

# **Field Device Management Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Offering (Hardware, Software), By Communication Protocol (Foundation Fieldbus and Hart, Profibus, Profinet, Ethernet/I.P., Modbus, Others), By Deployment Type (On-Premises, Cloud), By Industry (Discrete Industries, Process Industries), By Region, and Competition, 2019-2029F**

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## **Abstracts**

Global Field Device Management Market was valued at USD 1506.34 million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.72% through 2029. The Global Field Device Management Market encompasses a wide range of technologies and solutions designed to manage and optimize field devices used in industrial processes, such as sensors, actuators, controllers, and instruments. These devices play a crucial role in monitoring and controlling various parameters, including temperature, pressure, flow, and level, across industries such as oil and gas, chemicals, manufacturing, utilities, and pharmaceuticals. One of the key drivers of the Global Field Device Management Market is the increasing adoption of Industrial Internet of Things (IIoT) and automation technologies. As industries digitize and automate their processes, there is a growing need for advanced field device management solutions that can seamlessly integrate with IIoT platforms, enabling real-time monitoring, remote diagnostics, predictive maintenance, and performance optimization of field devices. The stringent regulatory requirements and safety standards in industries such as oil and gas, pharmaceuticals, and chemicals drive the demand for field device management solutions that ensure compliance, reliability, and safety of industrial processes. These solutions provide features such as asset tracking,

calibration management, documentation, and audit trails to support regulatory compliance and enhance operational efficiency. The increasing complexity and diversity of field devices used in industrial processes necessitate comprehensive management and maintenance strategies. Field device management solutions offer centralized platforms for configuration, monitoring, diagnostics, and maintenance of field devices, enabling proactive management of assets, minimizing downtime, and optimizing performance. The rising focus on operational excellence, cost reduction, and sustainability drives the adoption of field device management solutions that enable predictive maintenance, energy optimization, and process efficiency improvements. These solutions leverage advanced analytics, machine learning, and artificial intelligence to analyze data from field devices, identify trends, and optimize operations, thereby driving value and competitiveness for industrial organizations. Overall, the Global Field Device Management Market is driven by the increasing digitization, automation, regulatory compliance requirements, and operational excellence initiatives across industries worldwide.

## Key Market Drivers

### Rising Industrial Automation

The global landscape of industrial operations is undergoing a profound transformation with the rapid adoption of automation technologies. As industries worldwide strive for increased efficiency, reduced operational costs, and enhanced productivity, industrial automation has emerged as a cornerstone of this evolution. One significant beneficiary of this trend is the Global Field Device Management (FDM) Market. Rising industrial automation involves the integration of smart technologies and control systems across various industrial processes. Field devices, such as sensors, actuators, and controllers, form the backbone of these automated systems. FDM solutions play a pivotal role in ensuring the seamless integration and communication between these field devices and centralized control systems. As the number of automated processes increases, so does the demand for effective FDM to manage and monitor these devices in real-time. Industrial automation aims to streamline operations by minimizing human intervention and maximizing precision. FDM facilitates centralized control and monitoring of field devices, allowing for efficient management of assets spread across diverse industrial environments. This centralized approach not only enhances operational efficiency but also provides a comprehensive view of the entire system, enabling quick responses to deviations and minimizing downtime. Automated industrial processes generate vast amounts of data in real-time. FDM systems leverage this data to provide insights into the performance, health, and status of field devices. This real-

time visibility empowers decision-makers to make informed choices promptly, whether it's adjusting operational parameters, scheduling maintenance activities, or optimizing resource allocation. The synergy between automation and FDM results in a more agile and responsive industrial ecosystem. Automation, coupled with predictive maintenance strategies, is a powerful combination for minimizing unplanned downtime. FDM solutions offer predictive maintenance capabilities by continuously monitoring the condition of field devices and identifying potential issues before they escalate. This proactive approach to maintenance ensures that equipment operates at peak efficiency, extending its lifespan and reducing overall maintenance costs. As industries embrace automation, there is a growing need for scalable and flexible solutions that can adapt to changing operational requirements. FDM systems are designed to be scalable, accommodating an increasing number of field devices seamlessly. This flexibility ensures that as industrial automation scales, the associated FDM infrastructure can evolve in tandem, supporting the dynamic needs of the automated ecosystem.

