

## **Factory Automation And Industrial Controls - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-09-01 | 150 pages | Mordor Intelligence

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### **Report description:**

Factory Automation And Industrial Controls Market Analysis

The factory automation and industrial controls market size reached USD 311.90 billion in 2025 and is forecast to advance to USD 485.80 billion by 2030, translating into a 9.30% CAGR. Momentum builds as manufacturers confront talent shortages, stringent energy-efficiency rules, and the imperative to shorten supply chains. Rising labor costs encourage companies to install intelligent robotics and vision-enabled inspection cells, while energy-oriented directives in North America and the EU reward investments in high-efficiency drives and smart metering. Digital twins, edge analytics, and cloud-connected controllers form the core of next-generation factories, creating new revenue pools for service providers that overlay condition-based maintenance atop existing hardware stacks. Meanwhile, tariff-driven redesigns of semiconductor sourcing are accelerating regional production footprints, further lifting the factory automation and industrial controls market trajectory. Platform vendors that blend operational-technology expertise with secure software ecosystems continue to gain pricing power, supported by government funding such as the USD 53 billion CHIPS Act that underwrites capital outlays for domestic fabs.

Global Factory Automation And Industrial Controls Market Trends and Insights

Industry 4.0 Adoption Acceleration

Roughly 80% of global producers intend to embed Industry 4.0 solutions by 2025, yet only 10% have achieved end-to-end digitization. National programs-such as the UK's Made Smarter grants and China's network of 33 Manufacturing Innovation

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Centers-offer capital and technical guidance, pushing the factory automation and industrial controls market toward advanced analytics and autonomous optimisation. Singapore's Smart Industry Readiness Index likewise helps mid-sized firms benchmark progress, ensuring that automated mobile robots and cloud scheduling tools deliver measurable cost relief. Convergence of AI, IoT sensors, and big-data engines yields real-time insights that cut scrap, tune energy loads, and shorten maintenance interventions. Vendors differentiate by wrapping cybersecurity and remote-support layers around these data flows, turning routine controller sales into multi-year service annuities.

#### Energy-Efficiency Mandates & Cost Pressure

Governments invested more than USD 1 trillion in efficiency programs and now expect industry to shoulder a sizeable share of the global CO<sub>2</sub>-reduction target. Factories respond by installing variable-speed drives, smart compressors, and AI-enabled scheduling platforms that shift production to off-peak renewable availability. The United Nations Economic Commission for Europe promotes industrial energy-efficiency best practices, underscoring the link between digital controls and decarbonisation. In the factory automation and industrial controls market, vendors now pre-package carbon dashboards with programmable logic controllers, turning compliance into a value-added service. As utilities raise time-of-use tariffs, fast-payback projects such as intelligent lighting and heat-recovery systems climb the corporate capital list.

#### High Upfront CAPEX of Automation Projects

Comprehensive automation programs often exceed traditional budgeting cycles, especially for small and mid-sized enterprises. Sector M&A multiples reached 18 times EBITDA in 2024, raising vendor pricing expectations and extending break-even horizons. Universal baseline import tariffs of 10%, plus a 50% duty on Chinese semiconductors, elevate component costs and complicate ROI math for capital programmes. While public grants under the CHIPS Act defray some expenses, managers still contend with training outlays and integration risks that may disrupt production during cut-overs.

Other drivers and restraints analyzed in the detailed report include:

Rising Labor Shortages in Manufacturing / Low-Code / No-Code Automation Platforms / Cyber-Security Vulnerabilities in OT Networks /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Industrial control systems secured 58% of the factory automation and industrial controls market in 2024, underscoring their role as the operational backbone for continuous and discrete manufacturing. Distributed control systems, SCADA, and modern PLCs integrate AI-powered diagnostics that pre-empt downtime events and synchronise with enterprise resource planning for just-in-time sequencing. Demand intensifies in semiconductor fabrication and battery cell assembly, areas that rely on microsecond-level loop execution to achieve defect-free throughput. At the same time, the factory automation and industrial controls market size attributed to field devices is on track to expand at 9.8% CAGR to 2030, propelled by advances in smart cameras and collaborative robotics that embed self-learning algorithms close to the production line.

