

## **Europe PLC - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 100 pages | Mordor Intelligence

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### **Report description:**

The Europe PLC Market size is estimated at USD 3.52 billion in 2024, and is expected to reach USD 4.14 billion by 2029, growing at a CAGR of 3.29% during the forecast period (2024-2029).

#### Key Highlights

- The deployment of PLC systems enables the identification and rectification of errors and can initiate rapid responses even without human intervention. Hence, these automated PLC systems are estimated to reduce machine downtime from 20% to almost 4%.
- One of the driving factors of the PLC market is that it has yet to replace in the automation field. Another significant factor is the development of programmable automation controllers (PACs), which integrate PLCs with PCs. Furthermore, a modular PLC can continue working while errors in other modules are being fixed.
- Member States also sponsor national initiatives such as Industry 4.0 in Germany, the Factory of the Future in Italy and France and Catapult centers in the UK. The market studied is strongly impacted by the industrial output and the investment funneled into computers and software. These PLC systems have traditionally been the foundation of process and discrete factory automation. The growing adoption of Industry 4.0 across the industrial verticals has augmented the market studied. A significant growth indicator for PLCs in the discrete-manufacturing sectors is the amplified deployment of robots across the automotive manufacturing, electrical, and electronics industries.
- The industrial robot market has witnessed a massive demand during the past decade owing to the rising adoption of smart factory systems. These robots play a vital part. For Instance, In June 2022, Realtime Robotics, one of the leaders in autonomous motion planning for industrial robots using PLC, announced a collaboration with Mitsubishi Electric Automation, Inc., a leader in automation, to accelerate industrial robot programming and control with PLC and with innovative motion control and collision avoidance software.
- The rising need for mitigating the manufacturing cost and penetration of machine-to-machine (M2M) technologies are

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encouraging the adoption of automation in the United Kingdom, which is likely to boost the usage of PLC, thereby fueling market growth.

-Germany is one of the largest producers and exporters of chemicals in the world. Automating manufacturing processes is gaining high traction in the country. PLC helps in deducing complex algorithms and enhancing performance in the sector, thus, driving the market.

-PLCs are limited by the resources, such as memory, CPU and communication bandwidth, which may affect program performance and quality which might hamper the market growth

-Additionally, the COVID-19 pandemic affected establishment of new factories and plants in the European region that served the market. However, it is anticipated that the same will start up again and continue to provide market support. Moreover, in the post-pandemic period, the PLC market has witnessed buoyant demand because most European manufacturing companies are moving towards automation, and PLCs are easy to install and troubleshoot.

## Europe PLC Market Trends

### Oil and Gas Industry to Hold Significant Market Share

- The oil and gas industry has been using various systems, such as SCADA, which needs PLCs for better control. The oil and gas end-user sector is expected to witness significant growth in the following years, owing to plans for its development in Europe. The industry has been fluctuating, in terms of oil prices, in the past two to three years, and it has been looking forward to saving various costs in the domain. The industry is adopting automation in multiple processes due to these cost-cutting activities.

- The sector has also been suffering from needing a more skilled workforce and expertise in the domain. This limitation has also been one of the primary causes behind automation. The safety systems in the oil and gas industry have also been adopting the use of PLC devices to ensure quality and performance. According to Office for Budget Responsibility, in 2023, In the United Kingdom, oil prices are expected to reach 81.9 British pounds per barrel.

- According to GP Systems GmbH, Automation in the oil and gas industry imposes stringent demands on programmable logic controllers' reliability and technical specifications (PLCs). The company's Regul RX00 PLC meets all industry requirements, provides stable and continuous operation control, resists multiple system failures, and provides flexible system design and communication between field interconnected subsystems.

- The United Kingdom government, as part of its new energy strategy, announced licensing several oil and gas projects in the North Sea (United Kingdom) to begin soon. For instance, in May 2022, BP intended to invest up to EUR18 billion (USD 19.18 billion) in the United Kingdom's energy system by the end of 2030, demonstrating BP's firm commitment to the United Kingdom and helping the United Kingdom to deliver on its strong ambitions to boost energy security and reach net zero. The United Kingdom as one of the largest oil and gas producers in the United Kingdom, BP intended to continue investing in North Sea oil and gas projects while driving down operational emissions. Such instances are expected to drive the market's growth in the region.

### Germany to Witness the Significant Growth

- Germany is a significant consumer of automation equipment and a major manufacturer of automation equipment in Europe. Several important automation and control equipment players, such as Siemens, Schneider Electric, and KUKA, are based out of Germany, thus driving a high flow of investments toward R&D activities. Due to the increasing demand for automation solutions, automation companies in the country are also one of the major reasons for the market's growth. According to Statistisches Bundesamt, the predicted revenue development of the automobile industry in Germany is expected to reach EUR 594.3 Billion (633.39 USD Billion) in 2023.

