

Global Advanced Process Control Market (2019-2025)

<https://marketpublishers.com/r/GC8D9ABAF8AAEN.html>

Date: October 2019

Pages: 278

Price: US\$ 3,600.00 (Single User License)

ID: GC8D9ABAF8AAEN

Abstracts

The Global Advanced Process Control Market size is expected to reach \$24.2 billion by 2025, rising at a market growth of 9.4% CAGR during the forecast period. The increasing complexity of technology and developments in computer hardware, networking technology, operating systems, programming tools and languages, and database technology encourage suppliers to develop products. These also help suppliers to simplify their solutions to meet end user requirements. Moreover, the Cloud and the Internet are fundamentally changing the use and deployment of these technologies, thereby influencing how the business of digital optimization is carried out. Balancing these competitive market forces creates both suppliers and end-users uncertainty.

Advanced process control (APC) and online optimization technologies have been used by process manufacturers for the last few years. On the market front, improvements have been initiated, increasing the needs of manufacturers to optimize systems in open computing platforms, and robust plant representation. As such, one of their most challenging issues is to deploy and sustain assets with minimal human resources efficiently. This way plants can respond effectively to new opportunities without compromising quality or profitability.

Based on Application, the market is segmented into Hardware, Software and Services. Hardware segment is further bifurcated into Control Systems, Interface & Display, Computing Systems and Others. Based on End User, the market is segmented into Oil & Gas, Chemicals, Food & Beverages, Energy & Power, Mining & Minerals, and Metals, Pharmaceuticals and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa. The Europe advanced processing control market recorded more than 30% market share in 2018. The market share was enabled by the high adoption rate of APC systems in the chemical, pulp and paper, pharmaceuticals, and oil & gas industries in Europe. In

In addition, chemical manufacturers make significant investments in developing and customizing APC systems to improve their operating processes. Due to ongoing technological advances like automation in processing industries and deployment of APC in hydraulic fracturing of shale gas formation, the North America's advanced process control market follows the European market.

The major strategies followed by the market participants are Product launches and Partnerships & Collaborations. Based on the Analysis presented in the Cardinal matrix, Schneider Electric SE, ABB Group, Emerson Electric Co., Panasonic Corporation, Honeywell International, Inc., General Electric (GE) Co., Siemens AG are some of the forerunners in the Advanced Process Control Market. The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include ABB Group, Emerson Electric Co., General Electric (GE) Co., Honeywell International, Inc., Schneider Electric SE, Siemens AG, Panasonic Corporation, Yokogawa Electric Corporation, Rudolph Technologies, Inc. and Rockwell Automation, Inc.

Recent strategies deployed in Advanced Process Control Market

Collaboration, Partnerships and Agreements:

Jul-2019: General Electric teamed up with Schneider Electric in order to establish 4 power control systems in Egypt for implementation of control system and communication network with the aim to improve the operational efficiency.

May-2019: Siemens signed a contract with HafslundNett in order to supply new Advanced Distribution Management System which supplies power control system in Norway.

Apr-2019: Yokogawa launched FAST/TOOLS R10.04, real-time operations management and visualization software for adding it into OpreX™ Control and Safety System family in order to help the customers in deriving maximum value from their investments over the entire system lifecycle.

Mar-2019: Yokogawa expanded its reach to Norway by establishing a new subsidiary in order to sale control products and provision of related services.

Dec-2018: General Electric announced its collaboration with CyberX in order to generate new ways of securing manufacturing industrial controls.

Sep-2018: Schneider Electric came into partnership with Scale Computing in order to deliver Micro Data Center in a Box solution to North America for realizing the benefits of storage and computing capacities to the edge.

Jul-2018: ABB collaborated with Actemium in order to implement digital solutions in

manufacturing execution systems and distributed control systems.

Jul-2018: Siemens collaborated with Boeing in which Boeing will implement new automation solutions aimed at developing automation standards in order to make its systems easier and efficient.

Jun-2018: Siemens signed an agreement with Sartorius in which Sartorius will use Siemens automation technologies such as industrial PCs, the S7-1500 software controller, the TIA Portal, and the SCADA system Simatic WinCC in order to develop and manufacture biopharmaceuticals.

Feb-2018: Emerson extended its Plantweb™ digital ecosystem by adding DeltaV version 14, a cybersecurity-certified control system in order to make plant operations connected and productive.

