

Global Digital Positioner Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Digital Positioner market size is expected to reach \$ 971 million by 2032, rising at a market growth of 4.5% CAGR during the forecast period (2026-2032).

In 2025, global Digital Positioners production reached approximately 1,173 K Units, with a average price of 564 USD/Unit.

The control valve is the terminal of the control system, and the Digital Positioners plays a very important role in the control performance of the entire control valve and on-site performance. The Digital Positioners can be used in the control process of the Digital Positioners to achieve high-quality adjustment and increase the accuracy and stability of the process control.

Digital Positioners are digital valve controllers, microprocessor-based, current to pneumatic instruments with internal logic capability. They are designed to convert a current signal to a pressure signal to operate a valve while monitoring and recording data. They function very similarly to an analog-type positioner, except the electronic signal conversion is digital rather than analog.

Digital Positioners are intelligent control and diagnostic devices mounted on pneumatic linear or rotary valve actuators. They typically receive 4–20 mA, HART, FOUNDATION Fieldbus, PROFIBUS or similar control signals, use a microprocessor-based algorithm to compare the command signal with actual valve travel, and drive an I/P converter, pneumatic relay or electric actuation interface to move the valve precisely to the required position. Compared with conventional mechanical or electro-pneumatic positioners, Digital Positioners provide closed-loop valve control together with auto-calibration, remote communication, valve health monitoring, fault alarms, partial-stroke

testing and integration with asset management systems. They enable plants to detect friction increase, air-supply problems, actuator leakage, valve sticking and other early failure signals without shutting down the process, making them a critical field-layer instrument for precision process control, predictive maintenance, energy efficiency and industrial digitalization.

The production model of Digital Positioners is typically characterized by in-house core technology development, platform-based product architecture, configured-to-order or engineered-to-order delivery, and localized assembly and service. Leading suppliers generally control the core algorithm, embedded software, valve diagnostics model, communication protocol compatibility, pneumatic control architecture, reliability validation, explosion-proof certification and functional-safety know-how. Components such as PCBs, power modules, pressure sensors, position feedback devices, magneto-resistive or Hall sensors, I/P converters, pneumatic relays, housings, seals and terminals are often sourced globally or supported by EMS partners, while final assembly, calibration, communication configuration, valve integration and field service are completed through regional manufacturing and service networks. Flowserve's annual filing describes a model combining engineered-to-order and configured-to-order flow-control products, and also highlights smart valve technologies that integrate sensors, microprocessor controls and software into digital positioners for real-time system analysis and asset-health indication.

In terms of profitability, smart valve positioners usually carry higher margins than mechanical valve accessories and standard pneumatic components, but lower margins than pure software subscriptions. Based on Emerson's 2025 disclosures for its Final Control and Intelligent Devices businesses, the gross margin of international premium Digital Positioners and positioner-equipped control valve packages is generally estimated at about 35%–55%. High-end explosion-proof, SIL/safety-loop, advanced diagnostic and asset-management-integrated models tend to be closer to the upper end, while general-purpose, regional-brand and highly competitive project-based products are more often in the 25%–40% range. Flowserve also states that aftermarket services, diagnostics, maintenance and replacement businesses are generally higher-margin than original equipment, which means calibration services, diagnostic software and valve-health management can improve lifecycle profitability.

Upstream suppliers include semiconductor chips, industrial MCUs, analog signal-chain components, pressure and displacement sensors, magnetic feedback modules, precision pneumatic components, aluminum/stainless-steel/engineering-plastic housings, explosion-proof terminals and seals, industrial communication stacks and

diagnostic software. Midstream participants include Emerson, ABB, Siemens, Flowserve, Baker Hughes/Masonilan, SAMSON, Rotork, Neles (Valmet) and regional Chinese suppliers, which handle product development, certification, production, valve integration and sales channels. Downstream demand is concentrated in oil and gas, refining, chemicals, power, LNG, mining, pharmaceuticals, food and beverage, water treatment, hydrogen and carbon-capture process industries. The product's value is increasingly derived not only from hardware sales, but also from an integrated system of "positioner + control valve + actuator + diagnostic software + field service."

Market Development Opportunities & Main Driving Factors

Digital Positioners are entering a strategic growth window as process industries move from conventional automation toward diagnosable, predictive and optimized control. In sectors such as petrochemicals, chemicals, power, LNG, water treatment, pharmaceuticals and new-energy process plants, requirements for safe continuous operation, energy efficiency, emissions control and leaner maintenance are making control valves a renewed focus of digital investment. At the policy level, the U.S. Department of Energy is supporting cross-sector industrial energy-efficiency and decarbonization technologies, China's MIIT-backed smart-factory program is accelerating industrial digitization and networking, and NIST highlights trusted computing and communication technologies as a foundation of smart manufacturing. At the corporate level, Emerson and Flowserve both emphasize intelligent devices, valve automation, diagnostics, DCS/AMS interoperability and energy-transition applications. Therefore, growth is driven not only by new control valve installations, but also by retrofit demand across the installed base, predictive maintenance, asset-health management and energy-compliance needs.

Market Challenges, Risks, & Restraints

The market faces three core restraints. First, capital expenditure in end-user industries is cyclical, and oil and gas, chemical, mining and power projects are sensitive to energy prices, interest rates, permitting cycles and geopolitical uncertainty; project delays directly affect demand for new valves and positioners. Second, Digital Positioners must operate reliably under high temperature, corrosion, vibration, hazardous-area, SIL safety and compressed-air-quality constraints, making certification, field validation and brand credibility significant entry barriers. Third, industrial communication protocols, DCS/AMS compatibility, cybersecurity, software licensing and aftermarket service capability are becoming decisive competitive factors, making it difficult for low-cost hardware-only suppliers to penetrate core control loops in high-end continuous process

plants. Meanwhile, regional supply-chain localization and customer cost-reduction pressure may compress margins for low- and mid-end models, but will also accelerate local substitution, regional assembly and service network expansion.

