

Asia-Pacific Industrial Control System Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The Asia-Pacific industrial control system market is expected to register a CAGR of 9.83% over the forecast period (2023 - 2028). The outbreak of the COVID-19 pandemic has triggered the manufacturing sector to re-evaluate its conventional production processes, fundamentally driving the digital transformation and factory automation practices across the production lines. Manufacturers are also collectively forced to devise and deploy multiple new and agile approaches to monitor product and quality control.??

With the advent of the Industrial Internet of Things (IIoT), the sheer volume of real-time data (Big Data) is expected to bring a massive change to the way control systems function at present. As per the latest survey by GE, 58% of manufacturers say IoT is required to transform industrial operations digitally. Accenture also predicts that IIoT could add USD 14.2 trillion to the global economy by 2030.

According to the X-Force Threat Intelligence Index 2020 from IBM, the threat targets on ICS and Operational Technologies (OT) assets have increased over 2,000% since 2018. The incidence of targeting OT assets in 2019 was more significant than the volume of activity observed in the past three years combined. The majority of these targets used a combination of known vulnerabilities within ICS hardware components and supervisory control and data acquisition (SCADA) in addition to brute-force login tactics such as password-spraying attacks.

Favorable government initiatives have helped strengthen the awareness and training of skilled workers in the smart factory environment. The government announced its plan to provide support to train 40,000 skilled workers to operate fully automated manufacturing sites through various educational programs while diversifying support. The government's present target of 30,000 smart factories by 2025 was increased from the previous goal of 10,000 by 2020 to keep pace with the fast evolution of complete

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digitalization and automation in the Fourth Industrial Revolution. In line with this, in 2020, the Korean government invested USD 414.4 million in R&D projects to incentivize SME companies to advance and upscale for technologies.

ICS and IT are, historically, not unified. Integration of their ICS with their IT departments is one of the most common challenges that organizations are facing. The need to integrate these two increased significantly with evolving industrial automation technology. However, due to the lack of coordination between the IT teams and processor operations departments, in most organizations, the security of ICS critical infrastructure is at risk of industrial espionage and sabotage. Further, the lack of required personnel to bridge the gap between operations and IT is also leading to complexity in the implementation of security systems.

APAC Industrial Control Systems Market Trends

Automotive is One of the Segments Driving the Market

The adoption of industrial control systems by various companies is a notable trend in the country. The advanced systems allow ease of production in factories. This also points to the gradual shift of companies from depending on manual labor to advanced technology-based systems that allow the automation of the facility.

Various companies are adopting new technologies to increase the annual outputs. For instance, Northern Copper Industry Co. Ltd, a company producing raw material copper stock in North China, selected ABB for the installation of an electrical and automation system, comprising ABB Ability System 800xA distributed control system (DCS), to optimize its production capacity and garner an annual output of 50,00 ton of rolled copper strip and foil production.

Convergence of IT and OT Networks May Drive the Market

More industrial companies are integrating their IT and OT networks to remain competitive and make better business decisions. The convergence of IT and OT enables more direct control and complete monitoring. The analysis of data from these complex systems can be executed without much effort from anywhere in the world.

However, the integration of these two technologies requires consideration of security. The majority of the OT systems were never designed for remote accessibility, and the connectivity risks were not considered. As a result, these systems may not be regularly updated, leading to vulnerabilities. This could leave critical infrastructure and organizations at risk of industrial espionage and sabotage.

With a more significant number of industrial control systems, sensors, and other controllers acting as Industrial Internet of Things (IIoT) endpoints due to the converged IT/OT network, organizations are more vulnerable to cyberattacks and increased security risk.

An attack on an OT or IT network can compromise assets due to the possibility of lateral movement. For instance, a successful attack on critical functions of a control system, such as electric power, clean running water, manufacturing processes, and life-saving healthcare treatments, could result in a corporate data breach, leading to a catastrophe. Similarly, infiltration of an enterprise IT network could lead to an ICS attack.

APAC Industrial Control Systems Market Competitor Analysis

The Asia-Pacific industrial control system market is moderately consolidated, with many market players cornering a very minimal share. The development of regional markets and increasing shares of local players in foreign direct investments are the major factors promoting the fragmented nature of the market.

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June 2021: The ABB Ability System 800xA 6.1.1 represented an evolution in automated control and plant operations for the future, solidifying ABB's position as the market player in DCS. The latest version of the company's flagship DCS enables decision-makers to future-proof their plants by improving industry collaboration.

July 2021: Schneider Electric, a player in energy management and automation's digital revolution, announced the availability of Geo SCADA as a Managed Service. The OT-oriented solution, a first in the industry, will allow customers to share the management and maintenance of their telemetry system with Schneider Electric. Schneider Electric's solution improves the internal support structure by removing the maintenance component, allowing domain specialists to enhance and develop the estate.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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