# North America Process Automation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

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**Report description:**

The North America Process Automation Market size is estimated at USD 39.52 billion in 2024, and is expected to reach USD 45.43 billion by 2029, growing at a CAGR of 2.83% during the forecast period (2024-2029).

The COVID-19 pandemic's impact on different industries in the United States is strongly affecting the uptake of process automation in the region. The impact of COVID-19 is quite significant on industries like energy, utilities, and resources. The oil supply chain has slowed because fewer oil and oil-derived products are being produced and used. The oil-producing regions of OPEC have called for a deep production cut of 1.5 million barrels per day to support sagging prices due to COVID-19. For instance, the overall price of West Texas Intermediate crude decreased by approximately 25% YTD. However, some of this price drop is attributed to a price war between the Saudi Kingdom and Russia.

Different baseline indicators demonstrate the impact of COVID-19 on differently sized businesses in Canada. For hours worked, SMEs are found to be hardest hit by the outbreak of the pandemic in Q1 of FY 2020. Large-scale firms were the least hit.

Key Highlights
-The automation industry in North America has been revolutionized by combining the digital and physical aspects of manufacturing. These changes are aimed at delivering optimum performance. Further, the focus on achieving zero waste production and shorter time to market has augmented the market's growth. The automation of manufacturing processes has offered various benefits, such as effortless monitoring, reduction of waste, and increased production speed. Automation offers customers improved quality, with standardized and dependable products, within a short span of 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, and software that offer visualization. These systems help in reducing the faults in the product, reducing

downtime, scheduling maintenance, and switching from being in the reactive state to the predictive and prescriptive stages for decision-making.
-The manufacturing sector is witnessing significant growth. In the United States, employment in the manufacturing sector declined over the past 25 years. The rising material costs, price reduction pressures, and increasing labor costs are the primary challenges faced by these industries. The fluctuating unit labor costs in the United States indicate an irregularity in productivity. This augmented the adoption of automation across the industrial sector, thereby reducing the costs associated with production.

North America Process Automation Market Trends

Oil and Gas is Expected to Grow Significantly

- Automation is a significant driver in the oil and gas industry. Digitization, automation, and new technologies give operators and technicians immediate access to critical performance, condition, and technical information. Oil and Gas companies in the studied region are increasingly adopting process automation, to enhance decision-making speeds, troubleshooting, and performance efficiency.
- The North American Oil and Gas companies often face challenges transitioning to more renewable sources. To meet the demand in diverse situations, energy companies need to focus on innovative technologies like process automation within their business models, to embrace innovation and increase efficiency.
- Modernizing internal processes with automation and better access to information about operations and maintenance will help the industry streamline production and distribution, and allow for a higher yield.
- There is surging demand for safety and reliability in the oil and gas industry's processes. The industry's supply chain creates a significant demand for automation, industry expertise, and an extensive partner network. Process automation helps oil and gas producers integrate information, control power, and provide safety solutions to respond to the dynamic global demand.
- Additionally, the upstream sector of the oil and gas industry involves several drilling activities that need to meet stringent government regulations and require intense planning, to cut down operational costs. Often, the industry deals with vast sets of spatial data, to make several decisions. Several process automation tools and analytical engines are employed in the sector, to harness the complete power of spatial data.
- With the fluctuation in crude oil price, several oil and gas companies are focusing on minimizing costs and maximizing efficiency throughout the distribution chain. To sustain in the rising competitive environment and decrease the retail margins, they need to optimize several processes in multiple sectors.

United States is Expected to Account for Major Market Share

- Fuelled by Industry 4.0, the United States continues to innovate and consolidate its position in the global market in the factory automation and industrial control systems industry. The embracing of smart technologies in the studied market has also positively impacted the national economy.
- Increased global manufacturing integration is raising the pressure for automation investment, as cost minimization with quality maximization looms ever more significantly as an operating paradigm for U.S. manufacturers.
- With cyber-attacks increasing in smart factories in the United States, there is growing concern about using Industrial Control Systems. The government has plans to curb the rise of such crimes. This is aligned with the growing trend of industrial control systems manufactured in the country for smart factories to avoid the risk of cybersecurity breaches. Companies like Panasonic North America offer complete smart manufacturing solutions, including ERP and numerous others.
- Innovations based on the technological intersection is noted in the United States. For instance, in September 2020, the Wichita

State University announced the launch of The Smart Factory@Wichita in collaboration with Deloitte, including a full-scale production line and hosting sponsors and experimental labs to expand the technological expertise.
- With investment roll-outs by the Biden government to revive the pandemic hit US economy, infrastructure, and the electronics industry are marked as the primary beneficiaries alongside the growth of small and medium-sized enterprises. The infrastructure and electronics industry are heavy users of the industrial control systems' hardware products and software solutions and are expected to have a direct positive effect.
- Technologies and terminologies such as process discovery, process optimization, process intelligence, and process orchestration are becoming a more significant part of the Robotic Process Automation (RPA). There is an ongoing trend of increasing a closer relationship between business process management (BPM) and RPA in the future.
- In addition, with reviving crude oil prices in the global market, investments into multiple oil and gas infrastructure projects are on the rise, especially in North America, Europe, and the Middle East regions. These projects are expected to spearhead the demand for process automation solutions worldwide.

North America Process Automation Industry Overview

The barriers to exit are non-supportive, considering the high-cost equipment needed for producing these systems. Many companies operating in the market eliminate the competition by acquisitions and strategic mergers or new smart initiatives and hence the market is expected to become more competitive despite of consolidation during the forecast period. As of October 2020, Emerson announced the acquisition of the Progea Group. Also, collaboration with internet giants is increasingly visible on account of Industry 4.0. As of April 2021, Siemens partnered with Google Cloud with intentions to integrate Google Cloud's data cloud and artificial intelligence/machine learning (AI/ML) technologies with its factory automation solutions.

- April 2021 - Siemens launched a new servo motor. The Simotics S-1FS2 comes with a stainless-steel casing, IP67/IP69 protection, and high-resolution 22-bit absolute multiturn encoders, catering to the pharmaceutical and food industries.
- March 2021 - The company unveiled enhancements to its CIMPLICITY and Tracker software that provide critical decision support for operators to make them more efficient. CIMPLICITY is a solution for industrial companies building remote operations centers including power and water utilities with multiple locations. New releases deliver increased integration with Proficy Operations Hub and Proficy Historian to provide centralized web-based visualization, control, and data in context.

Additional Benefits:

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

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