Downstream Demand Trends

Downstream demand is shifting from single-device purchasing toward performance, downtime risk and lifecycle-cost optimization. Conventional refining, chemicals, power and water treatment remain the core demand base, with priorities centered on brownfield upgrades, critical-loop modernization, valve-health diagnostics and spare-part services. Emerging and high-reliability applications such as LNG, hydrogen, carbon capture, nuclear power, desalination, sterile pharmaceutical production and advanced materials require stronger explosion-proof, anti-corrosion, low-leakage, remote diagnostic and data-connectivity capabilities. As plant digitalization extends from control rooms to field-level assets, Digital Positioners will increasingly serve as both a control-valve data gateway and a predictive-maintenance node. Purchasing decisions will also expand from instrumentation teams to production, maintenance, energy-management and digital-transformation teams. Future competitive advantage will depend more on valve-domain expertise, diagnostic algorithms, industrial communication ecosystems, global service response and deep integration with customer asset management systems.

This report studies the global Digital Positioner production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Digital Positioner and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Digital Positioner that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Digital Positioner total production and demand, 2021-2032, (K Units)

Global Digital Positioner total production value, 2021-2032, (USD Million)

Global Digital Positioner production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Digital Positioner consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Digital Positioner domestic production, consumption, key domestic

manufacturers and share

Global Digital Positioner production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Digital Positioner production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Digital Positioner production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Digital Positioner market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Emerson, ABB, Baker Hughes, Neles (Valmet), Flowserve, Siemens, SAMSON, Schneider Electric, Shenzhen Maxonic, Nihon KOSO Co.,Ltd, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Digital Positioner market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Digital Positioner Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Digital Positioner Market, Segmentation by Type:

Single Acting Positioners

Double Acting Positioners

Global Digital Positioner Market, Segmentation by Actuator Type:

Linear Positioners

Rotary Positioners

Global Digital Positioner Market, Segmentation by Explosion-proof:

Non-explosion-proof Type

Explosion-proof Type

Global Digital Positioner Market, Segmentation by Application:

Oil, Gas & Petrochemical

Chemical

Power Industry

Metals & Metallurgy

Paper & Pulp

Pharmaceutical

Food & Beverages

Others

Companies Profiled:

Emerson

ABB

Baker Hughes

Neles (Valmet)

Flowserve

Siemens

SAMSON

Schneider Electric

Shenzhen Maxonic

Nihon KOSO Co.,Ltd

Rotork

Chongqing Chuanyi Automation

GEMU Group

B?rkert

Azbil

SMC

Wuhan Toledo

Westlock Controls

3S CO.,LTD.

Tissin Co., Ltd

Spirax Sarco

Valve Related Controls (VRC)

Power-Genex

ARPUR Instrument Technology (Wuhu)

ChangShu Huier

Rotex Automation

VRG Controls

Wuzhong Instrument

North Photoelectric

Suzhou Yingchuang Intelligent

POWERFLOW

Shenzhen MORC Controls

Key Questions Answered:

1. How big is the global Digital Positioner market?
2. What is the demand of the global Digital Positioner market?
3. What is the year over year growth of the global Digital Positioner market?
4. What is the production and production value of the global Digital Positioner market?
5. Who are the key producers in the global Digital Positioner market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Digital Positioner Introduction
- 1.2 World Digital Positioner Supply & Forecast
 - 1.2.1 World Digital Positioner Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Digital Positioner Production (2021-2032)
 - 1.2.3 World Digital Positioner Pricing Trends (2021-2032)
- 1.3 World Digital Positioner Production by Region (Based on Production Site)
 - 1.3.1 World Digital Positioner Production Value by Region (2021-2032)
 - 1.3.2 World Digital Positioner Production by Region (2021-2032)
 - 1.3.3 World Digital Positioner Average Price by Region (2021-2032)
 - 1.3.4 North America Digital Positioner Production (2021-2032)
 - 1.3.5 Europe Digital Positioner Production (2021-2032)
 - 1.3.6 China Digital Positioner Production (2021-2032)
 - 1.3.7 Japan Digital Positioner Production (2021-2032)
 - 1.3.8 South Korea Digital Positioner Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Digital Positioner Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Digital Positioner Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Digital Positioner Demand (2021-2032)
- 2.2 World Digital Positioner Consumption by Region
 - 2.2.1 World Digital Positioner Consumption by Region (2021-2026)
 - 2.2.2 World Digital Positioner Consumption Forecast by Region (2027-2032)
- 2.3 United States Digital Positioner Consumption (2021-2032)
- 2.4 China Digital Positioner Consumption (2021-2032)
- 2.5 Europe Digital Positioner Consumption (2021-2032)
- 2.6 Japan Digital Positioner Consumption (2021-2032)
- 2.7 South Korea Digital Positioner Consumption (2021-2032)
- 2.8 ASEAN Digital Positioner Consumption (2021-2032)
- 2.9 India Digital Positioner Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Digital Positioner Production Value by Manufacturer (2021-2026)
- 3.2 World Digital Positioner Production by Manufacturer (2021-2026)
- 3.3 World Digital Positioner Average Price by Manufacturer (2021-2026)
- 3.4 Digital Positioner Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Digital Positioner Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Digital Positioner in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Digital Positioner in 2025
- 3.6 Digital Positioner Market: Overall Company Footprint Analysis
 - 3.6.1 Digital Positioner Market: Region Footprint
 - 3.6.2 Digital Positioner Market: Company Product Type Footprint
 - 3.6.3 Digital Positioner Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Digital Positioner Production Value Comparison
 - 4.1.1 United States VS China: Digital Positioner Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Digital Positioner Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Digital Positioner Production Comparison
 - 4.2.1 United States VS China: Digital Positioner Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Digital Positioner Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Digital Positioner Consumption Comparison
 - 4.3.1 United States VS China: Digital Positioner Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Digital Positioner Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Digital Positioner Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Digital Positioner Manufacturers, Headquarters and Production Site (States, Country)

