management (SCM) Software Market Analysis by Deployment Type

Cloud-based SCM software dominated the market in 2024 with revenues share of nearly 61% of the global total. This segment's lead is driven by the rapid shift to SaaS platforms offering faster deployment, lower upfront costs, and better scalability. By 2030, cloud deployments are forecast to surge past US\$30.2 billion, expanding at a CAGR of 13.8%, the fastest among deployment models. Growing demand from mid-sized firms and the rise of AI-native platforms are reinforcing this trend. In contrast, on-premise SCM software remains significant but is expanding at a slower CAGR. Its continued relevance is attributed to data sovereignty requirements, particularly in heavily regulated industries such as defense, pharmaceuticals, and government logistics. However, modernization pressures and cloud migration strategies are gradually phasing out legacy installations.

Supply Chain Management (SCM) Software Market Analysis by Company Type

Large enterprises commanded the bulk of SCM software spending in 2024, contributing 67% of global market value. Their dominance stems from complex global supply networks that require integrated, end-to-end platforms from vendors like SAP, Oracle, and Infor. By 2030, this segment is expected to grow steadily as enterprises expand investments in AI-driven orchestration, sustainability compliance, and risk mitigation tools. Small and medium-sized enterprises (SMEs), while smaller in absolute value, represent the fastest-growing segment with a CAGR of 14.2% through 2030. This rapid expansion is driven by increased availability of cloud-native SCM platforms with flexible pricing, improved UX, and low-code customization-making advanced capabilities more accessible to resource-constrained businesses.

Supply Chain Management (SCM) Software Market Analysis by Application Type

Supply chain planning remained the leading application category in 2024, cornering approximately 40.6% of the global market. Its position reflects enterprise reliance on integrated planning suites to align demand, supply, and production amid ongoing volatility. This segment is projected to grow steadily as digital twins, predictive forecasting, and scenario modeling continue to evolve. Transportation management systems (TMS) are the fastest-growing application, expanding at a CAGR of 15.6% between 2024 and 2030. TMS is set to more than double to US\$5.36 billion by the end of the forecast period. Growth is being driven by rising last-mile logistics complexity, real-time route optimization, and increased demand for freight visibility across global trade lanes. Closely following is the procurement segment. This surge reflects mounting regulatory pressure for supplier transparency, ethical sourcing, and ESG compliance, trends that are prompting businesses to upgrade legacy procurement systems with intelligent sourcing and contract management capabilities.

Supply Chain Management (SCM) Software Market Analysis by Industry Sector

Retail and consumer goods was the largest end-use vertical in 2024, occupying 24.1% of global SCM software revenues. This leadership position is driven by the sector's demand for multi-channel inventory visibility, agile fulfillment, and AI-based demand forecasting. Transportation and logistics is projected to be the fastest-growing industry segment, with a CAGR of 14.9% between 2024 and 2030. Growth is being propelled by rising investment in real-time freight visibility, dynamic routing, and control tower platforms that enable predictive insights and agile response. Closely following is healthcare and pharmaceuticals at a CAGR of 12.4% driven by the sector's push for cold chain monitoring, regulatory compliance, and supply chain resilience following pandemic-era disruptions.

Supply Chain Management (SCM) Software Market Report Scope

This global report on Supply Chain Management (SCM) Software market analyzes the global and regional market based on Deployment Type, Company Type, Application Type, and Industry Sector for the period 2021-2030 with projection from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2024

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 15+

Supply Chain Management (SCM) Software Market by Geographic Region

North America (The United States, Canada and Mexico)

Europe (Germany, the United Kingdom, France, Italy, the Netherlands, Spain, Russia, Switzerland and Rest of Europe)

Asia-Pacific (China, Japan, India, Australia, Singapore, South Korea and Rest of Asia-Pacific)

South America (Brazil, Argentina, Colombia, Chile, Peru and Rest of South America)

Middle East & Africa (the United Arab Emirates, South Africa, Egypt, Saudi Arabia, Morocco, Kuwait, Qatar and Rest of Middle East & Africa)

Supply Chain Management (SCM) Software Market by Deployment Type

Cloud

On-Premise

Supply Chain Management (SCM) Software Market by Company Type

Large Enterprises

Small & Medium-sized Enterprises (SMEs)

