IDC MarketScape

IDC MarketScape: Worldwide Life Sciences Intelligent Supply Chain Services 2025 Vendor Assessment

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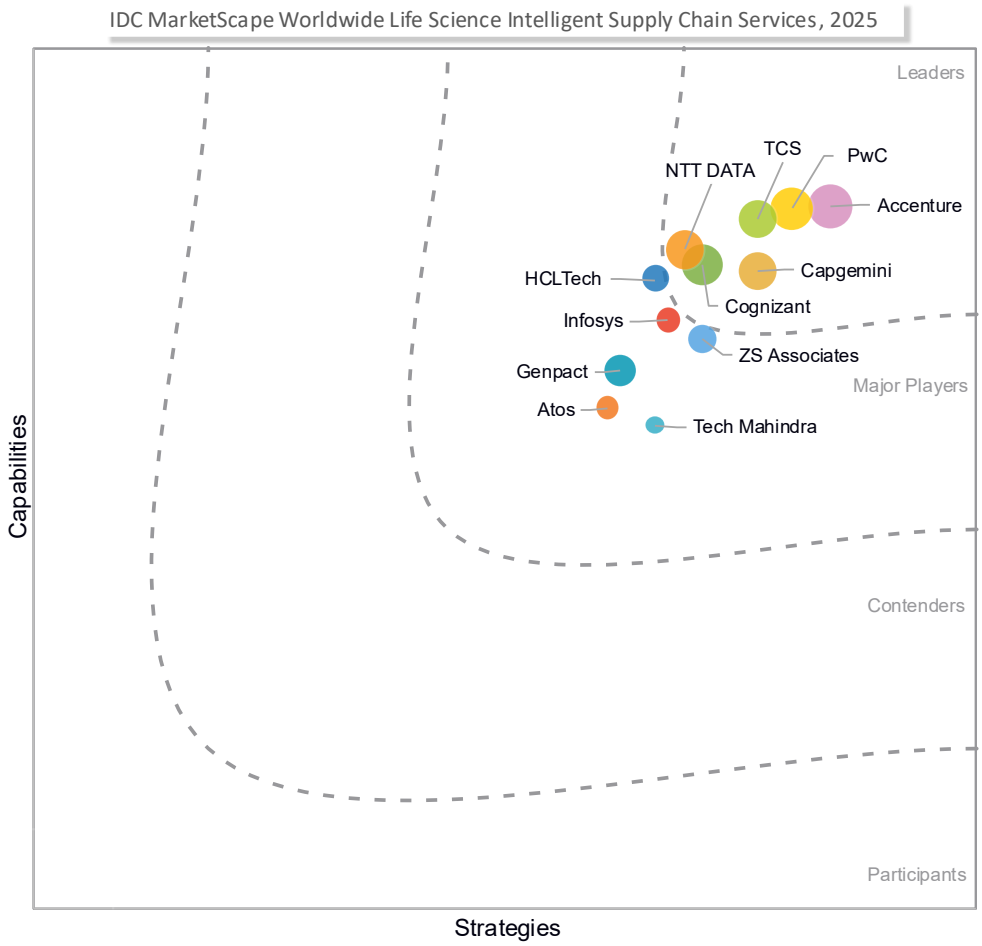
THIS EXCERPT FEATURES PWC AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Life Sciences Intelligent Supply Chain Services 2025 Vendor Assessment



Source: IDC, 2025

August 2025, IDC #US51047023e

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Life Sciences Intelligent Supply Chain Services 2025 Vendor Assessment (Doc # US51047023).

IDC OPINION

Life sciences organizations worldwide are navigating an increasingly complex landscape. As tariffs and reciprocal trade measures escalate amid ongoing geopolitical tensions, economic uncertainty, and regulatory pressures, these organizations face unprecedented supply chain challenges. The industry's heavy reliance on global supply chains has exposed significant vulnerabilities, with rising supplier costs, volatile demand, and shifting trade and compliance requirements emerging as critical concerns for pharmaceutical, biotech, and medical device organizations.