### Increasing Complexity of Industrial Processes

The modern industrial landscape is marked by a continuous evolution towards more intricate and interconnected processes. As industries strive for heightened efficiency, improved productivity, and enhanced decision-making, the complexity of industrial processes has surged. Amid this complexity, the Global Field Device Management (FDM) Market is experiencing a significant upswing. The increasing complexity of industrial processes is characterized by the proliferation of diverse field devices. These devices, including sensors, actuators, and controllers, are critical components of automated systems. The FDM market responds to this complexity by offering solutions that enable seamless integration, monitoring, and management of these diverse field devices. As industrial processes become more intricate, the demand for FDM solutions rises to ensure the efficient orchestration of this diversity. In complex industrial ecosystems, field devices are often dispersed across various locations and environments. FDM systems provide a centralized management platform that allows organizations to navigate this decentralized landscape effectively. This centralized approach is essential for ensuring that all field devices operate in harmony, minimizing errors, and maximizing the overall efficiency of complex industrial processes. The intricate nature of modern industrial processes requires real-time insights and control capabilities. FDM solutions offer real-time monitoring of field devices, providing operators and decision-makers with up-to-the-minute data on device status, performance, and health. This real-time visibility is invaluable in managing the complexities of industrial operations, enabling swift responses to deviations and optimizing processes on the fly. Industrial processes often span diverse environments,

from manufacturing floors to remote field locations. The FDM market caters to this diversity by providing solutions that can adapt to varied operational environments. Whether it's monitoring sensors in a factory or controlling actuators in a remote facility, FDM systems offer the flexibility required to address the complexities of different operational landscapes. The intricacies of modern industrial processes demand a fine-tuned approach to resource utilization. FDM solutions contribute to this optimization by providing insights into the performance of field devices. This information allows organizations to identify inefficiencies, allocate resources more effectively, and implement measures to enhance overall operational efficiency. The result is a streamlined and optimized industrial ecosystem.

### Emphasis on Predictive Maintenance

In the dynamic realm of industrial operations, the focus on predictive maintenance has emerged as a game-changer, redefining how organizations manage their assets and ensure operational continuity. As industries increasingly recognize the value of foreseeing and preventing equipment failures, the Global Field Device Management (FDM) Market stands poised for substantial growth. The cornerstone of predictive maintenance is the ability to monitor the health of critical equipment in real-time. FDM systems play a pivotal role in this regard, providing a comprehensive platform for the continuous monitoring of field devices. By harnessing the power of predictive analytics, these systems offer insights into the performance and condition of assets, allowing organizations to identify potential issues before they escalate into costly failures. Predictive maintenance strategies, facilitated by FDM solutions, enable organizations to maximize the lifespan of their field devices. By identifying and addressing issues in their early stages, organizations can implement timely maintenance measures that prevent unnecessary wear and tear. This not only extends the life of assets but also optimizes the return on investment, making predictive maintenance a key driver in the decision to adopt FDM systems. One of the most significant challenges industries face is the cost associated with unplanned downtime. Predictive maintenance, powered by FDM, minimizes the risk of unexpected equipment failures. By continuously monitoring field devices and predicting when maintenance is required, organizations can schedule downtime strategically, reducing disruptions to production processes and enhancing overall operational efficiency. Traditional maintenance practices often follow fixed schedules, leading to unnecessary costs and downtime. Predictive maintenance, integrated with FDM systems, shifts the paradigm to condition-based maintenance. This approach allows organizations to perform maintenance activities based on the actual condition of field devices, optimizing resource utilization and reducing the overall cost of maintenance operations. Predictive

maintenance generates a wealth of data that organizations can leverage for informed decision-making. FDM systems serve as the conduit for this data, providing a centralized platform for analysis and interpretation. The insights gained from predictive maintenance data empower decision-makers to allocate resources effectively, plan for future maintenance needs, and optimize operational processes for greater efficiency.

