

# **Industrial Control Systems Security Market by Component (Solutions, Services), Solution (Antimalware/Antivirus, DDoS Mitigation), Service (Incident Response Services, Consulting & Integration), Security Type, Vertical, and Region - Global Forecast to 2028**

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## **Abstracts**

The global ICS security market size is projected to grow from USD 17.8 billion in 2023 to USD 25.1 billion by 2028 at a Compound Annual Growth Rate (CAGR) of 7.1% during the forecast period. The ICS security market is propelled by key factors shaping its growth trajectory. These include integrating IT and OT systems, driving expansion in ICS security solutions, and confluence of digital technologies and industrial systems integration.

“By vertical, energy and utilities hold the largest market size.”

Renewable energy power plants have had significant market expansion over the last 20 years because of their renewability, pollution-free nature, large resource amplitude, and generally safe features. An estimated 20% of wind power facilities are expected to increase in the next years. Additionally, it's projected that renewable energy sources account for 15–16% of the world's electricity. Due to their wide dispersion, these sources need all-encompassing solutions for operations management and monitoring. The increasing digitization and interconnectivity of critical infrastructure have exposed energy and utility systems to a heightened risk of cyber threats, propelling a surge in demand for robust ICS security solutions. Adopting smart grids, IoT-enabled devices, and cloud-based solutions has expanded the attack surface, necessitating specialized security solutions tailored for these industrial environments.

“By services, the Consulting and integration segment holds the largest market size.”

Consulting and integration services play a pivotal role in guiding organizations through the complex landscape of ICS security, offering tailored strategies to fortify critical infrastructure against cyber threats. As industries increasingly digitize their operations, there's a growing realization of the need for specialized expertise to assess vulnerabilities, design comprehensive security frameworks, and integrate sophisticated solutions into existing infrastructure seamlessly. The demand for these services is propelled by a surge in cyber threats targeting ICS environments, urging businesses to seek proactive measures and specialized knowledge to safeguard their operational technology networks. Consulting firms and integrators are stepping in to fill this gap, offering expertise in risk assessment, compliance adherence, architecture design, and implementation of robust security protocols.

“By region, North America holds the largest market size.”

North America has been at the forefront of implementing ICS security solutions. ICS security solutions are widely employed in various industries, including manufacturing, chemicals, energy, and utilities, in light of the increasing cyberattacks on critical infrastructure. Additionally, this region has shown remarkable adaptability to the most recent technological developments, including the incorporation of cloud and IoT security solutions with ICS security solutions to create a comprehensive secure access mechanism and implement a security governance structure. The North American area holds a considerable market share, which may be gained through innovative technologies, especially given the rising awareness of ICS security among small and medium-sized firms and the extensive use of data-driven approaches in industrial processes. Effective ICS security and resilience have been achieved in the region due to public-private partnerships (PPP) and international cooperation.

#### Breakdown of primaries

The break-up of the primaries is as follows:

By Company Type: Tier 1 – 25%, Tier 2 – 40%, and Tier 3 – 35%

By Designation: Director- 30%, C-level Executives– 35%, Other levels– 35%

By Region: North America – 15%, Europe – 25%, Asia Pacific – 30%, Middle

East & Africa – 10%, Latin America – 20%

Major vendors in the global ICS security market include Cisco (US), ABB (Switzerland), Lockheed Martin (US), Fortinet (US), Honeywell (US), Palo Alto Networks (US), BAE Systems (UK), RTX (US), Trellicx (US). The study includes an in-depth competitive analysis of the key players in the ICS security market, their company profiles, recent developments, and key market strategies.

### Research Coverage

The report segments the ICS security market and forecasts its size by Component (Solution, Services), by Solutions (Anti-malware/Anti-virus, DDoS, Encryption, Firewall, IAM, IDS/IPS, Security, and Vulnerability Management, Security Configuration Management, SIEM, Whitelisting, Others), by Services (Consulting and Integration, Support and Maintenance, Training and Development, Incident Response Services, Managed Security Services), by Security Type (Network Security, Endpoint Security, Application Security, Database Security), by Vertical (Power, Energy and Utilities, Transportation Systems, Manufacturing, Others), and region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

### Key Benefits of Buying the Report

The report will help the market leaders/new entrants in the market with information on the closest approximations of the revenue numbers for the overall ICS security market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Confluence of digital technologies and industrial systems integration, Government initiatives and regulations in critical

infrastructure protection drive adoption of ICS security solutions, Integration of IT and OT systems driving expansion in ICS security solutions), restraints (Elevated acquisition expenses for ICS security solutions, Navigating challenges in upgrading and maintaining ICS security solutions), opportunities (Escalating demand for professional and managed security services in small and medium-sized enterprises (SMEs), Government and Enterprises R& D investments for robust advancements in ICS security solutions) and challenges (Shortage of skilled analysts for analyzing critical ICT systems, Limited awareness about ICS security techniques)

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the ICS security market.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the ICS security market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the ICS security market.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players like Cisco (US), ABB (Switzerland), Lockheed Martin (US), Fortinet (US), Honeywell (US), Palo Alto Networks (US), BAE Systems (UK), RTX (US), Trellix (US) and among others in the ICS security market strategies.

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

##### 1.2.1 INCLUSIONS AND EXCLUSIONS

#### 1.3 STUDY SCOPE

##### 1.3.1 MARKET SEGMENTATION

##### 1.3.2 REGIONS COVERED

#### 1.4 YEARS CONSIDERED

#### 1.5 CURRENCY CONSIDERED

#### TABLE 1 USD EXCHANGE RATES, 2018–2022

#### 1.6 STAKEHOLDERS

#### 1.7 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

#### FIGURE 1 ICS SECURITY MARKET: RESEARCH DESIGN

##### 2.1.1 SECONDARY DATA

##### 2.1.2 PRIMARY DATA

##### 2.1.2.1 Breakdown of primary profiles

#### FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

##### 2.1.2.2 Key insights from industry experts

#### 2.2 DATA TRIANGULATION

#### FIGURE 3 ICS SECURITY MARKET: DATA TRIANGULATION

#### 2.3 MARKET SIZE ESTIMATION

#### FIGURE 4 ICS SECURITY MARKET ESTIMATION: RESEARCH FLOW

##### 2.3.1 REVENUE ESTIMATES

#### FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 1

##### 2.3.2 TOP-DOWN APPROACH

##### 2.3.3 DEMAND-SIDE ANALYSIS

#### FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 2 (BOTTOM-UP)

#### 2.4 MARKET FORECAST

#### TABLE 2 FACTOR ANALYSIS

#### 2.5 RECESSION IMPACT

## 2.6 RESEARCH ASSUMPTIONS

## 2.7 LIMITATIONS AND RISK ASSESSMENT

# 3 EXECUTIVE SUMMARY

TABLE 3 ICS SECURITY MARKET SIZE AND GROWTH RATE, 2017–2022 (USD MILLION, Y-O-Y %)

TABLE 4 ICS SECURITY MARKET SIZE AND GROWTH RATE, 2023–2028 (USD MILLION, Y-O-Y %)

FIGURE 7 ICS SECURITY MARKET SEGMENTS WITH SIGNIFICANT GROWTH RATE

FIGURE 8 NORTH AMERICA TO ACCOUNT FOR LARGEST SHARE IN 2023

# 4 PREMIUM INSIGHTS

## 4.1 OPPORTUNITIES FOR PLAYERS IN ICS SECURITY MARKET

FIGURE 9 GROWING INSTANCES OF CYBER ATTACKS ON CRITICAL INFRASTRUCTURE AND STRINGENT REGULATIONS TO DRIVE ICS SECURITY MARKET

