

Global Machine Control System Market By Product (GNSS, Total Stations, Laser Scanners, and Airborne), By Equipment (Excavators, Loaders, Paving Systems, Graders and Others), By End User (Construction, Mining, Oil & Gas, Agriculture, Marine, and Others), By Region, Industry Analysis and Forecast, 2020 - 2026

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Abstracts

The Global Machine Control System Market size is expected to reach \$8.4 billion by 2026, rising at a market growth of 13.2% CAGR during the forecast period. Machine control frameworks use innovations, for example, GNSS, GIS, laser scanning, and robotics to examine the working regions and accurately recognize points where heavy earthmoving apparatus can be positioning. The right positioning of the earthmoving apparatus encourages the appropriate commencement of work and guarantees a protected environment. As such, it enhances the effectiveness of working by speeding up and precision in the earthmoving and construction work. The growing requirement for accuracy in control and navigation of heavy machinery is anticipated to boost the development of the market.

The construction & infrastructure industry is one of the significant aspects as far as the economy of the world is concerned. Different on-going construction ventures across the emerging and developed countries are employing a huge number of laborers across the world. Groundbreaking thoughts and innovation are supporting the growth in the construction sector. One of the significant advancements in the industry is the shift from 2 dimensional to 3-dimensional visualization. The HoloLens is one such headset in which a variety of electronic parts work in combination to give holographic computing innovation. This change from two dimensional to three dimensional has created a revolution in the operation and working of building construction.

Some of the protuberant drivers supporting the development of the worldwide machine control framework market are recognized as, replacement of conventional survey pegs with a positioning framework for accurate and productive machine operation, expanding construction projects in commercial and non-commercial sectors in the emerging nations, and expanded human and machinery wellbeing. Nonetheless, generally restricted to earthwork construction, the absence of specialized expertise and cost of training are some of the limiting components for the machine control framework market.

The deployment of machine control frameworks decreases the field and downtime of the machine and encourages proficient utilization of assets. The failure of heavy machinery to operate at the construction site may cause delays in work and result in huge losses in financial terms. Machine control advancements make sure about the precise monitoring and control of the construction gear to deliver ideal performance and quicker quality assurance at the operating locations. Therefore, investment in machine control frameworks guarantees saving time, prevent spending overruns and decrease costs associated with the maintenance of machines, which is foreseen to add to the development of the market.

Based on Product, the market is segmented into GNSS, Total Stations, Laser Scanners, and Airborne. Based on Equipment, the market is segmented into Excavators, Loaders, Paving Systems, Graders and Others. Based on End User, the market is segmented into Construction, Mining, Oil & Gas, Agriculture, Marine, and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

The major strategies followed by the market participants are Partnerships and Product Launches. Based on the Analysis presented in the Cardinal matrix; Volvo Group and Caterpillar, Inc. are the forerunners in the Machine Control Systems Market. Companies such as Komatsu Ltd., Topcon Corporation, and Hemisphere GNSS, Inc., Trimble, Inc., Eos Positioning Systems, Inc., MOBA Mobile Automation AG, and RIB Software SE are some of the key innovators in the market.

The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include Hexagon AB (Leica Geosystems AG), Topcon Corporation (Topcon Positioning Group), Trimble, Inc., Komatsu Ltd., Volvo Group, Caterpillar, Inc., RIB Software SE (Schneider Electric Investment AG), MOBA Mobile Automation AG, Eos Positioning Systems, Inc., and Hemisphere GNSS, Inc. (Beijing UniStrong Science & Technology Co., Ltd.).

Recent strategies deployed in Machine Control Systems Market

Partnerships, Collaborations, and Agreements:

Mar-2020: Leica Geosystems, a Hexagon company signed partnership agreement with Liebherr focusing on the field of machine control solutions. Through this partnership, Liebherr wheeled and crawler excavators of generations 6 and 8 can be optionally equipped from the factory with 2D and 3D machine control solutions.

Mar-2020: Leica Geosystems, a Hexagon company entered into collaboration with Zoomlion Heavy Industry Science & Technology Co., Ltd., a manufacturer of major high-tech equipment in the areas of engineering and agricultural industry. The collaboration was focused on the development of integrated 2D and 3D machine control and guidance systems. The collaboration started with supporting the Zoomlion Badger 215G excavator with Leica Geosystems machine control solutions for excavator guidance. Furthering the digitalization of construction and connecting more machines onsite for seamless workflows, the new technology enables the excavator to interface within a 2D or 3D environment.

Mar-2020: Topcon partnered with Hitachi (HCMUK) for providing an 'innovative' and 'sophisticated' machine control for a more efficient workflow. Under the partnership, HCMUK installed the Topcon X53-x automated machine control system on its range of excavators.

