

GLOBAL MARKET OVERVIEW & MARKET DEVELOPMENT

SUPPLY CHAIN RESILIENCE & TRACEABILITY

- Software/data platforms
- Hardware, IoT and sensors
- Time horizon 2026–2035

As of July 2026



Resilience and traceability are becoming operational market requirements

Why DTO analyzes the market—and how the findings were generated.

Global supply chains face growing regulatory, geopolitical and operational pressure. At the same time, companies are increasingly expected to provide reliable evidence of material flows, risks and origin information across multiple supplier tiers. The combination of resilience and traceability is therefore evolving from a stand-alone project into a strategic management priority. DTO – B2B Research & Strategies has systematically analyzed the market to provide transparency on its structure, dynamics and relevant fields of action.

OBJECTIVES OF THE MARKET ANALYSIS

- Create transparency on market structure, the vendor landscape and value creation logic.
- Assess market potential through 2035 and classify demand, technology and regulatory drivers.
- Evaluate target segments and regions and derive strategic courses of action.



METHODOLOGY

ANALYSIS PERIOD

June–July 2026

DATA BASIS & EXPERTISE

METHOD MIX

SECONDARY DATA

Industry association information, company databases and existing studies

DTO CONTENT

Existing analyses and internal research modules

EXPERT INTERVIEWS

Executives from manufacturing, logistics, digitalization and risk management

Source triangulation to validate market structure, drivers and courses of action.

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Definition, structure, value creation logic, standards

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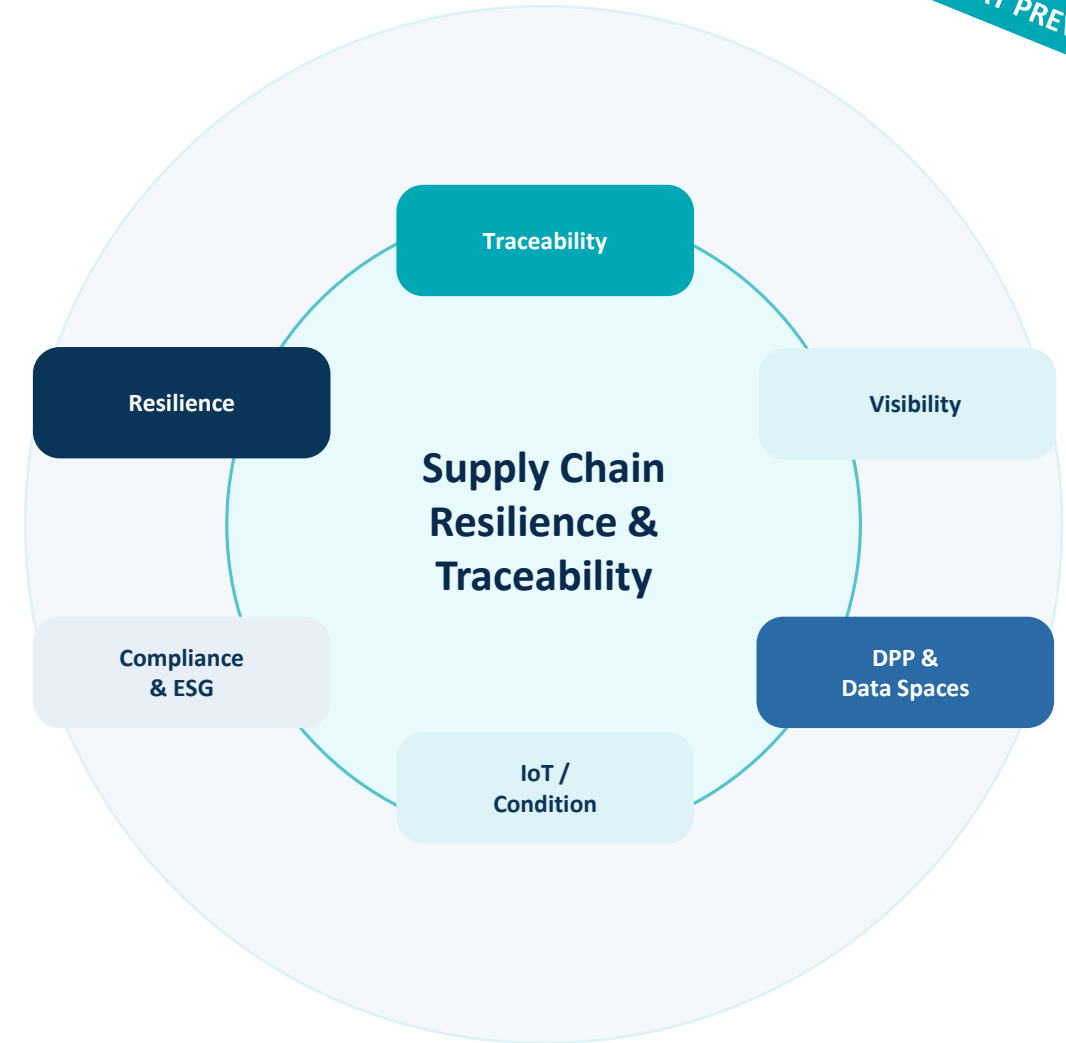
Definition and market scope

The core market emerges where data becomes verifiable, integrable and actionable.

