

Manufacturing Execution Systems (MES) Market Forecasts to 2032 – Global Analysis By Component (Software and Services), Deployment Type, Enterprise Size, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Manufacturing Execution Systems (MES) Market is accounted for \$16.5 billion in 2025 and is expected to reach \$32.6 billion by 2032 growing at a CAGR of 10.2% during the forecast period. Manufacturing Execution Systems (MES) are integrated software solutions that monitor, control, and optimize production processes on the factory floor. MES bridges the gap between enterprise resource planning (ERP) systems and shop-floor operations, providing real-time visibility into manufacturing activities. It manages tasks such as scheduling, resource allocation, quality control, data collection, and performance analysis. By tracking materials, machines, and labor, MES ensures efficient workflow, reduces downtime, and enhances product quality. These systems support compliance with industry standards and enable agile manufacturing. MES plays a critical role in digital transformation, helping manufacturers improve productivity, traceability, and decision-making across production environments.

Market Dynamics:

Driver:

Demand for real-time production visibility

The Manufacturing Execution Systems (MES) Market is driven by the increasing demand for real-time visibility into production operations. MES enables manufacturers to monitor and control shop-floor activities with precision, improving responsiveness and

decision-making. Real-time data collection enhances traceability, quality assurance, and resource utilization. As industries embrace digital transformation, the ability to access accurate, live production metrics becomes essential for maintaining competitiveness, reducing downtime, and ensuring agile manufacturing across diverse sectors.

Restraint:

High implementation costs

A key restraint in the MES Market is the high cost of implementation. Deploying MES involves significant investment in software, hardware, integration with existing systems, and workforce training. These expenses can be prohibitive for small and medium enterprises, delaying adoption. Additionally, customization and scalability requirements further increase costs. Despite long-term benefits, the initial financial burden remains a challenge, especially in cost-sensitive industries or regions with limited access to capital and digital infrastructure.

Opportunity:

Operational efficiency and cost reduction

Operational efficiency and cost reduction present major opportunities for the MES Market. MES streamlines production workflows, minimizes waste, and optimizes resource allocation. By automating data capture and enabling predictive maintenance, MES reduces downtime and enhances throughput. These improvements translate into lower operational costs and higher profitability. As manufacturers seek to improve margins and meet rising demand, MES offers a scalable solution for achieving lean production and continuous improvement across complex manufacturing environments.

Threat:

Complexity of integration

The complexity of integrating MES with existing enterprise systems poses a significant threat to market growth. MES must seamlessly connect with ERP, SCADA, and other legacy platforms, which can be technically challenging and time-consuming. Integration issues may lead to data silos, operational disruptions, and increased implementation costs. Without proper planning and expertise, manufacturers risk reduced system

performance and delayed ROI. Addressing interoperability and standardization is critical to overcoming this barrier and ensuring successful MES deployment.

Covid-19 Impact:

The COVID-19 pandemic accelerated the adoption of MES as manufacturers sought resilient, remote-capable solutions to manage disruptions. MES enabled real-time monitoring, remote access, and adaptive scheduling during lockdowns and supply chain volatility. While initial investments slowed, the crisis highlighted the importance of digital infrastructure in maintaining operational continuity. Post-pandemic recovery has reinforced MES as a strategic asset for agile manufacturing, driving renewed interest in automation, data-driven decision-making, and scalable production systems across industries.

The software segment is expected to be the largest during the forecast period

The software segment is expected to account for the largest market share during the forecast period, due to growing demand for customizable, scalable, and cloud-based MES solutions. Software platforms offer real-time analytics, integration capabilities, and user-friendly interfaces that enhance production control and visibility. As industries prioritize digital transformation, software-driven MES solutions are increasingly preferred for their flexibility, cost-effectiveness, and ability to support complex manufacturing environments across various sectors.

