

# AI in Supply Chain Market Outlook 2026-2034: Market Share, and Growth Analysis By Offering (Software, Services), By Deployment (Cloud, On-Premises, Hybrid), By Organization Size, By Application, By End-User

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## Abstracts

The AI in Supply Chain Market is valued at USD 15.54 billion in 2025 and is projected to grow at a CAGR of 29.6% to reach USD 160.3 billion by 2034.

### AI in Supply Chain Market

AI in supply chains blends machine learning, optimization, and generative tools with enterprise data to orchestrate planning, procurement, manufacturing, logistics, and after-sales services. It ingests signals from ERP/MES/WMS/TMS, supplier portals, IoT sensors, telematics, and external risk feeds to improve forecast accuracy, inventory turns, capacity utilization, service levels, and cost-to-serve. Top applications include demand sensing and shaping, autonomous replenishment, production scheduling, dynamic safety stocks, transportation planning and ETA prediction, slotting and labor allocation in DCs, supplier risk scoring, quality anomaly detection, and carbon-aware scenario planning. Current trends feature foundation-model copilots embedded in planning suites, probabilistic forecasting at granular hierarchies, multi-echelon inventory optimization, digital twins for what-if analysis, and closed-loop execution that converts recommendations into automated actions. Competitive dynamics span large enterprise software vendors, cloud hyperscalers, supply-chain specialists, and system integrators, alongside startups focused on niche problems (e.g., perishables, spare parts, ocean freight). Differentiation is shifting from algorithmic novelty to sustained business impact at network scale - measured by stability under noisy data, interpretability, and governance. Key challenges include siloed and poor-quality data, model drift under

regime change, limited change-management capacity on the shop floor, and reconciling global optimization with local incentives. As organizations mature from pilots to programmatic deployments, they favor platforms that combine configurable models with robust MDM, lineage, security controls, and ROI-linked roadmaps. Outcome-based commercial models tied to service-level adherence, inventory health, and cost metrics are gaining traction, supported by playbooks, prebuilt connectors, and cross-functional adoption frameworks.

## AI in Supply Chain Market Key Insights

From forecasts to decisions. Leading programs fuse probabilistic forecasts with optimization to set buys, allocations, and expedites - turning insight into automated, auditable actions across tiers.

Granular demand sensing wins. Short-horizon models ingest POS, promotions, weather, events, and web signals to adjust plans at SKU-location-day level, reducing whiplash from lagging ERP forecasts.

Inventory is a portfolio. Multi-echelon and multi-objective policies balance service, cost, and risk; dynamic buffers adapt to volatility, lead-time uncertainty, and supplier reliability profiles.

Scheduling goes intelligent. AI-assisted finite-capacity scheduling aligns changeovers, labor, and constraints; digital twins test scenarios (rush orders, outages) before committing to the floor.

Logistics becomes predictive. ETA models and network-aware routing reduce dwell and penalties; parcel/LTL/FTL mode selection optimizes cost and on-time, factoring constraints and carbon targets.

Quality and yield analytics. Vision and sensor models detect anomalies early; traceability joins process data to root cause scrap and warranty issues, feeding continuous-improvement loops.

Supplier risk is quantifiable. ML scores event exposure, financial health, and ESG posture; playbooks trigger dual-sourcing, safety-stock changes, or contractual mitigations automatically.

GenAI copilots accelerate work. Natural-language queries, exception

summarization, and auto-generated plans shorten decision cycles; guardrails enforce policy, approvals, and data privacy.

Data foundation determines scale. Master data, lineage, and feature stores stabilize models; standardized APIs and connectors integrate across ERP, planning, and execution layers.

Change management is decisive. Adoption hinges on explainability, role-specific UX, KPIs tied to incentives, and a run-operate model that blends data teams with planners and operators.

## AI in Supply Chain Market Regional Analysis

### North America

Adoption is led by retail, CPG, high-tech, and industrial manufacturers seeking resilience and service reliability. Enterprises emphasize hybrid architectures, cloud-edge integration for plants and DCs, and strict security and audit. Integrator ecosystems and outcome-based contracts support rapid scale-up, with strong interest in labor optimization and transportation visibility.

