

A photograph of an industrial factory interior. In the foreground, there are several long, parallel metal beams. In the background, a large red robotic arm is visible, with a bright blue light emanating from its end. The factory has a complex structure with multiple levels and various pipes and beams.

Industrial Automation In Spain

Market Research - January 2026

Now, for tomorrow



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Intro

- Sector Summary
- Size and growth
- Key drivers
- Key trends

Executive Summary

Market Expansion

\$1.18B → **\$1.62B**

Projected growth 2024–2032 with **CAGR 5.34%**

European Position

#3 Rank

In Europe for new robot installations (2024), surpassing France with **5,160 units**.

Growth Hotspots & Value Migration

Shift to Software-Led Value

Value is migrating from hardware-centric to software-led solutions (Industrial AI, Digital Twins, MES), driving higher margins.

Intralogistics Boom

Warehouse automation is the fastest growing segment (CAGR ~19.3%) driven by e-commerce and labor scarcity.

High-Growth Segments

Industrial AI (18.45% CAGR), Food & Beverage packaging (up to +34% in sub-segments), and high-compliance Pharma.

Structural Drivers & Ecosystem

Demographic Imperative

Projected loss of 2.6M workers by 2050 forces a shift from discretionary efficiency to mandatory automation.

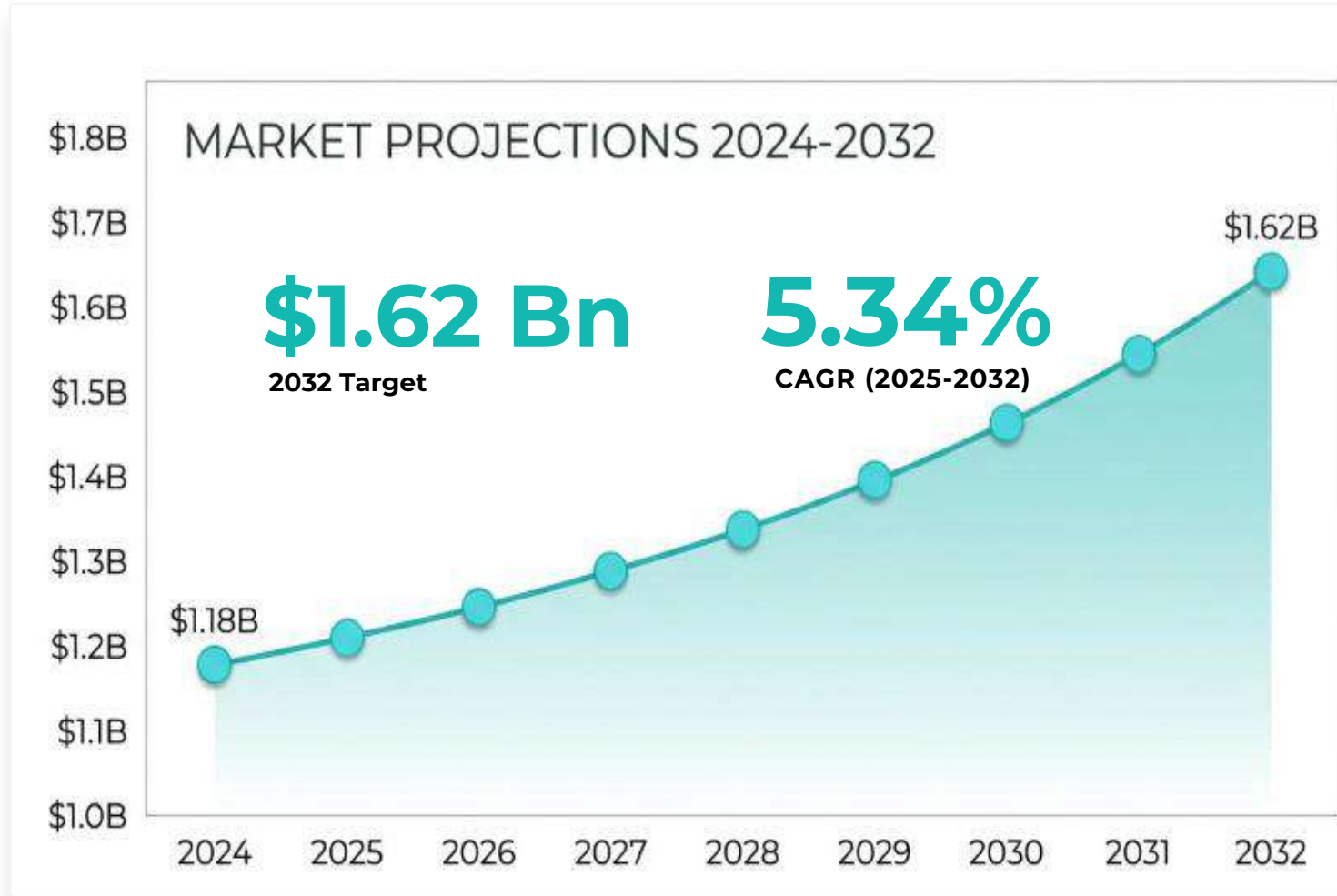
PERTE Funding Catalysts

Massive public injection: PERTE VEC (>€24B) for EV retooling & PERTE Chip (€12.25B) for semiconductor sovereignty.

Local Channel Dominance

~65 local System Integrators control the "last mile" of implementation. Trust, proximity, and regional support are key winning factors.

Market Growth Trajectory



High-Growth Challenger

Spain ranks as a top market in Europe, defying regional trends. Despite an 8% decline in EU installations in 2024, Spain installed **5,160 industrial robots**, moving into the top 3 and signaling robust mid-term demand across core industries.

Shift to Intelligence

Growth is pivoted toward **"Smart Manufacturing"** and **Industrial AI**. Fully-automated segments and Automated Storage and Retrieval Systems (ASRS) in F&B and logistics are supporting sustained double-digit growth in specialized niches.

Key Growth Drivers



Demographic Crisis

Spain is projected to lose **2.6M workers** by 2050.