- 4.4.2 United States Based Manufacturers Digital Positioner Production Value (2021-2026)
- 4.4.3 United States Based Manufacturers Digital Positioner Production (2021-2026)
- 4.5 China Based Digital Positioner Manufacturers and Market Share
 - 4.5.1 China Based Digital Positioner Manufacturers, Headquarters and Production Site (Province, Country)
 - 4.5.2 China Based Manufacturers Digital Positioner Production Value (2021-2026)
 - 4.5.3 China Based Manufacturers Digital Positioner Production (2021-2026)
- 4.6 Rest of World Based Digital Positioner Manufacturers and Market Share, 2021-2026
 - 4.6.1 Rest of World Based Digital Positioner Manufacturers, Headquarters and Production Site (State, Country)
 - 4.6.2 Rest of World Based Manufacturers Digital Positioner Production Value (2021-2026)
 - 4.6.3 Rest of World Based Manufacturers Digital Positioner Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World Digital Positioner Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Single Acting Positioners
 - 5.2.2 Double Acting Positioners
- 5.3 Market Segment by Type
 - 5.3.1 World Digital Positioner Production by Type (2021-2032)
 - 5.3.2 World Digital Positioner Production Value by Type (2021-2032)
 - 5.3.3 World Digital Positioner Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY ACTUATOR TYPE

- 6.1 World Digital Positioner Market Size Overview by Actuator Type: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Actuator Type
 - 6.2.1 Linear Positioners
 - 6.2.2 Rotary Positioners
- 6.3 Market Segment by Actuator Type
 - 6.3.1 World Digital Positioner Production by Actuator Type (2021-2032)
 - 6.3.2 World Digital Positioner Production Value by Actuator Type (2021-2032)
 - 6.3.3 World Digital Positioner Average Price by Actuator Type (2021-2032)

7 MARKET ANALYSIS BY EXPLOSION-PROOF

7.1 World Digital Positioner Market Size Overview by Explosion-proof: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Explosion-proof

7.2.1 Non-explosion-proof Type

7.2.2 Explosion-proof Type

7.3 Market Segment by Explosion-proof

7.3.1 World Digital Positioner Production by Explosion-proof (2021-2032)

7.3.2 World Digital Positioner Production Value by Explosion-proof (2021-2032)

7.3.3 World Digital Positioner Average Price by Explosion-proof (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Digital Positioner Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Oil, Gas & Petrochemical

8.2.2 Chemical

8.2.3 Power Industry

8.2.4 Metals & Metallurgy

8.2.5 Paper & Pulp

8.2.6 Pharmaceutical

8.2.7 Food & Beverages

8.2.8 Others

8.3 Market Segment by Application

8.3.1 World Digital Positioner Production by Application (2021-2032)

8.3.2 World Digital Positioner Production Value by Application (2021-2032)

8.3.3 World Digital Positioner Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Emerson

9.1.1 Emerson Details

9.1.2 Emerson Major Business

9.1.3 Emerson Digital Positioner Product and Services

9.1.4 Emerson Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Emerson Recent Developments/Updates

9.1.6 Emerson Competitive Strengths & Weaknesses

9.2 ABB

9.2.1 ABB Details

9.2.2 ABB Major Business

9.2.3 ABB Digital Positioner Product and Services

9.2.4 ABB Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 ABB Recent Developments/Updates

9.2.6 ABB Competitive Strengths & Weaknesses

9.3 Baker Hughes

9.3.1 Baker Hughes Details

9.3.2 Baker Hughes Major Business

9.3.3 Baker Hughes Digital Positioner Product and Services

9.3.4 Baker Hughes Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Baker Hughes Recent Developments/Updates

9.3.6 Baker Hughes Competitive Strengths & Weaknesses

9.4 Neles (Valmet)

9.4.1 Neles (Valmet) Details

9.4.2 Neles (Valmet) Major Business

9.4.3 Neles (Valmet) Digital Positioner Product and Services

9.4.4 Neles (Valmet) Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Neles (Valmet) Recent Developments/Updates

9.4.6 Neles (Valmet) Competitive Strengths & Weaknesses

9.5 Flowserve

9.5.1 Flowserve Details

9.5.2 Flowserve Major Business

9.5.3 Flowserve Digital Positioner Product and Services

9.5.4 Flowserve Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Flowserve Recent Developments/Updates

9.5.6 Flowserve Competitive Strengths & Weaknesses

9.6 Siemens

9.6.1 Siemens Details

9.6.2 Siemens Major Business

9.6.3 Siemens Digital Positioner Product and Services

9.6.4 Siemens Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Siemens Recent Developments/Updates

9.6.6 Siemens Competitive Strengths & Weaknesses

9.7 SAMSON

9.7.1 SAMSON Details

9.7.2 SAMSON Major Business

9.7.3 SAMSON Digital Positioner Product and Services

9.7.4 SAMSON Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 SAMSON Recent Developments/Updates

9.7.6 SAMSON Competitive Strengths & Weaknesses

9.8 Schneider Electric

9.8.1 Schneider Electric Details

9.8.2 Schneider Electric Major Business

9.8.3 Schneider Electric Digital Positioner Product and Services

9.8.4 Schneider Electric Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Schneider Electric Recent Developments/Updates

9.8.6 Schneider Electric Competitive Strengths & Weaknesses

9.9 Shenzhen Maxonic

9.9.1 Shenzhen Maxonic Details

9.9.2 Shenzhen Maxonic Major Business

9.9.3 Shenzhen Maxonic Digital Positioner Product and Services

9.9.4 Shenzhen Maxonic Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Shenzhen Maxonic Recent Developments/Updates

9.9.6 Shenzhen Maxonic Competitive Strengths & Weaknesses

9.10 Nihon KOSO Co.,Ltd

9.10.1 Nihon KOSO Co.,Ltd Details

9.10.2 Nihon KOSO Co.,Ltd Major Business

9.10.3 Nihon KOSO Co.,Ltd Digital Positioner Product and Services

9.10.4 Nihon KOSO Co.,Ltd Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Nihon KOSO Co.,Ltd Recent Developments/Updates

