North America Smart Manufacturing - 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 North America Smart Manufacturing Market size is estimated at USD 62.21 billion in 2025, and is expected to reach USD 85.72 billion by 2030, at a CAGR of 6.62% during the forecast period (2025-2030).

The growing need for automation to attain efficiency and quality, the demand for adherence and government backing for digitization, and the proliferation of the IoT are some of the main driving factors influencing the market growth.

Key Highlights
- North American manufacturers across every industry are creating the development foundation by rapidly improving their level of automation. While competing with global manufacturing hubs like Japan and China, North America has strived to create and adopt robotic and automation technologies. Therefore, to save energy and to gain cost-benefit, the trend of factory automation and industrial control systems is attaining traction in the region.
- The application of big data analytics in smart manufacturing aims to refine complicated processes, manage supply chains, and support new business models, like mass customization and product-as-a-service, which can be made possible by smart manufacturing apart from the traditional operational models like on-demand. Besides, big data analytics allows an enterprise to use smart manufacturing to shift from reactionary practices to predictive ones. This change targets improving the efficiency of the process and product performance, which in turn witnessed significant adoption in the region.
- However, The high costs of automated systems are concerned with effective and robust hardware and efficient software. Automation equipment requires high capital investment to invest in the smart factory (an automated system can cost millions of dollars to install, design, and fabricate). Also, the need for maintenance of automated machines is more than a manual system (even flexible automation is less flexible than humans, the most versatile machines of all). In addition to this, a series of significant cyber-attacks on manufacturing companies has highlighted the extreme and growing risks in the sector. The

dependence on process control and systems, combined with the convergence of IT and operating technologies systems, has increasingly exposed manufacturing firms to cyber attacks.
- The regional automotive sector has always led the way in implementing robotics in its manufacturing processes. Other industry manufacturers, like John Deere, are also making significant investments to integrate automated technology into their products and processes. The regional manufacturing industry still needs to utilize these benefits fully. Hence, the region's automation adoption and product innovation scope is high.

North America Smart Manufacturing Market Trends

Robotics is Expected to Witness Significant Growth

- Robots have transformed manufacturing, making moving heavy objects and performing delicate tasks easier through automation. There is a significant increase in the market, and sales for industrial and service robots are expected more over the forecasted period. Thus, it will lead to driving the need for smart manufacturing.
- According to the IFR, the number one adopter of robotics solutions in the region is the automotive industry, and companies based in the US, Canada, and Mexico installed 20,391 industrial robots in 2022, which was up by 30 percent compared to 2021. Notably, North America has evolved as the second largest operational stock for industrial robots in the world after China.
- Furthermore, as per the International Federation of Robotics (IFR), the North American robotics market observed strong growth, with total installations in manufacturing growing by 12 percent and reaching 41,624 units in 2022. In addition, according to the International Federation of Robotics (IFR), the United States is the world's second-largest production volume of cars and light vehicles, following China.
- Moreover, major manufacturers have been teaming up to provide significant solutions along with enhancing their consumer base. For instance, in March 2022, Plus One Robotics, a leading manufacturer of 3D and artificial intelligence (AI)-powered vision software, announced a partnership with Tompkins Robotics, a global leader focused on robotic automation of distribution and fulfillment operations. The two companies teamed up to offer an automated picking solution combining Plus One Robotics 3D and artificial intelligence (AI) software with the Tompkins Robotics tSort system.

United States is Expected to Grow Significantly

- The United States is on the boundary of the fourth industrial revolution, where data is used on a big scale for production while integrating the data with different manufacturing systems throughout the supply chain. The country is also one of the significant automotive markets in the world and has been home to about 13 major auto manufacturers. Moreover, automotive manufacturing is one of the largest revenue generators for the US in the manufacturing sector.
- In addition to this, the country is home to various enterprises adopting automation to optimize operations. For instance, Schneider Electric announced the launch of the first Smart Factory in the United States to demonstrate in real-time how EcoStruxure architecture and related suite of offerings can help enhance operational efficiency and reduce customer costs.
- The US oil and gas industry has been a basic demand driver for programmable logic controller (PLC) systems for automation tasks. Automation has enabled the country's high oil and gas production and has also been responsible for the smooth distribution of oil products.
- According to BEA (The Bureau of Economic Analysis), in 2022, the automobile industry in the United States sold around 13.75 million light vehicle units, which includes retail sales of about 2.9 million passenger cars and about 10.9 million light trucks, which is expected to grow more in future, and thus being a driving factor for the market in the country.
- Also, the formation of the Advanced Manufacturing Partnership has been an initiative undertaken for making the industry and

the federal government invest in upcoming technologies, which has substantially aided the country in gaining a competitive edge in the global economy. The National Network for Manufacturing Innovation incorporates developing regional hubs, which will develop advanced manufacturing technologies for implementing innovative products in the sector.

North America Smart Manufacturing Industry Overview

The North American smart manufacturing market is semi-consolidated and has several major players. The major players with prominent shares in the market are focusing on expanding their customer base across foreign countries. The companies leverage strategic collaborative initiatives to increase their market share and profitability.

In June 2023, Emerson announced that it enhanced its DeltaV Distributed Control System with the addition of their NextGen Smart Firewall for better network security as manufacturing and plant connectivity continue to grow. The company has recently released its new NextGen Smart Firewall for enhancing the DeltaV system and enhance its security. The firewall is built with a purpose for the industrial manufacturing industry and fits into most manufacturing processes. The objective of the firewall is to aid manufacturers in surging cyber security and secure plant networks without adding complexity to operations teams, who are often already overburdened.

In November 2022, Rockwell Automation, Inc. announced that it delivered an intelligent edge management and orchestration platform with an edge application ecosystem - based on zero trust security and open industry standards - accelerating digital transformation for industrial customers.

Additional Benefits:

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

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