

Managed Detection and Response (MDR) Market by Security Type (Network, Endpoint, Cloud), Deployment Mode (On-Premises and Cloud), Organization Size (SMEs and Large Enterprises), Vertical and Region - Global Forecast to 2028

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Abstracts

The global MDR market size is projected to grow from USD 3.3 billion in 2023 to USD 9.5 billion by 2028, at a Compound Annual Growth Rate (CAGR) of 23.3% during the forecast period. The MDR market is propelled by key factors that are shaping its growth trajectory. These include the increasing occurrence of business email compromise, ransomware, and crypto-jacking threats, which necessitate robust MDR solutions for effective defense. Furthermore, the industry's response to the scarcity of cybersecurity skills and the overwhelming volume of alerts has fueled the adoption of MDR services, providing organizations with the expertise and support needed to mitigate risks.

Government regulations mandating compliance have also driven the market, as organizations seek MDR solutions to meet security requirements. Additionally, the rapid proliferation of technology and the expanding penetration of IoT devices have created new avenues for cyber threats, further boosting the demand for MDR services as a proactive defense mechanism.

By vertical, the BFSI segment holds the largest market size

The BFSI segment asserts its dominance as the largest market size in the MDR landscape, owing to a multitude of compelling factors. Foremost, the BFSI industry handles copious volumes of highly valuable financial and customer data, making it an alluring target for malicious actors. Consequently, the imperative to fortify data protection fuels the demand for comprehensive MDR solutions within the sector.

Moreover, the BFSI domain is governed by rigorous regulatory frameworks and stringent compliance standards that mandate robust security measures and swift incident response capabilities, both of which are effectively catered to by MDR services. Furthermore, given the substantial financial repercussions of security breaches in the BFSI sector, the proactive threat detection and response capabilities offered by MDR solutions has become more imperative.

By security type, the cloud security segment registered the highest CAGR during the forecast period

The growth of cloud security can be attributed to the increasing adoption of cloud computing and the migration of critical business operations to cloud environments. Additionally, the need for robust security measures in cloud settings drives the demand for specialized MDR solutions. Furthermore, cloud environments' dynamic nature and the evolving threat landscape necessitate continuous monitoring and advanced threat detection and response capabilities provided by MDR services. Also, the emergence of sophisticated cloud-specific attacks further fuels the market's growth potential for cloud security in MDR. Thus, the cloud security segment accounts for the highest CAGR during the forecasted period.

By SME type, the medium-sized enterprise's segment is to grow at the largest market size during the forecast period

Medium-sized enterprises possess greater resources and financial capabilities, enabling them to invest in comprehensive cybersecurity solutions such as MDR services. Recognizing the criticality of safeguarding their valuable assets and sensitive data, medium-sized enterprises proactively seek MDR services to enhance their security posture. Additionally, their larger scale and operational complexity make them attractive targets for cyber threats, necessitating robust MDR solutions to mitigate risks effectively. The market leadership of medium-sized enterprises in the MDR domain reflects their commitment to proactive cybersecurity measures and their understanding of the value delivered by specialized MDR providers. Thus, medium-sized enterprises account for the largest market size during the forecasted period.

Breakdown of primaries

The study contains various industry experts' insights, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 40%, Tier 2 – 35%, and Tier 3 – 25%

By Designation: C-level – 43%, Directors – 33%, and Managers – 24%

By Region: North America – 35%, Europe – 30%, Asia Pacific – 25%, Middle East & Africa – 5%, Latin America – 5%

Major vendors in the global MDR market include CrowdStrike (US), Rapid7 (US), Red Canary (US), Arctic Wolf (US), Kudelski Security (Switzerland), SentinelOne (US), Proficio (US), Expel (US), Secureworks (US), Alert Logic (US), Trustwave (US), Mandiant (US), Binary Defense (US), Sophos (UK), eSentire (Canada), Deepwatch (US), Netsurion (US), GoSecure (US), LMNTRIX (US), UnderDefense (US), Ackcent (Spain), Cybereason (US), Critical Start (US), Cysiv (US), and Critical Insight (US).

The study includes an in-depth competitive analysis of the key players in the MDR market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the MDR market and forecasts its size by Security type (Endpoint security, Network security, Cloud security, and Other security types), Deployment mode (On-premises and Cloud), Organization size (SMEs and Large enterprises), Vertical (BFSI, IT and ITeS, Government and Defense, Energy and Utilities, Manufacturing, Healthcare, Retail and eCommerce, and other verticals), and region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

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 MDR 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 (Growing incidents of business email compromise, ransomware, and crypto-jacking threats and Addressing the gap in cybersecurity skills and overwhelming alert volumes), restraints (Lack of trust in third-party applications and Cost of MDR services to be an inhibitor for organizations), opportunities (Introduction of ML/AI-powered MDR services and Increasing adoption of MDR across SMEs), and challenges (Lack of modern IT infrastructure and Potential cyberattacks on MDR service provider's infrastructure)

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

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like CrowdStrike (US), Rapid7 (US), Red Canary (US), Arctic Wolf (US), Kudelski Security (Switzerland), among others in the MDR market strategies.

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