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Enterprise Software: market data & analysis

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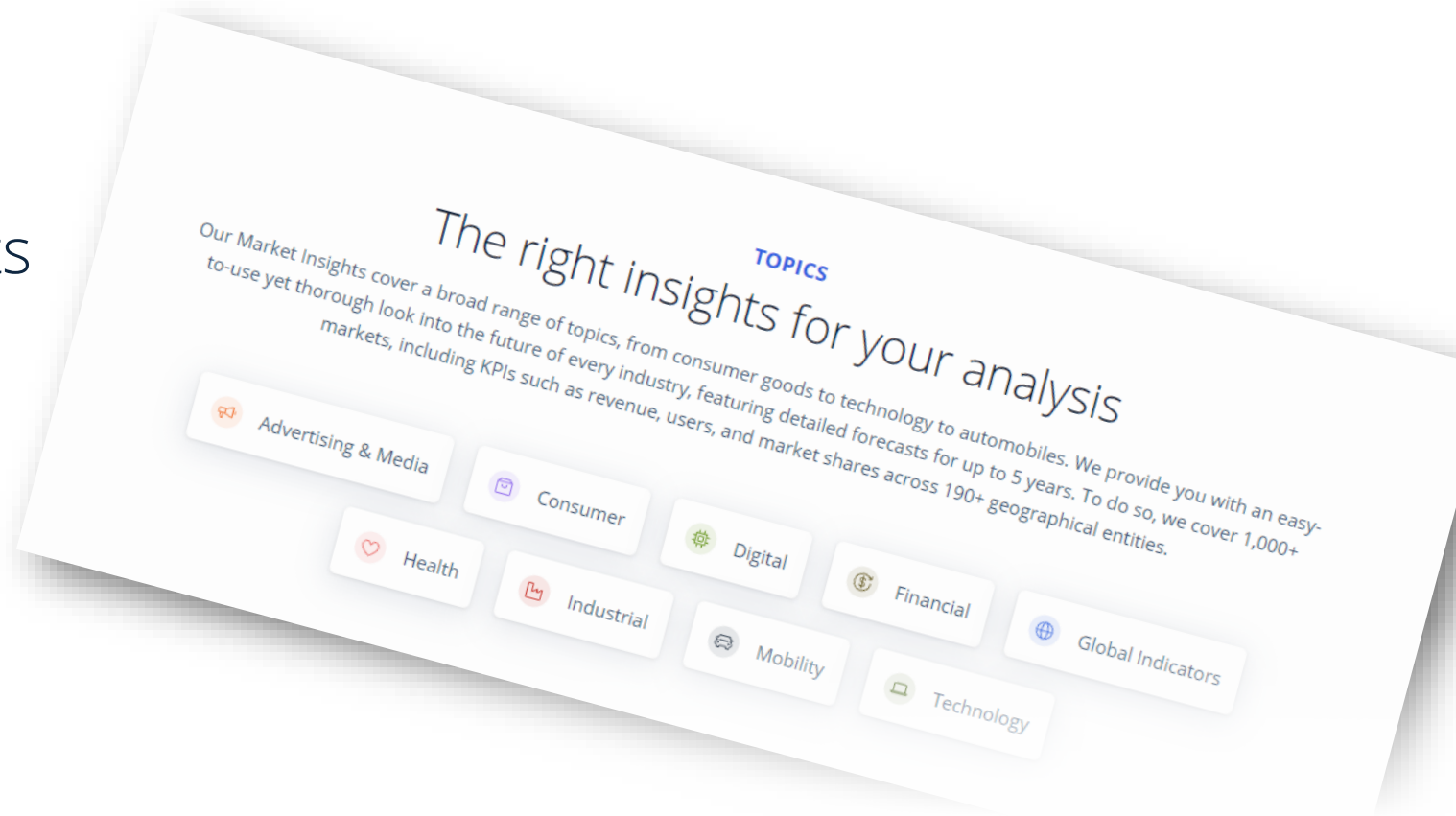
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The Enterprise Software market is part of the Software market.



