

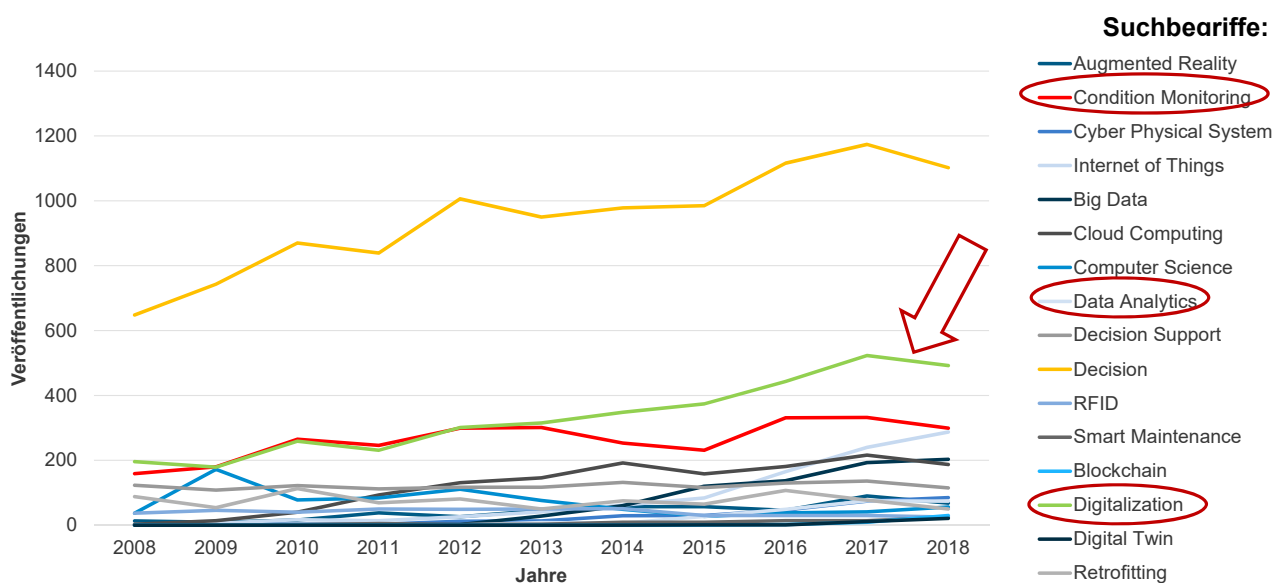
Digitalisierte Instandhaltung

Stand und Perspektiven – 33. ÖVIA Kongress

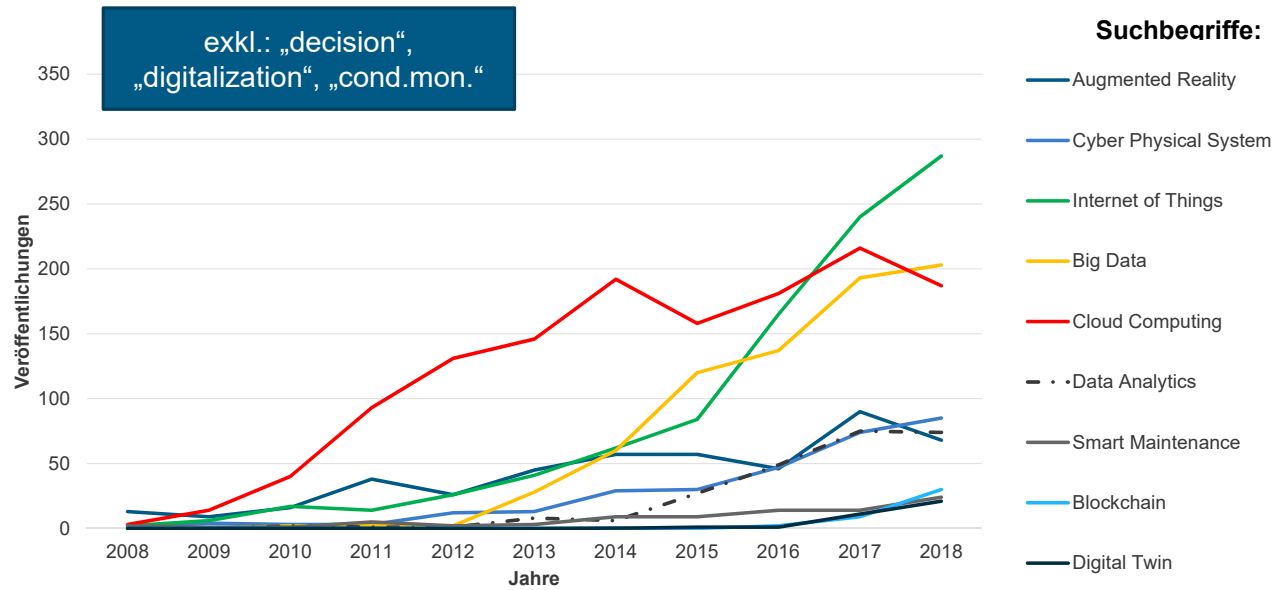
