

Hardware Security Modules Market by Deployment Type (Cloud, On-premise), Type (LAN Based /Network Attached, PCI Based/Embedded Plugins, USB Based/Portable, Smart Cards), Application, Vertical and Region - Global Forecast to 2028

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Abstracts

The hardware security modules market is projected to grow from USD 1.2 billion in 2023 and is projected to reach USD 2.3 billion by 2028; it is expected to grow at a CAGR of 13.5% from 2023 to 2028.

The growth of the hardware security modules market is driven by increasing data breaches and cyberattacks, need to follow stringent data security compliances, and emergence of digital transactions, electronic payments leading to rise in the need for protecting sensitive financial data. However, high ownership costs associated with hardware security modules is limiting the growth of the hardware security modules market.

“USB-based/portable HSMs to witness highest growth during the forecast period.”

The USB-based/portable hardware security modules segment is expected to witness the highest growth in the hardware security modules during the forecast period. This can be attributed to the rising demand for USB based HSMs among users due to its lower cost, compact size and portability features. The USB based modules are small and portable, therefore can be deployed for various functions including coding and signing, digital signatures, and secure key storage. It is capable of encryption and key protection and is ideally suited for off-line key generation for certificate authorities as well as development and Bring Your Own Device (BYOD) environments. These modules are preferred by all the industries as they offer superior security, cost-

efficiency, and ease of deployment. Hence, HSMs with USBs are widely used by governments and financial institutions to secure data, applications, and identities to reduce the chances of risk, and ensure regulatory compliance. Furthermore, USB connectivity makes such modules suitable for use with laptops, desktops and workstations. With the use of an integrated reader, these modules become ideal for situations with limited space or where they must be frequently used.

“Cloud deployment expected to exhibit higher growth compared to the on-premise segment during the forecast period.”

The cloud deployment segment is expected to exhibit higher growth compared to the on-premise segment during the forecast period. This mode has the ability to perform cryptographic operations and render absolute control over keys to customers through separation of duties. Moreover, the cloud-based HSMs allow users quick scalability by adding and removing hardware security module capacity on-demand, with no up-front costs. These HSMs are capable of generating their own encryption keys on the cloud. Cloud HSMs also provide flexibility to integrate with applications such as APIs, Java Cryptographic Extension and so on.

“Secure Sockets Layer (SSL) and Transport Layer Security (TLS) application segment to exhibit highest growth for the hardware security modules market during forecast period”

The Secure Sockets Layer (SSL) and Transport Layer Security (TLS) application segment is projected to grow at the highest CAGR of (15.7%) during the forecast period. HSMs are designed to create a secure boundary for cryptographic operations and communications. So, this feature is very useful in Secure On-board communication where communication between different components within an embedded system takes place (e.g., communication between sensors/actuators and Microprocessor). Majorly used Secure Communication Protocols: Secure Sockets Layer/Transport Layer Security (SSL/TLS), Internet Protocol Security (IPsec), Secure Shell (SSH), Secure/Multipurpose Internet Mail Extensions (S/MIME), Wi-Fi Protected Access 3 (WAP3). HSMs store and manage cryptographic keys used in SSL/TLS protocols. This includes private keys used for server authentication and digital signatures. The keys never leave the HSM, ensuring they are protected from unauthorized access. HSMs are designed to accelerate cryptographic operations, including the SSL/TLS handshake process. This can improve the overall performance of SSL/TLS connections.

“Asia Pacific to witness significant growth for the hardware security modules market

during the forecast period” Asia Pacific is expected to exhibit significant growth for the hardware security modules market during the forecast period. The presence of three of the top 10 largest economies in the world—China, India, and Japan, offers a high potential for market growth. There is an increasing demand for hardware security modules on account of rise in the number of manufacturers that have diversified business units. The countries in this region are notably contributing toward the growth of the market, as there is rapid adoption of hardware security modules by enterprises in the region. Thus, technology vendors across the region are coming up with HSM solutions for stopping card skimming and stealing identity activities. The continuously growing customer base of organizations in the region is fueling the growth of the Asia Pacific hardware security modules market.

Countries in Asia Pacific are considerably contributing toward the growth of the market, owing to the rapid adoption of hardware security modules by enterprises in the region.

In the process of determining and verifying the market size for several segments and subsegments gathered through secondary research, extensive primary interviews have been conducted with key industry experts in the hardware security modules space. The break-up of primary participants for the report has been shown below:

By Company Type: Tier 1 – 40%, Tier 2 – 40%, and Tier 3 – 20% By Designation: C-level Executives – 40%, Directors – 40%, and Others – 20% By Region: North America – 30%, Europe – 20%, Asia Pacific – 40%, and RoW – 10%

The report profiles key players in hardware security modules market with their respective market ranking analysis. Prominent players profiled in this report include Thales (France), Utimaco (Germany), International Business Machines Corporation (IBM) (US), STMicroelectronics (Switzerland), Microchip Technology (US), Infineon Technologies (Germany), Swift (US), Futurex (US), Atos SE (France), and Yubico (US), Securosys (Switzerland), SPYRUS (US), Ledger (France), Ultra Electronics (UK), AdwebTech (India), Efficient India (India), Lattice Semiconductor (US), Ellipticsecure (UK), Amazon Inc. (US), Entrust Security (US), ESCRYPT (Germany), Beijing Sansec Technology Development Co., Ltd (SANSEC) (China), Fortanix (US), JISA Softech (India), Microsoft (US), Nitrokey (Germany), Kryptoagile (India), and Kryptus (Brazil).

Research Coverage: This research report categorizes the hardware security modules market on the basis of deployment type, type, application, vertical and region. The report describes the major drivers, restraints, challenges, and opportunities pertaining to the hardware security modules market and forecasts the same till 2028. Apart from

these, the report also consists of leadership mapping and analysis of all the companies included in the hardware security modules market ecosystem.

Key Benefits of Buying the 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 hardware security modules 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 drivers, restraints, challenges, and opportunities. The report provides insights on the following pointers:

Analysis of key drivers (Increasing data breaches and cyberattacks, Need to follow stringent data security compliances, Need to effectively manage cryptographic keys, Emergence of digital transactions, electronic payments leading to rise in the need for protecting sensitive financial data), restraints (High ownership costs associated with hardware security modules, Susceptibility to cyberattacks and security breaches), opportunities (Augmented demand for data security in cloud environments, Increased adoption of connected devices and Internet of Things (IoT) technologies in smart cities, Proliferation of 5G networks worldwide, Rising adoption in the healthcare industry, Adoption of blockchain and cryptocurrencies) influencing the growth of the hardware security modules market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the hardware security modules market. Market Development: Comprehensive information about lucrative markets – the report analyses the hardware security modules market across varied regions

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

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Thales (France), Utimaco (Germany), International Business Machines Corporation (IBM) (US), Futurex

(US), Infineon Technologies (Germany), among others in the hardware security modules

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