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Confidential Computing Market by Component (Hardware, Software, Services), Application (Data Security, Secure Enclaves, Pellucidity Between Users), Deployment Mode, Vertical (Retail & Consumer Goods, BFSI) and Region - Global Forecast to 2028

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Abstracts

The confidential computing market size is expected to grow from USD 5.3 billion in 2023 to USD 59.4 billion by 2028 at a Compound Annual Growth Rate (CAGR) of 62.1% during the forecast period. The growing need of confidential AI solutions, rise in edge computing are some of the opportunities for the confidential computing market growth. The lack of awareness regarding confidential computing represents a significant challenge for the growth of the confidential computing market.

As per component, the hardware segment to hold the highest CAGR during the forecast period.

The confidential computing market by component is divided into hardware, software, and services. The services segment is estimated to hold the highest CAGR of 67.8% during the forecasted period of the confidential computing market. The hardware components play a crucial role in providing the necessary security and trust for protecting sensitive data and computations. These hardware components are specifically designed to enhance the security posture of the computing environment.

As per application, data security segment holds the highest CAGR during the forecast period.

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The application is segmented into data security, secure enclaves, pellucidity between users, and other applications. As per application, the data security is expected to hold the highest CAGR of 64.4% during the forecast period. Confidential computing relies on specialized hardware infrastructure to provide secure and isolated environments for data processing. This infrastructure includes trusted execution environments, secure enclaves, and hardware-based security features. Cloud providers and data centers are investing in confidential computing infrastructure to offer secure and trusted computing environments to their customers. The growing adoption of cloud computing and distributed computing environments presents challenges in maintaining data security. Confidential computing addresses these challenges by allowing data owners to maintain control over their data even when processed in third-party environments, mitigating risks associated with data outsourcing.

As per region, Europe holds the second largest market share during the forecast period

The confidential computing market is segmented into five regions, including North America, Europe, Asia Pacific, Middle East & Africa, and Latin America. In terms of global confidential computing market share, Europe holds the second largest market share in 2023 and is expected to last throughout the forecast period. Europe has diverse business needs, as several large retailers and manufacturing companies demand robust and scalable IT infrastructure solutions. The region has always been a challenging market for cloud providers due to the stringent regulations and security standards pertaining to user data privacy. Europe has been at the forefront of data protection regulations, particularly with the implementation of the General Data Protection Regulation (GDPR). GDPR emphasizes the need for data privacy, security, and the protection of individuals' personal data. Confidential computing technologies align with GDPR requirements by enabling secure data processing and minimizing the risk of data breaches. The strict regulatory landscape in Europe has driven organizations to adopt confidential computing solutions to ensure compliance. European businesses and consumers place a high value on privacy and data sovereignty. Confidential computing provides a way to process sensitive data while maintaining control and ownership of that data. It enables organizations to protect their data from unauthorized access, even when it is being processed by third-party systems or in the cloud.

The breakup of the profiles of the primary participants is given below:

By Company: Tier I: 33%, Tier II: 27%, and Tier III: 40%

By Designation: C-Level Executives: 46%, Director Level: 22%, and Others: 32%

By Region: Asia Pacific: 27%, Europe: 28%, North America: 40%, Rest of World: 5%

Note: Others include sales managers, marketing managers, and product managers
Note: Rest of the World includes the Middle East & Africa and Latin America
Note: Tier 1 companies have revenues more than USD 100 million; tier 2 companies' revenue ranges from USD 10 million to USD 100 million; and tier 3 companies' revenue is less than 10 million
Source: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

Some of the major vendors offering confidential computing across the globe are Microsoft (US), IBM (US), Intel (US), Google (US), AMD (US), Fortanix (US), AWS (US), Arm (UK), Alibaba Cloud (China), Swisscom (Switzerland), OVHcloud (France), pheonixNAP (US), AMI (Georgia), Applied Blockchain (UK), R3 (US), Decentriq (Switzerland), Hub Security (Israel), Edgeless Systems (Germany), Cysec (Switzerland), Opaque Systems (US), Profian (US), Super Protocol (US), Secretarium (UK), Anjuna Security (US), and Tresorit (Switzerland).

Research coverage:

The market study covers the confidential computing market across segments. It aims at estimating the market size and the growth potential of this market across different segments, such as component, application, deployment mode, vertical, and region. It 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.

Reasons to buy this 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 confidential computing market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to 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

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drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (increasing concerns regarding data privacy and security, growing adoption of cloud computing, advancements in hardware and software, increasing need to meet regulatory requirements), restraints (high cost related to confidential computing, regulatory compliance issues), opportunities (growing need of Confidential AI solutions, rise in edge computing to boost confidential computing growth, emerging opportunity in cloud-based confidential computing), and challenges (lack of awareness regarding confidential computing, complexity associated with confidential computing technology, limited standards to restricts the usage of confidential computing) influencing the growth of the confidential computing market.