Feb-2018: Siemens extended its Simatic automation controller series for PC-based applications by adding Simatic ET 200SP Open Controller CPU 1515SP PC 2 to it in order to perform standard and fail-safe automation tasks upto performance level in a single device.

Feb-2018: Panasonic came into partnership with Trend Micro in order to develop solutions for detecting and preventing intrusions into Electronic Control Units (ECUs) which controls the driving behavior.

Acquisition and Mergers:

Oct-2019: Rockwell Automation acquired MESTECH Services in which MESTECH will be able to use Rockwell's products and solutions in the areas of process, control and power information solutions.

Jun-2019: Rudolph signed the merger agreement with Nanometrics in order to establish a premier semiconductor process control company.

May-2019: Schneider Electric took over AutoGrid in order to enhance its position in edge control software and analytics.

Feb-2019: Emerson took over Intelligent Platforms from General Electric in order to enhance its automation for industrial and process customers for increasing its capabilities in machine control.

Jan-2019: Rockwell Automation took over Emulate3D in order to improve system planning and decision making.

Jul-2018: ABB acquired GE Industrial Solutions in order to strengthen its position in electrification.

May-2018: Schneider Electric took over Larsen & Toubro (L&T) electric and automation (E&A) business in order to expand its business.

Mar-2018: Schneider Electric's Industrial Software business merged with AVEVA in order to deliver software to transform cost efficiency, safety and compliance, schedule,

quality, and safety of the asset delivery processes.

Jan-2018: Emerson took over ProSys Inc., for making day to day works easier in chemical, pulp and paper, oil & gas, etc. for making productivity increase.

Product Launches:

Jul-2019: Yokogawa introduced CENTUM™ VP R6.07 in order to improve the engineering efficiency.

Jun-2019: ABB launched DC-based power distribution system, Onboard Microgrid, in order to help the smaller vessels in improving the fuel efficiency.

Jun-2019: Honeywell introduced Experion® PKS Highly Integrated Virtual Environment (HIVE), a new approach for engineering which maintains industrial control systems.

Apr-2019: Honeywell released next-generation Kromschröder® BCU 4 Series, all-in-one control system for multi burner applications; it also offers effectiveness and utility of the control systems.

Mar-2019: Emerson launched new portfolio of programmable logic controllers (PLCs) for enabling the expanded manufacturing control and production optimization.

Mar-2019: Honeywell announced the launch of Inncom INNcontrol 5, a platform for energy management and guestroom control which lets the operators manage and monitor guestroom controls across the entire hotel property.

Mar-2019: Rudolph introduced new JetStep® lithography systems for advanced packaging processes on panel and wafer formats for automotive, mobile and high-power computing applications.

Jan-2019: General Electric launched Digital Ghost, a new cyber-defense solution in order to enhance its industrial control systems.

Jan-2019: Rudolph released Dragonfly™ G2 system for measuring copper pillar/bump height accurately.

Nov-2018: Rudolph launched NovusEdge system for edge, notch and backside inspection of unpatterned wafers for controlling the defects.

Jun-2018: Honeywell Process Solutions launched new solutions to ControlEdge™ Programmable Logic Controller (PLC) in order to increase the productivity and lowers the cost of ownership by providing enhanced engineering flexibility and connectivity options.

Expansions:

Apr-2019: Yokogawa launched FAST/TOOLS R10.04, real-time operations management and visualization software for adding it into OpreX™ Control and Safety System family in order to help the customers in deriving maximum value from their

investments over the entire system lifecycle.

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Scope of the Study

Market Segmentation:

By Product

Hardware

Control Systems

Interface and Display

Computing Systems

Others

Software

Services

By End User

Oil and Gas

Chemicals

Food & Beverages

Energy & Power

Mining, Minerals, and Metals

Pharmaceuticals

Others

By Geography

North America

US

Canada

Mexico

Rest of North America

Europe

Germany

UK

France

Russia

Spain

Italy

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Singapore

Malaysia

Rest of Asia Pacific

LAMEA

Brazil

Argentina

UAE

Saudi Arabia

South Africa

Nigeria

Rest of LAMEA

Companies Profiled

ABB Group

Emerson Electric Co.

General Electric (GE) Co.

Honeywell International, Inc.

Schneider Electric SE

Siemens AG

Panasonic Corporation

Yokogawa Electric Corporation

Rudolph Technologies, Inc.

Rockwell Automation, Inc.

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