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Endpoint Security Market Report by Component (Software, Service), Deployment Mode (On-premises, Cloud-based), Organization Size (Large Enterprises, Small and Medium-sized Enterprises), Vertical (Banking, Financial Services and Insurance (BFSI), IT and Telecommunications, Government and Defense, Healthcare and Life Sciences, Manufacturing, Retail and E-Commerce, and Others), and Region 2024-2032

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Abstracts

The global endpoint security market size reached US$ 18.3 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 42.8 Billion by 2032, exhibiting a growth rate (CAGR) of 9.7% during 2024-2032. The market is driven by increasing cyber threats targeting endpoints, growing adoption of remote work and mobile devices, and the rising need for advanced threat detection and prevention capabilities.

Endpoint Security Market Analysis:

Market Growth and Size: The endpoint security market growth is driven by growing instances of cyber threats targeting endpoint devices such as laptops, desktops, smartphones, and tablets.

Technological Advancements: Technological advancements in endpoint security solutions, such as artificial intelligence (AI), machine learning, and behavioral analytics, are enhancing threat detection and prevention capabilities.

Industry Applications: Industrial uses of endpoint security solutions encompass

various industries, including healthcare, finance, government, and retail, where protecting sensitive data and maintaining regulatory compliance are critical. In the healthcare sector, for instance, endpoint security is essential for protecting patient information and ensuring compliance with healthcare regulations such as HIPAA.

Geographical Trends: According to endpoint security market statistics, North America dominates the market, driven by the presence of major market players, high levels of cybersecurity spending, and stringent regulatory requirements. Europe is also a significant market, with organizations prioritizing endpoint security to comply with GDPR and protect against cyber threats.

Competitive Landscape: Some of the major market players in the endpoint security industry include Avast Software s.r.o., Broadcom Inc., Check Point Software Technologies Ltd., Cisco System Inc., Fortinet Inc., International Business Machines Corporation, Kaspersky Lab, McAfee Corp., Microsoft Corporation, Sophos Group plc, Trend Micro Incorporated, among many others.

Challenges and Opportunities: Challenges in the market include the evolving threat landscape, the complexity of endpoint environments, and the shortage of skilled cybersecurity professionals. However, there are numerous endpoint security market opportunities for vendors to capitalize on emerging trends such as zero trust security, secure access service edge (SASE), and security automation.

Future Outlook: The future outlook for the endpoint security market remains positive, driven by the continued evolution of cyber threats, increasing regulatory scrutiny, and growing adoption of remote work and mobile devices.

Endpoint Security Market Trends:

Increasing security threats

One of the key endpoint security market drivers includes the escalating number of cybersecurity threats, including ransomware, malware, and phishing attacks. As per the 'The Continued Threat to Personal Data: Key Factors Behind the 2023 Increase' report supported by Apple, Inc., the first 9 months of 2023 saw a nearly 20% increase in data breaches in the United States as compared to the entirety of 2022. According to the

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findings of the report, 95% of breached organizations surveyed in 2023 experienced more than one data breach, with over 80% of data breaches involving data stored in the cloud.

For example, in May 2023, a ransomware gang abused a zero-day exploit to compromise the security of over 2,000 organizations worldwide, according to “The State of Ransomware in the US” report from Emsisoft Malware Lab. These included New York City’s public school system, British Airways and BBC. In another instance, in October, Resecurity, an American cyber security company, said that the personally identifiable information of 815 million Indian citizens, including Aadhaar numbers and passport details, were being sold on the dark web. The rising incidences of such attacks are further supporting the endpoint security market growth.

Regulatory compliance

Organizations are under increasing pressure to comply with stringent regulatory requirements concerning data protection and privacy. Regulations such as GDPR, HIPAA, and PCI-DSS mandate strict security measures to protect sensitive information from breaches.

For instance, in July 2023, the Securities and Exchange Commission (SEC) announced the adoption of new rules aimed at enhancing cybersecurity. As per the new rules, public companies are required to disclose material cybersecurity incidents within 4 business days after determining the incident's materiality under the new Item 1.05 of Form 8-K. Furthermore, according to Navex Global’s 2023 Definitive Risk & Compliance Benchmark Report, 83% of risk and compliance professionals said that keeping their organization compliant with all relevant laws, policies, and regulations was a very important or absolutely essential consideration in its decision-making processes.

Increasing remote workforce

The rapid shift to remote work environments has exponentially increased the number of devices accessing corporate networks from various locations. According to the “2022 Workforce Security Report” by Check Point Software Technologies Ltd., 57% of the 1200 security professionals surveyed reported that more than 50% of their workforce works remotely at least 2 days per week. Only 16% of survey respondents reported that their endpoint security solution can automatically detect and stop ransomware attacks.

