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Process Automation and Instrumentation Market - Forecasts from 2019 to 2024

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Abstracts

The process automation and instrumentation market is projected to expand at a CAGR of 5.22% to grow to US$143.089 billion by 2024, from US$105.443 billion in 2018. Growing adoption of automation across various end-use industries due to rising production costs and stringent regulations regarding workers' safety in the hazardous working environment is one of the major drivers of global process automation and instrumentation market. Rising need for energy-efficient processes to minimize the material wastage is further driving the demand for these solutions. Growing need for software solutions for detection and reduction of failures along with the technological advancement will bolster the global process automation and instrumentation market growth over the next five years.

By Process Type

The process automation and instrumentation market is segmented by process type into automation and instrumentation. The market for process automation solutions will grow at a higher CAGR during the forecast period due to the adoption of automation processes among various end-use industries such as food and beverage, pharmaceuticals, packaging, and pulp and paper among others. Growing concern over workers' safety in the hazardous locations, need to eliminate human errors and manufacturing cycle time, and manufacture products in a clean and hygienic environment will propel the growth of process automation market globally.

By End-User Industry

The process automation and instrumentation market is segmented by the end-user industry as oil and gas, water and wastewater, power, chemical, food and beverage,

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pharmaceuticals, and others. The oil and gas sector accounted for a significant market share in 2018 and is projected to continue its dominance throughout the forecast period. Rising demand for oil and gas worldwide coupled with technological advances in drilling and exploring activities will drive the demand for process automation and instrumentation solutions in this hazardous working environment industry. However, declining world oil prices could negatively impact the market growth rate in the near future.

By Geography

Geographically, North America held a significant share and is expected to grow robustly owing to the rising investments in chemical and petrochemical industry in the region. APAC will witness the fastest regional market growth during the forecast period. This growth is majorly attributed to the growth of end-use industries such as food and beverage, oil and gas, pharmaceuticals, and packaging in the region. Rapid industrialization and expanding urbanization is pushing manufacturers to implement automation solutions on a larger scale.

Competitive Insights

Prominent key market players in the process automation and instrumentation market include ABB, Siemens, Mitsubishi Electric Corporation, Honeywell International, Schneider Electric, General Electric, Texas Instruments, and others. The process automation and instrumentation market is highly competitive owing to the installation of automation process across various end-use industries. Regional vendors are trying to maintain competitiveness in the market by providing free access to after sales services for a year post installation and commissioning. Increasing investment in R&D, new product developments, and M&A by key market players will further enhance the industry competitiveness in the near future. Recently in 2017, ABB acquired Bernecker & Rainer, the Australian industrial automation company, to expand its product portfolio while challenging its rival company Siemens on the factory floor.

Segmentation

The process automation and instrumentation market has been segmented by process type, product and geography.

By Process type

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Automation

Instrumentation

By Product

Control Valves

Transmitters

Analyzers

By Solution

Programmable Logic Controller (PLC)

Distributed Control System (DCS)

Supervisory Control and Data Acquisition (SCADA)

Manufacturing Execution System (MES)

Others

By End User Industry

Oil and Gas

Power

Chemical

Pharmaceuticals

Others

By Geography

North America

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USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

Germany

France

United Kingdom

Spain

Others

Middle East and Africa

Saudi Arabia

Israel

Others

Asia Pacific

China

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Japan

South Korea

India

Others

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