

PC Based Automation Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Components (HMIs, SCADA, PLC, DCS, Others), By Offerings (Hardware, Software, Others), By Sales Channel (Direct Sales, Indirect Sales), By Industry (Discrete Industry, Process Industry), By Region, By Competition, 2018-2028

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Abstracts

Global PC Based Automation Market was valued at USD 32.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.19% through 2028.

The PC-Based Automation market refers to a dynamic and rapidly evolving sector within the broader industrial automation industry. It centers around the utilization of personal computers (PCs) as the core control and monitoring devices in various industrial and manufacturing processes. These PCs are equipped with specialized software and hardware components, allowing them to efficiently automate and supervise complex industrial operations, such as production lines, robotics, and data analysis.

Key characteristics of the PC-Based Automation market include flexibility, scalability, and the integration of cutting-edge technologies, making it highly adaptable to various industries and applications. PC-based automation systems have gained prominence due to their ability to facilitate real-time data processing, connectivity with Internet of Things (IoT) devices, and enhanced human-machine interaction.

This market encompasses a wide range of products and solutions, including industrial PCs, software platforms, data analytics tools, and communication interfaces. It plays a

pivotal role in enabling Industry 4.0 initiatives, smart manufacturing, and the digital transformation of industries by providing the computational power and connectivity needed for optimized, data-driven decision-making. The PC-Based Automation market is essential for enhancing productivity, quality, and efficiency in the modern industrial landscape, and it continues to experience robust growth and innovation as industries seek to remain competitive and technologically advanced.

Key Market Drivers

Technological Advancements and Industry 4.0

Technological advancements are a primary driver of the global PC-Based Automation market. Industry 4.0, characterized by the integration of digital technologies into industrial processes, has propelled the adoption of PC-based automation systems. These systems harness the power of high-performance computing, advanced software solutions, and real-time data processing to enhance manufacturing and industrial operations.

Industry 4.0 emphasizes the collection and analysis of data to optimize processes, reduce downtime, and improve product quality. With the integration of the Internet of Things (IoT), automation systems can connect various devices and sensors, enabling smart decision-making. This digital transformation has reshaped the manufacturing landscape, and PC-Based Automation plays a pivotal role in its execution.

Flexibility and Scalability

Flexibility and scalability are key drivers of the PC-Based Automation market. Unlike traditional automation systems, which often require significant reconfiguration when production processes change, PC-based systems are highly adaptable. They can be reprogrammed with ease to accommodate new processes or product lines.

Scalability is another significant advantage. Businesses can start with a basic PC-based automation system and expand it as their operations grow. This adaptability ensures that companies can respond quickly to market changes and remain competitive.

Cost-Efficiency

Cost-efficiency is a compelling factor driving the global PC-Based Automation market. PC-based systems are typically more cost-effective than traditional PLC-based

solutions. This cost-effectiveness stems from the use of standard, off-the-shelf hardware, which is more affordable than proprietary components. Moreover, PC-based systems can run multiple applications on a single platform, reducing the need for separate control hardware for different processes.

Maintenance costs are also lower, as updates and repairs can often be carried out in-house. This financial advantage makes PC-based automation an attractive choice for small and medium-sized enterprises seeking to bolster their automation capabilities without breaking the bank.

Enhanced Human-Machine Interaction

Human-Machine Interaction (HMI) has become increasingly vital in modern industrial automation. PC-based automation systems offer superior HMI capabilities, enabling operators to interact with machinery more intuitively and effectively. Features like touchscreen interfaces, 3D visualization, and augmented reality applications provide operators with a comprehensive view of the manufacturing process.

Improved HMI not only boosts productivity but also reduces the risk of errors and accidents. Operators can monitor and control machinery with greater precision, diminishing downtime and enhancing overall safety.

The Proliferation of IoT

The widespread adoption of the Internet of Things (IoT) is a significant driver of the PC-Based Automation market. IoT devices can be seamlessly integrated into PC-based systems, facilitating real-time data collection and analysis. This connectivity enables predictive maintenance, remote monitoring, and process optimization.

IoT also opens the door to innovative automation solutions such as smart factories and connected supply chains. As industries embrace these IoT-driven approaches, the demand for PC-based automation solutions continues to surge.

Global Embrace of Smart Manufacturing

The global shift towards smart manufacturing is a potent driver for the PC-Based Automation market. Smart manufacturing leverages advanced technologies like automation, data analytics, and artificial intelligence to create highly efficient and adaptable production processes.