For life sciences organizations, mitigating supply chain risks and enhancing resilience increasingly depend on supply diversification, improved operational efficiencies, and enhanced supply chain agility and end-to-end visibility. A lack of supply chain visibility and agility was identified as the most pressing challenge by nearly 50% of life sciences respondents in IDC's 2025 *Supply Chain Survey* (April 2025). To this end, life sciences organizations are actively integrating AI-driven solutions, advanced technologies, and intelligent capabilities to enable intelligent decision-making, automation, real-time visibility, and end-to-end orchestration across the supply chain.

However, limited digital competencies, gaps in data and analytics capabilities, and the complexity of integrating new technologies with existing infrastructure continue to hinder organizations' supply chain transformation efforts. In the same survey, over one-third of life sciences organizations globally cited a lack of digital skills and analytics expertise as a critical gap that must be addressed with great urgency.

Fast-evolving regulatory requirements, rising customer and patient expectations, and increasing supply chain management complexities driven by the introduction of innovative medicines and emerging precision therapies (e.g., cell and gene therapies [CGT] and advanced biologics) underscore the need for manufacturers to intensify their efforts in enhancing supply chain agility and resilience.

This is fueling demand for intelligent supply chain services that can support life sciences organizations in bridging critical gaps in technology, skills, and capabilities

to achieve intelligent, resilient, and patient-centric supply chain operations across increasingly complex global supply chain networks.

This IDC MarketScape evaluates vendors of intelligent life sciences supply chain services that support life sciences organizations in the planning, assessment, and implementation of various supply chain management tools and solutions to help them drive intelligent supply chain transformation.

All vendors evaluated in this study have strong global delivery capabilities across key life sciences market subsegments and offer a rich portfolio of intelligent supply chain services. They share a common focus on addressing the industry's growing supply chain needs for enhanced efficiency, cost optimization, end-to-end traceability, and regulatory compliance. Furthermore, they all demonstrate a significant commitment to strengthening their AI-driven capabilities and integrating advanced digital technologies — such as generative AI (GenAI), agentic AI, Internet of Things (IoT), and digital twins — to accelerate innovation and enable intelligent supply chain operations.

While all vendors evaluated in this study exhibit strong technology capabilities, they vary in the depth and breadth of their ecosystem partnerships, industry specialization, business service capabilities, regulatory expertise, and focus across supply chain management (SCM) and life sciences functional areas. Opportunities for improvement remain for vendors in areas such as refining customer engagement strategies, sharpening industry-specific market messaging, and aligning their offerings to better meet the needs of smaller organizations and those seeking more cost-flexible, targeted support in niche areas.

As industry expectations rise, life sciences customers are demanding deeper industry-specific and regulatory expertise; stronger value demonstration; greater support in strategic planning, operational improvement, and change management; and more proactive innovation delivery that aligns closely with the unique regulatory and operational complexities of life sciences supply chains in the emerging paradigm of personalized and precision medicine.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape evaluates professional services vendors who provide IT and business services to support life sciences organizations in the planning, assessment, and implementation of various supply chain management tools. This enables life sciences organizations to make intelligent supply chain decisions and maximize the business value of SCM technology investments.

IDC has defined the following key inclusion criteria to ensure this IDC MarketScape is a fair assessment of vendors who are active in this market:

- The vendor must have a global presence, serving life sciences customers in at least two global regions (Europe, North America, Asia/Pacific, Latin America, or the Middle East and Africa).
- The vendor must be offering both IT and business services to life sciences organizations to support them in the planning, assessment, and implementation of various supply chain management tools and solutions.
- The vendor must have a minimum annual revenue of $1 billion. At least 20% of the vendor's revenue must be generated from IT services and at least 5% from business services, rendered across all industries.
- The vendor must be offering a mix of systems implementation and integration, strategic business consulting, and business process outsourcing (BPO) services across a broad range of SCM areas and functions.
- The vendor must have at least 10 years of experience in life sciences and at least 10 life sciences customers for its supply chain services.

