This study provides an in-depth analysis of the programmable logic controller (PLC) and PLC-based programmable automation controller (PAC) business in India. The study identifies growth segments and market trends, as well as challenges that PLC and PLC-based PAC suppliers face in India.

PLC and PLC-based PACs are the most widely used controllers in the discrete manufacturing industries. In process manufacturing, PLCs are widely used for subsidiary activities and, at the upper end, PACs are beginning to increase their penetration for process control.

The PLC and PLC-based PAC market for India grew in 2017 as compared with 2016. Looking at market share developments over the last years, ARC has noticed that the right industry positioning has become key to success.

This was proven again in 2017, when companies with a strong footprint in the machinery, automotive, food & beverage, and electric power generation market outgrew others.

Overall, technical trends are typically overpowered in the short term by business cycle dynamics, but PLCs are becoming smaller and increasingly incorporate more functionality. Two examples are cloud connectivity based on OPC UA and the ability to run apps on PLCs like an edge device. One of the latest developments is that a number of suppliers have started to include artificial intelligence in their controllers. ARC expects this to have an increasing impact in the long run.

For more information, please contact your ARC Client Manager or visit us at www.arcweb.com/market-studies/.

In the PLC market, different issues apply to technology suppliers, OEMs, and end users. Machine builders have different priorities than users. PLC suppliers must closely collaborate with their clients to generate value and thereby defend their market position. This study addresses key questions, such as:

- How can suppliers increase their value proposition?
- Are different strategies required for new installations vs. retrofit?
- What are the relevant applications for Industrie 4.0, intelligent devices, and the Internet of Things?
- Where are new market opportunities?
- What are the major trends driving the PLC business in India?

This research is available as a comprehensive Market Outlook Study (PDF).