E-COMMERCE FULFILLMENT DEMANDS REIGN SUPREME

A warehouse management system’s (WMS) primary mission is to manage a warehouse’s resources, including space, labor, equipment, tasks, and material flows. A WMS is a real-time solution (not paper-based pick lists) and includes a variety of complementary solutions within the scope of this report: labor management, voice recognition, warehouse analytics, and warehouse optimization solutions.

ARC has been conducting this research and publishing the WMS report for 20 years. This history provides valuable insights into market dynamics and refines the research process.

E-commerce fulfillment requirements continue to be the leading factor contributing to growth in demand for WMS solutions. However, there is a notable shift in market pressures and the profile of companies purchasing WMS to support their needs. More specifically, expedited delivery of e-commerce orders is a recent competitive phenomenon that is placing pressures on retailers. This is creating additional urgency around order release and fulfillment response times while also enabling operations to assure order accuracy and efficiency. Also, fulfillment needs for hard line items, such as grocery, have experienced notable acceleration. Finally, e-commerce fulfillment requirements are also increasing demand for automation integration capabilities.

For more information visit us at www.arcweb.com/market-studies/.

### Strategic Analysis
- Major Trends
- Regional Trends
- Industry Trends
- Strategic Recommendations

### Competitive Analysis
- Market Shares of the Leading Suppliers
- Market Shares by Region
  - North America
  - Europe, Middle East, Africa
  - Asia
  - Latin America
- Market Shares by Revenue Category
  - Software License
  - SaaS/Hosting
  - Implementation Services
  - Maintenance Services
- Market Shares by Size of Customer
  - Tier 1
  - Tier 2
  - Tier 3
- Market Shares by Application Type
  - Core WMS
  - Warehouse Analytics
  - Labor Management
  - Speech
  - Optimization
  - Other
- Market Shares by Industry
  - 3PL/Logistics
  - Aerospace & Defense
  - Automotive
  - Chemical
  - Electronics & Electrical
  - Food & Beverage
  - Government
  - Household & Personal Care (CPG)
  - Machinery
  - Pharmaceutical
  - Printing & Publishing
  - Retail

### Research Formats
- This research is available as a Market Intelligence Workbook (Excel) and/or a concise, executive-level Market Analysis Report (PDF), with or without detailed charts.

### Strategic Issues
- How is the transition to SaaS expected to impact market revenue growth?
- What market segments are expected to experience the greatest growth and what is driving the growth?
- What suppliers are best positioned to capture segment growth?
- What are the expected growth rates for the market segments over the next five years?

### Research Focus Areas

#### Market Forecasts
- Total Shipments of WMS
- Shipments by Region
- Shipments by Revenue Category
- Shipments by Size of Customer
- Shipments by Application Type
- Shipments by Industry
- Shipments of Retail by Vertical

#### Industry Participants
- The research identifies all relevant suppliers serving this market.

**Worldwide Warehouse Management Systems Market**

<table>
<thead>
<tr>
<th>Year</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>