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

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Industrial Control Systems Market Analysis

The industrial control systems market size stood at USD 204.03 billion in 2025 and is projected to reach USD 305.17 billion by 2030, advancing at an 8.38% CAGR. Accelerated digitalization under Industry 4.0, mounting cybersecurity obligations, and the growing appeal of open, vendor-neutral architectures are reinforcing automation as an operational cornerstone rather than an efficiency add-on. Heightened supply-chain risk during the 2024 semiconductor squeeze underscored the value of software-defined control platforms that detach functionality from dedicated hardware, while government incentives in Europe and North America widened the capital pool for retrofit projects. Cloud, edge, and on-premise deployments now coexist as manufacturers seek analytics at scale without surrendering low-latency process control. Competitive positioning increasingly favors vendors that combine interoperable hardware with AI-enabled software and integrated security, especially in high-precision sectors such as electronics and life sciences.

Global Industrial Control Systems Market Trends and Insights

Industry 4.0 Roll-outs Accelerating Plant-wide Automation

Manufacturers are extending automation from isolated lines to enterprise-wide networks that merge operational, engineering, and business data. AI-ready edge nodes such as Siemens SINUMERIK ONE now execute predictive maintenance and adaptive feed-rate control directly on the machine floor, shrinking decision latency. Broader connectivity generates compound value, which explains why average OT budgets grew 30% in 2025 despite macro headwinds. As a result, interoperable offerings are edging out proprietary point products, reshaping competitive dynamics across the industrial control systems market.

Growing Emphasis on Industrial Safety and Functional-Safety Compliance

Industrial regulations are converging around dual mandates of safety integrity (IEC 61508/61511) and cybersecurity resilience (IEC 62443). Tools such as Siemens SIBERprotect isolate compromised assets within milliseconds while keeping safety loops intact, making certified safety PLCs and secure communication protocols indispensable. With CISA releasing 24 advisories on OT vulnerabilities in 2024, buyers now factor cyber-safety credentials into capital planning, nudging the industrial control systems market toward vendors that offer natively integrated capabilities.

Shortage of Skilled OT/ICS Engineers

Deloitte estimates 1.9 million US manufacturing roles may go unfilled by 2033, many requiring hybrid IT-OT skills. Scarcity inflates labor costs and prolongs commissioning cycles, prompting vendors to bundle managed services and low-code configuration to soften onboarding friction.

Other drivers and restraints analyzed in the detailed report include:

Surge in Demand for Real-time Data-driven Mass-customisation / Government Incentives for Smart-factory Retrofits / High Capex and Long Pay-back Periods /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

SCADA platforms retained a 28.7% slice of the industrial control systems market in 2024, yet their centralized approach is being contested by edge-enabled PLCs that are posting 11.46% CAGR through 2030. The influx of micro-AI chips allows PLCs to process condition-monitoring and quality-inspection workloads locally, reducing data backhaul and network congestion. In oil & gas and chemicals, Distributed Control Systems still govern continuous processes, but customers are layering predictive algorithms over legacy DCS to extend asset life. Human-Machine Interfaces have evolved into decision-support consoles incorporating AR overlays for on-the-spot troubleshooting. Intelligent Electronic Devices are gaining traction in utilities as grid operators pursue faster fault isolation. Across these use cases, the industrial control systems market rewards suppliers that embed open APIs, enabling plant managers to mix best-of-breed components without vendor lock-in.

With SCADA still contributing USD 58.5 billion to industrial control systems market size in 2025, upgrade cycles center on container-based micro-services that keep supervisory layers intact while injecting analytics. Meanwhile, pilot programs in discrete manufacturing show edge PLC clusters trimming unplanned downtime by up to 20%, accelerating payback. Vendors able to harmonize lifecycle services for both centralized and distributed architectures are expected to capture disproportionate share.

Asset Performance Management generated 23.6% of 2024 revenue as plants chase overall equipment effectiveness and schedule-free maintenance. Looking ahead, cybersecurity suites are set to outpace all other categories at 12.75% CAGR, a reaction to increased ransomware targeting OT assets. Integrated offerings that fuse vulnerability scanning, zero-trust segmentation, and safety-PLC hardening resonate with risk-averse sectors such as pharmaceuticals. Manufacturing Execution Systems now bundle quality analytics and electronic batch records, while Product Lifecycle Management tools couple with digital twins to bridge design and production. ERP vendors are exposing OT data models via REST APIs, feeding demand-driven planning algorithms. The industrial control systems market is therefore tilting toward platforms that orchestrate cross-domain data rather than discrete modules.

Industrial cyber platforms, forecast to exceed USD 14 billion in industrial control systems market size by 2030, are attracting venture funding and prompting established vendors to buy niche specialists. Suppliers competent in synchronizing APM, MES, and cyber layers position themselves as single-throat-to-choke partners for digital transformation roadmaps.

