

We believe in
the power of
transparency

THE

and collaboration.
For better decisions.
For everyone.

MARKET.

PIM REPORT 2023 | 04/23

© TGOA | THE GROUP OF ANALYSTS
WWW.TGOA.COM



IMPRINT

ANALYST HOUSE

1 The Group of Analysts

Uferpromenade 5
88709 Meersburg
analysts@tgoa.com
CEO Temel Kahyaoglu
temel@tgoa.com

PUBLISHING HOUSE

2 The Group of Authors

Uferpromenade 5
88709 Meersburg
authors@tgoa.com
CEO Carmela Ana Melone
mela@tgoa.com

ADVISORY HOUSE

3 The Group of Advisors

Uferpromenade 5
88709 Meersburg
advisors@tgoa.com
CEO Temel Kahyaoglu
temel@tgoa.com

RESEARCH HOUSE

4 The Group of Anticipators

Uferpromenade 5
88709 Meersburg
anticipators@tgoa.com
CEO Temel Kahyaoglu
temel@tgoa.com

LICENSE MANAGEMENT & LEGAL

5 The Grand Orchestra Audience

Uferpromenade 5
88709 Meersburg
audience@tgoa.com
CEO Temel Kahyaoglu
temel@tgoa.com

FURTHER ADVISORY HOUSES

6 The Group of Advisors 01

Sollbrüggenstr. 52
47800 Krefeld
CEO Matthias Kant
matthias@tgoa.com

7 The Group of Advisors 02

Silberburgstraße 126
70176 Stuttgart
CEO Tom Hörl
tom@tgoa.com

8 The Group of Advisors 03

Karl-von-Drais-Straße 9
78239 Rielasingen-Worblingen
CEO Stephan Friese
stephan@tgoa.com
CEO Kian Soltanmoradi
kian@tgoa.com

9 The Group of Advisors BX

Mariahilfstraße 29
6900 Bregenz
CEO Philipp Tschol
philipp@tgoa.com

Request our comprehensive market overview: media@tgoa.com



COPYRIGHT

© 2023 The Grand Orchestra Audience and/or its affiliates, as hereby The Group of Analysts. All rights reserved.

The Group of Analysts is a Knowledge Trademark of The Grand Orchestra Audience and its affiliates. This publication may not be reproduced or distributed in any form without The Group of Analysts' prior written permission. It consists of the opinions of The Group of Analysts' research organization, which should not be construed as statement of fact. While the information contained in this publication has been obtained from sources believed to be reliable, The Group of Analysts disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although The Group of Analysts' research may address legal and financial issues, The Group of Analysts does not provide legal or investment advice and its research should not be construed or used as such. Your access to and use of this publication are governed by The Grand Orchestra Audience's Usage Policy. The Group of Analysts prides itself on its reputation for independence and objectivity. Its research and analysis is produced independently by its Analyst House organization without input or influence from any third party.

WWW.TGOA.COM

4ALLPORTAL
AKENEO
APOLLON
BAYARD
BERTSCH INNOVATION
BLUESTONE PIM
CENSHARE
CONTENTSERV
CROSSBASE
EGGHEADS
GEPARD
GOODSON
INCONY
INFORMATICA
INFUNIQ
INRIVER
INSIGHTSOFTWARE
ITB
KATANAPIM
KITTELBERGER
LOBSTER
MYVIEW
NOVOMIND
PERFION
PIMCORE
PIMICS
PIMWORKS
PIROBASE IMPERIA
PLYTIX
PRECISELY
PRODEXA
QUABLE
SALES LAYER
SALSIFY
SAP COMMERCE CLOUD
SEPIA
SOLIDPEPPER
STIBO SYSTEMS
SYNDIGO
VIAMEDICI

THE PIM REPORT

TABLE

EXECUTIVE SUMMARY	
The role of the system integrator	9
PIM vendors	9
REPORT FOCUS	
Product Information Management	10
Ability to perform	12
Market Performance	12
Future proof	15
Technology	15
MPW Synopsis	15

11 out of the 40 vendors have a clear focus on data in the context of PIM/MDM, providing customers a complementary offering through integration or microservices from cloud platforms in addition to their PIM/MDM software.