The food & beverages segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the food & beverages segment is predicted to witness the highest growth rate, due to stringent regulatory requirements, demand for product traceability, and the need for consistent quality control. MES helps food manufacturers monitor batch production, manage inventory, and ensure compliance with safety standards. As consumer expectations rise and supply chains become more complex, the sector is investing in MES to enhance efficiency, transparency, and responsiveness in production operations.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, due to rapid industrialization, expanding manufacturing hubs, and government

initiatives supporting smart factories. Countries like China, India, and South Korea are investing heavily in automation and digital infrastructure. The region's diverse industrial base and rising demand for operational efficiency position Asia Pacific as a leading adopter of MES solutions, contributing significantly to global market expansion.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to region's advanced technological landscape, strong regulatory framework, and emphasis on digital transformation driving MES adoption. U.S. and Canadian manufacturers are leveraging MES to enhance productivity, ensure compliance, and integrate with Industry 4.0 technologies. Investments in smart manufacturing, coupled with a focus on sustainability and innovation, position North America as a key growth engine for MES solutions.

Key players in the market

Some of the key players in Manufacturing Execution Systems (MES) Market include Siemens AG, Applied Materials Inc., Rockwell Automation Inc., Plex Systems Inc., SAP SE, AVEVA Group plc, ABB Ltd., Yokogawa Electric Corporation, Honeywell International Inc., Mitsubishi Electric Corporation, Dassault Systèmes SE, Oracle Corporation, Schneider Electric SE, GE Digital, and Emerson Electric Co.

Key Developments:

In September 2025, Applied Materials and GlobalFoundries have entered into a strategic collaboration to build a waveguide fabrication facility in Singapore, accelerating AI-powered photonics. This effort aims to produce high-performance optical components for AR, leveraging Applied's materials expertise and GF's manufacturing scale.

In April 2025, Applied Materials has acquired a 9 % stake in BE Semiconductor Industries (Besi) to deepen their long-standing joint work on hybrid bonding technology. Their collaboration aims to create fully integrated die-to-wafer bonding systems, driving more efficient, compact semiconductor packaging.

Components Covered:

Software

Services

Deployment Types Covered:

On-Premise

Cloud

Enterprise Sizes Covered:

Small & Medium Enterprises (SMEs)

Large Enterprises

End Users Covered:

Automotive

Oil & Gas

Food & Beverages

Paper & Packaging

Chemicals & Pharmaceuticals

Metals & Mining

Electronics & Semiconductors

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 End User Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL MANUFACTURING EXECUTION SYSTEMS (MES) MARKET, BY

COMPONENT

- 5.1 Introduction
- 5.2 Software
 - 5.2.1 Production Scheduling
 - 5.2.2 Maintenance Management
 - 5.2.3 Quality Management
 - 5.2.4 Performance Analysis
 - 5.2.5 Inventory Management
- 5.3 Services
 - 5.3.1 Consulting
 - 5.3.2 Support & Maintenance
 - 5.3.3 Implementation & Integration

6 GLOBAL MANUFACTURING EXECUTION SYSTEMS (MES) MARKET, BY DEPLOYMENT TYPE

- 6.1 Introduction
- 6.2 On-Premise
- 6.3 Cloud

7 GLOBAL MANUFACTURING EXECUTION SYSTEMS (MES) MARKET, BY ENTERPRISE SIZE

- 7.1 Introduction
- 7.2 Small & Medium Enterprises (SMEs)
- 7.3 Large Enterprises

8 GLOBAL MANUFACTURING EXECUTION SYSTEMS (MES) MARKET, BY END USER

- 8.1 Introduction
- 8.2 Automotive
- 8.3 Oil & Gas
- 8.4 Food & Beverages
- 8.5 Paper & Packaging
- 8.6 Chemicals & Pharmaceuticals
- 8.7 Metals & Mining
- 8.8 Electronics & Semiconductors

8.9 Other End Users

9 GLOBAL MANUFACTURING EXECUTION SYSTEMS (MES) MARKET, BY GEOGRAPHY

9.1 Introduction

9.2 North America

9.2.1 US

9.2.2 Canada

9.2.3 Mexico

9.3 Europe

9.3.1 Germany

9.3.2 UK

9.3.3 Italy

9.3.4 France

9.3.5 Spain

9.3.6 Rest of Europe

9.4 Asia Pacific

9.4.1 Japan

9.4.2 China

9.4.3 India

9.4.4 Australia

9.4.5 New Zealand

9.4.6 South Korea

9.4.7 Rest of Asia Pacific

9.5 South America

9.5.1 Argentina

9.5.2 Brazil

9.5.3 Chile

9.5.4 Rest of South America

9.6 Middle East & Africa

9.6.1 Saudi Arabia

9.6.2 UAE

9.6.3 Qatar

9.6.4 South Africa

9.6.5 Rest of Middle East & Africa

10 KEY DEVELOPMENTS

- 10.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 10.2 Acquisitions & Mergers
- 10.3 New Product Launch
- 10.4 Expansions
- 10.5 Other Key Strategies