### Europe

Regulatory focus on sustainability, due diligence, and data governance shapes solution selection. Manufacturers and retailers adopt digital twins, carbon-aware planning, and interoperable platforms. Brownfield integration with established ERP/APS systems and documented model governance are mandatory; cross-border logistics complexity elevates network optimization.

### Asia-Pacific

Scale manufacturing, diversified supplier bases, and fast product cycles drive AI for demand sensing, capacity planning, and factory scheduling. Electronics, automotive, and e-commerce lead deployments; cost-optimized offerings support SMEs alongside advanced programs in Japan and Korea. Regional logistics hubs adopt predictive ETAs and slotting to handle peak volatility.

### Middle East & Africa

Logistics corridors, free zones, and national diversification agendas catalyze AI for port operations, distribution, and industrial supply chains. Buyers favor turnkey platforms with multilingual support, strong security, and rapid time-to-value. Harsh-environment IoT and resilience to connectivity variability are important design factors.

## South & Central America

Retail, agribusiness, and industrial sectors pursue AI to stabilize supply amid infrastructure variability. Budget sensitivity favors modular rollouts with clear KPI milestones. Regional integrators tailor data pipelines and change-management, while predictive logistics and inventory health tools address long lead times and seasonal demand patterns.

## AI in Supply Chain Market Segmentation

### By Offering

Software

Services

### By Deployment

Cloud

On-Premises

Hybrid

### By Organization Size

Large Organization

Small & Medium Organization

## By Application

Demand Planning & Forecasting

Procurement & Sourcing

Inventory Management

Production Planning & Scheduling

Warehouse & Transportation Management

Supply Chain Risk Management

Others

## By End-User

Retail

Healthcare & Pharmaceuticals

Food & Beverages

Automotive

Logistics & Transportation

Aerospace & Defense

Chemicals

Electronics & Semiconductor

Energy & Utilities

Manufacturing

## Others

### Key Market players

IBM, SAP, Oracle, Microsoft, AWS, Google Cloud, Blue Yonder, o9 Solutions, Kinaxis, Manhattan Associates, Llamasoft (Coupa), Palantir, Uptake, C3.ai, Celonis, FourKites, Project44, Interos, Siemens Digital Industries

### AI in Supply Chain Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

### AI in Supply Chain Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

### Countries Covered

North America — AI in Supply Chain market data and outlook to 2034

United States

Canada

Mexico

## Europe — AI in Supply Chain market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

## Asia-Pacific — AI in Supply Chain market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

## Middle East and Africa — AI in Supply Chain market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

## South and Central America — AI in Supply Chain market data and outlook to 2034

Brazil

Argentina

Chile

Peru

\* We can include data and analysis of additional countries on demand.

### Research Methodology

This study combines primary inputs from industry experts across the AI in Supply Chain value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

### Key Questions Addressed

What is the current and forecast market size of the AI in Supply Chain industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the AI in Supply Chain Market Report

Global AI in Supply Chain market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on AI in Supply Chain trade, costs, and supply chains

AI in Supply Chain market size, share, and outlook across 5 regions and 27 countries, 2023-2034

AI in Supply Chain market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term AI in Supply Chain market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and AI in Supply Chain supply chain analysis

AI in Supply Chain trade analysis, AI in Supply Chain market price analysis, and AI in Supply Chain supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest AI in Supply Chain market news and developments

### Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

\* The updated report will be delivered within 3 working days

## Contents

### **1. TABLE OF CONTENTS**

- 1.1 List of Tables
- 1.2 List of Figures

### **2. GLOBAL AI IN SUPPLY CHAIN MARKET SUMMARY, 2025**

- 2.1 AI in Supply Chain Industry Overview
  - 2.1.1 Global AI in Supply Chain Market Revenues (In US\$ billion)
- 2.2 AI in Supply Chain Market Scope
- 2.3 Research Methodology

### **3. AI IN SUPPLY CHAIN MARKET INSIGHTS, 2024-2034**

- 3.1 AI in Supply Chain Market Drivers
- 3.2 AI in Supply Chain Market Restraints
- 3.3 AI in Supply Chain Market Opportunities
- 3.4 AI in Supply Chain Market Challenges
- 3.5 Tariff Impact on Global AI in Supply Chain Supply Chain Patterns