## 4.2 ICS SECURITY MARKET, BY COMPONENT

FIGURE 10 SOLUTIONS SEGMENT TO ACCOUNT FOR LARGER SHARE DURING FORECAST PERIOD

## 4.3 ICS SECURITY MARKET, BY SOLUTION

FIGURE 11 FIREWALL SEGMENT TO ACCOUNT FOR LARGEST MARKET BY 2028

## 4.4 ICS SECURITY MARKET, BY SERVICE

FIGURE 12 CONSULTING & INTEGRATION SERVICES SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

## 4.5 ICS SECURITY MARKET, BY SECURITY TYPE

FIGURE 13 NETWORK SECURITY SEGMENT TO ACHIEVE HIGHEST GROWTH DURING FORECAST PERIOD

## 4.6 ICS SECURITY MARKET: BY KEY VERTICAL AND REGION

FIGURE 14 ENERGY & UTILITIES SEGMENT AND NORTH AMERICA TO ACCOUNT FOR SIGNIFICANT SHARE IN 2023

## 4.7 MARKET INVESTMENT SCENARIO

FIGURE 15 ASIA PACIFIC TO EMERGE AS LUCRATIVE MARKET FOR INVESTMENTS IN NEXT 5 YEARS

# 5 MARKET OVERVIEW AND INDUSTRY TRENDS

## 5.1 INTRODUCTION

### FIGURE 16 ICS SECURITY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

## 5.2 MARKET DYNAMICS

### 5.2.1 DRIVERS

5.2.1.1 Confluence of digital technologies and industrial system integration

5.2.1.2 Government initiatives and regulations in critical infrastructure protection

5.2.1.3 Integration of IT and OT systems

### 5.2.2 RESTRAINTS

5.2.2.1 Elevated acquisition expenses for ICS security solutions

5.2.2.2 Challenges in upgrading and maintaining ICS security solutions

### 5.2.3 OPPORTUNITIES

5.2.3.1 Escalating demand for professional and managed security services in small and medium-sized enterprises

5.2.3.2 Government R&D investment initiatives for robust advancements in ICS security solutions

### 5.2.4 CHALLENGES

5.2.4.1 Shortage of analysts

5.2.4.2 Limited awareness about ICS security techniques

## 5.3 USE CASES

5.3.1 USE CASE 1: PALO ALTO NETWORKS HELPED WARREN ROGERS ASSOCIATES WITH ICS SECURITY

5.3.2 USE CASE 2: CAPULA HELPED MAJOR POWER PROVIDER IMPROVE EXISTING ROBUST CYBER SECURITY PROGRAM

5.3.3 USE CASE 3: MULTINATIONAL GAS AND ELECTRICAL DISTRIBUTION COMPANY DEPLOYED INDUSTRIAL DEFENDER CENTRAL MANAGER TO MONITOR ITS CRITICAL ASSETS

5.3.4 USE CASE 4: NOZOMI NETWORKS HELPED VERMONT ELECTRIC COOPERATIVE ENHANCE CYBERSECURITY AND OPERATIONAL EFFICIENCY

## 5.4 VALUE CHAIN ANALYSIS

### FIGURE 17 VALUE CHAIN ANALYSIS

## 5.5 ECOSYSTEM ANALYSIS

### FIGURE 18 ECOSYSTEM MAP

### TABLE 5 ROLE OF PLAYERS IN MARKET ECOSYSTEM

## 5.6 PORTER'S FIVE FORCES ANALYSIS

### FIGURE 19 PORTER'S FIVE FORCES ANALYSIS

### TABLE 6 IMPACT OF PORTER'S FIVE FORCES ON ICS SECURITY MARKET

5.6.1 THREAT OF NEW ENTRANTS

5.6.2 THREAT OF SUBSTITUTES



### 5.6.3 BARGAINING POWER OF SUPPLIERS

### 5.6.4 BARGAINING POWER OF BUYERS

### 5.6.5 INTENSITY OF COMPETITIVE RIVALRY

## 5.7 PRICING ANALYSIS

### 5.7.1 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY SOLUTION TYPE

FIGURE 20 AVERAGE SELLING PRICE TREND OF KEY PLAYERS FOR TOP 3 SOLUTION TYPES

TABLE 7 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY SOLUTION TYPE

### 5.7.2 INDICATIVE PRICING ANALYSIS

TABLE 8 INDICATIVE PRICING ANALYSIS, BY ICS SECURITY VENDOR

## 5.8 TECHNOLOGY ANALYSIS

### 5.8.1 ARTIFICIAL INTELLIGENCE (AI) AND MACHINE LEARNING (ML)

### 5.8.2 IOT

### 5.8.3 CLOUD-BASED SECURITY

### 5.8.4 ZERO TRUST ARCHITECTURE

### 5.8.5 BLOCKCHAIN

## 5.9 PATENT ANALYSIS

FIGURE 21 NUMBER OF PATENTS GRANTED FOR ICS SECURITY MARKET, 2013–2023

FIGURE 22 REGIONAL ANALYSIS OF PATENTS GRANTED FOR ICS SECURITY MARKET

TABLE 9 LIST OF TOP PATENTS IN ICS SECURITY MARKET, 2023

## 5.10 TRADE ANALYSIS

TABLE 10 IMPORT DATA, BY COUNTRY, 2018–2022 (USD BILLION)

FIGURE 23 IMPORT DATA, BY KEY COUNTRY, 2018–2022 (USD BILLION)

TABLE 11 EXPORT DATA, BY COUNTRY, 2018–2022 (USD BILLION)

FIGURE 24 EXPORT DATA, BY KEY COUNTRY, 2018–2022 (USD BILLION)

## 5.11 TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 25 ICS SECURITY MARKET: TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

## 5.12 TARIFF AND REGULATORY LANDSCAPE

### 5.12.1 TARIFF RELATED TO ICS SECURITY SOLUTIONS

TABLE 12 TARIFF RELATED TO ICS SECURITY SOLUTIONS, 2022

### 5.12.2 REGULATORY LANDSCAPE

#### 5.12.2.1 Regulatory bodies, government agencies, and other organizations

TABLE 13 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND



## OTHER ORGANIZATIONS

TABLE 15 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 MIDDLE EAST & AFRICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 17 LATIN AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

### 5.12.3 REGULATIONS

5.12.3.1 General data protection regulation (GDPR)

5.12.3.2 Sarbanes-oxley (SOX) act

5.12.3.3 SOC 2

5.12.3.4 ISO 27001

### 5.13 KEY STAKEHOLDERS AND BUYING CRITERIA

5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 26 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE VERTICALS

TABLE 18 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE VERTICALS

5.13.2 BUYING CRITERIA

FIGURE 27 KEY BUYING CRITERIA FOR TOP THREE VERTICALS

TABLE 19 KEY BUYING CRITERIA FOR TOP THREE VERTICALS

### 5.14 KEY CONFERENCES AND EVENTS

TABLE 20 ICS SECURITY MARKET: LIST OF CONFERENCES AND EVENTS, 2022–2023

## 6 ICS SECURITY MARKET, BY COMPONENT

### 6.1 INTRODUCTION

FIGURE 28 SERVICES SEGMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD

6.1.1 COMPONENTS: ICS SECURITY MARKET DRIVERS

TABLE 21 ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 22 ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

