

Industrial Gearbox Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Helical, Planetary, Worm and Others), By Design (Parallel Axis, Angled Axis and Others), By End User (Material Handling, Automotive, Construction, Power Generation and Others), By Region, Competition 2018-2028

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Abstracts

Global Industrial Automation Market was valued at USD 208.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 11.19% through 2028.

The global Industrial Automation Market refers to the vast and diverse marketplace where advanced technologies and automated systems are developed, deployed, and utilized across various industries worldwide. This market encompasses a wide array of automation solutions, including robotics, artificial intelligence, control systems, sensors, and software, all aimed at optimizing and streamlining industrial processes. Industrial automation seeks to enhance efficiency, productivity, and precision in manufacturing, logistics, energy, and other sectors. It encompasses the application of cutting-edge technologies like the Internet of Things (IoT), machine learning, and data analytics to control and manage industrial machinery and processes. Key objectives of the global Industrial Automation Market include reducing operational costs, minimizing human intervention in hazardous environments, ensuring product quality, and meeting sustainability goals. It is a dynamic and rapidly evolving sector that plays a vital role in shaping the future of industries, making them more competitive and responsive to market demands.

Key Market Drivers

Advancements in Industrial Robotics and AI

The global industrial automation market is being significantly driven by the rapid advancements in industrial robotics and artificial intelligence (AI). As technology continues to evolve, industrial robots are becoming smarter, more versatile, and more cost-effective. These robots are capable of handling complex tasks with precision and efficiency, reducing the need for human intervention in various industrial processes. Artificial intelligence plays a crucial role in enhancing the capabilities of industrial robots. AI-powered robots can adapt to changing environments, make real-time decisions, and optimize production processes. Machine learning algorithms enable robots to learn from data and continuously improve their performance, making them indispensable in industries such as manufacturing, automotive, and logistics. The integration of AI and robotics also supports the emergence of collaborative robots or cobots. These robots can work alongside humans, increasing productivity and safety in manufacturing and assembly lines. The global industrial automation market is witnessing a surge in the adoption of these collaborative robots, especially in industries where human-robot collaboration is essential. Furthermore, AI-driven predictive maintenance is becoming a norm in industrial settings. By analyzing data from sensors and equipment, AI can predict when machines are likely to fail, allowing for timely maintenance and reducing downtime. This predictive approach not only improves operational efficiency but also extends the lifespan of industrial equipment. In conclusion, advancements in industrial robotics and AI are reshaping the industrial automation landscape. They are driving increased efficiency, productivity, and cost savings across various industries, making them a fundamental driver of the global industrial automation market's growth.

Industry 4.0 and the Internet of Things (IoT)

The global industrial automation market is experiencing a profound transformation driven by the convergence of Industry 4.0 principles and the Internet of Things (IoT). Industry 4.0 represents the fourth industrial revolution, characterized by the integration of digital technologies into industrial processes to create 'smart factories.' The IoT plays a pivotal role in this transformation by enabling the seamless connectivity of devices and equipment. IoT sensors and devices are being deployed extensively in industrial settings to collect real-time data on machinery, processes, and products. This data is then analyzed using advanced analytics and artificial intelligence, providing valuable insights into operations. These insights enable predictive maintenance, process optimization, and better decision-making. One of the key drivers of the global industrial

automation market is the increased adoption of IoT-enabled solutions for asset management. With IoT, manufacturers can monitor the condition and performance of their equipment remotely, ensuring efficient operation and reducing unplanned downtime. This results in significant cost savings and improved overall productivity. Additionally, IoT facilitates the creation of digital twins, virtual replicas of physical assets. These digital twins enable manufacturers to simulate and analyze processes, test changes, and identify potential issues before implementing them in the real world. This capability enhances product quality and reduces the time-to-market for new products. The integration of Industry 4.0 and IoT also promotes the concept of 'lights-out manufacturing,' where factories can operate autonomously with minimal human intervention. This not only reduces labor costs but also ensures continuous production, improving competitiveness. In summary, Industry 4.0 and the IoT are driving the global industrial automation market by enabling smarter, more connected, and efficient industrial processes. This trend is expected to continue as companies strive to stay competitive in the digital age.

