

Industrial Tablet PC - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Industrial Tablet PC Market size is estimated at USD 1.12 billion in 2025, and is expected to reach USD 1.52 billion by 2030, at a CAGR of 6.38% during the forecast period (2025-2030).

As the supply chain is increasingly digitized, manufacturers incorporate automation and digitization to add value across their supply chains. In a survey of manufacturers done by the MAPI Foundation, it was found that pressures from the supply chain are driving the adoption of automation and smart technology in the manufacturing industry. This is so that the real benefits of automation and digitization can be seen and passed along the value chain.

Key Highlights

- Streamlining operations through a single access point is also essential for improving timely decision-making, speed, and accuracy in industrial manufacturing, enhancing factory production control, increasing operational efficiency, and optimizing computing performance for production data analysis. Developing economies, such as India, Brazil, and China, are focusing on the manufacturing sector to increase industrial output to drive forward and support their economies. For example, China wants to move up the manufacturing value chain. However, labor costs in Chinese cities have gone up in the last few years, so low-cost offshoring is no longer a financially viable option there without a lot of investment in automation.
- Device manufacturers have provided a wide range of products across different pricing ranges based on the feature set included in the final product. For instance, the manufacturers may opt for the display to be a TFT or IPS instead of an OLED one. Also, devices can be designed with limited color support. Furthermore, industrial instruments are well adopted if they offer modularity functions embedded within the product. It is one of the sought-after features that industries look for, along with device compatibility within existing systems. The transition toward a connected M2M communication and network industry is also expected to drive the industry to adopt mobile devices in its processes. It is expected to positively impact the industrial tablet PC

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

market's demand.

- The market has been complemented by technological advancements in communication and networking, such as Bluetooth, Wi-Fi, and the emerging 5G communication that enables multiple connections, enhanced Wi-Fi and multiple device connectivity, and data transfer speed, all of which have been crucial in promoting the transition of the industry to a smart and connected one. The companies also sell these devices for use in an industrial setting (like a factory), outdoors, and in other industrial settings (like oil and gas, logistics, etc.) in the field.
- Due to the spread of COVID-19, the industrial tablet PC had to rethink its usual ways of making things. This has pushed digital transformation and industry 4.0 practices across the production lines.
- The pandemic complicated the situation of automation adoption in various sectors. It has changed the standard operating procedure by bringing in unique challenges of social distancing and contactless operation. Organizations were forced to limit their workforce and deal with the increasing demand. Industrial tablets have been easing the process of monitoring the product and keeping track of quality control.

Industrial Tablet PC Market Trends

Transport & Logistics Holds Significant Share in Industrial Tablet PC Market

- The transport and logistics industry is observing an exponential growth of omnichannel shopping, and the high demand for faster product deliveries is redefining the supply chain distribution of consumer goods. There is an unprecedented change in shopping across multiple platforms, such as desktops and mobile devices, and stores have created the need for smarter warehouse management to serve consumers.
- With high-performance, rugged handheld tablet PCs, transportation and logistics tasks can be accomplished efficiently, quickly, and securely. Rugged tablets guarantee real-time communication and feedback, proper resource utilization, and staff management. The e-commerce industry has been a crucial beneficiary of industrial tablet PCs. For instance, India had the third-largest online shopper base of 150 million in FY last year, after China and the United States, as per the Indian Brand Equity Foundation report. Such developments in the e-commerce segment are expected to increase the demand for industrial tablets for warehouse storage management over the forecast period.
- Passenger tracking and monitoring are crucial in the transportation industry and are monitored through rugged tablet PCs. Passenger tracking helps to understand the number of passengers traveling on a particular route daily. As a result, fleet managers can more easily allocate the appropriate number of motor vehicles that can best serve a specific purpose.
- In transportation and supply chain applications, rugged display tablets are used for multiple use cases like RFID and barcode scanning, credit card processing, management of retaining inventory, storage, exchange, line busting, mPOS, promotion tracking, NFC transactions, customer feedback gathering, and so on. The growing number of warehouses and increasing investment in advanced logistic centers expand the studied market's scope.

The COVID-19 pandemic had also hampered the production of rugged displays, a significant component of industrial tablets. The lockdown imposed in several countries to curb the spread of the COVID-19 virus caused disruptions in the global supply chain of the parts and components used in these devices. The halting of production and disorder in the supply chain have weakened industrial output growth and decreased activities across significant manufacturing hubs.

North America Holds a Dominant Position in the Market

- North America is one of the leading regions of the global transportation and logistics industry. Moreover, the growing

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

investments in the energy sector are also expected to drive the North American market. The third-largest energy industry in the United States is attracting many investments.

