Industrial Sustainability Service – 2023

Industrial IoT, Software & Communications Service Area
Monitor and analyze important trends, gauge market shifts and make informed business decisions.

"Over a quarter of global carbon emissions are generated from industrial processes. To address this manufacturing companies pledging carbon neutrality is accelerating as part of deployment of corporate ESGs to address sustainability concerns. Technology will play an important role in realising these promises!

Alex West
Sustainability & IIoT Analyst

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Industrial Sustainability: Deliverables

Surveys

'Voice of the customer' analysis to understand market development and to bring a fuller view of the objectives and challenges of customers
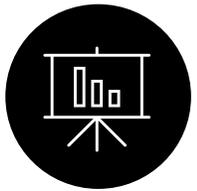
Market data

Providing market sizing and forecasts for the market for key industrial sustainability technologies and solutions

Reports

Analysis on trends affecting the market

Presentations

Quarterly scheduled briefings with analysts on research highlights from all aspects of the market.

Analyst Insights
—Ongoing—

Analyst commentary on product launches, market news and analysis.

Analyst Access
—Ongoing—

For prompt responses to urgent and unique questions.

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Industrial Sustainability: Deliverables

Surveys

- Digital Transformation Enabling Industrial Sustainability
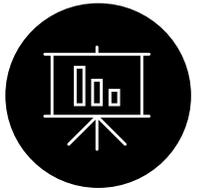- Industrial Sustainability Readiness Benchmarking

Market data

- E for ESG reporting analysis
- Emissions Monitoring Systems
- Energy Management Systems
- Industrial Sustainability Start-Up Database

Reports

Deep dive trend analysis on the factors driving industries, including market, technology and competitive trends

Presentations

Quarterly scheduled briefings with analysts on research highlights from all aspects of the market.

Analyst Insights
—Ongoing—

Analyst commentary on product launches, market news and analysis.

Analyst Access
—Ongoing—

For prompt responses to urgent and unique questions.

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Digital Transformation enabling Industrial Sustainability

Published

Analysis of the current state of adoption of environmental sustainability initiatives, the technologies being invested in and the perceived opportunities and challenges.

Respondent demographics

INDUSTRY
- Automotive
- Chemicals
- Food & Beverage
- Life Sciences
- Oil & Gas
- Semiconductor & Electronics

REGIONS
- North America
- Asia & Oceania
- Europe

COMPANY SIZE
- Small $500M - $999M)
- Medium (US$1B – US$4.99B)
- Large (>US$5B)

DECISION INFLUENCE
- Primary decision-maker
- A lot of influence
- Some influence

BUSINESS FUNCTION
- CIO/IT director
- IT manager
- Operations
- CTO/technology director
- Engineering
- Facility/Plant management
- Energy management
- Sustainability management

Topics included

- Level of organization focus on operational sustainability
- Priority applications influencing investment
- Motivators driving investment
- Impact of various challenges on investment plans
- Roles and responsibility around sustainability
- Maturity and impact of sustainability initiatives across business functions
- Energy management function deployment status
- The impact of technology on sustainability
- The use of digital twin for sustainability
- Attitudes towards circular economy

- Industrial sustainability case studies

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E for ESG – reporting analysis

Published

Analysis of the progress the manufacturing sector is making towards sustainability goals and a comparison of the footprint of different industry sectors and the degree of success in minimizing environmental impacts.

CRITERIA INCLUDED

Consumption
- Energy
- Renewable energy
- Water
- Waste
- Waste recycled
- CO2e Emissions
  - Scope 1 emissions
  - Scope 2 emissions
  - Scope 3 emissions

Intensity (per $M revenue)
- Energy
- Renewable Energy
- Waste
- Waste recycled
- Water
- CO2e Emissions
  - Scope 1 emissions
  - Scope 2 emissions
  - Scope 3 emissions