Supply Chain Management (SCM) Software Market by Application Type

Supply Chain Planning

Procurement

Warehouse Management System

Transportation Management System

Other Applications

Supply Chain Management (SCM) Software Market by Industry Sector

Transportation & Logistics

Manufacturing

Retail & Consumer Goods

Healthcare & Pharmaceuticals

Food & Beverages

Automotive

Other Industry Sectors

Contents

PART A: GLOBAL MARKET PERSPECTIVE

1. EXECUTIVE SUMMARY

A Roundup on Supply Chain Management (SCM) Software Applications

Market Segmentation for Supply Chain Management (SCM) Software

Deployment Types

Company Types based on Size

SCM Application Types

Industry Sectors

Key Trends in Supply Chain Management (SCM) Software Market

2. INDUSTRY LANDSCAPE

Global Supply Chain Management (SCM) Software Market Outlook

Comprehensive Supply Chain Management (SCM) Software Industry Analysis - Growth

Drivers and Inhibitors

Growth Drivers

Growth Inhibitors

Market Entry Strategies for Supply Chain Management (SCM) Software Industry

Startup Strategies for Supply Chain Management (SCM) Software Industry

SWOT Analysis of Supply Chain Management (SCM) Software Industry

Strengths

Weaknesses

Opportunities

Threats

Porter's Five Forces Analysis

PESTEL Analysis

3. COMPETITIVE LANDSCAPE

Market Positioning of Key Supply Chain Management (SCM) Software Companies

Market Share Analysis of Supply Chain Management (SCM) Software Companies

SWOT Analysis of Key Players in the Supply Chain Management (SCM) Software Industry

Key Market Players

Blue Yonder Group, Inc.

Coupa Software Inc.
E2open, LLC
Epicor Software Corporation
GEP Worldwide
HighJump Software Inc.
IBM Corporation
Infor Inc.
Ivalua Inc.
JDA Software Group Inc.
Kinaxis Inc.
Logility Inc.
Manhattan Associates, Inc.
Oracle Corporation
QAD Inc.
SAP SE
Syspro
The Descartes Systems Group Inc.
WiseTech Global Limited

4. KEY BUSINESS & PRODUCT TRENDS

5. GLOBAL MARKET OVERVIEW

Global Supply Chain Management (SCM) Software Market Overview by Deployment Type

Supply Chain Management (SCM) Software Deployment Type Market Overview by Global Region

Cloud

On-Premise

Global Supply Chain Management (SCM) Software Market Overview by Company Type

Supply Chain Management (SCM) Software Company Type Market Overview by Global Region

Large Enterprises

Small & Medium-sized Enterprises (SMEs)

Global Supply Chain Management (SCM) Software Market Overview by Application Type

Supply Chain Management (SCM) Software Application Type Market Overview by Global Region

Supply Chain Planning

Procurement
Warehouse Management System
Transportation Management System
Other Applications

Global Supply Chain Management (SCM) Software Market Overview by Industry Sector
Supply Chain Management (SCM) Software Industry Sector Market Overview by
Global Region

Transportation & Logistics
Manufacturing
Retail & Consumer Goods
Healthcare & Pharmaceuticals
Food & Beverages
Automotive
Other Industry Sectors

PART B: REGIONAL MARKET PERSPECTIVE

Global Supply Chain Management (SCM) Software Market Overview by Geographic
Region

REGIONAL MARKET OVERVIEW

6. NORTH AMERICA

North American Supply Chain Management (SCM) Software Market Overview by
Geographic Region
North American Supply Chain Management (SCM) Software Market Overview by
Deployment Type
North American Supply Chain Management (SCM) Software Market Overview by
Company Type
North American Supply Chain Management (SCM) Software Market Overview by
Application Type
North American Supply Chain Management (SCM) Software Market Overview by
Industry Sector
Country-wise Analysis of North American Supply Chain Management (SCM) Software
Market

THE UNITED STATES

United States Supply Chain Management (SCM) Software Market Overview by
Deployment Type

United States Supply Chain Management (SCM) Software Market Overview by Company Type

United States Supply Chain Management (SCM) Software Market Overview by Application Type

United States Supply Chain Management (SCM) Software Market Overview by Industry Sector

CANADA

Canadian Supply Chain Management (SCM) Software Market Overview by Deployment Type

Canadian Supply Chain Management (SCM) Software Market Overview by Company Type

Canadian Supply Chain Management (SCM) Software Market Overview by Application Type

