

Application Security Market by Type, Component, Organization Size, Deployment Mode, Vertical (BFSI, Government & Public Sector, Healthcare, Telecommunication, Retail E-commerce, Education, IT&ITES) and Region - Global Forecast to 2029

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Abstracts

The Application Security market size is projected to grow from USD 33.7 billion in 2024 to USD 55.0 billion by 2029 at a compound annual growth rate (CAGR) of 10.3% during the forecast period. The application security market is growing rapidly due to the increasing reliance on applications and the rising threat of cyberattacks. Businesses are focusing on application security to address cyber threats' increasing frequency and sophistication. The widespread use of cloud-based applications requires robust security measures specific to cloud environments. The growing use of APIs presents new security challenges, increasing the demand for API security solutions. The market is expected to grow strongly in the coming years, driven by the evolving threat landscape, tighter regulations, and the increasing adoption of cloud and mobile applications. Emerging trends, such as integrating AI and machine learning into application security solutions, will further influence the market landscape. Products and services in this space include Veracode SAST and Fortify Static Code Analyzer (Micro Focus) for software tools; IBM X-Force Penetration Testing and Rapid7 Managed Detection and Response for services; Imperva Web Application Firewall and Barracuda WAF for web application security; MobileIron App Protection Suite and Checkmarx Mobile for mobile application security for API security.

'By Solution, the Container security will grow at a higher CAGR during the forecast period.'

The container security segment is experiencing significant growth in the application

security (AppSec) market. The rising popularity of containerization, driven by its agility, portability, and efficiency, presents a larger attack surface for cyber threats, making the security of containerized environments a top priority. Traditional security tools often struggle to effectively secure containerized applications, highlighting the need for specialized container security solutions. These solutions focus on addressing the unique vulnerabilities associated with container images, runtime environments, and container orchestration platforms. To meet the needs of DevOps teams, container security solutions offer seamless integration with existing workflows, including container registries, CI/CD pipelines, and orchestration platforms, automating security checks throughout the development lifecycle. They incorporate features for vulnerability management to prioritize and track remediation efforts, along with automated patching processes. As containerized applications are increasingly deployed in cloud environments, container security solutions are evolving to provide cloud-native integrations and compliance with cloud security best practices.

'By Type, the Web application Security segment accounts for the largest market size during the forecast period. '

The web application security segment holds the largest market share within the application security (AppSec) market. Web applications have been around for decades, forming the foundation of much of today's digital landscape. Securing these applications remains a critical priority for organizations of all sizes. Web applications are embedded in nearly every aspect of modern business. Securing these applications protects sensitive data, prevents financial losses, and maintains user trust. Web attackers are constantly developing new techniques to exploit vulnerabilities in web applications. WAF solutions need to adapt to these evolving threats and offer comprehensive protection. Regulations like PCI-DSS mandate strong security measures for web applications handling sensitive financial data. WAF solutions facilitate compliance with these regulations. The shift to cloud-based web applications introduces new security challenges. WAF solutions are evolving to secure cloud-based environments and protect APIs from unauthorized access. WAF solutions are incorporating machine learning and behavioral analytics to detect and block sophisticated attacks that attempt to bypass traditional rules-based security measures.

“By region, North America will have the largest market size during the forecast period.”

The North American application security market is experiencing significant growth driven by several key factors. The alarming increase in security breaches targeting business applications has prompted companies to prioritize enhancing their security

measures, boosting the demand for advanced application security solutions. Additionally, the widespread adoption of cloud-based applications has heightened the need for robust safeguards for cloud-centric operations. Industry leaders like IBM, Synopsys are at the forefront, providing innovative security solutions tailored to the evolving needs of North American businesses. The region's well-established IT infrastructure supports the development and adoption of these cutting-edge solutions. As a hub for global financial institutions, North America sees a high demand for stringent security measures to protect against cyberattacks. The rapid growth of IoT devices across various industries introduces new security challenges, requiring specialized measures to mitigate risks effectively. The focus on developing threat intelligence solutions underscores a proactive approach to identifying and addressing security threats, further driving the growth of the application security market in North America.

Breakdown of primaries:

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the Application Security market.

By company type: Tier 1: 35%, Tier 2: 45%, and Tier 3: 20%

By designation: C-level: 40%, Managers and Other level: 60%

By Region: North America: 20%, Europe: 35%, Asia Pacific: 45%,

Major vendors in the global Application Security market include IBM(US), HCL(India), Synopsys(US), Microfocus(UK), Capgemini(France), Onapsis(US), Cloudflare(US), Guardsquare(Belgium), Checkmarx(US), Fortinet(US), Checkpoint (Israel), Broadcom (US), Palo Alto Networks (US), Qualys (US), Rapid7 (US). The study includes an in-depth competitive analysis of the key Application Security market players, their company profiles, recent developments, and key market strategies.

Research Coverage

The report comprehensively segments the Application Security market. It provides forecasts regarding its size across various dimensions, including Type (web application security, mobile application security), Component(solutions, services), organization size

(large enterprises and SMEs), deployment mode (cloud and on-premises), vertical (BFSI, Government and Public Sector, Healthcare, Telecommunication, Retail&Ecommerce, IT&ITES, Education, other verticals), and region (North America, Europe, Middle East & Africa, Asia Pacific, and Latin America).

Additionally, the study encompasses a thorough competitive analysis of key market players, offering insights into their company profiles, product and business offerings, recent developments, and key market strategies.

Key benefits of buying report

The report offers market leaders and new entrants valuable insights by providing close approximations of revenue figures for the overall Application Security market and its subsegments. Stakeholders can leverage this report to understand the competitive landscape better, enabling them to position their businesses more effectively and develop tailored go-to-market strategies. Additionally, stakeholders can grasp the market dynamics and stay informed about key drivers, restraints, challenges, and opportunities shaping the industry landscape.

The report provides insights on the following pointers:

Analysis of critical drivers (Increase in use of mobile and cloud-based technologies

), restraints (Budget constraints and return on investments pull back companies from investments), opportunities (Adoption of application security in small and medium-sized businesses leads to an increase in demand for the application security market, and challenges Prioritizing and triaging vulnerabilities and security alerts)

Product Development/Innovation: Detailed insights on upcoming technologies, research development activities, new products, and service launches in the Application Security market.

Market Development: Comprehensive information about lucrative markets – the report analyses the Application Security market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the Application

Security market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players IBM(US), HCL(India), Synopsys(US), Microfocus(UK), Capgemini(France), Onapsis(US), Cloudflare(US), Guardsquare(Belgium), Checkmarx(US), Fortinet(US), Checkpoint (Israel), Broadcom (US), Palo Alto Networks (US), Qualys (US), Rapid7 (US) among others, in the Application security market strategies.

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