

# **Multi-cloud Security Market by Offering (Solution and Services), Cloud Model (IaaS, PaaS, and SaaS), Application (Network, Endpoint), Verticals (BFSI, Healthcare, IT and ITeS, Retail and eCommerce), Organization Size Region - Global Forecast to 2027**

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## **Abstracts**

The global multi-cloud security market is projected to grow from an estimated USD 4.4 billion in 2022 to USD 10.5 billion by 2027, at a Compound Annual Growth Rate (CAGR) of 18.7% from 2022 to 2027.

Some of the factors driving the market growth include implementation of stringent regulatory standards, and the requirement by organizations for a unified multi-cloud security solution. However, limited skilled expertise for deployment of multi-cloud security solutions is expected to hinder the market growth.

SMEs segment to grow at highest CAGR during the forecast period

According to the Organization for Economic Co-operation and Development (OECD), SMEs employ fewer than a given number of employees. This number varies across countries. The most frequent upper limit designating an SME is 250 employees in the European Union. However, some countries set the limit at 200 employees, while the US considers SMEs to include firms with fewer than 500 employees. SMEs are moving towards adopting multi-cloud security solutions and services. SMEs often possess limited budgets and a limited number of employees. Using more than one cloud vendor provides optimum security and disaster backup recovery. Data and workload can be maintained in different cloud platforms to maintain compliance with data security regulations. A major concern for SMEs is the cost of cloud services, and pricing is a major challenge. Although, with the adoption of multi-cloud security solutions, SMEs can

choose vendors with the best pricing based on requirements. The provisions of businesses are susceptible to change and need to be scalable. Using multi-cloud solutions allows companies to switch vendors and services as per requirements, thus giving SMEs the leverage to boost productivity and functionality. The multi-cloud deployment helps avoid vendor lock-in, evaluates the terms and conditions of each vendor cloud service, and supports profit gain. Moreover, cybercrimes are growing in sophistication, adding risk to the IT networks of enterprises. According to a report by CyberPeace Foundation, Cybersecurity for SMEs and startups, 43% of cyberattacks target small businesses. Multi-cloud security solutions help enhance the security infrastructure of SMEs, thereby driving the growth of this segment.

IaaS segment to hold the largest market size during forecast period

IaaS is a form of cloud computing where equipment is provided and managed by an external provider. The equipment and instruments in the cloud environment can include a variety, from virtual servers to network connections and load balancers. The virtualization of the hardware allows businesses to scale their IT solutions easily. Virtualization of hardware also additionally helps growing companies or those working on temporary projects with the ability to scale their businesses. IaaS delivers computing infrastructure as on-demand services. The user purchases servers or network equipment in this model and rents resources through a fully outsourced and on-demand service model. It enables scalability, and the resources are distributed as a service. Popular infrastructure services include Amazon's Elastic Compute, the Google Compute Engine, and Microsoft Azure. IaaS has become a target for cyberattacks attempting to hijack IaaS resources to launch denial-of-service attacks, run botnets, or mine cryptocurrencies. Attackers who successfully infiltrate an organizations' infrastructure resources, can leverage those accounts to access other parts of the enterprise architecture. The adoption of multi-cloud security solutions and services help create a secure environment.

Asia Pacific to grow at the highest CAGR during the forecast period

Asia Pacific is experiencing increasing digitalization in the recent years. According to the Asia Pacific Economic Cooperation, SMEs are the engines of growth in the Asia Pacific region. They contribute significantly to the economic growth. These firms are increasingly adopting multi cloud infrastructure for deploying their organizations' resources. The new age startups and unicorns across the region are focusing more on managing applications and product delivery. This factor has led to organizations moving towards serverless computing and cloud infrastructure. According to the multi-cloud

maturity index report, commissioned by VMware, 98% of respondents from India and Singapore reported that multi cloud had a positive impact on revenue growth, while 79% of those from Japan, mentioned the same. Several initiatives are being taken up by the governments and organizations in the region, related to cloud-based solutions. The region is also witnessing increasing cyberattacks. According to IBM global analysis, Asia is the most targeted region by cyberattacks, representing 26% of the attacks analyzed in 2021. Factors including increasing digitalization and growing cyberattacks are the major factors fueling the adoption of multi-cloud security solutions and services.

### 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 multi-cloud security market vendors include Microsoft (US), VMware (US), Rackspace (UK), Check Point (Israel), F5 (US), Amazon Web Services (US), Fujitsu (Japan), Entrust (US), Google Cloud (US), Cloudflare (US), IBM (US), Cloud4C (Singapore), Proofpoint (US), Lacework (US), BMC Software (US), SonicWall (US), Atos (France), Imperva (US), Micro Focus (UK), Aqua Security (Israel), Aviatix (US), Saviynt (US), Tufin (US), Distology (UK), Fortanix (US), Illumio (US), Fidelis Cybersecurity (US), Valtix (US), Orca Security (US), Ascend Technologies (US), Ermetic (US), Caveonix (US), and AccuKnox (US).

### Research Coverage

The report segments the multi-cloud security market and forecasts its size, by offering (solutions, services), cloud model (IaaS, PaaS, and SaaS), application (network security, application security, and endpoint and IoT security), verticals (BFSI, healthcare, IT &ITeS, retail and eCommerce, and others), organization size (large enterprises, SMEs), 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 multi-cloud security market and sub-segments. It 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 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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\*Details on Business overview, Products/Solutions/Services offered, Recent developments & MnM View might not be captured in case of unlisted companies.

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