9.10.6 Nihon KOSO Co.,Ltd Competitive Strengths & Weaknesses

9.11 Rotork

9.11.1 Rotork Details

9.11.2 Rotork Major Business

9.11.3 Rotork Digital Positioner Product and Services

9.11.4 Rotork Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.11.5 Rotork Recent Developments/Updates
- 9.11.6 Rotork Competitive Strengths & Weaknesses
- 9.12 Chongqing Chuanyi Automation
 - 9.12.1 Chongqing Chuanyi Automation Details
 - 9.12.2 Chongqing Chuanyi Automation Major Business
 - 9.12.3 Chongqing Chuanyi Automation Digital Positioner Product and Services
 - 9.12.4 Chongqing Chuanyi Automation Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Chongqing Chuanyi Automation Recent Developments/Updates
 - 9.12.6 Chongqing Chuanyi Automation Competitive Strengths & Weaknesses
- 9.13 GEMU Group
 - 9.13.1 GEMU Group Details
 - 9.13.2 GEMU Group Major Business
 - 9.13.3 GEMU Group Digital Positioner Product and Services
 - 9.13.4 GEMU Group Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 GEMU Group Recent Developments/Updates
 - 9.13.6 GEMU Group Competitive Strengths & Weaknesses
- 9.14 B?rkert
 - 9.14.1 B?rkert Details
 - 9.14.2 B?rkert Major Business
 - 9.14.3 B?rkert Digital Positioner Product and Services
 - 9.14.4 B?rkert Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 B?rkert Recent Developments/Updates
 - 9.14.6 B?rkert Competitive Strengths & Weaknesses
- 9.15 Azbil
 - 9.15.1 Azbil Details
 - 9.15.2 Azbil Major Business
 - 9.15.3 Azbil Digital Positioner Product and Services
 - 9.15.4 Azbil Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Azbil Recent Developments/Updates
 - 9.15.6 Azbil Competitive Strengths & Weaknesses
- 9.16 SMC
 - 9.16.1 SMC Details
 - 9.16.2 SMC Major Business
 - 9.16.3 SMC Digital Positioner Product and Services
 - 9.16.4 SMC Digital Positioner Production, Price, Value, Gross Margin and Market

Share (2021-2026)

9.16.5 SMC Recent Developments/Updates

9.16.6 SMC Competitive Strengths & Weaknesses

9.17 Wuhan Toledo

9.17.1 Wuhan Toledo Details

9.17.2 Wuhan Toledo Major Business

9.17.3 Wuhan Toledo Digital Positioner Product and Services

9.17.4 Wuhan Toledo Digital Positioner Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.17.5 Wuhan Toledo Recent Developments/Updates

9.17.6 Wuhan Toledo Competitive Strengths & Weaknesses

9.18 Westlock Controls

9.18.1 Westlock Controls Details

9.18.2 Westlock Controls Major Business

9.18.3 Westlock Controls Digital Positioner Product and Services

9.18.4 Westlock Controls Digital Positioner Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.18.5 Westlock Controls Recent Developments/Updates

9.18.6 Westlock Controls Competitive Strengths & Weaknesses

9.19 3S CO.,LTD.

9.19.1 3S CO.,LTD. Details

9.19.2 3S CO.,LTD. Major Business

9.19.3 3S CO.,LTD. Digital Positioner Product and Services

9.19.4 3S CO.,LTD. Digital Positioner Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.19.5 3S CO.,LTD. Recent Developments/Updates

9.19.6 3S CO.,LTD. Competitive Strengths & Weaknesses

9.20 Tissin Co., Ltd

9.20.1 Tissin Co., Ltd Details

9.20.2 Tissin Co., Ltd Major Business

9.20.3 Tissin Co., Ltd Digital Positioner Product and Services

9.20.4 Tissin Co., Ltd Digital Positioner Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.20.5 Tissin Co., Ltd Recent Developments/Updates

9.20.6 Tissin Co., Ltd Competitive Strengths & Weaknesses

9.21 Spirax Sarco

9.21.1 Spirax Sarco Details

9.21.2 Spirax Sarco Major Business

9.21.3 Spirax Sarco Digital Positioner Product and Services

- 9.21.4 Spirax Sarco Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.21.5 Spirax Sarco Recent Developments/Updates
- 9.21.6 Spirax Sarco Competitive Strengths & Weaknesses
- 9.22 Valve Related Controls (VRC)
 - 9.22.1 Valve Related Controls (VRC) Details
 - 9.22.2 Valve Related Controls (VRC) Major Business
 - 9.22.3 Valve Related Controls (VRC) Digital Positioner Product and Services
 - 9.22.4 Valve Related Controls (VRC) Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.22.5 Valve Related Controls (VRC) Recent Developments/Updates
 - 9.22.6 Valve Related Controls (VRC) Competitive Strengths & Weaknesses
- 9.23 Power-Genex
 - 9.23.1 Power-Genex Details
 - 9.23.2 Power-Genex Major Business
 - 9.23.3 Power-Genex Digital Positioner Product and Services
 - 9.23.4 Power-Genex Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.23.5 Power-Genex Recent Developments/Updates
 - 9.23.6 Power-Genex Competitive Strengths & Weaknesses
- 9.24 ARPUR Instrument Technology (Wuhu)
 - 9.24.1 ARPUR Instrument Technology (Wuhu) Details
 - 9.24.2 ARPUR Instrument Technology (Wuhu) Major Business
 - 9.24.3 ARPUR Instrument Technology (Wuhu) Digital Positioner Product and Services
 - 9.24.4 ARPUR Instrument Technology (Wuhu) Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.24.5 ARPUR Instrument Technology (Wuhu) Recent Developments/Updates
 - 9.24.6 ARPUR Instrument Technology (Wuhu) Competitive Strengths & Weaknesses
- 9.25 ChangShu Huier
 - 9.25.1 ChangShu Huier Details
 - 9.25.2 ChangShu Huier Major Business
 - 9.25.3 ChangShu Huier Digital Positioner Product and Services
 - 9.25.4 ChangShu Huier Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.25.5 ChangShu Huier Recent Developments/Updates
 - 9.25.6 ChangShu Huier Competitive Strengths & Weaknesses
- 9.26 Rotex Automation
 - 9.26.1 Rotex Automation Details
 - 9.26.2 Rotex Automation Major Business

