

Industrial Control Systems Security Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Solution, Service), By Security (Network Security, Application Security, Endpoint Security, Database Security), By System (Supervisory Control & Data Acquisition System, Distributed Control System, Programmable Logic Controller, Machine Execution System (MES), Product Lifecycle Management (PLM), Enterprise Resource Planning (ERP), Human Machine Interface (HMI), Others), By End User (Automotive, Chemical & Petrochemical, Oil & Gas, Utilities, Pharmaceutical, Food & Beverage, Others), By Region, and By Competition, 2020-2030F

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Report description:

Market Overview

The Global Industrial Control Systems Security Market, valued at USD 17.51 Billion in 2024, is projected to experience a CAGR of 8.00% to reach USD 27.79 Billion by 2030. Industrial Control Systems (ICS) security encompasses the protective measures safeguarding the operational technology environments crucial for monitoring and controlling physical processes across various industrial sectors. This market's expansion is fundamentally driven by the escalating sophistication and volume of cyber threats targeting critical infrastructure.

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Key Market Drivers

The global Industrial Control Systems security market is significantly shaped by the escalating sophistication and volume of cyber threats directed at critical infrastructure. Industrial and manufacturing sectors are increasingly targeted due to their vital role in global economies and the potential for widespread disruption. These persistent and evolving threats necessitate continuous investment in advanced security solutions to protect operational continuity and national security.

Key Market Challenges

The complexity inherent in integrating modern security solutions with established legacy industrial control systems poses a significant impediment to the expansion of the Global Industrial Control Systems Security Market. Many operational technology environments, particularly in critical infrastructure sectors, feature systems that were implemented decades ago without contemporary cybersecurity protocols. These older systems often utilize proprietary communication protocols and specialized hardware, making them inherently resistant to standard security updates and seamless integration with advanced security platforms designed for current threat landscapes.

Key Market Trends

Advanced analytics and artificial intelligence are profoundly transforming threat detection within industrial control systems security, facilitating more proactive and precise defense. These technologies are crucial for discerning subtle anomalies and complex attack patterns in operational technology environments. The SANS 2024 State of ICS/OT Cybersecurity Survey indicated that 19% of respondents were actively testing AI in lab environments for ICS/OT networks, showcasing early adoption and exploration of AI's potential for industrial defense.

Key Market Players

- IBM Corporation
- Cisco Systems Inc.
- Honeywell International Inc.
- Broadcom Inc.
- Rockwell Automation Inc.
- Palo Alto Networks, Inc.
- BAE Systems plc.
- Raytheon Technologies Corporation
- Trellix Corporation
- Check Point Software Technologies Ltd.

Report Scope:

In this report, the Global Industrial Control Systems Security Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Industrial Control Systems Security Market, By Component:

- o Solution
- o Service

- Industrial Control Systems Security Market, By Security:

- o Network Security
- o Application Security
- o Endpoint Security
- o Database Security

- Industrial Control Systems Security Market, By System:

- o Supervisory Control & Data Acquisition System
- o Distributed Control System
- o Programmable Logic Controller
- o Machine Execution System (MES)
- o Product Lifecycle Management (PLM)
- o Enterprise Resource Planning (ERP)

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- o Human Machine Interface (HMI)

- o Others

-□Industrial Control Systems Security Market, By End User:

- o Automotive

- o Chemical & Petrochemical

- o Oil & Gas

- o Utilities

- o Pharmaceutical

- o Food & Beverage

- o Others

-□Industrial Control Systems Security Market, By Region:

- o North America

- United States

- Canada

- Mexico

- o Europe

- France

- United Kingdom

- Italy

- Germany

- Spain

- o South America

- Brazil

- Argentina

- Colombia

- o Middle East & Africa

- South Africa

- Saudi Arabia

- UAE

- o Asia Pacific

- China

- India

- Japan

- Australia

- South Korea

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Industrial Control Systems Security Market.

Available Customizations:

Global Industrial Control Systems Security Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

-□Detailed analysis and profiling of additional market players (up to five).

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