PC-based automation systems are integral to smart manufacturing, providing the computational power and flexibility required to implement and manage these technologies. Manufacturers worldwide are recognizing the benefits of smart manufacturing, which drives the demand for PC-based automation solutions, enabling this transformative approach to production.

In summary, the global PC-Based Automation market is being driven by technological advancements, cost-efficiency, flexibility, improved HMI, IoT integration, and the worldwide transition towards smart manufacturing. These drivers collectively shape the future of industrial automation, equipping businesses with the tools they need to remain competitive and agile in an increasingly complex and data-driven industrial landscape.

Government Policies are Likely to Propel the Market

Tax Incentives for Automation Adoption

Government policies that offer tax incentives for businesses adopting PC-Based Automation are a powerful driver for the industry. Tax breaks, deductions, or credits can significantly reduce the financial burden associated with investing in automation technology. These incentives can encompass tax credits for research and development (R&D) expenses, accelerated depreciation for automation equipment, or reduced corporate taxes for firms that demonstrate a commitment to automation.

Such policies promote technology adoption and innovation, encouraging companies to upgrade their production processes with PC-based automation systems. They not only stimulate economic growth but also increase the competitiveness of businesses on a global scale. Moreover, by incentivizing automation, governments can address labor market challenges related to workforce aging and skill shortages.

Standards and Regulations for Data Security

Government policies pertaining to data security standards and regulations are crucial in the context of PC-Based Automation. As automation systems increasingly rely on data exchange and connectivity, safeguarding sensitive information is paramount. Governments can implement policies that set cybersecurity standards for automation systems, ensuring the secure transmission, storage, and processing of data.

These policies help in building trust within the industry and among consumers, which is

especially important in sectors like critical infrastructure, healthcare, and finance, where data breaches can have severe consequences. By enforcing cybersecurity standards and regulations, governments promote the adoption of PC-based automation technologies and protect their economies from potential cyber threats.

Research and Development (R&D) Grants

Government policies that provide research and development (R&D) grants play a significant role in driving innovation within the PC-Based Automation market. By allocating funds to support automation technology research, governments encourage the development of cutting-edge solutions, fostering the growth of domestic automation companies.

R&D grants can cover a wide range of expenses, including product development, software engineering, and the creation of automation prototypes. Such policies stimulate technological advancements and foster collaboration between the public and private sectors. They also contribute to the development of a highly skilled workforce, further strengthening a country's position in the global automation industry.

Export Promotion and Trade Policies

Government policies aimed at promoting exports and facilitating international trade are instrumental in the global PC-Based Automation market. Export promotion policies can include tax incentives for exporters, streamlined customs procedures, and the negotiation of trade agreements that facilitate the flow of automation equipment and technology between countries.

By reducing trade barriers and making it easier for businesses to export their automation solutions, governments can help domestic companies expand their reach to global markets. These policies foster economic growth, job creation, and the exchange of knowledge and technology, ultimately contributing to the development of a robust and competitive PC-Based Automation sector.

Workforce Development and Training Initiatives

Government policies that invest in workforce development and training are crucial to the success of the PC-Based Automation market. Automation technologies require a skilled workforce to operate and maintain them effectively. Governments can allocate resources to fund vocational training programs, educational partnerships with industry,

and initiatives that upskill workers in automation-related fields.

By doing so, they address the skills gap and ensure that their labor force is adequately prepared to work with PC-based automation systems. These policies not only support the growth of the automation industry but also enhance the employability of their citizens, contributing to overall economic development.

Environmental and Sustainability Regulations

In the era of increased environmental awareness, government policies that promote sustainability and environmental responsibility are key drivers in the PC-Based Automation market. Regulations may require businesses to adopt energy-efficient automation systems or to adhere to specific environmental standards in their operations.

These policies encourage the development and adoption of PC-Based Automation solutions that reduce energy consumption, waste, and environmental impact. They are in line with international efforts to mitigate climate change and conserve resources, and they drive innovation in the automation sector to meet these sustainability goals.

In conclusion, government policies significantly influence the global PC-Based Automation market. These policies range from tax incentives and standards for data security to R&D grants, export promotion, workforce development initiatives, and environmental regulations. When effectively designed and implemented, these policies stimulate innovation, economic growth, and the adoption of PC-Based Automation technologies, ultimately contributing to the advancement of industries and economies.

