

Exposure Management Market by Component (Solutions and Services), Deployment Mode (Cloud and On-premises), Application (Vulnerability Management, Threat Intelligence, Attack Surface Management), End-user Industry and Region - Global Forecast to 2029

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Abstracts

The global Exposure Management market size is projected to grow from USD 2.2 billion in 2024 to USD 7.6 billion by 2029 at a CAGR of 28.3% during the forecast period. The market growth in exposure management is fueled by increased target-based cyber-attacks, protection of business assets from growing threats, rising IoT trends and the growing need for automated security solutions, growing awareness of cybersecurity hygiene, and complying with government regulations and requirements.

“By application, the attack surface management segment will grow at the highest CAGR during the forecast period.”

The attack surface management application of exposure management is expected to grow at the highest CAGR during the forecasted period due to the rapid evolution of digital infrastructures and the consequent expansion of potential cyberattack vectors. As organizations integrate advanced technologies, such as cloud computing, IoT devices, and remote work platforms, their attack surfaces become more complex and extensive. This complexity increases the difficulty of identifying and securing all possible points of vulnerability, making effective attack surface management essential for modern cybersecurity strategies. Moreover, the escalating frequency and sophistication of cyber threats demand more proactive and comprehensive approaches to vulnerability management. Attack surface management solutions address these needs by offering

detailed visibility into and control over an organization's digital footprint, enabling the early detection and mitigation of risks. The growing emphasis on cybersecurity hygiene, alongside tightening regulatory requirements for data protection and privacy, further underscores the importance of robust attack surface management, contributing to its rapid growth in the exposure management market.

“By end-user industry, the BFSI segment will grow at the largest market size during the forecast period.”

The BFSI industry is projected to have the largest market size in the exposure management market during the forecasted period, driven by its inherently high risk of cyber threats and the critical nature of the sensitive financial data it handles. The BFSI sector is a prime target for cybercriminals due to the valuable nature of financial information, necessitating robust cybersecurity measures to protect against data breaches, fraud, and financial loss. Additionally, the BFSI industry faces stringent regulatory and compliance requirements, compelling institutions to adopt comprehensive exposure management solutions to ensure data protection and maintain customer trust. The digital transformation within the BFSI sector, characterized by adopting online banking, mobile applications, and fintech innovations, further expands its attack surface, making effective exposure management crucial. The combination of these factors — the high value of assets, regulatory pressures, and expanding digital footprints — places a premium on advanced exposure management solutions, leading to significant market growth in the BFSI sector.

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

The Asia Pacific region is anticipated to exhibit the highest CAGR in the exposure management market, a trend driven by several factors. Rapid economic growth in the Asia Pacific region led to a surge in digital transformation across businesses and government sectors, significantly increasing the need for robust exposure management measures. The growth is accompanied by a substantial rise in internet usage and mobile connectivity, expanding the potential for cyber threats. Furthermore, countries in the Asia Pacific are progressively implementing stricter data protection regulations, pushing organizations to strengthen their exposure management infrastructure. Additionally, as key sectors like finance, healthcare, and retail increasingly embrace digital technologies, their vulnerability to cyberattacks grows, driving the demand for advanced solutions such as exposure management solutions. A combination of digital growth, regulatory changes, and heightened threat awareness contributes to the high

projected growth rate in the exposure management market in the Asia Pacific region.

Breakdown of primaries

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

The break-up of the primaries is as follows:

By Company Type: Tier 1 – 20%, Tier 2 – 57%, and Tier 3 – 33%

By Designation: C-level – 40%, Manager & Others – 60%

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

The key vendors in the global exposure management market include Tenable (US), CrowdStrike (US), Palo Alto Networks (US), Forescout (US), EY (UK), VIAVI (US), Verisk (US), IBM (US), eSentire (Canada), Mandiant (US), CyCognito (US), Censys (US), XM Cyber (Israel), Cymulate (Israel), Skybox Security (US), Armis (US), Picus Security (US), Adarma (Scotland), IONIX (Israel), Outpost24 (Sweden), ResilientX (UK), Ridge Security (US), Redhunt Labs (UK), Brandefense (US), and Risk Profiler (US).

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

Research Coverage

The report segments the exposure management market and forecasts its size by component (solution and services), deployment mode (on-premises and cloud), application (vulnerability management, threat intelligence, penetration testing, attack surface management, assets management, and other applications), end-user industry (BFSI, healthcare, retail & eCommerce, government, energy & utilities, IT & ITeS, and other industry), 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 exposure management market and the subsegments. The 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 (Rising cybersecurity threats and targeted attacks, Growth in digitalization and cloud adoption, Regulatory compliance and data protection laws, and Growing awareness of cybersecurity hygiene), restraints (Integration, compatibility issues, and user-friendliness and financial and talent barriers in deploying exposure management solutions), opportunities (Enhancing security with AI, ML, and automation in exposure management and Elevating exposure management through comprehensive education and certification programs), and challenges (Deploying and implementing exposure management solutions, Complexities of vendor overload and multiplicity of technologies, and Difficulties in addressing the complexity of advanced threats).

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

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Tenable (US), CrowdStrike (US), Palo Alto Networks (US), Forescout (US), EY (UK) among others in the exposure management market strategies.

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