



GCC Industrial Automation Market – Whitepaper for SPS Automation

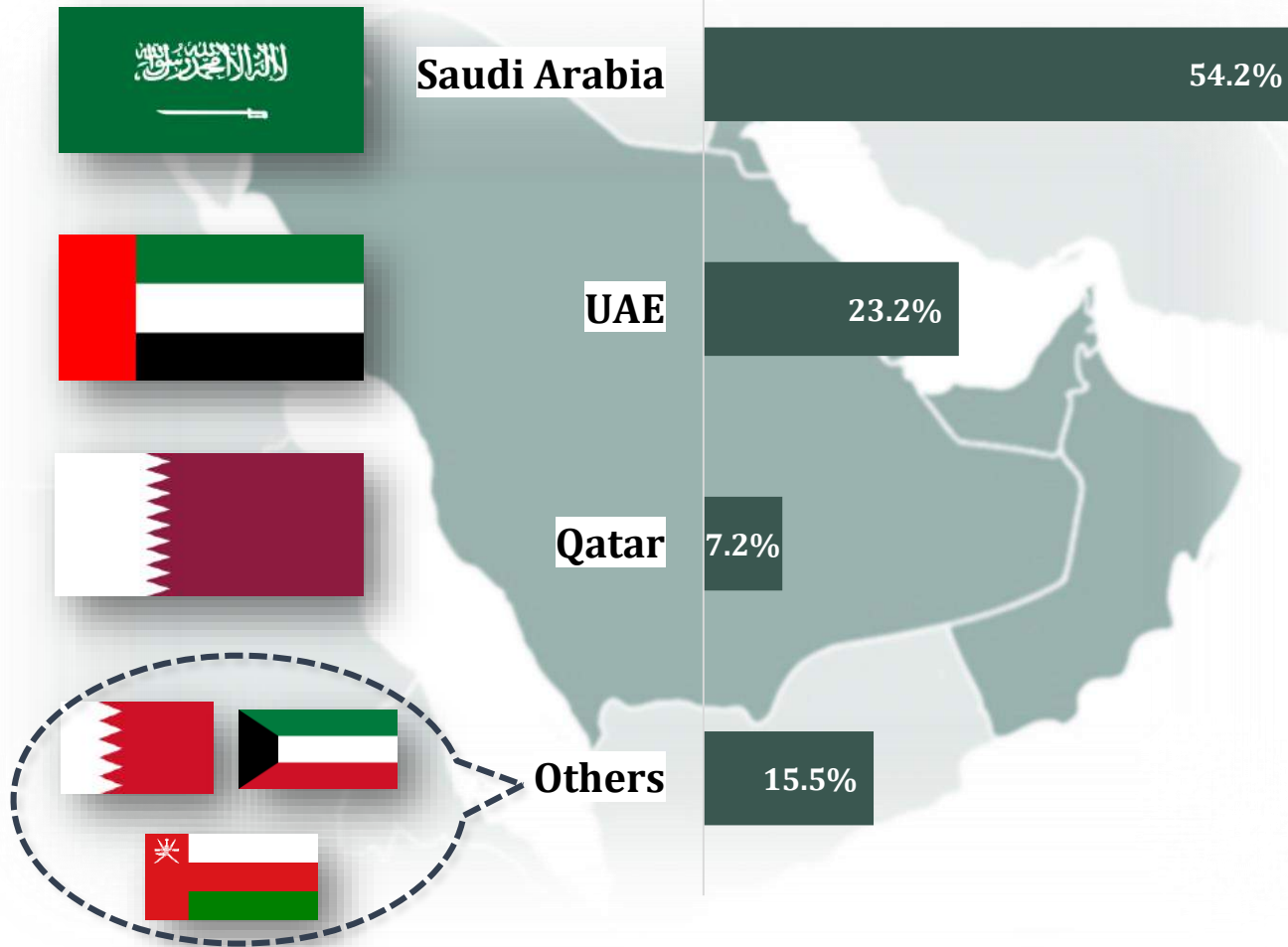


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Partnering Growth

sps automation
MIDDLE EAST

GCC Industrial Automation Market Overview

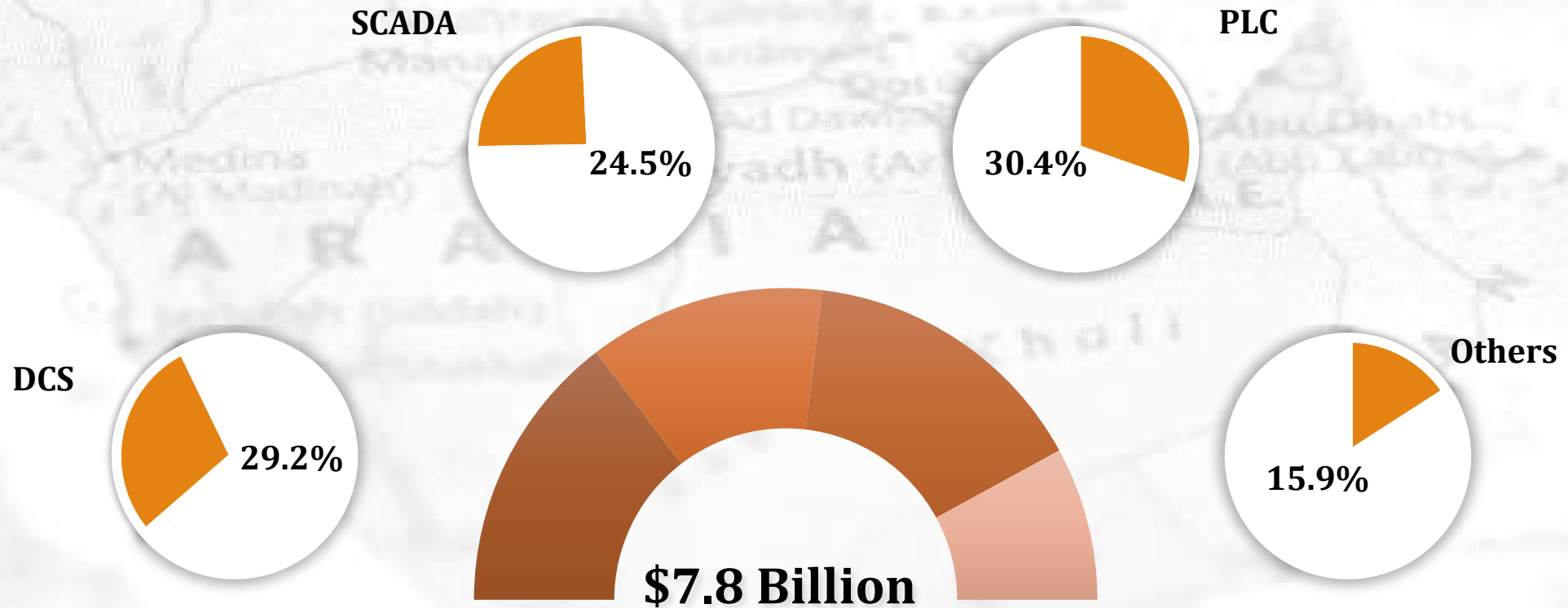
Overall GCC Market in 2018 → **\$7.8 Billion**



- *GCC industrial automation market is buoyed by growing initiatives to expand manufacturing sector, need to automate the processes, increase operational efficiency, etc. In the overall GCC industrial automation market, Saudi Arabia accounted for majority of the revenue share and is expected to witness growth on the back of government emphasis on diversifying the non-oil sectors including manufacturing sector. Vision 2030 and National Transformation Program (NTP) would be the key programs, which would drive future growth of the market.*
- *During 2015-17, GCC recorded low demand for industrial automation systems due to slow down registered in GCC economies owing to oil crises and many projects were put on hold in the region. However, the market improved post 2018 on account of recovery of oil prices and initiatives to diversify the non-oil sectors.*

GCC Industrial Automation Market Overview, By Technology

GCC consist of predominantly oil producing nations and is a hub of big industrial units producing chemicals, petro-chemicals etc. In GCC industrial automation market, major market share is captured by the distributed control system (DCS) and programmable logic controller (PLC) as these are dedicated systems used in manufacturing processes for chemical, petrochemical, water treatment, water management, food processing etc. However, in others category the industrial IOT would witness decent growth in the forecast period. IOT has huge potential in industrial automation as it provided high-speed and efficient running system for flexible production processes at affordable prices. IOT is the future of Automation.