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CHAPTER 1

Overview



The Enterprise Software market is a fast growing market

Overview: Summary

Summary

Enterprise software is of great importance in digital business environments because they help companies to stand out from the competition. In terms of revenue share, the Enterprise Software segment is the largest segment of the Software market and has been steadily growing in the past few years.

The main driver behind this continuous growth is the fact that enterprise software applications play a crucial role in the operation of a company's business in an efficient and cost-effective manner. Even in times of economic crises, the Enterprise Software segment remains stable. This can be attributed to the fact that the use of enterprise software applications has become indispensable, with companies suffering huge losses without the right software tools to carry out their business.

Cloud-based software product offers and subscription pricing models by software providers have also contributed to the segment's stability as they have allowed for flexibility and scalability for small and medium-scale companies. This segment is projected to have a growth rate of more than 5% for the next five years as more companies offer cloud-based software solutions.

Sources: Market Insights 2023

Enterprise Software is an important part of the Software market

Overview: Market Definition (1/2)

Definition:

The Enterprise Software market covers software applications designed to support essential business activities by large organizations such as enterprise resource planning, customer relationship management, business intelligence, and supply chain management.

Products in the Enterprise Software market can be obtained in two ways: as on-premises software that is sold via a transactional license or a subscription and as cloud-based software (software as a service/SaaS) that is most frequently sold as a subscription.

Structure:

The Enterprise Software market contains eight markets that are based on the functionality of the software:

Business Intelligence Software refers to software applications that support organizations to analyze, visualize, and report data.

Content Management Software refers to a wide range of software applications that support organizations to manage their digital content such as documents, images, and videos.

Customer Relationship Management Software refers to software applications that support organizations to manage their interactions with customers, clients, and prospects.

eCommerce Software refers to a wide range of software applications that support organizations to manage their online sales channels.

Enterprise Performance Management Software refers to software solutions that help organizations to manage and improve their performance across various areas, such as finance, operations, and strategy.

Enterprise Resource Planning Software refers to software applications that support organizations to manage, integrate and optimize important business activities related to resources such as people, finance, capital, materials, and orders.

Sources: Market Insights 2023

Enterprise Software is an important part of the Software market

Overview: Market Definition (2/2)

Supply Chain Management Software refers to software applications that support organizations to manage their supply chain activities such as inventory optimization, supplier and vendor management, and logistic operations.

Other Enterprise Software refers to aggregated revenues for the types of enterprise software that are not specifically mentioned in the other Enterprise Software markets, such as Project Management Software, Product Life Cycle Management Software, and Production and Operation Software.

Additional Information:

The Enterprise Software market comprises revenue and revenue growth as the key performance indicators. Only revenues that are generated by primary vendors at the manufacturer price level either directly or through distribution channels (excluding value-added tax) are included, and revenues generated by resellers are excluded. Revenues are generated through both online and offline sales channels and include spending by consumers (B2C), enterprises (B2B) as well as governments (B2G). Detailed definitions of each market can be found on the respective page where the market data is displayed.

Key players in this market include SAP, Salesforce, Adobe, and Oracle.

Sources: Market Insights 2023

Enterprise Software accounted for 40.56% of the Software market revenue in 2022

Overview: Key Takeaways and in scope / out of scope

Key Takeaways

Revenue in the Enterprise Software market is projected to reach US$271.80bn in 2023.

Customer Relationship Management Software dominates the market with a projected market volume of US$79.40bn in 2023.

Revenue is expected to show an annual growth rate (CAGR 2023-2028) of 6.73%, resulting in a market volume of US$376.40bn by 2028.

The average Spend per Employee in the Enterprise Software market is projected to reach US$78.07 in 2023.

In global comparison, most revenue will be generated in the United States (US$139.20bn in 2023).

In scope

This market includes:

- Enterprise Resource Planning (ERP)
- Customer Relationship Management (CRM)
- Business Intelligence (BI)
- Supply Chain Management (SCM)

Out of scope

This market excludes:

- Administrative Software
- Office Software
- Collaboration Software

Sources: Market Insights 2023

CHAPTER 2

Market Numbers



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