

Industrial Communication Market – Global Industry Size, Share, Trends, Opportunity, and Forecast. Segmented By Offerings (Software, Hardware, Services), By Communication Protocol (Industrial Ethernet, Fieldbus, Wireless), By End User (Automotive and Transportation, Aerospace & Defense, Food & Beverages, Electrical & Electronics, Industrial Manufacturing, Others), By Region, By Company and By Geography, Forecast & Opportunities, 2018-2028.

<https://marketpublishers.com/r/ICD926ED2E4CEN.html>

Date: October 2023

Pages: 173

Price: US\$ 4,900.00 (Single User License)

ID: ICD926ED2E4CEN

Abstracts

The Global Industrial Communication Market was valued at USD 122.3 Billion in 2022 and growing at a CAGR of 9.4% during the forecast period. The Global Industrial Communication Market is experiencing significant growth as industries worldwide embrace digital transformation and automation. Industrial communication systems have become the backbone of modern manufacturing, enabling seamless connectivity and data exchange among machines, devices, and control systems. This market's expansion is driven by several factors, including the increasing adoption of Industry 4.0 practices, the need for real-time data sharing, and the demand for reliable and secure communication networks. Industries such as manufacturing, automotive, energy, and healthcare are deploying industrial communication solutions to enhance operational efficiency, reduce downtime, and improve overall productivity. With the rise of the Internet of Things (IoT) and the integration of smart sensors and devices, the demand for robust and scalable communication infrastructure is on the rise. Moreover, the ongoing development of wireless communication technologies, such as 5G, is further

fueling market growth, enabling high-speed, low-latency data transfer in industrial environments. As industries continue to prioritize digitalization and automation, the Global Industrial Communication Market is poised for sustained expansion, offering advanced solutions to meet the evolving connectivity needs of the industrial landscape.

Key Market Drivers

Rise of IoT and Remote Connectivity

The Global Industrial Communication Market is experiencing remarkable growth, primarily fueled by the widespread adoption of Internet of Things (IoT) technology and the escalating need for reliable remote connectivity. As industries across diverse sectors integrate IoT applications and deploy devices in challenging or remote environments, the demand for seamless and global connectivity has surged significantly. Industrial communication systems, a cornerstone of IoT deployments, play a pivotal role in ensuring real-time data exchange, remote monitoring, and effective management of assets dispersed across geographically diverse locations. The expanding IoT ecosystem is propelling the market's trajectory toward substantial growth. Given its integral role in satisfying the demands of remote connectivity, industrial communication solutions are poised to cater to the burgeoning requirements of industries seeking efficient and reliable communication for their IoT deployments. This trend underscores the indispensability of industrial communication in enabling seamless data exchange and operational oversight for remote assets, positioning the market for sustained expansion as IoT continues to permeate numerous sectors.

Global Coverage and Connectivity

The driving force behind the Industrial Communication Market lies in its intrinsic ability to provide comprehensive global coverage and seamless connectivity. Unlike conventional terrestrial communication networks that often struggle to ensure consistent coverage in remote or offshore areas, industrial communication systems, backed by satellite and wireless technologies, effectively overcome these limitations by ensuring uninterrupted communication flow regardless of geographical location. This distinct advantage is particularly crucial in sectors like maritime, oil and gas, and mining, where uninterrupted global connectivity is paramount for safety, operational efficiency, and decision-making. The remarkable advantage of offering pervasive coverage positions industrial communication solutions as an unwavering and indispensable communication alternative for enterprises venturing into remote or underserved regions. As businesses

expand their operations globally and into geographically challenging environments, the innate capability of industrial communication to bridge communication gaps across vast expanses becomes increasingly indispensable. This unique strength aligns perfectly with the objectives of businesses seeking continuous, reliable, and wide-reaching communication networks. The result is a paradigm shift in how enterprises across diverse sectors approach communication strategies, with industrial communication solutions leading the way, ensuring steadfast connectivity in the face of geographic constraints, and enhancing operational efficiency in scenarios demanding seamless global interconnection.