11 OUT OF 40

METHODOLOGY

Methodology	16
-------------	----

THE PIM MARKET

Market size and forecast	19
Main drivers of growth	19

IMPLICATIONS FOR THE VENDOR SELECTION

Where to start	22
Identifying relevant vendors	24
Vendor workshops	24

35%

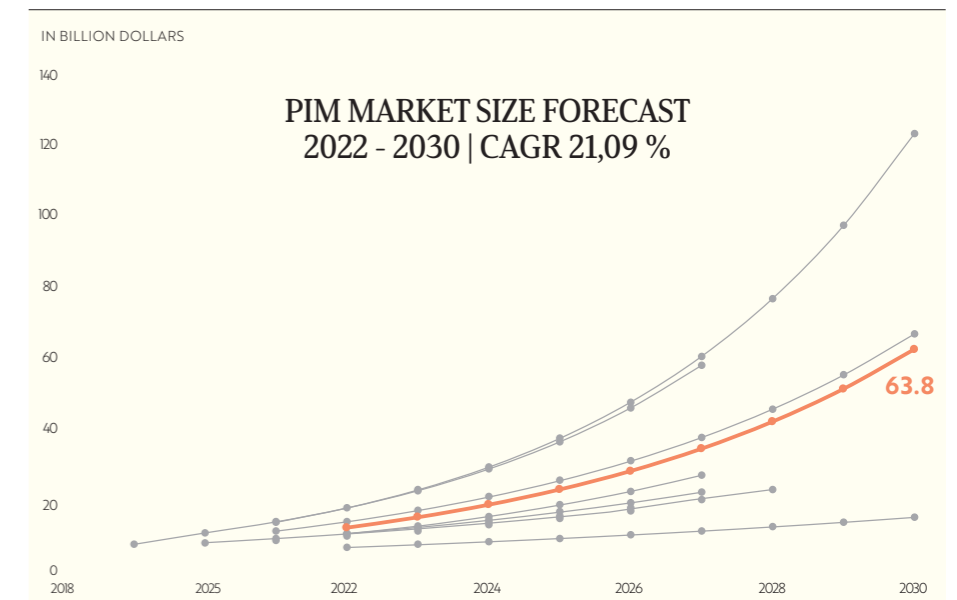
With only 35 per cent of the total achievable points, responding to new tech concepts is a main differentiator in the PIM market.

OF CONTENTS

07

EXECUTIVE SUMMARY

According to the findings of this report, the global PIM market will reach USD 63.8 billion by 2030, growing at a CAGR of 21,09 per cent.



SUMMARY OF MARKET PERFORMANCE

The big picture	27
Marketing performance	30
Partner network	30
Reaction to new tech concepts	31
Technology focus	34

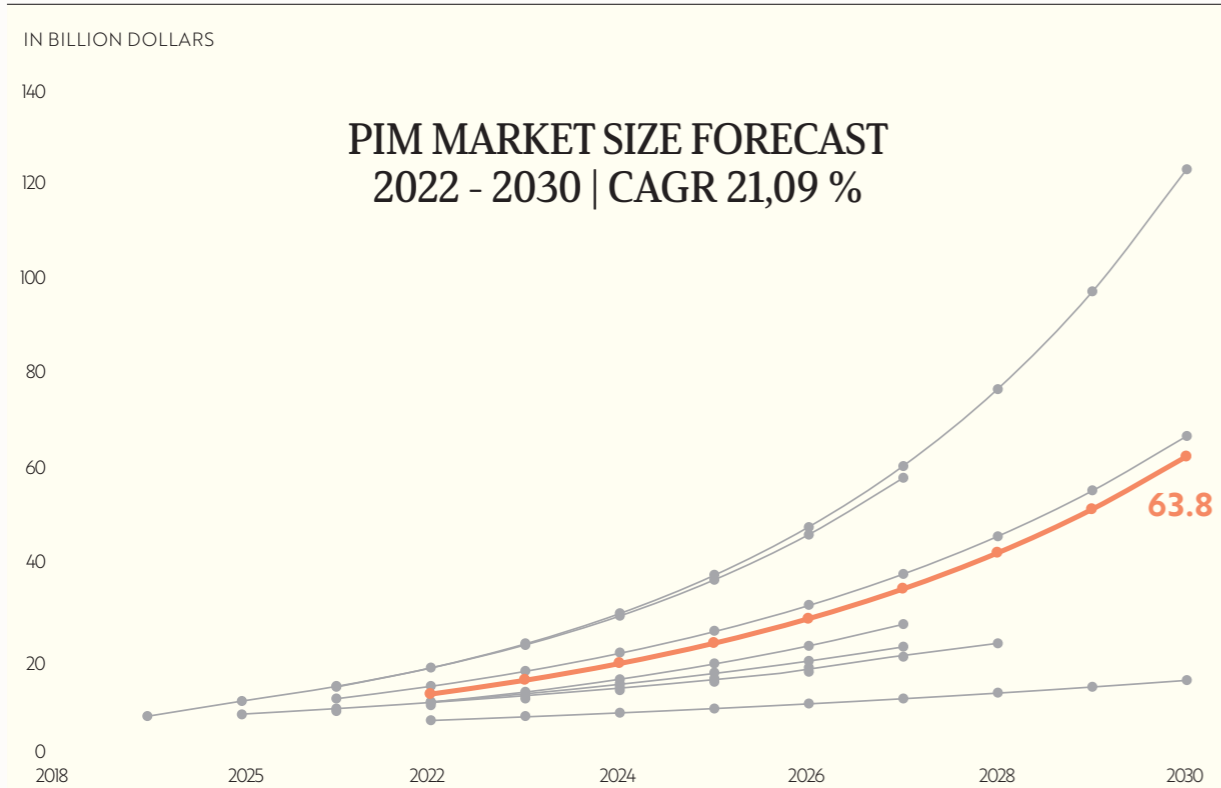
VENDOR PROFILES

4allportal	38
Akeneo	39
apollon	40
BAYARD	41
Bertsch Innovation	42
Bluestone PIM	43
censhare	44