- 9.26.3 Rotex Automation Digital Positioner Product and Services
- 9.26.4 Rotex Automation Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.26.5 Rotex Automation Recent Developments/Updates
- 9.26.6 Rotex Automation Competitive Strengths & Weaknesses
- 9.27 VRG Controls
 - 9.27.1 VRG Controls Details
 - 9.27.2 VRG Controls Major Business
 - 9.27.3 VRG Controls Digital Positioner Product and Services
 - 9.27.4 VRG Controls Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.27.5 VRG Controls Recent Developments/Updates
 - 9.27.6 VRG Controls Competitive Strengths & Weaknesses
- 9.28 Wuzhong Instrument
 - 9.28.1 Wuzhong Instrument Details
 - 9.28.2 Wuzhong Instrument Major Business
 - 9.28.3 Wuzhong Instrument Digital Positioner Product and Services
 - 9.28.4 Wuzhong Instrument Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.28.5 Wuzhong Instrument Recent Developments/Updates
 - 9.28.6 Wuzhong Instrument Competitive Strengths & Weaknesses
- 9.29 North Photoelectric
 - 9.29.1 North Photoelectric Details
 - 9.29.2 North Photoelectric Major Business
 - 9.29.3 North Photoelectric Digital Positioner Product and Services
 - 9.29.4 North Photoelectric Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.29.5 North Photoelectric Recent Developments/Updates
 - 9.29.6 North Photoelectric Competitive Strengths & Weaknesses
- 9.30 Suzhou Yingchuang Intelligent
 - 9.30.1 Suzhou Yingchuang Intelligent Details
 - 9.30.2 Suzhou Yingchuang Intelligent Major Business
 - 9.30.3 Suzhou Yingchuang Intelligent Digital Positioner Product and Services
 - 9.30.4 Suzhou Yingchuang Intelligent Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.30.5 Suzhou Yingchuang Intelligent Recent Developments/Updates
 - 9.30.6 Suzhou Yingchuang Intelligent Competitive Strengths & Weaknesses
- 9.31 POWERFLOW
 - 9.31.1 POWERFLOW Details

- 9.31.2 POWERFLOW Major Business
- 9.31.3 POWERFLOW Digital Positioner Product and Services
- 9.31.4 POWERFLOW Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.31.5 POWERFLOW Recent Developments/Updates
- 9.31.6 POWERFLOW Competitive Strengths & Weaknesses
- 9.32 Shenzhen MORC Controls
 - 9.32.1 Shenzhen MORC Controls Details
 - 9.32.2 Shenzhen MORC Controls Major Business
 - 9.32.3 Shenzhen MORC Controls Digital Positioner Product and Services
 - 9.32.4 Shenzhen MORC Controls Digital Positioner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.32.5 Shenzhen MORC Controls Recent Developments/Updates
 - 9.32.6 Shenzhen MORC Controls Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Digital Positioner Industry Chain
- 10.2 Digital Positioner Upstream Analysis
 - 10.2.1 Digital Positioner Core Raw Materials
 - 10.2.2 Main Manufacturers of Digital Positioner Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Digital Positioner Production Mode
- 10.6 Digital Positioner Procurement Model
- 10.7 Digital Positioner Industry Sales Model and Sales Channels
 - 10.7.1 Digital Positioner Sales Model
 - 10.7.2 Digital Positioner Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Digital Positioner Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Digital Positioner Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Digital Positioner Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Digital Positioner Production Value Market Share by Region (2021-2026)
- Table 5. World Digital Positioner Production Value Market Share by Region (2027-2032)
- Table 6. World Digital Positioner Production by Region (2021-2026) & (K Units)
- Table 7. World Digital Positioner Production by Region (2027-2032) & (K Units)
- Table 8. World Digital Positioner Production Market Share by Region (2021-2026)
- Table 9. World Digital Positioner Production Market Share by Region (2027-2032)
- Table 10. World Digital Positioner Average Price by Region (2021-2026) & (US\$/Unit)
- Table 11. World Digital Positioner Average Price by Region (2027-2032) & (US\$/Unit)
- Table 12. Digital Positioner Major Market Trends
- Table 13. World Digital Positioner Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)
- Table 14. World Digital Positioner Consumption by Region (2021-2026) & (K Units)
- Table 15. World Digital Positioner Consumption Forecast by Region (2027-2032) & (K Units)
- Table 16. World Digital Positioner Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Digital Positioner Producers in 2025
- Table 18. World Digital Positioner Production by Manufacturer (2021-2026) & (K Units)
- Table 19. Production Market Share of Key Digital Positioner Producers in 2025
- Table 20. World Digital Positioner Average Price by Manufacturer (2021-2026) & (US\$/Unit)
- Table 21. Global Digital Positioner Company Evaluation Quadrant
- Table 22. World Digital Positioner Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and Digital Positioner Production Site of Key Manufacturer
- Table 24. Digital Positioner Market: Company Product Type Footprint
- Table 25. Digital Positioner Market: Company Product Application Footprint
- Table 26. Digital Positioner Competitive Factors
- Table 27. Digital Positioner New Entrant and Capacity Expansion Plans

Table 28. Digital Positioner Mergers & Acquisitions Activity

Table 29. United States VS China Digital Positioner Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Digital Positioner Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Digital Positioner Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Digital Positioner Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Digital Positioner Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Digital Positioner Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Digital Positioner Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Digital Positioner Production Market Share (2021-2026)

Table 37. China Based Digital Positioner Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Digital Positioner Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Digital Positioner Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Digital Positioner Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Digital Positioner Production Market Share (2021-2026)

Table 42. Rest of World Based Digital Positioner Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Digital Positioner Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Digital Positioner Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Digital Positioner Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Digital Positioner Production Market Share (2021-2026)

Table 47. World Digital Positioner Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Digital Positioner Production by Type (2021-2026) & (K Units)

Table 49. World Digital Positioner Production by Type (2027-2032) & (K Units)

