

Europe Process Instrumentation Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/EC3BAF2BCB48EN.html>

Date: April 2026

Pages: 164

Price: US\$ 3,450.00 (Single User License)

ID: EC3BAF2BCB48EN

Abstracts

The Europe Process Instrumentation Market is projected to grow significantly, reaching an estimated US\$ 7,992.7 million by 2031, up from US\$ 5,392.7 million in 2024. This growth represents a compound annual growth rate (CAGR) of 6.1% from 2025 to 2031.

Executive Summary and Market Analysis

The European market encompasses several key countries, including Germany, France, the UK, Italy, Russia, and other regions. A notable trend in this market is the increasing adoption of Industry 4.0 principles, alongside the integration of advanced technologies such as the Internet of Things (IoT) and Artificial Intelligence (AI). These technologies are enhancing industrial automation, enabling data-driven decision-making, and optimizing processes across various sectors.

Prominent players in the European process instrumentation market, such as Siemens AG, Filter, Process Instruments UK Ltd., and M?ller Industrie-Elektronik GmbH, are actively providing innovative solutions. These companies are also focusing on obtaining certifications to build customer trust and promote the adoption of cybersecurity-integrated process instrumentation. For instance, Siemens has achieved the Tand?V Sand?D certification based on IEC 62443-4-1 and 4-2, underscoring the critical importance of cybersecurity in industrial automation. By being the first to secure this certification for both process and product compliance, Siemens sets a high standard that may encourage other manufacturers to follow suit. This trend is driving demand for secure-by-design instrumentation, cybersecure control systems, and certified automation components, making cybersecurity compliance a competitive necessity in the market.

Market Drivers and Challenges

European industries are grappling with rising energy costs, stringent environmental regulations, and increasing competition from global markets. These challenges compel manufacturers, utilities, and process industries to enhance productivity while minimizing resource consumption, downtime, and operational waste. Furthermore, Europe's commitment to sustainability and carbon neutrality amplifies the need for highly efficient and optimized operations. In response, market players are launching innovative solutions. For example, in January 2024, ABB introduced its ABB Ability BeerMaker intelligent process automation control solution for the hot block stage of brewing, followed by a technology solution for the cold block stage, aimed at improving operational efficiency and facilitating the adoption of digital solutions in breweries.

The pharmaceutical and biotechnology sectors in Europe are also experiencing rapid growth due to increasing healthcare demands. According to the European Federation of Pharmaceutical Industries and Associations (EFPIA), the pharmaceutical industry's production reached approximately US\$ 390 billion in 2023, up from around US\$ 363 billion in 2022. This growth drives a strong demand for high-precision, regulatory-compliant process instrumentation, which is essential for ensuring product quality, sterility, and operational efficiency.

Market Segmentation

The Europe Process Instrumentation Market can be segmented by technology, application, and country:

By Technology: The market is divided into Flow Meters, Pressure and Temperature Sensors, Analytical Instruments, and Level Meters. Flow Meters are expected to hold the largest market share in 2024.

By Flow Meter: This segment includes Mass Flow, Electromagnetic Flow (EMF), Vortex, Ultrasonic, and others, with Ultrasonic Flow Meters leading the market share in 2024.

By Level Meter: The Level Meter segment comprises High Frequency Radar, Time Domain Reflectometry (TDR), and others, with TDR expected to dominate in 2024.

By Application: The market is segmented into Oil and Gas, Energy and Power,

Water and Wastewater, Food and Beverage, Marine, Petrochemical, Chemical, and others, with the Chemical sector holding the largest share in 2024.

Market Outlook

The growing need for energy efficiency is a significant driver for the process instrumentation market. As energy costs rise and environmental concerns become more pressing, businesses are increasingly focused on improving their processes. Companies are striving to enhance productivity, reduce operational costs, and minimize energy consumption. Process instrumentation plays a crucial role in various industries by monitoring and optimizing energy usage, manufacturing processes, and equipment performance. These instruments provide real-time data on energy consumption, enabling better management and optimization, which leads to reduced energy waste. For instance, flow meters accurately measure liquid or gas flow, allowing for adjustments that optimize usage, while temperature and pressure sensors monitor energy-intensive processes to enhance control and minimize waste.

Country Insights

The market is also analyzed by country, with Germany holding the largest share in 2024. Germany is recognized for its leadership in wastewater treatment, with over 96% of household and public wastewater being treated. The country processes more than 5 billion cubic meters of sewage and an additional 3 billion cubic meters of rainwater annually, necessitating advanced sensors, flow meters, and monitoring systems to manage these volumes effectively and ensure regulatory compliance. According to Germany Trade and Invest, the country is a European leader in industrial production, contributing over 20% to its GDP. This robust industrial base, supported by advanced research and development, skilled labor, and strong infrastructure, drives the demand for process instrumentation technologies essential for automation, precision control, and efficiency across various manufacturing sectors.

Company Profiles

Key players in the Europe Process Instrumentation Market include ABB Ltd, Schneider Electric SE, Emerson Electric Co, Honeywell International Inc, Siemens AG, Yokogawa Electric Corp, Fuji Electric Co Ltd, ENDRESS + HAUSER GROUP SERVICES AG, Metso Outotec Corp, and Brooks Instrument. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to

deliver innovative products and enhance their market presence.

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