

HMI Software Worldwide Outlook

FIVE YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2008

NEED FOR REAL-TIME PRODUCTION INFORMATION DRIVES GROWTH

Manufacturers want to access and aggregate real-time production process information to drive factory visibility and intelligence. Human Machine Interface (HMI) Software utilizing flexible, multi-functional, interoperable platforms that provide peer-to-peer interfaces with other platforms is driving factory visibility and intelligence as well as playing a major role in providing plant-wide connectivity. That is why HMI Software is sometimes referred to as Visualization Software. HMI Software connectivity on the plant floor allows a view of devices and machinery while connectivity towards the enterprise allows HMI Software to view production management and manufacturing intelligence tiers required by manufacturers.

New technologies and form factors are driving HMI Software growth. Regulatory requirements such as 21CFR Part 11 and the TREAD act demand the electronic tracking and tracing capabilities available with HMI Software. HMI and related control software applications remain an integral part for the access, presentation, and exchange of plant floor production processes and represent the application of cutting edge technologies while maintaining the established functionality that each vertical industry has come to depend on. This evolution will continue as HMI Software becomes a component of current Web-based architectures and as Web-services emerge to become the next delivery system for presentation and control processes.

STRATEGIC ISSUES

Due to the strategic role played by HMI Software, manufacturers are looking to HMI Software systems as the tool for plant-wide information collection and integration. HMI Software has flourished on the establishment of de facto standards that have been adopted across both suppliers and users domains. These standards would include the ubiquitous Windows platform, component technologies (ActiveX/OPC), network connectivity (Ethernet and common device networks), and now Internet-based technology standards such as XML/SOAP. Windows CE.NET 4.2, Terminal Services, Wireless HMI Devices, Scalable Vector Graphics, and OPC DX and XML-DA connectivity are technologies that are widely available.

STUDY CONTENTS

EXECUTIVE SUMMARY

Market Overview
Strategies for Success

SCOPE

MARKET SHARES LIST OF FIGURES

Market Shares of the Leading HMI Software Suppliers
Market Shares by Region
North America
EMEA
Asia
Latin America

MARKET FORECAST LIST OF FIGURES

Total HMI and Related Software Business Including Services
Shipments by Region
Shipments by Software vs. Services
Shipments by Industry
Aerospace
Automotive
Cement & Glass
Chemical
Electrical
Electronics and Semiconductor
Fabricated Metals
Food & Beverage
Machinery and Heavy Equipment
Metals and Mining
Oil and Gas
Pharmaceutical

Power
Pulp & Paper
Water & Wastewater
Other
Process vs. Discrete vs. Hybrid/Other

Shipments by Module

HMI
Supervisory
Control

Shipments by Operating System

Average Selling Price by Operating System

Shipments by Distribution Channel
Shipments by OEM, SI, and End User

Shipments of HMI and Related Software
Shipments of HMI Software Alone

SUPPLIER PROFILES

Profiles for over 23 of the major suppliers servicing this market are included. Each profile reviews the company's business, products, and services as it applies to this market segment.

The Worldwide HMI Software Market
(Millions of Dollars)

