

Industrial Networking Solutions Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented by Component (Hardware, Software and Services), Deployment Type (On-premises, Cloud), Network Type (Wired, Wireless), End-User Industry (Automotive, Financial and Banking Industry, Telecommunication, Manufacturing, Logistics, and Transportation), By Region, By Competition 2018-2028.

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Abstracts

Global Industrial Networking Solutions Market was valued at USD 10.92 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 20.27% through 2028. The industrial ecosystem is moving away from Fieldbus technologies based on proprietary networks for communication protocols over standard networking such as Ethernet, 802.11-based Wi-Fi, and the portfolio of I.P. protocols (for example, TCP and UDP). This focus on open networking standards is a foundational aspect of the devices that make up the industrial ecosystem are capable of communicating on converged, public networks, which significantly improves the accessibility of data and information. Also, there are many emerging network technologies currently being discussed or developed in the industry. Technologies such as Network Slicing (part of 5G), Software Defined Networking (SDN), Network Function Virtualization (NFV), and Low Power Wide Area Network (LPWAN) may provide better or different support for industrial applications.

Key Market Drivers Cy

Industry 4.0 and Digital Transformation

The Global Industrial Networking Solutions (INS) market is experiencing a profound and sustained surge, primarily catalyzed by the relentless wave of Industry 4.0 and the broader digital transformation sweeping across industrial sectors. These transformative trends are at the forefront of reshaping how industries operate, communicate, and leverage technology, making INS an indispensable component of this revolution. Industry 4.0, often referred to as the fourth industrial revolution, revolves around the integration of digital technologies, automation, and data-driven decision-making within industrial processes. It envisions a future where smart factories, smart supply chains, and interconnected systems streamline operations, boost efficiency, and enable quicker, data-informed decision-making. INS plays an instrumental role in making this vision a reality by serving as the backbone for communication and data exchange in this connected ecosystem.

As industries across the globe embark on their digital transformation journeys, they increasingly rely on INS to provide the necessary connectivity, bandwidth, and security to facilitate the seamless flow of data between machines, sensors, and control systems. This connectivity is a fundamental building block for the collection, analysis, and utilization of data in real-time, thereby enabling predictive maintenance, remote monitoring, and improved operational efficiency. Moreover, Industry 4.0 and digital transformation are propelling the adoption of the Internet of Things (IoT) and edge computing. These technologies are instrumental in creating 'smart' industrial environments, with sensors and devices feeding data to centralized systems for analysis and decision support. INS forms the vital link that ensures these diverse devices can communicate effectively and securely, making it an enabler for the IoT and edge computing revolution.

The push for increased automation, which is a key component of Industry 4.0 and digital transformation, necessitates advanced INS. These solutions allow for the orchestration of autonomous machines, robots, and AI-powered systems. This results in heightened operational efficiency, precision, and the ability to adapt rapidly to changing market demands. In conclusion, Industry 4.0 and digital transformation are the driving forces behind the robust growth of the Global Industrial Networking Solutions market. As industries continue their journey toward smarter, more interconnected and data-driven operations, the demand for robust, adaptable INS solutions is set to remain on an upward trajectory. INS will continue to be the linchpin that empowers businesses to unlock the full potential of Industry 4.0, ensuring they remain competitive and agile in an increasingly digital and connected world.

Increased Automation

The Global Industrial Networking Solutions (INS) market is experiencing significant growth, largely driven by the ever-increasing demand for automation in industrial settings. Automation is at the heart of modern industrial processes, and it relies heavily on robust networking solutions to connect and control the various components of automated systems. This trend towards increased automation is propelling the INS market forward in several critical ways. First and foremost, automation enhances operational efficiency and productivity. Through the integration of Industrial Internet of Things (IIoT) devices, robotics, and other automated machinery, manufacturers and industrial operators can optimize their processes, reduce manual labor, and achieve higher output levels. INS enables the seamless communication and coordination of these automated components, allowing for real-time monitoring, remote diagnostics, and predictive maintenance.

Additionally, increased automation addresses the growing need for cost reduction in industrial operations. By automating routine and repetitive tasks, companies can reduce labor costs, minimize errors, and optimize resource utilization. Industrial networking solutions play a pivotal role in ensuring that automation systems work harmoniously, thereby contributing to cost-efficiency and overall profitability. Automation is not only about efficiency and cost savings but also about enhancing safety. INS enables the deployment of safety systems, such as automated emergency shutdowns and monitoring of hazardous processes, thereby mitigating risks to human operators.

