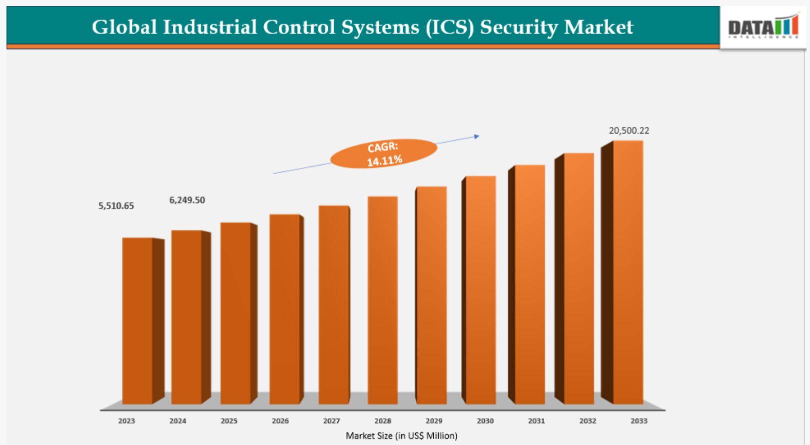
Industrial Control Systems Security (ICS) Industy Technology Size Set for Explosive Growth: $20,500.22B by 2033

Global Industrial Control Systems (ICS) Market Expands Amid Smart Manufacturing and Cybersecurity Mandates



Industrial Control Systems Security (ICS) Industy

AUSTIN, TX, UNITED STATES, September 23, 2025 /EINPresswire.com/ -- Market Size and Growth

The global [industrial control systems (ICS) market](#) reached US$ 5,510.65 million in 2023, with a rise to US$ 6,249.50 million in 2024, and is expected to reach US$ 20,500.22 million by 2033, growing at a CAGR of 14.11% during the forecast period 2025–2033.

> "USA ICS Security Market set for rapid growth: $6,249.50B in 2024 to $20,500.22B by 2033, CAGR 14.11%, driven by digitalization."
>
> *DataM Intelligence 4Market Research LLP*

Market Size & Forecast:

- 2024 Market: US$ 6,249.50 Million
- 2033 Projected Market: US$ 20,500.22 Million
- CAGR (2025–2033): 14.11%
- Fastest-Growing Market: Asia-Pacific in 2024
- Largest Market: North America

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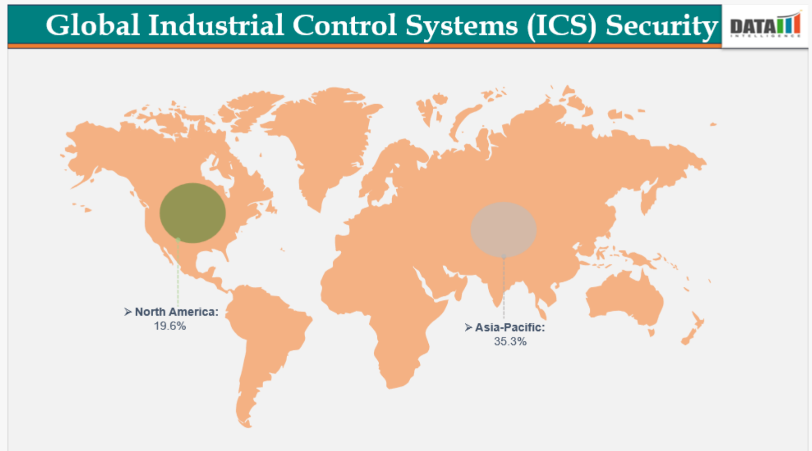
Key Market Trends & Insights:

1. Asia-Pacific leads the ICS market, driven by 70,000+ smart factories in China and 60% ICS

adoption in Japan, establishing the region as a hub for industrial modernization.

2. North America is the fastest-growing market, fueled by US DOE and CISA initiatives integrating ICS in utilities, oil & gas, and critical infrastructure.

3. Rising focus on ICS cybersecurity is reshaping the market, with ENISA reporting in 2024 that 60% of European operators faced supply chain-related ICS risks, prompting stricter compliance and secure ICS adoption.



Global Industrial Control Systems Security (ICS) Industy

Industry Driver:

1. Industry 4.0 adoption accelerates ICS integration, with 50% of German manufacturers using solutions by 2023 (BMWK).

2. China leads smart factory growth with 70,000+ digital workshops integrating ICS by 2024 (MIIT).

3. ICS cyberattacks rose 20% in 2023, affecting energy and water sectors, per US CISA.

4. Over 60% of European industrial operators faced supply chain ICS risks in 2024, reports ENISA

The global industrial control systems (ICS) market is accelerating on the back of Industry 4.0 adoption, grid modernization, and rising cybersecurity mandates. According to Japan's Ministry of Economy, Trade and Industry (METI), over 60% of manufacturing facilities integrated ICS-enabled smart factory systems by 2023, demonstrating the reliance on automation and real-time monitoring. Similarly, China's Ministry of Industry and Information Technology (MIIT) reported over 70,000 digital workshops and smart factories established by 2024, underpinned by ICS deployment.