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- The electricity grid in the country needs help to cope with the extent of renewable and distributed energy in the country, and many major power projects are on hold. Similarly, the government attempts to adapt the grid to the new demands. The measures by national grid operators to boost power transmission capacity are likely to escalate PLC usage to accumulate data and further take successive steps, thereby fueling the market studied.
- The country is also globally recognized for its automobile industry. According to the BMBF, the German automobile industry expenditure on innovation in the automobile industry is EUR 49.54 Billion (USD 52.80 Billion) in 2022. Various automobile manufacturers are adopting automation, primarily due to the labor costs and increasing safety measures. Owing to such developments, the country is expected to hold significant demand for the PLC market.
- Major companies are also focused on expanding business in the country. For instance, Hitachi Drives & Automation GmbH in Dusseldorf is the German subsidiary of Hitachi Industrial Components & Equipment Ltd. Its core business is the distribution of propulsion components and automation technology. For instance, it offers frequency converters, programmable logic controllers (PLC), AC servo drives, electrical / geared motors, operator control units (HMI), and industrial inkjet printers (CIJ) / laser coders.

## Europe PLC Industry Overview

The Europe Programmable Logic Controller (PLC) Market is highly competitive in nature. The high expense on research and development, partnerships, collaborations, and acquisitions are the prime growth strategies adopted by the companies in the region to sustain the intense competition. Key players in the market are ABB Ltd, Mitsubishi Electric Corporation, Schneider Electric SE, Rockwell Automation, Siemens AG, Honeywell International Inc., Omron Corporation, Panasonic Corporation, Robert Bosch GmbH, Emerson Electric Co., and many more.

- November 2022 - Rockwell Automation and Comau partnered to leverage the power of robotic solutions to help enterprises maximize their manufacturing efficiencies and increase the speed of innovation. Integrating Rockwell Automation components and Comau's robots, using one PLC for controlling both, eliminates the need for additional robot programming skills required by other robot manufacturers.
- August 2022 - Honeywell International Inc collaborated with the University Politehnica Of Bucharest to support student entry into the global workforce by launching an industrial automation lab. The lab includes Honeywell's ControlEdge Programmable Logic Controller (PLC), which, it is possible to reduce the cost of integrating a plant, minimize unplanned interruptions, mitigate risk through embedded cybersecurity and lower overall ownership costs by working together with Honeywell Experion Process Knowledge System.

### Additional Benefits:

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

### Table of Contents:

- 1 INTRODUCTION
  - 1.1 Study Assumptions and Market Definition
  - 1.2 Scope of the Study
- 2 RESEARCH METHODOLOGY
- 3 EXECUTIVE SUMMARY

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## 4 MARKET INSIGHTS

### 4.1 Market Overview

### 4.2 Industry Attractiveness - Porter's Five Forces Analysis

#### 4.2.1 Bargaining Power of Suppliers

#### 4.2.2 Bargaining Power of Consumers

#### 4.2.3 Threat of New Entrants

#### 4.2.4 Threat of Substitutes

#### 4.2.5 Intensity of Competitive Rivalry

### 4.3 Impact of COVID-19 on the Europe Programmable Logic Controller (PLC) Market

## 5 MARKET DYNAMICS

### 5.1 Market Drivers

#### 5.1.1 Increased Adoption of Automation Systems

#### 5.1.2 Ease of Use and Familiarity with PLC Programming to Sustain Growth

### 5.2 Market Challenges

#### 5.2.1 Demand for Customization of Products and Gradual Shift from Batch to Continuous Processing in the Discrete Industries

#### 5.2.2 Increase in Adoption of Distributed Control Systems (DCS), with Enhanced Safety and Advanced Control Capabilities

## 6 MARKET SEGMENTATION

### 6.1 By Type

#### 6.1.1 Hardware and Software

##### 6.1.1.1 Large PLC

##### 6.1.1.2 Nano PLC

##### 6.1.1.3 Small PLC

##### 6.1.1.4 Medium PLC

##### 6.1.1.5 Other Hardware Types

#### 6.1.2 Service

### 6.2 By End-user Industry

#### 6.2.1 Food, Tobacco, and Beverage

#### 6.2.2 Automotive

#### 6.2.3 Chemical and Petrochemical

#### 6.2.4 Energy and Utilities

#### 6.2.5 Pharmaceutical

#### 6.2.6 Oil and Gas

#### 6.2.7 Other End-user Industries

### 6.3 By Country

#### 6.3.1 Europe

##### 6.3.1.1 Germany

##### 6.3.1.2 United Kingdom

##### 6.3.1.3 France

##### 6.3.1.4 Italy

##### 6.3.1.5 Rest of Europe

## 7 COMPETITIVE LANDSCAPE

### 7.1 Company Profiles

#### 7.1.1 ABB Ltd

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- 7.1.2 Mitsubishi Electric Corporation
- 7.1.3 Schneider Electric SE
- 7.1.4 Rockwell Automation
- 7.1.5 Siemens AG
- 7.1.6 Honeywell International Inc.
- 7.1.7 Omron Corporation
- 7.1.8 Panasonic Corporation
- 7.1.9 Robert Bosch GmbH
- 7.1.10 Emerson Electric Co.
- 7.1.11 Hitachi Ltd
- 7.1.12 General Electric Co.
- 7.1.13 Beckhoff Automation

## 8 INVESTMENT ANALYSIS

## 9 FUTURE OF THE MARKET

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