

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.

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)

- 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).

Table of Contents:

1. Product Overview
- 1.1. Market Definition

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- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations
- 2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validation
 - 2.7. Assumptions and Limitations
- 3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
- 4. Voice of Customer
- 5. Global Industrial Control Systems Security Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Component (Solution, Service)
 - 5.2.2. By Security (Network Security, Application Security, Endpoint Security, Database Security)
 - 5.2.3. 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)
 - 5.2.4. By End User (Automotive, Chemical & Petrochemical, Oil & Gas, Utilities, Pharmaceutical, Food & Beverage, Others)
 - 5.2.5. By Region
 - 5.2.6. By Company (2024)
 - 5.3. Market Map
 - 6. North America Industrial Control Systems Security Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share & Forecast
 - 6.2.1. By Component
 - 6.2.2. By Security
 - 6.2.3. By System
 - 6.2.4. By End User
 - 6.2.5. By Country
 - 6.3. North America: Country Analysis
 - 6.3.1. United States Industrial Control Systems Security Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.1.2. Market Share & Forecast
 - 6.3.1.1.3. By Component

- 6.3.1.2.2. By Security
- 6.3.1.2.3. By System
- 6.3.1.2.4. By End User
- 6.3.2. Canada Industrial Control Systems Security Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Component
 - 6.3.2.2.2. By Security
 - 6.3.2.2.3. By System
 - 6.3.2.2.4. By End User
- 6.3.3. Mexico Industrial Control Systems Security Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Component
 - 6.3.3.2.2. By Security
 - 6.3.3.2.3. By System
 - 6.3.3.2.4. By End User
- 7. Europe Industrial Control Systems Security Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Component
 - 7.2.2. By Security
 - 7.2.3. By System
 - 7.2.4. By End User
 - 7.2.5. By Country
 - 7.3. Europe: Country Analysis
 - 7.3.1. Germany Industrial Control Systems Security Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Component
 - 7.3.1.2.2. By Security
 - 7.3.1.2.3. By System
 - 7.3.1.2.4. By End User
 - 7.3.2. France Industrial Control Systems Security Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Component
 - 7.3.2.2.2. By Security
 - 7.3.2.2.3. By System
 - 7.3.2.2.4. By End User
 - 7.3.3. United Kingdom Industrial Control Systems Security Market Outlook
 - 7.3.3.1. Market Size & Forecast

- 7.3.3.1.1. By Value
- 7.3.3.2. Market Share & Forecast
- 7.3.3.2.1. By Component
- 7.3.3.2.2. By Security
- 7.3.3.2.3. By System
- 7.3.3.2.4. By End User
- 7.3.4. Italy Industrial Control Systems Security Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Component
 - 7.3.4.2.2. By Security
 - 7.3.4.2.3. By System
 - 7.3.4.2.4. By End User
- 7.3.5. Spain Industrial Control Systems Security Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Component
 - 7.3.5.2.2. By Security
 - 7.3.5.2.3. By System
 - 7.3.5.2.4. By End User
- 8. Asia Pacific Industrial Control Systems Security Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Component
 - 8.2.2. By Security
 - 8.2.3. By System
 - 8.2.4. By End User
 - 8.2.5. By Country
 - 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Industrial Control Systems Security Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Component
 - 8.3.1.2.2. By Security
 - 8.3.1.2.3. By System
 - 8.3.1.2.4. By End User
 - 8.3.2. India Industrial Control Systems Security Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Component
 - 8.3.2.2.2. By Security
 - 8.3.2.2.3. By System

