

# **Global Operational Technology (OT) Security Market Size Study & Forecast, by Component (Solutions and Services [OT Endpoint Security, OT Network Segmentation, Anomaly Detection, Incident Response and Reporting, and Others]), by Deployment Mode (On-Premises, Cloud, Hybrid), by End-Use Industry (Power & Electrical, Manufacturing [Discrete Manufacturing, Process Manufacturing], Mining, Transportation, and Others), and Regional Forecasts 2025–2035**

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## **Abstracts**

The Global Operational Technology (OT) Security Market is valued at approximately USD 20.37 billion in 2024 and is poised to register a promising CAGR of over 20.6% throughout the forecast period from 2025 to 2035. As industrial enterprises embrace digitization, the boundaries between IT and OT networks continue to blur, exposing critical infrastructure to cyber threats. This shift has brought OT security into sharper focus, especially within sectors where uninterrupted operations are mission-critical—such as power generation, transportation, and manufacturing. OT security serves as a shield for control systems like SCADA, DCS, and PLCs that operate physical assets, ensuring their availability, integrity, and confidentiality are never compromised.

The expansion of smart grids, IIoT deployments, and Industry 4.0 initiatives are actively reshaping the threat landscape for operational environments. OT environments are increasingly targeted by sophisticated attacks like ransomware, phishing, and zero-day exploits, putting both public safety and financial assets at risk. This evolving threat profile, combined with a global shortage of OT cybersecurity professionals, has compelled organizations to seek out advanced, automated OT security solutions.

Furthermore, increasing regulatory compliance mandates such as NERC CIP, IEC 62443, and others are pushing critical infrastructure operators to adopt robust OT cyber defense frameworks, thereby driving significant market momentum.

Regionally, North America is expected to dominate the OT security landscape in 2025, supported by widespread digitization across the U.S. manufacturing and energy sectors and a strong emphasis on securing national critical infrastructure. The presence of key OT security vendors, along with active collaboration between public and private sectors to mitigate cyber threats, further elevates the region's market position. Meanwhile, Europe is undergoing a surge in demand for OT security, driven by energy transition policies and the proliferation of smart factory frameworks. However, Asia Pacific is anticipated to emerge as the fastest-growing region, fueled by the expansion of industrial bases in China, India, and Southeast Asia, coupled with accelerated digital transformation initiatives across power, railways, and utilities. As governments and enterprises align on the urgency of safeguarding industrial assets, the APAC market is poised for exponential growth.

Major market player included in this report are:

Schneider Electric SE

IBM Corporation

Honeywell International Inc.

Fortinet, Inc.

ABB Ltd.

Palo Alto Networks, Inc.

Siemens AG

Rockwell Automation, Inc.

Cisco Systems, Inc.

Belden Inc.

Nozomi Networks Inc.

Dragos Inc.

BAE Systems PLC

Check Point Software Technologies Ltd.

Kaspersky Lab

### Global Operational Technology (OT) Security Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast Period – 2025–2035

Report Coverage – Revenue Forecast, Company Ranking, Competitive Landscape, Growth Factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players.

The detailed segments and sub-segments of the market are explained below:

By Component:

Solutions

Services

? OT Endpoint Security

? OT Network Segmentation

? Anomaly Detection

? Incident Response and Reporting

? Others

By Service:

Professional

Managed

? Consulting Services

? Deployment and Implementation Services

By Deployment Mode:

On-Premises

Cloud

Hybrid

By End-Use Industry:

Power and Electrical

Manufacturing

? Discrete Manufacturing

? Process Manufacturing

Mining

Transportation

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

## Contents

### **CHAPTER 1. GLOBAL OPERATIONAL TECHNOLOGY (OT) SECURITY MARKET REPORT SCOPE & METHODOLOGY**

- 1.1. Research Objective
- 1.2. Research Methodology
  - 1.2.1. Forecast Model
  - 1.2.2. Desk Research
  - 1.2.3. Top Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
  - 1.4.1. Market Definition
  - 1.4.2. Market Segmentation
- 1.5. Research Assumption
  - 1.5.1. Inclusion & Exclusion
  - 1.5.2. Limitations
  - 1.5.3. Years Considered for the Study