## Integration of Industrial Internet of Things (IIoT)

The Fourth Industrial Revolution, marked by the rise of the Industrial Internet of Things (IIoT), is ushering in a new era of interconnected and intelligent industrial processes. As industries increasingly leverage IIoT technologies to enhance operational efficiency, the Global Field Device Management (FDM) Market is experiencing a significant surge. At the heart of IIoT is the seamless connectivity of devices and systems within industrial environments. FDM systems act as the bridge, facilitating the integration and communication between field devices and the broader IIoT infrastructure. This interconnectedness allows for real-time data exchange, enabling organizations to harness the full potential of IIoT in optimizing industrial processes. IIoT integration with FDM systems enables real-time monitoring of field devices. This capability is essential for capturing and analyzing data as it is generated. The continuous stream of real-time data empowers organizations with valuable insights into the performance, health, and status of field devices, facilitating data-driven decision-making and proactive maintenance strategies. The wealth of data generated by IIoT-enabled field devices is a goldmine for predictive maintenance. FDM systems leverage advanced analytics to sift through this data, identifying patterns and trends that signal potential issues. This predictive capability allows organizations to move from reactive to proactive maintenance, minimizing downtime and extending the lifespan of critical assets. The integration of IIoT with FDM systems contributes to enhanced operational efficiency by providing a holistic view of industrial processes. The ability to monitor and manage field devices in real-time ensures that operations are optimized for efficiency. IIoT-driven FDM solutions empower organizations to identify bottlenecks, streamline workflows, and implement agile adjustments to improve overall operational performance. IIoT integration extends the reach of FDM beyond physical boundaries. Organizations can remotely monitor and control field devices, enabling real-time adjustments and interventions. This capability is particularly valuable in industries with distributed operations, allowing for centralized management of field devices across multiple locations.

## Key Market Challenges

### Interoperability Issues

Interoperability issues pose significant challenges in the Global Field Device Management (FDM) Market, impacting the seamless integration and communication between field devices and management systems. The diverse landscape of field devices, manufactured by different vendors, often leads to compatibility issues, as each device may utilize proprietary protocols and communication standards. This lack of standardization complicates the interoperability between devices and FDM solutions, hindering efficient data exchange and management. The key challenges is ensuring interoperability between legacy devices and modern FDM platforms. Older field devices may lack support for standardized communication protocols or have limited connectivity options, making integration with FDM systems challenging. Additionally, the rapid pace of technological advancements in the field device industry further exacerbates interoperability issues, as new devices may introduce novel communication protocols or features that are not compatible with existing FDM solutions. Interoperability challenges extend beyond hardware compatibility to include software and data exchange standards. FDM solutions often utilize different data formats and protocols for device configuration, monitoring, and diagnostics, leading to fragmentation and siloed data. This fragmentation hampers data visibility, analysis, and decision-making, limiting the effectiveness of FDM systems in optimizing field operations. Addressing interoperability issues requires collaborative efforts from industry stakeholders, including device manufacturers, FDM providers, standards organizations, and regulatory bodies. Standardization of communication protocols, data formats, and interoperability guidelines is crucial to promote seamless integration and interoperability across heterogeneous devices and systems. Additionally, developing open-source solutions and interoperability frameworks can facilitate greater compatibility and flexibility in FDM deployments, enabling organizations to leverage diverse field devices while maximizing the benefits of FDM technology. Ultimately, overcoming interoperability challenges is essential to unlock the full potential of FDM solutions in improving operational efficiency, reliability, and performance in various industries.

## Data Privacy and Compliance

Data privacy and compliance are critical considerations in the Global Field Device Management (FDM) Market, as organizations grapple with the complexities of managing sensitive data collected from field devices while adhering to stringent regulatory requirements. With the proliferation of data generated by field devices, organizations must prioritize data privacy and compliance to mitigate risks and maintain trust with stakeholders. The primary challenges is navigating the complex landscape of data privacy regulations, such as the General Data Protection Regulation (GDPR) in the

European Union and the California Consumer Privacy Act (CCPA) in the United States. These regulations impose strict requirements on the collection, storage, processing, and sharing of personal and sensitive data, including data collected from field devices. Organizations must ensure compliance with these regulations to protect individual privacy rights and avoid costly fines and penalties. Managing data privacy and compliance becomes increasingly challenging as organizations operate across multiple jurisdictions with varying regulatory frameworks. Harmonizing data privacy practices and ensuring consistent compliance with diverse regulatory requirements can be a daunting task for multinational corporations and organizations with global operations. In addition to regulatory compliance, organizations must also address the inherent risks associated with data security and protection. Field devices and the data they generate are vulnerable to cybersecurity threats, such as hacking, malware, and data breaches. Implementing robust cybersecurity measures, such as encryption, access controls, and intrusion detection systems, is essential to safeguard sensitive data and prevent unauthorized access or disclosure. To effectively manage data privacy and compliance in the FDM Market, organizations must adopt a comprehensive approach that encompasses policies, procedures, technologies, and employee training. This includes conducting regular risk assessments, implementing privacy-enhancing technologies, and establishing clear guidelines for data handling and governance. By prioritizing data privacy and compliance, organizations can build trust with customers, partners, and regulators while minimizing the risk of data breaches and regulatory violations.

