

Industrial Automation Software - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Industrial Automation Software Market size is estimated at USD 37.84 billion in 2024, and is expected to reach USD 55.34 billion by 2029, growing at a CAGR of 7.90% during the forecast period (2024-2029).

Industrial automation software is the support system in controlling the overall industrial process. The increasing dynamic needs of various industries and complex operations and processes are driving the demand for industrial automation software. Industrial automation helps in reducing the machine hours required for operations, which can be made possible only through robust software.

Key Highlights

- The automation of various industries has offered various benefits, such as effortless monitoring, waste reduction, and increased production speed. Automation offers customers improved quality with standardization and dependable products on time and at a much lower cost.
- Connecting industrial machinery and equipment and obtaining real-time data have played a key role in the adoption of SCADA, HMI, and PLC systems, software such as MES, APM, APC, PLM, and OTS, and control system software that offers visualization. These systems help in reducing the faults in the product, reducing downtime, scheduling maintenance, switching from a reactive state to a predictive state, and creating prescriptive stages for decision-making.
- The Industrial Internet of Things (IIoT) and Industry 4.0 are at the center of new technological approaches for the development, production, and management of the logistics chain, otherwise known as smart factory automation. These are dominating trends in the industrial sector, with machinery and devices being connected via the internet.
- However, the initial costs associated with the implementation of industrial automation solutions are high. Additionally, the costs involved in hiring and training employees who are capable of handling the solution add to the total cost, which can hinder market

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growth.

-The trends that existed in the pre-COVID manufacturing industry include growing adoption of Industry 4.0 throughout the world, increasing emphasis on industrial automation in manufacturing processes with increasing government support, the growing emphasis on regulatory compliance, increasing complexity and integration of supply chains, surging demand for software systems that reduce time and cost and improve overall equipment effectiveness (OEE) and the collapse of the convergence of MES and ERP layers and SCADA and MES layers. While the COVID-19 pandemic has not triggered Industry 5.0, it has brought about the adoption of Industry 4.0, which utilizes several smart manufacturing technologies. Digital workflows and automation are no longer goals; they are becoming necessary requirements. IoT devices have offered manufacturers a path toward preserving revenue streams during this pandemic.

Industrial Automation Software Market Trends

SCADA has a Significant Impact on the Market Growth

- The supervisory control and data acquisition (SCADA) software experienced rapid growth over the past decade. SCADA system helps the end-user industry employees to analyze the data and make crucial decisions from a remote location. It further assists in mitigating the issues with a quick response as it processes, distributes, and displays the data on the human-machine interface (HMI).
- SCADA systems usually function in close coordination with hardware and software components. The hardware collects and feeds data into the processing unit of a computer, which then processes it at varying time intervals. SCADA systems either record and log events into a folder on a hard disk or send them to a printer.
- SCADA systems play an important role in a number of industrial applications. Some of the industries that use SCADA in their daily operations include water and wastewater systems, electric generation, transmission and distribution systems and oil and gas systems. For instance, in the Oil and Gas industry, SCADA is used to monitor well and pumping sites along with distribution pumping pressure and pipeline flow.
- In February 2022, General Electric (GE) Digital announced the launch of its latest version of CIMPLICITY 2022 HMI/SCADA software. For applications of all sizes, the software can deliver fast response, reduced costs, improved security, and increased profitability. CIMPLICITY also provides options to deploy on-prem, in the cloud, or in a hybrid architecture to reduce infrastructure and maintenance costs.
- The labor wage is one of the largest expenses for any business. As per the US Bureau of Labor Statistics, labor costs for workers in the US rose by 1.3% for the third quarter of 2021, which was the largest hike in 20 years. Industrial automation solutions, such as SCADA, enables the reduction in required labor hours for the tasks, thereby reducing the associated labour costs.

Europe Market to Witness Significant Growth

- The robotics and automation industry is one of the most innovative in the German mechanical engineering sectors. German OEMs rank among the world's leading R&A companies. Human-robot collaboration (HRC) and machine vision (MV) technologies are considered the major strengths in a global hub that hosts robotics players from all market segments. Technological developments in the field of artificial intelligence, including machine learning and deep learning, will lead to further applications of conventional industrial robots and collaborative robots.
- Recently, SECO, a global provider of innovative embedded systems, Internet of Things (IoT), and Artificial Intelligence (AI) solutions, presented its expanded Human Machine Interface product portfolio at embedded world 2022 in Nuremberg, Germany. In addition to the company's wide-ranging FLEXY VISION family, the HMI product portfolio was expanded to include the modular

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Proven Concept (PCT) HMI series by Garz & Fricke with flush mount, rear mount, and panel mount installation options and an accompanying single board computer providing display intelligence and interfaces.

- The machine vision industry in Germany and Europe has been growing at a fast rate over the past decade. Beyond the automotive industry and the electrical and electronics industries (including semiconductors), other sectors - including the metal, food, and packaging, as well as non-manufacturing industries (e.g., intelligent traffic technology, medical diagnostic equipment, and surgical technologies) - are increasingly making use of machine vision technology.
- As per a recent report produced by the Manufacturing Technology Centre (MTC) and Loughborough University's Industrial Policy Research Centre (IPRC), speeding up the adoption of industrial automation and robotics in the United Kingdom could lead to significant improvements in the country's manufacturing productivity. A new national robotics research center is also being set up in the country to advance smart manufacturing by eliminating barriers and accelerating the widespread use of smart collaborative robotics technologies.
- Much EU-based research & innovation (R&I) programs have constantly supported the development of solutions and technologies that enable the European manufacturing sector to fully utilize digital opportunities. Many of the projects are financed by the Factories of the Future Public-Private Partnership as they cover areas such as digital automation, process optimization of manufacturing assets, simulation and analytics technologies, and ICT innovation for manufacturing SMEs.

Industrial Automation Software Industry Overview

The Industrial Automation Software Market is moderately competitive and consists of some influential players. The key players with a noticeable share in the market are concentrating on expanding their customer base across foreign countries. These businesses are leveraging strategic collaborative actions to improve their market percentage and enhance their profitability.

- February 2022 - Emerson announced the opening of a new integrated manufacturing facility at Mahindra World City, in Chennai, Tamil Nadu. The 145,000-square-foot facility will manufacture major products of the company's Automation Solutions business which provides industrial customers in India and across Asia with technologies to improve productivity, safety, and environmental sustainability.
- July 2021 - Rockwell Automation announced the acquisition of Plex Systems for USD 2.22 billion to expand its industrial cloud software offering. Plex Systems is a pure software-as-a-service, cloud-native smart manufacturing platform operating at scale.

Additional Benefits:

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

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