### **4. AI IN SUPPLY CHAIN MARKET ANALYTICS**

- 4.1 AI in Supply Chain Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 AI in Supply Chain Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 AI in Supply Chain Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 AI in Supply Chain Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global AI in Supply Chain Market
  - 4.5.1 AI in Supply Chain Industry Attractiveness Index, 2025
  - 4.5.2 AI in Supply Chain Supplier Intelligence
  - 4.5.3 AI in Supply Chain Buyer Intelligence
  - 4.5.4 AI in Supply Chain Competition Intelligence
  - 4.5.5 AI in Supply Chain Product Alternatives and Substitutes Intelligence
  - 4.5.6 AI in Supply Chain Market Entry Intelligence

### **5. GLOBAL AI IN SUPPLY CHAIN MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034**

5.1 World AI in Supply Chain Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)

5.1 Global AI in Supply Chain Sales Outlook and CAGR Growth By Offering, 2024- 2034 (\$ billion)

5.2 Global AI in Supply Chain Sales Outlook and CAGR Growth By Deployment, 2024- 2034 (\$ billion)

5.3 Global AI in Supply Chain Sales Outlook and CAGR Growth By Organization Size, 2024- 2034 (\$ billion)

5.4 Global AI in Supply Chain Sales Outlook and CAGR Growth By Application, 2024- 2034 (\$ billion)

5.5 Global AI in Supply Chain Sales Outlook and CAGR Growth By End-User, 2024- 2034 (\$ billion)

5.6 Global AI in Supply Chain Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

## **6. ASIA PACIFIC AI IN SUPPLY CHAIN INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK**

6.1 Asia Pacific AI in Supply Chain Market Insights, 2025

6.2 Asia Pacific AI in Supply Chain Market Revenue Forecast By Offering, 2024- 2034 (USD billion)

6.3 Asia Pacific AI in Supply Chain Market Revenue Forecast By Deployment, 2024- 2034 (USD billion)

6.4 Asia Pacific AI in Supply Chain Market Revenue Forecast By Organization Size, 2024- 2034 (USD billion)

6.5 Asia Pacific AI in Supply Chain Market Revenue Forecast By Application, 2024- 2034 (USD billion)

6.6 Asia Pacific AI in Supply Chain Market Revenue Forecast By End-User, 2024- 2034 (USD billion)

6.7 Asia Pacific AI in Supply Chain Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.7.1 China AI in Supply Chain Market Size, Opportunities, Growth 2024- 2034

6.7.2 India AI in Supply Chain Market Size, Opportunities, Growth 2024- 2034

6.7.3 Japan AI in Supply Chain Market Size, Opportunities, Growth 2024- 2034

6.7.4 Australia AI in Supply Chain Market Size, Opportunities, Growth 2024- 2034

## **7. EUROPE AI IN SUPPLY CHAIN MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034**

- 7.1 Europe AI in Supply Chain Market Key Findings, 2025
- 7.2 Europe AI in Supply Chain Market Size and Percentage Breakdown By Offering, 2024- 2034 (USD billion)
- 7.3 Europe AI in Supply Chain Market Size and Percentage Breakdown By Deployment, 2024- 2034 (USD billion)
- 7.4 Europe AI in Supply Chain Market Size and Percentage Breakdown By Organization Size, 2024- 2034 (USD billion)
- 7.5 Europe AI in Supply Chain Market Size and Percentage Breakdown By Application, 2024- 2034 (USD billion)
- 7.6 Europe AI in Supply Chain Market Size and Percentage Breakdown By End-User, 2024- 2034 (USD billion)
- 7.7 Europe AI in Supply Chain Market Size and Percentage Breakdown by Country, 2024- 2034 (USD billion)
  - 7.7.1 Germany AI in Supply Chain Market Size, Trends, Growth Outlook to 2034
  - 7.7.2 United Kingdom AI in Supply Chain Market Size, Trends, Growth Outlook to 2034
  - 7.7.2 France AI in Supply Chain Market Size, Trends, Growth Outlook to 2034
  - 7.7.2 Italy AI in Supply Chain Market Size, Trends, Growth Outlook to 2034
  - 7.7.2 Spain AI in Supply Chain Market Size, Trends, Growth Outlook to 2034

