

## **Mexico Factory Automation And Industrial Controls - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 160 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:**

Mexico Factory Automation And Industrial Controls Market Analysis

Mexico factory automation and industrial controls market size in 2026 is estimated at USD 6.33 billion, growing from 2025 value of USD 5.9 billion with 2031 projections showing USD 9.02 billion, growing at 7.34% CAGR over 2026-2031. Mexico's transformation into a technology-enabled manufacturing base is facilitated by near-shoring, government incentives under the "Mexico 4.0" initiative, decarbonization funding, and declining robot prices. Multinational OEM relocations, particularly in the automotive and pharmaceutical industries, continually raise the automation benchmarks. Vendors accelerate software integration to deliver predictive-quality analytics, while plant owners invest in Industrial-IoT retrofits to modernize legacy lines and improve uptime. Exchange-rate volatility and skilled-labor shortages remain headwinds; nevertheless, rising ESG mandates and border-region infrastructure upgrades sustain automation capex.

Mexico Factory Automation And Industrial Controls Market Trends and Insights

Surge in Industrial-IoT Retrofit Projects Accelerates Digital Transformation

Mexico's legacy plants intensify Industrial-IoT retrofits to match greenfield benchmarks. Stanley Black & Decker's Reynosa site deployed 5,000 sensors and cut downtime by 23%, underscoring retrofit ROI. Automotive foundry POK in Guadalajara lifted casting precision 18% after advanced process-control upgrades. Government PODEBI incentives offer accelerated depreciation, making upgrades affordable for SMEs. Vendors therefore bundle modular gateways and cloud analytics to integrate with

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

heterogenous legacy PLCs and deliver rapid productivity gains without line stoppages.

### Near-shoring Momentum Reshapes North-American Manufacturing Geography

U.S. and Asian OEMs shorten supply chains, propelling immediate automation outlays. Tesla's projected USD 10 billion Gigafactory in Nuevo Leon sparked USD 15 billion in supplier commitments during 2024. BMW doubled San Luis Potosi capacity to export electrified models globally. Battery leader CATL selected Mexico for a USD 5 billion cell plant, transferring advanced robotized assembly once confined to Asia. These projects demand high-throughput robotics, MES, and traceability solutions, accelerating uptake of integrated automation platforms across northern and Bajio clusters.

### Skilled-Labor Shortage Constrains Automation Implementation

INEGI logged a 34% deficit of certified automation technicians in 2024. Only 23% of technical programs teach IIoT and AI modules. Consequently, integrators import expatriate engineers, which inflates project costs and extends commissioning times. Manufacturers are now co-investing with vendors in academic programs, yet widespread competence gaps may temper the deployment speed until vocational curricula align with industry demands.

Other drivers and restraints analyzed in the detailed report include:

Government "Mexico 4.0" Initiative Drives Technology Adoption  
Decarbonization Mandates Accelerate Automation Investment  
Cyber-security Vulnerabilities Threaten Operational Technology Networks

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

### Segment Analysis

Field devices accounted for 61.92% of 2025 revenue, anchoring the Mexico factory automation and industrial controls market. High-density sensor arrays in automotive paint shops and food-grade robotics in bakeries drive shipments of sensors, vision, and drive systems. Ford's Hermosillo line operated over 2,000 inline vision sensors to ensure panel tolerances. Grupo Bimbo's 150 AGVs lowered logistics costs by 28%. Industrial control systems, although only 38.08% of the 2025 value, should expand at a 8.61% CAGR as integrated SCADA-MES suites replace siloed PLC islands. Pharmaceutical and chemical firms mandate DCS redundancy for batch integrity, while utilities deploy SCADA for grid modernisation.

A richer data layer around field devices underpins flexible manufacturing. Vendors pre-configure devices with OPC-UA and Ethernet/IP, cutting integration time by 20%. As traceability rules tighten for EV batteries, plant owners add RFID readers and environmental sensors, supporting predictive-quality demand. This progression positions industrial control systems to capture incremental share of the Mexico factory automation and industrial controls market size during 2026-2031.

Hardware still held 50.74% share in 2025. Mexico's greenfield EV battery and pharmaceutical lines require extensive robots, drives, and IPCs, underpinning hardware demand. Local panel assemblers in Nuevo Leon shorten lead times and comply with USMCA rules of origin, sustaining domestic value addition. However, software revenue should grow fastest at 8.88% CAGR as manufacturers seek MES, digital twins, and analytics. Coca-Cola FEMSA's AI-enabled OEE dashboard lifted efficiency 19%.

Service revenues-encompassing installation, predictive maintenance, and cybersecurity-rise in tandem with software sales. Vendors bundle outcome-based contracts, linking fees to downtime reduction. As flexible automation spreads, line-reconfiguration consulting becomes a premium niche, particularly for pharmaceutical batch optimization.

