

## **Europe Industrial Control Systems Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

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### **Report description:**

The European industrial control systems market is expected to record a CAGR of 12.3% during the forecast period. The COVID-19 pandemic has forced manufacturing industries to re-evaluate their traditional production processes, primarily driving digital transformation and smart manufacturing practices across production lines. The manufacturers are also collectively being forced to devise and implement multiple new and agile approaches to monitor product and quality control.

? There is an increased need to reduce manufacturing costs and applications of the Internet of Things and machine-to-machine (M2M) technologies. According to a government-commissioned review, the manufacturing sector in the country can unlock GBP 455 million over the next decade and create thousands of jobs if it cracks the fourth industrial revolution.

? The majority adoption of automation tools is seen in the region's automotive and manufacturing sectors. IoT enables automated driving assistance, vehicle maintenance, passenger infotainment, and vehicle-to-vehicle communications in the automotive sector. For instance, in 2020, Ericsson and Audi partnered to establish a 5G collaboration to test Ultra-reliable Low-latency Communication (URLLC) capabilities for factory automation at the Audi P-Labs facility in Germany.

? The government's efforts to regulate and bolster the cybersecurity industry have suffered resistance from business associations. The opposition to the creation of a certification regime to rank firms based on their performance against cybersecurity metrics is hampering innovations to upgrade security. However, the country's industrial policy is aimed at encouraging private investment and human capital development in line with addressing the cybersecurity challenge.?

? The National Agency for Information Systems Security (ANSSI) proposed a similar class-based approach to deal with cyber security issues within France. The country's Industrial Cyber Plan aims at a voluntary information-sharing system (CERT-FR) to

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support a reporting mechanism, sharing of best practices among companies, sponsorship of crisis management exercises involving the private sector (Piranet), and certification schemes for cybersecurity firms.

? Aging hardware or software for ICS in a lot of organizations is another factor responsible for increased complexity. Most organizations still use legacy ICS owing to their importance in the functioning of the plant. This increased age of ICS creates ample opportunities for cyberattacks and leads to increased complexities.

## Europe Industrial Control Systems Market Trends

### Automotive Sector to Drive Market Growth

? The automotive sector is among the prominent sectors that hold a significant share of automated manufacturing facilities across the world. The production facilities of various automakers are automated to maintain efficiency. The growing trend of replacing conventional vehicles with electric vehicles (EVs) is expected to augment demand from the automotive sector further. For instance, the projected electric vehicle sales in Europe are expected to reach 6.33 million units by 2025, followed by China with 4.84 million units, according to UBS.

? Using artificial intelligence, the automotive sector's assembly lines have become more productive, efficient, and cost-effective. Industrial robotics on the shop floor, especially cylindrical robots, have transformed automobile production by automating the manufacturing process. For instance, in 2020, Techman announced that its collaborative robots had entered the supply chain of European and American car manufacturers.

? The E2EW series is optimized to withstand the harsh conditions of traditional automotive welding processes due to the fluororesin coating providing increased spatter resistance. The new sensors also support IO-Link capabilities, enabling real-time data gathering on proximity sensors' detection levels and temperature changes from a single location. Such sensors are also widely used in industrial sensors to detect long-range distances, collision avoidance, determining the size of objects, navigation, and others.?

? The International Automotive Components (IAC) implemented Manufacturing 4.0 and smart factory applications at the UK site in Halewood, England. This application deployed smart logistics, cross-company integration, and collaborative robots (cobots).? Moreover, German auto parts manufacturer Bosch has invested around EUR 31 million at its Indian plant to develop Industry 4.0 solutions.

### Rising Incidence of Cyberattacks is Among the Factors Driving the Market

? 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 previous 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.

? A survey conducted by ARC Advisory Group on the state of cybersecurity of Industrial Control Systems (ICS) recently indicated that around 70% of companies predict an attack on their OT/ICS infrastructure to be very likely. Similar results were found in research conducted by Siemens and Ponemon Institute. The survey results indicate that OT was at a higher risk of cyberattack than IT. About 54% of respondents expect that they will be stuck with at least one cyberattack on critical infrastructure within the next few years.

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? With cyberattacks increasing in smart factories in the US, there is growing concern about using Industrial Control Systems and the government has plans to curb the rise of such crimes. This is aligned with the growing usage of industrial control systems that are manufactured in the country for smart factories to avoid the risk of cybersecurity breaches. Companies like Panasonic North America offer complete smart manufacturing solutions, including ERP and others.

? Hence, over the past few years, oil and gas companies have invested heavily into cybersecurity technologies, such as incident response solutions and software capable of collecting logs in ICS environments to enhance visibility and segmenting networks, prevent lateral movement, and eliminate imminent threats.

#### Europe Industrial Control Systems Market Competitor Analysis

The European factory industrial control system market is moderately fragmented due to the presence of several players in the market. Players are primarily involved in product development and strategic activities such as partnerships, mergers, and acquisitions. Some of the key developments in the market are:

? In April 2021, Schneider Electric released version 21.1 of EcoStruxure Automation Expert, its software-centric universal automation system. Among other advancements, EcoStruxure Automation Expert V21.1 includes enhanced cybersecurity, diagnostics, discovery and commissioning features, and expanded libraries and language support. This new technology is expected to be beneficial for consumer-packaged goods, pharmaceutical, and logistics enterprises.

? In March 2021, McLean Technology Group (MTG) employed ABB to deliver automation, electrification, and instrumentation solutions at Nashville's Central Wastewater Treatment facility, managed by Metro Water Services (MWS). Additionally, ABB will provide control system optimization via a second control system that will standardize all MWS water and wastewater plant operations of the project.

Additional Benefits:

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

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