

Operational Technology (OT) Security Market by Offering (Solutions & Services), Deployment Mode, Organization Size (SMEs & Large Enterprises), Verticals (Manufacturing, Energy & Power, Oil & Gas) & Region - Global Forecast to 2028

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Abstracts

The global OT security market size is expected to grow from an estimated value of USD 17.9 billion in 2023 to 38.2 billion USD by 2028, at a Compound Annual Growth Rate (CAGR) of 16.3% from 2023 to 2028.

Some factors driving the market growth include the increased use of digital technologies in industrial systems, stringent government regulations related to CIP to boost the adoption of OT security solutions and growing interconnectedness of IT and OT systems to drive OT security growth. However, the lack of trained security analysts to analyze OT security systems and awareness about OT security are expected to hinder market growth.

By Offerings, Services grow at the highest CAGR during the forecasted period.

The global OT security market is categorized into solutions and services based on its offerings. The increased adoption of cloud computing and expanding virtualization across sectors globally have heightened the demand for OT solutions. OT security reinforces organizations' policies for safeguarding endpoints and provides perimeter protection, blocking access to the network for malicious users. The services provided by OT security have become vital for managing and integrating solutions across business operations. These services enable organizations to effectively manage and ensure the continuous functioning of OT security solutions. As a result, these factors are fueling the growth of the services segment in OT security offerings, leading to a projected higher

CAGR during the forecast period.

By Organization size, large enterprises account for a larger market size during the forecasted period.

Based on organization size, enterprises are classified into two categories: large and small enterprises (SMEs). Large enterprises are defined as organizations with more than 1,000 employees. OT security solutions are widely adopted among large enterprises globally as they seek to secure their critical assets. Large organizations primarily implement these solutions to protect networks, data centers, endpoints, devices, users, and applications from unauthorized usage and malicious ransomware attacks. The expansion of the OT security market in large organizations is expected to be driven by their availability of financial resources and substantial infrastructure, which enables them to safeguard their key assets from potential data thefts and cyberattacks. These factors contribute to the growth of OT security solutions among large enterprises, resulting in a higher market size during the forecasted period.

By Vertical, the Energy and power (generation) vertical is projected to grow at the highest CAGR during the forecast period.

OT security solutions are being implemented across various verticals, including transportation & logistics, manufacturing, energy and power (generation), and oil and gas (distribution). Among these verticals, the energy and power sectors widely adopt OT security solutions. The increasing occurrence of cyberattacks on power grids, resulting in prolonged power outages and significant financial losses, drives the need for OT security solutions in this vertical. Securing energy and power infrastructure with OT solutions is critical for both economies and communities. Given the importance of energy and power infrastructure, terrorist attacks targeting such facilities can potentially cause devastating consequences for people's lives and create political instability within a nation. These factors underscore the significance of deploying OT security solutions in the energy and power vertical. As a result, this vertical is projected to experience the highest Compound Annual Growth Rate (CAGR) during the forecasted period.

Breakdown of primaries:

In-depth interviews were conducted with Chief Executive Officers (CEOs), Vice Presidents (VPs), marketing directors, technology and innovation directors, and related key executives from various key companies and organizations operating in the OT security market.

By company type: Tier 1: 25%, Tier 2: 40%, and Tier 3: 35%

By designation: C-level: 30%, Directors: 35%, and others: 35%

By region: North America: 15%, APAC: 30%, Europe: 25%, MEA: 10% and Latin America: 20%

Major vendors in the global OT security market include Broadcom (US), Cisco (US), Fortinet (US), Forcepoint (US), Forescout (US), Trellix (US), Zscaler (US), Darktrace (UK), CyberArk (US), BeyondTrust (US), Microsoft (US), Kaspersky (Russia), Nozomi Networks (US), Rapid7 (US), Checkpoint (Israel), Okta (US), Palo Alto Networks (US), Qualys (US), Radiflow (US), SentinelOne (US), Sophos (UK), Tenable (US), Thales (France), Tripwire (US), Armis (US), Seckiot (France), Siga OT Solutions (Israel), OPSWAT (US), Claroty (US), Cydome (Israel), Dragos (US), Mission Secure (US), Ordr (US), runZero (US), Scadafence (US) and Sectrio (US). The study includes an in-depth competitive analysis of the key players in the OT security market, with their company profiles, recent developments, and key market strategies.

Research coverage

The report segments the OT security market and forecast its size, by Offering (Solutions and Services), Deployment Mode (On-premises and Cloud), Organization Size (SMEs and Large Enterprises), Verticals (Transportation & Logistics, manufacturing, energy and power (generation), oil and gas (distribution), and other verticals), and Region (Americas, Europe, Asia Pacific, and Middle East and Africa).

The study also includes an in-depth competitive analysis of the key players in the market, along with 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 would provide the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market for Operational Technology Security and its subsegments. It would help stakeholders understand the competitive landscape and gain more insights better to position their business and plan suitable go-to-market strategies. It also helps stakeholders understand the pulse of the market and provides them with information on key market

drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Rising demand for Industry 4.0 and smart infrastructure to prioritize the integration of OT Security, Stringent government regulations related to CIP to boost adoption of OT security solutions, The increasing interconnectedness of OT and IT networks), restraints (High procurement costs of OT security solutions, Emerging challenges related to maintenance and upgradation of OT security solutions, Interoperability and Standardization Challenges), opportunities (Increase in demand for professional and managed security services, Technological Advancements to provide opportunities for OT solutions, Growing need to secure OT networks), and challenges (Lack of trained security analysts to analyze OT security systems, Lack of awareness about OT security techniques, and Complexity involved with the OT Environments) influencing the growth of the Operational Technology Security market.

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

Market Development: Comprehensive information about lucrative markets – the report analyses the Operational Technology Security market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in Operational Technology Security market strategies; the report also helps stakeholders understand the pulse of the Operational Technology Security market and provides them with information on key market drivers, restraints, challenges, and opportunities

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players such as Broadcom (US), Cisco (US), Fortinet (US), Forcepoint (US), Forescout (US), Trellix (US), Zscaler (US), Darktrace (UK), CyberArk (US), BeyondTrust (US), among others in the Operational Technology Security market.

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*Details on Business Overview, Products/Solutions/Services offered, Recent Developments, MnM View might not be captured in case of unlisted companies.

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