

Industrial Cybersecurity Market by Security Type (Network, Endpoint, Application, Cloud, Wireless), Offering (Products and Solutions & Services), End-user (Power, Utilities, Chemicals & Manufacturing), Deployment Type and Region - Global Forecast to 2028

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Abstracts

The industrial cybersecurity market is valued at USD 16.3 billion in 2022 and is projected to reach USD 24.4 billion by 2028, growing at a CAGR of 7.7% from 2023 to 2028. Lack of awareness about best practices and criticality of cybersecurity in industrial control systems is one of the major challenges.

“Cloud based deployment type is projected to grow with highest CAGR during the forecast period”

Cloud-based deployment is a type that involves hosting and delivering software applications, services, and data on remote servers provided by a cloud service provider (CSP) over the internet. The organizations working in the industrial cybersecurity market use cloud services to access and manage their computing resources and data remotely instead of running solutions and storing data on local on-premises servers. Some of the characteristics of cloud deployment are remote servers that cloud-based solutions run on servers and infrastructure owned and maintained by a third-party cloud service provider. These servers are distributed across data centers in various geographic locations, help organizations to run globally, and provide data accessibility from anywhere.

“In terms of product gateways is expected to have largest market size during the

forecast period “

Industrial control gateways play a critical role in industrial infrastructure, linking systems, and sensors that communicate using protocols such as Modbus or serial to IP networks for easier remote management and monitoring. Every industrial network has multiple protocols. It is necessary to translate these protocols between different networks because of their complexity. However, many control devices have critical vulnerabilities that stem from well-known insecure programming practices that could have been easily avoided. In an industrial setting, control information has the highest priority; therefore, the primary role of a gateway is to transfer cyclic I/O data (control information) between two networks. In general, a gateway may offer features such as protocol conversion, impedance matching, rate conversion, fault isolation, or signal translations necessary to ensure interoperability between industrial cybersecurity products.

“Chemical & Manufacturing is expected to have second largest CAGR growth during the forecast period”

Cyberattacks on chemical and manufacturing plants include random attacks of trojans, worms, and viruses. Standards such as the Chemical Facility Anti-Terrorism Standards (CFATS) and Cybersecurity Evaluation Tool (CSET) have been introduced to secure industrial control systems in these industries from cyber threats. Government initiatives worldwide, such as the formation of the Cybersecurity Information Sharing Partnership (CISP), have made the protection of industrial control systems critical. The chemical & manufacturing industry is constantly attacked by cybercriminals across the world, thereby demanding advanced solutions and services to ensure plant safety. Hence, solutions & services are expected to continue to hold the largest market share in the next few years.

“India to grow with the highest CAGR in the Asia Pacific region during the forecast period.”

In India, the power sector is witnessing an increasing demand for cybersecurity systems as operations in this industry are gradually turning digital. The awareness about cybersecurity is increasing due to integrating information technology and the IoT into industrial automation processes. These systems could be hacked and manipulated. However, risks associated with cybersecurity are still high due to the inability of various industries in India to monitor, detect, and eliminate cyber threats. Many multinational companies see India as a potential market for new technologies; this is expected to lead to the growth in cyberattacks in the country.

The break-up of primary participants for the report has been shown below:

By Company Type: Tier 1 - 30%, Tier 2 - 38%, and Tier 3 - 32%

By Designation: C-level Executives - 44%, Director Level - 38%, and Others - 18%

By Region: North America - 30%, Europe - 25%, APAC - 26%, and RoW - 19%

Industrial Cybersecurity Market was dominated by IBM (US), Honeywell International (US), ABB (Switzerland), Schneider Electric (France), Cisco Systems (US), McAfee Corporation (US), Siemens (Germany), Dell Technologies (US), Norton LifeLock (US), Rockwell Automation (US). The other company profiles included in the scope are Kaspersky Lab (Russia), Fortinet (US), Palo Alto Network (US), Proofpoint (US), Trend Micro (Japan), Splunk Technology (US), Broadcom Inc. (US), Microsoft Corporation (US), Opswat (US), Dragos Inc. (US), Upstream Security (Israel), Cylus (Israel), Argus Cyber Security (Israel), Cyberark (US), Forescout Technologies Inc (US).

The report defines, describes, and forecasts the industrial cybersecurity market based on deployment type, security type, offering, end user industry and region. It provides detailed information regarding drivers, restraint, opportunities, and challenges influencing the growth of industrial cybersecurity market. It also analyzes competitive developments such as product launches, acquisition, expansion contract, partnership and action carry out by the key players to grow the market.

Reasons to Buy This Report

The report will help the market leaders/new entrants in the market with information on the closest approximations of the revenue for the overall industrial cybersecurity market and the subsegments. The report will help stakeholders understand the competitive landscape and gain more insight to position their business better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key drivers, restraint, opportunities, and challenge.

The report will provide insights into the following pointers:

Analysis of key drivers (Rising government and private investments to create

safe and secure industrial environment), restraints (Lack of Adequate funds , framework and governance required to develop high-end cybersecurity solutions), opportunities (Rising importance of cloud based industrial cybersecurity services), and challenges (Lack of awareness about best practices and criticality of cybersecurity in industrial control systems)

Product development /Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the industrial cybersecurity market.

Market Development: Comprehensive information about lucrative markets; the report analyses the industrial cybersecurity market across various regions.

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

Competitive Assessment: In-depth assessment of market share, growth strategies, and services, offering of leading players like IBM (US), Honeywell International (US), ABB (Switzerland), Schneider Electric (France), Cisco Systems (US), among others in industrial cybersecurity market.

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