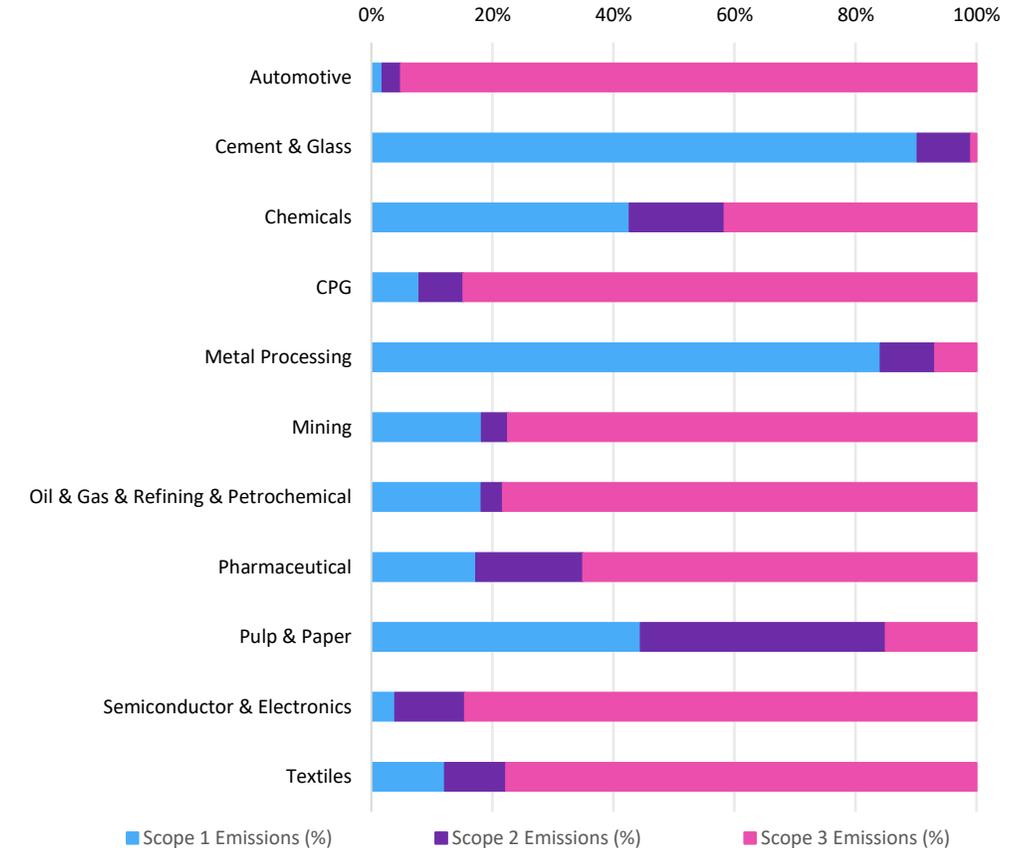## Ratios
- Renewable energy as a % of total energy use
- Waste recycled as a proportion of total waste
- Ratio of emissions by scope

INDUSTRY SECTORS INCLUDED
- Automotive
- Cement & Glass
- Chemicals
- Consumer Packaged Goods (CPG)
- Metals Processing
- Mining
- Oil, Gas, Refining and Petrochemical
- Pharmaceutical
- Pulp & Paper
- Semiconductor & Electronics
- Textiles

Ratio of emissions by scope in 2020

Source: Omdia

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Industrial Sustainability Readiness Benchmarking

Published

Understand where manufacturers are today and their plans for next year in developing and meeting sustainability targets. Compare company types and persona to understand the leaders and laggards, who to target and how to tailor a solution to their requirements

Respondent demographics

INDUSTRY
- Automotive
- Chemicals
- Consumer Packaged Goods (CPG)
- Metals & Mining
- Oil & Gas
- Semiconductor & Electronics

REGIONS
- North America
- Asia & Oceania
- Europe

COMPANY SIZE
- Small (<US$500M)
- Medium (US$500M – US$1B)
- Large (>US$1B)

JOB FUNCTION
- Executive (VP level and above)
- Director
- Manager

BUSINESS FUNCTION
- IT Management
- Engineering
- Energy Management
- Sustainability Management
- Facility / Plant Management
- Operations & Production
- Maintenance

