COMPRESSOR CONTROL SYSTEM MARKET

By Controlling Component (PLC and SCADA), Application (Oil & Gas, Refining, Petrochemical, Power Generation, Metal & Mining, and Fertilizer), & Geography

ANALYSIS & FORECAST TO 2020
MarketsandMarkets is a global market research and consulting company based in the U.S. We publish strategically analyzed market research reports and serve as a business intelligence partner to Fortune 500 companies across the world. MarketsandMarkets also provides multi-client reports, company profiles, databases, and custom research services.

MarketsandMarkets covers fourteen industry verticals, including aerospace and defence, advanced materials, automotives and transportation, biotechnology, chemicals, consumer goods, energy and power, food and beverages, industrial automation, medical devices, pharmaceuticals, semiconductor and electronics, and telecommunications and IT.

Copyright © 2015 MarketsandMarkets
All Rights Reserved. This document contains highly confidential information and is the sole property of MarketsandMarkets. No part of it may be circulated, copied, quoted, or otherwise reproduced without the approval of MarketsandMarkets.
INTRODUCTION

1.1 STUDY OBJECTIVES

- To define, classify, and quantify the compressor control system market, focusing on the major applications
- To analyze the global market for the compressor control system with an emphasis on the high-growth areas, such as technological solutions, market verticals, and the components market
- To analyze the greenfield and brownfield opportunities as well as the market life cycle analysis along with technologies and market roadmaps
- To study the evolution and timeline of the compressor control systems and their respective markets
- To provide the market statistics with detailed classifications by market size
- To analyze the global compressor control system market with a special focus on the high-growth applications in each vertical
- To strategically analyze the micromarkets\(^1\) with respect to the individual growth trends, future prospects, and contribution to the total market
- To analyze the opportunities in the market for stakeholders and details of the competitive landscape for the market leaders
- To forecast the market size of the segments in terms of value with respect to the four main geographies, namely the Americas, Europe, Asia-Pacific, and RoW (Rest of the World)
- To strategically profile the key players and comprehensively analyze their market shares and core competencies\(^2\)
- To provide the impact analysis of the market dynamics on the factors that currently drive and restrain the growth of the market, along with their impact in the short-, medium-, and long-term landscapes
- To study the complete value chain, allied industry segments, and perform a value chain analysis of the global compressor control system landscape
- To provide the detailed Porter's analysis; market life cycle analysis along with the technologies and market roadmaps, evolution, and timelines of each type of organic electronics; and their respective markets
- To track and analyze the competitive developments such as joint ventures, mergers & acquisitions, new product developments, and research & developments in the compressor control system market
- To track the competitive intelligence from the company profiles, key player strategies, and game-changing developments

---

1. Micromarkets are defined as the further segments and sub-segments of the compressor control system market included in the report.
2. Core competencies of the companies are captured in terms of their key developments, SWOT analysis, and key strategies adopted by them to sustain their position in the market.
1.2 MARKET DEFINITION

- The report is based on the extensive research study of the compressor control market. Moreover, the main aim of this report is to identify and cover the entire ecosystem of the compressor control system and all its sub-segments.
- A complete competitive landscape of the current market is analyzed by the market share analysis and rankings of the current key players, and all the other details of the key players are discussed in their company profiles section.

1.3 STUDY SCOPE

1.3.1 MARKETS COVERED

This research report categorizes the compressor control system market into the following segments:

**Compressor control system market, by controlling component**
- Programmable Logic Controller (PLC)
- Supervisory control and data acquisition (SCADA)
- Other components (transmitters, valves, actuators, drives, and motors)

**Compressor control system market, by application**
- Oil & Gas
  - LNG
  - PNG - LNG
  - Shale Gas
  - Others (city gas distribution and long distance gas & oil pipelines)
- Refining
  - Hydrocracking
  - Hydrotreating
  - Fluid Catalytic Cracking (FCCU)
  - Continuous Catalytic Reforming (CCR)
  - Steam Methane Reforming (SMR)
- Petrochemical
  - Ethylene
  - Methanol
  - Nitrogen plants
- Power Generation
  - Gas-based
  - Combined Cycle Power Plant (CCPP)
  - Coal gasification
  - Biofuel
  - Others (integrated gasification combined cycle (IGCC) and flexible combined cycle)
- Metals & Mining
  - Utility
  - Oxygen/Nitrogen
  - Boil-off gas
  - Synthesis gas
  - Others (steel & metal manufacturing industries)
- Fertilizer
  - Ammonia
  - Urea
- Others (automotive & cement)

**Compressor control system market, by geography**

- Americas
  - North America
    - U.S.
    - Canada
    - Mexico
  - South America
- Europe
  - U.K.
  - Germany
  - France
  - Italy
  - Spain
  - Rest of Europe
APAC
- India
- China
- Japan
- Rest of APAC

RoW
- Middle East
- Africa

1.3.2 YEARS CONSIDERED FOR THE STUDY
- Historical year: 2012
- Base year: 2013
- Forecast years: 2014 to 2020
- The base year considered for the company profiles: 2013 (Cases wherein the information for the base year was not available, the prior year has been considered).

1.4 CURRENCY & PRICING
The currency used in the report is the U.S. dollars, with market size indicated only in $BILLION.
- For companies that reported their revenue in the U.S. dollars, the revenue has been picked up from their annual report.
- For companies that reported their revenue in other currencies, the average annual currency conversion rate has been used for the particular year to convert the value into the U.S. dollars.