Table 50. World Digital Positioner Production Value by Type (2021-2026) & (USD Million)

Table 51. World Digital Positioner Production Value by Type (2027-2032) & (USD Million)

Table 52. World Digital Positioner Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Digital Positioner Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Digital Positioner Production Value by Actuator Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Digital Positioner Production by Actuator Type (2021-2026) & (K Units)

Table 56. World Digital Positioner Production by Actuator Type (2027-2032) & (K Units)

Table 57. World Digital Positioner Production Value by Actuator Type (2021-2026) & (USD Million)

Table 58. World Digital Positioner Production Value by Actuator Type (2027-2032) & (USD Million)

Table 59. World Digital Positioner Average Price by Actuator Type (2021-2026) & (US\$/Unit)

Table 60. World Digital Positioner Average Price by Actuator Type (2027-2032) & (US\$/Unit)

Table 61. World Digital Positioner Production Value by Explosion-proof, (USD Million), 2021 & 2025 & 2032

Table 62. World Digital Positioner Production by Explosion-proof (2021-2026) & (K Units)

Table 63. World Digital Positioner Production by Explosion-proof (2027-2032) & (K Units)

Table 64. World Digital Positioner Production Value by Explosion-proof (2021-2026) & (USD Million)

Table 65. World Digital Positioner Production Value by Explosion-proof (2027-2032) & (USD Million)

Table 66. World Digital Positioner Average Price by Explosion-proof (2021-2026) & (US\$/Unit)

Table 67. World Digital Positioner Average Price by Explosion-proof (2027-2032) & (US\$/Unit)

Table 68. World Digital Positioner Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Digital Positioner Production by Application (2021-2026) & (K Units)

Table 70. World Digital Positioner Production by Application (2027-2032) & (K Units)

Table 71. World Digital Positioner Production Value by Application (2021-2026) & (USD Million)

Million)

Table 72. World Digital Positioner Production Value by Application (2027-2032) & (USD Million)

Table 73. World Digital Positioner Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Digital Positioner Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Emerson Basic Information, Manufacturing Base and Competitors

Table 76. Emerson Major Business

Table 77. Emerson Digital Positioner Product and Services

Table 78. Emerson Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Emerson Recent Developments/Updates

Table 80. Emerson Competitive Strengths & Weaknesses

Table 81. ABB Basic Information, Manufacturing Base and Competitors

Table 82. ABB Major Business

Table 83. ABB Digital Positioner Product and Services

Table 84. ABB Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. ABB Recent Developments/Updates

Table 86. ABB Competitive Strengths & Weaknesses

Table 87. Baker Hughes Basic Information, Manufacturing Base and Competitors

Table 88. Baker Hughes Major Business

Table 89. Baker Hughes Digital Positioner Product and Services

Table 90. Baker Hughes Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Baker Hughes Recent Developments/Updates

Table 92. Baker Hughes Competitive Strengths & Weaknesses

Table 93. Neles (Valmet) Basic Information, Manufacturing Base and Competitors

Table 94. Neles (Valmet) Major Business

Table 95. Neles (Valmet) Digital Positioner Product and Services

Table 96. Neles (Valmet) Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Neles (Valmet) Recent Developments/Updates

Table 98. Neles (Valmet) Competitive Strengths & Weaknesses

Table 99. Flowserve Basic Information, Manufacturing Base and Competitors

Table 100. Flowserve Major Business

Table 101. Flowserve Digital Positioner Product and Services

Table 102. Flowserve Digital Positioner Production (K Units), Price (US\$/Unit),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Flowserve Recent Developments/Updates

Table 104. Flowserve Competitive Strengths & Weaknesses

Table 105. Siemens Basic Information, Manufacturing Base and Competitors

Table 106. Siemens Major Business

Table 107. Siemens Digital Positioner Product and Services

Table 108. Siemens Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Siemens Recent Developments/Updates

Table 110. Siemens Competitive Strengths & Weaknesses

Table 111. SAMSON Basic Information, Manufacturing Base and Competitors

Table 112. SAMSON Major Business

Table 113. SAMSON Digital Positioner Product and Services

Table 114. SAMSON Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. SAMSON Recent Developments/Updates

Table 116. SAMSON Competitive Strengths & Weaknesses

Table 117. Schneider Electric Basic Information, Manufacturing Base and Competitors

Table 118. Schneider Electric Major Business

Table 119. Schneider Electric Digital Positioner Product and Services

Table 120. Schneider Electric Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Schneider Electric Recent Developments/Updates

Table 122. Schneider Electric Competitive Strengths & Weaknesses

Table 123. Shenzhen Maxonic Basic Information, Manufacturing Base and Competitors

Table 124. Shenzhen Maxonic Major Business

Table 125. Shenzhen Maxonic Digital Positioner Product and Services

Table 126. Shenzhen Maxonic Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Shenzhen Maxonic Recent Developments/Updates

Table 128. Shenzhen Maxonic Competitive Strengths & Weaknesses

Table 129. Nihon KOSO Co.,Ltd Basic Information, Manufacturing Base and Competitors

Table 130. Nihon KOSO Co.,Ltd Major Business

Table 131. Nihon KOSO Co.,Ltd Digital Positioner Product and Services

Table 132. Nihon KOSO Co.,Ltd Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Nihon KOSO Co.,Ltd Recent Developments/Updates

