

# **Business Email Compromise (BEC) Market by Offering (Solutions and Services), Deployment Mode (Cloud and On-premises), Organization Size (SMEs and Large Enterprises), Vertical (BFSI, Government, Healthcare) and Region - Global Forecast to 2027**

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## **Abstracts**

The global BEC market size is expected to grow from an estimated value of USD 1.1 billion in 2022 to USD 2.8 billion by 2027, at a Compound Annual Growth Rate (CAGR) of 19.4% from 2022 to 2027.

Some of the factors that are driving the market growth include growing incidents of business email compromise scams and spear-phishing attacks, huge financial losses due to BEC crimes, and stringent regulatory standards and data privacy compliances. However, use of free, open-source, and pirated email security software and the high cost associated with the deployment of BEC solutions are expected to hinder the market growth.

Services segment to grow at the highest CAGR during the forecast period

The services segment includes various services that are required to deploy, execute, and maintain BEC detection solutions in organizations. As the adoption of these solutions increases, the demand for these services is also expected to increase. The services include phishing awareness training, simulation services, and technical support services. Various vendors offer BEC response services, which use advanced technology and analysis tools, to investigate email attacks, saving money and getting back quickly and thoroughly to business faster. Some vendors offer services, which can be implemented quickly without additional infrastructure or IT overhead costs. BEC simulation service mimics actual attack scenarios of different types of BEC attacks,

such as fake invoice schemes, CEO spam, account compromise, data theft, attorney impersonation, and tax threats. Employees need to understand the tactics commonly used by cybercriminals, so a crucial role is played by security training services to reduce the likelihood of social engineering attacks resulting in data breaches. Vendors, such as Barracuda Networks, offer security and awareness training solutions to protect against BEC or account compromise. Awareness helps employees exercise caution when receiving and sharing information via emails.

SMEs to grow at the highest CAGR during the forecast period

While the threat of cybercrime is continuously rising, the general awareness and resilience amongst SMEs remains low. One of the most common forms of cyberattacks against SMEs are BEC frauds. These frauds usually occur as a result of a security breach of the business's computer network (or that of a third party), resulting in phishing attacks or email spoofing through social engineering techniques. SMEs have less budget to spend on security as compared to large organizations. In the event of a payment redirection fraud, the threat is more immediate. In this, SMEs either suffer a loss of its funds or those of its clients (which will attract potential liabilities). The COVID-19 pandemic is widely exploited by malicious cyber attackers and APT groups using COVID-19 themes, due to which SMEs are focusing more on the security and adoption of BEC solutions. Even though SMEs have limited budgets, there are various vendors who have curated solutions according to the needs of SMEs. For example, the ZeroFox platform (deployable on cloud) provides advanced, AI-powered protection against phishing and BEC attacks and is the most suited for SMEs.

Asia Pacific to grow at the highest CAGR during the forecast period

The region includes emerging economies such as Japan, China, and Australia. Local firms have emerged as major contributors especially in large markets such as China, Japan, and Indonesia and have been competing with the multi-national companies operating in the region. China, Japan, and Korea have large ICT sectors, and India and Indonesia have developing markets for eCommerce and online services. In accordance with a report by Global System for Mobile Communications (GSMA), the mobile internet user penetration percentage in Asia Pacific in 2019 was 48%. Additionally, with effective government regulations and digitalization initiatives being taken by the government, the BEC market is witnessing high-growth opportunities in this region. The factors such as increase in internet usage, regulatory compliances, and adoption of smart devices are the major factors fueling the adoption of BEC solutions. The region is also seeing a rise in cybercrimes including BEC attacks. In recent years, Asia Pacific has undergone

tremendous economic growth, political transformation, and social change. Asia Pacific is expected to witness a notable adoption of BEC solutions and services as enterprises and SMEs across verticals are deploying BEC solutions to provide the protection to sensitive data.

#### Breakdown of primaries:

The primary sources from the supply side included various industry experts, including Chief Executive Officers (CEOs), Vice Presidents (VPs), marketing directors, technology and innovation directors, and related key executives from various key companies and organizations operating in the BEC market.

By company type: Tier 1: 40%, Tier 2: 35%, and Tier 3: 25%

By designation: C-level executives: 40%, Directors: 35% and Other: 25%

By region: North America: 30%, Europe: 20%, APAC: 45%, RoW: 5%

Major vendors in the global BEC market include Proofpoint (US), Mimecast (UK), Check Point (Israel), Cisco (US), Broadcom (US), Agari (US), Trend Micro (Japan), Zix (US), Barracuda Networks (US), GreatHorn (US), IRONSCALES (US), Area 1 Security (US), Clearswift (UK), Fortinet (US), Tessian (US), Terranova Security (Canada), ZeroFox (US), Heimdal Security (Denmark), Acronis (Switzerland), PhishLabs (US), Redscan (UK), Armorblox (US), Cellopoint (Taiwan), Trustifi (US), and Abnormal Security (US).

The study includes an in-depth competitive analysis of the key players in the BEC market, with their company profiles, recent developments, and key market strategies.

#### Research coverage

The report segments the BEC market and forecasts its size, by offering (Solutions and Services), deployment mode (Cloud and On-premises), organization size (SMEs and Large enterprises), vertical (BFSI, government, IT and ITeS, energy and utilities, healthcare, retail and eCommerce, manufacturing, and other verticals), and by region (North America, Europe, Asia Pacific, Middle East and Africa, and Latin America).

The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and

business offerings, recent developments, and key market strategies.

#### Key benefits of buying the report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall BEC market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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\*Details on Business overview, Products/Solutions/Services offered, Recent developments, MNM view, Right to win, Strategic choices, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

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