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Discrete Automation Market Forecasts to 2032 – Global Analysis By Type (Programmable Logic Controllers, Manufacturing Execution Systems, Product Lifecycle Management, Distributed Control Systems, and Other Types), Component (Hardware, Software, and Services), Application, End User, and By Geography

https://marketpublishers.com/r/D7CF72940752EN.html
Date: November 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: D7CF72940752EN

Abstracts

According to Stratistics MRC, the Global Discrete Automation Market is accounted for $187.0 billion in 2025 and is expected to reach $298.4 billion by 2032, growing at a CAGR of 6.9% during the forecast period. Discrete automation is about using robots, controllers, sensors, and machine vision to automate the assembly and manufacturing of individual items like electronics, car parts, and consumer products. Systems enable high precision, repeatability, and flexible production lines for varied product mixes. Adoption is driven by labor dynamics, customization trends, and the need for quality consistency. Vendors emphasize flexible robots, quick-change tooling, and simulation tools to shorten changeover times and enable small-batch, high-variety manufacturing.

Market Dynamics:

Driver:

Increasing labor costs and shortage of skilled workers

Rising labor expenses and a persistent global shortage of skilled manufacturing workers are primary catalysts for discrete automation adoption. More and more businesses are using automation to keep their operations running smoothly and their production levels

steady. By deploying robotics and automated systems, businesses can mitigate dependency on manual labor, reduce long-term operational expenditures, and enhance productivity. This strategic shift is critical to sustaining competitiveness, particularly in high-cost regions, thereby directly fueling market growth as automation becomes an economic necessity rather than a luxury for modern manufacturing.

Restraint:

High initial investment and implementation costs

The high initial costs of hardware, software, and systems integration make it hard for small and medium-sized businesses (SMEs) to adopt new technology. This high initial investment includes not only the purchase of robots and controllers but also the costs associated with system design, installation, and employee training. Consequently, the lengthy return on investment period can deter businesses from committing to large-scale automation projects, potentially slowing market penetration in cost-sensitive industrial segments and limiting overall market expansion in the near term.

Opportunity:

Development of collaborative robotics and flexible automation solutions

The emergence of collaborative robots (cobots) and adaptable automation systems opens vast new application areas, particularly for SMEs. Unlike traditional industrial robots, cobots can work safely alongside human workers and are easier to program and redeploy for various tasks. This flexibility allows manufacturers to automate specific processes without completely redesigning production lines. Furthermore, this trend enables high-mix, low-volume production, meeting the demand for customization and creating a significant growth avenue for automation providers targeting previously untapped market segments.

Threat:

Economic volatility affecting capital expenditure in manufacturing sectors

Discrete automation is highly susceptible to economic downturns and fluctuations in industrial output. During periods of economic uncertainty or recession, manufacturers often delay or cancel capital-intensive projects like automation upgrades to preserve cash flow. This cycle of ups and downs is a constant risk to market stability because

when companies spend less money, it directly affects new system orders and can cause projects to be delayed. Therefore, the overall health and confidence of the global manufacturing industry closely influences the market's growth.

Covid-19 Impact:

The pandemic initially disrupted the discrete automation market through severe supply chain interruptions and manufacturing shutdowns, stalling project deployments. However, it ultimately acted as a catalyst by exposing the vulnerabilities of reliant human labor. Post-lockdown, the urgent need for operational resilience and social distancing protocols accelerated the adoption of automation. These developments led to a surge in demand for robotics and automated systems as companies sought to de-risk their operations, ensuring business continuity against future disruptions and driving a robust market recovery.

The programmable logic controllers (PLC) segment is expected to be the largest during the forecast period

The programmable logic controllers (PLC) segment is expected to account for the largest market share during the forecast period. The programmable logic controllers (PLC) segment is expected to account for the largest market share during the forecast period. PLCs form the foundational control backbone of most discrete automation systems, governing machinery on factory floors across countless industries. Their enduring dominance is attributed to proven reliability, robustness in harsh industrial environments, and a vast installed base that necessitates continuous replacement and upgrades. The ongoing modernization of aging industrial infrastructure in developed economies and new factory deployments in developing regions ensure consistent demand.

The services segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the services segment is predicted to witness the highest growth rate, driven by the escalating complexity of automation systems. As companies integrate advanced robotics and IoT-enabled solutions, the need for specialized expertise in system integration, consulting, and maintenance intensifies. Moreover, the shift towards predictive maintenance and connected factory ecosystems creates a sustained demand for ongoing support and optimization services. This growth highlights a change in the market where the focus is more on the knowledge and ongoing help needed to keep these advanced systems running smoothly.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, anchored by its position as the global manufacturing hub, with China, Japan, and South Korea at the forefront. The region benefits from massive industrial output, strong government initiatives promoting industrial automation, such as 'Made in China 2025,' and significant investments in upgrading manufacturing capabilities. The large number of car, electronics, and machinery manufacturers in the area creates a strong need for discrete automation solutions, which helps maintain the region's leading position in the global market.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by the rapid industrialization of emerging economies like India, Vietnam, and Thailand. These countries are actively attracting manufacturing investments, leading to the establishment of new, modern factories equipped with advanced automation. Additionally, rising labor costs in the region are compelling manufacturers to automate in order to sustain competitiveness. This combination of greenfield investments and the pressing need for operational efficiency creates a powerful growth engine, propelling the region's CAGR ahead of other mature markets.

Key players in the market

Some of the key players in Discrete Automation Market include Siemens AG, ABB Ltd., Schneider Electric SE, Rockwell Automation, Inc., Mitsubishi Electric Corporation, Honeywell International Inc., Emerson Electric Co., Omron Corporation, Yokogawa Electric Corporation, FANUC Corporation, Yaskawa Electric Corporation, Bosch Rexroth AG, Delta Electronics, Inc., Beckhoff Automation GmbH & Co. KG, Keyence Corporation, Fuji Electric Co., Ltd., Parker Hannifin Corporation, and General Electric Company.

Key Developments:

In October 2025, Rockwell Automation launched its new ControlLogix® 5590 controller, designed for modern discrete, motion and robotics applications across manufacturing.

In May 2025, Siemens is announcing an expansion of its industrial AI offerings with

advanced AI agents designed to work seamlessly across its established Industrial Copilot ecosystem. This new technology represents a fundamental shift from AI assistants that respond to queries towards truly autonomous agents that proactively execute entire processes without human intervention. Siemens' new AI agent architecture features a sophisticated orchestrator. Like a craftsman, it deploys a toolbox of specialized agents to solve complex tasks across the entire industrial value chain.

In March 2025, Siemens introduced advanced AI agents for industrial automation under its Industrial Copilot ecosystem, enabling proactive execution of processes in discrete industries.

Types Covered:

- Programmable Logic Controllers (PLC)
- Manufacturing Execution Systems (MES)
- Product Lifecycle Management (PLM)
- Distributed Control Systems (DCS)
- Other Types

Components Covered:

- Hardware
- Software
- Services

Applications Covered:

- Assembly Line Automation
- Material Handling and Logistics Automation

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Inspection and Quality Control

Packaging and Palletizing

Testing and Measurement

End Users Covered:

Automotive

Electronics and Semiconductor

Aerospace and Defense

Machinery Manufacturing

Food & Beverage

Logistics and Warehousing

Medical Devices and Pharmaceuticals

Consumer Goods and Packaging

Textile

Other End Users

Regions Covered:

North America

US

Canada

Mexico

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Europe

- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

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Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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