

# **Automation Control Components Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Relays/Couplers, Connectors, Switches, Encoders/Potentiometers), By End Use (Automotive, Mining & Metals, Energy & Power, Manufacturing, Electronics & Semiconductor, Aerospace & Defense, Oil & Gas, Others), By Region, By Competition, 2019-2029F**

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## **Abstracts**

Global Automation Control Components Devices Market was valued at USD 52.08 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.19% through 2029. The Automation Control Components and Devices market refers to a dynamic and expansive sector within the global industrial landscape, primarily dedicated to the design, production, and distribution of a wide array of sophisticated components and devices that enable automation and control processes across various industries. These components and devices include but are not limited to programmable logic controllers (PLCs), sensors, actuators, human-machine interfaces (HMIs), industrial robots, and other automation-related hardware and software solutions.

This market plays a pivotal role in driving efficiency, precision, and productivity in industries such as manufacturing, automotive, healthcare, energy, aerospace, and many others. It empowers organizations to streamline operations, reduce errors, and enhance overall performance by providing the tools necessary to monitor, control, and optimize complex systems and processes.

Key factors driving this market's growth include technological advancements, the

integration of Industry 4.0 concepts, the need for energy efficiency, and the expansion of automation into emerging sectors like renewable energy and e-commerce. As industries worldwide continue to embrace automation for competitive advantage, the Automation Control Components and Devices market is poised for ongoing expansion and innovation.

The primary driver of the global Automation Control Components and Devices market is the growing demand for industrial automation. Across various industries, including manufacturing, energy, automotive, and pharmaceuticals, companies are increasingly embracing automation to boost productivity and reduce operational errors. Automation control components and devices, such as programmable logic controllers (PLCs), sensors, and human-machine interfaces (HMIs), enable precise control and monitoring of complex processes. This surge in automation adoption, driven by the need for improved efficiency and cost-effectiveness, is fueling the expansion of the market, as organizations continue to invest in advanced control solutions for their operations.

## Key Market Drivers

### Increasing Industrial Automation

The global Automation Control Components and Devices market is driven by the ever-increasing demand for industrial automation. Industries are increasingly adopting automation to improve productivity, reduce errors, and streamline operations. This trend is prominent across various sectors, including manufacturing, energy, automotive, and pharmaceuticals. The use of automation control components and devices, such as programmable logic controllers (PLCs), sensors, and human-machine interfaces (HMIs), allows for seamless control and monitoring of complex processes. The growing need for greater efficiency and cost-effectiveness is propelling the market forward.

Automation in manufacturing, for example, has led to the creation of smart factories, where robots and machines work alongside human workers, optimizing production and ensuring consistent product quality. This reliance on automation is fueling the demand for advanced control components and devices that can handle intricate tasks. As industries continue to invest in automation, the market for automation control components and devices is poised for substantial growth.

### Technological Advancements and Industry 4.0

The ongoing technological advancements and the emergence of Industry 4.0 are driving

the Automation Control Components and Devices market. Industry 4.0 represents the fourth industrial revolution, characterized by the integration of digital technologies, the Internet of Things (IoT), big data, and artificial intelligence (AI) into manufacturing processes. As companies strive to stay competitive and meet the demands of the digital age, they require sophisticated control components and devices to power their automated systems.

In this era, automation control components and devices are evolving to offer enhanced connectivity, data analysis capabilities, and predictive maintenance. IoT-enabled sensors and actuators, for instance, can provide real-time data, enabling predictive maintenance to reduce downtime and enhance efficiency. This technological revolution is not only improving productivity but also opening new opportunities for automation control component manufacturers.

### Energy Efficiency and Sustainability

Energy efficiency and sustainability are paramount concerns for industries worldwide. The global push for environmental conservation and sustainability is compelling companies to adopt energy-efficient automation solutions. Automation control components and devices contribute to this goal by optimizing energy consumption in various processes. Programmable controllers, for example, help regulate machinery to reduce energy wastage.

The increasing emphasis on green manufacturing practices encourages the use of automation in industries like renewable energy and electric vehicle production. Automation control components and devices are essential in achieving the high precision required in these environmentally friendly sectors. As governments implement stricter regulations on energy consumption and emissions, the demand for energy-efficient automation control solutions is expected to rise, driving market growth.