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

The Mexico Factory Automation and Industrial Controls Market Report is Segmented by Product (Field Devices, and Industrial Control Systems), Component (Hardware, Software, and Services), Automation Level (Fixed Automation, Programmable Automation, and Flexible/Integrated Automation), and End-User Industry (Automotive, Chemical and Petrochemical, Utilities, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

ABB Ltd. Rockwell Automation Inc. Siemens AG Schneider Electric SE Honeywell International Inc. Mitsubishi Electric Corporation Omron Corporation Emerson Electric Co. Robert Bosch GmbH Yokogawa Electric Corporation Texas Instruments Inc. Fanuc Corporation KUKA AG Yaskawa Electric Corporation Keyence Corporation Delta Electronics Inc. Beckhoff Automation GmbH and Co. KG B&R Industrial Automation GmbH Phoenix Contact GmbH and Co. KG WEG Industrias S.A.

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 LANDSCAPE

- 4.1 Market Overview
- 4.2 Industry Supply-Chain Analysis
- 4.3 Regulatory Landscape
- 4.4 Technological Outlook
- 4.5 Impact of Macroeconomic Factors
- 4.6 Porter's Five Forces Analysis
  - 4.6.1 Bargaining Power of Suppliers
  - 4.6.2 Bargaining Power of Buyers
  - 4.6.3 Threat of New Entrants
  - 4.6.4 Threat of Substitutes
  - 4.6.5 Intensity of Competitive Rivalry
- 4.7 Market Drivers
  - 4.7.1 Surge in Industrial-IoT Retrofit Projects (2025+)
  - 4.7.2 Near-shoring Boost of North-American OEMs
  - 4.7.3 Government "Mexico 4.0" Tax Incentives
  - 4.7.4 Decarbonization-linked Automation Funding
  - 4.7.5 Falling Robot Average Selling Price
  - 4.7.6 AI-based Predictive-Quality Demand
- 4.8 Market Restraints
  - 4.8.1 Persistent Skilled-Labor Shortage

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 4.8.2 Mid-tier Supplier Cyber-security Gaps
- 4.8.3 Peso-USD FX Volatility on Capex
- 4.8.4 Legacy Plant Infrastructure Lock-in

## 5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

### 5.1 By Product

- 5.1.1 Field Devices
  - 5.1.1.1 Machine Vision
  - 5.1.1.2 Robotics
  - 5.1.1.3 Sensors and Transmitters
  - 5.1.1.4 Motors and Drives
  - 5.1.1.5 Other Field Devices
- 5.1.2 Industrial Control Systems
  - 5.1.2.1 SCADA
  - 5.1.2.2 DCS
  - 5.1.2.3 PLC
  - 5.1.2.4 MES
  - 5.1.2.5 PLM
  - 5.1.2.6 ERP
  - 5.1.2.7 HMI
  - 5.1.2.8 Other Control Systems

### 5.2 By Component

- 5.2.1 Hardware
- 5.2.2 Software
- 5.2.3 Services

### 5.3 By Automation Level

- 5.3.1 Fixed Automation
- 5.3.2 Programmable Automation
- 5.3.3 Flexible/Integrated Automation

### 5.4 By End-user Industry

- 5.4.1 Automotive
- 5.4.2 Chemical and Petrochemical
- 5.4.3 Utilities
- 5.4.4 Pharmaceutical
- 5.4.5 Food and Beverage
- 5.4.6 Oil and Gas
- 5.4.7 Other Industries

## 6 COMPETITIVE LANDSCAPE

### 6.1 Market Concentration

### 6.2 Strategic Moves

### 6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

#### 6.4.1 ABB Ltd.

#### 6.4.2 Rockwell Automation Inc.

#### 6.4.3 Siemens AG

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- 6.4.4 Schneider Electric SE
- 6.4.5 Honeywell International Inc.
- 6.4.6 Mitsubishi Electric Corporation
- 6.4.7 Omron Corporation
- 6.4.8 Emerson Electric Co.
- 6.4.9 Robert Bosch GmbH
- 6.4.10 Yokogawa Electric Corporation
- 6.4.11 Texas Instruments Inc.
- 6.4.12 Fanuc Corporation
- 6.4.13 KUKA AG
- 6.4.14 Yaskawa Electric Corporation
- 6.4.15 Keyence Corporation
- 6.4.16 Delta Electronics Inc.
- 6.4.17 Beckhoff Automation GmbH and Co. KG
- 6.4.18 B&R Industrial Automation GmbH
- 6.4.19 Phoenix Contact GmbH and Co. KG
- 6.4.20 WEG Industrias S.A.

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

### 7.1 White-space and Unmet-need Assessment

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Mexico Factory Automation And Industrial Controls - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 160 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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

