

# Supply Chain Management Software Market Size, Share, Trends and Forecast by Solution Type, Deployment Mode, Organization Size, Industry Vertical, and Region, 2026-2034

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## Abstracts

The global supply chain management software market size was valued at USD 23.2 Billion in 2025. Looking forward, IMARC Group estimates the market to reach USD 54.8 Billion by 2034, exhibiting a CAGR of 10.02% during 2026-2034. North America currently dominates the market, holding a significant market share of over 39.2% in 2025. The market is primarily driven by the growing application in small and medium-sized enterprises (SMEs), increasing adoption in the e-commerce industry, and rising employment in the healthcare sector to manage medical supply distribution.

The rising demand for cloud-based SCM software to expedite the manufacturing cycle, ensure quality, enhance scalability, and tackle disruption, is contributing to the growth of the market. In addition to this, the rapid utilization of SCM software among small and medium-sized enterprises (SMEs) on account of the rapid business expansion, globalized supply chain, and geographically expanded selling destinations is creating a favorable market outlook. Apart from this, rapid utilization of SCM software in the healthcare industry to streamline medical supply distribution and inventory supervision is supporting the growth of the market. Additionally, the rising demand for SCM software in the aviation industry to manage crew, flights, passenger logistics, and aircraft is strengthening the growth of the market. For example, IFS announced on July 12, 2024, that it had acquired EmpowerMX, a provider of AI-powered aircraft maintenance software with a focus on airframe maintenance, repair, and overhaul solutions. The EmpowerMX software suite helps with supply chain management, configuration management, heavy maintenance, and planning, among other things. This strategic move aims to enhance IFS's offerings in the aerospace and defense sectors by

integrating EmpowerMX's technology to improve efficiencies, production control, turnaround times, and maintenance costs.

The United States stands out as a key regional market, majorly driven by the increasing demand for operational efficiency as per the changing consumer expectations. In line with this, considerable growth in e-commerce and omnichannel retailing to provide faster delivery and seamless services is also a factor that increases the demand for robust and agile supply chain solutions. Besides this, an enhanced emphasis on sustainable development and environmentally compliant practices further compel companies to inculcate a green approach toward their supply chains, hence compelling the need for specialized software. In addition to this, the increasing usage of SCM software in steel companies to enhance procurement, inventory management, and logistics operations for real-time insights, automation, and analytics, is contributing to the overall market expansion. For example, on December 17, 2024, U.S. Steel announced its selection of GEP's procurement and supply chain software to drive a comprehensive procurement transformation across its North American operations. The implementation aims to optimize procurement processes, enhance supply chain efficiency, and achieve cost savings. This strategic move aligns with U.S. Steel's commitment to innovation and operational excellence in its supply chain management.

### Supply Chain Management Software Market Trends:

#### Increasing Demand for Automation and Efficiency

The global supply chain management software market is growing substantially with concerns for streamlining, cost-cutting, and efficiency in businesses. With the automation of key processes and real-time insights, SCM software enhances the visibility of resources and cuts down on manual mistakes, which fast-tracks decision-making and forms better resource management and optimized supply chain performance. Notably, Fictiv Technology observed that in 2023, 49% of companies focused on speeding up new product innovation, a significant growth from just 11% in 2022. This reflects the increasing dependence on SCM software in enhancing operational agility and to support faster time-to-market. It has become a prime growth enabler for the industry.

#### E-commerce Growth and Globalization

The complexity of inventory management and logistics is increased by the rapid expansion of e-commerce and the more multinational supply chains. SCM software

answers these problems by integrating the operations of a company smoothly across regions, enhancing the tracking capability, improving the demand forecast, and smoothing the order fulfillment to meet the expectations of consumers efficiently. The expansion of mobile connectivity further fuels this growth. At the start of 2024, there were 396 million cellular mobile connections in the United States alone, with a penetration rate of 116.2% relative to the total population, as per an industry report. This penetration provides the much-needed flexibility for businesses to adopt SCM solutions empowered by mobile technologies, giving access to real-time information while fostering smooth global networks operations. The effects of increased adoption of digital commerce and sophisticated SCM software can sustain this market's growth in the coming years.

### Advancements in Data Analytics and Artificial Intelligence

The incorporation of data analytics and artificial intelligence (AI) into supply chain management (SCM) software is transforming how businesses predict demand, optimize inventory, and manage risks. With machine learning (ML) algorithms and big data, companies can make accurate decisions, reduce wastage, and ensure that the right product is available at the right time and place, thereby enhancing customer satisfaction. This technology is receiving strong traction, with over 75% of organizations that are building SCM software using advanced analytics and artificial intelligence (AI), per Buuuk, predicted to do so by 2026. This way, it becomes easier for the businesses to achieve instant insights, automate routine jobs, and react fast towards market fluctuations. Artificial intelligence (AI) powered analytics are a growth promoter for the global SCM software market.

### Supply Chain Management Software Industry Segmentation:

IMARC Group provides an analysis of the key trends in each sub-segment of the global supply chain management software market report, along with forecasts at the global, regional and country level from 2026-2034. Our report has categorized the market based on solution type, deployment mode, organization size and industry vertical.