Canadian Supply Chain Management (SCM) Software Market Overview by Industry Sector

MEXICO

Mexican Supply Chain Management (SCM) Software Market Overview by Deployment Type

Mexican Supply Chain Management (SCM) Software Market Overview by Company Type

Mexican Supply Chain Management (SCM) Software Market Overview by Application Type

Mexican Supply Chain Management (SCM) Software Market Overview by Industry Sector

7. EUROPE

European Supply Chain Management (SCM) Software Market Overview by Geographic Region

European Supply Chain Management (SCM) Software Market Overview by Deployment Type

European Supply Chain Management (SCM) Software Market Overview by Company Type

European Supply Chain Management (SCM) Software Market Overview by Application Type

European Supply Chain Management (SCM) Software Market Overview by Industry Sector

Country-wise Analysis of European Supply Chain Management (SCM) Software Market

GERMANY

German Supply Chain Management (SCM) Software Market Overview by
Deployment Type

German Supply Chain Management (SCM) Software Market Overview by Company
Type

German Supply Chain Management (SCM) Software Market Overview by Application
Type

German Supply Chain Management (SCM) Software Market Overview by Industry
Sector

THE UNITED KINGDOM

United Kingdom Supply Chain Management (SCM) Software Market Overview by
Deployment Type

United Kingdom Supply Chain Management (SCM) Software Market Overview by
Company Type

United Kingdom Supply Chain Management (SCM) Software Market Overview by
Application Type

United Kingdom Supply Chain Management (SCM) Software Market Overview by
Industry Sector

FRANCE

French Supply Chain Management (SCM) Software Market Overview by Deployment
Type

French Supply Chain Management (SCM) Software Market Overview by Company
Type

French Supply Chain Management (SCM) Software Market Overview by Application
Type

French Supply Chain Management (SCM) Software Market Overview by Industry
Sector

ITALY

Italian Supply Chain Management (SCM) Software Market Overview by Deployment
Type

Italian Supply Chain Management (SCM) Software Market Overview by Company
Type

Italian Supply Chain Management (SCM) Software Market Overview by Application
Type

Italian Supply Chain Management (SCM) Software Market Overview by Industry
Sector

THE NETHERLANDS

Dutch Supply Chain Management (SCM) Software Market Overview by Deployment
Type

Dutch Supply Chain Management (SCM) Software Market Overview by Company

Type

Dutch Supply Chain Management (SCM) Software Market Overview by Application

Type

Dutch Supply Chain Management (SCM) Software Market Overview by Industry

Sector

SPAIN

Spanish Supply Chain Management (SCM) Software Market Overview by

Deployment Type

Spanish Supply Chain Management (SCM) Software Market Overview by Company

Type

Spanish Supply Chain Management (SCM) Software Market Overview by Application

Type

Spanish Supply Chain Management (SCM) Software Market Overview by Industry

Sector

RUSSIA

Russian Supply Chain Management (SCM) Software Market Overview by

Deployment Type

Russian Supply Chain Management (SCM) Software Market Overview by Company

Type

Russian Supply Chain Management (SCM) Software Market Overview by Application

Type

Russian Supply Chain Management (SCM) Software Market Overview by Industry

Sector

SWITZERLAND

Swiss Supply Chain Management (SCM) Software Market Overview by Deployment

Type

Swiss Supply Chain Management (SCM) Software Market Overview by Company

Type

Swiss Supply Chain Management (SCM) Software Market Overview by Application

Type

Swiss Supply Chain Management (SCM) Software Market Overview by Industry

Sector

REST OF EUROPE

Rest of Europe Supply Chain Management (SCM) Software Market Overview by

Deployment Type

Rest of Europe Supply Chain Management (SCM) Software Market Overview by

Company Type

Rest of Europe Supply Chain Management (SCM) Software Market Overview by

Application Type

Rest of Europe Supply Chain Management (SCM) Software Market Overview by Industry Sector

8. ASIA-PACIFIC

Asia-Pacific Supply Chain Management (SCM) Software Market Overview by Geographic Region

Asia-Pacific Supply Chain Management (SCM) Software Market Overview by Deployment Type

Asia-Pacific Supply Chain Management (SCM) Software Market Overview by Company Type

Asia-Pacific Supply Chain Management (SCM) Software Market Overview by Application Type

Asia-Pacific Supply Chain Management (SCM) Software Market Overview by Industry Sector

