

Operations Management Worldwide Outlook

FIVE YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2012

MANUFACTURERS INVESTING HEAVILY IN PLANT FLOOR SOFTWARE

Worldwide demand for Operations Management (OM) software and services has been relatively strong for the past several years, and continues to gain momentum, with manufacturers spending at a rate of over \$8 billion per year. Suppliers are competing by building or acquiring solutions that satisfy a broad set of needs across all manufacturing operations.

This is the first market study that focuses on the whole segment, rather than individual applications. By doing so, a comprehensive picture emerges, and new insights about supplier strategies, strengths, and weaknesses may be obtained by examining the makeup of the leaders in various market segments.

Operations Management is the management of the people, business processes,

technology, and capital assets involved in procuring and receiving raw materials; implementing product designs, specifications, formulations, or recipes by manufacturing products; distributing these products; and supporting them through their end-of-life. The extreme competitive pressures of a "flattening world" are driving manufacturers to improve cost control, customer responsiveness, and real-time visibility.

To address this, manufacturers need to consider their infrastructure, connectivity throughout operations and to business, design, and supply chain systems, and functionality from legacy and new applications or services. The suppliers featured here are significant players in providing at least one dimension of these requirements.

STRATEGIC ISSUES

The Operations Management market is served by enterprise suppliers, infrastructure suppliers, automation suppliers, PLM suppliers, and independent software companies. In this study, you will find:

- How increased global competition will affect this market
- Whether different industries are coalescing around different suppliers
- Whether one player is dominant, or is on a path to dominance
- Which regions and industries are growing the fastest
- What effect strategic partnerships have on value

For more information, please visit us at www.arcweb.com/res/study.

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Market Size and Forecast

SCOPE

MARKET SHARES LIST OF FIGURES

Market Shares of the Leading Suppliers
Market Shares by Software and Service Revenues
Market Shares by Region
North America
Europe, Middle East, Africa
Asia
Latin America

Market Shares by Customer Size

Market Shares by Industry

Automotive
Aerospace & Defense
Cement & Glass
Chemical
Electric Power
Electrical & Appliance
Electronics & Semiconductor
Fabricated Metals
Food & Beverage
Furniture & Wood Products
Machinery
Medical Products
Mining & Metals

Oil & Gas
Petrochemical
Pharmaceutical & Biotech
Plastics & Rubber
Printing & Publishing
Pulp & Paper
Refining
Textiles
Water & Wastewater

MARKET FORECAST LIST OF FIGURES

Total Operations Management Business
Shipments by Region

Shipments by Software and Service Revenues
Shipments by Industry
Shipments by Customer Size

SUPPLIER PROFILES

Profiles for over 90 of the major suppliers servicing this market are included. Each profile reviews the company's business, products, and services as it applies to this market segment.

**Total Shipments of Operations Management Systems
(Millions of Dollars)**

