

South & Central America Industrial Automation Control Market Size and Forecast (2021 - 2031)

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Abstracts

The South and Central America Industrial Automation Control Market is projected to grow significantly, reaching an estimated US\$ 11,124.2 million by 2031, up from US\$ 6,144.4 million in 2024. This growth represents a compound annual growth rate (CAGR) of 8.9% from 2025 to 2031.

Executive Summary and Market Analysis

In recent years, South America has witnessed remarkable technological advancements that have positively influenced the economies of key players like Brazil and Argentina. These advancements have been accompanied by ongoing infrastructure developments, which have contributed to rising disposable incomes among consumers. A notable trend in the region is the increasing adoption of robotics, as businesses strive to overcome operational challenges and boost productivity. This trend is particularly pronounced in sectors such as aerospace, automotive, and transportation & logistics, driven by substantial investments in industrial automation.

A significant development occurred in March 2024 when Stellantis announced a historic investment plan for the South American market, amounting to US\$ 6.1 billion (R\$ 30 billion) between 2025 and 2030. This investment is the largest in the history of the Brazilian and South American automotive sectors and aims to support the launch of over 40 new products, the development of innovative Bio-Hybrid technologies, and the implementation of decarbonization solutions throughout the automotive supply chain. This strategic move underscores Stellantis' leadership in the region and its commitment to providing clean, safe, and affordable mobility solutions. Such investments are expected to significantly contribute to the growth of the industrial automation control market in South America.

Strategic Insights

Market Segmentation Analysis

The South and Central America Industrial Automation Control Market can be segmented based on various criteria:

By System: The market is divided into SCADA (Supervisory Control and Data Acquisition), DCS (Distributed Control Systems), PLC (Programmable Logic Controllers), PLM (Product Lifecycle Management), and others. In 2024, SCADA held the largest market share.

By End Users: The market is categorized into Process Industry and Discrete Industry, with the Discrete Industry holding the largest share in 2024.

By Process Industry: This segment includes Oil and Gas, Chemical, Pharmaceutical, Food and Beverage, and others, with Oil and Gas leading in market share in 2024.

By Discrete Industry: This includes Automotive, Electronics and Semiconductor, Manufacturing, Aerospace and Defense, and others, where the Automotive sector dominated in 2024.

Market Outlook

The penetration of industrial automation control is accelerating in industries beyond automotive, which have historically been underpenetrated compared to the automotive sector. The increasing functionality of equipment, particularly industrial robots, is expected to drive further adoption in non-automotive industries. In January 2025, Brazil launched its national industrial digital transformation initiative, Miss?o 4: Ind?stria e Revolu??o Digital, with an investment of US\$ 32 billion. This program aims to leverage IoT, AI, and big data to modernize Brazil's manufacturing and industrial sectors, connecting the country with global technology supply chains and supporting both traditional and emerging industries through automation.

The rapid expansion of industrial automation control is being fueled by advancements in AI, robotics, and IoT, which are enhancing efficiency and transforming workflows across

various sectors. This trend presents significant growth opportunities as automation becomes a critical component of modernization efforts in the industrial market.

Country Insights

The South and Central America Industrial Automation Control Market is further segmented by country, with Brazil, Argentina, and the Rest of South & Central America being the primary regions. Brazil accounted for the largest market share in 2024.

Brazil, as one of the largest and most populous countries globally, exhibits considerable regional disparities in its manufacturing sector and automation levels. Despite being the 12th largest economy in the world, Brazil ranks 20th in robot installations, according to the International Federation of Robotics. While global robot installations surged by 31% in 2021, Brazil's growth rate was a modest 7%. The automotive industry in Brazil leads the way in adopting industrial robots, accounting for 47% of all operational robots in the country. As the adoption of industrial robots accelerates across various industries, the region is expected to experience positive growth in the industrial automation control market.

Company Profiles

Key players in the South and Central America Industrial Automation Control Market include ABB Ltd, Emerson Electric Co, Honeywell International Inc, Rockwell Automation Inc, Siemens AG, OMRON Corp, Yokogawa Electric Corp, Hitachi Ltd, Mitsubishi Electric Corp, Bosch Rexroth AG, Kawasaki Heavy Industries Ltd, and GE Vernova Inc. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their product offerings and increase market share.

In conclusion, the South and Central America Industrial Automation Control Market is poised for significant growth, driven by technological advancements, strategic investments, and the increasing adoption of automation across various industries.

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