Eröffnung – Einleitung

Leoben, 09.&10.10.2019

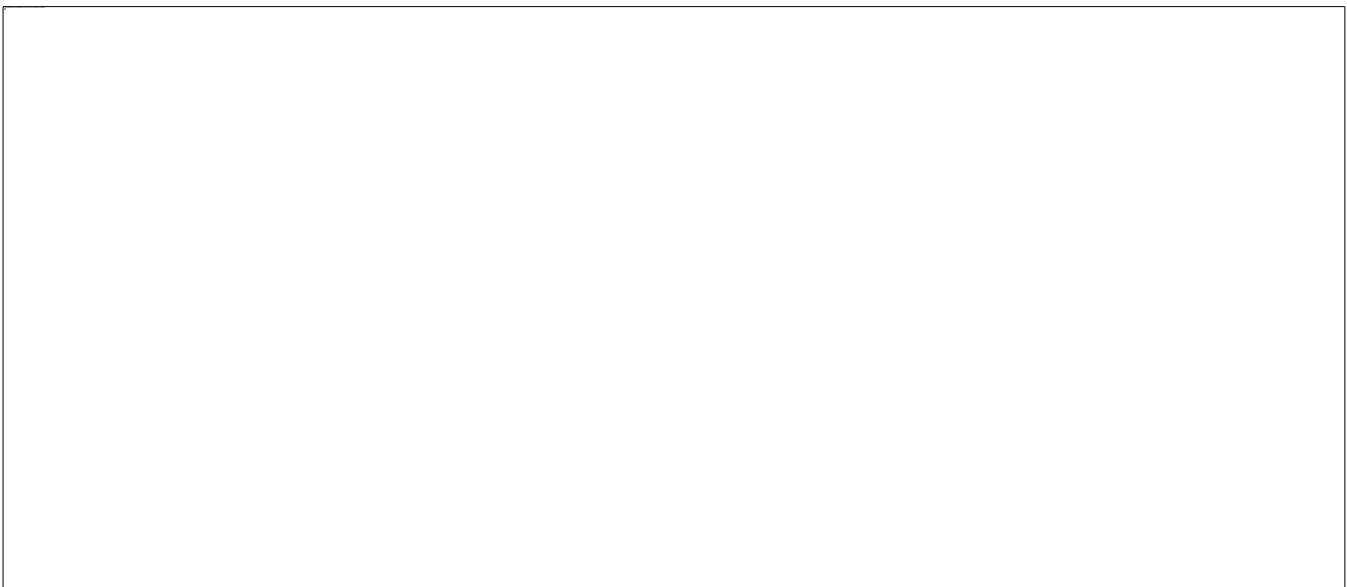
Industrie 4.0 – Literaturrecherche Scopus