Country-wise Analysis of Asia-Pacific Supply Chain Management (SCM) Software Market

CHINA

Chinese Supply Chain Management (SCM) Software Market Overview by Deployment Type

Chinese Supply Chain Management (SCM) Software Market Overview by Company Type

Chinese Supply Chain Management (SCM) Software Market Overview by Application Type

Chinese Supply Chain Management (SCM) Software Market Overview by Industry Sector

JAPAN

Japanese Supply Chain Management (SCM) Software Market Overview by Deployment Type

Japanese Supply Chain Management (SCM) Software Market Overview by Company Type

Japanese Supply Chain Management (SCM) Software Market Overview by Application Type

Japanese Supply Chain Management (SCM) Software Market Overview by Industry Sector

INDIA

Indian Supply Chain Management (SCM) Software Market Overview by Deployment Type

Indian Supply Chain Management (SCM) Software Market Overview by Company

Type

Indian Supply Chain Management (SCM) Software Market Overview by Application

Type

Indian Supply Chain Management (SCM) Software Market Overview by Industry

Sector

AUSTRALIA

Australia Supply Chain Management (SCM) Software Market Overview by

Deployment Type

Australia Supply Chain Management (SCM) Software Market Overview by Company

Type

Australia Supply Chain Management (SCM) Software Market Overview by

Application Type

Australia Supply Chain Management (SCM) Software Market Overview by Industry

Sector

SINGAPORE

Singaporean Supply Chain Management (SCM) Software Market Overview by

Deployment Type

Singaporean Supply Chain Management (SCM) Software Market Overview by

Company Type

Singaporean Supply Chain Management (SCM) Software Market Overview by

Application Type

Singaporean Supply Chain Management (SCM) Software Market Overview by

Industry Sector

SOUTH KOREA

South Korean Supply Chain Management (SCM) Software Market Overview by

Deployment Type

South Korean Supply Chain Management (SCM) Software Market Overview by

Company Type

South Korean Supply Chain Management (SCM) Software Market Overview by

Application Type

South Korean Supply Chain Management (SCM) Software Market Overview by

Industry Sector

REST OF ASIA-PACIFIC

Rest of Asia-Pacific Supply Chain Management (SCM) Software Market Overview by

Deployment Type

Rest of Asia-Pacific Supply Chain Management (SCM) Software Market Overview by

Company Type

Rest of Asia-Pacific Supply Chain Management (SCM) Software Market Overview by

Application Type

Rest of Asia-Pacific Supply Chain Management (SCM) Software Market Overview by Industry Sector

9. SOUTH AMERICA

South American Supply Chain Management (SCM) Software Market Overview by Geographic Region

South American Supply Chain Management (SCM) Software Market Overview by Deployment Type

South American Supply Chain Management (SCM) Software Market Overview by Company Type

South American Supply Chain Management (SCM) Software Market Overview by Application Type

South American Supply Chain Management (SCM) Software Market Overview by Industry Sector

Country-wise Analysis of South American Supply Chain Management (SCM) Software Market

BRAZIL

Brazilian Supply Chain Management (SCM) Software Market Overview by Deployment Type

Brazilian Supply Chain Management (SCM) Software Market Overview by Company Type

Brazilian Supply Chain Management (SCM) Software Market Overview by Application Type

Brazilian Supply Chain Management (SCM) Software Market Overview by Industry Sector

ARGENTINA

Argentine Supply Chain Management (SCM) Software Market Overview by Deployment Type

Argentine Supply Chain Management (SCM) Software Market Overview by Company Type

Argentine Supply Chain Management (SCM) Software Market Overview by Application Type

Argentine Supply Chain Management (SCM) Software Market Overview by Industry Sector

COLOMBIA

Colombian Supply Chain Management (SCM) Software Market Overview by Deployment Type

Colombian Supply Chain Management (SCM) Software Market Overview by

Company Type

Colombian Supply Chain Management (SCM) Software Market Overview by

Application Type

Colombian Supply Chain Management (SCM) Software Market Overview by Industry

Sector

CHILE

Chilean Supply Chain Management (SCM) Software Market Overview by Deployment

Type

Chilean Supply Chain Management (SCM) Software Market Overview by Company

Type

Chilean Supply Chain Management (SCM) Software Market Overview by Application

Type

Chilean Supply Chain Management (SCM) Software Market Overview by Industry

Sector

PERU

Peruvian Supply Chain Management (SCM) Software Market Overview by

Deployment Type

Peruvian Supply Chain Management (SCM) Software Market Overview by Company

Type

Peruvian Supply Chain Management (SCM) Software Market Overview by

Application Type

Peruvian Supply Chain Management (SCM) Software Market Overview by Industry

Sector

REST OF SOUTH AMERICA

Rest of South America Supply Chain Management (SCM) Software Market Overview
by Deployment Type