### 6.2 SOLUTIONS

6.2.1 FOCUS ON PROTECTING INDUSTRIAL CONTROL SYSTEMS FROM ATTACKS TO DRIVE MARKET

TABLE 23 SOLUTIONS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 24 SOLUTIONS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD

MILLION)

## 6.3 SERVICES

6.3.1 NEED FOR INTEGRATING AND MANAGING SOLUTIONS ACROSS  
BUSINESS OPERATIONS TO SPUR GROWTH

TABLE 25 SERVICES: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD  
MILLION)

TABLE 26 SERVICES: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD  
MILLION)

## 7 ICS SECURITY MARKET, BY SOLUTION

### 7.1 INTRODUCTION

FIGURE 29 ENCRYPTION SEGMENT TO GROW AT HIGHEST RATE DURING  
FORECAST PERIOD

#### 7.1.1 SOLUTIONS: ICS SECURITY MARKET DRIVERS

TABLE 27 ICS SECURITY MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 28 ICS SECURITY MARKET, BY SOLUTION, 2023–2028 (USD MILLION)

### 7.2 ANTIMALWARE/ANTIVIRUS

7.2.1 ANTIMALWARE AND ANTIVIRUS SOFTWARE SOLUTIONS SAFEGUARD  
INDUSTRIAL CONTROL SYSTEMS AGAINST EXTERNAL THREATS

TABLE 29 ANTIMALWARE/ANTIVIRUS: ICS SECURITY MARKET, BY REGION,  
2017–2022 (USD MILLION)

TABLE 30 ANTIMALWARE/ANTIVIRUS: ICS SECURITY MARKET, BY REGION,  
2023–2028 (USD MILLION)

### 7.3 DDOS MITIGATION

7.3.1 RISE IN IOT-FOCUSED DDOS THREATS, INCREASING SOPHISTICATION  
OF ATTACKS, AND HIGHLY REGULATED INDUSTRY VERTICALS TO BOOST  
GROWTH

TABLE 31 DDOS MITIGATION: ICS SECURITY MARKET, BY REGION, 2017–2022  
(USD MILLION)

TABLE 32 DDOS MITIGATION: ICS SECURITY MARKET, BY REGION, 2023–2028  
(USD MILLION)

### 7.4 ENCRYPTION

7.4.1 ENCRYPTION SOFTWARE PROVIDES COMPREHENSIVE WAY TO  
MITIGATE RISKS OF ACCIDENTAL AND INTENTIONAL DATA BREACHES

TABLE 33 ENCRYPTION: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD  
MILLION)

TABLE 34 ENCRYPTION: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD  
MILLION)

## 7.5 FIREWALL

### 7.5.1 RISING NEED TO MAINTAIN ICS NETWORK INTEGRITY TO DRIVE USE OF FIREWALLS

TABLE 35 FIREWALL: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 36 FIREWALL: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

## 7.6 IDENTITY & ACCESS MANAGEMENT

### 7.6.1 IDENTITY & ACCESS MANAGEMENT SOLUTIONS PROVIDE ROBUST FRAMEWORK FOR ENFORCING SECURITY POLICIES AND MULTI-FACTOR AUTHENTICATION MECHANISMS

TABLE 37 IDENTITY & ACCESS MANAGEMENT: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 38 IDENTITY & ACCESS MANAGEMENT: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

## 7.7 INTRUSION DETECTION & PREVENTION SYSTEM

### 7.7.1 INTRUSION DETECTION & PREVENTION SYSTEM SECURES ORGANIZATIONS' BUSINESS-CRITICAL INFRASTRUCTURE FROM ADVANCED CYBERATTACKS

TABLE 39 INTRUSION DETECTION & PREVENTION SYSTEM: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 40 INTRUSION DETECTION & PREVENTION SYSTEM: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

## 7.8 SECURITY & VULNERABILITY MANAGEMENT

### 7.8.1 INCREASING COMPLEXITY AND INTERCONNECTIVITY OF INDUSTRIAL ENVIRONMENTS TO BOOST ADOPTION OF SECURITY & VULNERABILITY MANAGEMENT SOLUTIONS

TABLE 41 SECURITY & VULNERABILITY MANAGEMENT: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 42 SECURITY & VULNERABILITY MANAGEMENT: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

FIGURE 30 MATURITY AND EVOLUTION OF VULNERABILITY MANAGEMENT: REACTIVE TO PROACTIVE APPROACH

## 7.9 SECURITY CONFIGURATION MANAGEMENT

### 7.9.1 SECURITY CONFIGURATION MANAGEMENT TO PLAY VITAL ROLE IN INTEGRATING IT AND OT SECURITY AND CONFIGURATION

TABLE 43 SECURITY CONFIGURATION MANAGEMENT: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 44 SECURITY CONFIGURATION MANAGEMENT: ICS SECURITY MARKET,

BY REGION, 2023–2028 (USD MILLION)

#### 7.10 SECURITY INFORMATION & EVENT MANAGEMENT

7.10.1 DEMAND FOR SYSTEM THAT CONSOLIDATES, ANALYZES, AND COMPLIES WITH EVENT DATA TO DRIVE MARKET

TABLE 45 EVENT LOGS AND DESCRIPTIONS

TABLE 46 SECURITY INFORMATION & EVENT MANAGEMENT: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 47 SECURITY INFORMATION & EVENT MANAGEMENT: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 7.11 WHITELISTING

7.11.1 WHITELISTING TO MITIGATE TECHNOLOGY INTEROPERABILITY ISSUES AND DEPLOY MOST RELIABLE SOLUTIONS IN ICS SECURITY

TABLE 48 WHITELISTING: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 49 WHITELISTING: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 7.12 OTHER SOLUTIONS

TABLE 50 OTHER SOLUTIONS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 51 OTHER SOLUTIONS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 8 ICS SECURITY MARKET, BY SERVICE

#### 8.1 INTRODUCTION

FIGURE 31 CONSULTING & INTEGRATION SERVICES SEGMENT TO ACCOUNT FOR LARGEST MARKET BY 2028

##### 8.1.1 SERVICES: ICS SECURITY MARKET DRIVERS

TABLE 52 ICS SECURITY MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 53 ICS SECURITY MARKET, BY SERVICE, 2023–2028 (USD MILLION)

#### 8.2 CONSULTING & INTEGRATION SERVICES

8.2.1 SHORTAGE OF SECURITY SKILLS AMONG INTERNAL SECURITY PROFESSIONALS TO DRIVE DEMAND FOR CONSULTING AND INTEGRATING SERVICES

TABLE 54 CONSULTING & INTEGRATION SERVICES: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 55 CONSULTING & INTEGRATION SERVICES: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 8.3 SUPPORT & MAINTENANCE SERVICES

### 8.3.1 ADOPTION OF COMPLEX SECURITY SOLUTIONS TO DRIVE DEMAND FOR SUPPORT & MAINTENANCE SERVICES

TABLE 56 SUPPORT & MAINTENANCE SERVICES: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 57 SUPPORT & MAINTENANCE SERVICES: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 8.4 TRAINING & DEVELOPMENT SERVICES

#### 8.4.1 INNOVATIVE TRAINING & DEVELOPMENT PROGRAMS TO MITIGATE KNOWLEDGE GAPS IN ICS SECURITY SOLUTIONS

TABLE 58 TRAINING & DEVELOPMENT SERVICES: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 59 TRAINING & DEVELOPMENT SERVICES: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 8.5 INCIDENT RESPONSE SERVICES

