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Endpoint Detection and Response Market Assessment, By Component [Software, Services], By Organization Size [Large Enterprises, Small & Medium Enterprises], By Application [Workstations, Mobile Devices, Servers, Point of Sale Terminals], By End-use Industry [IT & Telecom, BFSI, Retail, Healthcare, Government, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Global endpoint detection and response market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years. With projected revenue of approximately USD 2.63 billion in 2022, the market is forecasted to reach a value of USD 13.2 billion by 2030, displaying a robust CAGR of 22.4% from 2023 to 2030.

The market for Endpoint Detection and Response Solutions (EDR) encompasses solutions that capture and retain behavioral patterns at the system level of endpoints. These solutions employ diverse data analysis methods to identify unusual system issues, deliver contextual insights, thwart malicious actions and propose corrective actions for reinstating compromised systems. EDR solutions are required to deliver four key fundamental functionalities: identification of security breaches, confinement of incidents at the endpoint, detection of security breaches, and provision of guidance for rectification measures.

The EDR market's growth is driven by the increasing number of cyberattacks, the need to improve endpoint security, and the growing adoption of cloud computing.

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Cyberattacks are becoming sophisticated and targeted, as traditional security solutions are not continuously detecting and responding effectively. EDR solutions provide a more comprehensive approach to endpoint security by monitoring endpoints for suspicious activity and responding to incidents quickly and effectively. The need to improve endpoint security is driving the growth of the EDR market. Endpoints are often the first point of entry for attackers and can be used to access sensitive data and systems. EDR solutions can help organizations identify and mitigate threats at the endpoint before they can cause damage. According to IBM Security Cost of a Data Breach Report 2023, companies bear an average cost of 4.45 USD million.

Increasing Adoption of Cloud Computing Propels Market Growth

The growing adoption of cloud computing worldwide drives the endpoint detection and response market. Cloud computing introduces new security risks that organizations need to address. Endpoint service providers help organizations to mitigate these risks by providing security services for cloud-based applications and data. They provide various security services, such as threat intelligence, vulnerability management, and incident response. Many organizations are utilizing multi-cloud and hybrid cloud models for their operations. This complex landscape requires comprehensive security measures across various endpoint security platforms, making it invaluable in ensuring consistent protection.

For example, Azure launched Azure Synapse Link for Databricks in January 2022. The service allows businesses to connect Azure Synapse Analytics and Databricks to simplify the development and deployment of data pipelines. Azure launched Azure Arc for Serverless in February 2022. This service allows businesses to deploy serverless applications to on-premises infrastructure.

BYOD Model Influencing Endpoint Detection and Response Solutions

The rapid adoption of Bring Your Own Device (BYOD) model has had a significant impact on the endpoint detection and response (EDR) market. BYOD allows employees to use their devices for work purposes, which can introduce new security risks. BYOD devices add a new attack surface to the corporate network. The IT department does not always manage these devices, meaning the latest security patches must be checked regularly. EDR solutions help to detect and respond to malware threats on BYOD devices. EDR solutions can scan devices for malware, block malicious traffic, and quarantine infected devices.

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Additionally, as per HP, Inc., 41% of global remote workers acknowledged access to client data in the previous year. Operational data, financial records, and human resource information frequently become accessible while working remotely. The absence of protection from the corporate firewall for decentralized employees resulted in vulnerabilities within IT security. This circumstance is expected to contribute to an increased demand for the market.

Asia-Pacific to Witness Fastest Growth

The surge in cybercrimes in Asia-Pacific is creating favorable circumstances for expanding endpoint detection solutions. Japanese video game giant Capcom reported a cyberattack. This incident involved Capcom facing a ransom demand of USD 8.8 million in exchange for the restitution of stolen assets, which the company declined to fulfill. Nonetheless, suspicions pointed towards a Russian cybercriminal faction known as Ragnar Locker as the orchestrator behind the appropriation of approximately 350,000 sensitive documents.

For example, in November 2022, Seqrite introduced an upgraded version of its flagship product, End Point Security 8.0 (EPS 8.0), designed to fortify connected devices against cyber threats. Seqrite asserted that this release enhanced the system's capacity for efficiently managing a substantial volume of endpoints, specifically catering to the SME sector and aided clients in minimizing the necessary deployment area and associated responsibilities. The newer version of the product encompassed real-time protection for Linux systems, along with an expanded range of compliance reporting features tailored for regulators, auditors, and customers.

Government Investments to Propel Market

Government initiatives play a significant role in shaping the Endpoint Detection and Response Market. They are implementing and promoting various policies of network security at the global level. These initiatives often focus on data security, privacy regulations, and standardization to build trust and confidence among businesses and consumers. Governments are also investing in cloud infrastructure development, offering incentives, and creating supportive regulatory frameworks to encourage cloud adoption and stimulate innovation. The integration of POS terminals within semi-urban and rural areas plays as a pivotal component of India's Digital India initiative. Notably, the Reserve Bank of India has recently allocated USD 80 million to enhance the deployment of endpoint payment terminals in rural areas, focusing on states in the country's Northeast region. These strategic initiatives are poised to propel market

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growth.

Impact of COVID-19

The COVID-19 pandemic significantly impacted various industries, including cybersecurity and the Global Endpoint Detection and Response Market. The implementation of lockdown measures by numerous governments has influenced the acceptance of endpoint detection and response (EDR) solutions. After the COVID-19 impact, enterprises focused on sophisticated measures that enable contactless operations while ensuring safety and security. Industries spanning BFSI, healthcare, and government, among others, are leveraging technologies such as AI-powered solutions, computational advancements, automation, and cloud-based endpoint detection and response to facilitate their operations. As businesses undergo digital transformation, the need for a dependable EDR solution becomes increasingly prominent. This solution is anticipated to be seamlessly integrated with AI capabilities while offering real-time reporting functionalities.

Key Players Landscape and Outlook

The global endpoint detection and response market is witnessing a swift growth trajectory due to the increasing emphasis placed by companies worldwide on establishing advanced managed security infrastructure. Furthermore, the market expansion is greatly facilitated by the establishment of proper cloud infrastructure, along with significant investments made by companies to enhance research and development resources, engage in collaboration projects, bolster marketing efforts, and expand distribution networks. These factors collectively contribute to the rapid expansion of the market.

In June 2022, AWS Managed Services (AMS) Accelerate introduced a novel cloud operation offering designed to facilitate endpoint operational excellence for customers, regardless of their current stage in the cloud journey. Accelerate can manage a diverse range of workloads operating within AWS, all while granting customers the utmost flexibility to leverage the entire spectrum of AWS services. This dynamic approach harnesses AWS services for operational and security functions, employing tools such as AWS Systems Manager, Amazon CloudWatch, Amazon GuardDuty, and AWS Config.

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