- Table 134. Nihon KOSO Co.,Ltd Competitive Strengths & Weaknesses
- Table 135. Rotork Basic Information, Manufacturing Base and Competitors
- Table 136. Rotork Major Business
- Table 137. Rotork Digital Positioner Product and Services
- Table 138. Rotork Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Rotork Recent Developments/Updates
- Table 140. Rotork Competitive Strengths & Weaknesses
- Table 141. Chongqing Chuanyi Automation Basic Information, Manufacturing Base and Competitors
- Table 142. Chongqing Chuanyi Automation Major Business
- Table 143. Chongqing Chuanyi Automation Digital Positioner Product and Services
- Table 144. Chongqing Chuanyi Automation Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Chongqing Chuanyi Automation Recent Developments/Updates
- Table 146. Chongqing Chuanyi Automation Competitive Strengths & Weaknesses
- Table 147. GEMU Group Basic Information, Manufacturing Base and Competitors
- Table 148. GEMU Group Major Business
- Table 149. GEMU Group Digital Positioner Product and Services
- Table 150. GEMU Group Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. GEMU Group Recent Developments/Updates
- Table 152. GEMU Group Competitive Strengths & Weaknesses
- Table 153. B?rkert Basic Information, Manufacturing Base and Competitors
- Table 154. B?rkert Major Business
- Table 155. B?rkert Digital Positioner Product and Services
- Table 156. B?rkert Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. B?rkert Recent Developments/Updates
- Table 158. B?rkert Competitive Strengths & Weaknesses
- Table 159. Azbil Basic Information, Manufacturing Base and Competitors
- Table 160. Azbil Major Business
- Table 161. Azbil Digital Positioner Product and Services
- Table 162. Azbil Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. Azbil Recent Developments/Updates
- Table 164. Azbil Competitive Strengths & Weaknesses
- Table 165. SMC Basic Information, Manufacturing Base and Competitors

- Table 166. SMC Major Business
- Table 167. SMC Digital Positioner Product and Services
- Table 168. SMC Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. SMC Recent Developments/Updates
- Table 170. SMC Competitive Strengths & Weaknesses
- Table 171. Wuhan Toledo Basic Information, Manufacturing Base and Competitors
- Table 172. Wuhan Toledo Major Business
- Table 173. Wuhan Toledo Digital Positioner Product and Services
- Table 174. Wuhan Toledo Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. Wuhan Toledo Recent Developments/Updates
- Table 176. Wuhan Toledo Competitive Strengths & Weaknesses
- Table 177. Westlock Controls Basic Information, Manufacturing Base and Competitors
- Table 178. Westlock Controls Major Business
- Table 179. Westlock Controls Digital Positioner Product and Services
- Table 180. Westlock Controls Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Westlock Controls Recent Developments/Updates
- Table 182. Westlock Controls Competitive Strengths & Weaknesses
- Table 183. 3S CO.,LTD. Basic Information, Manufacturing Base and Competitors
- Table 184. 3S CO.,LTD. Major Business
- Table 185. 3S CO.,LTD. Digital Positioner Product and Services
- Table 186. 3S CO.,LTD. Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 187. 3S CO.,LTD. Recent Developments/Updates
- Table 188. 3S CO.,LTD. Competitive Strengths & Weaknesses
- Table 189. Tissin Co., Ltd Basic Information, Manufacturing Base and Competitors
- Table 190. Tissin Co., Ltd Major Business
- Table 191. Tissin Co., Ltd Digital Positioner Product and Services
- Table 192. Tissin Co., Ltd Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 193. Tissin Co., Ltd Recent Developments/Updates
- Table 194. Tissin Co., Ltd Competitive Strengths & Weaknesses
- Table 195. Spirax Sarco Basic Information, Manufacturing Base and Competitors
- Table 196. Spirax Sarco Major Business
- Table 197. Spirax Sarco Digital Positioner Product and Services
- Table 198. Spirax Sarco Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 199. Spirax Sarco Recent Developments/Updates
- Table 200. Spirax Sarco Competitive Strengths & Weaknesses
- Table 201. Valve Related Controls (VRC) Basic Information, Manufacturing Base and Competitors
- Table 202. Valve Related Controls (VRC) Major Business
- Table 203. Valve Related Controls (VRC) Digital Positioner Product and Services
- Table 204. Valve Related Controls (VRC) Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 205. Valve Related Controls (VRC) Recent Developments/Updates
- Table 206. Valve Related Controls (VRC) Competitive Strengths & Weaknesses
- Table 207. Power-Genex Basic Information, Manufacturing Base and Competitors
- Table 208. Power-Genex Major Business
- Table 209. Power-Genex Digital Positioner Product and Services
- Table 210. Power-Genex Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 211. Power-Genex Recent Developments/Updates
- Table 212. Power-Genex Competitive Strengths & Weaknesses
- Table 213. ARPUR Instrument Technology (Wuhu) Basic Information, Manufacturing Base and Competitors
- Table 214. ARPUR Instrument Technology (Wuhu) Major Business
- Table 215. ARPUR Instrument Technology (Wuhu) Digital Positioner Product and Services
- Table 216. ARPUR Instrument Technology (Wuhu) Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 217. ARPUR Instrument Technology (Wuhu) Recent Developments/Updates
- Table 218. ARPUR Instrument Technology (Wuhu) Competitive Strengths & Weaknesses
- Table 219. ChangShu Huier Basic Information, Manufacturing Base and Competitors
- Table 220. ChangShu Huier Major Business
- Table 221. ChangShu Huier Digital Positioner Product and Services
- Table 222. ChangShu Huier Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 223. ChangShu Huier Recent Developments/Updates
- Table 224. ChangShu Huier Competitive Strengths & Weaknesses
- Table 225. Rotex Automation Basic Information, Manufacturing Base and Competitors
- Table 226. Rotex Automation Major Business
- Table 227. Rotex Automation Digital Positioner Product and Services