#### 8.5.1 INCIDENT RESPONSE SERVICES HELP IDENTIFY, HALT, AND LIMIT ATTACKS ON ICS SECURITY SYSTEMS

TABLE 60 INCIDENT RESPONSE SERVICES: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 61 INCIDENT RESPONSE SERVICES: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 8.6 MANAGED SECURITY SERVICES

#### 8.6.1 MANAGED SECURITY SERVICES ALLOW ORGANIZATIONS TO SPEND MORE TIME TO FOCUS ON BUSINESSES

TABLE 62 MANAGED SECURITY SERVICES: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 63 MANAGED SECURITY SERVICES: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

## 9 ICS SECURITY MARKET, BY SECURITY TYPE

### 9.1 INTRODUCTION

FIGURE 32 ENDPOINT SECURITY SEGMENT TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD

#### 9.1.1 SECURITY TYPES: ICS SECURITY MARKET DRIVERS

TABLE 64 ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 65 ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

### 9.2 NETWORK SECURITY

### 9.2.1 NETWORK SECURITY SAFEGUARDS NETWORKS FROM ADVANCED THREATS

TABLE 66 NETWORK SECURITY: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 67 NETWORK SECURITY: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 9.3 ENDPOINT SECURITY

9.3.1 ENDPOINT SECURITY TO SERVE AS DOORWAY FOR CYBERCRIMINALS TO GAIN ACCESS TO ICS NETWORKS

TABLE 68 ENDPOINT SECURITY: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 69 ENDPOINT SECURITY: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 9.4 APPLICATION SECURITY

9.4.1 FOCUS ON IDENTIFYING AND ADDRESSING SECURITY GAPS IN WEB AND MOBILE APPLICATIONS TO BOOST GROWTH

TABLE 70 APPLICATION SECURITY: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 71 APPLICATION SECURITY: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 9.5 DATABASE SECURITY

9.5.1 STRINGENT GOVERNMENT REGULATIONS FOR DATABASE PROTECTION TO BOOST MARKET

TABLE 72 DATABASE SECURITY: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 73 DATABASE SECURITY: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

## 10 ICS SECURITY MARKET, BY VERTICAL

### 10.1 INTRODUCTION

FIGURE 33 ENERGY & UTILITIES SEGMENT TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD

#### 10.1.1 VERTICALS: ICS SECURITY MARKET DRIVERS

TABLE 74 ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 75 ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

### 10.2 POWER

10.2.1 CHALLENGES CONCERNING AGING GRID INFRASTRUCTURES TO DRIVE ADOPTION OF ICS SECURITY SYSTEMS IN POWER SECTOR



TABLE 76 ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 77 ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 78 POWER: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 79 POWER: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.2.2 NUCLEAR POWER PLANTS

TABLE 80 NUCLEAR POWER PLANTS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 81 NUCLEAR POWER PLANTS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.2.3 THERMAL AND HYDROPOWER PLANTS

TABLE 82 THERMAL AND HYDROPOWER PLANTS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 83 THERMAL AND HYDROPOWER PLANTS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.2.4 RENEWABLE ENERGY POWER PLANTS

TABLE 84 RENEWABLE ENERGY POWER PLANTS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 85 RENEWABLE ENERGY POWER PLANTS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.2.5 POWER GRID

TABLE 86 POWER GRID: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 87 POWER GRID: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 10.3 ENERGY & UTILITIES

10.3.1 INCREASED GOVERNMENT FOCUS ON CYBERSECURITY AMONG ENERGY AND UTILITY ORGANIZATIONS TO DRIVE MARKET

TABLE 88 ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 89 ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 90 ENERGY & UTILITIES: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 91 ENERGY & UTILITIES: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)



### 10.3.2 OIL & GAS

TABLE 92 OIL & GAS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 93 OIL & GAS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 10.3.3 ELECTRIC POWER TRANSMISSION

TABLE 94 ELECTRIC POWER TRANSMISSION: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 95 ELECTRIC POWER TRANSMISSION: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 10.3.4 WATER TREATMENT & DISTRIBUTION

TABLE 96 WATER TREATMENT & DISTRIBUTION: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 97 WATER TREATMENT & DISTRIBUTION: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 10.3.5 WASTEWATER COLLECTION & TREATMENT

TABLE 98 WASTEWATER COLLECTION & TREATMENT: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 99 WASTEWATER COLLECTION & TREATMENT: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

## 10.4 TRANSPORTATION

10.4.1 RISING COMPLEXITY IN HANDLING TRANSPORTATION SYSTEMS TO BOOST MARKET FOR ICS SECURITY SYSTEMS

TABLE 100 ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 101 ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 102 TRANSPORTATION: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 103 TRANSPORTATION: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 10.4.2 AIRPORTS

TABLE 104 AIRPORTS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 105 AIRPORTS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 10.4.3 SEAPORTS

TABLE 106 SEAPORTS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 107 SEAPORTS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.4.4 RAILWAYS

TABLE 108 RAILWAYS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 109 RAILWAYS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.4.5 OTHER TRANSPORTATION APPLICATIONS

TABLE 110 OTHER TRANSPORTATION APPLICATIONS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 111 OTHER TRANSPORTATION APPLICATIONS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 10.5 MANUFACTURING

10.5.1 RISING ATTACKS ON MANUFACTURING SECTOR TO SPUR DEMAND FOR ICS SECURITY SYSTEMS

TABLE 112 ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 113 ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 114 MANUFACTURING: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 115 MANUFACTURING: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.5.2 CHEMICAL & MATERIALS

TABLE 116 CHEMICAL & MATERIALS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 117 CHEMICAL & MATERIALS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.5.3 AUTOMOTIVE

TABLE 118 AUTOMOTIVE: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 119 AUTOMOTIVE: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.5.4 MINING UNITS

TABLE 120 MINING UNITS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 121 MINING UNITS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.5.5 PAPER & PULP

TABLE 122 PAPER & PULP: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 123 PAPER & PULP: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.5.6 OTHER MANUFACTURING APPLICATIONS

TABLE 124 OTHER MANUFACTURING APPLICATIONS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 125 OTHER MANUFACTURING APPLICATIONS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 10.6 OTHER VERTICALS

TABLE 126 ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 127 ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 128 OTHER VERTICALS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 129 OTHER VERTICALS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

##### 10.6.1 COMMERCIAL BUILDINGS

TABLE 130 COMMERCIAL BUILDINGS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 131 COMMERCIAL BUILDINGS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

##### 10.6.2 COMMUNICATION SYSTEMS

TABLE 132 COMMUNICATION SYSTEMS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 133 COMMUNICATION SYSTEMS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

##### 10.6.3 HEALTHCARE

TABLE 134 HEALTHCARE: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 135 HEALTHCARE: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

##### 10.6.4 OTHER APPLICATIONS

TABLE 136 OTHER APPLICATIONS: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 137 OTHER APPLICATIONS: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

## 11 ICS SECURITY MARKET, BY REGION

### 11.1 INTRODUCTION

FIGURE 34 NORTH AMERICA TO BE LARGEST MARKET DURING FORECAST PERIOD

TABLE 138 ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 139 ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

### 11.2 NORTH AMERICA

11.2.1 NORTH AMERICA: ICS SECURITY MARKET DRIVERS

11.2.2 NORTH AMERICA: RECESSION IMPACT

11.2.3 NORTH AMERICA: REGULATORY LANDSCAPE

FIGURE 35 NORTH AMERICA: MARKET SNAPSHOT

TABLE 140 NORTH AMERICA: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 141 NORTH AMERICA: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 142 NORTH AMERICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 143 NORTH AMERICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 144 NORTH AMERICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 145 NORTH AMERICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 146 NORTH AMERICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 147 NORTH AMERICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 148 NORTH AMERICA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 149 NORTH AMERICA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 150 NORTH AMERICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 151 NORTH AMERICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 152 NORTH AMERICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 153 NORTH AMERICA: ICS SECURITY MARKET IN ENERGY & UTILITIES

VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 154 NORTH AMERICA: ICS SECURITY MARKET IN TRANSPORTATION

VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 155 NORTH AMERICA: ICS SECURITY MARKET IN TRANSPORTATION

VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 156 NORTH AMERICA: ICS SECURITY MARKET IN MANUFACTURING

VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 157 NORTH AMERICA: ICS SECURITY MARKET IN MANUFACTURING

VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 158 NORTH AMERICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 159 NORTH AMERICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 160 NORTH AMERICA: ICS SECURITY MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 161 NORTH AMERICA: ICS SECURITY MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

#### 11.2.4 US

##### 11.2.4.1 Securing ICS: Legislation and shielding infrastructure resilience

TABLE 162 US: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 163 US: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 164 US: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 165 US: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 166 US: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 167 US: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 168 US: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 169 US: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 170 US: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 171 US: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 172 US: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 173 US: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 174 US: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 175 US: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 176 US: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 177 US: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 178 US: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 179 US: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 180 US: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 181 US: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.2.5 CANADA

##### 11.2.5.1 Government initiatives implemented against cybercrimes

TABLE 182 CANADA: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 183 CANADA: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 184 CANADA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 185 CANADA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 186 CANADA: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 187 CANADA: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 188 CANADA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 189 CANADA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 190 CANADA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 191 CANADA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD



MILLION)

TABLE 192 CANADA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 193 CANADA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 194 CANADA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 195 CANADA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 196 CANADA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 197 CANADA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 198 CANADA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 199 CANADA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 200 CANADA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 201 CANADA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

## 11.3 EUROPE

### 11.3.1 EUROPE: ICS SECURITY MARKET DRIVERS

### 11.3.2 EUROPE: RECESSION IMPACT

### 11.3.3 EUROPE: REGULATORY LANDSCAPE

TABLE 202 EUROPE: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 203 EUROPE: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 204 EUROPE: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 205 EUROPE: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 206 EUROPE: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 207 EUROPE: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 208 EUROPE: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)



TABLE 209 EUROPE: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 210 EUROPE: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 211 EUROPE: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 212 EUROPE: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 213 EUROPE: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 214 EUROPE: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 215 EUROPE: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 216 EUROPE: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 217 EUROPE: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 218 EUROPE: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 219 EUROPE: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 220 EUROPE: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 221 EUROPE: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 222 EUROPE: ICS SECURITY MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 223 EUROPE: ICS SECURITY MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

#### 11.3.4 UK

##### 11.3.4.1 Strategic initiatives and investments by UK government

TABLE 224 UK: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 225 UK: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 226 UK: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 227 UK: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD

MILLION)

TABLE 228 UK: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 229 UK: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 230 UK: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 231 UK: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 232 UK: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 233 UK: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 234 UK: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 235 UK: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 236 UK: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 237 UK: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 238 UK: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 239 UK: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 240 UK: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 241 UK: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 242 UK: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 243 UK: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

### 11.3.5 GERMANY

#### 11.3.5.1 Revision of IT Security Act

TABLE 244 GERMANY: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 245 GERMANY: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 246 GERMANY: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 247 GERMANY: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 248 GERMANY: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 249 GERMANY: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 250 GERMANY: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 251 GERMANY: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 252 GERMANY: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 253 GERMANY: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 254 GERMANY: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 255 GERMANY: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 256 GERMANY: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 257 GERMANY: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 258 GERMANY: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 259 GERMANY: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 260 GERMANY: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 261 GERMANY: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 262 GERMANY: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 263 GERMANY: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

### 11.3.6 ITALY

11.3.6.1 Collaborations among prominent players to strengthen security in Italy's critical infrastructures

TABLE 264 ITALY: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 265 ITALY: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 266 ITALY: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 267 ITALY: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 268 ITALY: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 269 ITALY: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 270 ITALY: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 271 ITALY: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 272 ITALY: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 273 ITALY: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 274 ITALY: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 275 ITALY: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 276 ITALY: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 277 ITALY: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 278 ITALY: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 279 ITALY: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 280 ITALY: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 281 ITALY: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 282 ITALY: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 283 ITALY: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.3.7 REST OF EUROPE

TABLE 284 REST OF EUROPE: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 285 REST OF EUROPE: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 286 REST OF EUROPE: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 287 REST OF EUROPE: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 288 REST OF EUROPE: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 289 REST OF EUROPE: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 290 REST OF EUROPE: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 291 REST OF EUROPE: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 292 REST OF EUROPE: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 293 REST OF EUROPE: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 294 REST OF EUROPE: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 295 REST OF EUROPE: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 296 REST OF EUROPE: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 297 REST OF EUROPE: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 298 REST OF EUROPE: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 299 REST OF EUROPE: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 300 REST OF EUROPE: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 301 REST OF EUROPE: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 302 REST OF EUROPE: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 303 REST OF EUROPE: ICS SECURITY MARKET IN OTHER VERTICALS,

**BY APPLICATION, 2023–2028 (USD MILLION)****11.4 ASIA PACIFIC****11.4.1 ASIA PACIFIC: ICS SECURITY MARKET DRIVERS****11.4.2 ASIA PACIFIC: RECESSION IMPACT****11.4.3 ASIA PACIFIC: REGULATORY LANDSCAPE****FIGURE 36 ASIA PACIFIC: MARKET SNAPSHOT****TABLE 304 ASIA PACIFIC: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)****TABLE 305 ASIA PACIFIC: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)****TABLE 306 ASIA PACIFIC: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)****TABLE 307 ASIA PACIFIC: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)****TABLE 308 ASIA PACIFIC: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)****TABLE 309 ASIA PACIFIC: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)****TABLE 310 ASIA PACIFIC: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)****TABLE 311 ASIA PACIFIC: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)****TABLE 312 ASIA PACIFIC: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)****TABLE 313 ASIA PACIFIC: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)****TABLE 314 ASIA PACIFIC: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)****TABLE 315 ASIA PACIFIC: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)****TABLE 316 ASIA PACIFIC: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)****TABLE 317 ASIA PACIFIC: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)****TABLE 318 ASIA PACIFIC: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)****TABLE 319 ASIA PACIFIC: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)****TABLE 320 ASIA PACIFIC: ICS SECURITY MARKET IN MANUFACTURING**



VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 321 ASIA PACIFIC: ICS SECURITY MARKET IN MANUFACTURING

VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 322 ASIA PACIFIC: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 323 ASIA PACIFIC: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 324 ASIA PACIFIC: ICS SECURITY MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 325 ASIA PACIFIC: ICS SECURITY MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

#### 11.4.4 CHINA

11.4.4.1 State-backed platforms introduced for reporting vulnerabilities for data protection

TABLE 326 CHINA: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 327 CHINA: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 328 CHINA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 329 CHINA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 330 CHINA: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 331 CHINA: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 332 CHINA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 333 CHINA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 334 CHINA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 335 CHINA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 336 CHINA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 337 CHINA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 338 CHINA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL,



BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 339 CHINA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 340 CHINA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 341 CHINA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 342 CHINA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 343 CHINA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 344 CHINA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 345 CHINA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.4.5 JAPAN