Increasing Focus on Energy Efficiency and Sustainability

The global industrial automation market is witnessing a significant driver in the form of an increasing focus on energy efficiency and sustainability. With growing concerns about environmental impact and rising energy costs, industries worldwide are seeking ways to reduce their carbon footprint and operational expenses. Industrial automation technologies are playing a pivotal role in achieving these goals. Automated systems can optimize energy consumption by monitoring and controlling equipment and processes more efficiently than manual operation. For example, smart HVAC (Heating, Ventilation, and Air Conditioning) systems can adapt to real-time occupancy and environmental conditions, reducing energy waste. Furthermore, industrial automation solutions enable industries to adopt sustainable practices such as waste reduction and resource optimization. Advanced sensors and analytics help in monitoring and managing resource usage, leading to reduced waste production and more sustainable operations. The integration of renewable energy sources into industrial processes is another driver of the global industrial automation market. Automation systems can efficiently manage the incorporation of solar, wind, or other renewable energy sources into the production process, ensuring a consistent power supply while reducing reliance on fossil fuels. Sustainability also extends to supply chain management. Industrial automation solutions enable better tracking and optimization of logistics and transportation, leading to reduced emissions and lower environmental impact. In conclusion, the increasing emphasis on energy efficiency and sustainability is a significant driver of the global industrial automation market. As environmental regulations tighten and consumers

demand more eco-friendly products, industries are turning to automation to achieve their sustainability goals while improving their bottom line.

Growing Demand for Customization and Personalization

The global industrial automation market is being driven by a growing demand for customization and personalization in manufacturing and other industries. In today's highly competitive market, consumers are increasingly seeking products that are tailored to their specific needs and preferences. Industrial automation technologies enable manufacturers to meet this demand efficiently and cost-effectively. Automated production lines can be easily reconfigured to produce different product variants, allowing for rapid changes in production schedules. This flexibility is particularly valuable in industries like automotive, electronics, and consumer goods. Furthermore, automation enables mass customization, where each product is uniquely customized to the individual customer's requirements. This level of personalization is becoming increasingly important in sectors such as fashion and healthcare. The integration of advanced robotics and AI into manufacturing processes also supports customization. Robots can handle intricate tasks and work with a wide range of materials, making it easier to produce custom-designed products with precision. Automation also enhances the ability to gather and utilize customer data for product design and marketing. This data-driven approach enables companies to better understand consumer preferences and tailor their products accordingly, resulting in higher customer satisfaction and brand loyalty. In conclusion, the growing demand for customization and personalization is a significant driver of the global industrial automation market. As consumers continue to seek unique and tailored products, automation technologies are enabling manufacturers to meet these expectations efficiently and profitably.

Expansion of E-commerce and Last-Mile Delivery

The global industrial automation market is experiencing robust growth driven by the expansion of e-commerce and the increasing demand for efficient last-mile delivery solutions. The rise of online shopping has created a need for highly automated warehouses and logistics facilities to handle the growing volume of orders. Industrial automation plays a pivotal role in optimizing e-commerce operations. Automated systems for order picking, sorting, and packaging significantly increase the efficiency of fulfillment centers, reducing processing times and labor costs. This, in turn, allows e-commerce companies to offer faster and more cost-effective delivery options to customers. Moreover, the integration of robotics and AI into logistics and delivery processes is enhancing the last-mile delivery experience. Automated delivery robots

and drones can navigate urban environments and deliver packages quickly and accurately. These technologies are not only improving efficiency but also reducing the environmental impact of delivery operations. Additionally, the global pandemic accelerated the adoption of contactless delivery and curbside pickup, further emphasizing the need for automation in the e-commerce and logistics sectors. Customers now expect seamless and safe delivery experiences, which can be achieved through automation.

