

# **Programmable Logic Controller (PLC) Market Report by Type (Hardware and Software, Services), End Use Industry (Automotive, Energy and Utilities, Chemical and Petrochemical, Oil and Gas, Pulp and Paper, Pharmaceutical, Water and Wastewater Treatment, Food, Tobacco and Beverage, and Others), and Region 2024-2032**

<https://marketpublishers.com/r/PA547FD1C38BEN.html>

Date: March 2024

Pages: 139

Price: US\$ 3,899.00 (Single User License)

ID: PA547FD1C38BEN

## **Abstracts**

The global programmable logic controller (PLC) market size reached US\$ 15.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 24.1 Billion by 2032, exhibiting a growth rate (CAGR) of 4.91% during 2024-2032. The increasing adoption of Industry 4.0 principles, the rising emphasis on energy conservation and sustainability, the growing need for resilient and agile manufacturing processes, the escalating labor costs in various regions, and the rapid advancements in PLC technology are some of the factors propelling the market.

A programmable logic controller (PLC) is vital in industrial automation, revolutionizing manufacturing and process control. PLCs are rugged, microprocessor-based devices that monitor inputs, make decisions, and control outputs in real-time. They excel in repetitive, high-speed tasks, enhancing efficiency and precision. They consist of three main components: the CPU, input modules, and output modules. The CPU processes data and executes control algorithms, while input modules collect data from sensors and switches. Based on the CPU's instructions, output modules actuate devices like motors and valves. PLCs are versatile, with various programming languages, including ladder logic, structured text, and function block diagrams. They are highly reliable, with built-in redundancy and fault tolerance features. Additionally, they enable remote monitoring and troubleshooting, reducing downtime. In manufacturing, energy, and

automotive industries, PLCs play a pivotal role in achieving automation, ensuring consistency, safety, and cost-effectiveness. Their adaptability and robustness make them indispensable in modern industrial settings.

The global PLC market is majorly driven by the relentless push for automation across industries like manufacturing, energy, and process control. These devices streamline operations, improve efficiency, and reduce labor costs, making them essential to modern industrial processes. Furthermore, the increasing need for real-time data analysis and remote monitoring capabilities fuels PLC adoption. PLCs are increasingly equipped with advanced communication protocols and connectivity options, enabling seamless integration into the Industrial Internet of Things (IIoT) ecosystem. This connectivity empowers industries to collect, analyze, and act upon data, enhancing decision-making and predictive maintenance. Besides, the rising regulatory landscape emphasizing safety standards and environmental compliance is bolstering the PLC market. Additionally, the rapid innovations in PLC technology, including improved hardware capabilities, more user-friendly software interfaces, and enhanced cybersecurity features, are attracting a broader user base. As PLCs become more adaptable, reliable, and secure, they continue to be a cornerstone of industrial automation, propelling the PLC market.

**Programmable Logic Controller (PLC) Market Trends/Drivers:**  
Increasing demand for industrial automation across the globe

The increasing demand for industrial automation worldwide is supporting the PLC market growth. Industries spanning manufacturing, automotive, pharmaceuticals, and more actively seek ways to enhance operational efficiency, reduce costs, and ensure consistent quality. This quest for optimization has led to an increased appetite for automation solutions, with PLCs at the forefront. Industrial automation improves productivity and enhances safety by minimizing human intervention in hazardous environments. Additionally, it allows for precise control over processes, leading to higher product quality and reduced waste. Furthermore, the global competition and the need for quicker response times in today's business landscape necessitate automation. PLCs provide the agility to adapt to changing market dynamics and efficiently scale production. As industries worldwide continue to recognize the advantages of industrial automation, the demand for PLCs as a fundamental automation tool will persistently drive the growth of the PLC market, making it an essential player in modern industrialization.