11.4.5.1 Increasing awareness through training programs and collaborations

TABLE 346 JAPAN: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 347 JAPAN: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 348 JAPAN: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 349 JAPAN: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 350 JAPAN: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 351 JAPAN: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 352 JAPAN: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 353 JAPAN: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 354 JAPAN: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 355 JAPAN: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 356 JAPAN: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 357 JAPAN: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 358 JAPAN: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 359 JAPAN: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 360 JAPAN: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 361 JAPAN: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 362 JAPAN: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 363 JAPAN: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 364 JAPAN: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 365 JAPAN: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.4.6 INDIA

##### 11.4.6.1 India's fortified cyber defenses with ICSSTB

TABLE 366 INDIA: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 367 INDIA: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 368 INDIA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 369 INDIA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 370 INDIA: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 371 INDIA: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 372 INDIA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 373 INDIA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 374 INDIA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 375 INDIA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD

MILLION)

TABLE 376 INDIA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 377 INDIA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 378 INDIA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 379 INDIA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 380 INDIA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 381 INDIA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 382 INDIA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 383 INDIA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 384 INDIA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 385 INDIA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.4.7 REST OF ASIA PACIFIC

TABLE 386 REST OF ASIA PACIFIC: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 387 REST OF ASIA PACIFIC: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 388 REST OF ASIA PACIFIC: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 389 REST OF ASIA PACIFIC: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 390 REST OF ASIA PACIFIC: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 391 REST OF ASIA PACIFIC: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 392 REST OF ASIA PACIFIC: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 393 REST OF ASIA PACIFIC: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 394 REST OF ASIA PACIFIC: ICS SECURITY MARKET, BY VERTICAL,

2017–2022 (USD MILLION)

TABLE 395 REST OF ASIA PACIFIC: ICS SECURITY MARKET, BY VERTICAL,  
2023–2028 (USD MILLION)

TABLE 396 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN POWER  
VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 397 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN POWER  
VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 398 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN ENERGY &  
UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 399 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN ENERGY &  
UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 400 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN  
TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 401 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN  
TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 402 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN MANUFACTURING  
VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 403 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN MANUFACTURING  
VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 404 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN OTHER  
VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 405 REST OF ASIA PACIFIC: ICS SECURITY MARKET IN OTHER  
VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

## 11.5 MIDDLE EAST & AFRICA

11.5.1 MIDDLE EAST & AFRICA: ICS SECURITY MARKET DRIVERS

11.5.2 MIDDLE EAST & AFRICA: RECESSION IMPACT

11.5.3 MIDDLE EAST & AFRICA: REGULATORY LANDSCAPE

TABLE 406 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY COMPONENT,  
2017–2022 (USD MILLION)

TABLE 407 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY COMPONENT,  
2023–2028 (USD MILLION)

TABLE 408 MIDDLE EAST & AFRICA: ICS SECURITY SOLUTIONS MARKET, BY  
TYPE, 2017–2022 (USD MILLION)

TABLE 409 MIDDLE EAST & AFRICA: ICS SECURITY SOLUTIONS MARKET, BY  
TYPE, 2023–2028 (USD MILLION)

TABLE 410 MIDDLE EAST & AFRICA: ICS SECURITY SERVICES MARKET, BY  
TYPE, 2017–2022 (USD MILLION)

TABLE 411 MIDDLE EAST & AFRICA: ICS SECURITY SERVICES MARKET, BY  
TYPE, 2023–2028 (USD MILLION)

TABLE 412 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 413 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 414 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 415 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 416 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 417 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 418 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 419 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 420 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 421 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 422 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 423 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 424 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 425 MIDDLE EAST & AFRICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 426 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 427 MIDDLE EAST & AFRICA: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD MILLION)

#### 11.5.4 MIDDLE EAST

##### 11.5.4.1 Expansion of companies' cybersecurity footprint to Middle East

TABLE 428 MIDDLE EAST: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 429 MIDDLE EAST: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 430 MIDDLE EAST: ICS SECURITY SOLUTIONS MARKET, BY TYPE,

2017–2022 (USD MILLION)

TABLE 431 MIDDLE EAST: ICS SECURITY SOLUTIONS MARKET, BY TYPE,  
2023–2028 (USD MILLION)

TABLE 432 MIDDLE EAST: ICS SECURITY SERVICES MARKET, BY TYPE,  
2017–2022 (USD MILLION)

TABLE 433 MIDDLE EAST: ICS SECURITY SERVICES MARKET, BY TYPE,  
2023–2028 (USD MILLION)

TABLE 434 MIDDLE EAST: ICS SECURITY MARKET, BY SECURITY TYPE,  
2017–2022 (USD MILLION)

TABLE 435 MIDDLE EAST: ICS SECURITY MARKET, BY SECURITY TYPE,  
2023–2028 (USD MILLION)

TABLE 436 MIDDLE EAST: ICS SECURITY MARKET, BY VERTICAL, 2017–2022  
(USD MILLION)

TABLE 437 MIDDLE EAST: ICS SECURITY MARKET, BY VERTICAL, 2023–2028  
(USD MILLION)

TABLE 438 MIDDLE EAST: ICS SECURITY MARKET IN POWER VERTICAL, BY  
APPLICATION, 2017–2022 (USD MILLION)

TABLE 439 MIDDLE EAST: ICS SECURITY MARKET IN POWER VERTICAL, BY  
APPLICATION, 2023–2028 (USD MILLION)

TABLE 440 MIDDLE EAST: ICS SECURITY MARKET IN ENERGY & UTILITIES  
VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 441 MIDDLE EAST: ICS SECURITY MARKET IN ENERGY & UTILITIES  
VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 442 MIDDLE EAST: ICS SECURITY MARKET IN TRANSPORTATION  
VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 443 MIDDLE EAST: ICS SECURITY MARKET IN TRANSPORTATION  
VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 444 MIDDLE EAST: ICS SECURITY MARKET IN MANUFACTURING  
VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 445 MIDDLE EAST: ICS SECURITY MARKET IN MANUFACTURING  
VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 446 MIDDLE EAST: ICS SECURITY MARKET IN OTHER VERTICALS, BY  
APPLICATION, 2017–2022 (USD MILLION)

TABLE 447 MIDDLE EAST: ICS SECURITY MARKET IN OTHER VERTICALS, BY  
APPLICATION, 2023–2028 (USD MILLION)

TABLE 448 MIDDLE EAST: ICS SECURITY MARKET, BY REGION, 2017–2022 (USD  
MILLION)

TABLE 449 MIDDLE EAST: ICS SECURITY MARKET, BY REGION, 2023–2028 (USD  
MILLION)



### 11.5.5 GCC

#### 11.5.5.1 Standards outlined in Qatar and initiatives by regional companies

TABLE 450 GCC: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 451 GCC: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 452 GCC: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 453 GCC: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 454 GCC: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 455 GCC: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 456 GCC: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 457 GCC: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 458 GCC: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 459 GCC: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 460 GCC: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 461 GCC: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 462 GCC: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 463 GCC: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 464 GCC: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 465 GCC: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 466 GCC: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 467 GCC: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 468 GCC: ICS SECURITY MARKET IN OTHER VERTICALS, BY



APPLICATION, 2017–2022 (USD MILLION)

TABLE 469 GCC: ICS SECURITY MARKET IN OTHER VERTICALS, BY  
APPLICATION, 2023–2028 (USD MILLION)

11.5.6 REST OF MIDDLE EAST

TABLE 470 REST OF MIDDLE EAST: ICS SECURITY MARKET, BY COMPONENT,  
2017–2022 (USD MILLION)

