

Global Next-Generation Manufacturing Software Market: Key Research Findings 2015

◆ Research Outline

Yano Research Institute has conducted a study on the global market of next-generation manufacturing software with the following conditions:

1. Research period: From December 2014 to June 2015
2. Research targets: Leading vendors providing software for the manufacturing industry
3. Research methodologies: Face-to-face interviews with expert researchers, surveys via telephone/email, and literature search

<What is the Next-Generation Manufacturing Software?>

This research considers IoT-utilized software for the manufacturing industry as the next-generation manufacturing software and calculated the global market size. The global next-generation manufacturing software market size is defined as the market size of those systems that the industry have conventionally used for facilitating manufacturing, added with IoT (Internet of Things) platform. Those conventionally-used systems in the manufacturing industry include PLM (Product Lifecycle Management), MOM/MES (Manufacturing Operations Management/Manufacturing Execution System), and SLM (Service Lifecycle Management).

◆ Key Findings

■ Global Next-Generation Manufacturing Software Market in 2014 Reaches US\$18,180 Million

Utilization of IoT (Internet of Things) in the manufacturing industry has led to the recent new movements, including Industry 4.0 and Industrial Internet. These new movements largely influence software industry, which this research positioned as the next-generation manufacturing software. The global next-generation manufacturing software market in 2014 is projected to attain US\$18180 million.

■ “Digital Twin” Became New Keyword

In the coming years, the idea of “Digital Twin”, indicating virtual reproduction of existing factories and products, is likely to be essential. In the next-generation manufacturing, IoT technologies allow acquiring, collecting and storing of data of the existing factories and products, connect them with Digital Twin, by which the accuracy of the simulations conducted in computers is to be improved.

■ Increasing Importance of Data Linkage

There is no doubt that utilization of IoT platforms steadily increases data volume sent from factories and products. Enterprises should lose no time in constructing a corporate information system that enables overall optimization. Whereas many of the information systems at production sites are separated and disconnected with each other, data linkage between the systems of practical production and engineering is likely to become more important in the future.

◆ Report format

Published report: “IoT (Internet of Things) Era – IT Solutions for Manufacturing 2015”

Issued on: June 30, 2015

Language: Japanese

Format: 163 pages in A4 format

Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

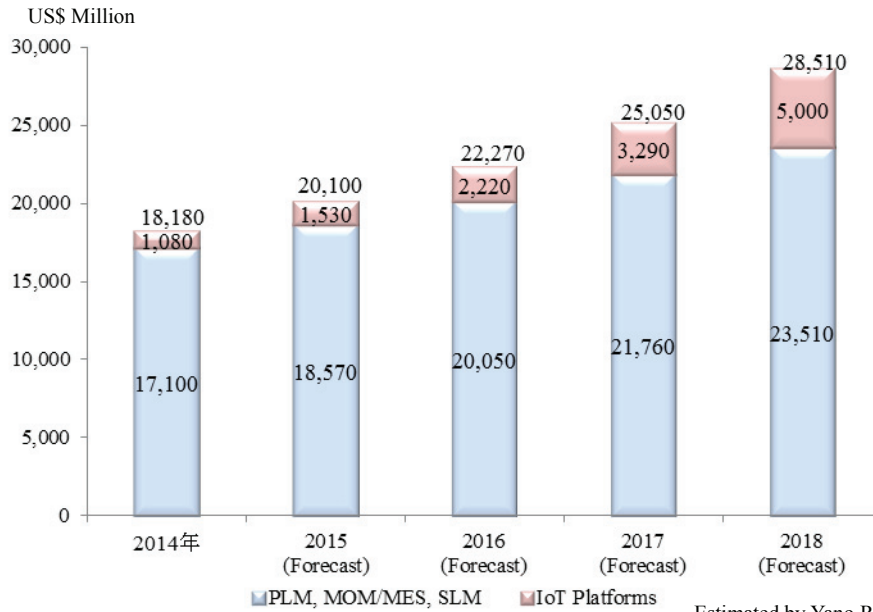
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■ **Table 1 & Figure 1: Transition and Forecast of Global Next-Generation Manufacturing Software Market Size**



Estimated by Yano Research Institute

(US\$ Million)

	2014年	2015 (Forecast)	2016 (Forecast)	2017 (Forecast)	2018 (Forecast)
PLM, MOM/MES, SLM	17,100	18,570	20,050	21,760	23,510
CAGR	-	8.6%	8.3%	8.4%	8.3%
IoT Platforms	1,080	1,530	2,220	3,290	5,000
CAGR	-	41.7%	43.4%	45.0%	46.7%
Global Next-Generation Manufacturing Software M	18,180	20,100	22,270	25,050	28,510
CAGR	-	10.6%	10.7%	11.3%	11.9%

Notes:

1. The market size is based on the shipment value of manufacturers.
2. The turnover of hardware is not included, but the services and maintenance for support are included.
3. CAGR is an annual average growth rate from 2014 to the year concerned.

■ **Table 2: Definition of Next-Generation Manufacturing Software**

Category	Definition
PLM	PLM is an abbreviation for Product Lifecycle Management. This report includes CAD/CAM/CAE, PDM (Product Data Management), digital factory, viewer/DMU (digital mock up).
MOM/MES	MOM is an abbreviation of Manufacturing Operations Management. MES stands for Manufacturing Execution System.
SLM	SLM is an abbreviation of Service Lifecycle Management. It indicates software to support maintenance services.
IoT Platforms	A platform to process IoT for the manufacturing industry. It includes tools that analyze or utilize the platform or data collecting and storing of sensor data.

Estimated by Yano Research Institute