

# **Global Data Center Logical Security Market Size Study & Forecast, by Solution Type (Threat and Application Security Solution, Access Control and Compliance, Data Protection Solution), by Service Type (Security Consulting Service, Managed Security Service), by Data Center Type (Mid-Size, Enterprise, Large), by Vertical (IT & Telecom, BFSI, Government, Healthcare, Energy, Others) and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global Data Center Logical Security Market is valued at approximately USD 4.8 billion in 2024 and is anticipated to expand at a CAGR of 8.46% over the forecast period 2025-2035. Logical security within data centers refers to a suite of technological solutions, software tools, and service frameworks aimed at safeguarding virtual environments from cyber threats, unauthorized intrusions, and malicious data breaches. As the digital economy continues to accelerate, organizations are increasingly shifting their mission-critical workloads into hybrid and cloud-based data centers, making the security of these infrastructures paramount. The industry's momentum is largely fueled by the rising volume of cyberattacks, stringent regulatory compliance requirements, and the exponential growth of enterprise data. Consequently, enterprises are adopting comprehensive logical security measures that combine access controls, data protection, and advanced threat detection systems.

The surge in digital transformation initiatives, coupled with escalating cloud adoption and virtualization trends, has significantly amplified the demand for logical security solutions across data centers worldwide. These solutions not only ensure regulatory compliance and risk mitigation but also strengthen trust among stakeholders by

safeguarding sensitive data. According to industry sources, cybercrime costs are projected to surpass USD 10 trillion annually by 2025, underscoring the urgency for robust logical security frameworks. Moreover, the expansion of 5G networks, growth of AI-driven applications, and the proliferation of IoT devices have intensified the vulnerabilities within data center environments, further bolstering the demand for advanced security measures. Nevertheless, the high cost of deployment and shortage of skilled cybersecurity professionals remain key challenges that may restrict growth in certain markets during the forecast horizon.

The detailed segments and sub-segments included in the report are:

By Solution Type:

Threat and Application Security Solution

Access Control and Compliance

Data Protection Solution

By Service Type:

Security Consulting Service

Managed Security Service

By Data Center Type:

Mid-Size

Enterprise

Large

By Vertical:

IT and Telecom

BFSI

Government

Healthcare

Energy

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among the verticals, the IT and Telecom sector is expected to dominate the data center logical security market throughout the forecast period. The sector's growing dependence on large-scale data centers for supporting cloud infrastructure, 5G connectivity, and digital content distribution has made it highly vulnerable to cyber threats. Consequently, IT and telecom operators are increasingly investing in multi-layered logical security frameworks to secure digital assets, meet compliance obligations, and ensure uninterrupted service delivery.

When examining the market by solution type, the Threat and Application Security

segment currently accounts for the lion's share of revenue. This dominance is driven by the rising sophistication of cyberattacks that target applications, APIs, and software-defined infrastructures within data centers. However, the Access Control and Compliance segment is also expected to gain significant traction due to growing emphasis on identity management, zero-trust security architectures, and global compliance mandates such as GDPR and HIPAA. The evolving balance between proactive threat detection and stringent access management reflects the nuanced growth dynamics of the market.

The key regions considered for the Global Data Center Logical Security Market study include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America led the global market in 2025, owing to the early adoption of advanced cybersecurity technologies, strong presence of major cloud service providers, and high regulatory standards across industries such as BFSI and healthcare. Meanwhile, Asia Pacific is projected to be the fastest-growing regional market through 2035, fueled by rapid digitalization, booming IT outsourcing sector, and exponential growth in mobile internet usage in countries like India and China. Europe also continues to be a prominent market, with stringent data protection laws driving significant investments in logical security solutions.

Major market players included in this report are:

IBM Corporation

Cisco Systems, Inc.

Dell Technologies Inc.

Hewlett Packard Enterprise (HPE)

Check Point Software Technologies Ltd.

Fortinet, Inc.

Broadcom Inc. (Symantec)

Palo Alto Networks, Inc.

Trend Micro Incorporated

McAfee Corp.

Juniper Networks, Inc.

Microsoft Corporation

Splunk Inc.

Sophos Group plc

Accenture plc

#### Global Data Center Logical Security Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for

stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

#### Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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