Automation is no longer optional but a structural necessity to offset the widening skills gap and aging workforce.



PERTE Funding

Over **€77B** in EU funds mobilize modernization.

Specifically, PERTE VEC (€24.3B) and PERTE Chip (€12.25B) mandate advanced automation adoption for subsidies.



Wage Inflation

Rising labor costs and service-sector inflation drive capital substitution.

AI-driven solutions offer **20-30% efficiency gains** to maintain global competitiveness.



Nearshoring

Supply chain resilience is bringing production back to Europe.

Spain's plants must be **highly automated** to compete on cost with traditional low-wage regions.



Sustainability

Green automation is critical for ESG compliance.

Precision control systems reduce energy consumption and material waste, meeting strict **EU environmental mandates**.

Key Growth Trends



Collaborative Robotics

Rapid deployment in SMEs without safety cages. Ideal for **high-mix/low-volume production**, lowering the barrier to entry for automation.



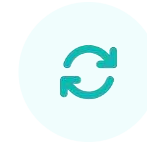
AI-Driven Maintenance

Shift to predictive diagnostics using **"Physical AI"** and Generative AI pilots. Boosts uptime and addresses critical skilled labor shortages.



Green Automation

Precision sensing and control to minimize energy and material waste. Essential for meeting EU **"Green Deal"** and ESG compliance mandates.



Servitization (XaaS)

Transition from CAPEX to OPEX via **"Robotics-as-a-Service"**. Enhances financial agility and scalability for mid-market factories.



Edge & Private 5G

Low-latency local processing. Enables **real-time control** of mobile fleets (AMRs) and secure, high-speed plant synchronization.

Segmentation

Market Segmentation (1)



Automotive

EV-Driven Retooling:

Massive shift to flexible assembly for electric platforms and battery packs.

Smart Logistics:

High adoption of AMRs and private 5G networks for real-time line synchronization.

Digital Twins:

Full simulation of production cycles to minimize downtime during model changeovers.



Pharmaceuticals

GAMP/EMA Standards:

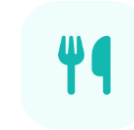
Automation validation is critical; traceability is non-negotiable.

Cleanroom Robotics:

Specialized hygienic robots for fill-finish operations and packaging.

AI Inspection:

Advanced vision systems for defect detection and LIMS integration.