Topics included

- State of maturity of environmental sustainability strategy and initiatives
- Expected progress over the next 12 months
- Budget availability and expected changes to investment over the next 12 months
- Viability of sustainability goals
- How does sustainability impact business goals such as profitability
- Accessibility of sustainability related data
- Technology investment to support sustainability
- Allocation of responsibility for sustainability
- Internal transparency on sustainability objectives of organization
- Availability of necessary skillsets and training programs to build competency
- Impact of sustainability on relationships with customers and suppliers
- Priority sustainability objectives for investment

- Commitments to / Current levels of monitoring of / Progress towards
  - GHG emissions reduction
  - Renewable energy transition
  - Implementation of energy and environmental management systems
  - Water consumption reduction
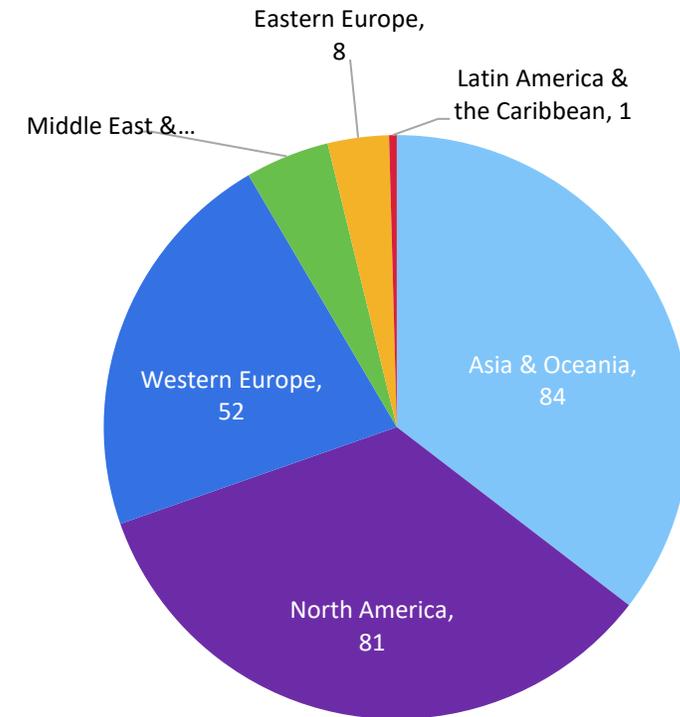 - Waste reduction

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Start up database (quarterly)

Database of start-ups supporting industrial companies with sustainability enabling technology. These insights can support tracking new technology developments and M&A opportunities.

CRITERIA INCLUDED

- Location
- Company description
- Number of employees
- Company growth
- Investment
  - Funding level
  - Type of most recent funding
  - Round
  - Lead investors

- Technologies (examples)*
  - Carbon Capture
  - Battery Recycling
  - Digital Product Passport
  - Digital Twin for Sustainability
  - Energy Management
  - Emissions Monitoring
  - Plastics recycling
  - Tire recycling
  - Water Management
  - Waste Management

 * examples of technologies that may be covered, service subscribers can influence final technologies included

Number of industrial sustainability start-ups by region, 2022

- Eastern Europe, 8
- Latin America & the Caribbean, 1
- Middle East &…
- Western Europe, 52
- Asia & Oceania, 84
- North America, 81

Source: Omdia

Not real date

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Industrial Energy Management Systems

Due TBD

MEASURES

- 2022-2027 forecast across all 3 regions and all countries
  - Hardware
  - Software
  - Services

- 2022 company market shares by world and region

REGIONS

- EMEA
- Americas
- Asia & Oceania

SERVICES

- Implementation & Integration
- Monitoring & Control
- Maintenance
- Consulting & Training

HYBRID AND PROCESS INDUSTRY SECTOR

- Cement & Glass
- Chemicals
- Food & Beverage
- Minerals and Metals
- Mining
- Oil & Gas
- Pharmaceuticals
- Power Generation
- Pulp & Paper
- Refining & Petrochemical
- Water & Wastewater
- Other Process Sectors

DISCRETE INDUSTRY SECTOR

- Automotive
- Machinery manufacturing
- Semiconductor & electronics
- Other discrete industries