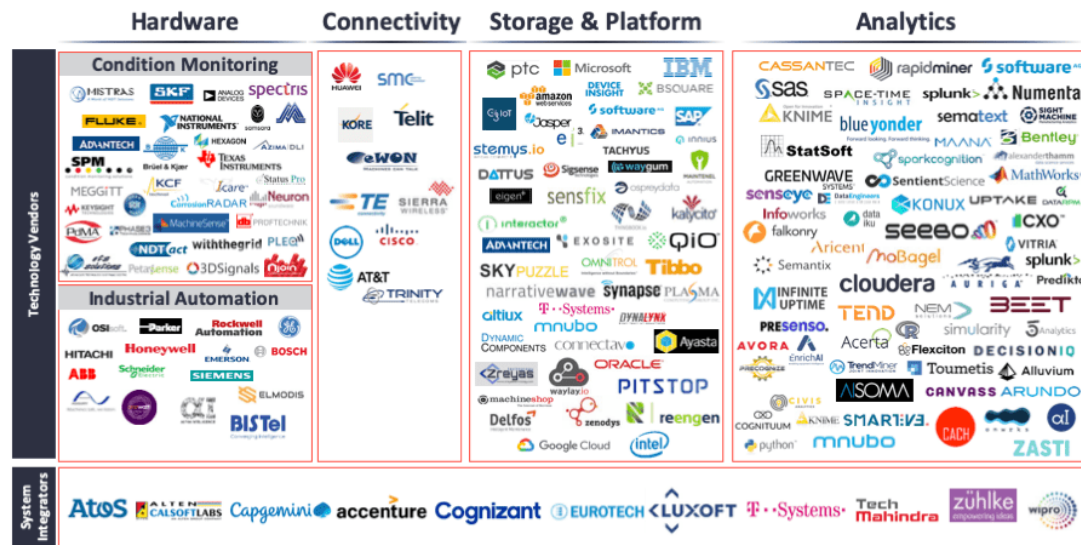
Quantitative Analyse: Industrie 4.0 – Aufwärtstrend



Relevante Keywords „maintenance“ 2018 – Detail



180+ Companies operating in Predictive Maintenance Market



Note: Companies are categorized according to their main field of activity, e.g., Industrial Automation; Only companies considered that have a notable use case on PdM; Companies are not mentioned more than once; PdM solutions may also make use of other providers not mentioned here Startups often cover more than just one field and are therefore roughly allocated. Source: IoT Analytics Research

Predictive Maintenance – Market Report 2019-2024

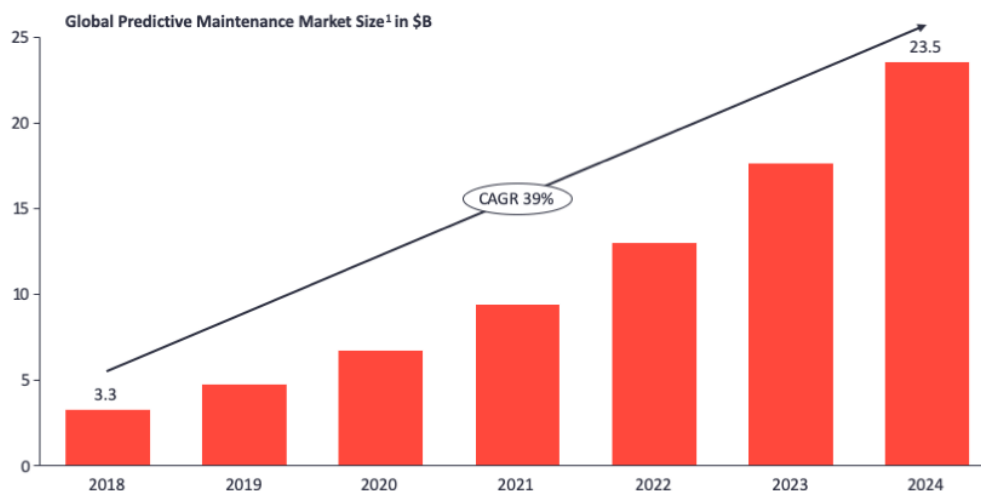
IoT ANALYTICS

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Global Predictive Maintenance Market

Predictive Maintenance a \$3.3B Market in 2018, Expected to Grow to \$23.5B by 2024

Global Predictive Maintenance Market Development



1. Market Size defined as entire "Annual Predictive Maintenance technology-spend" by companies implementing Predictive Maintenance solutions in USD