- 8.3.2.2.4. By End User
- 8.3.3. Japan Industrial Control Systems Security Market Outlook
- 8.3.3.1. Market Size & Forecast
- 8.3.3.1.1. By Value
- 8.3.3.2. Market Share & Forecast
- 8.3.3.2.1. By Component
- 8.3.3.2.2. By Security
- 8.3.3.2.3. By System
- 8.3.3.2.4. By End User
- 8.3.4. South Korea Industrial Control Systems Security Market Outlook
- 8.3.4.1. Market Size & Forecast
- 8.3.4.1.1. By Value
- 8.3.4.2. Market Share & Forecast
- 8.3.4.2.1. By Component
- 8.3.4.2.2. By Security
- 8.3.4.2.3. By System
- 8.3.4.2.4. By End User
- 8.3.5. Australia Industrial Control Systems Security Market Outlook
- 8.3.5.1. Market Size & Forecast
- 8.3.5.1.1. By Value
- 8.3.5.2. Market Share & Forecast
- 8.3.5.2.1. By Component
- 8.3.5.2.2. By Security
- 8.3.5.2.3. By System
- 8.3.5.2.4. By End User
- 9. Middle East & Africa Industrial Control Systems Security Market Outlook
- 9.1. Market Size & Forecast
- 9.1.1. By Value
- 9.2. Market Share & Forecast
- 9.2.1. By Component
- 9.2.2. By Security
- 9.2.3. By System
- 9.2.4. By End User
- 9.2.5. By Country
- 9.3. Middle East & Africa: Country Analysis
- 9.3.1. Saudi Arabia Industrial Control Systems Security Market Outlook
- 9.3.1.1. Market Size & Forecast
- 9.3.1.1.1. By Value
- 9.3.1.2. Market Share & Forecast
- 9.3.1.2.1. By Component
- 9.3.1.2.2. By Security
- 9.3.1.2.3. By System
- 9.3.1.2.4. By End User
- 9.3.2. UAE Industrial Control Systems Security Market Outlook
- 9.3.2.1. Market Size & Forecast
- 9.3.2.1.1. By Value
- 9.3.2.2. Market Share & Forecast

- 9.3.2.2.1. By Component
- 9.3.2.2.2. By Security
- 9.3.2.2.3. By System
- 9.3.2.2.4. By End User
- 9.3.3. South Africa Industrial Control Systems Security Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Component
 - 9.3.3.2.2. By Security
 - 9.3.3.2.3. By System
 - 9.3.3.2.4. By End User
- 10. South America Industrial Control Systems Security Market Outlook
 - 10.1. Market Size & Forecast
 - 10.1.1. By Value
 - 10.2. Market Share & Forecast
 - 10.2.1. By Component
 - 10.2.2. By Security
 - 10.2.3. By System
 - 10.2.4. By End User
 - 10.2.5. By Country
 - 10.3. South America: Country Analysis
 - 10.3.1. Brazil Industrial Control Systems Security Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Component
 - 10.3.1.2.2. By Security
 - 10.3.1.2.3. By System
 - 10.3.1.2.4. By End User
 - 10.3.2. Colombia Industrial Control Systems Security Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Component
 - 10.3.2.2.2. By Security
 - 10.3.2.2.3. By System
 - 10.3.2.2.4. By End User
 - 10.3.3. Argentina Industrial Control Systems Security Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Component
 - 10.3.3.2.2. By Security
 - 10.3.3.2.3. By System
 - 10.3.3.2.4. By End User
 - 11. Market Dynamics

- 11.1. Drivers
- 11.2. Challenges
- 12. Market Trends & Developments
 - 12.1. Merger & Acquisition (If Any)
 - 12.2. Product Launches (If Any)
 - 12.3. Recent Developments
- 13. Global Industrial Control Systems Security Market: SWOT Analysis
- 14. Porter's Five Forces Analysis
 - 14.1. Competition in the Industry
 - 14.2. Potential of New Entrants
 - 14.3. Power of Suppliers
 - 14.4. Power of Customers
 - 14.5. Threat of Substitute Products
- 15. Competitive Landscape
 - 15.1. IBM Corporation
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. SWOT Analysis
 - 15.2. Cisco Systems Inc.
 - 15.3. Honeywell International Inc.
 - 15.4. Broadcom Inc.
 - 15.5. Rockwell Automation Inc.
 - 15.6. Palo Alto Networks, Inc.
 - 15.7. BAE Systems plc.
 - 15.8. Raytheon Technologies Corporation
 - 15.9. Trellix Corporation
 - 15.10. Check Point Software Technologies Ltd.
- 16. Strategic Recommendations
- 17. About Us & Disclaimer

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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