Emergency Response and Public Safety

The propulsion of the Industrial Communication Market is driven by the compelling need for efficient emergency response and enhanced public safety measures. Particularly during natural disasters, critical crises, or remote search and rescue operations, conventional communication infrastructure may falter. In such situations, industrial communication systems become pivotal, providing essential support to first responders, relief organizations, and governmental agencies, facilitating prompt and dependable communication when it is of paramount significance. These adept solutions coordinate rescue efforts, disseminate critical information, and establish communication hubs in areas lacking terrestrial network access. The tangible outcomes of this seamless communication include improved effectiveness in rescue operations and informed decision-making during critical times. In an environment marked by global incidents underscoring the pivotal role of swift and effective response strategies, industrial communication solutions retain their robust demand trajectory. This is anticipated to drive their widespread adoption across a diverse array of sectors, transcending boundaries and encompassing entities seeking to bolster their emergency response capabilities and enhance public safety measures through the use of this indispensable communication paradigm.

IoT Integration in Manufacturing

The integration of Internet of Things (IoT) technology within the manufacturing sector is a key driver shaping the dynamics of the Industrial Communication Market. In an industry where automation and data-driven processes are increasingly prevalent, the role of robust and reliable communication systems cannot be overstated. Industrial communication solutions respond adeptly to the evolving demand by providing the backbone for IoT deployments in manufacturing environments. These solutions enable seamless data exchange between machines, sensors, and control systems, facilitating

real-time monitoring, predictive maintenance, and process optimization. As the manufacturing industry continues its journey towards Industry 4.0, the convergence of IoT technology with industrial communication systems promises to redefine the landscape. The synergy between these realms is poised to usher in a new era of smart manufacturing, characterized by improved efficiency, reduced downtime, and enhanced product quality. Consequently, the advancement of industrial communication services and solutions as an instrumental enabler of Industry 4.0 initiatives stands as a defining trend within the manufacturing landscape, influencing how businesses harness IoT technology and seamless communication to drive operational excellence.

Key Market Challenges

Interoperability and Standards

The Global Industrial Communication Market faces a significant challenge in ensuring seamless technological integration and interoperability among various communication protocols and devices. As industries adopt diverse communication technologies, including fieldbuses, industrial Ethernet, and wireless systems, achieving compatibility and standardized communication becomes complex. Devices and systems need to interact seamlessly within complex industrial infrastructures that may involve different communication standards, leading to potential compatibility issues and communication breakdowns. Overcoming this challenge requires the development of common standards and interfaces that enable interoperability, simplifying the integration process for businesses adopting industrial communication solutions. Collaboration across industry stakeholders, standards bodies, and technology providers is essential to ensure a unified approach that addresses interoperability concerns and supports the diverse needs of customers.

Security and Cyber Threats

The challenge of ensuring robust cybersecurity within the Global Industrial Communication Market is of paramount importance. As industrial systems become increasingly connected, they become more vulnerable to cyberattacks and security breaches. Protecting critical infrastructure, manufacturing processes, and sensitive data from cyber threats is a significant challenge. Industrial communication networks must implement stringent security measures to safeguard against unauthorized access, data breaches, and disruptions to industrial operations. Addressing this challenge requires the deployment of advanced security technologies, intrusion detection systems, and comprehensive cybersecurity policies and practices. Manufacturers and solution

providers must prioritize security features and offer solutions that can withstand evolving cyber threats.

Scalability and Network Management

Managing the scalability and complexity of industrial communication networks poses a key challenge. As industries expand and adopt more connected devices and sensors, the challenge lies in ensuring that communication networks can efficiently scale while maintaining reliable performance levels. Achieving efficient network management, load balancing, and fault tolerance across industrial communication systems is complex, especially considering the diversity of devices and applications they support. Optimizing network performance while adapting to fluctuating demands requires sophisticated management tools, intelligent routing algorithms, and dynamic resource provisioning. Manufacturers and solution providers must continually innovate to address this challenge and provide businesses with industrial communication solutions that can seamlessly scale and deliver reliable performance across diverse scenarios.

