

Global Industrial Automation Control PLC Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Industrial Automation Control PLC market size was valued at US\$ 13368 million in 2025 and is forecast to a readjusted size of US\$ 25557 million by 2032 with a CAGR of 9.5% during review period.

Industrial Automation Control PLC is an industrial digital controller designed to execute deterministic logic, sequence control, timing, counting, arithmetic, interlocking, motion coordination, safety-related control, and equipment automation tasks in manufacturing and process environments. The product combines a processor and programmable memory with industrial communication interfaces and, depending on configuration, integrated or expandable digital and analog I/O. This study focuses on physical PLC controller hardware supplied as compact/integrated, modular, or rack-mounted platforms, spanning nano/micro through large-capacity PLCs and covering general-purpose logic PLCs, integrated-motion PLCs, safety PLCs, and redundant high-availability PLCs. Industrial Automation Control PLC is typically connected to sensors, actuators, drives, servo systems, HMI devices, industrial networks, and supervisory systems to provide real-time machine and production-process control. Major applications include automotive and EV production, general manufacturing machinery, electronics and semiconductor equipment, energy and utility control, oil, gas and chemical processing, and food, beverage and pharmaceutical production.

Key Findings

Compact and modular PLC architectures remain the core product forms for

machine-level and production-line automation

Integrated motion, functional safety, Ethernet networking, and data transparency are increasingly important PLC value differentiators

Asia-Pacific represents the principal demand region, supported by its concentration of global manufacturing and automation equipment production

PLC development is shifting toward higher computing performance, tighter functional integration, and stronger industrial cybersecurity

New-generation controller platforms from major suppliers are accelerating modernization of installed automation architectures

Market Trends

Industrial Automation Control PLC is evolving from a dedicated logic controller toward a more integrated machine-control platform combining deterministic sequence control with motion, safety, industrial Ethernet, diagnostics, data exchange, and increasingly sophisticated system-integration capabilities. Compact controllers are gaining functions that were previously concentrated in larger modular platforms: Siemens positions the SIMATIC S7-1200 G2 for basic automation with motion control, machine safety, improved communication and data transparency, while Inovance's H5U integrates EtherCAT for multi-axis applications. At the higher end, Rockwell Automation's ControlLogix 5590 emphasizes increased memory, motion capability, functional safety and scalability, while Mitsubishi Electric's MELSEC MX platform reflects a shift toward deeper integration of control functions and simplified engineering. Another important trend is the growing role of software engineering and lifecycle compatibility in PLC selection. Hardware performance remains essential, but users increasingly evaluate programming productivity, reusable engineering assets, controller-to-drive integration, diagnostics, remote maintenance, cybersecurity and migration paths from installed PLC generations. As a result, competition is moving from individual CPU specifications toward complete automation ecosystems in which controller hardware, I/O, motion, safety, communication and engineering environments operate as a unified platform.

Market Dynamics

Drivers

Growth in Industrial Automation Control PLC demand is primarily supported by continued factory automation, production-line modernization, labor-productivity requirements and digital transformation across discrete and hybrid manufacturing. PLCs remain the deterministic control layer for machines and equipment even as factories add higher-level analytics, AI and manufacturing software. UNIDO's recent industrial statistics continue to show manufacturing expansion and increasing influence of automation on production structures, while manufacturers are continuing to prioritize digital transformation and smart-manufacturing investment. Demand is particularly supported by automation-intensive sectors such as automotive and EV production, electronics manufacturing, semiconductor equipment, packaging, material handling, food processing and industrial infrastructure, where growing machine complexity requires higher I/O density, faster communication and stronger synchronization with drives, servo systems and safety devices.

Restraints

The Industrial Automation Control PLC market is constrained by long installed-equipment lifecycles, high switching costs associated with established controller ecosystems and strong price competition in small and medium PLC categories. Replacing a PLC platform often requires more than exchanging a controller: users may need to migrate application code, validate I/O behavior, replace communication modules, update HMI projects, retrain engineers and requalify equipment. Siemens' migration planning for the S7-1200 generation illustrates the importance of lifecycle transition in industrial control platforms. In mature markets, this installed-base inertia can slow adoption of new controller families even when newer hardware offers substantial performance improvements. At the lower end, increasing integration of communication, motion and I/O functions into compact products intensifies price-performance competition, placing pressure on suppliers that lack scale, proprietary engineering software or established automation channels.

