

Cyber Security Market - Forecasts from 2020 to 2025

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Abstracts

The global cyber security market was valued at US\$159.821 billion in 2019. The growing incidence of malware and phishing attacks is the major driver of the global cybersecurity market. There has been a rapid adoption of advanced technologies such as the Internet of Things (IoT) which has increased the threat of cyberattacks across various industry verticals. For example, according to the data collected by AtlasVPN, cybersecurity incidents in NASA surged by 366 percent in 2019, that is, from 315 in 2018 to 1,469 in 2019, majorly due to the decline in the NASA's cybersecurity budget over the same period. As such, governments are allocating a hefty amount on cybersecurity budget which is boosting the global cybersecurity market growth significantly. The emerging popularity of cloud-based cybersecurity solutions is another major factor that is spurring the market growth of cybersecurity globally. Growing usage of mobile devices within organizations is further boosting the adoption of cybersecurity solutions and services in order to manage and track the data flow in various systems while protecting crucial information by monitoring, classifying, and resolving different types of cyberattacks.

With the booming demand for cybersecurity solutions, market players have been continuously engaged in various growth strategies in order to grab a larger market share while maintaining their market position by boosting their ability to help enterprises of various sizes anticipate, detect, and respond to cyber threats. Growing digitalization of businesses has increased the level of breach threats which can cause significant business risk. As such, companies are investing heavily in cybersecurity solutions in order to develop a risk-free atmosphere. However, there is still a lack of proper awareness and infrastructure in many countries to deploy cybersecurity solutions which is currently restraining the cybersecurity market growth.

The global cyber security market has been segmented on the basis of component, deployment model, enterprise size, application, industry vertical, and geography. By

component, the global cyber security market has been segmented as solutions and services. On the basis of the deployment model, the segmentation has been done as on-premise and cloud. The global cyber security market has been also segmented by enterprise size as small, medium, and large. By application, the market has been segmented as application security, infrastructure security, identity, and access management, data security and privacy, government risk and compliance, and others. By industry vertical, the global cybersecurity market has been segmented as BFSI, aerospace and defense, retail, IT and telecom, healthcare, energy and utilities, and others.

BFSI sector to hold substantial market share

By industry vertical, the BFSI industry accounts for a noteworthy market share till the end of the forecast period as there has been a frequent number of cyberattacks across this sector. Strict regulations regarding the safety and security of money of banks' customers is also pressurizing them to opt for cybersecurity solutions and services. For example, U.S. federal law requires banks to refund their customers if someone takes money from their account without authorization and they notify the bank within 60 days of the transaction happened.

North America holds a significant market share

Geographically, the global cybersecurity market has been segmented as North America, South America, Europe, Middle East and Africa, and Asia Pacific. North America accounted for the noteworthy market share in 2019 and will remain at its position till the end of the forecast period. A growing number of malicious cyberattacks across various industries is pressurizing governments in the North American countries to focus more on cybersecurity solutions. There has been the implementation of strict regulations regarding the adoption of cybersecurity solutions and services. For example, in September 2018, the White House released the National Cyber Strategy to provide a strategic direction to the Federal government to take action on both short and long term improvements to cybersecurity for individuals, private sector, and the government. Governments are also continuously increasing its budget allocation for cybersecurity solutions. The FY2020 U.S. Budget includes \$17.4 billion of budget authority for cybersecurity-related activities, a rise of 5 percent from the FY2019. These factors are driving the market growth of cybersecurity across this region. The Asia Pacific, however, will experience a substantial CAGR during the forecast period owing to the rapid rise in the number of cyberattacks and ransomware attacks in countries such as India, Philippines, and South Korea. Growing adoption of BYOD (Bring Your Own Device)

policy, especially in small and medium enterprises is also increasing the threat of cyberattacks, thereby escalating the demand for cybersecurity solutions and services in the region. Supportive government initiatives and policies towards cyber laws and data security are further fuelling the market growth of cybersecurity across this region.

Recent Developments:

April 2020: Accenture completed the acquisition of the Symantec Cyber Security Services business from Broadcom Inc.

February 2020: Goldman-backed, Singapore-based cybersecurity startup Cyfirma raised an undisclosed amount under Series A investment from an early growth private equity fund Z3 partners.

December 2019: Accenture acquired the privately-held Australian consultancy Apis Group to bring additional capacity while further strengthening its services to government and healthcare industries in Australia.

August 2019: Cisco acquired Sentryo, a Lyon, France-based company that offers asset visibility and cybersecurity solutions for industrial control systems (ICS).

July 2019: Orange completed the acquisition of SecureLink, the leading cybersecurity market player in Europe for €515 million.

May 2019: Quick Heal Technologies Limited launched its next-generation suite of cybersecurity solutions- 'Lighter Smarter Faster'- for laptops and desktops.

Competitive Insights

Prominent key market players in the global cyber security market include Cognizant, Tata Consultancy Services Limited, Capgemini, IBM, HCL Technologies Limited, Accenture, McAfee, LLC, VMware, Inc, Syneidis, and Quick Heal Technologies Limited. These companies hold a noteworthy share in the market on account of their good brand image and product offerings. Major players in the global cyber security market have been covered along with their relative competitive position and strategies. The report also mentions recent deals and investments of different market players over the last two years.

Segmentation

By Component

Solutions

Services

By Deployment Model

On-Premise

Cloud

By Enterprise Size

Small

Medium

Large

By Application

Application Security

Infrastructure Security

Identity and Access Management

Data Security and Privacy

Government Risk and Compliance

Others

By Industry Vertical

BFSI

Aerospace and Defense

Retail

IT and Telecom

Healthcare

Energy and Utilities

Others

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

UK

Germany

France

Spain

Others

Middle East and Africa

Saudi Arabia

UAE

Israel

Others

Asia Pacific

China

Japan

South Korea

India

Others

Note: The report will be delivered in 3 business days.

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