SAP Market Intelligence Report 2025–2026

Strategic Insights into the Global SAP Ecosystem

Powered by Span Global Services | January 2026

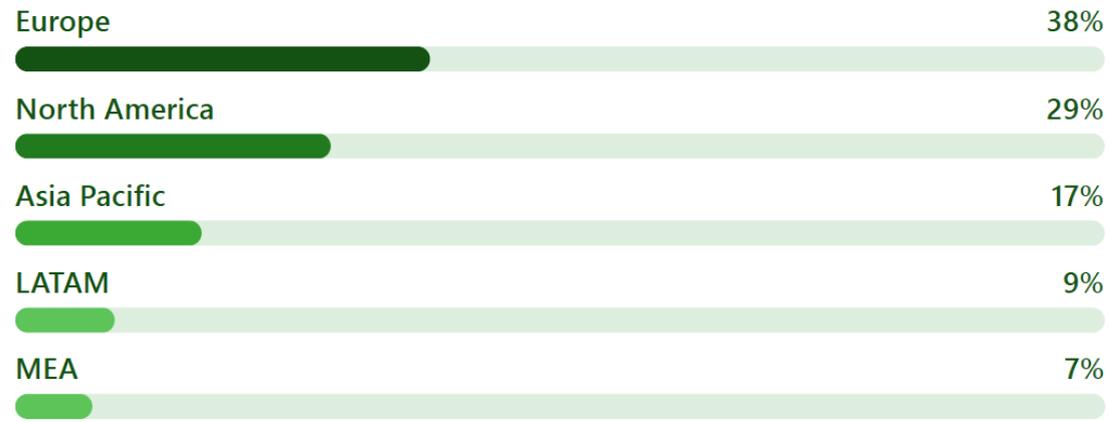| VERIFIED CONTACTS	COMPANIES	EMAIL ACCURACY
2.8M+	**820K+**	**95.4%**

SAP at a Glance

Ecosystem overview and key platform metrics as of January 2026

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TOTAL USERS GLOBALLY	COMPANIES TRACKED	MARKET COVERAGE	DATA REFRESH CYCLE	GEOGRAPHIC REACH
8.7M+	**820K+**	**60+**	**75**	**6**
Licensed SAP system users	Verified business entities	Countries with SAP deployments	Days rolling verification	Continents represented

Top Regions by SAP Adoption

Region	%
Europe	38%
North America	29%
Asia Pacific	17%
LATAM	9%
MEA	7%

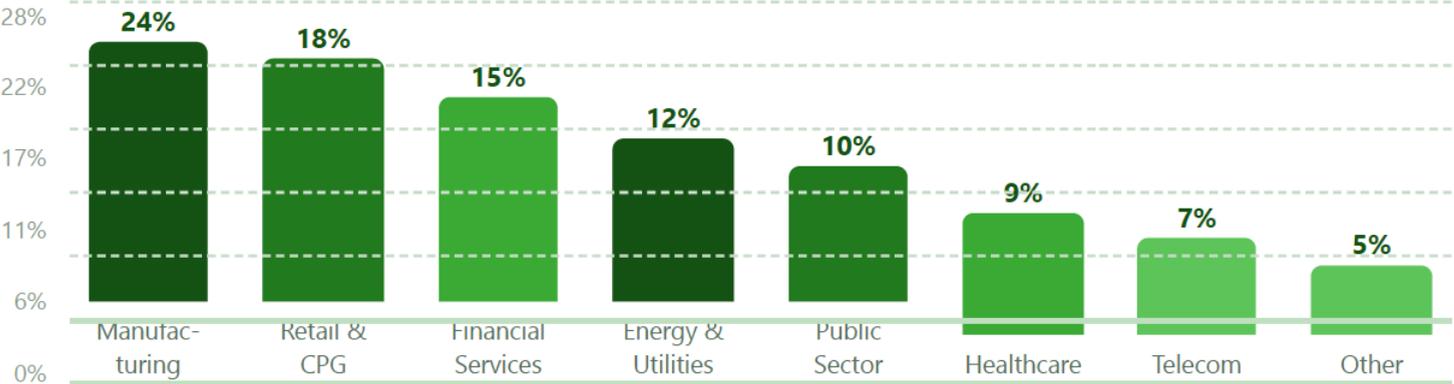Source: Span Global Services database, Jan 2026

Platform Highlights

#1 Enterprise ERP Platform Globally
SAP serves 99 of the 100 largest companies in the world and powers 87% of global commerce.