TABLE 471 REST OF MIDDLE EAST: ICS SECURITY MARKET, BY COMPONENT,  
2023–2028 (USD MILLION)

TABLE 472 REST OF MIDDLE EAST: ICS SECURITY SOLUTIONS MARKET, BY  
TYPE, 2017–2022 (USD MILLION)

TABLE 473 REST OF MIDDLE EAST: ICS SECURITY SOLUTIONS MARKET, BY  
TYPE, 2023–2028 (USD MILLION)

TABLE 474 REST OF MIDDLE EAST: ICS SECURITY SERVICES MARKET, BY  
TYPE, 2017–2022 (USD MILLION)

TABLE 475 REST OF MIDDLE EAST: ICS SECURITY SERVICES MARKET, BY  
TYPE, 2023–2028 (USD MILLION)

TABLE 476 REST OF MIDDLE EAST: ICS SECURITY MARKET, BY SECURITY  
TYPE, 2017–2022 (USD MILLION)

TABLE 477 REST OF MIDDLE EAST: ICS SECURITY MARKET, BY SECURITY  
TYPE, 2023–2028 (USD MILLION)

TABLE 478 REST OF MIDDLE EAST: ICS SECURITY MARKET, BY VERTICAL,  
2017–2022 (USD MILLION)

TABLE 479 REST OF MIDDLE EAST: ICS SECURITY MARKET, BY VERTICAL,  
2023–2028 (USD MILLION)

TABLE 480 REST OF MIDDLE EAST: ICS SECURITY MARKET IN POWER  
VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 481 REST OF MIDDLE EAST: ICS SECURITY MARKET IN POWER  
VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 482 REST OF MIDDLE EAST: ICS SECURITY MARKET IN ENERGY &  
UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 483 REST OF MIDDLE EAST: ICS SECURITY MARKET IN ENERGY &  
UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 484 REST OF MIDDLE EAST: ICS SECURITY MARKET IN  
TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 485 REST OF MIDDLE EAST: ICS SECURITY MARKET IN  
TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 486 REST OF MIDDLE EAST: ICS SECURITY MARKET IN  
MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 487 REST OF MIDDLE EAST: ICS SECURITY MARKET IN

MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 488 REST OF MIDDLE EAST: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 489 REST OF MIDDLE EAST: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.5.7 AFRICA

11.5.7.1 Growth in interlinked industrial infrastructure and cybersecurity in Africa

TABLE 490 AFRICA: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 491 AFRICA: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 492 AFRICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 493 AFRICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 494 AFRICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 495 AFRICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 496 AFRICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 497 AFRICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 498 AFRICA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 499 AFRICA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 500 AFRICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 501 AFRICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 502 AFRICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 503 AFRICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 504 AFRICA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 505 AFRICA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 506 AFRICA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 507 AFRICA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 508 AFRICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 509 AFRICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

## 11.6 LATIN AMERICA

### 11.6.1 LATIN AMERICA: ICS SECURITY MARKET DRIVERS

### 11.6.2 LATIN AMERICA: RECESSION IMPACT

### 11.6.3 LATIN AMERICA: REGULATORY LANDSCAPE

TABLE 510 LATIN AMERICA: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 511 LATIN AMERICA: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 512 LATIN AMERICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 513 LATIN AMERICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 514 LATIN AMERICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 515 LATIN AMERICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 516 LATIN AMERICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 517 LATIN AMERICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 518 LATIN AMERICA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 519 LATIN AMERICA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 520 LATIN AMERICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 521 LATIN AMERICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 522 LATIN AMERICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 523 LATIN AMERICA: ICS SECURITY MARKET IN ENERGY & UTILITIES

VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 524 LATIN AMERICA: ICS SECURITY MARKET IN TRANSPORTATION

VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 525 LATIN AMERICA: ICS SECURITY MARKET IN TRANSPORTATION

VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 526 LATIN AMERICA: ICS SECURITY MARKET IN MANUFACTURING

VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 527 LATIN AMERICA: ICS SECURITY MARKET IN MANUFACTURING

VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 528 LATIN AMERICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 529 LATIN AMERICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 530 LATIN AMERICA: ICS SECURITY MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 531 LATIN AMERICA: ICS SECURITY MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

#### 11.6.4 MEXICO

11.6.4.1 Escalating cyber threats in Mexico prompt need for immediate security measures

TABLE 532 MEXICO: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 533 MEXICO: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 534 MEXICO: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 535 MEXICO: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 536 MEXICO: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 537 MEXICO: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 538 MEXICO: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 539 MEXICO: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 540 MEXICO: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 541 MEXICO: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD

MILLION)

TABLE 542 MEXICO: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 543 MEXICO: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 544 MEXICO: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 545 MEXICO: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 546 MEXICO: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 547 MEXICO: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 548 MEXICO: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 549 MEXICO: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 550 MEXICO: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 551 MEXICO: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.6.5 BRAZIL

##### 11.6.5.1 Establishment of cyberattack response network

TABLE 552 BRAZIL: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 553 BRAZIL: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 554 BRAZIL: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 555 BRAZIL: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 556 BRAZIL: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 557 BRAZIL: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 558 BRAZIL: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)

TABLE 559 BRAZIL: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 560 BRAZIL: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 561 BRAZIL: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 562 BRAZIL: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 563 BRAZIL: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 564 BRAZIL: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 565 BRAZIL: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 566 BRAZIL: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 567 BRAZIL: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 568 BRAZIL: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 569 BRAZIL: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 570 BRAZIL: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 571 BRAZIL: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

#### 11.6.6 REST OF LATIN AMERICA

TABLE 572 REST OF LATIN AMERICA: ICS SECURITY MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 573 REST OF LATIN AMERICA: ICS SECURITY MARKET, BY COMPONENT, 2023–2028 (USD MILLION)

TABLE 574 REST OF LATIN AMERICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 575 REST OF LATIN AMERICA: ICS SECURITY SOLUTIONS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 576 REST OF LATIN AMERICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2017–2022 (USD MILLION)

TABLE 577 REST OF LATIN AMERICA: ICS SECURITY SERVICES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 578 REST OF LATIN AMERICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2017–2022 (USD MILLION)



TABLE 579 REST OF LATIN AMERICA: ICS SECURITY MARKET, BY SECURITY TYPE, 2023–2028 (USD MILLION)

TABLE 580 REST OF LATIN AMERICA: ICS SECURITY MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 581 REST OF LATIN AMERICA: ICS SECURITY MARKET, BY VERTICAL, 2023–2028 (USD MILLION)

TABLE 582 REST OF LATIN AMERICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 583 REST OF LATIN AMERICA: ICS SECURITY MARKET IN POWER VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 584 REST OF LATIN AMERICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 585 REST OF LATIN AMERICA: ICS SECURITY MARKET IN ENERGY & UTILITIES VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 586 REST OF LATIN AMERICA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 587 REST OF LATIN AMERICA: ICS SECURITY MARKET IN TRANSPORTATION VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 588 REST OF LATIN AMERICA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 589 REST OF LATIN AMERICA: ICS SECURITY MARKET IN MANUFACTURING VERTICAL, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 590 REST OF LATIN AMERICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2017–2022 (USD MILLION)

TABLE 591 REST OF LATIN AMERICA: ICS SECURITY MARKET IN OTHER VERTICALS, BY APPLICATION, 2023–2028 (USD MILLION)