## Key Market Trends

### Adoption of Cloud-based Solutions

The adoption of cloud-based solutions is a significant trend shaping the Global Field Device Management (FDM) Market. Organizations across various industries are increasingly migrating from traditional on-premises FDM systems to cloud-based platforms due to several compelling advantages. Firstly, cloud-based solutions offer scalability, allowing organizations to easily expand or contract their FDM infrastructure based on changing needs and requirements. This scalability is particularly beneficial for industries experiencing rapid growth or fluctuations in demand, as it enables them to quickly scale up or down without significant upfront investments in hardware or infrastructure. Secondly, cloud-based FDM solutions provide greater flexibility and accessibility compared to on-premises systems. With cloud-based platforms, field device data is stored and managed in centralized repositories hosted on remote servers, enabling seamless access from anywhere with an internet connection. This accessibility allows field technicians and operators to remotely monitor and manage

field devices, perform diagnostics, and analyze data in real-time, improving operational efficiency and responsiveness. Cloud-based FDM solutions offer cost advantages over traditional on-premises deployments. Cloud-based platforms eliminate the need for organizations to invest in costly hardware, infrastructure maintenance, and software updates, as these responsibilities are outsourced to the cloud service provider. This pay-as-you-go pricing model allows organizations to pay only for the resources and services they consume, resulting in lower total cost of ownership and improved cost-effectiveness. Cloud-based FDM solutions facilitate seamless collaboration and data sharing across geographically dispersed teams and locations. By centralizing field device data in the cloud, organizations can ensure that all stakeholders have access to the same up-to-date information, fostering collaboration, decision-making, and problem-solving in real-time. The adoption of cloud-based solutions in the Global Field Device Management Market reflects a broader trend towards digital transformation and the leveraging of cloud technologies to improve operational efficiency, agility, and competitiveness in today's rapidly evolving business landscape.

### Remote Monitoring and Mobility

Remote monitoring and mobility are pivotal trends influencing the Global Field Device Management (FDM) Market, offering transformative capabilities for organizations across various industries. Remote monitoring enables real-time surveillance and management of field devices from virtually anywhere with internet connectivity. This capability allows organizations to monitor the performance and status of field devices remotely, facilitating proactive maintenance and troubleshooting to prevent downtime and optimize operational efficiency. Field technicians can access critical data, receive alerts, and initiate corrective actions remotely, reducing the need for on-site visits and minimizing response times to potential issues. The mobility solutions empower field technicians with access to FDM functionalities through mobile devices such as smartphones and tablets. These mobile applications provide field personnel with on-the-go access to FDM platforms, enabling them to view device data, perform diagnostics, and execute maintenance tasks while in the field. By leveraging mobility solutions, organizations can streamline field operations, improve technician productivity, and enhance customer service levels. Remote monitoring and mobility solutions promote greater flexibility and agility in field operations. Field technicians can quickly respond to alarms and alerts, assess device status, and take appropriate actions regardless of their physical location. This agility enables organizations to adapt to changing conditions and customer demands more effectively, resulting in improved operational resilience and customer satisfaction. Remote monitoring and mobility solutions contribute to cost savings and resource optimization. By reducing the need for on-site visits and travel



expenses, organizations can lower operational costs and allocate resources more efficiently. Moreover, improved asset uptime and reduced downtime translate into enhanced productivity and revenue generation opportunities. Remote monitoring and mobility solutions are driving significant advancements in the Global Field Device Management Market, empowering organizations to optimize field operations, improve operational efficiency, and deliver superior service experiences to customers. As organizations continue to prioritize agility and digital transformation, the adoption of remote monitoring and mobility solutions is expected to proliferate, further shaping the future of field device management.