Opportunities

Major opportunities are emerging from integrated motion PLCs, safety PLCs, redundant high-availability control, compact EtherCAT-based machine controllers and controller modernization in existing factories. Machine builders increasingly seek to reduce cabinet size and engineering complexity by consolidating logic, motion, networking and

selected safety functions onto fewer controller platforms. Inovance's H5U targets multi-axis EtherCAT machine applications, ABB integrates control and safety within the AC500 family, and Emerson introduced a PACSystems safety controller for SIL2 applications in 2025. Brownfield modernization represents another large opportunity because aging controllers and I/O systems must gradually be replaced without disrupting existing machine logic or plant operation. Emerging manufacturing investment in Asia also creates opportunities for suppliers that can combine competitive hardware pricing with local engineering support, industrial-network compatibility and complete drive-motion-control portfolios.

Challenges

Cybersecurity has become a structural challenge for Industrial Automation Control PLC because controllers that were historically isolated are increasingly connected to plant Ethernet networks, remote engineering environments and higher-level production systems. ISA/IEC 62443 establishes security requirements and processes for industrial automation and control systems, and major PLC suppliers are increasingly implementing secure-development practices, authentication, secure communications and vulnerability-management processes. ABB states that its AC500 development processes and security capabilities are aligned with IEC 62443 requirements, while Siemens similarly applies defense-in-depth principles to industrial cybersecurity. Suppliers must also balance stronger connectivity with deterministic operation, functional safety, backward compatibility and long product lifecycles. Additional challenges include maintaining support for multiple industrial communication standards, securing semiconductor and electronic-component supply, managing product obsolescence and competing with PAC, software-defined control and PC-based automation technologies without weakening the reliability advantages traditionally associated with PLC hardware.

Industry Chain Analysis

The upstream Industrial Automation Control PLC industry chain consists primarily of industrial microprocessors and system-on-chip devices, memory, communication ICs, analog and digital interface components, power-management devices, isolation components, printed circuit boards, connectors, industrial enclosures and related electronic components. PLC manufacturers integrate these elements into CPUs and compact controllers and develop firmware, real-time execution environments, industrial

communication stacks, diagnostics and engineering interfaces. In modular and rack-mounted platforms, the controller works within an ecosystem of digital I/O, analog I/O, communication, positioning, safety and specialty modules. Current product architectures demonstrate that the value of a PLC platform increasingly lies not only in CPU hardware but also in communication performance, cybersecurity, engineering software, scalable I/O and integration with motion and safety functions.

Downstream demand originates from machine builders, automation equipment manufacturers, production plants, process facilities and infrastructure operators. PLCs receive field signals from sensors and other input devices, execute control logic in deterministic cycles and command actuators, drives, valves, motors and production equipment. Value creation therefore depends heavily on reliability, cycle time, I/O scalability, communication compatibility, engineering efficiency, lifecycle support and availability of regional technical services. Once a machine builder standardizes a controller platform, application code, engineering libraries, I/O architecture, drive interfaces and maintenance knowledge create significant ecosystem attachment, making installed-base compatibility a major competitive asset for established suppliers.

Segment Insights

By hardware architecture, compact/integrated PLCs serve cost-sensitive standalone machinery and smaller automation systems by combining CPU, power supply, communications and a defined number of I/O points in a compact package. Modular PLCs address the broad middle of the market, allowing users to expand I/O, communications, positioning and specialty functions as equipment requirements change. Rack-mounted PLCs are concentrated in large production systems, high-I/O applications, redundant architectures and complex plant-level automation where scalability and availability justify higher system value. Mainstream suppliers increasingly offer overlapping performance between these architectures, with compact PLCs acquiring Ethernet, motion and safety functions that historically required larger modular systems.