Twelve vendors qualified for inclusion in this IDC MarketScape for Worldwide Life Sciences Intelligent Supply Chain Services 2025:

- Accenture
- Atos
- Capgemini
- Cognizant
- Genpact
- HCL
- Infosys
- NTT Data
- PwC
- TCS
- Tech Mahindra
- ZS

ADVICE FOR TECHNOLOGY BUYERS

The evolving life sciences landscape is marked by escalating cost pressures, shifting trade policies, growing regulatory complexities, and evolving therapeutic paradigms; this demands new levels of supply chain agility and resilience. In this new paradigm, embedding intelligence across the supply chain life-cycle is becoming imperative for life sciences organizations.

As pharmaceutical, biotech, and medical device organizations accelerate efforts to modernize and future-proof their supply chains, the choice of the right technology and services partners presents a significant challenge. This research suggests the

key attributes life sciences organizations should consider when selecting intelligent supply chain services partners include:

- **Deep industry experience and expertise:** In-depth industry knowledge and established experience in managing industry-specific supply chain processes (e.g., clinical trial logistics, serialization, and cold chain management) alongside deep regulatory expertise and robust frameworks to enable regulatory compliance with stringent industry standards and regulations
- **Value demonstration and time to value:** Demonstrated ability to deliver measurable business outcomes at speed and scale, including enhanced supply chain visibility, accelerated implementation timelines, improved cost efficiency, and sustained operational performance
- **Global delivery capabilities and scalability:** Strong capabilities to manage operational complexities across global supply chain networks, supporting both large-scale, enterprise-wide transformation initiatives and targeted operational requirements through scalable resources and localized expertise
- **Customer-centricity and end-to-end support:** The ability to deliver end-to-end services from strategic planning to execution — including managing associated organizational, operational, and cultural changes — through flexible customer-centric engagement models that can adapt to support focused applications in smaller-scale or budget-limited engagements
- **Proactive innovation delivery:** Proven expertise in innovative technologies (including AI, GenAI, digital twins, and IoT), complemented by a proactive approach to innovation delivery, consistently anticipating customers' needs, enabling co-innovation, and ensuring alignment with emerging market trends

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

PwC

After close evaluation of its offerings and capabilities, IDC has positioned PwC in the Leaders category in this 2025 IDC MarketScape for worldwide life sciences intelligent supply chain services.

PwC is a privately held company headquartered in London and New York. It was formed in 1998 from a merger between Price Waterhouse and Coopers & Lybrand. PwC operates in more than 150 countries and has a global workforce of over 370,000 employees. It employs approximately 17,000 people within its Global Health Industries division and has more than 25 years of experience in the life sciences industry. PwC's large customer base includes most of the prominent global life

sciences companies in diverse market segments and regions, with a significant client base in North America and Europe.

IDC notes that this evaluation is based on publicly available information and its existing knowledge of the company.

Core Value Proposition

PwC offers a comprehensive portfolio of supply chain services tailored to the life sciences industry, supporting clients across the full supply chain transformation life cycle. Its range of supply chain services spans systems implementation and integration, strategic consulting, and selected BPO services.

With over 17,000 dedicated life sciences professionals and more than 5,000 supply chain specialists, PwC delivers a full range of strategy, business, and technology services to support complex supply chain transformation initiatives. It maintains strategic alliances with SCM technology vendors such as SAP, Oracle, Blue Yonder, Coupa, Kinaxis, Microsoft, IBM Sterling, Manhattan, and o9.

These capabilities enable PwC to address the diverse supply chain needs of its life sciences customers. Its services are delivered through an integrated model, supported by more than 150 delivery centers worldwide. PwC's multidisciplinary teams work closely with client stakeholders throughout projects to ensure close alignment with business objectives. The company's customer service delivery approach is underpinned by its proprietary BXT (Business, Experience, Technology) methodology, which supports strategic alignment, user-centric design, and technology execution. PwC also offers a broad set of prebuilt, industry-specific accelerators to drive speed and value in deployments. Its proprietary tools (e.g., the Data Quality & Governance Toolkit, S&OP Digital Playbook, and Control Tower Signal Analyzer) enhance planning, execution, and decision-making across the supply chain.