In conclusion, the expansion of e-commerce and the demand for efficient last-mile delivery are driving the global industrial automation market. As consumer preferences continue to evolve, automation technologies will play a critical role in meeting the demands of the modern e-commerce ecosystem.

Regulatory Compliance and Safety Standards

The global industrial automation market is being driven by increasing regulatory compliance requirements and safety standards across various industries. Governments and industry bodies worldwide are enacting stricter regulations to ensure worker safety, product quality, and environmental protection. Industrial automation technologies are crucial for achieving and maintaining compliance with these regulations. Automated systems can monitor and control processes with precision, reducing the likelihood of errors or safety breaches. For instance, in the pharmaceutical industry, automation ensures the accurate mixing and packaging of medications, complying with stringent quality control standards. Furthermore, automation solutions can help industries adhere to environmental regulations by optimizing resource usage, reducing emissions, and minimizing waste generation. This is particularly important in sectors like manufacturing and energy, where environmental concerns are paramount. Automation also plays a vital role in improving workplace safety. Robots and automated machinery can handle dangerous tasks, reducing the risk of accidents and injuries. Collaborative robots, in particular, enable safer human-robot interactions in manufacturing environments.

In conclusion, the increasing focus on regulatory compliance and safety standards is a significant driver of the global industrial automation market. Automation technologies are essential for industries seeking to meet these requirements while maintaining operational efficiency and competitiveness.

Government Policies are Likely to Propel the Market

Incentives for Research and Development (R&D)

Many governments around the world recognize the critical role of research and development (R&D) in driving innovation within the industrial automation market. To promote technological advancements, they implement policies that provide incentives for companies investing in R&D activities. These incentives typically come in the form of tax credits, grants, or subsidies for businesses engaged in developing new automation technologies. By offering financial support, governments aim to stimulate innovation and help companies stay competitive on a global scale. These policies encourage companies to invest in cutting-edge automation solutions, leading to improved productivity, cost savings, and job creation. Additionally, R&D incentives often extend to partnerships between academia and industry. Governments encourage collaborations between universities, research institutions, and businesses to facilitate the transfer of knowledge and accelerate the development of innovative automation technologies. In conclusion, government policies promoting incentives for R&D in the industrial automation market foster innovation, drive economic growth, and enhance a nation's competitiveness in the global market.

Industry-Specific Standards and Regulations

Government policies related to industry-specific standards and regulations play a pivotal role in shaping the global industrial automation market. These policies are designed to ensure the safety, quality, and reliability of automation technologies within specific sectors, such as manufacturing, healthcare, and energy. Governments collaborate with industry stakeholders to establish and update standards that address emerging challenges and opportunities in automation. These standards cover aspects such as cybersecurity, interoperability, and environmental sustainability, among others. For example, in the healthcare sector, government policies often dictate strict regulations on the use of automation in medical devices and procedures. These regulations ensure patient safety and the effectiveness of healthcare automation solutions. Similarly, in manufacturing, governments may set standards for robotic safety to protect workers and equipment. Furthermore, governments may incentivize compliance with these standards by offering certifications or financial incentives to companies that adhere to best practices in automation. These policies create a level playing field for businesses, ensure the quality of automation products, and enhance consumer confidence. In summary, government policies focused on industry-specific standards and regulations are essential for maintaining the integrity and safety of automation technologies in various sectors, thereby driving the global industrial automation market forward.

Investment in Workforce Training and Development

To harness the benefits of industrial automation effectively, governments implement policies aimed at upskilling and reskilling the workforce. These policies recognize that automation technologies are changing the nature of work, and a skilled workforce is essential for a thriving industrial automation market. Governments often collaborate with educational institutions and industries to provide training programs and vocational courses in areas related to automation. This can include robotics programming, data analytics, cybersecurity, and other relevant skills. Financial incentives and subsidies may be offered to both individuals and businesses to promote participation in these programs. Moreover, governments may encourage companies to invest in employee training and development through tax incentives or grants. This not only ensures that the workforce is equipped to operate and maintain automation systems but also helps mitigate job displacement concerns associated with automation. These policies also emphasize lifelong learning and adaptability, preparing workers for a rapidly evolving job market where automation skills are in high demand. In conclusion, government policies focused on workforce training and development are crucial for ensuring a skilled labor force capable of maximizing the benefits of industrial automation, thereby contributing to the growth of the global automation market.