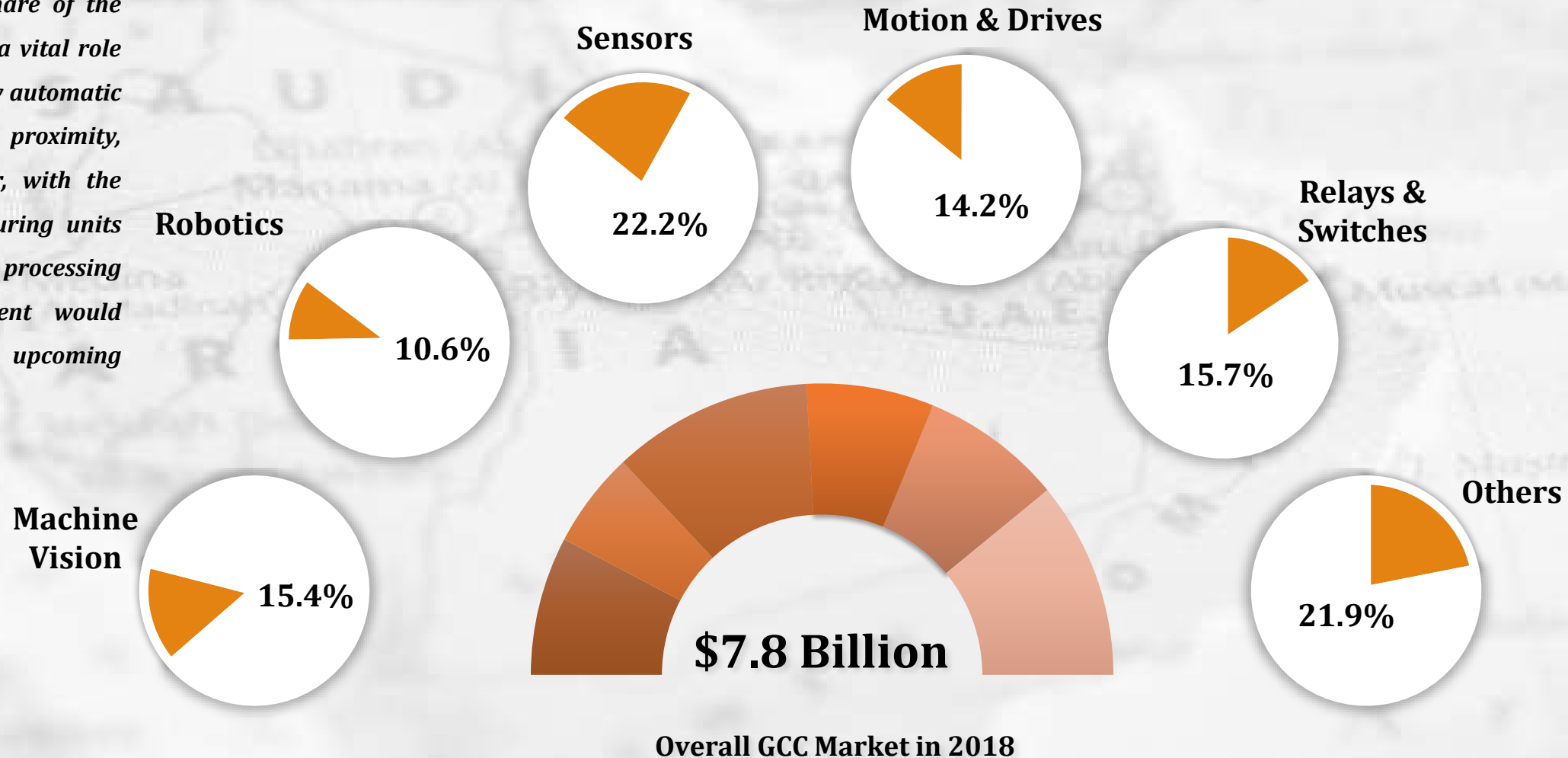
Others Include : PLM, PAM, MES, Industrial IOT

Overall GCC Market in 2018

Source: 6Wresearch

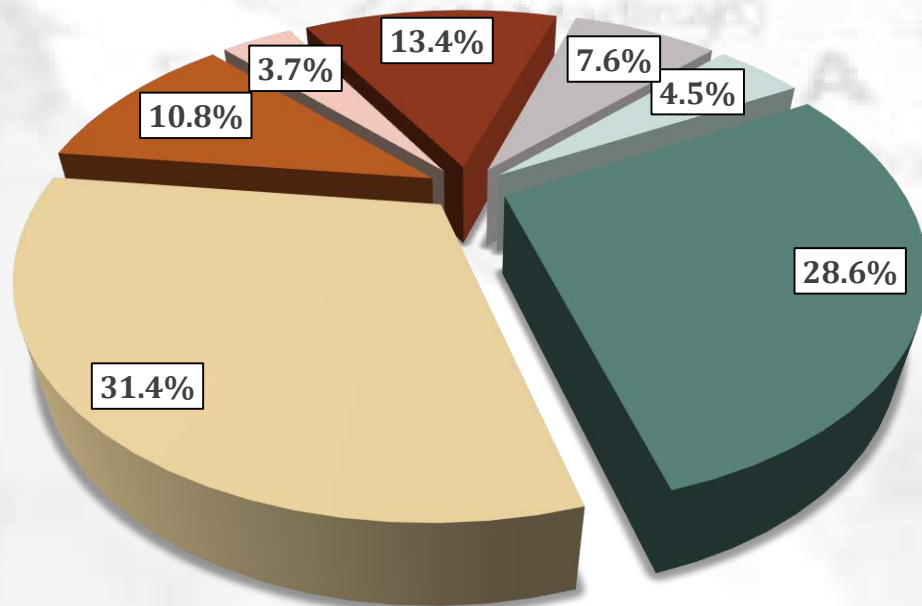
GCC Industrial Automation Market Overview, By Products