Legacy System Integration

The challenge of integrating modern industrial communication solutions with existing legacy systems is a significant consideration for many industries. Many businesses have invested in older industrial equipment and communication technologies that may not be easily compatible with newer communication protocols and standards. Retrofitting legacy systems to work with modern communication networks can be complex and costly. Overcoming this challenge requires innovative gateway devices and protocols that bridge the gap between legacy and modern systems. Manufacturers and service providers must offer solutions and services that facilitate a smooth transition and integration process for businesses seeking to modernize their communication infrastructure while preserving existing investments.

Key Market Trends

IoT Integration and Industry 4.0 Adoption

A significant trend shaping the Global Industrial Communication Market is the integration of Internet of Things (IoT) technology and the widespread adoption of Industry 4.0 principles in manufacturing and industrial processes. Industries are increasingly leveraging IoT applications to enhance automation, monitor equipment health, and optimize operational efficiency. This trend drives the demand for robust and

reliable industrial communication networks that can seamlessly connect a multitude of IoT devices and sensors. Industrial communication solutions, including industrial Ethernet, fieldbuses, and wireless technologies, play a pivotal role in enabling real-time data exchange and control in smart factories. The convergence of IoT and Industry 4.0 with industrial communication is driving innovation in the market, leading to the development of advanced communication protocols, network architectures, and edge computing solutions that empower industries to achieve higher levels of automation, efficiency, and productivity.

5G Connectivity in Industrial Environments

The deployment of 5G connectivity in industrial environments is a transformative trend in the Global Industrial Communication Market. 5G technology offers low-latency, high-bandwidth, and reliable wireless communication, making it ideal for applications in industrial automation, robotics, and remote monitoring. Industries such as manufacturing, logistics, and energy are embracing 5G to enable real-time control and data exchange between machines and systems. This trend is driven by the need for faster and more responsive industrial networks that can support emerging technologies like autonomous robots and augmented reality for maintenance and training. The integration of 5G with industrial communication is set to unlock new possibilities in industrial settings, facilitating the transition to fully connected and automated smart factories.

Edge Computing and Decentralized Architectures

Edge computing and decentralized architectures are gaining prominence in the Global Industrial Communication Market. As industries seek to process data closer to the source for faster decision-making and reduced latency, edge computing nodes and edge devices are becoming essential components of industrial communication networks. This trend is driven by applications in industrial automation, autonomous vehicles, and critical control systems, where real-time data analysis and local decision-making are paramount. Industrial communication solutions are evolving to support edge computing, enabling distributed data processing and control logic at the network's edge. The integration of edge computing with industrial communication is poised to revolutionize industrial processes by enabling greater autonomy, responsiveness, and efficiency in a wide range of applications.

Cybersecurity and Network Resilience

The focus on cybersecurity and network resilience is a critical trend in the Global Industrial Communication Market. With the increasing connectivity of industrial systems, the risk of cyberattacks and network disruptions has grown significantly. Industries are prioritizing the implementation of robust cybersecurity measures and resilient network architectures to protect critical infrastructure and data. This trend drives the demand for industrial communication solutions with built-in security features, including encryption, authentication, and intrusion detection. Additionally, redundancy and fault-tolerant network designs are becoming standard practices to ensure network reliability. The emphasis on cybersecurity and network resilience underscores the importance of safeguarding industrial communication networks against evolving threats and vulnerabilities.

Segmental Insights

End User Insights

The Automotive and Transportation segment emerged as the dominant force in the Global Industrial Communication Market and is anticipated to maintain its dominance throughout the forecast period. This supremacy can be attributed to the ever-increasing integration of advanced communication technologies and automation within the automotive and transportation sectors. The demand for real-time data exchange, remote monitoring, and precise control systems has surged significantly in automotive manufacturing, autonomous vehicles, and intelligent transportation systems. Industrial communication solutions play a pivotal role in enabling seamless connectivity between vehicles, production lines, and transportation infrastructure. These solutions facilitate tasks such as vehicle-to-vehicle communication, predictive maintenance for fleets, and intelligent traffic management. As the automotive and transportation industries continue to advance towards autonomous and connected systems, the reliance on robust industrial communication networks is expected to intensify, solidifying the dominance of this segment. Furthermore, the ongoing development of electric vehicles, smart logistics, and connected mobility solutions further amplifies the importance of industrial communication, making the Automotive and Transportation segment a driving force in the market's sustained growth.