Food & Beverage

Hygienic Design:

Stainless steel, wash-down ready robotics (Delta/Scara) for primary handling.

Vision Sorting:

Automated quality grading for produce, meats, and packaging integrity.

End-of-Line:

Strong growth in automated palletizing and ASRS to optimize warehousing.

Market Segmentation (2)



Logistics & E-commerce

AMRs & AGVs: Mass deployment of autonomous mobile robots for goods-to-person picking.

Picking-as-a-Service: RaaS models allowing seasonal scaling (Black Friday/Xmas).

WMS Integration: Deep connectivity between warehouse software and ERPs.



Energy & Utilities

DCS Modernization: Upgrading aging distributed control systems for cybersecurity.

Digital Twins: Simulation for predictive maintenance on turbines and grid assets.

Energy Optimization: AI-driven load balancing to integrate renewables.



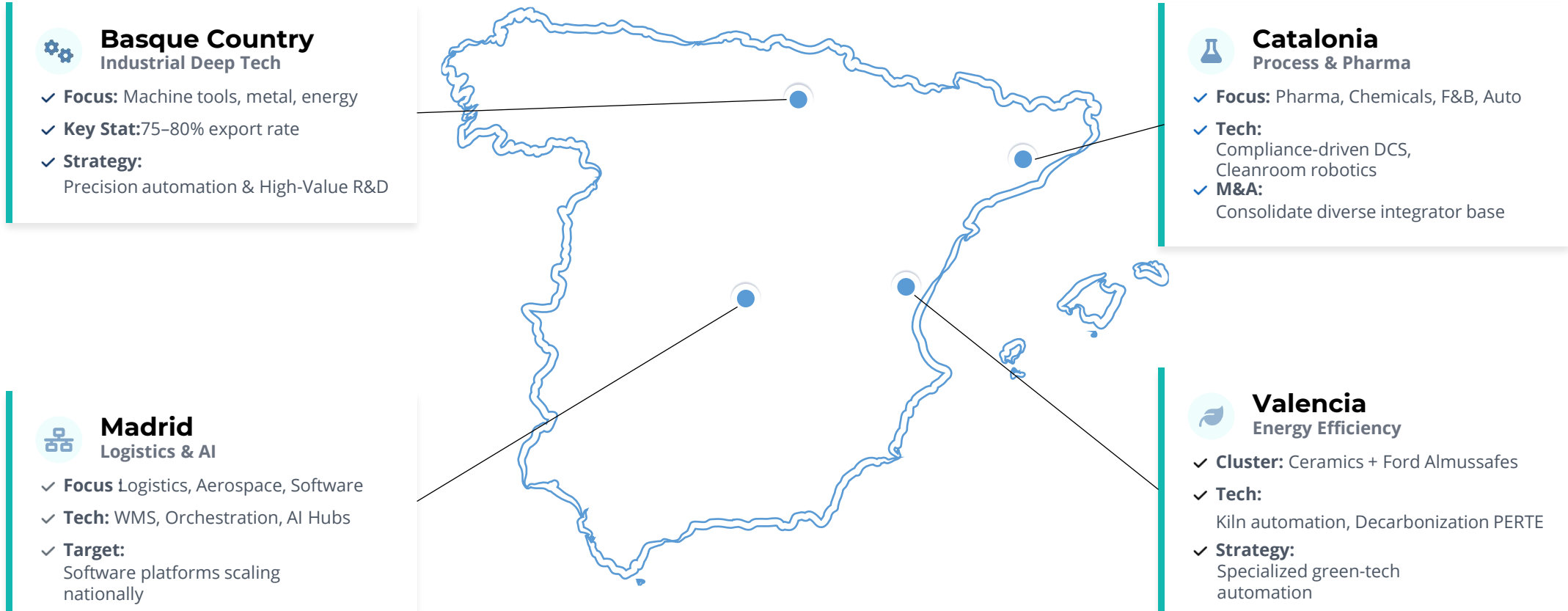
Cross-sector SMEs

Cobot Cells: Single-task robots for bottlenecks (welding, tending) without guarding.

Simple MES/ERP: Basic connectivity for compliance (Ley Crea y Crece).