### Expansion of E-commerce and Warehousing

The exponential growth of e-commerce and the need for efficient warehousing and logistics operations are major drivers of the Automation Control Components and Devices market. The rise in online shopping has led to a surge in demand for automated warehouses and distribution centers. Automation control components and devices play a crucial role in these facilities by managing conveyor systems, sorting machines, and robotic pick-and-place systems.

The speed and accuracy required in e-commerce order fulfillment demand sophisticated automation solutions. Automation control components enable seamless coordination of these systems, resulting in faster order processing and improved customer satisfaction. As e-commerce continues to expand globally, the need for advanced automation control components and devices will only increase, making it a significant driver of market growth.

### Healthcare and Pharmaceutical Industry Advancements

The healthcare and pharmaceutical industries are witnessing significant advancements, and automation control components and devices are key enablers of these changes. Automation is crucial in pharmaceutical manufacturing, where precision and quality control are paramount. It ensures consistent production and adherence to strict regulations.

The adoption of automation in healthcare, particularly in laboratories and diagnostic facilities, is also growing. Automated testing equipment, robotic surgery systems, and patient monitoring devices are becoming more prevalent, requiring advanced control components for seamless operation. These advancements are driven by the need for faster and more accurate diagnostics and treatments. As the healthcare and pharmaceutical sectors continue to evolve, the Automation Control Components and Devices market will expand in tandem.

### Aerospace and Defense Sector Growth

The aerospace and defense sector is experiencing robust growth and is a significant driver of the Automation Control Components and Devices market. These industries require highly reliable and precise automation control solutions for aircraft manufacturing, maintenance, and unmanned aerial systems (UAS). The demand for advanced automation control components and devices is growing due to the increasing complexity of aerospace systems and the need for enhanced safety and efficiency.

Automation in defense also extends to surveillance, logistics, and cybersecurity. The adoption of autonomous systems in military applications is on the rise, necessitating cutting-edge control components and devices. This sector's growth is being fueled by technological innovations, geopolitical developments, and a focus on national security, all of which contribute to the expansion of the Automation Control Components and Devices market.

The global Automation Control Components and Devices market is being propelled by diverse factors, including the increasing need for industrial automation, technological advancements, sustainability initiatives, e-commerce growth, healthcare and pharmaceutical advancements, and expansion in the aerospace and defense sector. These drivers collectively shape the landscape of the market, offering promising opportunities for manufacturers and stakeholders in the automation industry.

## Government Policies are Likely to Propel the Market

### Industrial Safety and Standards

Ensuring industrial safety and setting regulatory standards is a fundamental government policy that significantly affects the Automation Control Components and Devices market. Governments worldwide establish guidelines and regulations to ensure the safety of workers and the public when automation control components and devices are used in industrial settings.

These standards cover aspects like machine safety, electrical safety, and the use of automation components in hazardous environments. For instance, organizations like OSHA in the United States and ISO standards at the international level mandate safety measures and standards for the design and use of automation control components. Compliance with these policies is not only essential for worker safety but also influences the design and development of automation technologies.

### Export Control and International Trade

Government policies related to export control and international trade have a significant impact on the global Automation Control Components and Devices market, especially for companies operating across borders. Export control policies aim to prevent sensitive technologies from falling into the wrong hands. Governments regulate the export of certain automation control components that may have military or dual-use applications.

Compliance with export control policies is crucial for companies in this industry to avoid legal issues and ensure responsible trade practices. Additionally, trade policies such as tariffs and trade agreements can influence the cost of automation components, affecting the competitiveness and market dynamics of the industry.

### Research and Development Incentives

Many governments around the world encourage research and development (R&D) in automation technologies by offering incentives and subsidies. These incentives can include tax breaks, grants, or funding programs aimed at promoting innovation in the field of automation control components and devices.

Government support for R&D fosters technological advancements and the development of cutting-edge automation solutions. It helps companies invest in research to create more efficient, reliable, and cost-effective products, thus benefiting the market as a whole. By promoting innovation, governments contribute to the industry's growth and competitiveness on a global scale.

### Renewable Energy and Green Initiatives

The growing emphasis on renewable energy and green initiatives has led to government policies that encourage the use of automation control components in environmentally friendly applications. These policies promote the development and adoption of automation technologies in sectors such as solar and wind energy, where automation control is essential for efficient energy generation and management.

Incentives, subsidies, and regulations are designed to drive the adoption of automation in green energy production and energy-efficient manufacturing. Such policies aim to reduce carbon emissions and promote sustainability, thereby shaping the Automation Control Components and Devices market by fostering its application in these emerging sectors.