11 COMPANY PROFILING

- 11.1 Siemens AG
- 11.2 Applied Materials Inc.
- 11.3 Rockwell Automation Inc.
- 11.4 Plex Systems Inc.
- 11.5 SAP SE
- 11.6 AVEVA Group plc
- 11.7 ABB Ltd.
- 11.8 Yokogawa Electric Corporation
- 11.9 Honeywell International Inc.
- 11.10 Mitsubishi Electric Corporation
- 11.11 Dassault Systèmes SE
- 11.12 Oracle Corporation
- 11.13 Schneider Electric SE
- 11.14 GE Digital
- 11.15 Emerson Electric Co.

List Of Tables

LIST OF TABLES

Table 1 Global Manufacturing Execution Systems (MES) Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Manufacturing Execution Systems (MES) Market Outlook, By Component (2024-2032) (\$MN)

Table 3 Global Manufacturing Execution Systems (MES) Market Outlook, By Software (2024-2032) (\$MN)

Table 4 Global Manufacturing Execution Systems (MES) Market Outlook, By Production Scheduling (2024-2032) (\$MN)

Table 5 Global Manufacturing Execution Systems (MES) Market Outlook, By Maintenance Management (2024-2032) (\$MN)

Table 6 Global Manufacturing Execution Systems (MES) Market Outlook, By Quality Management (2024-2032) (\$MN)

Table 7 Global Manufacturing Execution Systems (MES) Market Outlook, By Performance Analysis (2024-2032) (\$MN)

Table 8 Global Manufacturing Execution Systems (MES) Market Outlook, By Inventory Management (2024-2032) (\$MN)

Table 9 Global Manufacturing Execution Systems (MES) Market Outlook, By Services (2024-2032) (\$MN)

Table 10 Global Manufacturing Execution Systems (MES) Market Outlook, By Consulting (2024-2032) (\$MN)

Table 11 Global Manufacturing Execution Systems (MES) Market Outlook, By Support & Maintenance (2024-2032) (\$MN)

Table 12 Global Manufacturing Execution Systems (MES) Market Outlook, By Implementation & Integration (2024-2032) (\$MN)

Table 13 Global Manufacturing Execution Systems (MES) Market Outlook, By Deployment Type (2024-2032) (\$MN)

Table 14 Global Manufacturing Execution Systems (MES) Market Outlook, By On-Premise (2024-2032) (\$MN)

Table 15 Global Manufacturing Execution Systems (MES) Market Outlook, By Cloud (2024-2032) (\$MN)

Table 16 Global Manufacturing Execution Systems (MES) Market Outlook, By Enterprise Size (2024-2032) (\$MN)

Table 17 Global Manufacturing Execution Systems (MES) Market Outlook, By Small & Medium Enterprises (SMEs) (2024-2032) (\$MN)

Table 18 Global Manufacturing Execution Systems (MES) Market Outlook, By Large

Enterprises (2024-2032) (\$MN)

Table 19 Global Manufacturing Execution Systems (MES) Market Outlook, By End User (2024-2032) (\$MN)

Table 20 Global Manufacturing Execution Systems (MES) Market Outlook, By Automotive (2024-2032) (\$MN)

Table 21 Global Manufacturing Execution Systems (MES) Market Outlook, By Oil & Gas (2024-2032) (\$MN)

Table 22 Global Manufacturing Execution Systems (MES) Market Outlook, By Food & Beverages (2024-2032) (\$MN)

Table 23 Global Manufacturing Execution Systems (MES) Market Outlook, By Paper & Packaging (2024-2032) (\$MN)

Table 24 Global Manufacturing Execution Systems (MES) Market Outlook, By Chemicals & Pharmaceuticals (2024-2032) (\$MN)

Table 25 Global Manufacturing Execution Systems (MES) Market Outlook, By Metals & Mining (2024-2032) (\$MN)

Table 26 Global Manufacturing Execution Systems (MES) Market Outlook, By Electronics & Semiconductors (2024-2032) (\$MN)

Table 27 Global Manufacturing Execution Systems (MES) Market Outlook, By Other End Users (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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