Export Promotion and Trade Facilitation

Governments often play a significant role in promoting the global reach of their domestic industrial automation industries. To boost exports and international competitiveness, they implement policies aimed at trade facilitation and promotion. One common policy is the reduction of trade barriers, such as tariffs and export restrictions, for automation technology exports. This encourages domestic manufacturers to expand their reach into international markets. Additionally, governments may negotiate trade agreements that provide preferential treatment to their automation products in key markets. To support small and medium-sized enterprises (SMEs) within the automation sector, governments may offer financial incentives and export assistance programs. These initiatives can include grants for market research, trade show participation, and export-oriented training. Furthermore, governments may establish international partnerships and cooperation agreements to foster collaboration between domestic automation companies and foreign counterparts. These agreements can open doors to new markets and opportunities for technology transfer. In conclusion, government policies focused on export promotion and trade facilitation are instrumental in expanding the global footprint of domestic automation industries, boosting economic growth and creating jobs in the process.

Cybersecurity and Data Privacy Regulations

The increasing integration of digital technologies and connectivity in industrial automation has led to heightened concerns about cybersecurity and data privacy. Governments worldwide are responding with policies and regulations aimed at safeguarding critical infrastructure and sensitive data. Government policies in this context often require businesses to implement robust cybersecurity measures, conduct regular risk assessments, and adhere to data protection standards. Non-compliance can result in significant fines and legal consequences. Moreover, governments may establish cybersecurity certification programs for automation products and services. These certifications verify that a product or system meets specific security standards, instilling confidence in consumers and promoting trust in the technology. Additionally, governments may mandate the reporting of cybersecurity incidents, ensuring that companies promptly address and mitigate potential threats. These policies promote transparency and collaboration in the face of cyber threats. In conclusion, government policies addressing cybersecurity and data privacy are essential for protecting critical infrastructure and maintaining public trust in the industrial automation market. Compliance with these regulations enhances the overall security and resilience of automation technologies.

Sustainable Manufacturing Initiatives

Sustainability is a growing concern globally, and governments are increasingly focused on promoting sustainable practices within the industrial automation sector. These policies aim to reduce the environmental impact of manufacturing processes and encourage the adoption of eco-friendly automation technologies. One common policy involves providing incentives, tax breaks, or grants to companies that invest in sustainable automation solutions. These solutions may include energy-efficient machinery, waste reduction technologies, and environmentally friendly production processes. Governments may also set emission reduction targets and mandate the adoption of clean energy sources in manufacturing facilities. Automation plays a crucial role in optimizing energy consumption and achieving these targets, making it a central focus of sustainability policies. Furthermore, governments often collaborate with industry associations and research institutions to develop best practices for sustainable automation. These policies promote knowledge sharing and innovation in eco-friendly technologies.

In conclusion, government policies promoting sustainable manufacturing initiatives within the industrial automation sector are crucial for reducing environmental impact and

fostering a more eco-conscious approach to automation technology development and adoption.