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

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Microsoft (US), IBM (US), Intel (US), Google (US), AMD (US), among others in the confidential computing market.

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Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES
1.2 MARKET DEFINITION
  1.2.1 INCLUSIONS AND EXCLUSIONS
1.3 MARKET SCOPE
  1.3.1 MARKET SEGMENTATION
  1.3.2 REGIONS COVERED
  1.3.3 YEARS CONSIDERED
1.4 CURRENCY
TABLE 1 US DOLLAR EXCHANGE RATE, 2019–2022
1.5 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA
FIGURE 1 CONFIDENTIAL COMPUTING MARKET: RESEARCH DESIGN
  2.1.1 SECONDARY DATA
  2.1.2 PRIMARY DATA
    2.1.2.1 Breakup of primary profiles
FIGURE 2 BREAKUP OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION
    2.1.2.2 Key industry insights
2.2 DATA TRIANGULATION
2.3 MARKET SIZE ESTIMATION
FIGURE 3 CONFIDENTIAL COMPUTING MARKET: TOP-DOWN AND BOTTOM-UP APPROACHES
FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY – APPROACH 1 (SUPPLY SIDE): REVENUE OF SOLUTIONS AND SERVICES FROM CONFIDENTIAL COMPUTING VENDORS
FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH (SUPPLY SIDE): COLLECTIVE REVENUE OF CONFIDENTIAL COMPUTING VENDORS
FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY – (SUPPLY SIDE): CAGR PROJECTIONS FROM SUPPLY SIDE
FIGURE 7 MARKET SIZE ESTIMATION METHODOLOGY – APPROACH 2 (BOTTOM-UP): REVENUE GENERATED BY CONFIDENTIAL COMPUTING VENDORS FROM

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EACH COMPONENT
FIGURE 8 MARKET SIZE ESTIMATION METHODOLOGY – APPROACH 2 (DEMAND SIDE): REVENUE GENERATED FROM DIFFERENT CONFIDENTIAL COMPUTING APPLICATIONS
2.4 MARKET FORECAST
TABLE 2 FACTOR ANALYSIS
2.5 ASSUMPTIONS
2.6 LIMITATIONS

3 EXECUTIVE SUMMARY

FIGURE 9 GLOBAL CONFIDENTIAL COMPUTING MARKET, 2019–2028 (USD MILLION)
FIGURE 10 FASTEST-GROWING SEGMENTS IN CONFIDENTIAL COMPUTING MARKET, 2023–2028
FIGURE 11 HARDWARE SEGMENT TO HAVE HIGHEST CAGR DURING FORECAST PERIOD
FIGURE 12 DATA SECURITY SEGMENT TO ACCOUNT FOR LARGEST MARKET SIZE DURING FORECAST PERIOD
FIGURE 13 CLOUD DEPLOYMENT MODE TO HAVE HIGHER CAGR DURING FORECAST PERIOD
FIGURE 14 BFSI VERTICAL TO HOLD LARGEST MARKET SHARE IN 2023
FIGURE 15 CONFIDENTIAL COMPUTING MARKET: REGIONAL SNAPSHOT

4 PREMIUM INSIGHTS

4.1 OVERVIEW OF CONFIDENTIAL COMPUTING MARKET
FIGURE 16 NEED TO SECURE SENSITIVE DATA AND COMPUTATIONS TO BOOST CONFIDENTIAL COMPUTING MARKET GROWTH
4.2 CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023 VS. 2028
FIGURE 17 SOFTWARE SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD
4.3 CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2023 VS. 2028
FIGURE 18 DATA SECURITY SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD
4.4 CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023 VS. 2028
FIGURE 19 CLOUD SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

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4.5 CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2023–2028
FIGURE 20 BFSI VERTICAL TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD
4.6 CONFIDENTIAL COMPUTING MARKET: REGIONAL SCENARIO, 2023–2028
FIGURE 21 ASIA PACIFIC TO EMERGE AS BEST MARKET FOR INVESTMENTS IN NEXT FIVE YEARS