- Table 228. Rotex Automation Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 229. Rotex Automation Recent Developments/Updates
- Table 230. Rotex Automation Competitive Strengths & Weaknesses
- Table 231. VRG Controls Basic Information, Manufacturing Base and Competitors
- Table 232. VRG Controls Major Business
- Table 233. VRG Controls Digital Positioner Product and Services
- Table 234. VRG Controls Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 235. VRG Controls Recent Developments/Updates
- Table 236. VRG Controls Competitive Strengths & Weaknesses
- Table 237. Wuzhong Instrument Basic Information, Manufacturing Base and Competitors
- Table 238. Wuzhong Instrument Major Business
- Table 239. Wuzhong Instrument Digital Positioner Product and Services
- Table 240. Wuzhong Instrument Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 241. Wuzhong Instrument Recent Developments/Updates
- Table 242. Wuzhong Instrument Competitive Strengths & Weaknesses
- Table 243. North Photoelectric Basic Information, Manufacturing Base and Competitors
- Table 244. North Photoelectric Major Business
- Table 245. North Photoelectric Digital Positioner Product and Services
- Table 246. North Photoelectric Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 247. North Photoelectric Recent Developments/Updates
- Table 248. North Photoelectric Competitive Strengths & Weaknesses
- Table 249. Suzhou Yingchuang Intelligent Basic Information, Manufacturing Base and Competitors
- Table 250. Suzhou Yingchuang Intelligent Major Business
- Table 251. Suzhou Yingchuang Intelligent Digital Positioner Product and Services
- Table 252. Suzhou Yingchuang Intelligent Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 253. Suzhou Yingchuang Intelligent Recent Developments/Updates
- Table 254. Suzhou Yingchuang Intelligent Competitive Strengths & Weaknesses
- Table 255. POWERFLOW Basic Information, Manufacturing Base and Competitors
- Table 256. POWERFLOW Major Business
- Table 257. POWERFLOW Digital Positioner Product and Services

Table 258. POWERFLOW Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 259. POWERFLOW Recent Developments/Updates

Table 260. POWERFLOW Competitive Strengths & Weaknesses

Table 261. Shenzhen MORC Controls Basic Information, Manufacturing Base and Competitors

Table 262. Shenzhen MORC Controls Major Business

Table 263. Shenzhen MORC Controls Digital Positioner Product and Services

Table 264. Shenzhen MORC Controls Digital Positioner Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 265. Shenzhen MORC Controls Recent Developments/Updates

Table 266. Shenzhen MORC Controls Competitive Strengths & Weaknesses

Table 267. Global Key Players of Digital Positioner Upstream (Raw Materials)

Table 268. Global Digital Positioner Typical Customers

Table 269. Digital Positioner Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Digital Positioner Picture

Figure 2. World Digital Positioner Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Digital Positioner Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Digital Positioner Production (2021-2032) & (K Units)

Figure 5. World Digital Positioner Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Digital Positioner Production Value Market Share by Region (2021-2032)

Figure 7. World Digital Positioner Production Market Share by Region (2021-2032)

Figure 8. North America Digital Positioner Production (2021-2032) & (K Units)

Figure 9. Europe Digital Positioner Production (2021-2032) & (K Units)

Figure 10. China Digital Positioner Production (2021-2032) & (K Units)

Figure 11. Japan Digital Positioner Production (2021-2032) & (K Units)

Figure 12. South Korea Digital Positioner Production (2021-2032) & (K Units)

Figure 13. Digital Positioner Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Digital Positioner Consumption (2021-2032) & (K Units)

Figure 16. World Digital Positioner Consumption Market Share by Region (2021-2032)

Figure 17. United States Digital Positioner Consumption (2021-2032) & (K Units)

Figure 18. China Digital Positioner Consumption (2021-2032) & (K Units)

Figure 19. Europe Digital Positioner Consumption (2021-2032) & (K Units)

Figure 20. Japan Digital Positioner Consumption (2021-2032) & (K Units)

Figure 21. South Korea Digital Positioner Consumption (2021-2032) & (K Units)

Figure 22. ASEAN Digital Positioner Consumption (2021-2032) & (K Units)

Figure 23. India Digital Positioner Consumption (2021-2032) & (K Units)

Figure 24. Producer Shipments of Digital Positioner by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Digital Positioner Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Digital Positioner Markets in 2025

Figure 27. United States VS China: Digital Positioner Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Digital Positioner Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Digital Positioner Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Digital Positioner Production Market Share 2025

Figure 31. China Based Manufacturers Digital Positioner Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Digital Positioner Production Market Share 2025

Figure 33. World Digital Positioner Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Digital Positioner Production Value Market Share by Type in 2025

Figure 35. Single Acting Positioners

Figure 36. Double Acting Positioners

Figure 37. World Digital Positioner Production Market Share by Type (2021-2032)

Figure 38. World Digital Positioner Production Value Market Share by Type (2021-2032)

Figure 39. World Digital Positioner Average Price by Type (2021-2032) & (US\$/Unit)

Figure 40. World Digital Positioner Production Value by Actuator Type, (USD Million), 2021 & 2025 & 2032

Figure 41. World Digital Positioner Production Value Market Share by Actuator Type in 2025

Figure 42. Linear Positioners

Figure 43. Rotary Positioners

Figure 44. World Digital Positioner Production Market Share by Actuator Type (2021-2032)

Figure 45. World Digital Positioner Production Value Market Share by Actuator Type (2021-2032)

Figure 46. World Digital Positioner Average Price by Actuator Type (2021-2032) & (US\$/Unit)

Figure 47. World Digital Positioner Production Value by Explosion-proof, (USD Million), 2021 & 2025 & 2032

Figure 48. World Digital Positioner Production Value Market Share by Explosion-proof in 2025

Figure 49. Non-explosion-proof Type

Figure 50. Explosion-proof Type

Figure 51. World Digital Positioner Production Market Share by Explosion-proof (2021-2032)

Figure 52. World Digital Positioner Production Value Market Share by Explosion-proof (2021-2032)

Figure 53. World Digital Positioner Average Price by Explosion-proof (2021-2032) & (US\$/Unit)

Figure 54. World Digital Positioner Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World Digital Positioner Production Value Market Share by Application in 2025

Figure 56. Oil, Gas & Petrochemical

Figure 57. Chemical

Figure 58. Power Industry

Figure 59. Metals & Metallurgy

Figure 60. Paper & Pulp

Figure 61. Pharmaceutical

Figure 62. Food & Beverages

Figure 63. Others

Figure 64. Others

Figure 65. World Digital Positioner Production Market Share by Application (2021-2032)

Figure 66. World Digital Positioner Production Value Market Share by Application (2021-2032)

Figure 67. World Digital Positioner Average Price by Application (2021-2032) & (US\$/Unit)

Figure 68. Digital Positioner Industry Chain

Figure 69. Digital Positioner Procurement Model

Figure 70. Digital Positioner Sales Model

Figure 71. Digital Positioner Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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