Turnkey Bundles: Preference for standardized, low-code, "plug-and-play" packs.

Regional Distribution

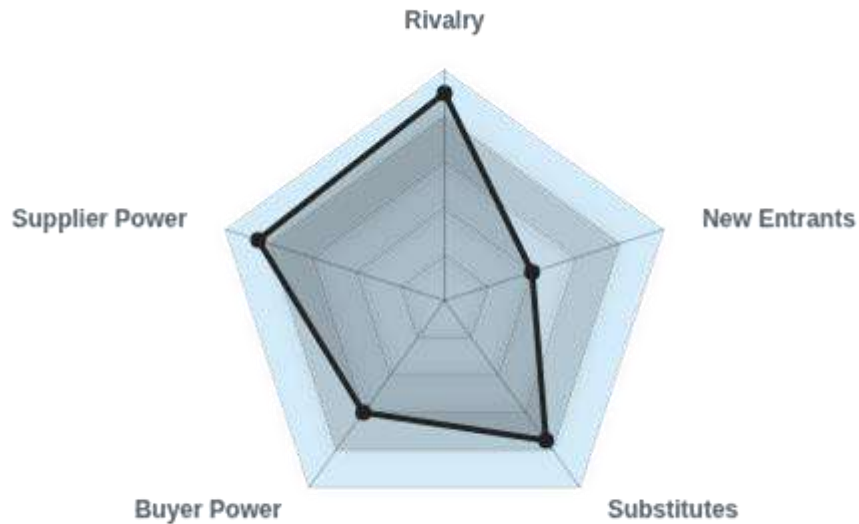


5F's Porter

- Summary
- End Users & Strategies
- Key Supplier Categories
- Complementary and Substitute products
- Competitive Landscape

Porter's Five Forces

Force Intensity Map



🏆 Competitive Rivalry

HIGH

Fragmented market **with ~65 System Integrators** fighting for SME contracts. Global OEMs are increasingly verticalizing (acquiring integrators) and disintermediating distributors to capture margin.

🏢 Supplier Power

HIGH

Oligopoly of platform owners (Siemens, Rockwell, ABB) dictates technical roadmaps and pricing. Proprietary "OS" ecosystems create deep dependency; **switching core vendors is operationally prohibitive.**

🔄 Threat of Substitutes

RISING

Non-traditional solutions are viable: **Exoskeletons** augment manual labor, **3D Printing** bypasses assembly lines, and **CDMOs** allow Pharma firms to outsource production entirely.

👤 Buyer Power

MODERATE

SMEs are price-sensitive on initial CapEx, but **"Integration Debt"** (legacy code/training) locks them in. Buyers trade pricing power for operational stability and certification compliance.

🏠 Threat of New Entrants

MODERATE

Barriers are high due to stringent regulations (ATEX, ISO 10218, CE) and acute talent scarcity (30k engineer deficit). However, software-only startups are entering via **low-code overlays.**

End-User Categories



Large Manufacturers

Require end-to-end, integrated automation. Focus on high validation, global standardization, and digital twin implementations.



Mid-market Factories

ROI-focused buyers seeking modular upgrades. High adoption of machine vision, brownfield retrofits, and intralogistics.



SMEs & Workshops

Entry-level automation. Demand single-cell cobots, low-code platforms, and grant-dependent "turnkey" bundles.



Pharma & Biotech

Compliance-driven. Require GMP/GAMP-validated robotics, cleanroom compatibility, and strict data integrity.



F&B Processors

Labor-substitution focus. Prioritize hygienic design, wash-down capability, fast changeovers, and end-of-line palletizing.



3PLs & Fulfillment

Scalability is key. Heavy users of AMRs, sorting systems, and WMS/MES integration for seasonal demand spikes.



Utilities & Process

Energy, water, chemicals. Focus on safety, uptime, legacy DCS modernization, and cybersecurity compliance.



Public Labs & Academia

Innovation hubs. Drivers of pilots, tech transfer, and workforce upskilling. Early adopters of experimental AI.

Go-to-Market Strategies



Partner-first Model

Leverage local integrators for **contextual intelligence**. Critical for penetrating niche sectors like ceramics (Castellón) or olive oil (Andalusia).