## **8. NORTH AMERICA AI IN SUPPLY CHAIN MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034**

- 8.1 North America Snapshot, 2025
- 8.2 North America AI in Supply Chain Market Analysis and Outlook By Offering, 2024- 2034 (\$ billion)
- 8.3 North America AI in Supply Chain Market Analysis and Outlook By Deployment, 2024- 2034 (\$ billion)
- 8.4 North America AI in Supply Chain Market Analysis and Outlook By Organization Size, 2024- 2034 (\$ billion)
- 8.5 North America AI in Supply Chain Market Analysis and Outlook By Application, 2024- 2034 (\$ billion)
- 8.6 North America AI in Supply Chain Market Analysis and Outlook By End-User, 2024- 2034 (\$ billion)
- 8.7 North America AI in Supply Chain Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)
  - 8.7.1 United States AI in Supply Chain Market Size, Share, Growth Trends and Forecast, 2024- 2034
  - 8.7.1 Canada AI in Supply Chain Market Size, Share, Growth Trends and Forecast,

2024- 2034

8.7.1 Mexico AI in Supply Chain Market Size, Share, Growth Trends and Forecast, 2024- 2034

## **9. SOUTH AND CENTRAL AMERICA AI IN SUPPLY CHAIN MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS**

9.1 Latin America AI in Supply Chain Market Data, 2025

9.2 Latin America AI in Supply Chain Market Future By Offering, 2024- 2034 (\$ billion)

9.3 Latin America AI in Supply Chain Market Future By Deployment, 2024- 2034 (\$ billion)

9.4 Latin America AI in Supply Chain Market Future By Organization Size, 2024- 2034 (\$ billion)

9.5 Latin America AI in Supply Chain Market Future By Application, 2024- 2034 (\$ billion)

9.6 Latin America AI in Supply Chain Market Future By End-User, 2024- 2034 (\$ billion)

9.7 Latin America AI in Supply Chain Market Future by Country, 2024- 2034 (\$ billion)

9.7.1 Brazil AI in Supply Chain Market Size, Share and Opportunities to 2034

9.7.2 Argentina AI in Supply Chain Market Size, Share and Opportunities to 2034

## **10. MIDDLE EAST AFRICA AI IN SUPPLY CHAIN MARKET OUTLOOK AND GROWTH PROSPECTS**

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa AI in Supply Chain Market Statistics By Offering, 2024- 2034 (USD billion)

10.3 Middle East Africa AI in Supply Chain Market Statistics By Deployment, 2024- 2034 (USD billion)

10.4 Middle East Africa AI in Supply Chain Market Statistics By Organization Size, 2024- 2034 (USD billion)

10.5 Middle East Africa AI in Supply Chain Market Statistics By Application, 2024- 2034 (USD billion)

10.6 Middle East Africa AI in Supply Chain Market Statistics By End-User, 2024- 2034 (USD billion)

10.7 Middle East Africa AI in Supply Chain Market Statistics by Country, 2024- 2034 (USD billion)

10.7.1 Middle East AI in Supply Chain Market Value, Trends, Growth Forecasts to 2034

10.7.2 Africa AI in Supply Chain Market Value, Trends, Growth Forecasts to 2034

## **11. AI IN SUPPLY CHAIN MARKET STRUCTURE AND COMPETITIVE LANDSCAPE**

- 11.1 Key Companies in AI in Supply Chain Industry
- 11.2 AI in Supply Chain Business Overview
- 11.3 AI in Supply Chain Product Portfolio Analysis
- 11.4 Financial Analysis
- 11.5 SWOT Analysis

## **12 APPENDIX**

- 12.1 Global AI in Supply Chain Market Volume (Tons)
- 12.1 Global AI in Supply Chain Trade and Price Analysis
- 12.2 AI in Supply Chain Parent Market and Other Relevant Analysis
- 12.3 Publisher Expertise
- 12.2 AI in Supply Chain Industry Report Sources and MethodologyOGAMV25R0029

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