As per the 'Enduring from Home: COVID-19’s Impact on Business Security' report by

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Malwarebytes Labs, 20% of organizations experienced a breach due to a remote worker, with 24% incurring unexpected expenses to resolve these breaches or malware attacks. Endpoint security solutions are crucial in such scenarios, providing centralized management and consistent security policies across all devices.

According to the Stanford Institute for Economic Policy Research (SIEPR), 40% of workers in the US work from home at least once per week, which accounts for more than 66% of the economic activity. SIEPR further estimates that remote work will continue to grow by 2025, with about 32.6 million people in America working remotely. As remote work emerges as a standard mode of work among organizations, the demand for endpoint security solutions is projected to increase.

Technological advancements

Advanced technologies like machine learning, artificial intelligence (AI), and behavioral analysis are being incorporated into endpoint security solutions to enhance their ability to detect and respond to sophisticated threats that evade traditional security measures. For instance, BlackBerry Cylance, an AI-driven EDR solution, leverages machine learning to predict and interpret future behaviors, thereby enhancing threat detection and response. A survey included in the “AI-Driven EDR” report by SHI International Corp. highlighted that 70% of security teams are using AI in their threat prevention strategies, 77% have prevented more breaches with AI-powered tools, and 87% see AI-powered technology as a competitive advantage for their IT departments.

Endpoint Security Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on component, deployment mode, organization size, and vertical.

Breakup by Component:

Software

Services

Software accounts for the majority of the market share

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The report has provided a detailed breakup and analysis of the market based on the components. This includes software and services. According to the report, software represented the largest segment.

The software segment is driven by the increasing sophistication and frequency of cyber threats targeting endpoints such as laptops, desktops, mobile devices, and servers. Organizations are investing significantly in endpoint security software to protect their networks and data from malware, ransomware, phishing attacks, and other cyber threats, which is boosting the endpoint security market growth. For instance, Trellix, a cybersecurity company, launched the Endpoint Security Suite at RSAC 2023 in San Francisco. It supports both on-premises and cloud deployments. Its Endpoint Detection and Response (EDR) component has received a high rating (4.8 out of 5.0) in the latest Gartner Peer Insights reviews for EDR.

Breakup by Deployment Mode:

On-premises

Cloud-based

On-premises holds the largest market share

A detailed breakup and analysis of the market based on the deployment mode have also been provided in the report. This includes on-premises and cloud-based. According to the report, on-premises represents the largest segment.

The on-premises segment of the endpoint security market involves the deployment of security solutions within the organization's physical infrastructure. This segment is often preferred by enterprises with stringent security and compliance requirements or those handling sensitive data that must remain within their premises. While this segment is typically associated with higher upfront costs for hardware and software licenses, some organizations prefer this model for its perceived advantages in data sovereignty and direct management of security resources. For instance, in November 2023, Kaspersky introduced a new cybersecurity solution, Kaspersky Extended Detection and Response (XDR), which offers comprehensive on-premises security and integrates with both Kaspersky's ecosystem and third-party products. This approach guarantees compliance with various regulatory frameworks such as the GDPR, PCI DSS, and HIPAA, making

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Kaspersky XDR a deployment-agnostic solution that can be adapted to any environment or region.

Breakup by Organization Size:

Large Enterprises

Small and Medium-sized Enterprises

Large enterprises represent the leading market segment

The report has provided a detailed breakup and analysis of the market based on the organization size. This includes large enterprises and small and medium-sized enterprises. According to the report, large enterprises represented the largest segment.

Large enterprises represent the largest segment, characterized by their expansive networks, complex IT infrastructures, and significant data volumes. These enterprises typically require robust endpoint security solutions capable of protecting a multitude of devices and endpoints against advanced cyber threats which is further propelling the endpoint security demand. For instance, in February 2024, Vectra AI, Inc., a leader in hybrid attack detection, investigation and response, launched Vectra MXDR (Managed Extended Detection and Response) services, which is the industry's first global, 24x7 open MXDR service designed to defend against hybrid attacks. This service is particularly relevant for large companies as it offers a comprehensive solution that eliminates silos and provides visibility across the hybrid attack surface, which includes identity, public cloud, SaaS, data center, cloud networks, and endpoints through integrations with leading EDR vendors.

Breakup by Vertical:

Banking, Financial Services and Insurance (BFSI)

IT and Telecommunications

Government and Defense

Healthcare and Life Sciences

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Manufacturing

Retail and E-Commerce

Others

IT and telecommunications represent the leading market segment

The report has provided a detailed breakup and analysis of the market based on the vertical. This includes banking, financial services and insurance (BFSI), IT and telecommunications, government and defense, healthcare and life sciences, manufacturing, retail and e-commerce, and others. According to the report, IT and telecommunications represented the largest segment.