SAP S/4HANA Cloud Migration Wave
Over 26,000 customers have migrated to S/4HANA with the 2027 ECC end-of-support deadline accelerating adoption.

SAP BTP: 3,500+ Partner Extensions
Business Technology Platform hosts a rich ecosystem of industry-specific extensions and integrations.

SAP Business Network
The world's largest B2B commerce network, connecting 5.5M+ trading partners across procurement and supply chain.

Joule AI Copilot Launched in 2024
SAP's generative AI assistant is now embedded across S/4HANA, SuccessFactors, and Ariba workflows.

Industry Distribution Analysis

Which sectors rely on SAP most heavily in 2025

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Industry Breakdown by Share of SAP Users

Bar chart showing SAP user share by industry:
- Manufacturing: 24%
- Retail & CPG: 18%
- Financial Services: 15%
- Energy & Utilities: 12%
- Public Sector: 10%
- Healthcare: 9%
- Telecom: 7%
- Other: 5%

Top 3 Industries

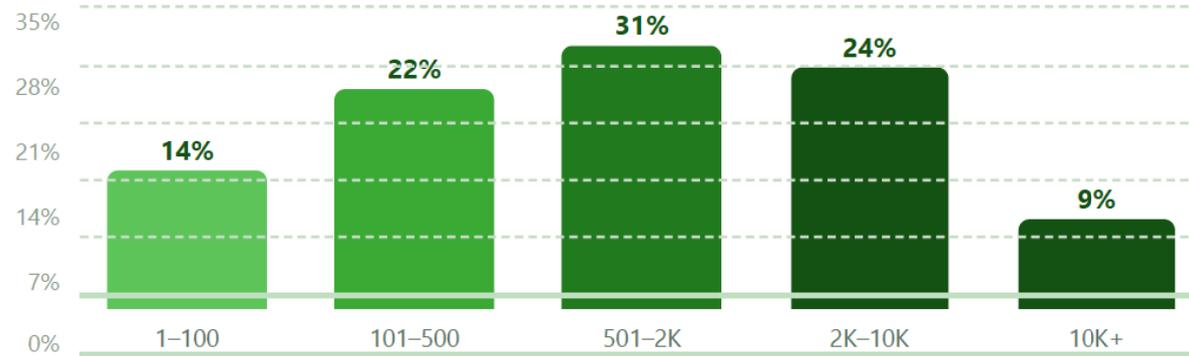| Industry	Share
Manufacturing	24%
Retail & CPG	18%
Financial Services	15%

Key Insight

Manufacturing is SAP's anchor industry, driven by demand for integrated ERP, production planning, and supply chain visibility. Complex multi-plant operations and global procurement needs make SAP indispensable for large industrial enterprises.

Company Segmentation

Size and revenue distribution across the SAP customer base

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Employee Size Distribution

1–100	101–500	501–2K	2K–10K	10K+
14%	22%	31%	24%	9%

Annual Revenue Distribution

Under $50M	$50M–$250M	$250M–$1B	$1B–$10B	$10B+
11%	24%	33%	22%	10%

MID-MARKET CORE

55%

of SAP customers have 101–2,000 employees

REVENUE SWEET SPOT

57%

of SAP organisations generate $50M–$1B annually

Segmentation Insight

Unlike many SMB-dominated software ecosystems, SAP's customer base skews toward mid-market and enterprise. The 501–2,000 employee band is the highest-concentration segment, making it the prime target for SAP system integrators, add-on ISVs, and consulting firms.

SMB Growth via SAP Business One & ByDesign

The sub-500 employee segment is growing at 16% YoY as SAP's SMB-focused products gain traction globally.

+16% YoY

Market Trends 2025–2026

Key technology and adoption shifts reshaping the SAP ecosystem

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🚀 S/4HANA Migration Urgency

With SAP ECC support ending in 2027, 43% of remaining legacy customers accelerated S/4HANA migration projects in 2025, creating a surge in SI demand.

+43% migration rate

🤖 Joule AI Copilot Adoption

SAP's generative AI assistant Joule reached 1.6M active users in 2025, embedded across Finance, HR, Procurement, and Supply Chain modules.

1.6M active users

☁ Rise with SAP Momentum

Hyperscaler-hosted SAP deployments via AWS, Azure, and GCP grew 49% YoY as organisations pursue managed cloud ERP models.

+49% YoY

🔗 BTP Integration & Extension

SAP Business Technology Platform now powers 14,000+ custom integrations, up 38% YoY, as businesses extend core ERP with industry-specific capabilities.

