

## **Industrial Control Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Industrial Control Systems Market size is estimated at USD 201.77 billion in 2025, and is expected to reach USD 309.03 billion by 2030, at a CAGR of 8.9% during the forecast period (2025-2030).

The rising cost of labor and the immense pressure on manufacturers to meet strict deadlines are resulting in the increased deployment of automation in factories. The automation of factories has fueled the market for ICS.

#### Key Highlights

- Connecting the industrial equipment and machinery and obtaining real-time data have played a key role in the adoption of SCADA, HMI, PLC systems, and software that offer visualization, thus, enabling reducing the faults in the product, reducing downtime, scheduling maintenance, and switching from being in the reactive state to predictive and prescriptive stages for decision-making.
- In addition, the quality control issue involved with human error is minimized, owing to the systems' efficiency, reliability, and faster work rate. Moreover, the demand for mass production in manufacturing industries fuels the need for industrial controls to cater to the demands of growing population.
- Moreover, government efforts such as Germany's Industry 4.0 and France's industrial plan are likely to drive demand for IIoT solutions, which may, in turn, enhance demand for ICS security solutions and services in the future. A serious cyber catastrophe may result in significant financial losses, brand damage, consumer trust loss, intellectual property theft, safety concerns, and even death. As a result, to protect its ecosystem from any financial, operational, or human losses, ICS may need security mechanisms to audit and assure compliance.
- Due to the high rate of adoption of connected devices and sensors and the enabling of M2M communication, there has been a surge in the data points generated in the manufacturing industry. According to Zebra's latest manufacturing vision report, IoT and

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RFID-based smart asset tracking solutions are expected to overtake traditional, spreadsheet-based methods by 2022.

- The pandemic's impact has forced organizations to adhere to strict requirements while ensuring their employees' and customers' safety. As a result, the need for automated solutions witnessed a sudden spike. This could be observed as a notable trend in the foreseeable future. As the world continues to fight the spread of the COVID-19 pandemic, factory automation with robotics plays a crucial role in helping safeguard people and processing the supplies needed by the end user.

## Industrial Control Systems Market Trends

### Food and Beverage Sector to Widely Use Industrial Control Systems

- The demand for the food and beverage industry is growing yearly because of the economy's growth and disposable incomes. The increasing population is also contributing to this industry.
- Moreover, the demand for processed goods is increasing, with increased buying power and changing lifestyles. This has made it necessary for food manufacturers to implement automation to improve the processing rate to meet consumers' demands. Furthermore, the rapid development of computer technology, dynamic changes in consumers' preferences, and regulatory bodies have boosted the need for food quality and safety. This has resulted in the growing adoption of automated systems in the food industry.
- In June 2022, PepsiCo India announced an additional INR 1.86 crore investment in expanding its food manufacturing plant in Kosi Kalan, Mathura, Uttar Pradesh, to produce the Doritos cornflakes brand. PepsiCo's total investment in its largest Greenfield Foods manufacturing plant, which manufactures Lay's potato chips, will reach INR 1,022 crore.
- Moreover, the Pet food manufacturer plans to invest USD145 million in a 200,000 expansion and equipment upgrades at their FORT SMITH, AR processing facility. The project has recently received approval. The project is expected to be completed in 2022, further driving the market growth.
- Successful integration of different automation stages in the food and beverage industry leads to value-creation in the supply chain, which ensures a long-term competitive edge and efficient production. Hence, food companies are finding ways to improve reliability, increase productivity, reduce waste, and decrease total costs through process automation. This automation requirement also makes controls significant to a company's production.
- In addition, the adoption of process automation has also reduced the number of workers required per plant while providing flexibility in product pricing for industrial operators. Such a rising need for controlling significant expenses is likely to further proliferate the growth of the industrial process automation market during the forecast period.

### North America to Dominate the Market

- North America is on the verge of the fourth industrial revolution. The data generated is being used on a large scale for production while integrating the data with various manufacturing systems throughout the supply chain.
- The region is also one of the largest automotive markets in the world and is home to over 13 major auto manufacturers. Automotive manufacturing has been one of the largest revenue generators, in the region, in the manufacturing sector. As the automotive industry accounts for the significant adoption of industrial control systems and automation technologies, the region offers a huge opportunity for market growth.
- Multiple major key vendors operating in the country are launching new updates to help in the growth of smart factories with developments in industrial control systems. Such technological advancement is indicative of the growth of the region in the studied market.?
- Moreover, supporting government policies and competitively priced natural gases are enabling the US and Canadian chemical

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companies to build plants, expand, automate, and control their facilities. Hence, the growth of industrial controls in the North American region is also expected to further drive the market studied over the forecast period.

- General Motors signed three sourcing agreements for EV battery materials in August 2022, potentially aiding the automaker in achieving its objective of manufacturing one million EVs annually. The multi-year contracts with LG Chem, POSCO Chemical, and Liventwill supply GM with critical materials such as lithium, nickel, cobalt, and active cathode material (CAM). Such expansion in the automotive sector in the country may further create significant demand for PLCs.
- The country is one of the largest crude oil producers and a prominent oil and gas industry player. For instance, according to EIA, by 2030, the production is expected to reach 30.01 quadrillions Btu in the region. Texas produces the major share of crude oil in the country and is expected to generate significant demand for production equipment.

## Industrial Control Systems Industry Overview

The industrial control system market is fragmented. The players are focusing on R&D activities to attain a competitive advantage. These key players compete based on innovation, pricing, and service. Expansion in the emerging market helps the established key players to extend their sales networks. GE Digital, Siemens AG, Schneider Electric AG, SAP, ABB Group, Fanuc, Honeywell International Inc., Bosch, and Cisco Systems are some companies that provide the industrial internet platform.

- Sep 2022 - The OpreXMagnetic Flowmeter CA Series has been released and reported by Yokogawa Electric Corporation. The OpreXField Instruments family is releasing this new product series to replace the ADMAG CA Series. This new line of products includes capacitance-type magnetic flowmeters, which can measure the flow of conductive fluids via a measurement tube without the fluids touching the device's electrodes. The product's main target markets will be chemicals, paper and pulp, mining, food and beverage, water, and sewerage.
- Aug 2022 - OMRON has unveiled i-Data-Managed Solution Service Implementation (i-DMP). This data-centric solution will enable the clients to solve their issues in a timely manner by simplifying the integration of various types of data, which was never intended for the purpose of improving factory floors. The i-DMP will gather and store data, as needed, dispersed throughout the manufacturing floor, such as those from existing systems and PLCs, in the edge region in real time for uniform data management. It is connected to various networks, relational databases (RDB), and factory automation (FA) devices.

### Additional Benefits:

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

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