### Cybersecurity and Data Protection

As automation technologies become more interconnected and reliant on digital systems, governments have implemented policies to address cybersecurity and data protection concerns. These policies are essential to safeguard critical infrastructure and sensitive data, especially in industries such as energy, healthcare, and defense where the use of automation is extensive.

Government regulations on data privacy, cybersecurity standards, and incident reporting requirements affect the development and deployment of automation control components and devices. Compliance with these policies is crucial for manufacturers to maintain the trust of customers and to prevent data breaches or cyberattacks that could disrupt operations.



## Trade Agreements and Tariffs

Trade agreements and tariffs play a significant role in shaping the global Automation Control Components and Devices market. These policies can influence the cost of automation components and devices by affecting the pricing of raw materials and finished products. Trade agreements between countries can facilitate smoother international trade, while tariffs can create barriers or additional costs for businesses operating globally.

Trade tensions between major economies can lead to tariff disputes, impacting the cost and availability of automation components. On the other hand, trade agreements can promote cooperation and reduce trade barriers, benefiting manufacturers and end-users in the automation industry.

Government policies related to industrial safety, export control, R&D incentives, renewable energy, cybersecurity, and trade agreements have a significant impact on the global Automation Control Components and Devices market. These policies shape the regulatory environment and market conditions for manufacturers and users of automation technologies, influencing safety standards, innovation, sustainability, and international trade dynamics in the industry.

## Key Market Trends

### Increased Adoption of Industrial IoT (IIoT) Solutions

In recent years, the Global Automation Control Components Devices Market has witnessed a significant surge in the adoption of Industrial Internet of Things (IIoT) solutions. IIoT refers to the interconnectivity of devices, machines, and systems within industrial environments, leveraging sensors, connectivity, and analytics to optimize operations. This trend is primarily driven by the growing demand for enhanced efficiency, productivity, and cost-effectiveness across various industries such as manufacturing, automotive, energy, and healthcare.

One of the key drivers behind the increased adoption of IIoT solutions is the potential for predictive maintenance. By deploying sensors and connected devices, businesses can gather real-time data on equipment performance, enabling proactive maintenance to prevent costly downtime. Additionally, IIoT facilitates remote monitoring and control of machinery and processes, allowing for greater operational visibility and control.

IIoT enables the integration of automation control components with advanced analytics platforms and machine learning algorithms. This integration empowers organizations to derive actionable insights from vast amounts of data, leading to optimized production processes, improved product quality, and better decision-making.

The adoption of IIoT solutions is expected to continue rising as businesses strive to stay competitive in an increasingly digitalized world. However, challenges such as data security concerns, interoperability issues, and the need for skilled personnel to manage IIoT implementations may hinder the widespread adoption of these technologies.

The increased adoption of IIoT solutions represents a significant market trend in the Global Automation Control Components Devices Market, driving innovation and reshaping the industrial landscape.

## Key Market Challenges

### Technological Complexity and Integration

One of the foremost challenges in the global Automation Control Components and Devices market is the increasing technological complexity and the demand for seamless integration. As automation technologies evolve and industries strive to achieve higher levels of efficiency and precision, the complexity of the control components and devices needed also grows. This complexity is driven by factors such as Industry 4.0, the Internet of Things (IoT), and artificial intelligence (AI), which are transforming the landscape of automation.

With the rise of Industry 4.0, automation systems are becoming more interconnected, data-driven, and intelligent. This means that automation control components and devices need to be equipped with advanced sensors, communication protocols, and computing power to handle the influx of data and execute complex tasks. Integration across different devices and systems is essential for seamless data flow and decision-making.

This complexity poses several challenges:

**Compatibility Issues:** Automation control components from various manufacturers may use different communication protocols and standards, making integration a daunting task. Compatibility issues can result in delays and higher implementation costs.



**Skills Gap:** As automation systems become more sophisticated, there is a growing need for skilled professionals who can design, implement, and maintain these complex systems. Finding and retaining talent with the necessary skills can be a challenge for many organizations.

**Cybersecurity Concerns:** The increased connectivity of automation control components also opens up vulnerabilities to cyberattacks. Ensuring the security of these devices and systems is a continuous challenge in an era of increasing cyber threats.

**Cost Implications:** Developing and integrating advanced technologies often comes with higher costs, which can be a barrier for small and medium-sized businesses.

