

Europe ICS - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe ICS Market is expected to register a CAGR of 12.3% during the forecast period.

Key Highlights

- There is a rise in the need to decrease 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 (USD 550 million) over the next decade and create thousands of jobs if it cracks the fourth industrial revolution.
- The bulk adoption of automation tools is witnessed in the region's automotive and manufacturing sectors. IoT allows automated driving assistance, vehicle maintenance, passenger infotainment, & vehicle-to-vehicle communications in the automotive industry.
- The government's efforts to control and maintain the cybersecurity industry has suffered opposition from business associations. The resistance to building 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 aims to encourage private investment and human capital development in line with addressing the cybersecurity challenge.?
- The ANSSI (National Agency for Information Systems Security) suggested a similar class-based approach to dealing with cyber security issues within France. The country's Industrial Cyber Plan strives for a voluntary information-sharing system (CERT-FR) to help a reporting mechanism, sharing best practices among companies, sponsorship of crisis management exercises involving the private sector (Piragnet), and certification schemes for cybersecurity firms.
- Aging hardware or software for ICS in numerous organizations is also a factor for increasing complexity, as many organizations even use inheritance ICS due to their importance in the functioning of the plant. The advanced age of ICS creates excellent opportunities for cyberattacks and increases complexities.
- The COVID-19 pandemic has forced manufacturing industries to re-evaluate their traditional production processes, mainly driving digital transformation and smart manufacturing practices across production lines. The manufacturers are also forced to develop

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and execute multiple new and agile techniques to monitor product and quality control.

Europe Industrial Control Systems Market Trends

Automotive Sector to Drive Market Growth

- The automotive sector is among the major industries with a significant share of automated manufacturing facilities worldwide. The production facilities of different automakers are automated to maintain efficiency. The increasing trend of substituting conventional vehicles with electric vehicles (EVs) is anticipated to augment demand from the automotive sector further. For instance, Europe's projected electric vehicle sales are expected to reach 6.33 million units by 2025, followed by China with 4.84 million units, according to UBS.
- Artificial intelligence has completed automotive assembly lines more productive, efficient, and cost-effective. Industrial robotics on the shop floor, mainly cylindrical robots, have changed automobile production by automating manufacturing.
- The E2EW series is optimized to withstand the extreme conditions of traditional automotive welding processes owing to the fluororesin coating giving improved spatter resistance. The new sensors also support IO-Link capabilities, allowing real-time data gathering on proximity sensors' detection levels & temperature changes from a single location. These sensors are also broadly employed in industrial sensors to detect long-range distances, collision avoidance, determine the size of objects, navigation, and others.?
- The International Automotive Components (IAC) implemented Manufacturing 4.0 & smart factory applications at the UK site in Halewood, England. This application installed smart logistics, cross-company integration, & collaborative robots (cobots).? Also, German auto parts manufacturer Bosch has invested around EUR 31 million (USD 32.8 million) at its Indian plant to develop Industry 4.0 solutions.
- According to ACEA (European Automobile Manufacturers Association), around forty-four percent of new car registrations in the European Union (EU) were electrified to some degree in 2022. New registrations of battery electric vehicles increased by about twenty-eight percent to reach some 1.12 million units, while diesel & petrol registrations slumped. As of 2022, approx. Sixteen percent of newly registered passenger cars in the European Union were running on diesel, and approx thirty-six percent were fueled by petrol.

Rising Incidence of Cyberattacks is Among the Factors Driving the Market

- According to IBM's X-Force Threat Intelligence Index 2022, the threat targets on ICS and Operational Technologies (OT) assets have increased. For instance, between January and September of 2021, X-Force observed a 2204% increase in malicious reconnaissance activity targeting port 502. 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.
- 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. Siemens and Ponemon Institute conducted research and also found similar results. The survey results indicate that OT had a higher chance of cyberattack than IT. About 54% of respondents expect to be stuck with at least one cyberattack on critical infrastructure within the next few years.
- With cyberattacks increasing in smart factories in the US, there is growing concerned about using Industrial Control Systems, and the government has strategies to curb the rise of such crimes, which is aligned with the increasing usage of industrial control systems manufactured in the country for smart factories to prevent the risk of cybersecurity breaches. Companies like Panasonic North America offer complete smart manufacturing solutions, including ERP.
- According to ENISA, between April 2020 and July 2021, European public administrations were the target of 198 cyber incidents,

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making them the biggest targeted sector. Digital service providers were second on the list, with 152 incidents. The financial sector was fifth, with 97 cyber incidents. Such factors allow the market vendor to grow in the region.

- Hence, over the past few years, oil and gas companies have invested heavily in 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 Industry Overview

The European factory industrial control system market needs to be more cohesive due to 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:

- September 2022 - XOne Networks, a leader in ICS and industrial IoT (IIoT) security, and Valmet announced a partnership. Together the companies plan to equip joint industrial automation customers with the protection they require for current vulnerable OT (Operational Technology) environments. The mixture of TXOne Networks' solutions for security inspection, endpoint protection, and network defenses with the top Valmet DNA Distributed Control System (DCS), Valmet IQ Quality Control System (QCS), Machine Vision, Analyzers & Measurements, Valves, and Industrial Internet, presents various advantages: It improves the ability of industrial customers to guard better, respond, and recover from a cybersecurity incident with Valmet's Cybersecurity Services.
- July 2022 - ABB and SKF entered into a Memorandum of Understanding (MoU) to analyze the possibilities for collaboration in the automation of manufacturing processes. The MoU was signed at ABB's Robotics Experience Center in Vasteras, Sweden. Through the partnership, ABB and SKF will recognize and assess solutions to enhance manufacturing capabilities and support clients in boosting production efficiency.

Additional Benefits:

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

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