Attack Surface Management Market by Offering (Solutions, Services), Deployment Mode (Cloud, On-premises), Organization Size (Large Enterprises, SMEs), Vertical (BFSI, Healthcare, Retail & E-Commerce) and Region - Global Forecast to 2029

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Abstracts

The global Attack surface management market size is projected to grow from USD 0.9 billion in 2024 to USD 3.3 billion by 2029 at a compound annual growth rate (CAGR) of 29.3% during the forecast period. The attack surface refers to all the potential points of entry that attackers can use to infiltrate a system or network. This includes software, hardware, configurations, and even human behavior vulnerabilities. Essentially, the more access points, weaknesses, and gaps in the defenses, the larger the attack surface and the easier for attackers to find a way in. The main goal of attack surface management (ASM) is to provide organizations with a comprehensive understanding of their entire attack surface. Through ongoing identification and monitoring of potential entry points, ASM enables proactive vulnerability management and substantial mitigation of security risks. ASM serves as the continuous process of monitoring, remediating, and minimizing all security threats across an organization's attack surface. "By organization size, the SMEs will grow at a higher CAGR during the forecast period."

Small and Medium-sized Enterprises (SMEs) are realizing the importance of robust Attack Surface Management (ASM) solutions to address their escalating security concerns. With limited IT resources and budget constraints compared to larger enterprises, SMEs are particularly susceptible to cyber threats. The proliferation of cloud computing and interconnected systems further compounds their security challenges by expanding their attack surface. Data breaches can devastate SMEs, making compliance with data privacy regulations a paramount concern. The market for ASM solutions tailored to SMEs is experiencing significant growth, with a demand for

cost-effective and user-friendly options.

"By deployment mode, the Cloud segment accounts for the largest market size during the forecast period. "

Cloud-based Attack Surface Management (ASM) offers organizations an effective way to manage their attack surface while harnessing the benefits of cloud computing. It provides cost-effectiveness through subscription models, scalability to adapt to changing IT environments, accessibility from anywhere with internet connectivity, and swift deployment without extensive hardware setup. The ASM market is witnessing a surge in cloud-based deployment driven by scalability and cost-effectiveness, simplifying deployment and management by eliminating the need for on-premises infrastructure management. Cloud-based platforms also foster enhanced collaboration among security teams and enable remote access to security data, promoting efficiency and flexibility. Recent advancements in ASM leverage cloud-native features like containerization and serverless functions for increased agility and scalability, alongside real-time monitoring capabilities and integration with cloud security services for comprehensive security coverage. Factors like widespread cloud adoption, the rise of remote work, and escalating security concerns due to growing cyber threats fuel the demand for cloud-based ASM solutions.

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

The North American Attack Surface Management market, covering the US and Canada, is rapidly expanding due to key industry players and heightened efforts to enhance online security. Cyberattacks in these countries, like ransomware incidents, are surging, prompting increased investment in cybersecurity tools and technologies. Government initiatives like CISA in the US and Cyber Secure certification in Canada support cybersecurity efforts. Strict regulations ensure businesses prioritize cybersecurity, driving the adoption of advanced tools like AI and ML. Collaboration between governments and corporations fosters a more resilient cybersecurity ecosystem, propelling market growth to combat evolving cyber threats effectively.

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 Attack Surface management market.

By company type: Tier 1: 47%, Tier 2: 33%, and Tier 3: 20%

By designation: C-level: 40%, Directors and managers: 60%

By region: North America: 40%, Europe: 30%, Asia Pacific: 20%, ROW: 10%

Major vendors in the global Attack Surface Management market include Palo Alto Networks (US), IBM (US), Microsoft (US), Cisco (US), Google Cloud (US), Trend Micro (Japan), Qulays (US), Tenable (US), CrowdStrike (US), Rapid7 (US), Bitsight (US), Security Scorecard (US), CyCognito (US), Bugcrowd (US), Panorays (US), Cymulate (US), RecordedFuture (US), BishopFox (US), Cyberint (Israel), HackerOne (US), Hadrian (NL), IONIX (Israel), ImmuniWeb (Switzerland), JupiterOne (US), GroupIB (Singapore), Praetorian (US), Censys (US), Balbix (US), Cyble (US), Armis (US), Upgard (US), and WithSecure (Finland). The study includes an in-depth competitive analysis of the key players in the Attack Surface Management market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report comprehensively segments the Attack surface management market. It provides forecasts regarding its size across various dimensions, including Offering(Solutions and services), organization size (large enterprises and SMEs), deployment mode (cloud and on-premises), vertical (BFSI, Healthcare, Retail, and eCommerce, Government, IT, and ITeS, energy and utilities, and others), and region (North America, Europe, Middle East & Africa, Asia Pacific, and Latin America).

Additionally, the study encompasses a thorough competitive analysis of key players in the market, 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 Attack Surface management 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 (Rise in companies' digital footprints; Increasing adoption of Cloud and Software-as-a-Service (SaaS); The flourishing landscape of digital ecosystems), restraints (Integration and complexity of environment; Lack of awareness about Attack Surface Management), opportunities (The convergence of ASM with other security capabilities; Smart automation in ASM leveraging AI and ML, and challenges (Balancing security and operational efficiency; Complexities of vendor overload and resource allocation)

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

Market Development: Comprehensive information about lucrative markets – the report analyses the Attack surface management market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the Attack surface management market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players Palo Alto Networks (US), IBM(US), Microsoft (US), Cisco (US), Google Cloud (US), Trend Micro (Japan), Qulays (US), Tenable (US), Crowdstrike (US), Rapid7 (US), Bitsight(US), SecurityScorecard (US), CyCognito(US), Bugcrowd(US)among others, in the Attack surface management market strategies.

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