REGION

Asia and Oceania

- China
- Japan
- India
- Australia
- South Korea
- Rest of Asia & Oceania

Europe, Middle East & Africa

- France
- Germany
- Italy
- Spain
- UK
- Nordic Countries
- Middle East and Africa
- Rest of Europe

Americas

- Brazil
- Canada
- Mexico
- US
- Rest of Americas

LOCATION

- Cloud
- On-premises
- Hybrid

OTHER SEGMENTATIONS

To be defined by service subscribers

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Emissions Monitoring Systems

Due TBD

MEASURES
- 2022-2027 forecast across all 3 regions and all countries
  - Hardware
  - Software
  - Services

- 2022 company market shares by world and region

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- Americas
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SERVICES
- Implementation & Integration
- Monitoring & Control
- Maintenance
- Consulting & Training

TECHNOLOGY
- Continuous Emissions Monitoring (CEMs)
- Predictive Emissions Monitoring (PEMs)

EMISSIONS TYPE
- Carbon Monoxide
- Carbon Dioxide
- Hydrocarbons
- NOx
- SOx
- Others to be defined

HARDWARE
- Analyzers
- Data Acquisition Systems
- Sensors
- Consulting & Training

HYBRID AND PROCESS INDUSTRY SECTOR
- Cement & Glass
- Chemicals
- Food & Beverage
- Minerals and Metals
- Mining
- Oil & Gas
- Pharmaceuticals
- Power Generation
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Asia and Oceania
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- India
- Australia
- South Korea
- Rest of Asia & Oceania

Europe, Middle East & Africa
- France
- Germany
- Italy
- Spain
- UK
- Nordic Countries
- Middle East and Africa
- Rest of Europe

Americas
- Brazil
- Canada
- Mexico
- US
- Rest of Americas

LOCATION
- Cloud
- On-premises
- Hybrid

OTHER SEGMENTATIONS
To be defined by service subscribers

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Digital Marketing Engagement Services

In addition to the Industrial Sustainability Service customers have the opportunity to leverage Omdia support for everything from Business Strategy to Go-To-Market and Implementation through Informa Tech's market intelligence. We help you to map the customer journey, and leverage our digital marketing engagement services to reach the right audience.

"4 STEPS TO OPTIMIZE THE CUSTOMER JOURNEY & DELIVER A STRONGER SALES FUNNEL"

1. TARGET	From our latest research (Fall 2022), Marketing executives face 5 challenges:		MRLs
	• Awareness	Brand + Content	
2. REACH	• Interest	Solution understanding	SRLs
3. ENGAGE	• Consideration	Differentiate + ROI	OPPORTUNITIES
	• Conversion	Value	
4. INFLUENCE	• Retention	KPI performance	WINS

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Digital Marketing Engagement Services

Through Informa Tech's Digital Marketing Engagement Services, you can:

TARGET	REACH	ENGAGE	INFLUENCE
An average of 7 people are involved in a manufacturing project, it's evaluation, recommendation and decision-making process.	**An integrated approach to reach your target audience**	**Create high-value content aligned with your audience**	**Inform and educate to create higher quality lead generation**
• Through our intelligence, gain a deeper understanding of the market	• Email	• Infographics	• Lead nurture
• Define your audience	• Social Media	• Webinar companion report	• Increase your SalesForce pipeline
• Develop a more effective Go-To-Market strategy	• Webinars	• Explainer Videos	• Marketing ready leads
• Target the right audience	• Customer e-Blasts	• Industry Voice	• Sales ready leads
• Comprehensive targeting	• Audience Extension	• End user surveys	• Create new SalesForce opportunities
	• Virtual roundtable events	• White papers	• Accelerate existing Sales Force opportunities
	• Digital symposiums	• eBooks	• Increase your Sales Team's productivity, effectiveness and win rate
	• Market Leader Programs	• eNewsletters	
		• Fast Chat video interview	
		• Data visualization videos	
		• Top Ten / Top Tips	

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Our "Ask an Analyst" Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia's support team is here to help.

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:

Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Tom Coate
Customer Success Manager

Kâren Dyer
Customer Success Manager

96%
of our customers rate our service as Excellent or Very Good

OMDIA

Thank you

Disclaimer

Get in touch!

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