## Segmental Insights

### Offering Insights

Based on the category of Offering, the global field device management market is experiencing a paradigm shift, with software emerging as the dominant offering. In an era characterized by digital transformation and Industry 4.0, businesses are increasingly recognizing the pivotal role that software plays in optimizing field device management processes. Software solutions offer unparalleled flexibility, scalability, and adaptability, allowing organizations to seamlessly integrate and manage diverse field devices across their operations. The robust capabilities of software, such as real-time monitoring, predictive maintenance, and remote diagnostics, empower businesses to enhance efficiency, reduce downtime, and ultimately achieve higher levels of productivity. Furthermore, the advent of cloud computing and the Internet of Things (IoT) has facilitated the remote management of field devices, making software solutions even more indispensable in the global landscape. As businesses prioritize agility and connectivity, software emerges as the cornerstone of modern field device management strategies, driving the market towards a software-centric future.

### Industry Insights

Process industries are poised to dominate the global field device management market due to their inherent complexity and the critical need for efficient control and monitoring systems. In sectors such as chemical manufacturing, oil and gas, pharmaceuticals, and food and beverage, where intricate processes and stringent regulatory requirements prevail, the demand for robust field device management solutions is paramount. The integration of advanced technologies, including Industrial Internet of Things (IIoT) and smart sensors, has become imperative for optimizing production, ensuring safety compliance, and achieving operational excellence. Process industries recognize that

effective field device management not only enhances overall operational efficiency but also contributes to cost reduction and risk mitigation. As these industries undergo digital transformation, the adoption of sophisticated software solutions for managing field devices becomes indispensable, enabling real-time data analytics, predictive maintenance, and seamless communication across the entire production ecosystem. In the competitive landscape of global industry, process industries are poised to lead the way in embracing and driving the evolution of field device management solutions.

## Regional Insights

North America is positioned to dominate the global field device management market owing to a combination of technological prowess, widespread industrialization, and a proactive approach toward adopting cutting-edge solutions. The region's robust infrastructure across various industries, including manufacturing, oil and gas, and utilities, creates a fertile ground for the implementation of advanced field device management systems. Moreover, North American businesses are at the forefront of embracing Industry 4.0 and the Industrial Internet of Things (IIoT), which necessitates sophisticated field device management solutions for seamless integration and operational optimization. The presence of key market players, coupled with a culture of innovation and a high level of awareness regarding the benefits of field device management, further contributes to the region's dominance. Additionally, stringent regulatory standards in industries such as healthcare and energy drive the demand for reliable and compliant field device management solutions, positioning North America as a frontrunner in shaping the trajectory of the global field device management market.

## Key Market Players

General Electric Co

Siemens AG

ABB Ltd

Emerson Electric Co

Aveva Group Ltd

Schneider Electric SE

STMicroelectronics Inc

Techno Systems Inc

Semiconductor Components Industries LLC

International Business Machines Corporation (IBM)

Report Scope:

In this report, the Global Field Device Management Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Field Device Management Market,By Offering:

- oHardware

- oSoftware

Field Device Management Market,By Communication Protocol:

- oFoundation Fieldbus and Hart

- oProfibus

- oProfinet

- oEthernet/I.P.

- oModbus

- oOthers

Field Device Management Market,By Deployment Type:

- oOn-Premises

- oCloud

## Field Device Management Market,By Industry:

- oDiscrete Industries

- oProcess Industries

## Field Device Management Market, By Region:

- oNorth America

  - United States

  - Canada

  - Mexico

- oEurope

  - Germany

  - United Kingdom

  - France

  - Italy

  - Spain

- oAsia-Pacific

  - China

  - Japan

  - India

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Field Device Management Market.

Available Customizations:

Global Field Device Management 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).

