

Cloud Security Market by Offering (Solution and Services), Solutions (CASB, CWPP, CSPM, CDR, and CIEM), Services (Professional and Managed), Service Model (IaaS, SaaS, and PaaS), Type, Vertical, and Region - Global Forecast to 2028

<https://marketpublishers.com/r/C99CC2DE32FEN.html>

Date: August 2023

Pages: 445

Price: US\$ 4,950.00 (Single User License)

ID: C99CC2DE32FEN

Abstracts

The global cloud security market size is projected to grow from USD 40.7 billion in 2023 to USD 62.9 billion by 2028 at a CAGR of 9.1% during the forecast period. The market growth in cloud security is fueled by various factors, including the high adoption of multi-cloud environments, the growing usage of advanced technologies such as AI and ML for cloud security, the increment in the BYOD and CYOD trends, the growth of DevSecOps approaches and practices, and increasing adoption of multi-cloud environments.

“By type, the Data Security segment will grow at the largest market size during the forecast period.”

Data Security holds the highest CAGR during the forecasted period in the cloud security market as it has grown rapidly with more businesses using cloud services to store their data. As cyber-attacks and data breaches increase, companies want better cloud information protection. There are also strict laws about data privacy that companies must follow. Additionally, with more people working remotely, securing data in the cloud has become even more important. Cloud providers and other companies offer specialized security solutions to keep data safe in the cloud. All these reasons have led to a significant increase in the demand for cloud data security, making it the fastest-growing segment in the market.

“By vertical, the BFSI segment will grow at the largest market size during the forecast

period.”

The BFSI (Banking, Financial Services, and Insurance) vertical deals with a vast amount of sensitive customer financial data, making data security a critical concern. To maintain the security of the critical data and the trust of its customers and comply with stringent industry regulations such as GDPR, PCI DSS, and SOX, financial institutions are keen on investing in robust cloud security solutions. Moreover, the increasing adoption of cloud technology within the BFSI industry further drives the demand for cloud security solutions. Cloud-based services offer flexibility, scalability, and cost-efficiency, prompting banks, financial firms, and insurance companies to embrace cloud infrastructure for their operations. However, this digital transformation also brings security challenges, necessitating advanced cloud security measures to protect against data breaches, cyber threats, and unauthorized access. To address these concerns, the BFSI sector is actively seeking comprehensive cloud security solutions to safeguard their valuable data and ensure compliance with industry regulations, solidifying its position as the largest market segment in the cloud security industry.

“North America is expected to account for the largest market size during the forecasted period.”

North America leads the cloud security market due to its robust regulatory environment and advanced cloud adoption practices. Organizations in the region prioritize data protection, leading to increased adoption of cloud security measures like encryption and data threat protection. A study revealed a high incidence of cloud-related security incidents in North America, emphasizing the need for strong security controls. The public and private sectors also collaborate to develop guidelines and innovative solutions, while public-private partnerships promote knowledge sharing and threat intelligence. Moreover, stringent data protection regulations and several key players, startups, and SMEs in the region offering advanced cloud security solutions and services reinforce North America’s dominant position during the forecasted period in the cloud security market.

“Asia Pacific is anticipated to account for the highest CAGR during the forecasted period.”

The Asia Pacific region is experiencing significant digital transformation, with businesses and governments’ rapid adoption of cloud-based technologies. As more organizations shift their operations to the cloud, the demand for robust cloud security solutions increases. Secondly, the Asia Pacific region is witnessing a surge in

cybersecurity threats and attacks, leading to a growing awareness of the importance of cloud security. This heightened concern for data protection and privacy drives businesses to invest in advanced cloud security measures to safeguard sensitive information. Moreover, the region's economic growth and increasing investments in IT infrastructure contribute to the expansion of cloud-based services. As companies modernize their operations and embrace cloud computing, adequate cloud security becomes even more critical to mitigate potential risks.

Additionally, governments in the Asia Pacific are implementing stringent data protection regulations, compelling organizations to prioritize cloud security compliance. This regulatory push encourages businesses to adopt robust cloud security solutions to meet compliance requirements. Furthermore, the region's vast population and growing internet penetration create a fertile ground for cloud services adoption; as more individuals and businesses rely on cloud-based platforms and applications, the demand for secure cloud environments escalates, driving the cloud security market's growth.

Breakdown of primaries

The study contains various industry experts' insights, from suppliers/software developers to OEMs and Tier 1 vendors.