Key Market Challenges

Integration Complexity and Compatibility Issues

One of the significant challenges facing the global industrial automation market is the complexity of integrating automation systems and the prevalence of compatibility issues. As automation technologies continue to evolve and diversify, companies often find themselves dealing with a myriad of systems, devices, and software from different manufacturers. Ensuring that these components work seamlessly together can be a daunting task. One of the root causes of integration complexity is the lack of universal standards in the automation industry. While there are some industry-specific standards and communication protocols, they do not cover every aspect of automation. This lack of standardization results in proprietary solutions, each with its own set of protocols and interfaces. When different components from various manufacturers need to communicate or work together, compatibility issues can arise. The consequences of integration complexity and compatibility issues are substantial. They can lead to project delays, increased costs, and reduced system performance. For instance, a manufacturer may invest in a new robotic system to automate assembly but struggles to integrate it with existing machinery due to compatibility issues. This can result in production downtime and financial losses. Furthermore, the complexity of integration can deter some companies from adopting advanced automation technologies altogether, especially small and medium-sized enterprises (SMEs) with limited resources. These challenges create a barrier to entry for businesses looking to embrace automation fully. To address this challenge, industry stakeholders, governments, and standards organizations need to work together to establish more comprehensive and standardized communication protocols and interfaces. Additionally, companies should carefully plan their automation strategies, considering compatibility issues and integration challenges from the outset.

Cybersecurity Vulnerabilities and Threats

As industrial automation becomes increasingly digitized and interconnected, one of the most critical challenges facing the global market is the growing concern over cybersecurity vulnerabilities and threats. With the rise of the Industrial Internet of Things (IIoT) and Industry 4.0, industrial systems and equipment are more susceptible to cyberattacks than ever before. One primary reason for this vulnerability is that many

industrial automation systems were originally designed with a focus on functionality and efficiency, often neglecting robust cybersecurity measures. Legacy systems, which may lack essential security features, are still prevalent in various industries. These systems can serve as entry points for cyberattacks. Additionally, the convergence of information technology (IT) and operational technology (OT) in industrial environments has blurred the lines between traditional IT networks and industrial control systems (ICS). As a result, cyber threats that were once limited to IT networks can now impact critical industrial processes. Cyberattacks on industrial automation can have severe consequences, including production disruptions, equipment damage, and safety risks. For example, a successful cyberattack on a power plant's control system could lead to power outages and widespread disruption. To address this challenge, both industry and governments must prioritize cybersecurity in industrial automation. Companies need to implement robust cybersecurity measures, such as network segmentation, intrusion detection systems, and regular security audits. They should also invest in employee training to raise awareness about cybersecurity threats. Governments can play a role by enacting and enforcing cybersecurity regulations specific to industrial automation. These regulations can require companies to adopt cybersecurity best practices and report cybersecurity incidents promptly. Collaboration between industry experts and government cybersecurity agencies is essential to staying ahead of evolving cyber threats in the industrial automation sector.

Segmental Insights

Hardware Insights

The hardware segment had the largest market share in 2022 & expected to maintain it in the forecast period. Industrial automation relies heavily on the physical components, devices, and machinery that form the backbone of automated systems. Hardware components include robots, sensors, actuators, motors, programmable logic controllers (PLCs), and other tangible assets. These devices are essential for controlling, monitoring, and executing tasks in manufacturing, logistics, and other industrial processes. Hardware components are responsible for the real-time control and execution of tasks. For instance, robots on an assembly line perform precise and repetitive tasks efficiently, enhancing production speed and consistency. PLCs control various machinery, ensuring they operate seamlessly within a predefined set of parameters. Sensors and data acquisition hardware play a crucial role in collecting data from industrial processes. These sensors measure variables such as temperature, pressure, speed, and quality, providing essential input for decision-making and process optimization. Hardware components are designed to withstand harsh industrial

environments, ensuring they function reliably over extended periods. This robustness is vital in industries where downtime can be costly and disruptive. Hardware is often designed with compatibility in mind, allowing different components from various manufacturers to work together cohesively. This interoperability ensures flexibility in building automation systems tailored to specific industry needs. Hardware investments typically have longer lifespans compared to software. Manufacturers and industries prefer durable hardware solutions with extended service lives, contributing to the sustained demand for hardware components. Hardware components often play a critical role in ensuring the safety and compliance of industrial processes. For instance, safety sensors and emergency stop systems are hardware elements that protect workers and assets.