Region-Specific Plays

Tailor offerings by cluster: **Basque Country** (Machine Tools/Precision), **Catalonia** (Pharma/F&B), and **Madrid** (Logistics/ICT).



Land-and-Expand

Start with high-ROI pilots (e.g., single vision cell) to prove value, then scale to **digital twins** and plant-wide AI integration.



Servitization (TOTEX)

Adopt **RaaS/EaaS** models. Shift conversation from upfront CAPEX to long-term OPEX savings (TOTEX) to overcome SME price sensitivity.



Compliance-Led Selling

Position automation as a risk mitigation tool. Focus on **GAMP/GxP** validation, EU AI Act readiness, and industrial cybersecurity.



Co-Funding Navigation

Use grants orchestration as a sales asset. Align proposals with **PERTE VEC**, PERTE Chip, and "Kit Digital" to subsidize adoption.

Key Supplier Categories



Global OEM Platforms

Providers of core control stacks (PLCs, drives, robotics). Increasingly verticalizing by integrating proprietary software and cloud services.



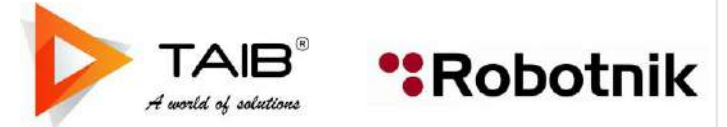
Component Makers

Specialized manufacturers of sensors, vision systems, actuators, and pneumatics. Essential for the data-acquisition layer.



System Integrators (Spain)

Local engineering firms handling design, commissioning, and maintenance. provide critical "contextual intelligence" for niche industries.



Software & AI Vendors

Providers of Industrial AI, digital twins, analytics, and cybersecurity. Often partnering with OEMs to deliver "smart" layers.



Field Service & MRO

Focused on lifecycle support, retrofits, upgrades, and ensuring uptime. Critical for maximizing asset longevity (TOTEX).



Complementary and Substitute products

COMPLEMENTARY SOLUTIONS

OT Cybersecurity

Mandatory compliance with **NIS2 & DORA** directives drives demand for network segmentation.

Energy & ESG Platforms

Automated scope 1 & 2 reporting for **CSRD compliance** and cost reduction.

Digital Twins & Edge AI

Virtual commissioning and local predictive optimization to reduce downtime.

AR Workforce Tools

Bridging the skills gap with remote expert assistance and digital overlays.

SUBSTITUTE PRODUCTS

Exoskeletons

Augmenting manual labor instead of replacing it, delaying full automation cells.

Additive Manufacturing (AM)

3D printing for prototyping and spare parts bypasses traditional production lines.

No-Code / Low-Code Cobots

Allows internal deployment by non-engineers, reducing integrator reliance.

In-House / Outsourcing

Large firms internalizing engineering or Pharma outsourcing to CDMOs.

Competitive Landscape

Global OEM Platforms



- 🏗️ **Core Strengths:** Own the entire control stack (PLCs, DCS, Robotics) and are expanding vertically into industrial software.
- 🔧 **Strategy:** Driving standardization and "platformization" of factories. Focusing on high-margin software/AI services.
- 🏭 **Role:** Provide the foundational infrastructure but often lack deep local niche customization.

Strategic Implication

Increasingly seeking to acquire or partner with local integrators to gain "last-mile" implementation capability in specific Spanish clusters.

Local Spanish Integrators



- 🏗️ **Core Strengths:** Deep "Contextual Intelligence" for specific verticals (e.g., ceramics in Castellón, auto in Vigo).
- 🔧 **Strategy:** Specialization in complex, custom integration. Agility in adopting new tech (Cobots, AMRs) faster than giants.
- 🤝 **Role:** Critical bridge between global platforms and end-user reality. Highly fragmented market structure.

Strategic Implication

Primary targets for M&A consolidation. Attractive for their sticky client relationships and engineering talent pool.

Value Chain

- Value Chain Components
- Value Chain Flow

Value Chain Components



Upstream Enabling

- **Institutional Framework:** Ministry policies and Industrial Policy 2030 provide foundational funding and legal recovery frameworks for modernization
- **Human Capital:** Elite technical universities (UPM, UPC, UPV) generate high-level talent, though 10% of AI graduates currently move abroad.
- **Research Clusters:** R&D hubs like Tecalia and Eurecat bridge the gap for SMEs, offering access to innovation without high internal overheads.