### **CHAPTER 2. EXECUTIVE SUMMARY**

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. Key Findings

### **CHAPTER 3. GLOBAL OPERATIONAL TECHNOLOGY (OT) SECURITY MARKET FORCES ANALYSIS**

- 3.1. Market Forces Shaping the Global OT Security Market (2024–2035)
- 3.2. Drivers
  - 3.2.1. Increasing Convergence of IT and OT Systems
  - 3.2.2. Growing Incidence of Sophisticated Cyberattacks Targeting Critical Infrastructure
- 3.3. Restraints
  - 3.3.1. High Cost of Implementation and Maintenance of OT Security Solutions
  - 3.3.2. Lack of Skilled Cybersecurity Professionals in Industrial Sectors
- 3.4. Opportunities
  - 3.4.1. Growing Regulatory Mandates for Critical Infrastructure Protection

### 3.4.2. Proliferation of Industrial IoT (IIoT) and Smart Manufacturing Ecosystems

## **CHAPTER 4. GLOBAL OPERATIONAL TECHNOLOGY (OT) SECURITY INDUSTRY ANALYSIS**

- 4.1. Porter's Five Forces Model
  - 4.1.1. Bargaining Power of Buyers
  - 4.1.2. Bargaining Power of Suppliers
  - 4.1.3. Threat of New Entrants
  - 4.1.4. Threat of Substitutes
  - 4.1.5. Competitive Rivalry
- 4.2. Porter's Five Forces Forecast Model (2024–2035)
- 4.3. PESTEL Analysis
  - 4.3.1. Political
  - 4.3.2. Economical
  - 4.3.3. Social
  - 4.3.4. Technological
  - 4.3.5. Environmental
  - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024–2025)
- 4.7. Global Pricing Analysis and Trends (2025)
- 4.8. Analyst Recommendation & Conclusion

## **CHAPTER 5. GLOBAL OT SECURITY MARKET SIZE & FORECASTS BY COMPONENT (2025–2035)**

- 5.1. Market Overview
- 5.2. Solutions
  - 5.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
  - 5.2.2. Market Size Analysis, by Region, 2025–2035
- 5.3. Services
  - 5.3.1. OT Endpoint Security
  - 5.3.2. OT Network Segmentation
  - 5.3.3. Anomaly Detection
  - 5.3.4. Incident Response and Reporting
  - 5.3.5. Others
  - 5.3.6. Top Countries Breakdown Estimates & Forecasts, 2024–2035

5.3.7. Market Size Analysis, by Region, 2025–2035

## **CHAPTER 6. GLOBAL OT SECURITY MARKET SIZE & FORECASTS BY SERVICE (2025–2035)**

6.1. Market Overview

6.2. Professional Services

6.2.1. Consulting Services

6.2.2. Deployment and Implementation Services

6.2.3. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.2.4. Market Size Analysis, by Region, 2025–2035

6.3. Managed Services

6.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.3.2. Market Size Analysis, by Region, 2025–2035

## **CHAPTER 7. GLOBAL OT SECURITY MARKET SIZE & FORECASTS BY DEPLOYMENT MODE (2025–2035)**

7.1. Market Overview

7.2. On-Premises

7.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.2.2. Market Size Analysis, by Region, 2025–2035

7.3. Cloud

7.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.3.2. Market Size Analysis, by Region, 2025–2035

7.4. Hybrid

7.4.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.4.2. Market Size Analysis, by Region, 2025–2035