5 MARKET OVERVIEW AND INDUSTRY TRENDS

5.1 INTRODUCTION
5.2 MARKET DYNAMICS
FIGURE 22 MARKET DYNAMICS: CONFIDENTIAL COMPUTING MARKET
5.2.1 DRIVERS
5.2.1.1 Increasing concerns regarding data privacy and security
FIGURE 23 CLOUD DATA BREACH AMONG TOP IN SERIOUS CLOUD SECURITY INCIDENTS EXPERIENCED IN 2022
5.2.1.2 Growing adoption of cloud computing
FIGURE 24 GLOBAL CLOUD IT INFRASTRUCTURE SPENDING, 2018–2026
5.2.1.3 Advancements in hardware and software
5.2.1.4 Increasing need to meet regulatory requirements
5.2.2 RESTRAINTS
5.2.2.1 High cost related to confidential computing
5.2.2.2 Regulatory compliance issues
FIGURE 25 95% OF ORGANIZATIONS: MODERATELY TO EXTREMELY CONCERNED ABOUT CLOUD SECURITY
5.2.3 OPPORTUNITIES
5.2.3.1 Growing need for confidential AI solutions
5.2.3.2 Rise in edge computing to boost confidential computing growth
5.2.3.3 Emerging opportunity in cloud-based confidential computing
5.2.4 CHALLENGES
5.2.4.1 Lack of awareness regarding confidential computing
5.2.4.2 Complexity associated with confidential computing technology
5.2.4.3 Limited standards to restrict usage of confidential computing
5.3 CASE STUDY ANALYSIS
5.3.1 CASE STUDY 1: SCALING SECURE ENCLAVE ENVIRONMENTS WITH SIGNAL AND AZURE CONFIDENTIAL COMPUTING
5.3.2 CASE STUDY 2: BEEKEEPERAI ACCELERATES HEALTHCARE AI AND ENABLES SECURE HEALTHCARE DATA COLLABORATION WITH FORTANIX CONFIDENTIAL COMPUTING

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5.3.3 CASE STUDY 3: CONVEYING UNIQUE TOP GOLF EXPERIENCE THROUGH VIDEO
5.3.4 CASE STUDY 4: IRENE ENERGY EMBRACES CONFIDENTIAL COMPUTING TO SAFELY DELIVER ELECTRICITY
5.3.5 CASE STUDY 5: MAXIMUM SCALABILITY AND FLEXIBILITY
5.4 SUPPLY CHAIN ANALYSIS
FIGURE 26 CONFIDENTIAL COMPUTING MARKET: SUPPLY CHAIN ANALYSIS
5.5 ECOSYSTEM ANALYSIS
FIGURE 27 CONFIDENTIAL COMPUTING MARKET: ECOSYSTEM ANALYSIS
5.6 TECHNOLOGY ANALYSIS
5.6.1 TRUSTED EXECUTION ENVIRONMENT
5.6.2 HOMOMORPHIC ENCRYPTION
5.6.3 SECURE MULTI-PARTY COMPUTATION
5.6.4 CONFIDENTIAL CONTAINERS
5.6.5 IDENTITY AND ACCESS MANAGEMENT
5.6.6 DATA LOSS PREVENTION
5.7 PRICING ANALYSIS
TABLE 3 CONFIDENTIAL COMPUTING MARKET: PRICING ANALYSIS, BY ANJUNA SECURITY
TABLE 4 CONFIDENTIAL COMPUTING MARKET: PRICING ANALYSIS, BY GOOGLE
5.8 PATENT ANALYSIS
FIGURE 28 NUMBER OF PATENTS PUBLISHED, 2012–2022
FIGURE 29 TOP FIVE PATENT OWNERS (GLOBAL)
TABLE 5 TOP 10 PATENT APPLICANTS (US)
TABLE 6 CONFIDENTIAL COMPUTING MARKET: PATENTS
5.9 PORTER’S FIVE FORCES ANALYSIS
FIGURE 30 CONFIDENTIAL COMPUTING MARKET: PORTER’S FIVE FORCES ANALYSIS
TABLE 7 CONFIDENTIAL COMPUTING MARKET: PORTER’S FIVE FORCES ANALYSIS
5.9.1 THREAT OF NEW ENTRANTS
5.9.2 THREAT OF SUBSTITUTES
5.9.3 BARGAINING POWER OF SUPPLIERS
5.9.4 BARGAINING POWER OF BUYERS
5.9.5 INTENSITY OF COMPETITIVE RIVALRY
5.10 TARIFF AND REGULATORY LANDSCAPE
5.10.1 NORTH AMERICA
5.10.2 EUROPE
5.10.3 ASIA PACIFIC

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5.10.4 MIDDLE EAST AND SOUTH AFRICA
5.10.5 LATIN AMERICA
5.11 KEY CONFERENCES AND EVENTS BETWEEN 2023 AND 2024
TABLE 8 CONFIDENTIAL COMPUTING MARKET: KEY CONFERENCES AND EVENTS BETWEEN 2023 AND 2024
5.12 TRENDS/DISRUPTIONS IMPACTING BUYERS
FIGURE 31 CONFIDENTIAL COMPUTING MARKET: TRENDS/DISRUPTIONS IMPACTING BUYERS
5.13 KEY STAKEHOLDERS AND BUYING CRITERIA
5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS
FIGURE 32 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR END USERS
TABLE 9 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR END USERS (%)
5.13.2 BUYING CRITERIA
FIGURE 33 KEY BUYING CRITERIA FOR END USERS
TABLE 10 KEY BUYING CRITERIA FOR END USERS