The break-up of the primaries is as follows:

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

By Designation: C-level – 40%, Managerial and Others – 60%

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

The key vendors in the global cloud security market include IBM (US), Broadcom (US), Check Point (Israel and US), Google (US), AWS (US), Zscaler (US), Akamai Technologies (US), Forcepoint (US), Fortinet (US), F5 (US), Qualys (US), TrendMicro (Japan), Palo Alto Networks (US), Proofpoint (US), Tenable (US), Netskope (US), Microsoft (US), Cisco (US), Imperva (US), Trellix (US), Rapid7 (US), Skyhigh Security (US), FireMon (US), Sysdig (US), LookOut (US), Fidelis Cybersecurity (US), DataTheorem (US), OpsCompass (US), Tufin (US), Menlo Security (US), Tigera (US), Orca Security (US), Ascend Technologies (US), Secberus (US), Ermetic (Israel), Sonrai Security (US), Wiz (US), Caveonix (US), Banyan cloud (US), and AccuKnox (US).

The study includes in-depth competitive intelligence covering company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the cloud security market and forecasts its size by offerings (solution and services), keys (CASB, CWPP, CSPM, CDR, and CIEM), services (professional and managed), service model (IaaS, SaaS, and PaaS), type (visibility & risk assessment, governance, IAM, data security, and disaster recovery & business continuity), verticals (BFSI, healthcare, government, retail & eCommerce, IT & ITeS, manufacturing, gaming & entertainment, telecommunication, energy & utilities, travel & hospitality, and research & academia, and region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America).

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall cloud security 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 market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (The growth of DevSecOps practices, Increasing adoption of multi-cloud environments), restraints (Lack of awareness, Complexity in cloud security management), opportunities (The developing cloud computing landscape, Growth of mobile computing), and challenges (Shortage of skilled security professionals, Securing data in transit and at rest).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the cloud security market.

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

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the cloud security market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like IBM (US), Broadcom (US), Check Point (Israel and US), Google (US), AWS (US), Zscaler (US), Akamai Technologies (US), Forcepoint (US), Fortinet (US), F5 (US), Qualys (US), TrendMicro (Japan), Palo Alto Networks (US), Proofpoint (US), Tenable (US), Netskope (US), Microsoft (US), Cisco (US), Imperva (US), Trellix (US), Rapid7 (US), among others in the cloud security market strategies.

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About

Many organizations and enterprises are moving their operations to cloud and this is creating a surge which is pushing the cloud-based security services. Along with the cloud adoption, most of the enterprises have also adopted the security services on cloud to manage their risks. This increased adoption of cloud-based security services is due to the unique features and benefits it provide such as reliability, agility, scalability, guaranteed levels of services, higher return on investment, and easy implementation and maintenance. The emerging model of Security as a Service (SaaS) offers the potential of leveling the playing fields between cyber-offence and cyber-defense. Enterprise Information Technology (IT) departments are finding the SaaS solutions beneficial and easy to collaborate across many locations more quickly and efficiently.

The rise of Bring-Your-Own-Device (BYOD) initiatives and rising usage of mobile in contemporary workplaces have also pushed the market for cloud services. Organizations are now looking for flexible and higher degree of security solutions and services. Many organizations have now started adopting cloud-based security solutions and services for their complex issues. In fact, the adoption of these services by the Small and Medium sized Business (SMB) is also pushing this market in particular. The increasing demand of Managed Security Services (MSS) and need to manage the multi device users are the other important factors that have leveraged this market growth around the globe.

The top cloud-based security services adopted by most of the organizations include cloud Identity and Access Management (IAM)/ Identity as a Service (IDaaS), email security and web security. Data Loss Prevention (DLP) is another important cloud-based security service which is in great demand in the market and is expected to gain traction incoming years. The dynamic changes in the business, security risks and threats have made the security services very important. Deployment of these services through cloud, have enable the organizations to become cost efficient, agile and more productive. However, the thought of giving away the control of valuable data and information to third party is a barrier in the rapid growth of this market. Though people have become comfortable with this concept yet many have a skeptic feeling about the security standards of cloud.

This report provides a detailed analysis of the markets for all the cloud-based security services, such as cloud IAM/IDaaS, DLP, web security (web application firewall), email security, cloud-based Intrusion Detection System (IDS)/ Intrusion Prevention

System (IPS), SIEM(log management and analysis), encryption, Business Continuity and Disaster Recovery (BCDR), network security, cloud database security and virtualization security. It involves detailed analysis of cloud security by deployment models such as public cloud, private cloud and others (hybrid and community). It also includes analysis by industry verticals such as government & public utilities, Banking, Financial Services and Insurance (BFSI), IT and telecommunications, healthcare and life sciences, retail, transportation, media and entertainment and manufacturing; and geographical split in five major regions across the globe: North America, Europe, APAC, MEA and Latin America. The report's strategic section sketches the competitive scenario in the cloud-based security services.

With the advent of globalization, businesses have expanded and spread to overseas locations. According to this report, North America is the largest market for cloud security and regions with growing economies are potential market for cloud security services. MarketsandMarkets expects this market to grow from \$XX billion in 2014 to \$XX billion by 2019, at an estimated Compound Annual Growth Rate (CAGR) of XX% from 2014 to 2019.

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