Contentserv	45
Crossbase	46
Eggheads	47
Gepard	48
Goodson	49
Incony	50
Informatica	51
Infuniq	52
inriver	53
Insightsoftware	54
ITB	55
KatanaPIM	56
Kittelberger	57
Lobster	58
myview systems	59
Novomind	60
Perfion	61
Pimcore	62
PIMICS	63
PIMworks	64
pirobase imperia	65
Plytix	66
Precisely	67
prodexa	68
Quable	69
Sales Layer	70
Salsify	71
SAP Commerce Cloud	72
Sepia	73
Solidpepper	74
Stibo Systems	75
Syndigo	76
Viamedici	77

ABOUT

About TGOA	80
Carmela Ana Melone, Senior Analyst & Co- Founder	81
The Group of Analysts	81
Temel Kahyaoglu, Chief Analyst & Founder	81
The Group of Analysts	81



Graphic: PIM Market Size Forecast 2022-2030. Forecast from TGOA is highlighted and set into context to the estimates from other analyst firms worldwide (grey).

EXECUTIVE SUMMARY

The Group of Analysts (TGOA) estimates that the global Product Information Management market will reach USD 63.8 billion by 2030, growing at a CAGR of 21.09 per cent. This number includes PIM software products as well as services and reflects the growing importance of accurate product data for businesses across all industries and countries. In this research report, we analyse the drivers and limiting factors to this growth and take a closer look at the key areas of PIM that have a big impact on companies' vendor selection processes.

Given the increasingly important role of PIM, it comes as no surprise that new players are constantly flocking into the market since its beginning. While the first software vendors that still are relevant in the PIM market today have their origins back in the early 70s, the first bigger wave of new players was in the mid-90s. Thanks to the increasingly complex requirements of businesses and the overall developments towards more flexible and composable architectures, smaller and more specialised players are finding their niche – particularly in today's environment that is clearly focused on digital commerce and therefore requires an optimal product data base. Heavy investments that are taking place in the market are another strong sign for a continuously growing market. The main drivers the analysts at TGOA identify are:

/ DATA & ANALYTICS: Data is becoming an increasingly important factor for decision-making as it helps business leaders understand their customers, products, and the market. This allows them to draw valuable insights and ultimately make more informed and better decisions.

/ OPERATIONAL EFFICIENCY: PIM is an essential part of the Information Supply Chain and as such, today's solutions offer valuable features to accelerate businesses' productivity. Workflow functions, AI, or Machine Learning support companies in reducing operational costs and responding faster to market dynamics and customer expectations.

/ SUSTAINABILITY: Fuelled by the rising awareness for environmental issues, organisations are expected to provide full transparency when it comes to their product data, including production processes and labour conditions along the entire supply chain. Information such as the CO2 footprint, water usage, biodiversity, waste management, and labour diversity is becoming increasingly important and PIM solutions are ideal tools to acquire, create, and share this data.

/ GROWTH OF E-COMMERCE: The need for expanding existing business models to the digital world, thereby unlocking new commerce potentials is shaping every industry. However, more and more companies are becoming aware that an accurate, flexible, and powerful data management basis is the prerequisite for digital commerce success.

/ REDUCED IMPLEMENTATION BARRIERS: Thanks to SaaS technology, barriers for many cost-sensitive small and mid-sized companies in terms of implementation and license costs are being reduced. Not only do many vendors offer attractive pricing models, but the implementation of these solutions is less costly and time consuming than with on-premises installations.

GET THE FULL REPORT

MORE THAN 80 PAGES CONTAINING A COMPREHENSIVE ANALYSIS OF THE PIM MARKET, ITS TRENDS AND DEVELOPMENTS, AS WELL AS IN-DEPTH PROFILES OF 40 OF THE MOST RELEVANT VENDORS.

CONTENTS:

FULL EXECUTIVE SUMMARY
REPORT FOCUS
METHODOLOGY
THE PIM MARKET
IMPLICATIONS FOR THE VENDOR SELECTION
SUMMARY OF MARKET PERFORMANCE
40 VENDOR PROFILES

THE VENDORS COVERED

4 ALLPORTAL
AKENEO
APOLLON
BAYARD
BERTSCH INNOVATION
BLUESTONE PIM
CENSHARE
CONTENTSERV
CROSSBASE
EGGHEADS
GEPARD
GOODSON
INCONY
INFORMATICA
INFUNIQ
INRIVER
INSIGHTSOFTWARE
ITB
KATANAPIM
KITTELBERGER
LOBSTER
MYVIEW
NOVOMIND
PERFION
PIMCORE
PIMICS
PIMWORKS
PIROBASE IMPERIA
PLYTIX
PRECISELY
PRODEXA
QUABLE
SALES LAYER
SALSIFY
SAP COMMERCE CLOUD
SEPIA
SOLIDPEPPER
STIBO SYSTEMS
SYNDIGO
VIAMEDICI



The Group of Analysts UG

Uferpromenade 5

88709 Meersburg

www.tgoa.com