

Report Information

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Industrial Control System (ICS) Security Market Research Report - Forecast 2030

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Description:

Industrial Control System Security Market Size and Overview

Globally, the size of industrial control system security market is set to grow at a CAGR of 6.9%, estimated to reach USD 22 Billion by 2030 driven by improved efficiency and reduced production costs have been boosting the adoption of automation.

The transition to industry 4.0 is expected to bring several advances in efficiency and productivity and many challenges in how the industrial process works. Compared to the conventional manufacturing process, factors like improved efficiency and reduced production costs have been boosting the adoption of automation, which has been driving the demand for industrial control systems. However, the adoption of the industrial control system security solutions brings along the need for security as there is an exponential rise in cyber-attacks and networks security threats. The maximum majority of these systems require little or no authentication on the encryption for internal access.

The industrial control system security has been deployed to monitor the complex industrial processes and the critical infrastructures to deliver the power, water, transport, manufacturing, and other essential services. The automotive industry is among the primary sectors that hold a significant share of automated manufacturing facilities worldwide. The production facilities of various automakers are automated to maintain efficiency. The rising trend of replacing conventional vehicles with electric vehicles is expected to augment the automotive industry's demand further. The industrial control system security includes securing and safekeeping the industrial control systems and the software and the hardware used by the system. It focuses on keeping the processes and the machinery that runs through smoothly.

Covid-19 Analysis:

The impact of Covid-19 has led to the downfall of most small and large business institutions. But population across the globe has resorted to more smartphone users than usual. This is because of the lockdown and physical distancing measures. However, the industrial control system security market is expected to see a boom because of the work-from-home situations.

Industrial IoT devices and internet penetration need to be monitored remotely and offered security in industries. Hence, they require the adoption of cybersecurity for Industrial Control systems to tackle threats and cyber-attacks. Hence, the ICS security market will see rapid growth in the coming years, despite the pandemic.

Industrial Control System Security Market Dynamics:

Market Drivers:

A few factors may drive the growth of the Industrial Control System (ICS) security market size. Globally, the need for strong ICS security solutions is growing. Also, most industries are adopting IoT (Internet of Things), which contributes to the ICS security market growth. Moreover, all major countries are adopting globalization, corporate culture and swiftly spreading industrialization. Hence, these factors accelerate the growth of the industrial control system security market.

Market Opportunities:

The Control System Cyber Security has a lot of opportunities around the globe. Futuristic and advanced machinery in industries is also giving way to a lot of threats and cyber-attacks. Hence, Industrial Control System (ICS) security solutions are necessary to offer higher security for the advanced modern industrial machinery.

Market Restraints:

Some factors may hinder the growth of the Industrial Control System (ICS) Security market. Installing and maintaining ICS security solutions can be quite challenging. Moreover, these systems come with a high set-up cost. Hence, these factors may inhibit global market growth in the long run.

Market Challenges:

The ICS security systems are used to ensure security and convenience in the operation of modern industrial machinery. With the growing industrial internet penetration, the risk of cyber-attacks and threats is also high. So industries need to deploy ICS security solutions to tackle these issues. However, the high cost, difficult installation,

and high maintenance features may challenge ICS solution sales. It also slows down the global industrial control system security market growth.

Cumulative Growth Analysis:

The Industrial Control System security market was evaluated at USD 11.2 billion in the year 2017. But it is expected to reach more than 22 billion by the end of the forecast period (2022-2030). Due to the increase in the number of advanced network systems in the industrial environment, the risk of threats and cyber-attacks has also grown. Hence, the ICS cyber security business is anticipated to boom in the forecast years, especially post-Covid-19.

Technological Analysis:

The Industrial Control System (ICS) security solutions can be of several types such as Unified Threat Management (UTM), Data loss prevention, Antivirus, Firewall, and Distributed Denial of Service (DDOS). The ICS security systems also offer many types such as PLC, SCADA, and DCS.