National governments are mandating secure, resilient automation in critical sectors. The US Department of Energy (DOE) highlighted in its 2024 Grid Modernization Initiative that two-thirds of utilities deployed ICS solutions to strengthen grid stability and resilience. At the same time, the European Union Agency for Cybersecurity (ENISA) introduced mandatory ICS compliance for essential services in 2024, reinforcing the role of ICS platforms in energy, manufacturing, and defense. With initiatives spanning Asia, North America, and Europe, demand for ICS is expanding in tandem with industrial digitalization and stricter cyber-resilience mandates.

Key Players

1. IBM Corporation
2. ABB
3. Cisco Systems, Inc.
4. Check Point Software Technologies Ltd
5. Fortinet, Inc.
6. Honeywell International Inc.
7. AO Kaspersky Lab
8. Microsoft
9. Siemens
10. Nozomi Networks Inc.

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Smart Manufacturing and Cybersecurity as Core Market Drivers

Smart manufacturing and cybersecurity remain the twin forces powering the ICS market. Germany's Federal Ministry for Economic Affairs and Climate Action (BMWK) reported that more than half of German manufacturers had implemented Industry 4.0 solutions by 2023, with ICS forming the backbone of digital production. Meanwhile, ENISA noted that over 60% of European critical infrastructure operators reported ICS supply chain vulnerabilities in 2024, underscoring how regulatory pressure is driving upgrades in system security. These developments illustrate how automation and cybersecurity compliance are converging to accelerate ICS adoption worldwide.

Restraint: Rising Cyber Vulnerabilities and Operational Risks

Despite robust growth, ICS markets face challenges due to rising cybersecurity risks and operational vulnerabilities. The US Cybersecurity and Infrastructure Security Agency (CISA) reported a 20% rise in ICS-targeted incidents in 2023, especially in energy and water sectors, disrupting operations and increasing compliance costs. These recurring threats make investment in advanced cybersecurity frameworks unavoidable, raising the cost and complexity of ICS deployments.

Solutions Segment Leading Global Adoption

The Solutions segment remains the most in-demand, as industries deploy supervisory control and data acquisition (SCADA), distributed control systems (DCS), and programmable logic controllers (PLCs). MIIT noted that China's 70,000+ smart facilities rely primarily on SCADA and

DCS platforms, while DOE-backed US pilot projects integrate ICS solutions into renewable energy systems. Such investments demonstrate that solutions-driven platforms form the core of industrial automation, cybersecurity, and compliance readiness worldwide.

Asia-Pacific's Dominance in the Global Market

Asia-Pacific held a 35.3% share of the ICS market in 2024.

Asia-Pacific accounts for the largest ICS market share, driven by massive factory automation and digitalization programs. China alone is set to exceed 1.5 TWh of energy production managed by ICS-integrated smart grids by 2030, according to MIIT, reinforcing the region's dominance. Japan and South Korea are accelerating ICS adoption through state-backed manufacturing innovation initiatives, further strengthening APAC leadership. Meanwhile, North America is the fastest-growing market, with the US DOE investing heavily in ICS-driven grid modernization, and Canada adopting ICS across oil & gas operations. Europe is emerging as the compliance-driven hub, driven by ENISA and Horizon Europe's industrial digitalization programs.

North America's ICS market

North America held a 19.6% share of the ICS market in 2024.

North America's ICS market is the fastest-growing, driven by cybersecurity and legacy system upgrades. In 2024, over 65% of US utilities adopted ICS under the Grid Modernization Initiative. ICS cyber incidents rose 35% in 2023, accelerating secure platform adoption. Canada invested USD 1.5B in smart industrial automation. Key players include ABB, Cisco, Honeywell, IBM, Siemens, and Nozomi, with Cisco leading in supply chain cybersecurity and federal collaborations.

Market Segmentation

By Security Type: (Endpoint Security, End-User Security, Network Security, Database Security)

By Component: (Solutions, Services)

By End-User: (Automotive and Transportation, IT & Telecom, Energy & Utilities, Healthcare, Manufacturing, Retail and Others)

By Region: (North America, Europe, Asia-Pacific, South America, and the Middle East & Africa)

Conclusion

The global industrial control systems (ICS) market is poised for significant growth, powered by automation, smart manufacturing, and cybersecurity mandates. Governments across APAC, North America, and Europe are mandating industrial modernization and cyber-resilient operations, creating strong demand for ICS hardware, solutions, and services. However, the market must contend with the rising cost of securing multi-tier vendor networks and cyber vulnerabilities. With APAC leading in adoption, North America accelerating under federal investments, and Europe pushing compliance-driven modernization, the ICS market is set for long-term, transformative expansion.

Why Choose This Global Industrial Control Systems (ICS) Market Report?

• Latest Data & Forecasts: In-depth, up-to-date analysis through 2033
• Regulatory Intelligence: Insights on ENISA mandates, DOE grid initiatives, MIIT smart factory programs, and METI adoption benchmarks
• Competitive Benchmarking: Evaluate strategies of ABB, Siemens, Honeywell, Cisco, and Nozomi Networks
• Emerging Market Coverage: Special focus on China, Japan, India, and US federal-backed growth
• Actionable Strategies: Identify opportunities, mitigate risks, and maximize ROI in ICS adoption
• Expert Analysis: Research led by specialists in industrial automation and cybersecurity integration

Empower your business to stay ahead of automation mandates, cybersecurity risks, and compliance-driven disruptions in the Global Industrial Control Systems (ICS) Market. Request your sample or full report today.

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