

# Global Defense Cybersecurity Market Size study & Forecast, by Component (Hardware, Software, Services) by Deployment Mode (On-premises, Cloud) by Solution, Security Type, and End-use (Network Security) and Regional Forecasts 2025-2035

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## Abstracts

The Global Defense Cybersecurity Market is valued approximately at USD 30.49 billion in 2024 and is anticipated to grow with a CAGR of more than 11.40% over the forecast period 2025-2035. Defense cybersecurity refers to the adoption of advanced technological frameworks, systems, and practices designed to protect sensitive defense infrastructure and intelligence networks from malicious cyberattacks, espionage, and data breaches. Increasing reliance on digital technologies across military operations, coupled with the rising sophistication of cyber warfare tactics employed by adversaries, has compelled governments and defense organizations worldwide to prioritize cybersecurity as a strategic imperative. This heightened emphasis is further reinforced by growing geopolitical tensions, the expansion of connected defense systems, and the acceleration of digital transformation initiatives across the defense sector.

The proliferation of cyberattacks targeting defense networks has amplified the urgency for robust cybersecurity solutions. Defense organizations are confronted with challenges such as securing critical command-and-control systems, satellite communications, and classified databases from advanced persistent threats (APTs) and ransomware campaigns. According to international defense reports, cyber incidents against government and military entities have surged by more than 60% in the past five years, underscoring the escalating threat landscape. Simultaneously, the integration of AI, quantum encryption, and zero-trust security architectures is opening new opportunities for defense cybersecurity vendors. However, the high costs of deployment, along with skill shortages in cybersecurity professionals, continue to restrain adoption in some

regions.

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

By Component:

Hardware

Software

Services

By Deployment Mode:

On-premises

Cloud

By Solution:

[Sub-segments as per solution offerings]

By Security Type:

[Sub-segments as per security type]

By End-use:

Network Security

By Region:

North America

U.S.

Canada

## Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

### On-premises Deployment is Expected to Dominate the Market

On-premises deployment remains the preferred model for defense cybersecurity solutions, commanding the largest share in 2025. The defense sector's stringent requirements for data sovereignty, confidentiality, and full operational control over sensitive intelligence have reinforced the dominance of on-premises infrastructures. National security agencies are reluctant to rely solely on cloud environments due to potential risks associated with third-party data hosting and cross-border jurisdictional issues. Although cloud adoption is accelerating thanks to its scalability and cost-effectiveness, on-premises systems continue to lead because they align more closely with the highly regulated and mission-critical nature of defense operations.

### Software Solutions Lead in Revenue Contribution

When viewed through the lens of component segmentation, software emerges as the primary revenue generator in the defense cybersecurity market. Advanced software platforms deliver capabilities such as intrusion detection, threat intelligence, vulnerability assessment, and endpoint protection, which are indispensable to modern defense operations. Continuous updates and rapid adaptability to evolving threat vectors ensure software's central role in safeguarding military networks. While services—including consulting, training, and managed defense security—are gaining prominence, particularly for emerging economies, software solutions remain the backbone of cybersecurity defenses and hold the lion's share of revenue contribution.

The key regions considered for the Global Defense Cybersecurity Market study include

North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America is projected to dominate the global market in 2025, driven by its strong defense budget allocations, advanced military digitalization programs, and the presence of leading cybersecurity solution providers. Europe follows closely, propelled by rising cyber defense initiatives under NATO frameworks and increasing investments in military modernization programs. Meanwhile, Asia Pacific is expected to be the fastest-growing region, fueled by heightened geopolitical disputes, rapid militarization, and the integration of digital command systems in countries like China, India, and Japan. The expansion of defense budgets in the Middle East and the adoption of advanced cyber shields in Latin America further contribute to the market's global momentum.

Major market players included in this report are:

Lockheed Martin Corporation

Northrop Grumman Corporation

BAE Systems plc

Raytheon Technologies Corporation

Thales Group

General Dynamics Corporation

IBM Corporation

Cisco Systems, Inc.

Booz Allen Hamilton Holding Corporation

Palantir Technologies Inc.

Airbus SE

Leonardo S.p.A.

FireEye, Inc. (Trellix)

Palo Alto Networks, Inc.

Check Point Software Technologies Ltd.

### Global Defense Cybersecurity 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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