By I/O capacity, nano/micro PLCs with up to 32 I/O points primarily address small machines and localized equipment control; small PLCs with 33–128 I/O points are widely suited to packaging, material handling and standalone production equipment; medium PLCs with 129–1024 I/O points support more complex machines and production cells; and large PLCs above 1024 I/O points serve extensive production lines and high-availability applications. From a value perspective, general-purpose logic

PLCs form the broad installed base, while integrated-motion, safety and redundant high-availability PLCs command higher system value because of their processing performance, specialized firmware, certifications and architecture requirements. Rockwell, ABB and Emerson all position higher-end controller families around combinations of motion, safety, process or high-availability functionality.

Downstream Market Opportunities

Automotive and EV production remains one of the most automation-intensive opportunities for Industrial Automation Control PLC, with PLCs deployed across welding, assembly, painting, conveyance, battery manufacturing and component production. General industrial machinery represents a broader volume opportunity across machine tools, packaging, assembly, textile, plastics and material-handling equipment. Electronics and semiconductor manufacturing require increasingly precise synchronization between controllers, motion systems, vision, robotics and high-speed I/O, supporting demand for faster PLCs and integrated industrial networks. Energy, utilities, oil and gas, chemicals, food and beverage, and pharmaceuticals provide additional opportunities where control reliability, redundancy, traceability, safety and long lifecycle support have higher importance. The strongest incremental opportunities are increasingly associated with automation upgrades, machine connectivity and replacement of legacy controller platforms rather than purely greenfield installations.

Regional Insights

Asia-Pacific is the principal market for Industrial Automation Control PLC, supported by the region's scale in manufacturing, industrial machinery, electronics, automotive, batteries and factory automation. UNIDO's manufacturing statistics continue to show the major role of Asia in global industrial activity, while China, Japan and other Asian manufacturing economies maintain extensive automation-equipment ecosystems. China combines a very large domestic machinery market with rapidly improving local control-system capability, supporting suppliers such as Shenzhen Inovance Technology Co., Ltd., Beijing HollySys Intelligent Technologies Co., Ltd. and Shenzhen Megmeet Electrical Co., Ltd. alongside established multinational platforms. Japan remains a major technology and production center for PLCs, with strong participation from Mitsubishi Electric, OMRON, KEYENCE, Panasonic Industry, Hitachi Industrial Equipment Systems, Fuji Electric and JTEKT. South Korea and China Taiwan add further regional depth through LS ELECTRIC and Delta Electronics.

Europe and North America remain high-value PLC markets characterized by large installed bases, mature automation practices and substantial replacement demand. Europe benefits from strong machinery, automotive, process-industry and electrical-automation ecosystems centered around suppliers such as Siemens, Schneider Electric and ABB. North America is strongly influenced by Rockwell Automation's Allen-Bradley installed base, while Emerson maintains a significant position in industrial and process-oriented control. Mature-market demand increasingly emphasizes cybersecurity, functional safety, controller migration, high availability and integration with plant-wide information architectures. Emerging manufacturing regions in Southeast Asia, India and other developing industrial markets offer longer-term volume opportunities as factories expand automation intensity and machine builders seek controller platforms combining competitive cost with broad protocol and engineering support.

Competitive Landscape Analysis

The Industrial Automation Control PLC market has a tiered competitive structure combining global automation-platform leaders, Japanese factory-automation specialists and rapidly developing Asian regional suppliers. Siemens, Rockwell Automation, Mitsubishi Electric and Schneider Electric occupy particularly strong positions through large installed bases, scalable controller portfolios, integrated engineering environments and broad global channels, while OMRON, ABB, Emerson and KEYENCE compete with strong machine-control, process, safety or high-performance automation capabilities. Delta Electronics, Shenzhen Inovance Technology Co., Ltd., Panasonic Industry, Hitachi Industrial Equipment Systems, Fuji Electric, LS ELECTRIC, Toshiba International, JTEKT, Beijing HollySys Intelligent Technologies Co., Ltd. and Shenzhen Megmeet Electrical Co., Ltd. provide important regional and application-specific competition. Competitive differentiation is increasingly shifting toward platform renewal and functional integration. Siemens is transitioning its compact-control portfolio toward SIMATIC S7-1200 G2 with higher performance, motion, safety and connectivity; Rockwell Automation introduced ControlLogix 5590 in October 2025 with substantially expanded memory, motion capacity and functional-safety capabilities; Mitsubishi Electric released its MELSEC MX Controller platform in 2025 to deepen integration and simplify automation engineering. At the same time, ABB is emphasizing cybersecurity and integrated safety within AC500, Emerson has expanded its PACSystems safety capability, and Chinese suppliers are improving motion-control and industrial-network integration. As controller hardware performance converges, long-term competitive advantage increasingly depends on installed-base migration, engineering productivity,

