

Asia-Pacific Industrial Control System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 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% during the forecast period.

Key Highlights

- With the advent of the Industrial Internet of Things (IIoT), the sheer volume of real-time data (Big Data) is expected to change how control systems function. As per the latest survey by GE, 58% of manufacturers say IoT is required to transform industrial operations digitally. Accenture predicts IIoT could add USD 14.2 trillion to the global economy by 2030.
- According to IBM's X-Force Threat Intelligence Index of the last year, the threat targets on ICS assets have increased by over 50% year-over-year. Most of these targets used a combination of known vulnerabilities within ICS hardware components, supervisory control and data acquisition (SCADA), and brute-force login tactics such as password-spraying attacks.
- Furthermore, to support the decline of Korea's working-age population, the country intends to establish 20 smart industrial zones by 2030. The goal is to install 2,000 new AI-powered smart factories by 2030 to keep up with the rapid evolution of complete digitalization and automation in the Fourth Industrial Revolution era.
- ICS and IT need to be more unified. Integration of ICS with their IT departments is one of the most common challenges organizations face. 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, the security of ICS critical infrastructure is at risk of industrial espionage and sabotage in most organizations. Further, the need for more personnel to bridge the gap between operations and IT complicates the implementation of security systems.

APAC Industrial Control Systems Market Trends

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Automotive sector is likely to drive the market

- The widespread use of industrial control systems by businesses is a notable trend. The advanced systems facilitate factory production. This also indicates a gradual shift in companies' reliance on manual labor to advanced technology-based systems that allow facility automation.
- Various businesses are implementing new technologies to increase annual outputs. For example, Northern Copper Industry Co. Ltd, a company in North China that produces raw material copper stock, chose ABB to install an electrical and automation system that included an ABB Ability System 800xA distributed control system (DCS) to optimize its production capacity and achieve an annual output of 50,000 tonne of rolled copper strip and foil production.
- Significant initiatives have resulted in increased attention being given to digitalization and Industry 4.0 in the automotive sector of the region, such as Singapore's Smart Nation, similar to Indonesia's "2020 Go Digital Vision," the "Thailand 4.0" initiative, and the Vietnamese government's Industry 4.0 initiatives, amongst others.
- The increasing investments by all large automotive companies in smart manufacturing are further expected to drive the ICS market in the region. For instance, in June 2022, BMW opened a new CNY 15 billion (USD 2.2 billion) factory in China, emphasizing electric vehicles, to catch up with leaders Tesla and domestic competitors.
- Over the years, automotive manufacturing plants have become highly automated with massive deployments of autonomous operations and control systems from welding and painting to assembly. Control systems, robots, intelligent sensors, and other equipment are becoming interconnected to drive higher productivity and outputs. At the enterprise level, the manufacturing execution system (MES) and distributed control system (DCS) are also moving toward interoperability to optimize production further.

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. Data analysis from these complex systems can be executed with little effort from anywhere in the world.
- However, the integration of these two technologies requires consideration of security. Most OT systems were never designed for remote accessibility, and the connectivity risks were not considered. As a result, these systems may need to 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, an enterprise IT network infiltration could lead to an ICS attack.

APAC Industrial Control Systems Industry Overview

The Asian-Pacific industrial control system market is moderately consolidated, with many market players cornering a 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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- April 2022: ABB collaborated with Samsung Electronics to develop holistic energy management solutions to propel the advancement of smart building technology. The development will allow ABB to provide more customers access to home automation technologies and device management solutions. In the robotics domain, the company collaborated with ETH Zurich on the latter's RobotX robotics research initiative.
- Feb 2022: ABB and Keppel signed a memorandum of understanding for digital collaboration in Singapore. This collaboration helps in stepping up digital transition in water management and synergy to facilitate pathways to decarbonization and zero-emission.

Additional Benefits:

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

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