6 CONFIDENTIAL COMPUTING MARKET, BY COMPONENT

6.1 INTRODUCTION
FIGURE 34 HARDWARE SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD
6.1.1 COMPONENTS: CONFIDENTIAL COMPUTING MARKET DRIVERS
TABLE 11 CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 12 CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
6.2 HARDWARE
6.2.1 HARDWARE PROVIDES FOUNDATIONAL SECURITY FEATURES AND ISOLATION MECHANISMS
TABLE 13 HARDWARE: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 14 HARDWARE: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
6.3 SOFTWARE
6.3.1 SOFTWARE TOOLS AND PRACTICES SUPPORT SECURE SOFTWARE DEVELOPMENT LIFECYCLE FOR CONFIDENTIAL COMPUTING SOLUTIONS
TABLE 15 SOFTWARE: CONFIDENTIAL COMPUTING MARKET, BY REGION,

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info@marketpublishers.com

2019–2022 (USD MILLION)
TABLE 16 SOFTWARE: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
6.4 SERVICES
6.4.1 ENABLES ORGANIZATIONS TO ADOPT, IMPLEMENT, AND MANAGE SECURE ENCLAVES
TABLE 17 SERVICES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 18 SERVICES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)

7 CONFIDENTIAL COMPUTING MARKET, BY APPLICATION

7.1 INTRODUCTION
FIGURE 35 DATA SECURITY SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD
7.1.1 APPLICATIONS: CONFIDENTIAL COMPUTING MARKET DRIVERS
TABLE 19 APPLICATIONS: CONFIDENTIAL COMPUTING MARKET, 2019–2022 (USD MILLION)
TABLE 20 APPLICATIONS: CONFIDENTIAL COMPUTING MARKET, 2023–2028 (USD MILLION)
7.2 DATA SECURITY
7.2.1 CONFIDENTIAL COMPUTING TECHNOLOGIES ADDRESS CONCERNS RELATED TO DATA RESIDENCY AND SOVEREIGNTY
TABLE 21 DATA SECURITY: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 22 DATA SECURITY: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
7.3 SECURE ENCLAVES
7.3.1 SECURE ENCLAVES ENSURE CONFIDENTIALITY AND INTEGRITY OF DATA BY ENCRYPTING IT WITHIN ENCLAVE
TABLE 23 SECURE ENCLAVES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 24 SECURE ENCLAVES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
7.4 PELLUCIDITY BETWEEN USERS
7.4.1 CONFIDENTIAL COMPUTING TO ESTABLISH TRUST AND CONFIDENCE IN HANDLING OF SENSITIVE DATA WITHIN CONFIDENTIAL COMPUTING ENVIRONMENT

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TABLE 25 PELLUCIDITY BETWEEN USERS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 26 PELLUCIDITY BETWEEN USERS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
7.5 OTHER APPLICATIONS
7.5.1 ORGANIZATIONS SECURELY PROCESS, ANALYZE, AND COLLABORATE ON SENSITIVE DATA WHILE MAINTAINING PRIVACY
TABLE 27 OTHER APPLICATIONS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 28 OTHER APPLICATIONS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)

8 CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE

8.1 INTRODUCTION
FIGURE 36 CLOUD DEPLOYMENT MODE TO GROW AT HIGHER CAGR DURING FORECAST PERIOD
8.1.1 DEPLOYMENT MODES: CONFIDENTIAL COMPUTING MARKET DRIVERS
TABLE 29 CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 30 CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
8.2 ON-PREMISES
8.2.1 ON-PREMISES DEPLOYMENT ALLOWS ORGANIZATIONS TO CUSTOMIZE CONFIDENTIAL COMPUTING INFRASTRUCTURE TO THEIR SPECIFIC NEEDS
TABLE 31 ON-PREMISES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 32 ON-PREMISES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
8.3 CLOUD
8.3.1 CLOUD DEPLOYMENT ENABLES GEOGRAPHICALLY DISTRIBUTED TEAMS TO ACCESS AND COLLABORATE ON CONFIDENTIAL COMPUTING RESOURCES AND DATA
TABLE 33 CLOUD: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 34 CLOUD: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)