Core Delivery

- **OEM Dominance:** Global leaders (Siemens, ABB) control the "physical brain" layer, with PLCs alone valued at 1.27 billion USD in 2024.
- **Custom Engineering:** Specialized local System Integrators (SIs) transform generic hardware into bespoke solutions for Spanish industrial niches.
- **Software Logic:** Intelligence is defined at the programming stage, where a severe shortage of technical talent remains a primary chain bottleneck.



Downstream Interface

- **Automotive Vanguard:** Accounts for 50% of installations; value is driven by EV retooling and AGV integration for global export hubs.
- **Regulatory Guardians:** Pharma and Aerospace sectors demand tamper-proof audit trails and zero-error processing for "License to Operate."
- **Margin Optimization:** In Food & Beverage, automation serves as a survival lever against thin margins and chronic seasonal labor scarcity.

Value Chain Flow

01

Component & Software Sourcing

Hardware Component Sourcing:
Procurement of physical sensors, actuators, and controllers required to build complex industrial automation systems.

 **monolithic**

 **DICOMAT**

Industrial Communications Procurement

Sourcing specialized networking products and protocols to ensure seamless data flow between disparate plant devices.

 **e-soft**
Industrial Control & Communication Systems

 **OMRON**
INDUSTRIAL AUTOMATION

02

Design & Engineering

Custom Systems Engineering
Designing automated production lines and control panels tailored to specific vertical manufacturing requirements

 **voltec**
Industrial automation

 **IRUÑA**
TECNOLOGÍAS DE AUTOMATIZACIÓN S.L.

Control Logic Development:

Programming the software "brains" that dictate machine movement, safety protocols, and real-time production responses.

 **AETECH**

 **SIPRO**

03

Deployment & Implementation

On-Site System Installation
Transporting, setting up, and commissioning automated equipment directly within the client's industrial production facility

 **MECALUX ESMENA**

 **bama**
sistemas

IT/OT Interoperability

Syncing factory hardware with higher-level business management systems to ensure seamless and instant data visibility.

 **nexuSintegra**

04

Lifecycle Services & Maintenance

Long-Term Technical Support
Providing ongoing maintenance, software updates, and rapid-response repairs to maximize system lifecycle and performance.

 **SmartPM**

Predictive Maintenance-as-a-Service

















Real-time data monitoring to forecast equipment failures, significantly reducing unplanned downtime and repair costs

 **Sisteplant**
Dream Innovate Challenge

 **Geprom**
Part of Telefónica Tech

Significant Transactions - Spain

Significant Recent Transactions - Spain

Target		Target Description	Acquirer		Acquirer Description	Date
Keybotic		Manufactures autonomous industrial robot dogs for inspections in complex environments.	Helsing		German defense tech developing AI software and autonomous military drones.	2026
Stampack		Develops specialized simulation software metal forming and tool design optimization.	Autoform		Global supplier of sheet metal forming and die-making software solutions.	2025
Monolitic		Industrial hardware provider specializing in IoT solutions, edge technology, and components.	Becolve Digital		Spanish firm offering industrial automation and digital transformation software solutions.	2024
Ribinerf		Company designing innovative industrial machinery and AI-integrated robotic bin-picking software solutions.	Fagor Arrasate		Global manufacturer of custom metal forming and stamping machinery systems.	2023
Robotnik		European leader in designing and manufacturing mobile robots and mobile manipulators globally.	United Robotics Group		European group providing service robotics for industrial and professional applications.	2023
ASTI Mobile Robotics		International group providing automated guided vehicles and intralogistics connectivity for industrial automation.	ABB		Multinational leader specializing in electrification, industrial automation.	2021
ER-Soft		Firm specializing in industrial control and communication systems..	Becolve Digital		Specialist provider of industrial automation software and digital infrastructure solutions.	2020
Voltec		Specialized wholesaler providing high-quality innovative automotive solutions and technical advice.	Elion		Spanish manufacturer providing industrial automation and Industry 4.0 technical systems	2020

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