Furthermore, the need for automation goes beyond the four walls of the factory. It extends into logistics and supply chain management, where INS is used to track goods, optimize routes, and improve overall supply chain efficiency. In an era of e-commerce and global trade, these automation-driven solutions are essential for meeting customer demands and ensuring timely deliveries. Overall, increased automation is a driving force behind the growth of the Global Industrial Networking Solutions market. As industries across the globe recognize the benefits of automation, they are turning to INS to provide the connectivity and networking infrastructure necessary to support these initiatives. As the trend towards automation continues to gain momentum, the INS market is poised for sustained expansion, playing a pivotal role in the modernization of industrial processes and the realization of Industry 4.0's promises of increased efficiency and competitiveness.

Key Market Challenges

Cybersecurity Concerns

Cybersecurity concerns present a formidable obstacle to the growth and widespread adoption of Global Industrial Networking Solutions (INS). While INS plays a pivotal role in enhancing connectivity and data exchange in industrial environments, the increasing interconnectedness of these systems also exposes them to a higher risk of cyberattacks. This dilemma poses a significant challenge to the expansion of the INS market. First and foremost, industrial networks are attractive targets for malicious actors. A successful cyberattack on an industrial network can lead to dire consequences, including production disruptions, equipment damage, safety hazards, and financial losses. As a result, businesses are understandably cautious about embracing INS without robust security measures in place.

The evolving and sophisticated nature of cyber threats further compounds the problem. Threat actors continually adapt and refine their tactics, making it a constant struggle for INS providers to stay ahead in the cybersecurity game. The industrial sector is becoming a prime battleground for these cyber adversaries, as demonstrated by the increasing frequency and severity of attacks. Moreover, many industrial systems have a long lifespan and may rely on legacy equipment that was not designed with modern cybersecurity in mind. Retrofitting these systems to meet current security standards can be a daunting task, both in terms of cost and complexity. This poses a significant challenge for INS providers as they must find ways to secure these vulnerable entry points without disrupting operations.

Furthermore, the shortage of skilled cybersecurity professionals exacerbates the issue. Organizations need individuals well-versed in both industrial processes and modern cybersecurity to protect their networks effectively. The demand for these experts often exceeds the supply, making it difficult for businesses to adequately defend their systems against cyber threats. In conclusion, cybersecurity concerns are a critical hurdle for the Global Industrial Networking Solutions market. As industrial operations become more dependent on interconnected networks and data-driven technologies, the need for robust and adaptive security solutions is paramount. INS providers must invest heavily in cybersecurity research and development, educate their clients, and offer integrated security features to foster trust and mitigate these concerns. Only by addressing these challenges can the INS market continue to thrive in an environment where data and connectivity are essential, while safeguarding against potential cyber threats and their detrimental impact on industrial operations.

Interoperability Issues

Interoperability issues pose a substantial obstacle to the growth and development of the Global Industrial Networking Solutions (INS) market. As industries increasingly rely on INS to facilitate communication and data exchange in their operations, the seamless integration of diverse equipment and systems becomes critical. However, the challenge of ensuring that these various components work together efficiently remains a significant impediment to the expansion of the INS market. One of the primary challenges in the industrial sector is the prevalence of equipment from different vendors and generations. These devices often employ various communication protocols and standards, making it difficult to establish universal compatibility. INS solutions must navigate this complex landscape and ensure that data can flow seamlessly between these disparate systems. Moreover, as new technologies and innovations emerge, the issue of backward compatibility can arise. Older equipment may not support the latest networking protocols, creating further interoperability challenges. For industries with substantial investments in legacy systems, the need to incorporate these older assets into modern INS networks can become a daunting task.

The lack of standardized communication protocols exacerbates the problem. Without universal guidelines for how devices should communicate, INS providers must invest substantial resources in developing solutions that bridge the interoperability gap. This investment can increase the cost and complexity of INS implementations for businesses. The consequences of interoperability issues are significant. Inefficient communication between devices and systems can result in data silos, missed opportunities for automation, and operational inefficiencies. Moreover, it can hinder the realization of Industry 4.0's promise of a fully connected and data-driven industrial landscape.

Efforts are being made to address interoperability challenges. Standardization organizations, such as the Industrial Internet Consortium (IIC) and the OPC Foundation, are working on developing common protocols and frameworks. However, achieving widespread adoption of these standards takes time and cooperation from industry stakeholders. In conclusion, interoperability issues are a substantial roadblock to the growth of the Global Industrial Networking Solutions market. Overcoming this challenge requires concerted efforts from INS providers, equipment manufacturers, and industry bodies to establish and adhere to common standards. As industries continue to modernize and adopt INS solutions, the ability to seamlessly integrate diverse equipment and systems will be crucial for achieving the full potential of these networking solutions and the broader objectives of Industry 4.0 and digital transformation.