### Analysis by Solution Type:

Transportation Management System

Warehouse Management System

Supply Chain Planning

Procurement and Sourcing

Manufacturing Execution System

Procurement and sourcing lead the market with around 36.6% of market share in 2025 due to their ability to address issues related to supplier management, cost optimization, and strategic sourcing. It helps streamline the procurement process by collaboration with the suppliers while remaining compliant with global trade regulations. The demand for procurement and sourcing software is on the rise to mitigate risks related to supplier disruptions, raw material cost volatility, and geopolitical uncertainty. The software offers advanced features that include supplier performance analytics, contract management, and automated procurement workflows, therefore making data-driven decisions and achieving cost savings. The other areas of benefit are sustainability and ethical sourcing practices. Organizations are now taking to technologies that present transparent and trackable supplier networks. The keynote in present corporate parlance is to be agile and efficient, which makes procurement and sourcing solutions an integral part of the growth of the SCM software market.

Analysis by Deployment Mode:

On-premises

Cloud-based

On-premises leads the market with around 60.5% of market share in 2025 as it runs on computers on the premises of organizations rather than at a remote option, such as cloud or server farms. In addition, the rising adoption of on-premises deployments by companies, as they do not require third-party access and provide physical control over the server to the owner, is propelling the growth of the market. Additionally, the data stored in on-premises supply chain management software is kept locally on the businesses' property and is fully supervised, allowing companies to have full control over their own information, and that is considered a decisive advantage, especially when it comes to compliance issues. Furthermore, the storage of information in on-premises supply chain software enables employees to have access to the data with on-premises solutions even when network problems will occur, and the connection to the

internet is interrupted, which is bolstering the supply chain management software market growth.

#### Analysis by Organization Size:

Small and Medium-sized Enterprises

Large Enterprises

Large enterprises lead the market with around 62.4% of market share in 2025 as the presence of supply chain complexity is comparatively higher than in small and medium-sized enterprises (SMEs). In addition to this, the rising demand for supply chain management software among large organizations, as it automates much of the physical supply chain process and provides analytics and business intelligence to organize complex processes, is propelling the growth of the market. Apart from this, the rising adoption of supply chain management software among large enterprises due to the expanding consumer and end-consumer demand through supply chains is contributing to the growth of the market. Another driver for the supply chain management software market growth is the rising need for sophisticated solutions in large organizations to help gather key business data, including levels of inventory, projected sales figures, and information about suppliers, from a diverse range of sources.

#### Analysis by Industry Vertical:

Retail and Consumer Goods

Healthcare and Pharmaceuticals

Manufacturing

Food and Beverages

Transportation and Logistics

Automotive

Others

Retail and consumer goods lead the market with around 26.1% of market share in 2025 as the demand for faster delivery, more personalized experiences, and smoother shopping channels increases as the expectations of consumers rise. Thus, SCM solutions are more crucial to the business processes of the organizations in this sector. E-commerce expansion, globalization of supply chains, and complex inventory management further support the growth. SCM software empowers retailers to cut costs and deliver more to the customer by offering advanced analytics, real-time tracking, and demand forecasting capabilities. In addition to this, increased interest in sustainability and reduction of waste in the supply chain has spurred investment in technology that increases transparency and efficiency. As competition is increasing, companies in the retail and consumer goods sector are focusing on SCM systems to stay ahead in the market and fulfill changing market requirements.

#### Regional Analysis:

##### North America

United States

Canada

##### Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

##### Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

In 2025, North America accounted for the largest market share of over 39.2% due to advanced technological adoption, a robust e-commerce ecosystem, and the presence of leading industry players. The strong regional focus on transformation in digital business across industries has increased consumer demands for faster deliveries and better clarity. The adoption of artificial intelligence (AI), machine learning (ML), and blockchains in a supply chain activity enhances efficiency and helps make decisions for businesses. In addition to this, the requirement for supply chain resilience considering disruptions like the COVID-19 pandemic has accelerated investments in cloud-based and integrated SCM platforms. North America's mature logistics infrastructure and its commitment to sustainability initiatives also contribute to the demand for innovative solutions, positioning the region as a critical driver in shaping global SCM market trends.

Key Regional Takeaways:

## United States Supply Chain Management Software Market Analysis

The United States is a significant region in the North America supply chain management software market with a market share of 70.60%, due to the rapid growth of e-commerce and the rising popularity of omni-channel shopping. As reported by the Census Bureau of the Department of Commerce, U.S. retail e-commerce sales for the third quarter of 2024 were estimated to be USD 300.1 Billion, showing an increase of 2.6% from the preceding quarter, adjusted for seasonal variation. Industry reports indicate that 44% of U.S. shoppers are omni-channel shoppers, meaning they shop across 15 product and service categories online and in-store. This calls for more sophisticated SCM solutions that can integrate inventory management, logistics, and real-time tracking across multiple sales channels. Businesses are using these systems to improve supply chain transparency, meet consumer expectations for seamless shopping experiences, and optimize operations to handle the complexities of modern retail. With the omni-channel strategies, demand for sophisticated SCM software in the U.S. will be significantly increased.

