

ICS Cyber Security Global Market Research Study

FIVE-YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2019

INDUSTRIAL CYBER SECURITY HAS BECOME A GLOBAL PRIORITY

This research addresses the market for Industrial Control System (ICS) Cyber Security Products and Services.

The study considers the security of systems in plants, factories, and SCADA applications. ICS cyber security solutions include products such as firewalls, antivirus (AV), and Whitelisting (WL) software and services to assess, design and implement, and sustain, as well as services to help users detect and manage cyber intrusions.

Businesses have been working to secure their ICSs for many years. However, global events like Stuxnet and the recent attack on Sony have significantly increased the urgency of addressing the cyber security posture of all companies.

Release of the NIST Cyber Security Framework and NERC CIP Version 5 are

also stimulating the market and suggest that the future includes more stringent regulations and compliance.

While high-risk industries are driving the market, every industrial company is concerned about the potential for operational disruptions. Boards and shareholders are demanding that industrial organizations develop cyber security strategies to protect assets and limit risks.

Few organizations have the internal cyber security expertise to meet these demands. They are increasingly turning to ICS suppliers and ICS cyber security specialists to fill this critical gap.

For more information, please visit us at www.arcweb.com/market-studies/.

STRATEGIC ISSUES

ICS cyber security solutions, which are assembled by ICS suppliers, systems integrators, and end users themselves, are different than corporate IT solutions. This makes solutions difficult to understand and makes it difficult to set investment levels. Beyond market size estimates, this report includes surveys of users and ARC analysis of future ICS developments that directly impact future market developments. It addresses strategic questions such as:

- How are companies organized to address cyber security?
- What role do they see for cyber security service providers?
- What security technologies are being used now and which ones are likely to be deployed within ICS?

STUDY CONTENTS

EXECUTIVE OVERVIEW

Market Size and Forecast
Major, Industry, and Regional Trends
Strategies for Success

SCOPE

MARKET SEGMENTATION FIGURES

Market Segmentation by Region
North America
Europe, Middle East, Africa
Latin America
Asia

Market Segmentation by Revenue Category

Hardware
Software
Services

Market Segmentation by Industry

Automotive
Building Automation
Cement & Glass
Chemical
Electric Power Generation
Electric Power T&D
Electronics & Electrical
Food & Beverage
Machinery
Mining & Metals
Oil & Gas

Petrochemical
Pharmaceutical & Biotech
Pulp & Paper
Refining
Semiconductors
Water & Wastewater

Market Segmentation by Product

Conventional Network Equipment
ICS-specific Network Equipment
AV, WL, and Other Software
System Security Management

MARKET FORECAST FIGURES

Total Shipments of ICS Security Solutions
Shipments by Region
Shipments by Revenue Category
Shipments by Industry
Shipments by Product

SUPPLIER PROFILES

Profiles for the major suppliers of ICS cyber security products and services are included. Each profile reviews the company's business, products, and services as it applies to this market segment.

The Worldwide ICS Cyber Security Market