Legacy Infrastructure Integration

Legacy infrastructure integration stands as a formidable challenge that threatens to impede the progress and growth of the Global Industrial Networking Solutions (INS) market. In many industrial settings, a significant portion of the equipment and systems in use is built on older technologies, posing a considerable obstacle to the adoption of modern INS solutions. One of the most pressing issues is the incompatibility between legacy systems and modern networking standards. Older equipment often relies on proprietary or outdated communication protocols that are incompatible with contemporary INS technology. Integrating these systems into an INS framework requires substantial effort, customization, and sometimes even the development of bespoke solutions, which can be both costly and complex.

Furthermore, legacy infrastructure often lacks the necessary computing power, memory, and connectivity features to participate in modern INS networks effectively. These limitations can hinder data transmission, real-time monitoring, and interoperability, thus reducing the potential benefits of adopting INS. Cost is another significant concern. Industrial enterprises have often invested heavily in their legacy infrastructure, and ripping out or replacing this equipment can be cost-prohibitive. Therefore, adapting these older systems to work within an INS framework while maintaining the integrity of ongoing operations is a formidable challenge that requires strategic planning and financial investment.

Security is another issue. Older equipment may lack the robust security features necessary to protect against modern cyber threats. Integrating legacy systems into an INS network can expose these systems to vulnerabilities and heighten the risk of data breaches or operational disruptions. Moreover, maintenance and support for legacy systems can become increasingly challenging as these systems age, particularly if original manufacturers have ceased production or support. This complicates the task of ensuring the longevity and reliability of legacy equipment within an INS ecosystem.

Addressing legacy infrastructure integration challenges requires a combination of innovative solutions and a careful, phased approach to modernization. Retrofitting and upgrading legacy systems to meet modern INS requirements is one strategy, but it can be costly and time-consuming. Implementing gateways and protocol converters to bridge the gap between old and new systems is another approach. Collaboration between INS providers, industrial enterprises, and legacy system vendors is essential to develop effective strategies for integrating older equipment into modern INS networks.

In conclusion, legacy infrastructure integration is a significant hurdle facing the Global Industrial Networking Solutions market. Businesses and INS providers must navigate this challenge by adopting flexible and adaptive solutions, promoting industry standards, and implementing carefully planned strategies to modernize their existing systems while preserving the value of their legacy investments. Only by successfully addressing these integration issues can industries fully leverage the benefits of modern INS solutions in their operations.

Key Market Trends

5G Connectivity

The advent of 5G connectivity is poised to be a transformative force driving the Global Industrial Networking Solutions (INS) market. As the fifth generation of wireless technology, 5G offers unprecedented speed, low latency, and high reliability, making it a game-changer for industrial applications. Enhanced Data Exchange: 5G's ultra-fast speeds allow for real-time data exchange, which is crucial for industrial processes. This enables the seamless communication of data between machines, sensors, and control systems, facilitating more precise monitoring and decision-making.

Low Latency: The minimal latency of 5G networks is a game-changer for time-sensitive applications, such as autonomous machinery and remote control systems. It enables near-instantaneous responses, which is essential for industries where split-second decisions can impact operations. **Support for IoT and Edge Computing:** 5G supports the proliferation of IoT devices and edge computing, which are integral to Industry 4.0. Industrial environments are increasingly adopting IoT sensors and edge devices to collect and analyze data, and 5G provides the necessary infrastructure for these technologies.

Scalability: 5G networks are highly scalable, which is crucial for industries that need to accommodate a growing number of devices and sensors. As businesses expand and their networking requirements evolve, 5G can easily scale to meet these needs.

Augmented Reality (AR) and Virtual Reality (VR): 5G opens the door to immersive technologies like AR and VR in industrial settings. These technologies offer remote training, maintenance, and troubleshooting capabilities, providing efficiency gains and cost savings.

Global Connectivity: 5G is being deployed globally, which benefits companies with international operations. They can leverage the consistent, high-speed connectivity to

streamline their supply chains and operations on a global scale. In conclusion, 5G connectivity is a key driver for the Global Industrial Networking Solutions market, revolutionizing the way industries approach automation, data exchange, and decision-making. As 5G infrastructure continues to expand, the INS market will find even greater relevance in helping businesses leverage this technology to stay competitive and thrive in an increasingly connected and data-driven industrial landscape.