## Contents

### **1.PRODUCT OVERVIEW**

- 1.1.Market Definition
- 1.2.Scope of the Market
  - 1.2.1.Markets Covered
  - 1.2.2.Years Considered for Study
  - 1.2.3.Key Market Segmentations

### **2.RESEARCH METHODOLOGY**

- 2.1.Objective of the Study
- 2.2.Baseline Methodology
- 2.3.Key Industry Partners
- 2.4.Major Association and Secondary Sources
- 2.5.Forecasting Methodology
- 2.6.Data Triangulation Validation
- 2.7.Assumptions and Limitations

### **3.EXECUTIVE SUMMARY**

- 3.1.Overview of the Market
- 3.2.Overview of Key Market Segmentations
- 3.3.Overview of Key Market Players
- 3.4.Overview of Key Regions/Countries
- 3.5.Overview of Market Drivers, Challenges, Trends

### **4.VOICE OF CUSTOMER**

### **5.GLOBAL FIELD DEVICE MANAGEMENT MARKET OUTLOOK**

- 5.1.Market Size Forecast
  - 5.1.1.By Value
- 5.2.Market Share Forecast
  - 5.2.1. By Offering (Hardware, Software)
  - 5.2.2. By Communication Protocol (Foundation Fieldbus and Hart, Profibus, Profinet, Ethernet/I.P., Modbus, Others)
  - 5.2.3. By Deployment Type (On-Premises, Cloud)

- 5.2.4. By Industry (Discrete Industries, Process Industries)
- 5.2.5. By Region
- 5.2.6. By Company (2022)
- 5.3. Market Map
  - 5.3.1. By Offering
  - 5.3.2. By Communication Protocol
  - 5.3.3. By Deployment Type
  - 5.3.4. By Industry
  - 5.3.5. By Region

## **6. NORTH AMERICA FIELD DEVICE MANAGEMENT MARKET OUTLOOK**

- 6.1. Market Size Forecast
  - 6.1.1. By Value
- 6.2. Market Share Forecast
  - 6.2.1. By Offering (Hardware, Software)
  - 6.2.2. By Communication Protocol (Foundation Fieldbus and Hart, Profibus, Profinet, Ethernet/I.P., Modbus, Others)
  - 6.2.3. By Deployment Type (On-Premises, Cloud)
  - 6.2.4. By Industry (Discrete Industries, Process Industries)
  - 6.2.5. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Field Device Management Market Outlook
    - 6.3.1.1. Market Size Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share Forecast
      - 6.3.1.2.1. By Offering
      - 6.3.1.2.2. By Communication Protocol
      - 6.3.1.2.3. By Deployment Type
      - 6.3.1.2.4. By Industry
  - 6.3.2. Canada Field Device Management Market Outlook
    - 6.3.2.1. Market Size Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share Forecast
      - 6.3.2.2.1. By Offering
      - 6.3.2.2.2. By Communication Protocol
      - 6.3.2.2.3. By Deployment Type
      - 6.3.2.2.4. By Industry
  - 6.3.3. Mexico Field Device Management Market Outlook

- 6.3.3.1. Market Size Forecast
  - 6.3.3.1.1. By Value
- 6.3.3.2. Market Share Forecast
  - 6.3.3.2.1. By Offering
  - 6.3.3.2.2. By Communication Protocol
  - 6.3.3.2.3. By Deployment Type
  - 6.3.3.2.4. By Industry

## **7. EUROPE FIELD DEVICE MANAGEMENT MARKET OUTLOOK**

- 7.1. Market Size Forecast
  - 7.1.1. By Value
- 7.2. Market Share Forecast
  - 7.2.1. By Offering (Hardware, Software)
  - 7.2.2. By Communication Protocol (Foundation Fieldbus and Hart, Profibus, Profinet, Ethernet/I.P., Modbus, Others)
  - 7.2.3. By Deployment Type (On-Premises, Cloud)
  - 7.2.4. By Industry (Discrete Industries, Process Industries)
  - 7.2.5. By Country
- 7.3. Europe: Country Analysis
  - 7.3.1. Germany Field Device Management Market Outlook
    - 7.3.1.1. Market Size Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share Forecast
      - 7.3.1.2.1. By Offering
      - 7.3.1.2.2. By Communication Protocol
      - 7.3.1.2.3. By Deployment Type
      - 7.3.1.2.4. By Industry
  - 7.3.2. United Kingdom Field Device Management Market Outlook
    - 7.3.2.1. Market Size Forecast
      - 7.3.2.1.1. By Value
    - 7.3.2.2. Market Share Forecast
      - 7.3.2.2.1. By Offering
      - 7.3.2.2.2. By Communication Protocol
      - 7.3.2.2.3. By Deployment Type
      - 7.3.2.2.4. By Industry
  - 7.3.3. France Field Device Management Market Outlook
    - 7.3.3.1. Market Size Forecast
      - 7.3.3.1.1. By Value