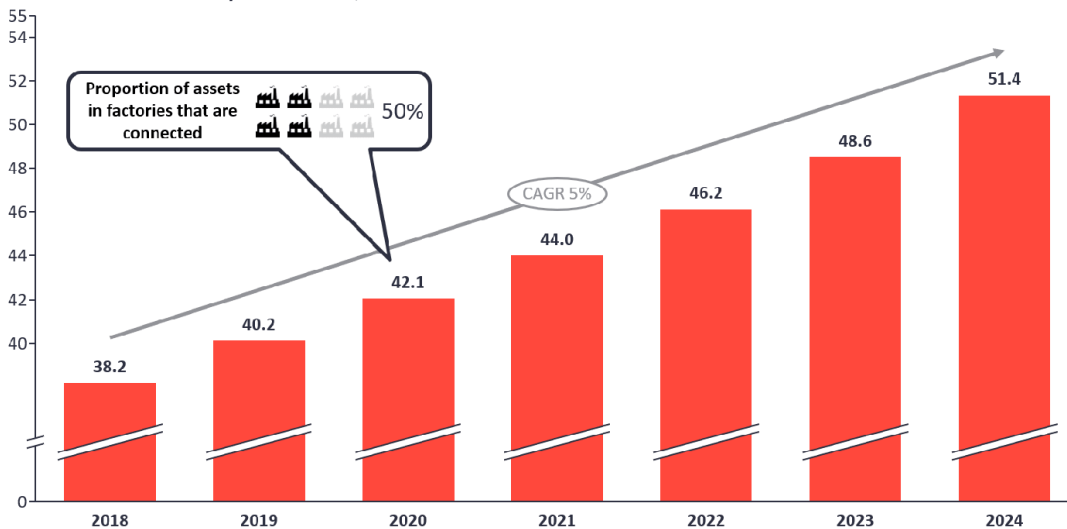
Source: IoT Analytics 2019: Predictive Maintenance Market Report 2019-2024

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Global Industrial Connectivity Market Size 2018-2024

Hardware, Software, Services, Solutions

Global Industrial Connectivity Market Size in \$B



Note: The overall industrial connectivity market includes hardware (controllers, remote I/O and gateways), software, services and solutions. Proportion of assets in factories that are connected refers to the proportion of connectable assets (i.e. machinery / systems that have controllers) that are connected to either on-premise or remote data collection systems versus those that are not networked / connected.

Source: IoT Analytics – August 2019

Will the small fish eat the big ones?

Software may enable small and medium-sized industrial automation vendors to challenge large incumbents



= SME vendors = Enabling software = Large incumbents

Note: SME = small and medium-sized enterprises, e.g. firms with <2% market share in the industrial automation controllers market
Source: IoT Analytics – August 2019

Predictive Maintenance Company Ranking

Scores

Company	Overall Score ¹		Q ²	2016 ³	in ⁴
1 IBM	84.6%	USA	140	2600	338
2 SAP	61.3%	GER	260	1120	138
3 SIEMENS	42.1%	GER	50	1480	169
4 Microsoft	35.3%	USA	30	1760	90
5 GE	27.8%	USA	50	976	90
6 Intel	24.7%	USA	0	1510	54
7 BOSCH	23.2%	GER	40	1060	45
8 SKF	20.9%	SWE	0	75	202
9 CISCO	20.3%	USA	0	1430	20
10 ABB	17.5%	SWI	20	276	116
11 Schneider electric	11.9%	FRA	10	186	83
12 accenture	11.2%	IRL	10	185	77
13 Honeywell	9.8%	USA	0	388	49
14 SAS	7.9%	USA	30	110	27
15	7.0%		0	461	11
16 Rockwell Automation	7.0%	USA	0	204	44
17 EMERSON	4.4%	USA	0	192	20
18 HUAWEI	4.4%	CHN	0	212	17
19 ptc	4.3%	USA	0	256	10
20 Parker	3.8%	USA	0	177	16

1. The highest ranking company in each aspect receives a rating of 100%, with all other receiving a lower percentage in linear relation to the actual frequency. The overall result is the average of all three categories 2. Monthly searches on Google in conjunction with "Predictive Maintenance". 3. 2016 newspaper and blog mentions in conjunction with "Predictive Maintenance" 4. Number of employees that carry the tag "Predictive Maintenance" on LinkedIn in January 2017. Sources: Google, LinkedIn, Company websites, IoT Analytics