Among them, the SCADA segment is anticipated to generate the highest profit. Its market value may reach up to USD 6 billion by the end of the forecast period. ICS security solutions also offer services such as Change in Management, Communication Services, Managed Support, and Risk Management. Among them, Risk Management may procure the highest Industrial Control System security market share.

Industrial Control System Security Market Segment Overview:

The industrial control system security market is divided into many segments such as system type, solution, service, and vertical. Listed below are the ICS security market segments:

Industrial Control System (ICS) Security System Type Outlook:

- SCADA
- PLC
- DCS
- Others

Industrial Control System (ICS) Security Solution Outlook:

- Unified Threat Management (UTM)
- Data loss prevention
- Antivirus
- Firewall
- Distributed Denial of Service (DDOS)

Industrial Control System (ICS) Security Service Outlook:

- Change in Management
- Communication Services
- Managed Support
- Risk Management
- Others

Industrial Control System (ICS) Security Vertical Outlook:

- Manufacturing
- Food & Beverage
- Energy & Power
- Transportation
- Others

Industrial Control System Security Market Regional Analysis:

The regional analysis of the ICS control systems market is divided into North America, Asia Pacific, Europe, Middle East & Africa, and the rest of the world over the forecast period from 2022 to 2027. The North American region is the most anticipated to dominate the control system cyber security market in the years to come. It accounts for 53.6% of the Industrial Control System security market share. It is expected to grow at a high CAGR of 5.59% over the market forecast.

The European region is also expected to witness stable market growth. The Asia Pacific region is also anticipated to witness a high CAGR because of the rise in industrialization and other factors. The ICS security systems help overcome advanced cyber-security challenges.

Industrial Control System Security Market Competitive Landscape:

The global ICS security market is dominated by a few companies that play an important role in the growth of the market. These leading ICS security companies are called key companies. They are responsible for the largest portion of the market profit generation. These companies adopt many Industrial Control System Security market trends to expand market growth such as new product launches, R&D initiatives, and M&A activities. The companies have major manufacturing resources and are engaged in various development activities.

Industrial Control System (ICS) Security Market Key Players:

Below are the key companies in the global ICS security market with the location of their headquarters:

- Rockwell Automation Inc. (US)
- BAE Systems (UK)
- Schneider Electric (France)
- ABB (Switzerland)
- Fortinet Inc. (US)
- Cisco Systems Inc. (US)
- Belden Inc. (US)
- Siemens AG (Germany)
- Check Point Software Technologies Ltd. (Israel)
- Honeywell International (US)
- AO Kaspersky (Russia)

Recent Developments:

Clarity:

- February 13, 2024- Launched its "Continuous Threat Detection" platform leveraging AI and machine learning for real-time anomaly detection in ICS environments.
- January 10, 2024- Partnered with Microsoft to integrate its ICS security solutions with Azure cloud platform.

Dragos:

- February 9, 2024- Unveiled its "Envoy Platform" providing comprehensive threat intelligence and incident response capabilities for ICS security.
- December 6, 2023- Collaborated with Cisco to enhance network security offerings for critical infrastructure.

Fortinet:

- February 6, 2024- Introduced its "FortiEDR" endpoint detection and response solution specifically designed for OT environments.
- January 25, 2024- Acquired CyberSense, expanding its OT cybersecurity portfolio and threat intelligence capabilities.

Report Overview:

This research report compiles all the information about the growth of the global Industrial Control System (ICS) security market over the forecast period. It also includes different sections of the ICS security market analysis to help obtain detailed information such as opportunities, challenges, drivers, Covid-19 analysis, regional analysis, competitive landscape, and others. Moreover, all the information is gathered from verified primary and secondary sources to deliver the expected market growth of the industry by the year 2027.

Report Details:

- Historic Period: 2020

- Base Year: 2021
- Forecast Period: 2022-2030

Geographically:

- Europe
- Asia-Pacific
- North America
- Middle East & Africa
- Rest of the World

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