- 7.3.3.2. Market Share Forecast
  - 7.3.3.2.1. By Offering
  - 7.3.3.2.2. By Communication Protocol
  - 7.3.3.2.3. By Deployment Type
  - 7.3.3.2.4. By Industry
- 7.3.4. Italy Field Device Management Market Outlook
  - 7.3.4.1. Market Size Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share Forecast
    - 7.3.4.2.1. By Offering
    - 7.3.4.2.2. By Communication Protocol
    - 7.3.4.2.3. By Deployment Type
    - 7.3.4.2.4. By Industry
- 7.3.5. Spain Field Device Management Market Outlook
  - 7.3.5.1. Market Size Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share Forecast
    - 7.3.5.2.1. By Offering
    - 7.3.5.2.2. By Communication Protocol
    - 7.3.5.2.3. By Deployment Type
    - 7.3.5.2.4. By Industry

## **8. ASIA-PACIFIC FIELD DEVICE MANAGEMENT MARKET OUTLOOK**

- 8.1. Market Size Forecast
  - 8.1.1. By Value
- 8.2. Market Share Forecast
  - 8.2.1. By Offering (Hardware, Software)
  - 8.2.2. By Communication Protocol (Foundation Fieldbus and Hart, Profibus, Profinet, Ethernet/I.P., Modbus, Others)
  - 8.2.3. By Deployment Type (On-Premises, Cloud)
  - 8.2.4. By Industry (Discrete Industries, Process Industries)
  - 8.2.5. By Country
- 8.3. Asia-Pacific: Country Analysis
  - 8.3.1. China Field Device Management Market Outlook
    - 8.3.1.1. Market Size Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share Forecast
      - 8.3.1.2.1. By Offering

- 8.3.1.2.2.By Communication Protocol
- 8.3.1.2.3.By Deployment Type
- 8.3.1.2.4.By Industry
- 8.3.2.Japan Field Device Management Market Outlook
  - 8.3.2.1.Market Size Forecast
    - 8.3.2.1.1.By Value
  - 8.3.2.2.Market Share Forecast
    - 8.3.2.2.1.By Offering
    - 8.3.2.2.2.By Communication Protocol
    - 8.3.2.2.3.By Deployment Type
    - 8.3.2.2.4.By Industry
- 8.3.3.India Field Device Management Market Outlook
  - 8.3.3.1.Market Size Forecast
    - 8.3.3.1.1.By Value
  - 8.3.3.2.Market Share Forecast
    - 8.3.3.2.1.By Offering
    - 8.3.3.2.2.By Communication Protocol
    - 8.3.3.2.3.By Deployment Type
    - 8.3.3.2.4.By Industry
- 8.3.4.Australia Field Device Management Market Outlook
  - 8.3.4.1.Market Size Forecast
    - 8.3.4.1.1.By Value
  - 8.3.4.2.Market Share Forecast
    - 8.3.4.2.1.By Offering
    - 8.3.4.2.2.By Communication Protocol
    - 8.3.4.2.3.By Deployment Type
    - 8.3.4.2.4.By Industry
- 8.3.5.South Korea Field Device Management Market Outlook
  - 8.3.5.1.Market Size Forecast
    - 8.3.5.1.1.By Value
  - 8.3.5.2.Market Share Forecast
    - 8.3.5.2.1.By Offering
    - 8.3.5.2.2.By Communication Protocol
    - 8.3.5.2.3.By Deployment Type
    - 8.3.5.2.4.By Industry