## **12 COMPETITIVE LANDSCAPE**

12.1 KEY PLAYERS' STRATEGIES/RIGHT TO WIN

12.2 REVENUE ANALYSIS

FIGURE 37 TOP 5 PLAYERS TO DOMINATE MARKET IN PAST 5 YEARS

12.3 MARKET SHARE ANALYSIS

FIGURE 38 SHARE OF LEADING COMPANIES IN ICS SECURITY MARKET

TABLE 592 ICS SECURITY MARKET: INTENSITY OF COMPETITIVE RIVALRY

12.4 COMPANY EVALUATION MATRIX

12.4.1 STARS

12.4.2 EMERGING LEADERS

12.4.3 PERVASIVE PLAYERS

#### 12.4.4 PARTICIPANTS

FIGURE 39 COMPANY EVALUATION MATRIX, 2022

#### 12.4.5 COMPANY FOOTPRINT

FIGURE 40 PRODUCT FOOTPRINT

TABLE 593 VERTICAL FOOTPRINT

TABLE 594 REGIONAL FOOTPRINT

TABLE 595 OVERALL COMPANY FOOTPRINT

#### 12.5 START-UP/SME EVALUATION MATRIX

##### 12.5.1 PROGRESSIVE COMPANIES

##### 12.5.2 RESPONSIVE COMPANIES

##### 12.5.3 DYNAMIC COMPANIES

##### 12.5.4 STARTING BLOCKS

FIGURE 41 ICS SECURITY MARKET START-UP/SME EVALUATION MATRIX, 2022

##### 12.5.5 COMPETITIVE BENCHMARKING

TABLE 596 ICS SECURITY MARKET: DETAILED LIST OF START-UPS/SMES

TABLE 597 ICS SECURITY MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES FOR VERTICAL

TABLE 598 ICS SECURITY MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES FOR REGION

#### 12.6 COMPETITIVE SCENARIO AND TRENDS

##### 12.6.1 PRODUCT LAUNCHES AND ENHANCEMENTS

TABLE 599 ICS SECURITY MARKET: PRODUCT LAUNCHES AND ENHANCEMENTS, 2021–2023

##### 12.6.2 DEALS

TABLE 600 ICS SECURITY MARKET: DEALS, 2021–2023

### 13 COMPANY PROFILES

(Business overview, Products/Solutions/Services offered, Recent developments & MnM View)\*

#### 13.1 KEY PLAYERS

##### 13.1.1 CISCO

TABLE 601 CISCO: COMPANY OVERVIEW

FIGURE 42 CISCO: COMPANY SNAPSHOT

TABLE 602 CISCO: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 603 CISCO: PRODUCT LAUNCHES

TABLE 604 CISCO: DEALS

##### 13.1.2 ABB

TABLE 605 ABB: COMPANY OVERVIEW

FIGURE 43 ABB: COMPANY SNAPSHOT

TABLE 606 ABB: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 607 ABB: PRODUCT LAUNCHES

TABLE 608 ABB: DEALS

#### 13.1.3 LOCKHEED MARTIN

TABLE 609 LOCKHEED MARTIN: COMPANY OVERVIEW

FIGURE 44 LOCKHEED MARTIN: COMPANY SNAPSHOT

TABLE 610 LOCKHEED MARTIN: PRODUCTS/SOLUTIONS/SERVICES OFFERED

#### 13.1.4 FORTINET

TABLE 611 FORTINET: COMPANY OVERVIEW

FIGURE 45 FORTINET: COMPANY SNAPSHOT

TABLE 612 FORTINET: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 613 FORTINET: PRODUCT LAUNCHES

TABLE 614 FORTINET: DEALS

#### 13.1.5 HONEYWELL

TABLE 615 HONEYWELL: COMPANY OVERVIEW

FIGURE 46 HONEYWELL: COMPANY SNAPSHOT

TABLE 616 HONEYWELL: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 617 HONEYWELL: PRODUCT LAUNCHES

TABLE 618 HONEYWELL: DEALS

#### 13.1.6 PALO ALTO NETWORKS

TABLE 619 PALO ALTO NETWORKS: COMPANY OVERVIEW

FIGURE 47 PALO ALTO NETWORKS: COMPANY SNAPSHOT

TABLE 620 PALO ALTO NETWORKS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 621 PALO ALTO NETWORKS: PRODUCT LAUNCHES

TABLE 622 PALO ALTO NETWORKS: DEALS

#### 13.1.7 BAE SYSTEMS

TABLE 623 BAE SYSTEMS: COMPANY OVERVIEW

FIGURE 48 BAE SYSTEMS: COMPANY SNAPSHOT

TABLE 624 BAE SYSTEMS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

#### 13.1.8 RTX

TABLE 625 RTX: COMPANY OVERVIEW

FIGURE 49 RTX: COMPANY SNAPSHOT

TABLE 626 RTX: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 627 RTX: DEALS

#### 13.1.9 TRELLIX

TABLE 628 TRELLIX: COMPANY OVERVIEW

TABLE 629 TRELLIX: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 630 TRELLIX: PRODUCT LAUNCHES

TABLE 631 TRELLIX: DEALS

13.1.10 CHECK POINT

TABLE 632 CHECK POINT: COMPANY OVERVIEW

FIGURE 50 CHECK POINT: COMPANY SNAPSHOT

TABLE 633 CHECK POINT: PRODUCTS/SOLUTIONS/SERVICES OFFERED

13.1.11 DARKTRACE

13.1.12 KASPERSKY LAB

13.1.13 TENABLE

13.1.14 BELDEN

13.1.15 SOPHOS

13.1.16 CYBERARK

13.1.17 NOZOMI NETWORKS

13.1.18 CYBERBIT

13.1.19 FORESCOUT

13.2 START-UPS/SMES

13.2.1 CLAROTY

13.2.2 DRAGOS

13.2.3 RADIFLOW

13.2.4 VERVE INDUSTRIAL PROTECTION

13.2.5 APPLIED RISK

13.2.6 POSITIVE TECHNOLOGY

\*Details on Business overview, Products offered, Recent developments & MnM View might not be captured in case of unlisted companies.

## **14 ADJACENT MARKETS**

14.1 INTRODUCTION TO ADJACENT MARKETS

TABLE 634 ADJACENT MARKETS AND FORECASTS

14.2 LIMITATIONS

14.3 ADJACENT MARKETS

14.3.1 CRITICAL INFRASTRUCTURE PROTECTION MARKET

TABLE 635 CRITICAL INFRASTRUCTURE PROTECTION MARKET, BY COMPONENT, 2016–2020 (USD MILLION)

TABLE 636 CRITICAL INFRASTRUCTURE PROTECTION MARKET, BY COMPONENT, 2021–2027 (USD MILLION)

TABLE 637 CRITICAL INFRASTRUCTURE PROTECTION SOLUTIONS MARKET, BY TYPE, 2016–2020 (USD MILLION)

TABLE 638 CRITICAL INFRASTRUCTURE PROTECTION SOLUTIONS MARKET, BY

TYPE, 2021–2027 (USD MILLION)

14.3.2 OPERATIONAL TECHNOLOGY (OT) MARKET

TABLE 639 OPERATIONAL TECHNOLOGY SECURITY MARKET, BY OFFERING,  
2017–2022 (USD MILLION)

TABLE 640 OPERATIONAL TECHNOLOGY SECURITY MARKET, BY OFFERING,  
2023–2028 (USD MILLION)

## **15 APPENDIX**

15.1 DISCUSSION GUIDE

15.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

15.3 CUSTOMIZATION OPTIONS

15.4 RELATED REPORTS

15.5 AUTHOR DETAILS

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