In the product/component segment, sensors account for highest share of the market revenues. Sensors play a vital role to make the product remarkably automatic and are used for measuring proximity, position, pressure etc. Further, with the construction of new manufacturing units across the chemical and food processing verticals, the robotics segment would witness modest growth in the upcoming years.



Source: 6Wresearch

GCC Industrial Automation Market Overview, By Verticals



Oil & Gas, power utility and water treatment industries accounts for key revenue share in the GCC region. Saudi Arabia and UAE are the leading oil producing hubs and are the major oil exporter globally, while Qatar endowed with major hydrocarbon reserves, is one of the world's top LNG exporters. As per Saudi vision 2030, Dubai Industrial Strategy 2030, Qatar National Vision 2030, the respective government plans to diversify the economy in the non oil sector, and is spending heavily to deploy renewable energy sources by investing in solar and wind power plants. Also, the government plans to launch major water and wastewater projects in the region and has introduced tenders for the same to multiple domestic and foreign firms. Hence, these verticals would continue to witness growth and would propel the demand for industrial automation market.

Source: 6Wresearch

GCC Industrial Automation Market Drivers

Industry 4.0

Industry 4.0 continues at pace, in which end-to-end manufacturing value chains are becoming seamlessly connected, underpinned by digitization, technical advances in big data and data analytics, Internet of Things (IoT), robotics, artificial intelligence and driven by the exponential growth of computational power and available information. The world is moving towards more on-demand processes, enabled by technologies such as additive manufacturing and real time big data processing. Hence, the industrial revolution 4.0 would propel the demand for industrial automation system in the industrial sector.



GCC Industrial Automation Market Drivers

Dubai Industrial Strategy 2030

The Industrial Strategy 2030 aims to focus on sustainable and innovation in business.

The aim is to make Dubai a manufacturing platform for global businesses and increase the total output and value addition of the manufacturing sector. The priority

6 sub sectors in this vision are:

- **Aviation**
- **Ships**
- **Pharmaceuticals and Medical Equipment**
- **Aluminum & Fabricated Metals**
- **Food and Beverages**
- **Machinery and Equipment**

The initiatives taken by the government to strengthen the manufacturing sector would directly impact the growth of industrial automation market, as all manufacturing facilities deploy automation components that include machine vision, robotics, sensors etc.

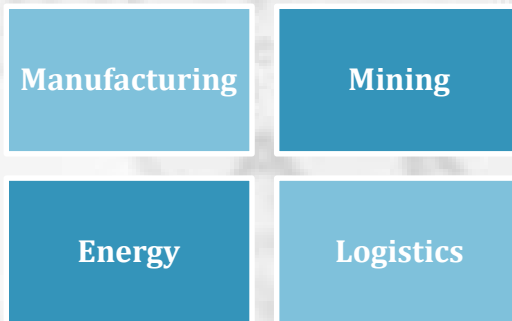


Source: 6Wresearch

GCC Industrial Automation Market Drivers

National Industrial Development and Logistics Program (NIDLDP)

The Ministry of Energy, Industry and Mineral Resources (MEIM) unveiled the NIDLDP in Saudi Arabia, which is one of the largest vision programs in terms of scale and ambition. The program seeks to attract \$427 billion in investments into the Kingdom by 2030. Four main sectors include:



NIDLDP would stand as the main driver for the growth of non-oil manufacturing sectors for many years.

The NIDLDP outlines more than 300 initiatives which are expected to contribute SR1.2 trillion to GDP by 2030 by raising the combined share of the above four sectors to 33 percent in 2030.



Automotive



Military



Pharmaceutical



Food & Beverage



Medical
appliances



Aquaculture

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