Apr-2019: Leica Geosystems collaborated with Kobelco Construction Machinery Europe B.V. (KCME) and Engcon. The collaboration was focused on the development of a world-first tiltrotator-compatible full machine control system for the Kobelco SK210LC-10 Excavator, dramatically improving on-site productivity. The system combines the latest 3D Machine Control (3DMC) technology from Leica Geosystems with the leading tiltrotator solution from Engcon.

Product Launches and Product Expansions:

Sep-2020: Volvo Construction Equipment extended its range of machine control systems to include a wider range of its wheeled loaders and is also launching productivity and serviceability enhancements on the machines. Volvo CE's Load Assist machine control applications would be available on its wheeled loader range from the L60H to the L350H models.

Aug-2020: Komatsu Europe launched the new PW158-11 wheeled excavator. This excavator offers all of the unrivaled versatility and innovation of the Komatsu PW-11 range. It provides comfort, intelligent safety features, superb productivity, factory-

installed Quick Couplers, and the highest levels of standard specifications. It also delivers great lifting capacity in an astonishingly compact package.

Apr-2020: Caterpillar unveiled the Mastless Cat Grade With 3D For Motor Graders. The Cat GRADE with 3D for motor graders helps contractors to realize the improved grading efficiency, accuracy, and productivity of automated grading systems without the limitations associated with GPS masts. The system can be installed and calibrated at the factory on new machine orders or as a field retrofit for existing models in customers' fleets.

Apr-2020: Trimble unveiled the Trimble Roadworks 2D Paving Control Platform for asphalt pavers. It is an automatic screed control system that improves the accuracy and productivity in the applications of asphalt paving.

Mar-2020: Volvo Construction Equipment launched Volvo Active Control, an automated grading machine control system for its EC220E, EC250E, and EC300E crawler excavators. The system allows operators to get the right depth and angle, reducing grading times by up to 45 percent. The system guides the operator through the functions to automate the digging process.

Mar-2020: Caterpillar announced the extension of Cat Command for Loading to its small wheel loader line. Command provides semi-autonomous remote operation of Cat 926M, 930M, and 938M models to increase operating safety in potentially hazardous operating environments. Cat Command for Loading for small wheel loaders would be available in both line-of-sight and non-line-of-sight operating configurations. By allowing the user to comfortably control the machine from a safe location, Command maintains high machine productivity in operating environments such as stevedoring, steel mill blast furnaces, industrial and waste, and demolition and site decommissioning.

Mar-2020: Topcon made advancements in its portfolio of machine control solutions that are designed to offer contractors with enhanced performance and profitability in earthmoving applications. The enhanced solutions include tilt rotator functionality for the Automatic Excavator system and mobile and Bring Your Own Device (BYOD) display options as significant developments in the current portfolio.

Mar-2020: Trimble launched the Trimble Earthworks Grade Control Platform version 2.0 with new features for all machine types, along with the release of the Trimble Earthworks Assistant App for in-cab learning material. These improvements are designed to enable faster ROI, increase productivity, and decrease training time for operators.

Nov-2019: Eos Positioning Systems released the highly anticipated underground utility asset-mapping solution, Eos Locate for Collector for ArcGIS. Eos Locate for Collector combines three core technologies: Eos Arrow GNSS receivers, Esri Collector, and the Vivax-Metrotech vLoc Series of locator devices. With Eos Locate for Collector, one fieldworker can collect both GNSS locations and locator data for any buried asset

including water, sewer, electric, cable, gas, fiber infrastructure, and more. They can do so quickly, accurately, and without the need for any additional field or office support.

Jun-2019: Volvo CE introduced the 20-tonne crawler excavator, EC200E. This crawler excavator was designed to meet the needs of the demanding medium-duty market. The excavator has been purpose-built to cater for a wide range of medium-duty applications and is positioned between the company's existing EC220E and EC180E units in the EMEA region.

Apr-2019: Hemisphere GNSS introduced the GradeMetrix platform, a machine guidance solution for high-precision GNSS-based machine control and guidance applications and systems. Hemisphere's GradeMetrix portfolio includes solution offerings for dozer and excavator earth-moving applications. GradeMatrix Solutions provide superior performance in every area whether it is grading, mining, excavating, or compaction applications.

Scope of the Study

Market Segmentation:

By Product

GNSS

Total Stations

Laser Scanners

Airborne

By Equipment

Excavators

Loaders

Paving Systems

Graders

Others

By End User

Construction

Mining

Oil & Gas

Agriculture

Marine

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

Hexagon AB (Leica Geosystems AG)

Topcon Corporation (Topcon Positioning Group)

Trimble, Inc.

Komatsu Ltd.

Volvo Group

Caterpillar, Inc.

RIB Software SE (Schneider Electric Investment AG)

MOBA Mobile Automation AG

Eos Positioning Systems, Inc.

Hemisphere GNSS, Inc. (Beijing UniStrong Science & Technology Co., Ltd.)

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