

## **Europe Process Automation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Europe Process Automation Market is expected to register a CAGR of 6.67% during the forecast period.

#### Key Highlights

- The IoT demand trend is expected to shift toward industrial space from consumer demand over the near future, primarily driven by various Industry 4.0 applications. Countries like the United Kingdom are on the verge of the industrial revolution, as data is being used on a large scale for production while integrating it with various manufacturing systems throughout the supply chain.
- European nations have been at the forefront of adopting industrial automation solutions and have been under the government's constant support. For instance, the UK government revealed that the government has increased its investment in R&D from GBP 15 billion to GBP 20 billion per year from 2020/21 to 2024/25. Smart manufacturing and the Industrial Internet of Things (IIoT) will be built upon the work that automation has already forged over these years. Focusing on the possibilities that the automation solutions will enable will present the opportunity for multiple industries to push the boundaries of technological innovation, which is crucial for the UK economy in a post-Brexit phase. Automation solutions are expected to revolutionize the process industries.
- Further, The European Union plans to allocate nearly half a billion euros to cutting-edge digital technologies, following the latest selection of proposals under the Horizon Europe Programme. This initiative aims to strengthen collaborative research and development across the Union and beyond. The funding will drive progress in artificial intelligence, big data, robotics, extended reality, quantum technologies, photonics, sensors, next-generation internet, and two-dimensional materials. These critical technologies are essential for enhancing Europe's strategic autonomy and enabling the transition to a digital, sustainable, and inclusive future.
- Furthermore, process industries, such as chemical and petrochemical, paper and pulp, water and wastewater treatment, energy and utilities, oil and gas, pharmaceutical, food, and beverages, are expected to fuel growth. In January 2025, SICK and Endress+Hauser have formalized their strategic partnership in process automation. SICK's state-of-the-art gas analysis and flow

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measurement technologies are now integrated into Endress+Hauser's extensive instrumentation portfolio. As part of this collaboration, approximately 800 sales and service employees from SICK will transition to Endress+Hauser across 42 countries. This partnership enables customers to access an expanded product portfolio from a single provider while benefiting from enhanced expertise in gas measurement technology.

- Industrial system architects, integrators, and machine builders have leveraged connected computing advances to aid manufacturing facilities function more efficiently. The rising need for real-time intelligence, better control of operations, scheduling, and increasing market penetration of big data analytics in the manufacturing industry is expected to generate demand for advanced process automation in the near future. Big data analytics has been used to refine complicated processes and manage supply chains.
- Moreover, big data analytics allows an enterprise to use factory automation to shift from reactionary practices to predictive ones. This change targets to improve the efficiency of the process and performance of the product.

## Europe Process Automation Market Trends

### Pharmaceutical Industry is Expected to Hold Significant Market Share

- The growing pharmaceutical industry in the region significantly contributes to the market growth rate. For instance, As of 2023, Germany led the European pharmaceutical market, generating nearly 69 billion euros in revenue. France and Italy followed, with revenues of 46.5 billion euros and 40.7 billion euros, respectively. Spain and Poland completed the top five rankings.
- Automation is embedded in primary aspects such as Active pharmaceutical ingredients (API) and other secondary aspects, including packaging and distribution. Digital transformation provides pharmaceutical companies in the region with new operational efficiency, quality, process automation, and employee productivity.
- Intelligent automation (IA) will act as a pillar of artificial intelligence. Organizations like hospital networks or warehouses typically use it sparingly to build work processes or use learning abilities to anticipate customer needs. The potential benefits of IA are becoming increasingly important to pharmaceutical executives.
- Technological advancements in automation and robotics are transforming the pharmaceutical industry by enhancing the speed and accuracy of processes such as filling, packaging, and inspection. Implementing automation enables pharmaceutical companies to reduce operational costs while adhering to stringent regulatory and compliance requirements. As the pharmaceutical sector continues to evolve, the demand for improved efficiency, precision, and regulatory compliance grows. Process automation in pharmaceutical manufacturing has become a critical strategy, driving operational improvements, ensuring product quality, and accelerating time-to-market. Companies leveraging process automation not only optimize their production processes but also maintain compliance with the industry's rigorous standards, positioning themselves for success in pharmaceutical manufacturing.
- Further, the growing collaborations in the region are set to bolster the market growth rate. For instance, in September 2024, Merck KGaA, Darmstadt, Germany, and Siemens, both leaders in the technology industry, have strengthened their partnership to advance smart manufacturing. Cedrik Neike, CEO of Digital Industries and Member of the Managing Board at Siemens AG, and Kai Beckmann, CEO of Electronics and Member of the Executive Board at Merck KGaA, signed a Memorandum of Understanding (MoU) to enhance collaboration in Smartfacturing. The MoU establishes Siemens as the preferred global supplier and strategic partner for Smartfacturing technologies, enabling transformative projects across Merck KGaA's three business sectors.

### United Kingdom Accounts for the Largest Market Share

- Robotic process automation delivers significant value to the manufacturing sector. In addition to ensuring accurate and

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consistent outputs, it optimizes production line efficiency. By programming machinery for continuous operation without interruptions, manufacturers can achieve round-the-clock production, resulting in a proportional increase in productivity.

- Robotic processes are managed through software that can be reprogrammed to accommodate design and process modifications as needed. This capability reduces the reliance on staff retraining and allows a single production line to produce a variety of products. This flexibility is particularly beneficial for businesses that frequently update their product offerings. Previously, introducing new product iterations required investing in new machinery infrastructure, a process that was both expensive and time-consuming.

- In 2023, the UK achieved a record high of 3,830 industrial robot installations, representing a 51% increase compared to the previous year. The food and beverage sector expanded its installations by 59%, reaching 555 units, while the metal industry experienced a 20% growth, totaling 324 units.

- "The UK manufacturing sector significantly increased its investments in robotics during 2023," stated the President of the International Federation of Robotics. "A major tax incentive for plant and machinery investments, known as the 'super deduction,' expired after the first quarter of 2023 and has been credited with driving this growth."

- Additionally, technologies and terminologies such as process discovery, process optimization, process intelligence, and process orchestration are becoming a more significant part of Robotic Process Automation (RPA). There is an ongoing trend of increasing a closer relationship between business process management (BPM) and RPA in the future.

- Further, different industrial automation systems, such as SCADA, PLCs, and MES on a single physical server, can be easily accessed at different locations on the plant floor using virtual machines. It has been adopted in the country to reduce the overall cost for servers and increase the flexibility in adopting industrial automation systems and software in the process and discrete industries.

## Europe Process Automation Industry Overview

The European Process Automation Market is fragmented by nature with several new entrants and dominant players. The companies keep on innovating and entering into strategic partnerships to retain their market share. Some of the major players are ABB Limited?, Siemens AG?, Schneider Electric SE, General Electric Co., and Mitsubishi Electric Corporation.

### Additional Benefits:

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

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