IT and telecommunications companies face a myriad of cybersecurity challenges due to the vast network infrastructure and the proliferation of connected devices. Endpoint security solutions for this sector prioritize real-time threat detection, network visibility, and threat response automation to safeguard against advanced persistent threats (APTs) and zero-day attacks. With the increasing adoption of cloud-based services and remote work arrangements, endpoint security solutions also focus on securing endpoints outside traditional corporate networks. For instance, in March 2024, Chunghwa Telecom, Taiwan's largest telecom company, experienced a data breach in which 1.7TB of data was stolen and subsequently put up for sale on the Dark Web. The Taiwanese Defense Ministry confirmed the breach on March 1, 2024. The stolen data included government-related information from various departments such as the armed forces, foreign affairs ministry, and coast guard.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

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Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

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North America leads the market, accounting for the largest endpoint security market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

The North America endpoint security market is driven by the presence of numerous established cybersecurity firms, high levels of cybersecurity awareness, and stringent regulatory frameworks. Enterprises in this region prioritize investments in endpoint security solutions to protect sensitive data, intellectual property, and critical infrastructure from evolving cyber threats, which is fueling the endpoint security market revenue in the region. Additionally, the proliferation of remote work and cloud adoption has further propelled the demand for endpoint security solutions that can safeguard devices and data across diverse environments. The regional governments are also increasing their spending on cybersecurity, which, in turn, is driving the market growth. For instance, the President’s Fiscal Year 2025 Budget allocated $3 billion to support the Cybersecurity and Infrastructure Security Agency’s (CISA) mission. Within this budget, $470 million has been allocated for the Continuous Diagnostics and Mitigation program, which aims to improve the security posture of federal networks. Also, $116 million towards implementing the Cyber Incident Reporting for Critical Infrastructure Act, which mandates that critical infrastructure entities report cyberattacks.

Leading Key Players in the Endpoint Security Industry:

> The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the endpoint security industry include Avast Software s.r.o., Broadcom Inc., Check Point Software Technologies Ltd., Cisco System Inc., Fortinet Inc., International Business Machines Corporation, Kaspersky Lab, McAfee Corp., Microsoft Corporation, Sophos Group plc, Trend Micro Incorporated. (Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

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(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Leading companies in the market are actively engaged in developing advanced solutions to address the evolving cybersecurity threats targeting endpoint devices. These companies are focusing on integrating artificial intelligence (AI) and machine learning (ML) technologies to enhance the detection and response capabilities of their security platforms. Furthermore, key market participants are expanding their product portfolios through strategic acquisitions and partnerships, enabling them to offer comprehensive security solutions that cover a wide range of endpoint devices, including mobile phones, laptops, and IoT devices. They are also investing in cloud-based security solutions to meet the demand for scalable and flexible security services that can support remote work environments. Through these initiatives, key players in the endpoint security market are strengthening their position and providing businesses with the tools needed to protect their digital assets against sophisticated cyber threats.

Latest News:

April 2024: Tanium, a leader in Converged Endpoint Management (XEM), partnered with Microsoft to integrate its XEM platform with Microsoft Copilot for Security, enhancing real-time AI-driven cybersecurity. This collaboration aims to eliminate blind spots and streamline incident response, leveraging Tanium's endpoint data and Microsoft's advanced large language model (LLM). The solution is designed to improve organizational resiliency and minimize the cybersecurity skills gap.

February 2024: KKR announced the acquisition of Broadcom's End-User Computing Division for approximately $4 billion, making it a standalone company. This division, originally part of VMware, offers digital workspace solutions, including Horizon and Workspace ONE, a Unified Endpoint Management (UEM) platform. The deal aims to empower the division with growth capital and a focus on product innovation and customer relationships. The transaction, supported by financial advisors and legal counsel, is expected to close in 2024, subject to regulatory approvals.

February 2024: ManageEngine, the enterprise IT management division of Zoho Corporation, partnered with Check Point, a leader in cybersecurity solutions, to

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integrate Endpoint Central (a unified endpoint management solution) with Harmony Mobile, addressing the rise in mobile threats. This collaboration aims to automate the remediation of mobile malware, phishing, and spyware by enhancing mobile security capabilities and operational efficiency.

Key Questions Answered in This Report

1. How big is the global endpoint security market?

2. What is the expected growth rate of the global endpoint security market during 2024-2032?

3. What are the key factors driving the global endpoint security market?

4. What has been the impact of COVID-19 on the global endpoint security market?

5. What is the breakup of the global endpoint security market based on the component?

6. What is the breakup of the global endpoint security market based on the deployment mode?

7. What is the breakup of the global endpoint security market based on the organization size?

8. What is the breakup of the global endpoint security market based on the vertical?

9. What are the key regions in the global endpoint security market?

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