Supply chain resilience refers to a supply chain's ability to anticipate, absorb, respond to and adapt to disruptions. Traceability is more evidence- and audit-oriented than visibility alone and links products, batches, components, raw materials, events and origin information.

CORE MARKET

- Traceability, risk and compliance platforms
- DPP/product passport and data space solutions
- IoT, sensors, Auto-ID, RFID, barcodes and edge devices
- Implementation and integration services directly related to the use case



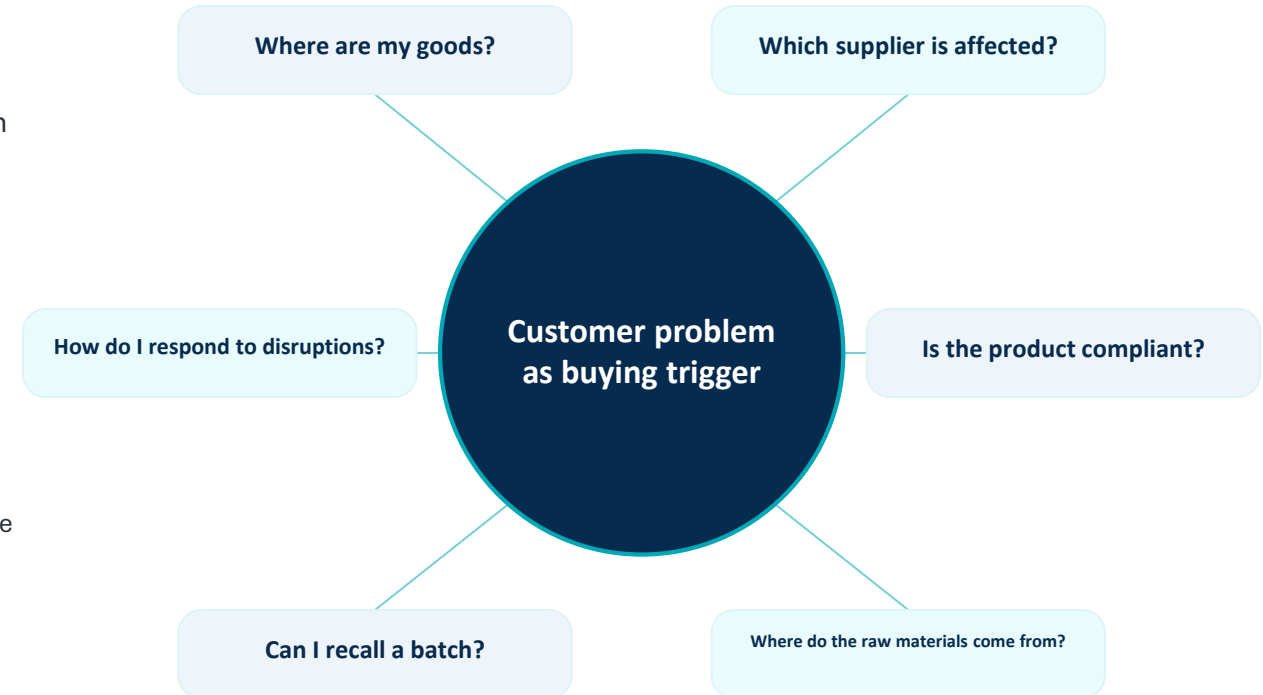
The market boundary is defined not by a product category, but by the ability to make physical supply chains verifiable and controllable through data.

Market structure: Fragmented, but solution-driven

The overlap of supply chain visibility, compliance, risk monitoring, DPP, IoT and integration services creates a fragmented competitive landscape. At the same time, the market is attractive because several budget pools are activated at once: operations, quality, compliance, sustainability, IT and procurement.

KEY PATTERNS

- Use cases are vertical-specific: Batteries, pharmaceuticals, food, textiles and automotive require different data models.
- Access to data in tier-n supply chains is the bottleneck—not visualization.
- Integration with ERP, PLM, MES, WMS, TMS and quality processes determines project cost and time to value.



Fragmentation is not only a risk: It creates niches for specialists with a clear vertical use case and credible data sovereignty.

CONTACT & FURTHER INFORMATION

Would you like to explore the topic in greater depth, need additional information or have questions about other subjects? Please contact us—we will be happy to assist you.



HEADQUARTER **DÜSSELDORF**

DTO Consulting GmbH

Benrather Schloßallee 33
40597 Düsseldorf
Germany

☎ +49 (0)211 17966 00

✉ info@dto-research.de



DTO AMERICA **CHARLOTTE, NC**

DTO B2B Research & Strategies Inc.

101 S Tryon St. STE 2700
Charlotte, North Carolina 28280
USA

☎ +1 (704) 791 1455

✉ info@dto-research.com



DTO FRANCE **PARIS**

DTO B2B Research & Strategies

10 Avenue Kleber
75116 Paris
France

☎ +33 1 56 03 65 45

✉ info@dto-research.fr