



MRS30-296 · Smart Manufacturing Technologies

Manufacturing Execution Systems (MES)

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Manufacturing execution systems (MES) are the digital thread between the ERP boardroom and the shop floor — spanning discrete MES, process MES, cloud / SaaS MES and MES-MOM suites that schedule, track, document and optimise production in real time. This decision-grade study sizes the global market three ways — value, deployments and managed plants — across deployment type, delivery model and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. MES makes material, energy and quality performance visible and optimisable plant-wide, underpinning waste reduction and responsible production.

Mapped Sustainable Development Goals:

SDG 9 Industry & Innovation	SDG 12 Responsible Consumption	SDG 8 Decent Work & Growth	SDG 7 Affordable & Clean Energy	SDG 13 Climate Action
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Measurable sustainability outcomes assessed:

- Plant-wide material and energy visibility
- Waste reduction and responsible production
- Quality, traceability and OEE improvement
- Data security, cloud-energy footprint and vendor lock-in as material considerations

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped



MARKET OVERVIEW

From disconnected systems to the digital thread — where real-time ERP-to-shop-floor connectivity drives the value.

The manufacturing execution systems (MES) market is read three ways — value, volume and managed plants — and forecast under four scenarios, each region reported separately. Demand is propelled by the drivers below, supported by maturing incentives across Europe, North America and Asia Pacific.

- Asia Pacific is profiled first — China, Japan, India, South Korea — plant digitisation, SI capacity
- Europe automation leader — Germany, France, Portugal — Siemens Opcenter, Dassault DELMIA, Critical Manufacturing
- Segmentation reads the value across the report’s structure, technology and application axes
- Resource-and-outcome economics is the differentiator — increasingly with service and data revenue

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Asia Pacific	Scale engine	China, Japan, India, South Korea — plant digitisation, SI capacity
Europe	Automation leader	Germany, France, Portugal — Siemens Opcenter, Dassault DELMIA, Critical Manufacturing
North America	Platform leader	United States, Canada — Rockwell, GE Vernova Proficy, Plex, Tulip
Latin America	Emerging	Brazil, Mexico — automotive & electronics MES uptake
Africa	Frontier	South Africa, Egypt — manufacturing-digitisation programmes
Middle East	Frontier	Saudi Arabia, UAE — pharma & industrial-diversification MES

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Digital-thread & Industry 4.0 initiatives • Compliance, traceability & quality mandates • Cloud / SaaS MES adoption • Real-time visibility & OEE goals • Skilled-labour scarcity & standardisation 	<ul style="list-style-type: none"> • Implementation complexity & long cycles • Integration with legacy ERP & OT • Customisation cost & change management • Data-security & cloud-migration concerns • Vendor lock-in & switching cost



SEGMENTATION SNAPSHOT

By Deployment Type	Discrete MES · process MES · hybrid MES
By Delivery Model	On-premise · cloud · SaaS
By Component	MES software · MOM modules · integration · services
By Application	Automotive · electronics · pharma / life sciences
By End User	Manufacturers · system integrators · plant managers · quality teams
By Ownership	Perpetual licence · subscription · managed service

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

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- › Chapter 2. Industry Discovery Summary — Manufacturing Execution Systems (MES)
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
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- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

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- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
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- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape



Part V — Company, Competition, Patent and Project Intelligence

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- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
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Part IX — Annexes, Directories and Reference Material

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- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established MES and industrial-software majors, MOM specialists, and cloud/SaaS vendors. Deal activity — partnerships, technology licensing and demonstration programmes — signals a market consolidating around bankable, repeatable solutions.

Representative players profiled in the full report:

Siemens AG (Opcenter) · Rockwell Automation, Inc. · Dassault Systèmes SE (DELMIA) · SAP SE · ABB Ltd · and 20+ further profiled players across hardware, software and integration.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.



KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global manufacturing execution systems (MES) market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do resource-and-outcome economics change returns versus conventional methods?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read three ways so value, volume and area views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear investment verdict.

WHO SHOULD BUY THIS REPORT

Investors, manufacturers, system integrators, OEMs, plant operators, policymakers, lenders, research institutions, strategic corporate planners, decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.