

Industrial Control System (ICS) Security Market by Offering (Solutions, Services), Solution (Encryption, SIEM, Firewall, IAM, DDoS Mitigation, Antivirus), Security Type (Network, Endpoint, Database), Vertical, and Region - Global Forecast to 2030

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Abstracts

The industrial control system (ICS) security market size is projected to grow from USD 15.35 billion in 2025 to USD 32.89 billion by 2030 at a compound annual growth rate (CAGR) of 16.5% during the forecast period. Industrial organizations are turning to Zero Trust Architecture to better secure their ICS environments by not automatically trusting any user or device, even inside the network. It uses strict access rules, identity checks, and network segmentation to stop threats from spreading. This approach is becoming essential as more remote access and third-party tools get connected to industrial systems.

'By solution, the firewall segment is estimated to account for the largest market share during the forecast period.'

ICS security firewall solutions are purpose-built to safeguard industrial control systems by monitoring and controlling network traffic between IT and OT environments, enforcing segmentation, and blocking unauthorized access without disrupting real-time operations. These firewalls support industrial protocols like Modbus and DNP3, offer deep packet inspection, and help detect and contain anomalies within control networks. Their adoption is growing due to rising cyber threats targeting critical infrastructure, increased regulatory pressure (e.g., NERC CIP, IEC 62443), and the growing convergence of operational and digital technologies. As industries embrace IIoT, remote access, and cloud-based systems, the need for resilient, protocol-aware firewalls is becoming a core component of ICS security strategies.

'By region, the Asia Pacific market is projected to record the highest growth rate during the forecast period.'

The ICS security landscape in Asia Pacific is intensifying as nations respond to rising cyber threats, digital transformation, and critical infrastructure risks. In Japan, there is strong momentum toward securing OT-IT environments, especially in energy and manufacturing, supported by growing industry participation as seen in JPCERT/CC's 2025 ICS Security Conference, with over 560 attendees. India faces a surge in threats, with a 261% increase in cyberattacks in Q1 2024, and 83% of organizations reported incidents the previous year. This has created a sense of urgency nationwide, leading CERT-In to require cyber incident reports within six hours, which speeds up security measures across sectors like power and transportation. Meanwhile, China is strengthening its ICS defenses under the "Made in China 2025" policy, enacting strict cybersecurity laws, supervised by CNITSEC, and increasing the use of AI and industrial IoT for threat detection. The region as a whole is seeing expanded collaboration between public and private players, wider deployment of Zero Trust architectures, and growing investment in AI-powered tools to protect increasingly connected industrial systems.

Breakdown of Primaries

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 55%, Tier 2 – 20%, and Tier 3 – 25%

By Designation: C-level – 60%, Directors – 15%, and Managers – 25%

By Region: North America – 35%, Europe – 25%, Asia Pacific – 20%, RoW – 20%

The key players in the industrial control system (ICS) security market include Cisco (US), ABB (Switzerland), Lockheed Martin (US), Fortinet (US), Honeywell (US), Palo Alto Networks (US), BAE Systems (UK), RTX (US), Trellix (US), Check Point (Israel), Darktrace (UK), Kaspersky Lab (Russia), Tenable (US), Belden (US), Sophos (UK), CyberArk (US), Claroty (US), Dragos (US), Nozomi Networks (US), Cyberbit (US), Forescout (US), Radiflow (Israel), Verve Industrial Protection (US), Xage Security (US),

Positive Technology (US), and others.

The study includes an in-depth competitive analysis of the key players in the industrial control system (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 Offering (Solution, Services), Solution (Antimalware/ Antivirus, DDOS Mitigation, Encryption, Firewall, Identity & Access Management, Intrusion Detection & Prevention System, Security & Vulnerability Management, Security Configuration Management, Security Information & Event Management (SIEM), Whitelisting, Other Solutions (Honeypots/Deception Technology Platforms and Web Filtering)), Service (Professional Services (Consulting & Integration Services, Support & Maintenance Services, Training & Development Services, Incident Response Services), Managed Services), Security Type (Network Security, Endpoint Security, Application Security, Database Security), Vertical (Power, Energy and Utilities, Transportation, Manufacturing, Others Verticals), 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 with information on the closest approximations of the revenue numbers for the overall industrial control system (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, Legacy infrastructure vulnerabilities), 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 industrial control system (ICS) security market.

Market Development: Comprehensive information about lucrative markets – the report analyses the industrial control system (ICS) security market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the industrial control system (ICS) security market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, such as Cisco (US), ABB (Switzerland), Lockheed Martin (US), Fortinet (US), Honeywell (US), Palo Alto Networks (US), BAE Systems (UK), RTX (US), Trellix (US), Check Point (Israel), Darktrace (UK), Kaspersky Lab (Russia), Tenable (US), Belden (US), Sophos (UK), CyberArk (US), Claroty (US), Dragos (US), Nozomi Networks (US), Cyberbit (US), Forescout (US), Radiflow (Israel), Verve Industrial Protection (US), Xage Security (US), and Positive Technology (US), among others, in the industrial control system (ICS) security market strategies.

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