9 CONFIDENTIAL COMPUTING MARKET, BY VERTICAL

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9.1 INTRODUCTION
FIGURE 37 BFSI VERTICAL TO DOMINATE MARKET IN 2023
9.1.1 VERTICALS: CONFIDENTIAL COMPUTING MARKET DRIVERS
TABLE 35 CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2019–2022 (USD MILLION)
TABLE 36 CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2023–2028 (USD MILLION)
9.2 BFSI
9.2.1 CONFIDENTIAL COMPUTING HELPS ADDRESS DATA PRIVACY, SECURITY, COMPLIANCE, AND RISK MANAGEMENT
TABLE 37 BFSI: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 38 BFSI: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
9.3 GOVERNMENT & DEFENSE
9.3.1 VIDEO STREAMING SOFTWARE TO ENABLE BETTER CUSTOMER SERVICE AND REACH WIDER AUDIENCE THROUGH MARKETING EFFORTS
TABLE 39 GOVERNMENT & DEFENSE: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 40 GOVERNMENT & DEFENSE: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
9.4 HEALTHCARE & LIFE SCIENCES
9.4.1 CONFIDENTIAL COMPUTING ENHANCES SECURITY OF MEDICAL DEVICES AND CONNECTED HEALTHCARE SYSTEMS
TABLE 41 HEALTHCARE & LIFE SCIENCES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 42 HEALTHCARE & LIFE SCIENCES: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
9.5 IT & TELECOMMUNICATIONS
9.5.1 ORGANIZATIONS TO LEVERAGE ADVANCED TECHNOLOGIES WHILE SAFEGUARDING SENSITIVE INFORMATION
TABLE 43 IT & TELECOMMUNICATIONS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 44 IT & TELECOMMUNICATIONS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
9.6 MANUFACTURING
9.6.1 CONFIDENTIAL COMPUTING ENABLES INNOVATION, PRODUCTIVITY, AND COMPETITIVE ADVANTAGE BY OFFERING SECURE AND RESILIENT DIGITAL

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INFRASTRUCTURE TO MANUFACTURING COMPANIES
TABLE 45 MANUFACTURING: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 46 MANUFACTURING: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
9.7 RETAIL & CONSUMER GOODS
9.7.1 ENABLES RETAILERS TO BUILD CUSTOMER TRUST, MAINTAINS COMPETITIVE ADVANTAGE, AND MITIGATES RISKS ASSOCIATED WITH DATA BREACHES AND UNAUTHORIZED ACCESS TO SENSITIVE INFORMATION
TABLE 47 RETAIL & CONSUMER GOODS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 48 RETAIL & CONSUMER GOODS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
9.8 EDUCATION
9.8.1 CONFIDENTIAL FOSTERS INNOVATION, EMPOWERS PERSONALIZED LEARNING, PROTECTS SENSITIVE DATA, AND FACILITATES SEAMLESS COLLABORATION AND REMOTE LEARNING
TABLE 49 EDUCATION: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 50 EDUCATION: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
9.9 OTHER VERTICALS
TABLE 51 OTHER VERTICALS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 52 OTHER VERTICALS: CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)

10 CONFIDENTIAL COMPUTING MARKET, BY REGION

10.1 INTRODUCTION
FIGURE 38 NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD
TABLE 53 CONFIDENTIAL COMPUTING MARKET, BY REGION, 2019–2022 (USD MILLION)
TABLE 54 CONFIDENTIAL COMPUTING MARKET, BY REGION, 2023–2028 (USD MILLION)
10.2 NORTH AMERICA
10.2.1 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET DRIVERS
10.2.2 NORTH AMERICA: RECESSION IMPACT

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FIGURE 39 NORTH AMERICA: MARKET SNAPSHOT
TABLE 55 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 56 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 57 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2019–2022 (USD MILLION)
TABLE 58 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2023–2028 (USD MILLION)
TABLE 59 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 60 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
TABLE 61 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2019–2022 (USD MILLION)
TABLE 62 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2023–2028 (USD MILLION)
TABLE 63 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2019–2022 (USD MILLION)
TABLE 64 NORTH AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2023–2028 (USD MILLION)
10.2.3 US
10.2.3.1 Presence of several confidential computing providers to drive market
TABLE 65 US: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 66 US: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 67 US: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 68 US: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.2.3.2 Government initiatives and security advancements to fuel adoption of confidential computing services
TABLE 69 CANADA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 70 CANADA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 71 CANADA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)

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TABLE 72 CANADA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.3 EUROPE
10.3.1 EUROPE: CONFIDENTIAL COMPUTING MARKET DRIVERS
10.3.2 EUROPE: RECESSION IMPACT
TABLE 73 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 74 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 75 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2019–2022 (USD MILLION)
TABLE 76 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2023–2028 (USD MILLION)
TABLE 77 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 78 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
TABLE 79 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2019–2022 (USD MILLION)
TABLE 80 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2023–2028 (USD MILLION)
TABLE 81 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2019–2022 (USD MILLION)
TABLE 82 EUROPE: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2023–2028 (USD MILLION)
10.3.3 UK
10.3.3.1 Organizations to recognize importance of data privacy, security, and compliance
TABLE 83 UK: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 84 UK: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 85 UK: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 86 UK: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.3.4 GERMANY
10.3.4.1 Increasing digitalization to fuel growth of confidential computing services
TABLE 87 GERMANY: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT,

