

# Industrial Communications Report - 2020

## **Part of the Industrial IoT, Software and Communications Service Area Package**

Global insight and analysis of industrial communications trends that enables informed decision making for industrial automation vendors, and end-users.

“ Whether it is Fieldbus, Ethernet or Wireless, this report has everything you need to know about industrial connectivity. It also answers key questions about the uptake of nascent technologies such as TSN, SPE/APL and 5G. ”

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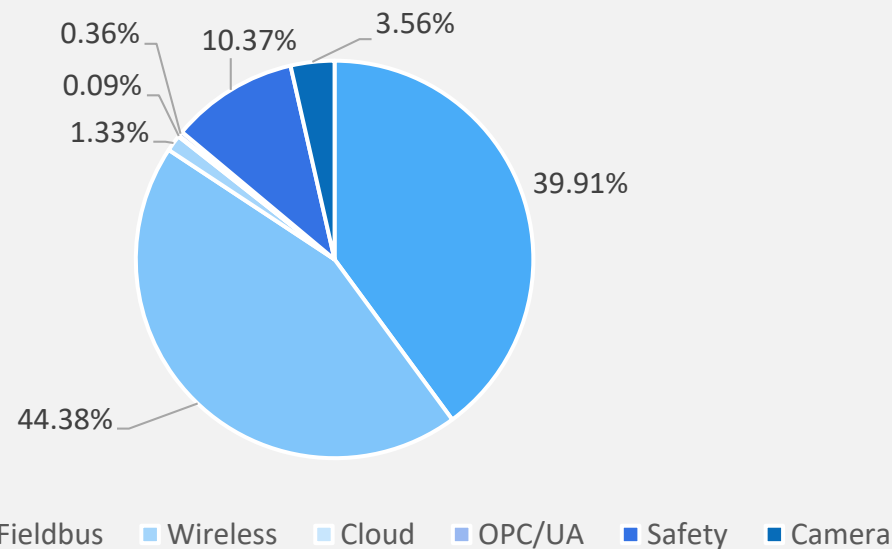
## HOW OMDIA HELPS YOU

- The impact of connectivity technologies, such as 5G, TSN and SPE on industrial automation
- End-equipment connectivity (motors, pumps and compressors, generators and turbines)

## KEY QUESTIONS ADDRESSED

- What are the size, share, and forecasts for new nodes by different technologies in the manufacturing space?
- What is the uptake of wired vs wireless technology?
- How is the connectivity landscape changing with the introduction of new technologies such as OPC UA, 5G, TSN and APL?
- What is the future of connectivity? New developments from various industrial associations?

The global market for industrial communications by networking technologies: 2018



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# Industrial Communications

## Industrial Communications Report

This report analyses the market for the industrial ethernet, fieldbus, wireless technologies, and cloud connectivity used within the industrial space. It is split into three product-based volumes as follows:

- Motors, controls, and controlled equipment
- Process control and instrumentation equipment
- Discrete control and visualization equipment

**Frequency:** Annual

\* Research coverage in next slide

# Industrial Communications: Research Coverage

## FREQUENCY: Annual

- 2019 base year
- 5-year annual forecast (2019 - 2024)

## MEASURES

- Unit shipments
- Market Share

## REGIONS

- North America
- South America
- EMEA
- APAC

## ETHERNET VARIANT

- Ethernet TCP/IP
- PROFINET
- EtherNet/IP
- Modbus TCP/IP
- POWERLINK
- EtherCAT
- Sercos III
- HSE
- CCLink IE
- CCLink IE TSN
- MECHATROLINK-III
- Hart IP
- EtherNet/IP G
- Other

## FIELDBUS VARIANT

- PROFIBUS
- CANopen
- DeviceNet
- ASI
- ControlNet
- HART
- FOUNDATION Fieldbus
- Firewire
- USB
- Sercos I & II
- CCLink
- MECHATROLINK-II
- Other

## PROCESS CONTROL AND INSTRUMENTATION

- DCS
- RTUs
- Process measurement devices
- Process controllers
- Process safety systems

## MOTOR, CONTROLS, AND CONTROLLED EQUIPMENT

- Servo drives
- Safety drives
- MV motor drives
- Stepper drives
- LV motor drives
- Motion controllers
- Motors
- Pumps and compressors
- Generators and turbines
- Switchgear

## DISCRETE CONTROL AND VISUALIZATION EQUIPMENT

- Remote I/O
- IPCs
- Sensors
- PLCs
- Machine vision
- Operator terminals
- Discrete machine safety components

## WIRELESS TECHNOLOGIES

- WiFi (802.11)
- Zigbee
- Bluetooth
- Bluetooth low energy
- WirelessHART
- ISA 100.11a
- Cellular
- Other

## SAFETY NETWORK VARIANT

- CIP Safety (via Ethernet/IP)
- CIP Safety (via DeviceNet)
- PROFISAFE (via PROFINET)
- PROFISAFE (via PROFIBUS)
- OpenSAFETY
- ASI Safety

## CLOUD CONNECTIVITY

- OPC UA
- MQTT
- AMQP

# Related Content: Industrial IoT, Software and Communications Service Area Coverage



## Service Area Package: Industrial IoT, Software and Communications

Industrial IoT  
Intelligence Service

Industrial Edge Networking Components –  
Annual Intelligence Service

Industrial Software  
Intelligence Service

Industrial Communications - Annual  
Intelligence Service

Digital Innovation in Manufacturing End-  
User Survey

Industrial IoT Readiness  
End-User Survey

### Transactional reports

- Discrete Industrial Sensors
- 5G in Manufacturing
- Manufacturing Edge Compute and the future of Automation

## About Omdia's

### Industrial IoT, Software and Communications Research

With a background as a market leader in industrial automation and machinery, Omdia's Industrial IoT, communications and software research provides a unique insight into the market potential, opportunities and challenges in the digital transformation of the industrial/manufacturing sector.

The research portfolio spans industrial connectivity (including 5G an TSN), industrial software (MES, APM, Digital Twin), Analytics (including Edge compute and Artificial Intelligence), and Industrial Cybersecurity. A robust primary research methodology supports quantitative analysis of these markets, alongside discussion of forecast scenarios, the competitive environment, technology trends as well as ongoing coverage of market developments. This is combined with comprehensive "voice of the customer" analysis, highlighting customer challenges, objectives and maturity levels in deployment of new solutions and business models.

This insight is used to support vendors understanding of new business opportunities, prioritizing markets and investment, as well as guiding end-users in understanding best practices for digital transformation

# Our “Ask an Analyst” Service Provides Best in Class Customer Support

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### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.