Germany FA And ICS - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Germany FA And ICS Market size is estimated at USD 16.28 billion in 2025, and is expected to reach USD 22.61 billion by 2030, at a CAGR of 6.78% during the forecast period (2025-2030).

Key Highlights
- The manufacturing sector's growing proliferation of Industrial 4.0, IIoT, AI, etc., to drive productivity and operational efficiency are among the major factors supporting Germany's studied market's growth. Furthermore, rising labor costs and a labor shortage are also among the crucial factors driving the country's adoption of factory automation and industrial control solutions.
- Factory automation and industrial control refer to using control systems such as robotics, computers, information technology, and solutions such as IIoT, AI, etc., to handle various industrial operations, primarily to reduce human effort and drive operational efficiency and productivity.
- Germany is among the major industrialized economies in the European region. According to the Organisation for Economic Co-operation and Development(OECD), Germany invests 2.88 percent of its GDP in manufacturing innovation, well above the OECD average of 2.4 percent. Over the last few years, the German automotive industry has dramatically increased its global position in car production. Furthermore, the manufacturing sector's sustainability is projected to be a significant driver for the market under consideration.
- Cobots, or collaborative robots, are becoming more popular among automakers and suppliers. These technologies are typically smaller, have greater dexterity, and can be used safely alongside human operators. For instance, BMW relies on cobots to improve the safety of workers within its plat and for the quality of goods and components produced. Other companies following the same include Nissan and Ford - specifically in their Germany plant.
- With increased investments in factory automation in the country, the end-users are also focusing on adopting advanced automation and industrial control solutions such as high-resolution Vision sensors for multiple inspections with a single image to

generate rich data for the process and quality. To address the market requirements, vendors in the region are introducing an updated version of the sensor, introducing innovative products that are built on 3D technological principles. For instance, Sensopart recently introduced a 5-megapixel sensor Visor V50 with an integrated lens and lighting for flexible detection of objects at fluctuating distances.
- Moreover, recent controller vulnerabilities that attackers have exploited to disrupt operations are rising. This challenges the implementation of ICS as to secure ICS networks; there is the usage of different communication protocols. Also, the higher installation cost involved further restraints the studied market's growth, especially in the small and medium industry segments.

Germany FA And ICS Market Trends

Growing Prominence of Automation Technologies to Drive the Growth

- Germany is among the leading countries in terms of industrialization rate in European and global contexts. Automobiles, machine building, electrical & electronics engineering, chemicals, and food processing are among the major industrial sectors of the country.
- Considering the prominence of the industrial sector in the country's GDP, the public and private sectors are taking initiatives such as framing supportive regulations, investing in advanced industrial and process technologies, etc., which in turn is driving the adoption of industrial automation and control solutions in the country. Adopting solutions such as integrated motor control, automation, and energy management are also increasing to help reduce costs while increasing production.
- The increasing investment in industrial robots is also creating a favorable scenario for the growth of the studied market in the country. For instance, according to Statistisches Bundesamt, in 2023, around 49 percent of German manufacturing companies with 250 or more employees used industrial robots. This was a increase compared to 47 percent in 2022.
- Further, higher labor cost is also among the significant factors driving the adoption of factory automation and industrial control solutions in Germany. According to Statistisches Bundesamt, in the first quarter of 2024, labor costs per hour worked in Germany were up by a seasonally and calendar-adjusted 2.5 percent, compared with the fourth quarter of 2023.
- Germany is also one of the world's largest producers and exporters of chemicals. Automating manufacturing processes is gaining high traction in the country. Furthermore, it is not only a significant consumer of automation equipment but is also considered a major manufacturer of automation equipment across Europe. Some significant players in automation and control equipment are Siemens, Schneider Electric, and KUKA, based out of Germany, thus driving a high flow of investments toward R&D activities and increased adoption of automation capabilities.
- 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. At the same time, the government attempts to adapt the grid to the new demands being placed upon it. The measures by the four national grid operators to boost power transmission capacity sufficiently add up to a cost of EUR 50 billion (USD 52.6 billion). This is likely to escalate the usage of PLC to accumulate data and further take successive measures, thereby fueling the market studied.

Automotive and Transportation to Hold a Significant Market Share

- The growing adoption of automation in manufacturing industries and the involvement of digitization and AI are primary factors driving industrial robot demand in the country's automotive sector. Large industrial robots with a higher payload and extended arms capabilities in automotive manufacturing handle spot welding on heavy body panels. Smaller robots weld lighter parts such as mounts and brackets. Robotic tungsten inert gas and metal inert gas welders can position the torch in precisely the same orientation for every cycle. Also, preserving high welding standards in every fabrication is now doable and feasible due to the

repeatable arc and speed gap.
- With the automobile industry shifting towards electric vehicles, the country is expected to continue to maintain its leading position. Industry 4.0 and fully autonomous manufacturing trends will likely shape the studied market's growth in the country. For instance, since 2000, KUKA, a leading German robot provider of orange robots, has become a significant supplier to the German automotive industry, supplying robots to automotive giants including Audi, Daimler, and BMW.
- Furthermore, the growing demand for automobiles in the country encourages manufacturers to adopt advanced automation and industrial control solutions to reduce production time and human-centric errors and enhance operational efficiency. According to KBA, the Federal Motor Transport Authority, passenger car registration in Germany has increased from 45.8 million in 2017 to 49.1 million in 2024.
- In June 2023, Ford Motor Co. invested USD 2 billion to retool its Cologne, Germany, factory to produce 250,000 electric vehicles yearly. The factory is designed to be highly efficient with a new production line, battery assembly capacity, and state-of-the-art automation. The Cologne EV plant will be vital to achieving the automaker's goal of producing 2 million EVs annually by 2026. Overall, the market is expected to grow potentially during the forecast period.

Germany FA And ICS Industry Overview

The market is semi- fragmented due to the presence of various factory automation and industrial control providers. However, vendors consistently focus on product development to enhance their visibility and global presence. The companies are also undergoing strategic partnerships and acquisitions to gain market traction and increase market share. Some major market players include ABB Ltd., Rockwell Automation, Honeywell International Inc., and Schneider Electric SE.

The factory automation and industrial controls market in Germany is evolving rapidly, driven by technological advancements such as AI, IoT, and robotics. However, challenges related to competitiveness and market reliance on specific sectors necessitate strategic responses from industry leaders to foster growth and innovation moving forward.

Additional Benefits:

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

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