## **9.SOUTH AMERICA FIELD DEVICE MANAGEMENT MARKET OUTLOOK**

### **9.1.Market Size Forecast**

#### 9.1.1.By Value

### 9.2.Market Share Forecast

#### 9.2.1. By Offering (Hardware, Software)

#### 9.2.2.By Communication Protocol (Foundation Fieldbus and Hart, Profibus, Profinet, Ethernet/I.P., Modbus, Others)

#### 9.2.3.By Deployment Type (On-Premises, Cloud)

#### 9.2.4.By Industry (Discrete Industries, Process Industries)

#### 9.2.5.By Country

### 9.3.South America: Country Analysis

#### 9.3.1.Brazil Field Device Management Market Outlook

##### 9.3.1.1.Market Size Forecast

###### 9.3.1.1.1.By Value

##### 9.3.1.2.Market Share Forecast

###### 9.3.1.2.1.By Offering

###### 9.3.1.2.2.By Communication Protocol

###### 9.3.1.2.3.By Deployment Type

###### 9.3.1.2.4.By Industry

#### 9.3.2.Argentina Field Device Management Market Outlook

##### 9.3.2.1.Market Size Forecast

###### 9.3.2.1.1.By Value

##### 9.3.2.2.Market Share Forecast

###### 9.3.2.2.1.By Offering

###### 9.3.2.2.2.By Communication Protocol

###### 9.3.2.2.3.By Deployment Type

###### 9.3.2.2.4.By Industry

#### 9.3.3.Colombia Field Device Management Market Outlook

##### 9.3.3.1.Market Size Forecast

###### 9.3.3.1.1.By Value

##### 9.3.3.2.Market Share Forecast

###### 9.3.3.2.1.By Offering

###### 9.3.3.2.2.By Communication Protocol

###### 9.3.3.2.3.By Deployment Type

###### 9.3.3.2.4.By Industry

## **10.MIDDLE EAST AND AFRICA FIELD DEVICE MANAGEMENT MARKET OUTLOOK**

### 10.1.Market Size Forecast

#### 10.1.1.By Value

## 10.2. Market Share Forecast

10.2.1. By Offering (Hardware, Software)

10.2.2. By Communication Protocol (Foundation Fieldbus and Hart, Profibus, Profinet, Ethernet/I.P., Modbus, Others)

10.2.3. By Deployment Type (On-Premises, Cloud)

10.2.4. By Industry (Discrete Industries, Process Industries)

10.2.5. By Country

## 10.3. MEA: Country Analysis

10.3.1. South Africa Field Device Management Market Outlook

10.3.1.1. Market Size Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share Forecast

10.3.1.2.1. By Offering

10.3.1.2.2. By Communication Protocol

10.3.1.2.3. By Deployment Type

10.3.1.2.4. By Industry

10.3.2. Saudi Arabia Field Device Management Market Outlook

10.3.2.1. Market Size Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share Forecast

10.3.2.2.1. By Offering

10.3.2.2.2. By Communication Protocol

10.3.2.2.3. By Deployment Type

10.3.2.2.4. By Industry

10.3.3. UAE Field Device Management Market Outlook

10.3.3.1. Market Size Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share Forecast

10.3.3.2.1. By Offering

10.3.3.2.2. By Communication Protocol

10.3.3.2.3. By Deployment Type

10.3.3.2.4. By Industry

10.3.4. Kuwait Field Device Management Market Outlook

10.3.4.1. Market Size Forecast

10.3.4.1.1. By Value

10.3.4.2. Market Share Forecast

10.3.4.2.1. By Offering

10.3.4.2.2. By Communication Protocol

10.3.4.2.3. By Deployment Type

10.3.4.2.4.By Industry

## **11.MARKET DYNAMICS**

11.1.Drivers

11.2.Challenges

## **12.MARKET TRENDS DEVELOPMENTS**

12.1.Recent Development

12.2.Mergers Acquisitions

12.3.Product Launches

## **13.PORTER'S FIVE FORCES ANALYSIS**

13.1.Competition in the Industry

13.2.Potential of New Entrants

13.3.Power of Suppliers

13.4.Power of Customers

13.5.Threat of Substitute Products

## **14.COMPETITIVE LANDSCAPE**

14.1.General Electric Co

14.1.1.Business Overview

14.1.2.Product Offerings

14.1.3.Recent Developments

14.1.4.Financials (As Reported)

14.1.5.Key Personnel

14.1.6.SWOT Analysis

14.2.Siemens AG

14.3.ABB Ltd

14.4.Emerson Electric Co

14.5.Aveva Group Ltd

14.6.Schneider Electric SE

14.7.STMicroelectronics Inc

14.8.Techno Systems Inc

14.9.Semiconductor Components Industries LLC

14.10.International Business Machines Corporation (IBM)

## **15. STRATEGIC RECOMMENDATIONS**

## **16. ABOUT US DISCLAIMER**

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