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2019–2022 (USD MILLION)
TABLE 88 GERMANY: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 89 GERMANY: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 90 GERMANY: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.3.5 FRANCE
10.3.5.1 Government initiatives to support adoption of cloud technologies
TABLE 91 FRANCE: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 92 FRANCE: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 93 FRANCE: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 94 FRANCE: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.3.6 REST OF EUROPE
TABLE 95 REST OF EUROPE: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 96 REST OF EUROPE: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 97 REST OF EUROPE: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 98 REST OF EUROPE: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.4 ASIA PACIFIC
10.4.1 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET DRIVERS
10.4.2 ASIA PACIFIC: RECESSION IMPACT
FIGURE 40 ASIA PACIFIC: REGIONAL SNAPSHOT
TABLE 99 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 100 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 101 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2019–2022 (USD MILLION)
TABLE 102 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2023–2028 (USD MILLION)
TABLE 103 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY

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DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 104 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
TABLE 105 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2019–2022 (USD MILLION)
TABLE 106 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2023–2028 (USD MILLION)
TABLE 107 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2019–2022 (USD MILLION)
TABLE 108 ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2023–2028 (USD MILLION)
10.4.3 CHINA
10.4.3.1 Increasing digital transformation to fuel market growth
TABLE 109 CHINA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 110 CHINA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 111 CHINA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 112 CHINA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.4.4 JAPAN
10.4.4.1 Rising demand for confidential computing to drive market
TABLE 113 JAPAN: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 114 JAPAN: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 115 JAPAN: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 116 JAPAN: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.4.5 INDIA
TABLE 117 INDIA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 118 INDIA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 119 INDIA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 120 INDIA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT

MODE, 2023–2028 (USD MILLION)
10.4.6 REST OF ASIA PACIFIC
TABLE 121 REST OF ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 122 REST OF ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 123 REST OF ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 124 REST OF ASIA PACIFIC: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.5 MIDDLE EAST & AFRICA
10.5.1 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET DRIVERS
10.5.2 MIDDLE EAST & AFRICA: RECESSION IMPACT
TABLE 125 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 126 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 127 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2019–2022 (USD MILLION)
TABLE 128 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2023–2028 (USD MILLION)
TABLE 129 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 130 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
TABLE 131 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2019–2022 (USD MILLION)
TABLE 132 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2023–2028 (USD MILLION)
TABLE 133 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2019–2022 (USD MILLION)
TABLE 134 MIDDLE EAST & AFRICA: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2023–2028 (USD MILLION)
10.5.3 MIDDLE EAST
10.5.3.1 Data encryption and secure processing to reduce risk of cyber threats targeting critical infrastructure
TABLE 135 MIDDLE EAST: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 136 MIDDLE EAST: CONFIDENTIAL COMPUTING MARKET, BY

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COMPONENT, 2023–2028 (USD MILLION)
TABLE 137 MIDDLE EAST: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 138 MIDDLE EAST: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.5.4 AFRICA
10.5.4.1 Government initiatives to offer positive opportunities for adoption of confidential computing services
TABLE 139 AFRICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 140 AFRICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 141 AFRICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 142 AFRICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.6 LATIN AMERICA
10.6.1 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET DRIVERS
10.6.2 LATIN AMERICA: RECESSION IMPACT
TABLE 143 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 144 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 145 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2019–2022 (USD MILLION)
TABLE 146 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY APPLICATION, 2023–2028 (USD MILLION)
TABLE 147 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 148 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
TABLE 149 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2019–2022 (USD MILLION)
TABLE 150 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY VERTICAL, 2023–2028 (USD MILLION)
TABLE 151 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2019–2022 (USD MILLION)
TABLE 152 LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

