

# Total Available Market for IIoT Endpoint Devices

FIVE-YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2022

## HOW MANY IA ENDPOINT DEVICES ARE AVAILABLE FOR THE IIOT?

Industrial automation (IA) represents one of the largest potential growth segments within the Internet of Things (IoT). IoT's potential within industrial automation is due not only to the large number of devices shipped annually, but also the significant potential for retrofit of installed devices.

Industrial Internet of Things (IIoT) endpoint devices that reside below the network infrastructure tier in discrete, process, and substation automation are primary data sources for cloud-based IIoT applications. At the same time, IP-based industrial endpoint devices represent some of the strongest potential within the typically slow growing industrial automation marketplace.

IIoT-driven strategies are not the only catalyst behind anticipated growth. Manufacturers continue to incorporate IP-based connectivity due to significant value propositions in areas such as horizontal and vertical integration, IT/OT convergence, and overall price/performance benefit.

This analysis answers the important question of how many endpoint devices are and will be available for incorporation into the IIoT by virtue of their IP connectivity.

For more information about this research, please contact your ARC Client Manager or visit us at [www.arcweb.com/market-studies/](http://www.arcweb.com/market-studies/).

## STRATEGIC ISSUES

Today's industrial internet-driven initiatives rely on endpoint devices for data acquisition, remote access, and execution of process, machine, and/or asset performance improvement strategies:

- How large is the total available market (TAM) for IIoT endpoints, and how does the potential vary by shipments versus retrofits?
- What is the total available market for discrete versus process and substation automation by device type?
- What strategies should potential IIoT adopters and product suppliers pursue?

## RESEARCH FORMATS

This ARC research is available as a concise, executive-level Market Analysis Report (PDF), with detailed charts.

## RESEARCH FOCUS AREAS

### STRATEGIC ANALYSIS

- Major Trends
- Industry Trends
- Strategies for Buyers vs. Suppliers
- Scope of Research

### MARKET FORECASTS

- Total Available Market (TAM) for IIoT Endpoint Devices (\$s, Units)
- TAM for IIoT Endpoint Devices in Discrete Automation by Device Type (\$s, Units)
  - 3D Laser Scanners
  - AC Drives
  - Additive Manufacturing Systems
  - Autonomous Mobile Robots
  - CNCs
  - Discrete I/O
  - GMCs
  - Industrial PCs
  - Industrial UPS
  - IP Cameras
  - Machine Vision Cameras
  - Machine Vision Sensors
  - Machine Vision Systems
  - Operator Interface Panels
  - PLCs
  - Safety PLCs
  - Servo/Stepper Drives
  - Wind Turbine Control Systems
  - Other

- TAM for IIoT Endpoint Devices in Process Automation by Device Type (\$s, Units)
  - DCS Systems
  - Digital Control Valve Positioners
  - Electronic Flowmeters
  - Intelligent Electric Actuators
  - Intelligent Pumps
  - Process I/O
  - Process Safety Systems
  - SCADA RTUs
  - Single and Multiloop Controllers
  - Smart Toxic Gas Detectors
  - Smart Transmitters
  - Other

- TAM for IIoT Endpoint Devices in Substation Automation by Device Type (\$s, Units)
  - Controllers
  - Gateways
  - IEDs
  - RTUs
  - Servers
  - Transformer Monitoring
- TAM by Shipments vs. Retrofits by Sector
- Shipments of IIoT Endpoint Devices in Discrete, Process, and Substation Automation by Device Type (\$s, Units, ASP)

Total Available Market for IIoT Endpoint Devices

