

Mexico Factory Automation And ICS - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 155 pages | Mordor Intelligence

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Report description:

The Mexico Factory Automation And ICS Market size is estimated at USD 5.90 billion in 2025, and is expected to reach USD 8.58 billion by 2030, at a CAGR of 7.8% during the forecast period (2025-2030).

Key Highlights

- Technological advancements, notably the Internet of Things (IoT), artificial intelligence (AI), and robotics, are propelling the adoption of automation solutions. These technologies boost operational efficiency, enhance data collection, and enable real-time monitoring, making them appealing to Mexican manufacturers aiming to modernize. The rising use of IoT and machine-to-machine technologies in Mexico is expected to bolster demand in the studied market.
- Mexico's strategic positioning and its involvement in international trade agreements, like the United States-Mexico-Canada Agreement (USMCA), have woven it into global supply chains. This integration demands sophisticated automation solutions to navigate intricate supply chain dynamics, ensuring prompt production and delivery.
- With intensifying global market competition, the appetite for high-quality products has escalated. Automation and control systems empower manufacturers to attain heightened precision and consistency, aligning with rigorous quality standards and customer demands.
- Moreover, the Mexican government is championing manufacturing and technological innovation through various initiatives. These programs, designed to boost competitiveness and attract foreign direct investment (FDI), frequently emphasize technology adoption, fueling the market for factory automation and industrial controls.
- Safety remains a top priority in manufacturing. Automation solutions can alleviate risks by minimizing human involvement in dangerous tasks and offering real-time operational monitoring. This emphasis on safety propels the uptake of industrial controls and automation technologies.
- Nonetheless, the steep initial costs of automation technologies present a significant hurdle, particularly for small and

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medium-sized enterprises (SMEs). Operating on tight budgets, these firms often struggle to invest in advanced machinery, which can dissuade them from embracing automation.

- Additionally, a notable concern is the shortage of a skilled workforce adept at managing automated systems. While Mexico boasts a burgeoning engineering talent pool, there's a pronounced skills gap in niche areas like robotics, programming, and system integration. This deficiency can hinder swift automation adoption and inflate operational costs, as firms might need to invest in training or recruit foreign specialists.

- Despite the robust growth of Mexico's automotive sector, fueled by foreign direct investment, trade agreements like the USMCA, and a proficient labor force, macroeconomic challenges such as inflation and volatile exchange rates can sway production costs and consumer demand. For instance, a dip in inflation might lower raw material prices, boosting profit margins for manufacturers. Yet, with its closeness to the US market and competitive labor costs, Mexico stands out as a prime manufacturing hub for leading automotive firms.

Mexico Factory Automation & ICS Market Trends

Machine Vision Field Devices Product Segment is Expected to Hold Significant Market Share

- Machine vision refers to the technologies and procedures that enable automatic inspection and analysis through imaging. These technologies are commonly applied in automated inspections, process controls, and robot guidance, especially in industrial environments. By adopting machine vision solutions, businesses in the country are markedly boosting the efficiency and value of their robotic systems. Much like a human arm, these robots are equipped with a camera at their "hand," acting as the "eyes" to guide them in executing their tasks.

- The growth of machine vision devices is primarily driven by the manufacturing industry's demand for improved product inspection and quality control, alongside a rising need for advanced collaborative robots in manufacturing and warehousing. Additionally, automation and machine vision technologies lead to heightened operational efficiency, increased productivity, reduced production costs, and enhanced worker capabilities.

- As machine vision technologies advance, becoming more compact and efficient, their applications are expanding into new automation sectors. Notable areas of growth include autonomous vehicles, advanced inspection systems, and bin picking in warehouses. Manufacturers in the country highlight several advantages of integrating machine vision into their workflows, such as improved speed, consistency, and the ability to run production lines longer, all contributing to heightened productivity.