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10.6.3 BRAZIL
10.6.3.1 Presence of major confidential computing players to boost market
TABLE 153 BRAZIL: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 154 BRAZIL: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 155 BRAZIL: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 156 BRAZIL: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)
10.6.4 REST OF LATIN AMERICA
TABLE 157 REST OF LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2019–2022 (USD MILLION)
TABLE 158 REST OF LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY COMPONENT, 2023–2028 (USD MILLION)
TABLE 159 REST OF LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2019–2022 (USD MILLION)
TABLE 160 REST OF LATIN AMERICA: CONFIDENTIAL COMPUTING MARKET, BY DEPLOYMENT MODE, 2023–2028 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 INTRODUCTION
11.2 STRATEGIES ADOPTED BY KEY PLAYERS
11.3 MARKET SHARE ANALYSIS
TABLE 161 MARKET SHARE OF KEY VENDORS IN 2022
FIGURE 41 CONFIDENTIAL COMPUTING MARKET: MARKET SHARE ANALYSIS
11.4 HISTORICAL REVENUE ANALYSIS OF TOP VENDORS
FIGURE 42 HISTORICAL REVENUE ANALYSIS, 2018–2022 (USD MILLION)
11.5 COMPANY FINANCIAL METRICS
FIGURE 43 TRADING COMPARABLE (EV/CY25E EBITDAT)
11.6 GLOBAL SNAPSHOT OF KEY MARKET PARTICIPANTS
FIGURE 44 CONFIDENTIAL COMPUTING MARKET: GLOBAL SNAPSHOT OF KEY MARKET PARTICIPANTS, 2022
11.7 KEY COMPANY EVALUATION QUADRANT
FIGURE 45 COMPANY EVALUATION MATRIX FOR KEY PLAYERS: CRITERIA WEIGHTAGE
11.7.1 STARS
11.7.2 EMERGING LEADERS

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11.7.3 PERVASIVE PLAYERS
11.7.4 PARTICIPANTS
FIGURE 46 COMPANY EVALUATION QUADRANT FOR KEY PLAYERS
TABLE 162 OVERALL COMPANY FOOTPRINT FOR KEY PLAYERS
11.8 EVALUATION QUADRANT FOR STARTUPS/SMES, 2022
FIGURE 47 EVALUATION MATRIX FOR STARTUPS/SMES: CRITERIA WEIGHTAGE
11.8.1 RESPONSIVE COMPANIES
11.8.2 PROGRESSIVE COMPANIES
11.8.3 DYNAMIC COMPANIES
11.8.4 STARTING BLOCKS
FIGURE 48 EVALUATION QUADRANT FOR STARTUPS/SMES
TABLE 163 OVERALL COMPANY FOOTPRINT FOR STARTUPS/SMES
11.8.5 COMPETITIVE BENCHMARKING OF STARTUPS/SMES
TABLE 164 DETAILED LIST OF KEY STARTUPS/SMES
11.9 KEY MARKET DEVELOPMENTS
TABLE 165 CONFIDENTIAL COMPUTING MARKET: PRODUCT LAUNCHES AND ENHANCEMENTS, 2020–2023
TABLE 166 CONFIDENTIAL COMPUTING MARKET: DEALS, 2019–2023

12 COMPANY PROFILES

12.1 INTRODUCTION
12.2 MAJOR PLAYERS
(Business overview, Product/Solutions/Services offered, Recent developments, MnM view, Key strengths, Strategic choices, and Weaknesses and competitive threats)*
12.2.1 IBM
TABLE 167 IBM: BUSINESS OVERVIEW
FIGURE 49 IBM: COMPANY SNAPSHOT
TABLE 168 IBM: PRODUCTS/SERVICES OFFERED
TABLE 169 IBM: PRODUCT LAUNCHES AND ENHANCEMENTS
TABLE 170 IBM: DEALS
12.2.2 MICROSOFT
TABLE 171 MICROSOFT: BUSINESS OVERVIEW
FIGURE 50 MICROSOFT: COMPANY SNAPSHOT
TABLE 172 MICROSOFT: PRODUCTS/SERVICES OFFERED
TABLE 173 MICROSOFT: PRODUCT LAUNCHES AND ENHANCEMENTS
TABLE 174 MICROSOFT: DEALS
12.2.3 INTEL
TABLE 175 INTEL: BUSINESS OVERVIEW

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FIGURE 51 INTEL: COMPANY SNAPSHOT
TABLE 176 INTEL: PRODUCTS/SERVICES OFFERED
TABLE 177 INTEL: PRODUCT LAUNCHES & ENHANCEMENT
TABLE 178 INTEL: DEALS
12.2.4 GOOGLE
TABLE 179 GOOGLE: BUSINESS OVERVIEW
FIGURE 52 GOOGLE: COMPANY SNAPSHOT
TABLE 180 GOOGLE: PRODUCTS/SERVICES OFFERED
TABLE 181 GOOGLE: PRODUCT LAUNCHES AND ENHANCEMENTS
TABLE 182 GOOGLE: DEALS
12.2.5 AMD
TABLE 183 AMD: BUSINESS OVERVIEW
FIGURE 53 AMD: COMPANY SNAPSHOT
TABLE 184 AMD: PRODUCTS/SERVICES OFFERED
TABLE 185 AMD: PRODUCT LAUNCHES AND ENHANCEMENTS
TABLE 186 AMD: DEALS
12.2.6 FORTANIX
TABLE 187 FORTANIX: BUSINESS OVERVIEW
TABLE 188 FORTANIX: PRODUCTS/SERVICES OFFERED
TABLE 189 FORTANIX: PRODUCT LAUNCHES AND ENHANCEMENTS
TABLE 190 FORTANIX: DEALS
12.2.7 ARM
TABLE 191 ARM: BUSINESS OVERVIEW
FIGURE 54 ARM: COMPANY SNAPSHOT
TABLE 192 ARM: PRODUCTS/SERVICES OFFERED
TABLE 193 ARM: PRODUCT LAUNCHES & ENHANCEMENTS
12.2.8 AWS
TABLE 194 AWS: BUSINESS OVERVIEW
FIGURE 55 AWS: COMPANY SNAPSHOT
TABLE 195 AWS: PRODUCTS/SERVICES OFFERED
TABLE 196 AWS: PRODUCT LAUNCHES & ENHANCEMENTS
TABLE 197 AWS: DEALS
12.2.9 ALIBABA CLOUD
TABLE 198 ALIBABA CLOUD: BUSINESS OVERVIEW
FIGURE 56 ALIBABA GROUP: COMPANY SNAPSHOT
TABLE 199 ALIBABA CLOUD: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 200 ALIBABA CLOUD: PRODUCT LAUNCHES AND ENHANCEMENTS
12.2.10 SWISSCOM
TABLE 201 SWISSCOM: BUSINESS OVERVIEW