## **CHAPTER 8. GLOBAL OT SECURITY MARKET SIZE & FORECASTS BY END-USE INDUSTRY (2025–2035)**

8.1. Market Overview

8.2. Power and Electrical

8.3. Manufacturing

8.3.1. Discrete Manufacturing

8.3.2. Process Manufacturing

8.4. Mining

8.5. Transportation

## 8.6. Others

8.6.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

8.6.2. Market Size Analysis, by Region, 2025–2035

## **CHAPTER 9. GLOBAL OT SECURITY MARKET SIZE & FORECASTS BY REGION (2025–2035)**

9.1. Global Market Snapshot

9.2. Top Leading & Emerging Countries

9.3. North America

9.3.1. U.S.

9.3.2. Canada

9.4. Europe

9.4.1. UK

9.4.2. Germany

9.4.3. France

9.4.4. Spain

9.4.5. Italy

9.4.6. Rest of Europe

9.5. Asia Pacific

9.5.1. China

9.5.2. India

9.5.3. Japan

9.5.4. Australia

9.5.5. South Korea

9.5.6. Rest of Asia Pacific

9.6. Latin America

9.6.1. Brazil

9.6.2. Mexico

9.7. Middle East & Africa

9.7.1. UAE

9.7.2. Saudi Arabia

9.7.3. South Africa

9.7.4. Rest of Middle East & Africa

## **CHAPTER 10. COMPETITIVE INTELLIGENCE**

10.1. Top Market Strategies

10.2. Schneider Electric SE

- 10.2.1. Company Overview
- 10.2.2. Key Executives
- 10.2.3. Company Snapshot
- 10.2.4. Financial Performance (Subject to Data Availability)
- 10.2.5. Product/Services Port
- 10.2.6. Recent Development
- 10.2.7. Market Strategies
- 10.2.8. SWOT Analysis
- 10.3. IBM Corporation
- 10.4. Honeywell International Inc.
- 10.5. Fortinet, Inc.
- 10.6. ABB Ltd.
- 10.7. Palo Alto Networks, Inc.
- 10.8. Siemens AG
- 10.9. Rockwell Automation, Inc.
- 10.10. Cisco Systems, Inc.
- 10.11. Belden Inc.
- 10.12. Nozomi Networks Inc.
- 10.13. Dragos Inc.
- 10.14. BAE Systems PLC
- 10.15. Check Point Software Technologies Ltd.
- 10.16. Kaspersky Lab

## List Of Tables

### LIST OF TABLES

- Table 1. Global OT Security Market, Report Scope
- Table 2. Global OT Security Market Estimates & Forecasts by Region 2024–2035
- Table 3. Global OT Security Market Estimates & Forecasts by Component 2024–2035
- Table 4. Global OT Security Market Estimates & Forecasts by Service 2024–2035
- Table 5. Global OT Security Market Estimates & Forecasts by Deployment Mode 2024–2035
- Table 6. Global OT Security Market Estimates & Forecasts by End-Use Industry 2024–2035
- Table 7. U.S. OT Security Market Estimates & Forecasts, 2024–2035
- Table 8. Canada OT Security Market Estimates & Forecasts, 2024–2035
- Table 9. UK OT Security Market Estimates & Forecasts, 2024–2035
- Table 10. Germany OT Security Market Estimates & Forecasts, 2024–2035
- Table 11. France OT Security Market Estimates & Forecasts, 2024–2035
- Table 12. Spain OT Security Market Estimates & Forecasts, 2024–2035
- Table 13. Italy OT Security Market Estimates & Forecasts, 2024–2035
- Table 14. Rest of Europe OT Security Market Estimates & Forecasts, 2024–2035
- Table 15. China OT Security Market Estimates & Forecasts, 2024–2035
- Table 16. India OT Security Market Estimates & Forecasts, 2024–2035
- Table 17. Japan OT Security Market Estimates & Forecasts, 2024–2035
- Table 18. Australia OT Security Market Estimates & Forecasts, 2024–2035
- Table 19. South Korea OT Security Market Estimates & Forecasts, 2024–2035
- Table 20. Rest of Asia Pacific OT Security Market Estimates & Forecasts, 2024–2035
- Table 21. Brazil OT Security Market Estimates & Forecasts, 2024–2035
- Table 22. Mexico OT Security Market Estimates & Forecasts, 2024–2035
- Table 23. UAE OT Security Market Estimates & Forecasts, 2024–2035
- Table 24. Saudi Arabia OT Security Market Estimates & Forecasts, 2024–2035
- Table 25. South Africa OT Security Market Estimates & Forecasts, 2024–2035
- Table 26. Rest of Middle East & Africa OT Security Market Estimates & Forecasts, 2024–2035

## List Of Figures

### LIST OF FIGURES

- Fig 1. Global OT Security Market, Research Methodology
- Fig 2. Global OT Security Market, Market Estimation Techniques
- Fig 3. Global Market Size Estimates & Forecast Methods
- Fig 4. Global OT Security Market, Key Trends 2025
- Fig 5. Global OT Security Market, Growth Prospects 2024–2035
- Fig 6. Global OT Security Market, Porter's Five Forces Model
- Fig 7. Global OT Security Market, PESTEL Analysis
- Fig 8. Global OT Security Market, Value Chain Analysis
- Fig 9. OT Security Market by Component, 2025 & 2035
- Fig 10. OT Security Market by Service, 2025 & 2035
- Fig 11. OT Security Market by Deployment Mode, 2025 & 2035
- Fig 12. OT Security Market by End-Use Industry, 2025 & 2035
- Fig 13. OT Security Market by Region, 2025 & 2035
- Fig 14. North America OT Security Market, 2025 & 2035
- Fig 15. Europe OT Security Market, 2025 & 2035
- Fig 16. Asia Pacific OT Security Market, 2025 & 2035
- Fig 17. Latin America OT Security Market, 2025 & 2035
- Fig 18. Middle East & Africa OT Security Market, 2025 & 2035
- Fig 19. Global OT Security Market, Company Market Share Analysis (2025)

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