Key Market Challenges

Cybersecurity Risks and Vulnerabilities

One of the foremost challenges confronting the global PC-Based Automation market is the increasing prevalence of cybersecurity risks and vulnerabilities. As automation systems become more interconnected and reliant on the exchange of data, they become lucrative targets for cyberattacks. The consequences of a successful breach can be severe, ranging from financial losses to safety and operational risks.

Several factors contribute to the cybersecurity challenge in PC-Based Automation:

Connectivity: The growing use of the Internet of Things (IoT) and the integration of automation systems with enterprise networks have expanded the attack surface. More entry points mean more opportunities for cybercriminals to exploit vulnerabilities.

Legacy Systems: Many industrial facilities still operate with legacy PC-based automation systems, which may lack the latest security features and updates. These systems are more susceptible to exploitation.

Awareness and Training: The lack of cybersecurity awareness and training among employees and operators is another challenge. Human error remains a significant factor in successful cyberattacks.

Evolving Threat Landscape: Cyber threats are constantly evolving, with new attack vectors and malware emerging regularly. Staying ahead of these threats is a perpetual challenge.

Addressing these cybersecurity challenges requires a multi-faceted approach. Governments, industries, and manufacturers must work together to establish robust cybersecurity standards and regulations for automation systems. Organizations need to invest in regular cybersecurity training and awareness programs for their employees. Regular updates and patches must be applied to legacy systems, and new systems should be designed with security in mind from the outset. Furthermore, ongoing threat monitoring and incident response plans are essential to detect and mitigate potential threats promptly.

Integration and Interoperability

Integration and interoperability challenges are another critical obstacle facing the global PC-Based Automation market. While PC-based automation systems offer flexibility and advanced features, they need to work seamlessly with existing infrastructure and technologies. Achieving this harmonious integration can be complex and costly.

Key factors contributing to this challenge include:

Diverse Ecosystems: Industries employ a wide range of automation equipment and systems, often from different vendors. Ensuring that these systems can communicate effectively and share data is a complex task.

Legacy Systems: Many companies still rely on legacy equipment, which might not be

inherently compatible with modern PC-based automation solutions. Adapting or retrofitting these systems can be expensive and time-consuming.

Data Silos: Inefficient data sharing and storage practices can lead to data silos, where valuable information remains trapped in isolated systems, hindering real-time decision-making and optimization.

Standardization: Lack of standardization in data formats and communication protocols can impede interoperability efforts.

To address these challenges, industry stakeholders must collaborate to establish industry-specific standards and protocols for interoperability. Manufacturers should design systems with open architectures that can easily connect with other technologies. Comprehensive integration plans that address legacy systems, data management, and compatibility issues are necessary. Additionally, companies should invest in data analytics tools and platforms to bridge the gap between different systems, extracting value from data that might otherwise be trapped in silos.

In conclusion, the global PC-Based Automation market faces significant challenges related to cybersecurity risks and vulnerabilities, as well as integration and interoperability issues. These challenges are complex, but with the right strategies and investments in technology, training, and collaboration, they can be addressed to ensure the continued growth and success of the PC-Based Automation sector.

Segmental Insights

Software Insights

The Software segment held the largest Market share in 2022. PC-Based Automation systems rely on software to provide the brains and decision-making capabilities. This software can range from control algorithms and supervisory control and data acquisition (SCADA) systems to more advanced solutions for data analytics and machine learning. These software platforms enable automation systems to function, making them a cornerstone of the automation process. Software allows for a high degree of customization to meet the specific needs of different industries and applications. It can be tailored to handle various tasks and adapt to changing requirements. This flexibility is crucial in diverse industrial settings where processes can vary significantly. The modern industrial landscape demands real-time data processing for informed decision-making. Automation software processes data collected from sensors and IoT devices, allowing

operators to make immediate adjustments, optimize processes, and reduce downtime. Automation software facilitates seamless connectivity with other systems, both within and beyond the industrial environment. This integration is vital for Industry 4.0 initiatives and smart manufacturing, where data exchange between machines, enterprise systems, and even supply chains is critical. Software-based automation systems can be easily scaled up or upgraded with minimal hardware changes. This scalability makes them a cost-effective solution for businesses looking to expand their automation capabilities as they grow. Automation software often enables remote monitoring and control, allowing operators to manage processes from different locations. This capability is increasingly important in today's globalized and digitally connected world. Software solutions typically have a lower upfront cost compared to hardware. They can run on standard personal computers, which are widely available and cost-effective. Additionally, software can be updated and maintained more affordably than hardware components. With software, it's easier to roll out updates and improvements, enhancing the efficiency and security of automation systems. This adaptability ensures that PC-Based Automation systems can stay at the forefront of technological advancements.