+38% YoY

Trend Momentum Indicators

S/4HANA ADOPTION

61%

Of SAP customers now on S/4HANA

JOULE AI UPTAKE

39%

Active Joule users among S/4HANA base

CLOUD ERP

72%

New SAP contracts are cloud or hybrid

BTP EXTENSIONS

48%

Customers run 3+ BTP-powered integrations

Convergence Signal: The ECC end-of-support deadline, combined with rising AI integration expectations and cloud-first mandates, is compressing transformation timelines. Vendors and consultancies targeting SAP decision-makers must act on precise, role-level contact intelligence to win in this accelerated market.

Strategic Opportunities

High-value market segments within the SAP user ecosystem

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Tier 1 Segments
Highest ROI targeting potential

🔧 **SAP System Integrators & Partners**
Consultancies and SIs managing ECC-to-S/4HANA migrations for enterprise clients

🏭 **Manufacturing & Industrial Firms**
Mid-to-large manufacturers running SAP ERP, MES, and SCM for production operations

💼 **CFO & Finance Function Buyers**
Finance leaders overseeing SAP S/4HANA Finance, Group Reporting, and Treasury modules

Combined addressable: 2.1M contacts

Tier 2 Segments
Strong growth and engagement signals

⚡ **Energy & Utilities Operators**
Grid operators, oil & gas firms, and utilities using SAP IS-U and Asset Management

🛒 **Retail & CPG Brands**
Omnichannel retailers leveraging SAP Customer Activity Repository and Ariba procurement

🏛 **Public Sector & Defence**
Government agencies and defence contractors on SAP Public Sector and Funds Management

Combined addressable: 980K contacts

Opportunity Scorecard
Segment attractiveness rating

SIs & Partners

Manufacturing

Finance Buyers

Energy & Utilities

Retail & CPG

Public Sector

Total Opportunity Size

3.08M

Verified, reachable contacts across all segments

Data Quality & The Span Advantage

How Span Global Services delivers superior SAP contact accuracy and depth

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Multi-Stage Verification Process

1 ERP Technographic Source Aggregation
Data collected from 230+ verified B2B sources, SAP Partner directories, and enterprise intent signals

2 AI-Powered Entity Resolution
Machine learning deduplicates and resolves subsidiary, parent, and multi-site SAP entities

3 Human Analyst Verification
320+ data specialists confirm SAP module usage and role seniority via direct outreach

4 Real-Time Email Validation
SMTP-level bounce suppression and inbox deliverability checks before every data delivery

✓ **Result: 95.4% email deliverability guaranteed**

Email Accuracy Comparison

	Span Global	Industry Avg	Competitor A	Competitor B
	95.4%	~70%	~77%	~74%

Hyper-Segmentation

50+ SAP-Specific Data Attributes
Filter by SAP module (ECC, S/4HANA, Ariba, SuccessFactors, BTP), deployment type, implementation partner, job role, seniority, industry vertical, and revenue band.

50+ segmentation filters

Compliance & Privacy

✓ GDPR Compliant   ✓ CAN-SPAM Certified   ✓ CCPA Ready

✓ CASL Ready

Recommendations & Next Steps

Strategic priorities for targeting the SAP ecosystem in 2026

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Priority 1 — Target ECC Migration Decision-Makers First

With SAP ECC support ending in 2027, CIOs and IT Directors at legacy ECC sites represent the highest-urgency buyer group across the entire SAP ecosystem.

Priority 2 — Engage Finance & Supply Chain Module Owners

S/4HANA Finance and Ariba users are active evaluators of complementary analytics, automation, and process optimisation solutions.

Priority 3 — Capitalise on Joule AI Awareness

Target SAP customers who are evaluating or piloting Joule with AI governance, change management, and productivity measurement offerings.

Priority 4 — Run Role-Level Multi-Channel Campaigns

Combine Span's verified SAP contact data — segmented by module, role, and seniority — with email, LinkedIn, and intent-driven outreach for precision ABM execution.

Ready to Access the Full SAP Database?

Contact Span Global Services for a free sample dataset and custom segment consultation tailored to your campaign goals.

www.spanglobalservices.com | **info@spanglobalservices.com**

Why Span Global Services?

- ✓ 2.8M+ verified SAP contacts
- ✓ 95.4% email deliverability rate
- ✓ 75-day rolling data refresh
- ✓ 50+ hyper-segmentation filters
- ✓ GDPR, CCPA and CAN-SPAM compliant
- ✓ Dedicated account manager support

Trusted by 5,000+ B2B marketers across 60+ countries since 2007

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