

Middle East Cybersecurity Market by Offering (Solutions and Services), Solution Type, Security Type, Deployment Mode (On-Premises, Cloud, Hybrid), Organization Size (Large Enterprises, SME), Vertical and Region - Global Forecast to 2028

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Abstracts

The Middle East cybersecurity market size is projected to grow from USD 14.8 billion in 2023 to USD 23.4 billion by 2028 at a Compound Annual Growth Rate (CAGR) of 9.6% during the forecast period. The Middle East cybersecurity market is expanding significantly, spurred by the transformative vision outlined in KSA Vision 2030. This ambitious initiative is a crucial driver, reshaping the regional landscape and influencing market dynamics. Complementing this vision is a burgeoning startup ecosystem in the Middle East, which is pivotal in steering the trajectory of cybersecurity innovations. As the region experiences rapid digital transformation, cloud technology is widely adopted by various initiatives. Concurrently, regulatory measures are evolving to address the dynamic threat environment, establishing a robust foundation for cybersecurity in the Middle East and fostering a secure digital future.

'By vertical, the BFSI segment accounts for a larger market share.'

The BFSI segment, comprising banks, financial institutions, and insurance entities, boasts the largest market size in the Middle East cybersecurity market due to several pivotal factors such as managing high-value assets like sensitive financial data is paramount for BFSI organizations, making them prime targets for cybercriminals. Substantial investments in cybersecurity solutions are imperative to safeguard customer information, payment details, and financial transactions. Moreover, stringent regulatory compliance requirements set by Middle Eastern authorities add to the urgency for robust cybersecurity measures.

The BFSI sector faces potential hefty fines and reputational damage for regulatory violations, emphasizing the need for continuous cybersecurity investments to demonstrate compliance. The sector's accelerated digitalization, including the rapid adoption of online banking, mobile banking, FinTech applications, and cloud services, further amplifies the demand for specialized cybersecurity solutions to protect against evolving cyber threats.

'Large enterprises account for a larger market share by organization size.'

Large enterprises dominate the Middle East cybersecurity market due to their substantial financial resources, enabling high spending capacity on advanced cybersecurity solutions. With larger budgets, they can afford to hire skilled professionals, deploy sophisticated technologies, and implement comprehensive security programs. This financial strength allows them to adopt a long-term approach to cybersecurity, ensuring consistent investments to build and maintain robust security postures against evolving threats. Moreover, large enterprises, often operating complex infrastructures and critical data centers, necessitate tailored cybersecurity solutions, driving increased spending in this sector. Protecting sensitive data, stringent compliance requirements, and the imperative of risk management further motivate large enterprises to invest significantly in cybersecurity. Additionally, large enterprises' centralized decision-making structures facilitate implementing and managing comprehensive cybersecurity programs, emphasizing operational efficiency and business continuity.

Breakdown of primaries

The study contains insights from various industry experts, 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 – 30%, and Tier 3 – 30%

By Designation: C-level – 40% and Managers and Others – 60%

By Region: UAE – 25%, KSA – 20%, Israel – 20%, Qatar – 10%, Egypt – 10%, and Rest of Middle East – 15%

Major vendors in the middle east cybersecurity market include IBM (US), Cisco (US), Palo Alto Networks (US), Check Point (US), Trend Micro (Japan), Fortinet (US),

Broadcom (US), Sophos (UK), Trellix (US), EDGE Group (UAE), SecureWorks (US), CPX (UAE), MDS UAE (UAE), Forescout (US), Protiviti (US), Mandiant (US), LogRhythm (US), Help AG (UAE), Moro Hub (UAE), DTS Solution (UAE), Ras Infotech (UAE), spiderSilk (UAE), CyberSec Consulting (US), CodeGreen Systems (UAE), Malwarebytes (US), Safe Decision (KSA), Security Matterz (KSA), Cato Networks (Israel), CyberGate Defense (UAE).

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

Research Coverage

The report segments the Middle East cybersecurity market. It forecasts its size by Offering (Solutions and Services), Solution Type (Identity & Access Management (IAM), Antivirus/Antimalware, Log Management & SIEM, Firewall, Encryption & Tokenization, Compliance & Policy Management, Patch Management and Other Solution Types), Security Type (Network Security, Endpoint & IoT Security, Cloud Security, and Application Security), Deployment Mode (On-premises, Cloud, and Hybrid), Organization Size (Large Enterprises, and Small and Medium Enterprises (SMEs)), Vertical (Government, Banking, Financial Services, and Insurance (BFSI), IT & ITeS, Healthcare & Lifescience, Aerospace & Defense, Retail & eCommerce, Manufacturing, Energy and Utilities, Telecommunication, Transportation & Logistics, Media & Entertainment, and Other Verticals) and Region (Middle East).

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 with information on the closest approximations of the revenue numbers for the overall Middle East cybersecurity 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 (digital transformation initiatives propel widespread cloud technological adoption, regulatory initiatives for evolving threat environment, KSA Vision 2030 driving Middle East cybersecurity market dynamics, and burgeoning startup ecosystem in the Middle East shaping trajectory), restraints (budgetary constraints on allocation of resources and resistance to emerging security technologies), opportunities (continuous investment by government and businesses for enhancement of cybersecurity infrastructure, rise in demand for cyber-insurance and awareness of cyber threats among companies, and robust development of cybersecurity services), and challenges (third-party dependencies expose weaknesses in middle east cybersecurity landscape and storage of skilled cybersecurity experts)

Product Development/Innovation: Detailed insights on upcoming technologies, research development activities, new products, and service launches in the Middle East cybersecurity market.

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players IBM (US), Cisco (US), Palo Alto Networks (US), Check Point (US), Trend Micro (Japan), among others, in the middle east cybersecurity market strategies.

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*Details on Business overview, Products/Services/Solutions offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

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