Machine-vision platforms move beyond simple presence checks toward 3D measurement of complex contours, enabling in-line correction rather than post-process rework. Industrial robots, once fenced, now share workspace with humans, guided by safe-motion firmware and proximity sensors. These capabilities lower integration barriers and open fresh opportunities in industries with shorter product cycles. Sensor manufacturers push higher-resolution, lower-power designs that feed real-time vibration, acoustic, and thermal signatures back to the control layer, reinforcing predictive-maintenance models that stretch asset

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life and limit unplanned outages.

Hardware generated 62.5% of the factory automation and industrial controls market size in 2024 as companies refreshed aging controllers and servo drives to handle faster cycle times and tighter tolerances. Nevertheless, service revenues are climbing 11.2% per year, reflecting management's preference for outcome-based contracts that de-risk technology adoption. Multi-year agreements often bundle installation, integration, and analytics support into usage-based pricing frameworks that align vendor incentives with plant performance.

Predictive-maintenance subscriptions aggregate vibration and temperature trends, benchmarking equipment fleets against anonymised peer datasets to spotlight outliers well before catastrophic failure. System-integration houses monetise protocol converters and edge gateways that join legacy Modbus devices to cloud dashboards running on secure OPC UA links. As the installed base of intelligent sensors swells, training and change-management engagements rise in parallel, completing the shift from one-time capital transactions to annuity-style service flows within the factory automation and industrial controls market.

The Factory and Industrial Automation Market Segmented Into Product (By Industrial Control Systems, Field Devices), Component (hardware and More), Control System Architecture (Proprietary / Vendor-Specific and More), End-User Industry (Automotive, Chemical and Petrochemical, Utility and More), and by Geography. The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

Asia captured 39.4% of 2024 revenue thanks to dense manufacturing ecosystems, skilled labour pools, and assertive digital-policy frameworks. China's 2025-era initiatives finance demonstration lines that combine AI scheduling with 5G-enabled motion control, while Japanese conglomerates deploy autonomous haulage and precision welding robots to offset chronic labour gaps. South Korea's chip fabrication complexes and India's smart-meter roll-outs further extend hardware demand, reinforcing Asia's central role in the factory automation and industrial controls market.

North American manufacturers accelerate investments as supply-chain sovereignty climbs the federal agenda. The CHIPS Act's USD 53 billion allotment stimulates local sensor and controller production, creating knock-on demand for secure edge-computing appliances. Universal tariffs introduced in April 2025 reinforce near-shoring, encouraging automation in small and mid-tier plants that previously relied on offshore component sourcing.

Europe focuses on sustainability and cyber-resilience. While the EUR 150 billion allocation for digital transition under the Recovery and Resilience Facility (USD 163 billion) aims to modernise industrial bases, execution gaps prompt many firms to leverage private-sector integrators to meet reporting deadlines eca. Compliance pressures with energy codes and supply-chain traceability hold particular sway in food, chemicals, and consumer goods plants.

South America, though starting from a smaller installed base, is projected to expand at a 10.1% CAGR through 2030. Brazil's ?New Industry Brazil? program earmarks R\$ 300 billion (USD 61 billion) for R&D incentives, equipment credits, and tax benefits, making automation upgrades financially attractive. Argentina's digital-factory roadmap encourages IoT pilots in agricultural machinery and food processing despite skills shortages. As cross-border technology transfer grows, regional system integrators partner with global OEMs to deliver turnkey lines suited to smaller batch volumes and variable-quality power supplies common in the region.

The Middle East and Africa join the factory automation and industrial controls market as policy makers diversify away from resource-heavy sectors. Green-field industrial zones embed predictive-maintenance platforms from inception, allowing them to leapfrog legacy architectures and focus on data-driven operations keyed to export-market compliance.

List of Companies Covered in this Report:

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Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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