- Implementing these technologies not only boosts operational efficiency but also sharpens human critical thinking, allowing individuals to focus on skills that add significant business value. With a labor shortage anticipated to last at least two more years and possibly worsen before any improvement, the urgency for companies to adopt technology becomes paramount. This adoption is essential not just for maintaining operations but also for meeting customer expectations. Beyond merely establishing smart factories, organizations can progress by acknowledging the changing landscape of manufacturing roles and crafting strategies for the adoption, training, reskilling, and enhancement of these roles.

- The surge in industrial automation and the growing embrace of the Internet of Things (IoT) in Mexico are key drivers fueling the rise of machine vision devices. By integrating IoT with machine vision cameras, users can achieve real-time connectivity, optimize processes to eliminate waste, enhance flexibility, and notably reduce both time-to-market and inventory levels. This synergy between IoT and machine vision devices is expected to bring substantial cost savings and heightened efficiency to manufacturing operations.

- The Mexican manufacturing landscape has seen robust growth, especially in sectors like automotive, aerospace, electronics, and pharmaceuticals. For example, data from the National Institute of Statistics and Geography (INEGI) indicates that revenue from electronic component manufacturing in Mexico is set to reach around USD 1.3 billion by 2024, up from USD 1.1 billion in 2022. As these companies broaden their production horizons, there's a marked shift towards automation and industrial controls, aiming to streamline operations, cut costs, and elevate quality.

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Automotive Segment to Hold Significant Market Growth

- The increasing automotive production in Mexico is anticipated to offer lucrative opportunities for the growth of the studied market. For instance, according to the International Organization of Motor Vehicle Manufacturers (OICA), about 3.1 million commercial vehicles were produced in Mexico throughout 2023, up from around 2.85 million units produced during the previous year.
- The smart factory concept provides the automotive sector in the country with the ability to respond more swiftly to market demands, improve supply chain efficiency, minimize manufacturing downtimes, and boost overall productivity. As a key industry, the automotive sector is characterized by its extensive use of automated manufacturing systems.
- Consequently, the production facilities of numerous automotive manufacturers are equipped with automation technologies to ensure precision and operational efficiency. Additionally, the growing shift from traditional vehicles to electric vehicles (EVs) is anticipated to increase demand within the automotive industry further.
- Mexico is solidifying its position as a pivotal player in the global automotive manufacturing landscape. With its skilled workforce, advantageous geographic location, and well-established supply chain infrastructure, Mexico draws record investments from global car manufacturers. This momentum is poised to intensify as Mexico emerges as a hub for producing components for electric vehicles (EVs) and autonomous vehicles (AVs), aligning with the worldwide pivot towards sustainable transportation.
- Furthermore, Mexico represents a substantial market for American passenger vehicles, light vehicles, trucks, automotive components, supplies, and technologies essential for electric vehicles, which also act as a major growth driver for the studied market. According to ITA, the automotive industry is one of the most vital sectors in Mexico, accounting for 3.6% of the country's Gross Domestic Product (GDP) and 18% of the manufacturing GDP.

Mexico Factory Automation & ICS Industry Overview

The Mexico factory automation and industrial controls market is a moderately fragmented market with the presence of several prominent players like Rockwell Automation Inc., Honeywell International Inc., ABB Ltd., Emerson Electric Co., Omron Corporation, Mitsubishi Electric Corporation, Siemens AG, etc. These companies are striving to gain a competitive advantage by constantly developing their product portfolios and expertise. The level of market penetration is relatively high, with tight control on distribution. For instance, ABB is a significant player in the market in end-user industries like electric power generation and also has a significant presence in oil & gas. Honeywell also has a large installed base of process automation systems.

The market players are launching various innovative products that cater to consumers' evolving requirements. Further, the market has been registering significant collaborations and partnerships. Expansions and acquisitions among the market players to expand their presence in addressing the increasing demand for factory automation and industrial controls would fuel future market growth.

Additional Benefits:

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

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