industrial protocol compatibility, controller-drive-motion integration, cybersecurity, lifecycle availability and global or regional technical-support capability rather than CPU specifications alone.

Report Scope

This report is a detailed and comprehensive analysis for global Industrial Automation Control PLC market. Both quantitative and qualitative analyses are presented by company, by region & country, by Hardware Architecture Types and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Industrial Automation Control PLC market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Industrial Automation Control PLC market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Industrial Automation Control PLC market size and forecasts, by Hardware Architecture Types and by Application, in consumption value (\$ Million), 2021-2032

Global Industrial Automation Control PLC market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Industrial Automation Control PLC

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Industrial Automation Control PLC market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Siemens AG, Rockwell Automation, Inc., Mitsubishi Electric Corporation, Schneider Electric SE, OMRON Corporation, ABB Ltd, Emerson Electric Co., KEYENCE CORPORATION, Delta Electronics, Inc., Shenzhen Inovance Technology Co., Ltd., etc.

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

Industrial Automation Control PLC market is split by Hardware Architecture Types and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Hardware Architecture Types and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Hardware Architecture Types

Compact/Integrated PLCs

Modular PLCs

Rack-Mounted PLCs

Market segment by I/O Capacity Types

Nano/Micro PLCs (?32 I/O Points)

Small PLCs (33–128 I/O Points)

Medium PLCs (129–1024 I/O Points)

Large PLCs (>1024 I/O Points)

Market segment by Control Function Configuration Types

General-Purpose PLCs (Logic and Sequence Control)

Integrated Motion PLCs (Logic and Multi-Axis Motion Control)

Safety PLCs (Safety-Certified Control)

Redundant High-Availability PLCs (Redundant CPU and System Architecture)

Market segment by Application

Automotive and EV Manufacturing Lines (Body Welding, Assembly, Painting, and Battery Production)

General Manufacturing Machinery and Production Lines (Machine Tools, Packaging, Assembly, and Material Handling)

Electronics and Semiconductor Manufacturing Equipment (SMT, Assembly, Wafer Processing, and Packaging)

Energy and Utility Control Systems (Power Generation, Substations, Renewable Energy, and Distribution)

Oil, Gas, and Chemical Process Automation (Processing Units, Pumps, Compressors, and Material Handling)

Food, Beverage, and Pharmaceutical Processing Lines (Mixing, Filling, Packaging, and Process Control)

Others

Market segment by players, this report covers

Siemens AG

Rockwell Automation, Inc.

Mitsubishi Electric Corporation

Schneider Electric SE

OMRON Corporation

ABB Ltd

Emerson Electric Co.

KEYENCE CORPORATION

Delta Electronics, Inc.

Shenzhen Inovance Technology Co., Ltd.

Panasonic Industry Co., Ltd.

Hitachi Industrial Equipment Systems Co., Ltd.

Fuji Electric Co., Ltd.

Toshiba International Corporation

JTEKT CORPORATION

Beijing HollySys Intelligent Technologies Co., Ltd.

Shenzhen Megmeet Electrical Co., Ltd.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Industrial Automation Control PLC product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Industrial Automation Control PLC, with revenue, gross margin, and global market share of Industrial Automation Control PLC from 2021 to 2026.

Chapter 3, the Industrial Automation Control PLC competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Hardware Architecture Types and by Application, with consumption value and growth rate by Hardware Architecture Types, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Industrial Automation Control PLC market forecast, by regions, by Hardware Architecture Types and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Industrial

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Chapter 13, to describe Industrial Automation Control PLC research findings and conclusion.

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