Its deep industry expertise, diverse talent pool, and technology capabilities enable PwC to provide services in all major SCM areas, from planning to fulfillment. PwC has demonstrated success in engagements with life sciences organizations to drive visibility, resilience, and compliance across global supply networks. This includes supporting industry-critical areas such as cold chain logistics, serialization, and unique device identification (UDI) compliance and delivering strategic advisory services in areas such as supply chain assessments, operating model design, and distribution strategy optimization.

Customers particularly value PwC's ability to help them navigate the complexities of global supply chains while maintaining regulatory compliance. This includes services that support drug serialization and UDI compliance. PwC is also working to expand its capabilities in sustainability planning and global trade compliance.

PwC is actively investing in innovative technologies such as AI, GenAI, and agentic AI, with a focus on enabling intelligent automation and orchestration across complex supply chain ecosystems. PwC supported a major global pharmaceutical customer in leveraging GenAI for automating process documentation as part of a broader supply chain transformation initiative. It is also developing use cases across various supply chain areas, including demand forecasting, procurement, inventory optimization, and regulatory compliance.

PwC's innovation roadmap stresses platform flexibility, AI enablement, and business value realization. In addition to the SCM vendors listed above, its robust partner ecosystem includes niche technology providers and specialized industry players. This partner ecosystem further supports co-innovation and enhances PwC's ability to deliver integrated, end-to-end supply chain services.

Strengths

PwC brings together a diverse talent pool, broad range of expertise, deep industry knowledge and strong technology capabilities to support life sciences organizations' supply chain transformation initiatives. PwC has been recognized for:

- **Diverse industry-tailored and client-ready capabilities:** PwC's expertise extends to multiple industry segments and functional areas. The company delivers a broad set of capabilities across various functional, operational, and technology domains, enabling intelligent end-to-end transformation of clinical and commercial supply chains. PwC also leverages a wide range of prebuilt, industry-specific tools and accelerators that enable the rapid deployment of supply chain solutions, accelerating time to value, enhancing efficiency and resilience, and mitigating risks.
- **Outcome-driven approach for sustainable impact:** In its engagements with life sciences organizations, PwC employs an outcome-driven model that emphasizes long-term value creation through structured transformation. Its multidisciplinary teams — spanning industry, functional, and technology domains — work closely with customer stakeholders from strategy through execution. PwC leverages robust methodologies for change management and user feedback integration to ensure strong alignment with business objectives and sustainable impact. This approach also contributes to customer satisfaction and long-term retention.
- **Global scale with local expertise:** PwC's extensive global footprint enables it to support large-scale supply chain transformation initiatives across multiple geographies. With delivery capabilities in nearly 150 countries, PwC offers global reach with local expertise to address the supply chain needs of life sciences clients in diverse geographies, market segments, and organizational scales.
- **Data-driven transformation with regulatory rigor:** PwC combines advanced analytics and data-driven capabilities with deep regulatory expertise to support life sciences organizations in embedding intelligence into their supply chain operations while maintaining strict compliance. Customers value

PwC's ability to support adherence to industry standards and regulatory requirements. PwC also places a strong emphasis on safeguarding security in customer service delivery throughout the project life cycle, with its teams trained in robust data protection protocols.

Challenges

While PwC excels in customer-centric delivery and broad industry and cross-functional expertise, cost considerations may pose potential barriers for some life sciences customers, especially organizations prioritizing short-term value. IDC believes more flexible pricing models could help PwC better address the needs of life sciences organizations with constrained budgets or those focused on narrowly scoped systems integration projects rather than full-scale transformation initiatives.

