System Integrators Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The system integrator market is expected to register a CAGR of 5.8% during the period of 2022-to 2027. System Integrators specialize in conducting component subsystems together into a whole and ensuring that those subsystems function together. In today's era, manufacturing companies are introducing Flexible Manufacturing Systems (FMS) to break the classic trade-off between dependability and quality. FMS reduces labor and process variability, improving the quality of the product, and consists of various production, material handling, and computer control modules. This further demands the system integrators where the requirement of highly flexible control software makes it simple to integrate the machines with a system such as the PLC system and database.

Key Highlights
The demand for low-cost and energy-efficient production processes drives the market. The industry sector is one of the largest end-use sectors in terms of final energy demand and greenhouse gas emissions. System integrators have been involved in many traditional efficiency improvement activities like a motor replacement, inverters installation, etc., which are strictly related to energy usage reduction. But system integrators can also help a company reduce its environmental impact through operations optimization.
Connecting the information coming from the production plant and then crossing them with energy consumption information and point-of-sale (POS) details can provide reports that can help identify possible optimizations, whereas having all the information separate could not have been enlightening. Further, one can expect low-cost development tools and the necessary training and support by participating in the system integrator program.
Further, the growing use of IoT in industrial automation drives the market. The automation systems integrators are equipped with opportunity because, in most businesses, the usage of IoT solutions is shifted from being handled by the IT department to operations, and due to an existing relationship between operations and system integrators, it will, therefore, be easy for systems

integrators to cooperate with IIoT vendors.

In the current business environment, which is technology-driven, Big Data stands as one of the primary drivers of manufacturers' productivity and efficiency. With the high rate of adoption of connected devices and sensors and the enabling of M2M communication, there has been a massive increase in the data points generated in the manufacturing industry.

However, with the Covid-19 pandemic, there is a significant market slowdown in the first half of 2020 due to the stoppage of manufacturing units, infrastructure construction, etc., compared to the 2019 growth. The COVID-19 pandemic caught the oil and gas industry off guard, leaving them unprepared for a drastically altered landscape. Aircraft and automobiles were grounded. Countries exporting crude oil but not members of the Organization of Petroleum Exporting Countries (OPEC) initially opened the taps, causing oil prices to fall dramatically.

System Integrators Market Trends

Advancement of the Industrial Internet of Things (IIoT)

Implementing automation technologies such as IIoT enables power plant operators to collect real-time data and remotely monitor equipment to improve production efficiency and detect future problems. It is possible to run turbines, reciprocating engines, and solar cells/panels efficiently. Power distribution systems improve uptime, lower costs, improve data collection, improve alarm and monitoring systems, and enable autonomous problem resolution.

The IIoT is driving higher levels of connectivity in factories, especially in robotic automation systems. This connectivity enables significant productivity improvements and enhances return on investment on automation equipment.

The increased adoption of industrial automation technologies, particularly in China and India, has also contributed to market growth. Major electric product contract manufacturers have already begun to automate their operations. Massive battery manufacturing facilities are also being built to meet the growing demand for electric and hybrid vehicles. The need for industrial automation is expected to bolster the system integrator market.

Furthermore, in June 2022, READY NVIDIA, the leader in accelerated computing technology, announced a strategic investment in Robotics, the pioneers in software-defined automation. For decades, software silos between robot vendors have constrained manufacturing. It has broken down those barriers with a standard interface that simplifies enterprise deployment and significantly expands the market opportunity for the automation industry.

SCADA systems are at the root of industrial processes, assisting organizations in meeting modern demands. Yokogawa, for example, focuses on SCADA evolution to deliver high performance, high availability, broad scalability, and platform independence in their SCADA applications. As a result, organizations benefit from Yokogawa's SCADA software (FAST/TOOLS), a comprehensive, fully-integrated SCADA application suite, and the company's power and flexibility. Increasing adoption of such tools across industries is anticipated to boost the global demand for system integrators.

Further, the adoption of industrial IoT is a maturation process in which businesses gain increasing levels of benefit as they progress from basic machine connectivity to advanced approaches such as analytics, automation, and edge computing. As organizations realize the growing benefits of implementing IIoT, 73% of technology adoption expect their investment to increase in the next 12 months, with transportation and manufacturing leading O&G. Users anticipate increased achievement of business priorities such as automation and real-time monitoring as a result of this ongoing investment over the coming years.

North America to hold a significant market share

North America is anticipated to hold a significant share of the overall system integrator market. Human resources are scarce in the region, and skilled resources for complex processes are expensive. As a result, companies have increased automation in their

manufacturing plants.

Due to technological advancements, North America has been highly competitive in the industrial automation market, with the United States being a developed country that accepts advanced technologies for industrial operations. Automation solutions across industries are becoming more prevalent as 5G wireless technology becomes more widely available. Furthermore, as demand for augmented reality (AR) and virtual reality (VR) grows, the industrial automation and IoT markets are expanding.

In March 2022, Omron Automation Americas announced that it had added RAMP Inc. to its Certified System Integrator plan. RAMP is a technology development firm that creates custom automation and robotic systems. It enables customers to use IIOT to transform their factories and integrate robotics safely and effectively.

Furthermore, the region is seeing an increase in the adoption of robotic technology. For example, in 2020, Epson Robots collaborated with Air Automation Engineering (AAE), a US-based automation solutions provider, to increase technical support in the Midwest US. Furthermore, increasing government initiatives such as the Advanced Manufacturing Partnership (AMP) and Automate Canada is contributing to expanding the industrial automation market size.

System Integrators Market Competitor Analysis

The system integrator market is fragmented as various local, regional, and international players exist. Further, the players' acquisition is setting high market competitiveness. Key players are John Wood Group Plc, TESCO CONTROLS, INC., Prime Controls, LP, etc.

January 2022 - Proud Automation has been added to North America's Mobile Industrial Robots (MiR) certified system integrators. Proud Automation, an RG Group subsidiary, has been named a Certified Systems Integrator by North America's leading manufacturer of autonomous mobile robots and Mobile Industrial Robots (MiR). Furthermore, the adoption of MiR's AMRs is accelerating at an incredible rate, and companies are poised to meet customers' demands.

June 2021 - Control and Information Management Ltd. ("CIM"), an industrial automation system integrator premised in Ireland, has been acquired by ATS Automation Tooling Systems Inc., an industry-leading automation solutions provider. With the acquisition of CIM, ATS expands its automation and service capabilities for the biopharma, pharmaceutical, and other manufacturing and service industries and strengthens its digitization strategy.

Additional Benefits:

 The market estimate (ME) sheet in Excel format
3 months of analyst support

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