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Cybersecurity Mesh Market by Offering (Solutions, Services), Deployment Mode (Cloud, On-premises), Vertical (IT and ITeS, Healthcare, BFSI, Energy and Utilities), Organization Size (SMEs, Large Enterprises) and Region - Global Forecast to 2027

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Abstracts

The global cybersecurity mesh market is projected to grow from an estimated USD 0.9 billion in 2023 to USD 2.6 billion by 2027, at a Compound Annual Growth Rate (CAGR) of 28.6 % from 2022 to 2027.

Some of the factors driving the market growth include perimeter becoming more fragmented and increasing cyberthreats faced by organizations. However, limited skilled expertise for deployment and usage of cybersecurity mesh solutions is expected to hinder the market growth.

SMEs segment to grow at highest CAGR during the forecast period

SMEs include firms with employee strength between 1–1,000. As SMEs adopt digital technologies, they are more exposed to the risks of cyberattacks. SMEs adopt cybersecurity mesh solutions to protect their organizations from unauthorized access, vulnerabilities, and attacks. One of the prime motives of attackers targeting SMEs is to access the customer's sensitive data, including personal and other confidential information. According to World Bank's report, SMEs Finance, SMEs play a significant role in most economies, particularly in developing countries. According to the report, 600 million jobs will be created by 2030 for the workforce across the globe. In developing countries, most formal jobs are created by SMEs. It states that 7 out of 10 jobs, in these countries, are created by SMEs. However, there are also several restraints in the functioning of SMEs, which include limited resources and budgets

possessed by the SMEs. According to the International Finance Corporation (IFC), 40% of formal small, and medium enterprises in developing countries, have an unmet financing need of USD 5.2 trillion every year. There is also a limitation on the number of employees in the SMEs. Key factors, such as budgetary constraints and lack of skilled expertise, are expected to inhibit the growth of the cybersecurity mesh market.

Cloud segment to grow at highest CAGR during forecast period

In the cloud deployment mode, a third-party service provider takes all the hosting and maintenance requirements. The organization involved in implementing and deploying solutions in the cloud utilizes the pay-as-you-use model. The cloud mode involves built-in data backups and recovery. The maintenance costs are low, and the price is for the resources and space consumed. As the data is shared with the service provider, the security offered is lesser, and the data is at a greater risk. The cloud-based deployment mode has been increasingly being used in recent years. According to the 2022 Cloud Security Report by Check Point, 35% of the respondents in the report have more than 50% of their workloads in the cloud, with 29% stating that they anticipate moving this number up to 75% of workloads in the cloud in the next 12–18 months. Cybersecurity mesh solutions have increasingly used the cloud deployment model in recent years.

Europe to grow at higher CAGR during the forecast period

Europe is one of the leading revenue generators in the cybersecurity mesh market. It has the second-largest market size after North America in the cybersecurity mesh market. The region is experiencing an increasing use of the internet as well as digitalization in the recent years. Organizations in the region are rapidly adopting advanced technology solutions for smooth functioning of business operations. Additionally, the region has a well-developed internet infrastructure and online payments system. Europe’s Digital Decade: Digital Targets for 2030 is one such initiative by the government. The Digital Decade policy programme, with concrete targets and objectives for 2030, will guide Europe’s digital transformation. There are also increasing cyberattacks being faced by the organizations in the region over the years. Several strict regulations and laws are implemented with regards to cybersecurity. The EU Cybersecurity Act strengthens the EU Agency for Cybersecurity and establishes a cybersecurity certification framework for products and services. The Network and Information Security Directive is the first piece of EU-wide legislation on cybersecurity and its specific aim was to achieve a high common level of cybersecurity across the Member States. The increasing cyberthreats and strict regulations implemented, have prompted organizations to adopt cybersecurity mesh solutions.

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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 multi-cloud security 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%, and North America: 20%

The major cybersecurity mesh market vendors include IBM (US), Palo Alto Networks (US), Check Point (Israel), Zscaler (US), Fortinet (US), GCA Technology (US), Forcepoint (US), SonicWall (US), Ivanti (US), Cato Networks (Israel), Aryaka Networks (US), SailPoint (US), appNovi (US), Appgate (US), Mesh Security (Israel), Primeter 81 (Israel), Naoris Protocol (Portugal), and Exium (US).

Research Coverage

The report segments the cybersecurity mesh market and forecasts its size, by offering (solutions, services), deployment mode (cloud, on-premises), organization size (large enterprises, SMEs), verticals (IT & ITeS, BFSI, healthcare, energy and utilities, and other verticals) 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 cybersecurity mesh market and sub-segments. It will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable

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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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