**Significant growth in the automotive industry**

The significant growth in the automotive industry is creating a positive outlook for the market. The shift towards electric and hybrid vehicles is a key driver. As environmental concerns rise and governments promote EV adoption, automotive companies invest heavily in EV technology and production. The integration of ADAS features, such as autonomous driving capabilities and safety enhancements, fosters innovation and attracts investments from traditional automakers and tech companies. The automotive industry's global nature has led to cross-border collaborations and the opening of new markets, further accelerating growth. Sustainability is a top priority, leading to the development of eco-friendly manufacturing processes and materials and recycling initiatives. Increasing consumer demand for connectivity, infotainment, and comfort features drives continuous innovation and vehicle technology upgrades. Recent disruptions have pushed the industry to prioritize resilient and flexible supply chains, prompting investments in automation and digitalization.

Rising implementation of various government initiatives focusing on the sustainable construction of smart cities

The rising implementation of government initiatives focusing on the sustainable construction of smart cities offers numerous market opportunities. As smart cities aim to optimize resource utilization, energy efficiency, and infrastructure management, PLCs are pivotal in automating and controlling various systems. They enable smart grids for efficient energy distribution, manage traffic and public transportation systems, and monitor environmental parameters. Moreover, PLCs ensure real-time data collection and processing for enhanced decision-making in complex urban environments. The demand for PLCs is increasing, as they are fundamental to smart city projects' functionality, efficiency, and sustainability. This trend is set to propel the PLC market further as more cities and governments embrace the vision of intelligent and sustainable urban development.

Programmable Logic Controller (PLC) Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global programmable logic controller (PLC) market report, along with forecasts at the global, regional and country levels for 2024-2032. Our report has categorized the market based on type and end use industry.

Breakup by Type:

Hardware and Software

Large PLC  
Nano PLC  
Small PLC  
Medium PLC  
Others  
Services

Hardware and software dominate the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes hardware and software (large PLC, nano PLC, small PLC, medium PLC, and others) and services. According to the report, hardware and software represented the largest segment.

The availability of various PLC sizes and types ensures a wide range of industrial applications can be addressed. Large PLCs are suitable for complex and extensive systems, while Nano and Small PLCs are ideal for compact machinery and localized automation, expanding the PLC's footprint across industries. Different industries have unique requirements, and the segmentation allows for customization. Medium-sized PLCs, for example, offer a balance between versatility and capability, appealing to a broad spectrum of applications.

Furthermore, nano and small PLCs are cost-effective solutions for small to mid-sized enterprises, making automation accessible to a wider range of businesses. This affordability encourages adoption and drives market growth. Continuous innovation in hardware and software segments results in more powerful, energy-efficient, and reliable PLCs. This motivates industries to upgrade their automation systems, further fueling market growth.

Moreover, the hardware and software segmentation enables scalability in automation solutions. Companies can start with smaller PLCs and expand as their operations grow, ensuring a future-ready approach. Several manufacturers are tapping into global markets by offering a variety of PLC sizes and functionalities, making them adaptable to different regional needs and regulatory requirements. This diversity is a significant driver behind the sustained growth of the programmable logic controller (PLC) market.

Breakup by End Use Industry:

Automotive

Energy and Utilities  
Chemical and Petrochemical  
Oil and Gas  
Pulp and Paper  
Pharmaceutical  
Water and Wastewater Treatment  
Food, Tobacco and Beverage  
Others

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes automotive, energy and utilities, chemical and petrochemical, oil and gas, pulp and paper, pharmaceutical, water and wastewater treatment, food, tobacco and beverage, and others.

PLCs are indispensable in the automotive industry, facilitating precision manufacturing processes, quality control, and automation of assembly lines. As the automotive sector embraces automation and advances in electric and autonomous vehicle technologies, the demand for PLCs continues to rise. They ensure efficient production, reduce downtime, and enhance vehicle safety by integrating sophisticated control systems. Moreover, the increasing adoption of electric vehicles necessitates PLCs for battery management, charging infrastructure, and vehicle control systems, contributing significantly to market expansion.

Furthermore, they are at the core of energy management and grid automation in the energy and utilities sector. They enable the seamless operation of power generation, distribution, and monitoring systems. As the world shifts towards renewable energy sources and grid modernization, the demand for PLCs to manage and optimize complex energy networks grows substantially. They also enhance the efficiency of water treatment plants, optimizing resource utilization in Utilities. Moreover, as sustainability initiatives become paramount, PLCs help utilities minimize energy wastage, reduce environmental impact, and meet stringent regulatory requirements. This specialized application and the continual advancements in automation further fuel the growth of the programmable logic controller (PLC) market.