- North American end users' readiness to adopt new technology has positioned the region to hold a significant position in the global industrial tablet PC market over the forecast period, owing to the new government initiative, especially in the United States, in end-user industries such as defence, aerospace, health care, and automotive, among others.

- The region is also witnessing a demand for agriculture and farming that drives the market. For instance, according to the U.S. Department of Agriculture, the number of farms in the United States accounted for 2,012,050 last year, compared to 2,023,400 in 2019. With the decrease in farm numbers, the size of the existing farms is increasing. As the land grows, irrigation and fertilization demand digitization for farmers as the region's labor cost is always high, thus driving the use of GPS-equipped industrial-grade rugged tablets for agriculture and farming.

- Further, according to the U.S. Census Bureau, from January to March this year, U.S. retail e-commerce sales amounted to almost USD 250 billion, marking a 2.4% increase compared to the previous quarter. The rapidly evolving retail market pushes distribution centers to find and use innovative, flexible, and automated approaches to e-commerce order fulfillment. The growing demand from the e-commerce sector is fueling demand for the industrial tablet PC market in the United States.

Industrial Tablet PC Industry Overview

The industrial tablet PC market is fragmented due to the presence of international, regional, and local vendors. The highly competitive market is anticipated to grow further based on products, technological innovations, and the growing number of M&A activities. Furthermore, the new players venturing into the market would face challenges competing with the existing players based on quality, features, functionalities, and services.

In September 2022, Samsung Electronics announced the launch of its Galaxy XCover6 Pro smartphone and Galaxy Tab Active4 Pro tablet. These are mobile devices that are powerful enough to support business needs. Both devices deliver enhanced mobility with 5G connectivity, strong performance, end-to-end security, a replaceable battery, and ruggedized durability. These devices could help frontline and field workers work from anywhere there's a connection, whether on their feet, in trucks, or at stores.

In January 2022, Getac announced the launch of its ZX10 fully rugged tablet, a versatile new 10-inch device built around the Android 11 operating system (OS). It is suitable for various industries, including public safety, utilities, energy, transport and logistics, manufacturing, automotive, and defense.

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

4 MARKET INSIGHTS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.1 Market Overview
- 4.2 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.2.1 Bargaining Power of Buyers
 - 4.2.2 Bargaining Power of Suppliers
 - 4.2.3 Threat of New Entrants
 - 4.2.4 Threat of Substitute Products
 - 4.2.5 Intensity of Competitive Rivalry
- 4.3 Industry Value Chain Analysis
- 4.4 Assessment of Impact of COVID-19 on the Industry
- 4.5 Technology Snapshot

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increased Demand for Rugged Industrial Handheld Computing Devices in Manufacturing Sector
 - 5.1.2 Product Innovation and Design Robustness
- 5.2 Market Challenges
 - 5.2.1 High Initial Investments

6 MARKET SEGMENTATION

- 6.1 By Type
 - 6.1.1 Fully Rugged
 - 6.1.2 Semi-Rugged
 - 6.1.3 Ultra Rugged
- 6.2 By Operating System
 - 6.2.1 Windows
 - 6.2.2 Android
- 6.3 By End-User Industry
 - 6.3.1 Manufacturing
 - 6.3.2 Energy and Power
 - 6.3.3 Oil and Gas
 - 6.3.4 Transportation and Logistics
 - 6.3.5 Automotive
 - 6.3.6 Agriculture and Farming
 - 6.3.7 Other End-User Industries
- 6.4 By Geography
 - 6.4.1 North America
 - 6.4.2 Europe
 - 6.4.3 Asia Pacific
 - 6.4.4 Latin America
 - 6.4.5 Middle East and Africa

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 Panasonic Corporation
 - 7.1.2 Advantech Corporation
 - 7.1.3 Getac Technology Corporation
 - 7.1.4 Samsung Electronics Co. Ltd.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 7.1.5 Siemens AG
- 7.1.6 ARBOR Technology Co. Ltd
- 7.1.7 Zebra Technologies Corp
- 7.1.8 NEXCOM International Co. Ltd.
- 7.1.9 Mobile Demand, LLC
- 7.1.10 AAEON Technology Inc.
- 7.1.11 Bartec GmbH
- 7.1.12 Dell Technologies
- 7.1.13 Durabook (Twinhead International)
- 7.1.14 RuggON Corporation
- 7.1.15 Winmate Inc.
- 7.1.16 Mobile Worxs

8 INVESTMENT ANALYSIS

9 FUTURE OUTLOOK

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Industrial Tablet PC - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-28
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com