To address this challenge, industry players must invest in research and development, standardization efforts, and cybersecurity measures. Additionally, educational and training programs can help bridge the skills gap by preparing a workforce capable of managing and optimizing complex automation systems.

## Regulatory Compliance and Standards

Regulatory compliance and adherence to industry standards pose another significant challenge for the global Automation Control Components and Devices market. Various industries are subject to specific regulations that govern the use of automation technologies, especially in sectors where safety and quality are paramount, such as manufacturing, healthcare, and aerospace.

The challenges related to regulatory compliance and standards include:

**Evolving Regulations:** Regulations are not static and are subject to changes and updates. Manufacturers and users of automation control components and devices must stay abreast of the latest regulatory requirements and ensure their products and systems are in compliance. This demands continuous vigilance and adaptability.

**International Variability:** Different countries and regions may have their own sets of regulations and standards. For companies operating globally, this can lead to

complexity and higher compliance costs as they must meet varying requirements.

**Testing and Certification:** Complying with regulations often requires extensive testing and certification processes, which can be time-consuming and expensive. Failure to meet regulatory standards can result in costly delays and product recalls.

**Interoperability Challenges:** The need to ensure compatibility with various international standards while maintaining interoperability can be a complex undertaking, requiring significant engineering effort.

**Liability and Risk Management:** Non-compliance with regulations can result in legal liabilities and risks for manufacturers and end-users, impacting their reputation and financial well-being.

To tackle these challenges, industry stakeholders should actively engage with regulatory authorities to provide input and seek alignment with international standards. Companies can also invest in robust compliance management systems, quality assurance, and certification processes to ensure their products meet the necessary regulatory requirements. Moreover, education and training on regulatory matters should be a priority to keep professionals informed and equipped to navigate this intricate landscape.

The global Automation Control Components and Devices market faces the twin challenges of technological complexity and integration, as well as regulatory compliance and standards. Addressing these challenges requires a combination of innovation, investment, education, and cooperation between industry players, regulatory bodies, and standardization organizations to ensure that automation technologies continue to evolve while meeting safety, quality, and regulatory requirements.

## Segmental Insights

### Type Insights

The Relays/Couplers segment held the largest Market share in 2023. Relays and couplers are highly versatile components used across a wide range of industries and applications. They can switch electrical signals, isolate circuits, and amplify signals,

making them adaptable to various automation needs. Relays and couplers are known for their reliability in controlling and managing electrical signals. They offer precise control, and when designed and maintained correctly, they can operate for extended periods without failure. This reliability is crucial in industries where safety and consistency are paramount. Couplers, in particular, provide electrical isolation, protecting sensitive components from voltage spikes and interference. This isolation is essential in environments with electrical noise, ensuring that sensitive equipment remains safe and operational. These components have a long operational lifespan, which is especially important in industrial automation settings. Longevity minimizes the need for frequent replacements or maintenance, reducing downtime and overall operational costs. Relays and couplers are used extensively in safety-critical applications, such as emergency shutdown systems in process industries. They offer a fail-safe mechanism, ensuring that processes can be halted in case of a malfunction or emergency. These components are compatible with a wide range of control systems and are often integrated seamlessly into automation setups. Their compatibility with various control devices and systems simplifies the design and implementation of automation solutions. Relays and couplers have a long history in automation and have been widely adopted in multiple industries for decades. This established use has led to their continued dominance. Compared to some other advanced components, relays and couplers are often more cost-effective, making them attractive options for businesses looking to implement automation solutions without a significant upfront investment.

## Regional Insights

North America was the largest market for automation control components and devices in 2023. North America boasts a highly developed industrial landscape across various sectors such as manufacturing, automotive, aerospace, and healthcare. These industries heavily rely on automation to improve efficiency, productivity, and quality while reducing operational costs. As a result, there is a substantial demand for automation control components and devices in this region to support the automation needs of these diverse industries.

North America is home to numerous global leaders and innovative companies in automation technology, including manufacturers of control systems, sensors, actuators, and other automation components. These companies continuously invest in research and development to introduce cutting-edge technologies and solutions that cater to the evolving needs of industries. The presence of such industry players enhances the availability and accessibility of advanced automation control components in the North American market, driving its growth and dominance.