Breakup by Region:

North America  
United States  
Canada  
Asia-Pacific

China  
Japan  
India  
South Korea  
Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

Asia Pacific is home to some of the world's fastest-growing economies, including China, India, and other Southeast Asian nations. These economies are experiencing rapid industrialization and urbanization, necessitating extensive automation across various sectors. PLCs are instrumental in enhancing manufacturing efficiency, infrastructure development, and energy management, aligning with the region's economic ambitions. Furthermore, the region has emerged as a global manufacturing powerhouse. PLCs are vital in modern manufacturing processes, offering precision, scalability, and adaptability. The region's electronics, automotive, and consumer goods dominance drives substantial demand for PLCs.

Governments in Asia Pacific are investing heavily in infrastructure projects, including smart cities, transportation networks, and energy grids. PLCs are fundamental to these projects' automation and control systems, fostering significant market growth. Moreover, the region is also witnessing a rise in renewable energy projects, with countries like China and India leading the way. PLCs are essential for efficiently operating and integrating renewable energy sources, such as solar and wind, into the grid. Besides established markets like China, emerging economies in Southeast Asia are increasingly adopting automation technologies. The growing awareness of the benefits of PLCs in terms of productivity and cost savings fuels market expansion.

#### Competitive Landscape:

Top companies actively contribute to the market's growth and innovation in several ways. They invest heavily in research and development, constantly improving PLC hardware and software to meet evolving industrial needs. This commitment to innovation leads to more capable and efficient PLC systems. Furthermore, these companies focus on global expansion, ensuring their products reach various industries and regions. Moreover, top manufacturers prioritize cybersecurity in their products, addressing growing concerns about industrial system vulnerabilities. They integrate robust security features and protocols to safeguard critical infrastructure against cyber threats. Additionally, these companies offer comprehensive support and services, including training and technical assistance, making it easier for businesses to integrate and maintain PLC systems effectively. Besides, they foster partnerships and collaborations with other technology providers, enabling seamless integration with emerging technologies like the Industrial Internet of Things (IIoT) and artificial intelligence, further enhancing the PLC's capabilities.

The report has provided a comprehensive analysis of the competitive landscape in the PLC market. Detailed profiles of all major companies have also been provided.

ABB Ltd.  
Delta Electronics Inc.  
Eaton Corporation plc  
Emerson Electric Co.  
Fuji Electric Co. Ltd.  
Hitachi Ltd  
Honeywell International Inc.  
Mitsubishi Electric Corporation  
OMRON Corporation

Panasonic Holdings Corporation  
Robert Bosch GmbH  
Rockwell Automation Inc.  
Schneider Electric SE  
Siemens AG  
Toshiba Corporation

#### Recent Developments:

In September 2023, ABB Ltd announced to invest in a strategic partnership with a clean energy start-up to offer an end-to-end wind energy portfolio.

In June 2023, Delta Electronics, Inc., a prominent global power and thermal management solutions provider, officially revealed its acquisition agreement. Through its subsidiary, Delta International Holding Limited BV, they will acquire full ownership, totaling 100% shareholdings, of HY&T Investments Holding BV and its affiliated companies, including TB&C Group. These businesses specialize in automotive high-voltage hybrid components. The acquisition is valued at 142 million euros, approximately equivalent to NT\$ 4,661,860 thousand.

In September 2023, Eaton Corporation plc announced to invest \$150 Million to increase the production of vital electrical infrastructure for North American businesses and communities.

#### Key Questions Answered in This Report

1. What was the size of the global Programmable Logic Controller (PLC) market in 2023?
2. What is the expected growth rate of the global Programmable Logic Controller (PLC) market during 2024-2032?
3. What are the key factors driving the global Programmable Logic Controller (PLC) market?
4. What has been the impact of COVID-19 on the global Programmable Logic Controller (PLC) market?
5. What is the breakup of the global Programmable Logic Controller (PLC) market based on the type?
6. What are the key regions in the global Programmable Logic Controller (PLC) market?
7. Who are the key players/companies in the global Programmable Logic Controller (PLC) market?



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