Wireless and Mobile Connectivity

Wireless and mobile connectivity are emerging as pivotal drivers of the Global Industrial Networking Solutions (INS) market. As industries seek more flexible and dynamic networking solutions, the adoption of wireless and mobile technologies is growing exponentially, fueling the demand for INS. **Flexibility and Mobility:** Wireless and mobile connectivity free industrial operations from the constraints of physical cabling, providing the flexibility and mobility required for modern industrial settings. Workers can access data and control equipment from remote locations, enhancing efficiency and convenience.

Cost-Effective Solutions: Implementing wireless networks can be more cost-effective than traditional wired systems, as it eliminates the need for extensive cabling and infrastructure. Mobile devices, such as tablets and smartphones, are readily available and cost-effective tools for data access and control. **IoT Integration:** The Internet of Things (IoT) relies heavily on wireless communication. IoT devices are pervasive in industrial settings, and INS must support the connectivity and data exchange these devices require. Wireless networking is ideal for the growing number of sensors and smart devices.

Scalability: Wireless networks are highly scalable, adapting easily to changing industrial needs. As the number of devices and sensors increases, wireless INS can accommodate these changes without the constraints of physical connections. **Remote Monitoring and Control:** Wireless and mobile connectivity enable remote monitoring and control of industrial processes and equipment. This capability is crucial for industries seeking to reduce downtime, improve maintenance, and enhance operational efficiency.

Enhanced Safety: Mobile devices allow for the real-time monitoring of safety systems and equipment, providing immediate alerts and responses to potential hazards, contributing to a safer working environment.

Reduced Installation Time: The absence of physical cabling and infrastructure means

that wireless and mobile INS solutions can be implemented more quickly and with less disruption to ongoing operations. In summary, wireless and mobile connectivity are poised to drive the Global Industrial Networking Solutions market by offering a versatile, cost-effective, and efficient approach to networking. As industries continue to embrace the advantages of wireless and mobile INS, they are better positioned to improve productivity, scalability, and safety while accommodating the ever-growing needs of modern industrial environments.

Segmental Insights

End-User Industry Insights

Manufacturing segment will dominate the market, Manufacturing undergoes improvement and optimization programs throughout the lifecycle of the products being manufactured. The trend is that the process improvements need to be performed quite frequently and nearly continuously in some cases. More and more IIoT sensors are being added to the existing operations to achieve more efficient process improvement. For instance, the U.S. Food and Drug Administration (FDA) has guided manufacturers to adopt a risk-based approach to meeting product quality and regulatory requirements through Process Analytic Technology (PAT). A core part of PAT is continuous inline monitoring of the process that engages in transforming the raw materials into end products. This monitoring technique requires additional instruments and sensors for the process, and the new sensors will require industrial networks to communicate with the control systems.

Regional Insights

Asia Pacific is expected to dominate the market during the forecast period. Asia-Pacific is expected to witness the fastest growth during the forecast period, owing to the rapid development of the network infrastructure. Moreover, this region has seen robust initiatives to upsurge the industrial networking infrastructure in different countries. Backed by positive and proactive government support, China is betting big on the IIoT and, being one of the world's largest economies, operators as well as other vendors in the ecosystem, are helping to accelerate the delivery of compelling and secure industrial networking solutions including Low Power Wide Area networks, such as NB-IoT and LTE-M, which are helping to usher in innovative new services across China.

Key Market Players

Cisco Systems, Inc.

Juniper Networks, Inc.

Dell EMC (Dell Technologies Inc.)

Rockwell Automation, Inc.

Sierra Wireless, Inc.

Huawei Technologies Co. Ltd

Aruba Networks HPE

Eaton Corporation

Nokia Corporation

ABB Ltd

Report Scope:

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

Global Industrial Networking Solutions Market, By Component:

Hardware

Software and Services

Global Industrial Networking Solutions Market, By Type of Connectivity:

Wired

Wireless

Global Industrial Networking Solutions Market, By Deployment Type:

On-premises

Cloud

Global Industrial Networking Solutions Market, By End-User Industry:

Automotive

Financial and Banking Industry

Manufacturing

Telecommunication

Logistics and Transportation

Other

Global Industrial Networking Solutions Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Industrial Networking Solutions Market.

Available Customizations:

Industrial Networking Solutions Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmen...

Global Industrial Networking Solutions 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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