The region's strong emphasis on technological innovation and digitalization further fuels the adoption of automation control components and devices. North American businesses are quick to embrace new technologies that promise to enhance operational efficiency, improve product quality, and maintain competitiveness in the global market. This proactive approach to technological advancements creates a conducive environment for the widespread adoption of automation solutions, propelling the growth of the market for automation control components and devices.

Government initiatives and policies in North America often support and incentivize the adoption of automation technologies to drive economic growth, enhance industrial competitiveness, and create jobs. These initiatives may include tax incentives, grants, and funding programs aimed at promoting automation investments among businesses. Such government support fosters a favorable business environment for automation technology providers and encourages end-users to invest in automation solutions, thereby contributing to the expansion of the market.

North America's robust infrastructure, including well-established communication networks, transportation systems, and supply chains, facilitates the implementation of automation across various industries. The region's advanced infrastructure provides a solid foundation for the deployment of interconnected automation systems, Industrial Internet of Things (IIoT) solutions, and other Industry 4.0 technologies, driving further demand for automation control components and devices.

### Key Market Players

Rockwell Automation Inc.

Siemens AG

Schneider Electric SE

ABB Ltd.

Honeywell International Inc.

Mitsubishi Electric Corporation

Omron Corporation

Emerson Electric Co.

Yokogawa Electric Corporation

Phoenix Contact USA Inc.

### Report Scope:

In this report, the Global Automation Control Components Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Automation Control Components Devices Market, By Type:

Relays/Couplers

Connectors

Switches

Encoders/Potentiometers

#### Automation Control Components Devices Market, By End Use:

Automotive

Mining & Metals

Energy & Power

Manufacturing

Electronics & Semiconductor

Aerospace & Defense

Oil & Gas

Others

Automation Control Components Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America



Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automation Control Components Devices Market.

## Available Customizations:

Global Automation Control Components Devices Market report with the given Market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional Market players (up to five).

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## **13. COMPANY PROFILES**

- 13.1. Rockwell Automation Inc.

- 13.1.1. Business Overview
- 13.1.2. Key Revenue and Financials
- 13.1.3. Recent Developments
- 13.1.4. Key Personnel/Key Contact Person
- 13.1.5. Key Product/Services Offered
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  - 13.2.1. Business Overview
  - 13.2.2. Key Revenue and Financials
  - 13.2.3. Recent Developments
  - 13.2.4. Key Personnel/Key Contact Person
  - 13.2.5. Key Product/Services Offered
- 13.3. Schneider Electric SE
  - 13.3.1. Business Overview
  - 13.3.2. Key Revenue and Financials
  - 13.3.3. Recent Developments
  - 13.3.4. Key Personnel/Key Contact Person
  - 13.3.5. Key Product/Services Offered
- 13.4. ABB Ltd.
  - 13.4.1. Business Overview
  - 13.4.2. Key Revenue and Financials
  - 13.4.3. Recent Developments
  - 13.4.4. Key Personnel/Key Contact Person
  - 13.4.5. Key Product/Services Offered
- 13.5. Honeywell International Inc.
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  - 13.5.4. Key Personnel/Key Contact Person
  - 13.5.5. Key Product/Services Offered
- 13.6. Mitsubishi Electric Corporation
  - 13.6.1. Business Overview
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  - 13.6.3. Recent Developments
  - 13.6.4. Key Personnel/Key Contact Person
  - 13.6.5. Key Product/Services Offered
- 13.7. Omron Corporation
  - 13.7.1. Business Overview
  - 13.7.2. Key Revenue and Financials
  - 13.7.3. Recent Developments

13.7.4. Key Personnel/Key Contact Person

13.7.5. Key Product/Services Offered

13.8. Emerson Electric Co.

13.8.1. Business Overview

13.8.2. Key Revenue and Financials

13.8.3. Recent Developments

13.8.4. Key Personnel/Key Contact Person

13.8.5. Key Product/Services Offered

13.9. Yokogawa Electric Corporation

13.9.1. Business Overview

13.9.2. Key Revenue and Financials

13.9.3. Recent Developments

13.9.4. Key Personnel/Key Contact Person

13.9.5. Key Product/Services Offered

13.10. Phoenix Contact USA Inc.

13.10.1. Business Overview

13.10.2. Key Revenue and Financials

13.10.3. Recent Developments

13.10.4. Key Personnel/Key Contact Person

13.10.5. Key Product/Services Offered

## **14. STRATEGIC RECOMMENDATIONS**

## **15. ABOUT US & DISCLAIMER**

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