The Global Industrial Control Systems Market Report is Segmented by Operational Technology (SCADA, DCS, PLC, and More), Software (APM, PLM, MES, ERP, and More), Deployment Mode (On-Premise, Cloud-Based, Edge/Hybrid), End-User Industry (Oil and Gas, Chemical and Petrochemical, Power and Utilities, Food and Beverages, Automotive and Transportation, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Europe steers 28.5% of 2024 revenue, driven by rigorous functional-safety statutes and sustainability mandates that reward high-efficiency automation. Funding schemes such as Manufacturing-X distribute EUR 150 million (USD 161 million) to projects that emphasize data sovereignty, giving domestic vendors an early-mover edge. Capital projects increasingly bundle carbon-footprint dashboards, aligning with the EU's Green Deal reporting. Eastern European clusters act as near-shore capacity for Western OEMs, stimulating incremental demand for mid-tier control gear.

Asia-Pacific, advancing at 10.24% CAGR, benefits from large-scale capacity expansions in electronics, EV batteries, and renewable components. China's demographic headwinds and wage inflation accelerate factory automation, while Southeast Asian nations leverage tax incentives to lure reshoring projects. Domestic PLC and robot suppliers are gaining share, but multinational incumbents retain dominance in high-end safety and motion solutions. Government cyber rules, notably China's Critical Information Infrastructure law, push buyers toward products with verifiable security lineage, shaping procurement shortlists.

North America sustains momentum through reshoring initiatives and the CHIPS Act's USD 200 million digital-twin program. Energy transition spending in the US Gulf Coast is spawning demand for open-process automation to retrofit LNG, hydrogen, and CCS facilities. Canada's NGen USD 35 million sustainable manufacturing challenge propels SME adoption of modular control kits. Heightened cyber directives from CISA elevate procurement specifications, giving advantage to suppliers with IEC 62443 certifications. Collectively, these trends keep the industrial control systems market on a diversified regional growth footing.

List of Companies Covered in this Report:

Siemens AG / ABB Ltd. / Rockwell Automation Inc. / Schneider Electric SE / Honeywell International Inc. / Emerson Electric Co. / Yokogawa Electric Corporation / Mitsubishi Electric Corporation / Omron Corporation / GE Digital (General Electric Co.) / Bosch Rexroth AG / Phoenix Contact GmbH / Beckhoff Automation GmbH / Hitachi Ltd. / Delta Electronics Inc. / Advantech Co., Ltd. / Johnson Controls International plc / Fortinet Inc. (ICS-cybersecurity) / Palo Alto Networks Inc. (ICS-cybersecurity) / ICS-Secure LLC /

Additional Benefits:

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

Table of Contents:

5.3 By Deployment Mode
5.3.1 On-premise
5.3.2 Cloud-based
5.3.3 Edge / Hybrid
5.4 By End-user Industry
5.4.1 Oil and Gas
5.4.2 Chemical and Petrochemical
5.4.3 Power and Utilities
5.4.4 Food and Beverages
5.4.5 Automotive and Transportation
5.4.6 Life Sciences
5.4.7 Water and Wastewater
5.4.8 Metal and Mining
5.4.9 Pulp and Paper
5.4.10 Electronics and Semiconductor
5.4.11 Other End-user Industries
5.5 By Geography
5.5.1 North America
5.5.1.1 United States
5.5.1.2 Canada
5.5.1.3 Mexico
5.5.2 Europe
5.5.2.1 Germany
5.5.2.2 United Kingdom
5.5.2.3 France
5.5.2.4 Rest of Europe
5.5.3 Asia-Pacific
5.5.3.1 China
5.5.3.2 India
5.5.3.3 Japan
5.5.3.4 Rest of Asia-Pacific
5.5.4 South America
5.5.4.1 Brazil
5.5.4.2 Argentina
5.5.4.3 Rest of South America
5.5.5 Middle East
5.5.5.1 United Arab Emirates
5.5.5.2 Saudi Arabia
5.5.5.3 Rest of Middle East
5.5.6 Africa
5.5.6.1 South Africa
5.5.6.2 Nigeria
5.5.6.3 Rest of Africa

6 COMPETITIVE LANDSCAPE
6.1 Market Concentration
6.2 Strategic Moves

6.3 Market Share Analysis
6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)
6.4.1 Siemens AG
6.4.2 ABB Ltd.
6.4.3 Rockwell Automation Inc.
6.4.4 Schneider Electric SE
6.4.5 Honeywell International Inc.
6.4.6 Emerson Electric Co.
6.4.7 Yokogawa Electric Corporation
6.4.8 Mitsubishi Electric Corporation
6.4.9 Omron Corporation
6.4.10 GE Digital (General Electric Co.)
6.4.11 Bosch Rexroth AG
6.4.12 Phoenix Contact GmbH
6.4.13 Beckhoff Automation GmbH
6.4.14 Hitachi Ltd.
6.4.15 Delta Electronics Inc.
6.4.16 Advantech Co., Ltd.
6.4.17 Johnson Controls International plc
6.4.18 Fortinet Inc. (ICS-cybersecurity)
6.4.19 Palo Alto Networks Inc. (ICS-cybersecurity)
6.4.20 ICS-Secure LLC

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK
7.1 White-space and Unmet-need Assessment

SCOTTS
INTERNATIONAL

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

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.
** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-02
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com