

Cloud-native Application Protection Platform (CNAPP) Market by Offering (Platform, Professional Services), Cloud Type (Public Cloud, Hybrid Cloud), Organization Size, Vertical (BFSI, Healthcare, IT and ITeS) and Region - Global Forecast to 2027

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Abstracts

The global CNAPP market is projected to grow from an estimated USD 7.8 billion in 2022 to USD 19.3 billion by 2027, at a Compound Annual Growth Rate (CAGR) of 19.9 % from 2022 to 2027.

Some of the factors driving the market growth, include growing cyber threats being reported and increasing adoption of work from home option by SMEs. However, limited skilled expertise to implement and maintain CNAPP and the need to adhere to changing regulations is expected to hinder the market growth.

Large enterprises to hold larger market size during the forecast period

According to the Organization for Economic Co-operation and Development, large enterprises employ more than 250 people. Large enterprises are early adopters of CNAPP and the associated professional services. Large enterprises have increasingly started using cloud-based systems over traditional on-premises solutions. These enterprises have several departments performing different operations, which makes it difficult for the organization to handle the security posture of the whole organization. Additionally, large enterprises are at greater risk with the onset of the pandemic and the adoption of the Work from Home (WFH) trend. Large enterprises deploy cloud-based solutions due to high flexibility, scalability, and low maintenance costs. As businesses store information and data in the cloud, the requirement for security solutions is also increasing. The increasing cyber threats reported by large organizations are expected to

drive the deployment of CNAPP solutions and services among large enterprises. For instance, in the CNAPP market, CrowdStrike provides CrowdStrike Cloud Security. It allows breach prevention, workload protection, and cloud security posture management. It helps gain unified visibility across the entire cloud, monitor and address misconfigurations, advance identity security, and enforce security policies and compliance to stop cloud breaches. It allows automated discovery, continuous runtime protection, EDR for cloud workloads and containers, and managed threat hunting.

IT & ITeS segment to grow at the highest CAGR during forecast period

With a surge in the adoption of BYOD and work-from-home trends, IT companies are rapidly prioritizing using CNAPP and its associated services. Cloud misconfiguration-related data breaches, such as object storage breaches, unauthorized traffic to a virtual server instance, unauthorized access to database services, and unauthorized user logins, are rising. Public cloud security deployments are the first choice for businesses with low privacy concerns. However, with the need to enhance scalability and flexibility, hybrid cloud deployments are gaining popularity among IT firms as they can balance their workloads by leveraging the benefits of both public and private clouds. Such instances have increased IT organizations' need for hybrid cloud and multi-cloud solutions. The rising instances of cloud-based cyberattacks and cloud-native threats urge IT enterprises to adopt CNAPP and professional services. The IT sector is witnessing a huge technological development. Increasing demand for high-speed connectivity and faster protocols for data transfer are a few of the significant changes the sector is currently undergoing.

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

Asia Pacific experiences considerable security spending owing to the ever-growing threat landscape of the region. The countries in the Asia Pacific region are home to many SMEs. According to the Asia Pacific Economic Cooperation, SMEs are the engines of growth in the Asia Pacific region. They account for over 87 percent of all businesses and employ over half of the workforce in the region. They contribute significantly to economic growth, with their share of GDP ranging from 40 percent to 60 percent in most economies. SMEs are increasingly adopting cloud computing to increase their operational efficiency. During the pandemic, cloud technology has supported global supply chains and remote working. It assists organizations in the region, enabling scalability, business continuity, and reduced costs. Cloud computing has emerged as a foundational infrastructure for building scalable and digitally enabled firms. Multinational cloud platforms, such as Alibaba Cloud, AWS, Google Cloud, and

domestic cloud computing companies across the Asia Pacific, have ramped up their capacities and diversified their service offerings to support businesses and enable a new generation of start-up companies. Regional governments and organizations are taking up several initiatives related to cloud-based solutions. In February 2022, IBM announced an investment in its resources to help businesses prepare for and manage the growing threat of cyberattacks to organizations across the Asia Pacific region. Located in Bengaluru, India, the new facilities represent a strategic hub for IBM cybersecurity activities in the region. However, the increasing digitalization and growing cyberattacks remain a cause for concern, which is fueling the adoption of CNAPP solutions. Organizations in this region are also increasingly focusing on increasing the customer experiences of their clients with enhanced security. Organizations that deal with highly sensitive data are increasingly adopting CNAPP solutions. With effective technological advancements, the CNAPP market is witnessing high growth opportunities in the region.

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 CNAPP market.

By Company Type: Tier 1: 35%, Tier 2: 45%, and Tier 3: 20%

By Designation: C-level: 40%, Managerial and other levels: 60%

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

The major vendors in the CNAPP market include Check Point (Israel), Trend Micro (Japan), Palo Alto Networks (US), CrowdStrike (US), Fortinet (US), Forcepoint (US), Proofpoint (US), Radware (Israel), Zscaler (US), Sophos (UK), Aqua Security (Israel), Cequence Security (US), Illumio (US), Runecast (UK), Data Theorem (US), MetaSecure (US), Tigera (US), Orca Security (US), Skyhigh Security (US), Caveonix (US), Wiz.io (US), Ermetic (US), Banyan Cloud (US), and AccuKnox (US).

Research Coverage

The report segments the CNAPP market and forecasts its size, by offering (platform,

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professional services), cloud type (public cloud, hybrid cloud), organization size (large enterprises, small and medium sized enterprises), vertical (BFSI, healthcare, retail and eCommerce, telecommunication, IT and ITeS), and 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 Report

The report is expected to help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall CNAPP market and sub-segments. It 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 will also help stakeholders understand the pulse of the market and will provide them with information on key market drivers, restraints, challenges, and opportunities.

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