Consider PwC When

Life sciences organizations should consider PwC as a trusted partner for modernizing and transforming global supply chain operations. With its broad global footprint, strong industry experience, multidisciplinary capabilities, and deep regulatory expertise, PwC is an ideal fit for life sciences organizations requiring broad, cross-functional expertise to support complex, multinational projects spanning diverse jurisdictions and regulatory environments. It is a particularly strong choice for organizations undertaking compliance-driven supply chain initiatives (including compliance with serialization and UDI requirements) and for organizations focused on long-term value creation through end-to-end supply chain transformation.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Intelligent Supply Chain Services

For the purposes of this study, **intelligent supply chain services** are defined as a combination of business and IT services that assist life sciences organizations in the planning, assessment and implementation of various supply chain management (SCM) tools and solutions to enable them to make intelligent supply chain decisions, plan and implement supply chain solutions, improve supply chain processes and transform operations, and maximize the business value of their SCM technology investments. As defined in this study, intelligent supply chain services include strategy and transformation consulting, systems implementation and integration, and business process outsourcing (BPO) services.

- **Strategy and transformation consulting:** For the purposes of this study, strategy and transformation consulting refers to business consulting services that involve strategic consulting, operational improvement, and organizational change consulting services rendered to life sciences organizations to help them define the strategy and design and implement the structures and processes to reach their SCM goals.
- **Systems implementation and integration:** In the context of this study, systems implementation and integration is defined as a process that includes the planning, design, implementation, and project management of technical solution(s) that address life sciences organizations' supply chain needs. These projects may involve the implementation and integration of different supply chain applications from a broad range of vendors. When these projects involve contracting for custom application development related to systems implementation and integration, these activities are also included in the scope

of this assessment. This may include, for example, the development of adjacent tools and task apps to augment the capabilities of the SCM suite.

- **Business process outsourcing (BPO):** IDC defines business process outsourcing as the transfer of the management and execution of one or more complete business activities, business processes, or entire business to a BPO vendor. For the purposes of this study, BPO contracts with life sciences companies can include the transfer of management and execution of entire SCM functions or discrete segments therein.

These services are delivered to life sciences organizations to support a broad range of SCM areas, including (but not limited to) demand planning, supply planning, track and trace and serialization, cold chain monitoring and management, inventory management and optimization, control tower/supply chain orchestration, warehouse management, order management, transportation management, and global trade management.

LEARN MORE

Related Research

- *2025 Supply Chain Survey Life Sciences Industry Findings and Implications* (IDC #US53662025, July 2025)
- *The Technology Impact of the New Trump Administration, 2025: Life Sciences, Medtech Companies, Healthcare Providers, and Healthcare Payers* (IDC #US53552525, June 2025)
- *Batch Release Digitalization in Life Sciences: Enhancing Quality, Productivity, and Compliance* (IDC #US53041225, May 2025)
- *Generative AI Use Case Taxonomy, 2025: The Life Sciences Industry* (IDC #US52220325, May 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Life Sciences Organizations Worldwide, 2025* (IDC #US53345625, May 2025)
- *Worldwide GenAI Industry Use Case Early Adoption Trends, 2025: Life Sciences* (IDC #US53317424, April 2025)

Synopsis

This IDC MarketScape evaluates vendors of worldwide life sciences intelligent supply chain services. These vendors offer life sciences organizations a combination of business and IT services to support them in the planning, assessment, and implementation of various supply chain management tools and solutions to drive intelligent supply chain transformation. This assessment is based on essential criteria life sciences organizations must consider when selecting service partners for this transformation journey to maximize the business value of their supply chain technology investments.

“The evolving life sciences landscape demands new levels of supply chain agility and resilience while ensuring regulatory compliance and enhancing customer and patient experiences. To future-proof themselves, life sciences organizations must achieve intelligent, resilient, and patient-centric supply chain operations across increasingly complex global supply chain networks. Selecting suitable service partners can help them bridge critical gaps in technology, skills, and capabilities on this transformation journey toward future-ready intelligent supply chains.” — Research Manager Nino Giguashvili, IDC Health Insights Worldwide Life Sciences Commercial Strategies

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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