

# Process Safety Systems Market Research

FIVE-YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2022

## PROCESS SAFETY SYSTEMS SUPPLIERS ADOPT NEW TECHNOLOGIES

Process safety system hardware includes all controllers, workstations, and safety I/O. Bundled software includes control and programming software and may also include human-machine interface (HMI). Control software is typically embedded in the controllers and performs monitoring, control, and shutdown functions. HMI software typically resides in safety instrumented system (SIS) workstations, which are mostly PCs. PCs used for system configuration are also included in the segment. This segment does not include field devices, such as transmitters and sensors.

Recognizing that many previous process safety systems projects have failed, suppliers are adopting new technologies and standards to improve process safety systems project execution. Some of the key technological changes occurring in the

market include a growing use of new I/O technologies, increasing adoption of standards, and increasing use of virtualization. The overarching goal of these changes is to make process safety systems easier to implement and maintain.

There has been significant technical progress in system virtualization, a critical technology that underlies and enables the cloud computing services that are taken for granted. New technologies being developed could potentially virtualize many of the applications now running in programmable logic controllers (PLCs) or even in redundant distributed control systems (DCSs).

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## STRATEGIC ISSUES

Both automation suppliers and end users strive to get more value from their process safety systems. Some key strategic issues covered in the report include:

- Embrace new technologies and work processes to reduce cost and complexity
- Get system and subcomponents cyber-security certified
- Integrate security with safety
- Develop robust migration solutions that reduce the recertification effort
- Develop packaged SIS solutions

## RESEARCH FORMATS

This ARC research is available in the form of a Market Intelligence Workbook (Excel) and/or a concise, executive-level Market Analysis Report (PDF), with or without detailed charts.

## RESEARCH FOCUS AREAS

### STRATEGIC ANALYSIS

- Major Trends
- Regional Trends
- Industry Trends
- Strategic Recommendations

### COMPETITIVE ANALYSIS

- Market Shares of the Leading Suppliers
- Market Shares by Region
  - North America
  - Europe, Middle East, Africa
  - Asia
  - Latin America

### Market Shares by Revenue Category

- Hardware
- Software
- Services

### Market Shares by Service Type

### Market Shares by Safety Integrity Level

- SIL-2
- SIL-3

### Market Shares by Industry

- Chemical
- Electric Power Generation
- Oil & Gas
- Pharmaceutical & Biotech
- Refining

### Market Shares by Application

- Burner Management
- Critical Process Control
- Emergency Shutdown
- Fire & Gas Monitoring
- Turbo Machinery Control

### Market Shares by Project Type

### Market Shares by Sales Channel

### MARKET FORECASTS & HISTORIES

- Total Process Safety Systems Business
- Shipments by Region

### Shipments by Revenue Category

- Shipments by Service Type
- Shipments by Safety Integrity Level
- Shipments by Industry
- Shipments by Application
- Shipments by Project Type
- Shipments by Sales Channel

### INDUSTRY PARTICIPANTS

The research identifies all relevant suppliers serving this market.

The Worldwide Process Safety Systems Market