Communication Protocol Insights

The Industrial Ethernet segment asserted its dominance in the Global Industrial Communication Market and is poised to maintain this leading position throughout the forecast period. The ascendancy of Industrial Ethernet can be attributed to its versatility,

high-speed data transfer capabilities, and suitability for a wide range of industrial applications. Industries across the spectrum, from manufacturing to process automation, have embraced Industrial Ethernet as the preferred communication protocol due to its reliability and compatibility with modern industrial systems. The adoption of Ethernet-based solutions enables seamless integration of machinery and equipment into Industrial Internet of Things (IIoT) ecosystems, fostering real-time data exchange, remote monitoring, and precise control over manufacturing processes. Additionally, as industries strive for increased efficiency, reduced downtime, and enhanced production throughput, the demand for high-performance communication networks like Industrial Ethernet remains robust. The deployment of Industrial Ethernet for applications such as industrial robotics, machine vision, and smart factories further cements its dominance in the market. With the continuous evolution of industrial automation and the growing emphasis on digitalization, the Industrial Ethernet segment is expected to maintain its leadership position, offering reliable and high-speed communication solutions to meet the evolving needs of industrial sectors worldwide.

Offerings Insights

The Services segment established its dominance in the Global Industrial Communication Market and is anticipated to sustain this leading position throughout the forecast period. The Services segment's ascendancy is attributed to the increasing recognition of the critical role played by service providers in implementing, managing, and optimizing industrial communication networks. As industries undergo digital transformation and embrace complex communication solutions, the demand for specialized services, including network design, installation, maintenance, and consulting, has surged significantly. Service providers offer tailored solutions to address the unique communication requirements of various industrial sectors, ensuring seamless network operation, cybersecurity, and efficient troubleshooting. Moreover, the transition towards Industry 4.0 and the Industrial Internet of Things (IIoT) has heightened the need for expert services to integrate communication networks with emerging technologies and standards. Businesses are increasingly relying on service providers to navigate the evolving landscape of industrial communication, including the deployment of robust cybersecurity measures to protect critical infrastructure. As a result, the Services segment is expected to maintain its dominance, offering comprehensive and customized solutions that enable industries to harness the full potential of their communication networks while ensuring reliability, security, and scalability.

Regional Insights

Asia-Pacific region emerged as the dominant force in the Global Industrial Communication Market, and it is poised to continue its dominance during the forecast period. Asia-Pacific's leadership in this market can be attributed to several key factors. Firstly, the region is home to a significant portion of the world's manufacturing and industrial sectors, including automotive, electronics, and machinery, which are actively adopting advanced industrial communication solutions to enhance operational efficiency and automation. Secondly, rapid industrialization and infrastructure development in countries like China and India are driving the demand for industrial communication systems to support these expanding industries. Thirdly, there is a growing emphasis on Industry 4.0 adoption across Asia-Pacific, with businesses increasingly investing in digital transformation initiatives that rely on robust communication networks. Furthermore, the region boasts a strong presence of industrial automation and communication technology providers, both domestic and international, catering to the evolving needs of the industrial sector. Additionally, government initiatives and policies aimed at promoting smart manufacturing and technological innovation are fostering the adoption of industrial communication solutions in the Asia-Pacific region. With these dynamics in play, Asia-Pacific is expected to maintain its dominant position in the Global Industrial Communication Market, offering substantial growth opportunities for both established and emerging players in the industry.

Key Market Players

Siemens AG

ABB Ltd.

Schneider Electric SE

Rockwell Automation, Inc.

Mitsubishi Electric Corporation

Honeywell International Inc.

Belden Inc.

Omron Corporation

General Electric Co.

Cisco Systems, Inc.

HMS Industrial Networks

Advantech Co., Ltd.

Report Scope:

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

Global Industrial Communication Market, By Offerings:

Software

Hardware

Services

Global Industrial Communication Market, By Communication Protocol:

Industrial Ethernet

Fieldbus

Wireless

Global Industrial Communication Market, By End User:

Automotive and Transportation

Aerospace & Defense

Food & Beverages

Electrical & Electronics

Industrial Manufacturing

Others

Global Industrial Communication Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Industrial Communication Market.

Available Customizations:

Global Industrial Communication 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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