## Europe Supply Chain Management Software Market Analysis

The Europe SCM software market has been growing robustly and is fueled by digital transformation, stringent sustainability regulations, and an ever-increasing complexity in the logistics network. Due to the European Union's green deal commitment to reduce greenhouse gases by 55% by 2030, organizations have started adopting sustainable practices in supply chains. SCM software is playing a leading role in optimizing route planning and enhancing energy efficiency, with respect to sustainability goals. Moreover, the e-commerce boom is further redefining logistics in the region. In 2023, online purchases stood out among the age brackets of 25-34 and 35-44. For example, 87% and 85% of the individuals within these age brackets purchased goods or services online, Eurostat reported. This demand for seamless e-commerce operations has resulted in higher adoption of SCM software for improving inventory management, smooth order fulfillment, and transparency, thereby being the key growth driver for the European SCM software market.

## Asia Pacific Supply Chain Management Software Market Analysis

The Asia-Pacific SCM market is growing remarkably, supported by strong performances in the economies and revived global trade. The region witnesses healthy leasing activity motivated by demand from large 3PLs, e-commerce players, and special industries that

require specific types of infrastructure. Notably, the cold-storage segment is a big driver, led by the grocers and pharmaceuticals companies requiring temperature-controlled logistics. According to CBRE, about 20% of Asia-Pacific's leasing activity in Q1 2021 was for cold-chain-related requirements, a testament to the rapid growth of the sector. Such facilities are crucial in ensuring that perishable goods, vaccines, and other temperature-sensitive products are stored and transported safely. The growing focus on supply chain resilience and efficiency, combined with rising consumer expectations for fresh and fast delivery, is accelerating the adoption of SCM solutions tailored to the region's unique needs. This trend positions Asia-Pacific as a key player in global supply chain innovation.

### Latin America Supply Chain Management Software Market Analysis

Rapid growth in the e-commerce sector is the major driving force behind the supply chain management market in the Latin American region. In the year 2020 to 2021, the e-commerce market in Latin America increased by around 37% as reported by industry. Online shopping has rapidly expanded and thereby the demand for effective logistics, inventory management, and order fulfilment have increased that all rely on advanced SCM software. With e-commerce continuing to grow, regional companies are finding that adopting SCM solutions streamlines operations, optimizes delivery routes, and provides an enhanced level of overall supply chain visibility. E-commerce growth in Brazil, Mexico, and Argentina, along with increased consumer expectations for faster delivery, has created a greater need for advanced tools to manage supply chains. Thus, this trend should continue unabated toward augmenting demands on Latin American nations for SCM software.

### Middle East and Africa Supply Chain Management Software Market Analysis

The Middle East and Africa (MEA) supply chain management (SCM) software market is being driven considerably by the rapid growth of the online grocery sector in the region. Between 2021 and 2023, the online grocery market witnessed impressive growth, with the UAE leading at a CAGR of 27%, followed by Saudi Arabia at 25%, Morocco at 19%, and Egypt at 15%, according to industry reports. The boom in online grocery purchases has increased the demand for efficient and sophisticated SCM software as they manage the complexities within the inventory, order completion, and last-mile deliveries. E-commerce sites, in their endeavor to keep up with rising consumer expectations toward speed, accuracy, and convenience, are increasingly on the lookout for strong solutions for supply chains that amplify visibility, optimize routes and cut down on operational cost. The expansion of e-commerce, especially in grocery, is likely to keep SCM

software as an important tool for ensuring supply chain efficiency across the MEA region.

#### Competitive Landscape:

The market is highly competitive, primarily driven by the need for efficiency and cost optimization in real-time visibility globally within supply chains. The market comprises diverse solutions, such as inventory management, logistics, demand planning, and procurement, and key players are capitalizing on emerging technologies and strategic partnerships to gain a competitive edge, which is creating a positive market outlook. The key players are rapidly utilizing artificial intelligence (AI), blockchain, and internet of things (IoT) integration to improve the scope of automation and decision-making. Both small businesses and enterprises are competing on innovation, scalability, and customer-centric features, with a focus on their niche industry. They are also focusing on sustainability, which requires solution providers to offer less disruption and exposure to environmental concerns.

The report provides a comprehensive analysis of the competitive landscape in the supply chain management software market with detailed profiles of all major companies, including:

Blue Yonder Group, Inc.

Coupa Software Inc

e2open, LLC

Epicor Software Corporation

Infor

International Business Machines Corporation

Kinaxis Inc.

K?rber AG

Manhattan Associates

Oracle Corporation

SAP SE

The Descartes Systems Group Inc

#### Key Questions Answered in This Report

- 1.How big is the supply chain management software market?
- 2.What is the future outlook of the supply chain management software market?
- 3.What are the key factors driving the supply chain management software market?
- 4.Which region accounts for the largest supply chain management software market share?
- 5.Which are the leading companies in the global supply chain management software market?

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