Discrete Industry Insights

The Discrete Industry segment held the largest Market share in 2022. The discrete manufacturing industry heavily relies on automation to enhance productivity and efficiency. Industrial robots, CNC machines, and automated assembly lines are prevalent in this sector. PC-Based Automation plays a vital role in controlling and optimizing these automation systems, making it a foundational technology for discrete manufacturing. Discrete manufacturing, which includes industries such as automotive, electronics, and aerospace, requires a high degree of precision and consistency in production processes. PC-Based Automation systems can provide the level of control and accuracy needed for tasks like part machining, assembly, and quality control. The discrete industry often involves the production of a wide range of products with varying specifications. PC-Based Automation systems are highly customizable and adaptable, allowing manufacturers to reprogram and reconfigure their systems to meet the specific requirements of different products and production runs. PC-Based Automation can significantly improve product quality by reducing human error and ensuring that manufacturing processes are carried out consistently. This not only enhances product quality but also reduces waste and rework, contributing to higher productivity. The discrete industry is increasingly embracing data-driven decision-making. PC-Based Automation systems enable real-time data collection and analysis, providing valuable insights into production performance. This data can be used to optimize processes, reduce downtime, and make informed decisions. Global competition in the discrete

industry has intensified. Manufacturers are constantly seeking ways to improve efficiency and reduce costs. PC-Based Automation helps them remain competitive by streamlining operations and reducing the total cost of production. PC-Based Automation systems are relatively easy to integrate into existing manufacturing setups. This means that companies can adopt this technology without the need for a complete overhaul of their production facilities. The discrete industry has been at the forefront of adopting technological advancements, and PC-Based Automation aligns well with this trend. These systems can incorporate the latest advancements, such as IoT integration, Industry 4.0 principles, and advanced data analytics, to further enhance operations.

Regional Insights

North America

North America was the largest market for PC-based automation, accounting for over 30% of the global market share in 2022. The growth of the PC-based automation market in North America is being driven by the increasing demand for industrial automation solutions in the manufacturing, food and beverage, and oil and gas industries.

The North American PC-based automation market is dominated by the United States, which accounts for over 80% of the regional market share. Other key markets in North America include Canada and Mexico.

The North American PC-based automation market is highly competitive, with a mix of established players and new entrants. The key players in the North American PC-based automation market include Rockwell Automation, GE Digital, and Siemens.

Europe

Europe was the second-largest market for PC-based automation, with a market share of over 25% in 2022. The growth of the PC-based automation market in Europe is being driven by the increasing adoption of digital manufacturing technologies and the growing popularity of cloud-based automation solutions.

The European PC-based automation market is dominated by Germany, which accounts for over 25% of the regional market share. Other key markets in Europe include the United Kingdom, France, and Italy.

The European PC-based automation market is also highly competitive, with a mix of established players and new entrants. The key players in the European PC-based automation market include Siemens, ABB, and Schneider Electric.

Asia-Pacific

Asia-Pacific is the fastest-growing market for PC-based automation, with a high CAGR in the upcoming years. The growth of the PC-based automation market in Asia-Pacific is being driven by the rapid industrialization and infrastructural development in the region.

The Asia-Pacific PC-based automation market is dominated by China, which accounts for over 40% of the regional market share. Other key markets in Asia-Pacific include Japan, South Korea, and India.

The Asia-Pacific PC-based automation market is the fastest-growing market in the world, driven by the rapid industrialization and infrastructural development in the region. The key players in the Asia-Pacific PC-based automation market include Mitsubishi Electric, Panasonic, and Siemens.

Key Market Players

Siemens AG

General Electric Company

Mitsubishi Electric Corporation

Schneider Electric SE

Rockwell Automation Inc.

ABB Ltd.

OMRON Corporation

Advantech Co. Ltd.

Honeywell International Inc.

Emerson Electric Co.

Report Scope:

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

PC Based Automation Market, By Components:

HMI

SCADA

PLC

DCS

Others

PC Based Automation Market, By Offerings:

Hardware

Software

Others

PC Based Automation Market, By Sales Channel:

Direct Sales

Indirect Sales

PC Based Automation Market, By Industry:

Discrete Industry

Process Industry

PC Based Automation Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global PC Based Automation Market.

Available Customizations:

Global PC Based Automation 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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