1.5 LIMITATIONS
- The scope of this report does not take into account the software and aftermarket services that are provided to the end-users.
- The scope of this market is limited only to the compressor controlling components, applications, and geography.
- The scope of this report is restricted particularly to the market in terms of the major components and applications that are either already commercialized or are expected to be commercialized by 2020.
1.6 STAKEHOLDERS

- Original technology designers and suppliers
- Raw material suppliers
- Cable and wire harness manufacturers
- Connectors and cable assembly manufacturers
- Integrated device manufacturers (IDMs)
- Original device manufacturers (ODMs) (discrete and chip manufacturers)
- Compressor original equipment manufacturers (OEMs) (mid-sized compressors)
- Process OEMs
- System integrators
- Electronic hardware equipment manufacturers
- Assembly and packaging vendors
- Technical universities
- Government space research agencies and private research organizations
- Various categories of software suppliers
- Research institutes and organizations
- Market research and consulting firms
EXECUTIVE SUMMARY

The compressor control system has become a central component in many core industrial processes of industries, such as oil & gas and petrochemical industries. In these processes, the profitability is dependent on the efficiency and functionality of the compressor controls. Due to the dynamic simulation of various software and hardware tools in the compressor control system, the performance of industrial processes is easily evaluated. The compressor control solutions are assembled with the integrated programmable logic controller (PLC) and supervisory control and data acquisition (SCADA) & human machine interface (HMI) systems to monitor various process controls.

Owing to the number of technological advancements, engineering excellence, and diverse industrial requirements, a variety of compressors and controllers have been developed. Companies which are into this business undertake continuous R&D to manufacture improved compressor control products.

The compressor control system is extensively used in most of the core industries, such as oil & gas, refining, petrochemical, power generation, metals & mining, fertilizer, and so on. This is one of the prime drivers, due to which the market is emerging globally. The increased extraction of natural gas resources from the shale gas basins would majorly impact the compressor control business and create many opportunities for the market.

Some of the major companies which are dominating the compressor control system market are Siemens AG (Germany), GE Oil & Gas (U.S.), Emerson Electric Co. (U.S.), Dresser-Rand (U.S.), Rockwell Automation, Inc. (U.S.), Compressor Controls Corp. (U.S.), Honeywell International, Inc. (U.S.), Schneider Ltd. (U.K.), Atlas Copco (Sweden), and so on. These players have adopted various growth strategies to expand their global presence and increase their market shares. The strategies adopted by the companies, such as new product launches, partnerships, contracts, collaborations, acquisitions, and expansions, are helping to achieve growth in the compressor control system market.
The global market size for the controlling components in the compressor control system market is expected to grow from $XX billion in 2013 to $XX billion by 2020, at a CAGR of XX% between 2014 and 2020. The PLC component held the major market size in 2013; it is expected to dominate the market in the coming years as well. It was valued at $XX billion in 2013 and is expected to reach $XX billion by 2020, at an estimated CAGR of XX% between 2014 and 2020.
The oil & gas industry has made the highest contribution in the compressor control system market in 2014.

*Note: Others include the automotive and cement industry.

Source: Expert Interviews, Company Press Releases, Investor Presentations, Journals, and MarketsandMarkets Analysis

The above figure depicts the market size of the compressor control system market, by applications. Among all applications, the oil & gas, refining, and petrochemical applications show larger market shares of XX%, XX%, and XX% respectively. The applications’ distribution gives a better idea about the major applications that are driving the growth of this compressor control system market. The growth rate of oil & gas application is the highest among all the applications in the compressor control system market.
The fertilizer industry is estimated to grow at the highest CAGR of XX\% between 2014 and 2020, followed by the metals & mining and power generation applications.

The demand for the global food supply has always been recognized, and the recent developments have made the benefits of fertilizers more clear. The ammonia market is the largest fertilizers industry due to the fact that the production of nitrogen compounds is based on ammonia, which has become one of the most widely manufactured chemicals in the world that fuels the growth of the entire fertilizer applications in controlling the ecosystem.
The Americas holds the largest market share in the compressor control system market in 2014.

Source: Expert Interviews, Company Press Releases, Investor Presentations, Journals, and MarketsandMarkets Analysis

Note: CAGR is calculated between 2014 and 2020, market size

The Americas is a developed region and accounts for XX% of the global compressor control market share. The American market growth is majorly driven by the U.S. that holds more than XX% of the compressor control market in North America. The extraction of shale gas, and the increasing demand for petrochemicals are driving the market of the U.S. Canada, on the other hand, is showing a steady growth along with Mexico. APAC is estimated to hold the highest CAGR of XX% between 2014 and 2020. Industrial processes in refining, including hydrocracking and hydrotreating, require components such as valves, actuators, and so on, which are highly manufactured in APAC due to the low labor cost and high return on investments. These factors are fueling the growth of the compressor control system market in the APAC region.
Disclaimer: MarketsandMarkets strategic analysis services are limited publications containing valuable market information provided to a select group of customers in response to orders. Our customers acknowledge, when ordering, that MarketsandMarkets strategic analysis services are for our customers’ internal use and not for general publication or disclosure to third parties. Quantitative market information is based primarily on interviews and therefore, is subject to fluctuation.

MarketsandMarkets does not endorse any vendor, product or service depicted in its research publications. MarketsandMarkets strategic analysis publications consist of the opinions of MarketsandMarkets’ research and should not be construed as statements of fact. MarketsandMarkets disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

MarketsandMarkets takes no responsibility for any incorrect information supplied to us by manufacturers or users.

All trademarks, copyrights and other forms of intellectual property belong to their respective owners and may be protected by copyright. Under no circumstance may any of these be reproduced in any form without the prior written agreement of their owner.

No part of this strategic analysis service may be given, lent, resold or disclosed to non-customers without written permission.

Reproduction and/or transmission in any form and by any means including photocopying, mechanical, electronic, recording or otherwise, without the permission of the publisher is prohibited.