Process Automation Insights

The Process automation segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Process automation is dominating the global industrial automation market for several compelling reasons. Firstly, it brings unprecedented efficiency to industrial processes. By automating repetitive and time-consuming tasks, it reduces the need for manual labor, minimizes errors, and ensures consistent, high-quality production. This leads to significant cost savings and improved productivity for businesses. Secondly, process automation enhances safety in industrial environments. It can handle hazardous or risky tasks, reducing the risk of accidents and injuries to human workers. This not only protects employees but also minimizes downtime and associated losses. Thirdly, the data-driven nature of process automation allows for better decision-making. Real-time monitoring and analytics provide valuable insights into operations, enabling companies to optimize processes, identify issues before they escalate, and adapt to changing market conditions swiftly. Additionally, process automation is highly scalable and adaptable. It can be implemented across various industries and applications, from manufacturing and energy production to healthcare and logistics. This versatility makes it a viable solution for a wide range of businesses seeking to stay competitive in a rapidly evolving global market. Furthermore, the rise of Industry 4.0 and the Internet of Things (IoT) has fueled the adoption of process automation. These technologies enable seamless connectivity between devices and systems, facilitating remote monitoring and control, predictive maintenance, and overall system integration.

Regional Insights

North America:

North America had the largest market for industrial automation in the global market in 2022. The growth of the market in North America is being driven by the following factors:

Increased demand for automation in manufacturing: The manufacturing industry in North America is highly automated. The increasing demand for automation in manufacturing is driving the growth of the industrial automation market in the region.

Growing adoption of Industry 4.0: North America is a leader in the adoption of Industry 4.0 technologies. The growing adoption of Industry 4.0 is driving the growth of the industrial automation market in the region.

Government regulations: Governments in North America are imposing stricter regulations on environmental pollution and safety. This is driving the adoption of automation in manufacturing to reduce emissions and improve safety.

Rising labor costs: Rising labor costs in North America are driving the adoption of automation in manufacturing to reduce labor costs.

Technological advancements: There are technological advancements in industrial automation, such as the use of new sensors and actuators. These advancements are making industrial automation systems more efficient and cost-effective.

Asia Pacific:

Asia Pacific had the fastest-growing market for industrial automation in the global market in 2022. The growth of the market in Asia Pacific is being driven by the following factors:

Rising labor costs: Rising labor costs in Asia Pacific are driving the adoption of automation in manufacturing to reduce labor costs.

Growing manufacturing industry: The manufacturing industry in Asia Pacific is growing rapidly. This is driving the growth of the industrial automation market in the region.

Government regulations: Governments in Asia Pacific are imposing stricter regulations on environmental pollution and safety. This is driving the adoption of automation in manufacturing to reduce emissions and improve safety.

Technological advancements: There are technological advancements in industrial automation, such as the use of new sensors and actuators. These advancements are making industrial automation systems more efficient and cost-effective.

Key Market Players

ABB Ltd

Emerson Electric Co. (U.S.)

Siemens AG

Rockwell Automation Inc. (U.S.)

Schneider Electric SE

Honeywell International Inc. (U.S.)

Mitsubishi Electric Corporation

Omron Corporation

Yokogawa Electric Corporation

Fanuc Corporation

Report Scope:

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

Industrial Automation Market, By Component:

Hardware

Software

Industrial Automation Market, By Industry:

Process Automation

Factory Automation

Machine Automation

Industrial Automation Market, By Vertical:

Pharmaceutical

Food & Beverage Machinery

Energy Equipment/Mining/Utilities

Packaging Machinery

Automotive

Textile/Fabric/Coating Machinery

Logistics and Transportation Equipment

Electrical/Electronic Manufacturing

Building Materials Machinery & Fluid Machinery

Machine Tool Industry

Plastics/Rubber Machinery

Industrial Robotics

Wood Working Machinery

Others

Industrial Automation Market, By Region:

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14. STRATEGIC RECOMMENDATIONS

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