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FIGURE 57 SWISSCOM: COMPANY SNAPSHOT
TABLE 202 SWISSCOM: PRODUCTS/SOLUTIONS OFFERED
TABLE 203 SWISSCOM: DEALS
12.3 OTHER PLAYERS
12.3.1 OVHCLOUD
12.3.2 PHOENIXNAP
12.3.3 AMI
12.4 STARTUPS/SMES
12.4.1 APPLIED BLOCKCHAIN
12.4.2 R3
12.4.3 DECENTRIQ
12.4.4 HUB SECURITY
12.4.5 EDGELESS SYSTEMS
12.4.6 CYSEC
12.4.7 OPAQUE SYSTEMS
12.4.8 PROFIAN
12.4.9 SUPER PROTOCOL
12.4.10 SECRETARIUM
12.4.11 ANJUNA SECURITY
12.4.12 TRESORIT
*Details on Business overview, Product/Solutions/Services offered, Recent developments, MnM view, Key strengths, Strategic choices, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

13 ADJACENT/RELATED MARKETS

13.1 INTRODUCTION
13.1.1 RELATED MARKETS
13.1.2 LIMITATIONS
13.2 DATA PROTECTION MARKET
TABLE 204 DATA PROTECTION MARKET, BY COMPONENT, 2015–2022 (USD BILLION)
TABLE 205 SOLUTIONS: DATA PROTECTION MARKET, BY TYPE, 2015–2022 (USD BILLION)
TABLE 206 DATA PROTECTION MARKET, BY SERVICE, 2015–2022 (USD BILLION)
TABLE 207 DATA PROTECTION MARKET, BY DEPLOYMENT MODE, 2015–2022 (USD BILLION)
TABLE 208 DATA PROTECTION MARKET, BY ORGANIZATION SIZE, 2015–2022 (USD BILLION)

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TABLE 209 DATA PROTECTION MARKET, BY INDUSTRY VERTICAL, 2015–2022 (USD BILLION)
13.3 CLOUD SECURITY MARKET
TABLE 210 CLOUD SECURITY MARKET, BY SECURITY TYPE, 2015–2020 (USD MILLION)
TABLE 211 CLOUD SECURITY MARKET, BY SECURITY TYPE, 2020–2026 (USD MILLION)
TABLE 212 CLOUD SECURITY MARKET, BY APPLICATION, 2015–2020 (USD MILLION)
TABLE 213 CLOUD SECURITY MARKET, BY APPLICATION, 2020–2026 (USD MILLION)
TABLE 214 CLOUD SECURITY MARKET, BY SERVICE MODEL, 2015–2020 (USD MILLION)
TABLE 215 CLOUD SECURITY MARKET, BY SERVICE MODEL, 2020–2026 (USD MILLION)
TABLE 216 CLOUD SECURITY MARKET, BY ORGANIZATION SIZE, 2015–2020 (USD MILLION)
TABLE 217 CLOUD SECURITY MARKET, BY ORGANIZATION SIZE, 2020–2026 (USD MILLION)
TABLE 218 CLOUD SECURITY MARKET, BY VERTICAL, 2015–2020 (USD MILLION)
TABLE 219 CLOUD SECURITY MARKET, BY VERTICAL, 2020–2026 (USD MILLION)

14 APPENDIX

14.1 DISCUSSION GUIDE
14.2 KNOWLEDGESTORE: MARKETSANDMARKETS’ SUBSCRIPTION PORTAL
14.3 CUSTOMIZATION OPTIONS
14.4 RELATED REPORTS
14.5 AUTHOR DETAILS

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