Rest of South America Supply Chain Management (SCM) Software Market Overview
by Company Type

Rest of South America Supply Chain Management (SCM) Software Market Overview
by Application Type

Rest of South America Supply Chain Management (SCM) Software Market Overview
by Industry Sector

10. MIDDLE EAST & AFRICA

Middle East & Africa Supply Chain Management (SCM) Software Market Overview by
Geographic Region

Middle East & Africa Supply Chain Management (SCM) Software Market Overview by
Deployment Type

Middle East & Africa Supply Chain Management (SCM) Software Market Overview by Company Type

Middle East & Africa Supply Chain Management (SCM) Software Market Overview by Application Type

Middle East & Africa Supply Chain Management (SCM) Software Market Overview by Industry Sector

Country-wise Analysis of Middle East & Africa Supply Chain Management (SCM) Software Market

THE UNITED ARAB EMIRATES

United Arab Emirates Supply Chain Management (SCM) Software Market Overview by Deployment Type

United Arab Emirates Supply Chain Management (SCM) Software Market Overview by Company Type

United Arab Emirates Supply Chain Management (SCM) Software Market Overview by Application Type

United Arab Emirates Supply Chain Management (SCM) Software Market Overview by Industry Sector

SOUTH AFRICA

South African Supply Chain Management (SCM) Software Market Overview by Deployment Type

South African Supply Chain Management (SCM) Software Market Overview by Company Type

South African Supply Chain Management (SCM) Software Market Overview by Application Type

South African Supply Chain Management (SCM) Software Market Overview by Industry Sector

EGYPT

Egyptian Supply Chain Management (SCM) Software Market Overview by Deployment Type

Egyptian Supply Chain Management (SCM) Software Market Overview by Company Type

Egyptian Supply Chain Management (SCM) Software Market Overview by Application Type

Egyptian Supply Chain Management (SCM) Software Market Overview by Industry Sector

SAUDI ARABIA

Saudi Arabian Supply Chain Management (SCM) Software Market Overview by Deployment Type

Saudi Arabian Supply Chain Management (SCM) Software Market Overview by

Company Type

Saudi Arabian Supply Chain Management (SCM) Software Market Overview by Application Type

Saudi Arabian Supply Chain Management (SCM) Software Market Overview by Industry Sector

MOROCCO

Moroccan Supply Chain Management (SCM) Software Market Overview by Deployment Type

Moroccan Supply Chain Management (SCM) Software Market Overview by Company Type

Moroccan Supply Chain Management (SCM) Software Market Overview by Application Type

Moroccan Supply Chain Management (SCM) Software Market Overview by Industry Sector

KUWAIT

Kuwaiti Supply Chain Management (SCM) Software Market Overview by Deployment Type

Kuwaiti Supply Chain Management (SCM) Software Market Overview by Company Type

Kuwaiti Supply Chain Management (SCM) Software Market Overview by Application Type

Kuwaiti Supply Chain Management (SCM) Software Market Overview by Industry Sector

QATAR

Qatari Supply Chain Management (SCM) Software Market Overview by Deployment Type

Qatari Supply Chain Management (SCM) Software Market Overview by Company Type

Qatari Supply Chain Management (SCM) Software Market Overview by Application Type

Qatari Supply Chain Management (SCM) Software Market Overview by Industry Sector

REST OF MIDDLE EAST & AFRICA

Rest of Middle East & Africa Supply Chain Management (SCM) Software Market Overview by Deployment Type

Rest of Middle East & Africa Supply Chain Management (SCM) Software Market Overview by Company Type

Rest of Middle East & Africa Supply Chain Management (SCM) Software Market Overview by Application Type

Rest of Middle East & Africa Supply Chain Management (SCM) Software Market
Overview by Industry Sector

PART C: ANNEXURE

RESEARCH METHODOLOGY

FEEDBACK

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