

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

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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### **Report description:**

The NA ICS Market is expected to register a CAGR of 3.2% during the forecast period.

#### **Key Highlights**

- There is a growing demand for automation and customized service solutions in industrial applications. The advent of technology over the past few years has enabled the coupling of mechanical devices with computer-based systems to operate and control production; this has resulted in the development of automated equipment capable of significantly higher production rates, effortless monitoring, and reduced wastage over traditional machines.
- The rising cost of labor, coupled with the immense pressure on manufacturers to meet deadlines, has resulted in the increased adoption of automation in factories. Additionally, improved efficiency and reduction in production costs compared to the conventional manufacturing process are boosting the adoption of automation, which is acting as a driver for industrial controls.
- The connectivity of networks in the manufacturing process and efficiency in production by automation are expected to change the traditional business operations and create ample opportunities in the future.
- The manufacturing sector is a crucial aspect of the region's GDP, indicating economic health. The market for industrial controls is undergoing significant transformations in North America.
- According to the Department of Homeland Security (DHS), 85% of the critical infrastructure in the US, such as oil & gas, banking and finance, transportation, utilities, electric power grids, and defense, are owned by the private sector, and the public sector regulates the rest. For example, the energy and power grid sector in the region requires public, private, and regulatory cooperation among DHS, the Department of Energy (DOE), and the Department of Defense (DOD) for protecting their Operational Technology (OT) and ICS systems from cyber threats. Moreover, this region is witnessing the widespread adoption of cloud-based ICS security solutions and services.

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## North America Industrial Control Systems Market Trends

### Increasing Smart Grid Installation in United States and Canada is Expected to Drive the Market

- The North American region is 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.
- The North American region has witnessed the accelerated deployment of smart grids meant to improve the reliability and efficiency of utility operations, including the deployment of systems and practices to better engage utility customers in the management of energy.
- The Supervisory Control and Data Acquisition System (SCADA) lies at the core of smart grid decision-making and line sensors, and other connected equipment on a smart grid provides a stream of data back to a central control room, where information is analyzed, and decisions are automatically made, thereby, regulating voltage levels and optimizing efficiency, routing, and generation. Thus, the deployment of Smart Grid is expected to fuel the demand for the studied market in North America.
- The New York State Energy Research and Development Authority (NYSERDA) is an example of a leader in supporting and financing the development and adoption of smart technologies. The New York State government has invested in the innovation of smart energy technologies as the region pursues to improve grid reliability, expand clean energy technologies, reduce carbon emissions and keep energy bills low under its Reforming the Vision program. All these steps are expected to drive the country towards efficient, advanced, and cleaner systems.
- Furthermore, under its smart grid program, the Govt. of Canada is planning to spend USD 100 million over four years. This is expected to drive the growth of the ICS market in this region.

### Increasing Investment in Oil and Gas sector in United States is Expected to Drive the Market

The oil and gas industry is home to a number of government regulations for safety, reliability in plants, and efficiency, owing to which the ICS finds applications in Remote Terminal Units (RTU) and pumping and compression stations for ensuring safety.

- United States is the leading oil-producing country in the world, with its output rising by a massive 1.7 million b/d, during fiscal 2020, according to BP data. The country has various regulations, such as The Mineral Leasing Act, the Outer Continental Shelf Lands Act, the National Environmental Policy Act, etc.
- According to EIA, US production is expected to increase Y-o-Y, owing to the growing production efficiencies and growing resource base. The US crude oil output is expected to increase to 20% by 2030, despite the lower oil prices.
- Various oil and gas vendors, such as Abraxas Petroleum and Chevron, are already driving their network to digitalization projects and adopting IoTs in their network. ICS vendors are increasingly offering industry-specific products; for example, Emerson has launched the DeltaV PK Controller, which helps in making the advanced automation of its DeltaV distributed control system available to fast-growth industries, which are less reliant on large-scale automation.

## North America Industrial Control Systems Industry Overview

The North American industrial control systems market is moderately concentrated due to higher initial investments. It is dominated by a few major players like Rockwell Automation Inc., Emerson Electric Co., General Electric Co., Honeywell

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International Inc., and Texas Instruments Inc. These significant players, with a prominent share in the market, are focusing on expanding their customer base across foreign countries. These companies are leveraging strategic collaborative initiatives to increase their market share and increase their profitability. However, with technological advancements and product innovations, mid-size to smaller companies are growing their market presence by securing new contracts and tapping new markets.

- Jun 2021 - Honeywell introduced Advanced Monitoring and Incident Response (AMIR) service. The service provides 24/7 operational technology (OT) cybersecurity detection and rapid response for current and emerging cyber threats to help industrial organizations identify and mitigate emerging cyber threats, manage overall risk and demonstrate compliance.
- Jul 2021- MITRE Engenuity released results from its first round of independent MITRE Engenuity ATT&CK Evaluations for Industrial Control Systems (ICS). The evaluations examined how cybersecurity products from five ICS vendors detected the threat of Russian-linked Triton malware. The evaluations use ATT&CK for ICS, a MITRE-curated knowledge base of adversary tactics, techniques, and procedures based on known threats to industrial control systems.
- Jun 2020- Check Point Software Technologies Ltd., a leading provider of cybersecurity solutions globally, announced the new 1570R rugged security gateway to protect networks in critical infrastructure, Industrial Control Systems (ICS), and SCADA systems against all types of advanced Gen V cyber-threats. The 1570R delivers unrivaled performance, threat prevention security technology, ease of deployment and control, and reliability to the most demanding industrial settings such as power plants, automated factories, and maritime fleets.

#### Additional Benefits:

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

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