

Penetration Testing Market by Offering (Solution, Services), Type (Web Applications, Mobile Applications, Network Infrastructure, Social Engineering, Cloud), Organization Size, Deployment Mode, Vertical and Region - Global Forecast to 2029

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Abstracts

The global penetration testing market is estimated to be valued at USD 1.7 billion in 2024 and is expected to grow to USD 3.9 billion by 2029, with a compound annual growth rate (CAGR) of 17.1%. The penetration testing market is witnessing significant growth due to escalating cyber threats, stricter regulations, and evolving business landscapes. With cyberattacks becoming more frequent and sophisticated, businesses are increasingly adopting proactive security measures like penetration testing to identify vulnerabilities. Stricter data privacy regulations globally mandate regular security assessments, driving market demand. The rapid adoption of cloud computing and IoT technologies creates new security challenges, further fueling the need for penetration testing—affordability and limited in-house expertise prompt SMEs to invest in penetration testing services tailored to their needs. Cloud-based solutions, automation, and the shift toward proactive security strategies are expected to sustain market growth.

'By offering, the services segment is expected to achieve a high growth rate during the forecast period.'

Many organizations back the growth of the penetration testing market by services and lack in-house expertise for comprehensive penetration testing, driving the demand for skilled professionals offered by service providers. Procuring services on a project basis proves more cost-effective for businesses, especially SMEs, than hiring dedicated personnel. Service providers provide scalability, flexibility, and compliance assurance, tailoring testing to suit specific needs and regulatory requirements. Moreover, in the

face of evolving cyber threats, service providers stay updated with the latest technologies and methodologies, ensuring effective testing against emerging risks. The shortage of skilled professionals further emphasizes the importance of outsourcing to specialized service providers, enabling businesses to focus on their core operations. The service segment's growth is propelled by the increasing demand for expertise, cost-effectiveness, and staying ahead of evolving threats, making partnerships with experienced providers essential for maintaining a robust security posture.

'By deployment mode, the cloud segment is expected to achieve a high growth rate during the forecast period.'

The cloud-based segment is poised to grow at a higher growth rate in the penetration testing market due to its scalability, cost-effectiveness, and global accessibility. Cloud solutions offer efficient testing from any location by eliminating the need for hardware and software investments. Moreover, businesses benefit from access to skilled penetration testing teams provided by cloud service providers and seamless integration with existing cloud security tools. These solutions address evolving cloud security challenges while emphasizing automation and regulatory compliance. With businesses increasingly adopting cloud technologies, cloud-based penetration testing is expected to experience significant growth, meeting the demands of a rapidly evolving cybersecurity landscape.

'The North America region will dominate the penetration testing market during the forecast period.'

North America is positioned to hold a significant share and experience substantial growth in the future penetration testing market. This is attributed to several key factors: North America is a tech hub with early adopters, driving widespread cloud adoption and necessitating robust penetration testing to address unique security challenges. The stringent regulations such as HIPAA and PCI DSS mandate regular security assessments, fueling demand for proactive security measures. Other contributing factors include high disposable income, a well-established pool of cybersecurity professionals, and a focus on innovation in cybersecurity solutions. With a focus on cloud adoption, evolving threats, and demand from SMEs, North America's penetration testing market is expected to witness significant growth. Despite competition and emphasis on automation, North America's robust technology and data security foundation positions it as a global penetration testing market leader.

Breakdown of primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The breakdown of the primaries is as follows:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

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

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

The major players in the penetration testing market are Rapid7(US), Secureworks(US), Synopsys(US), CrowdStrike(US), IBM(US), Coalfire Labs(US), Indium Software(US), Cigniti Technologies(US), Trustwave(US), Cisco Systems(US), Fortinet(US), Bugcrowd(US), Invicti(US), Hackerone(US), Raxis(US), Rsi Security(US), Rhino Security Labs(US), Sciencesoft(US), Portswigger(US), Netraguard(US), Software Secured(Canada), Vumentric Cybersecurity(Canada), Netitude(UK), Zimperium(US), Nowsecure(US), Security Metrics(US), NetSpi(US), Covertswarm(UK), Holm Security(Sweden), Intruder Systems(UK), Breachlock(US), Isecurion(India), Redbot Security(US). The study includes an in-depth competitive analysis of these key players in the penetration testing market, with their company profiles, recent developments, and key market strategies.

Research Coverage

The research encompasses the penetration testing market's size across various segments. It seeks to gauge its market size and growth potential within different categories by offering sub-types, organization sizes, deployment modes, verticals, and regions. Additionally, the study provides a comprehensive competitive analysis of major market players, delving into their company profiles, significant observations regarding product and business offerings, recent advancements, and key market strategies.

Reasons to buy this report

The report aims to assist market leaders and new entrants by providing near-accurate revenue estimates for the overall penetration testing market and its subsegments. It offers insights into the competitive landscape, enabling stakeholders to gain a deeper understanding and better position their businesses while also aiding in developing appropriate go-to-market strategies. Furthermore, the report aids stakeholders in

grasping the market dynamics, offering information on significant market drivers, constraints, challenges, and opportunities.

The report provides insights on the following pointers:

The report offers insights into various aspects: As businesses increasingly recognize the critical importance of penetration testing, there is a growing demand for comprehensive solutions and services in this domain. These encompass a range of tools that enable organizations to achieve secure and authentic connectivity. While challenges such as the need for alignment and technology integration are acknowledged, the report emphasizes the dynamic nature of penetration testing technologies and evolving market trends. Additionally, it provides valuable insights into the future direction of the penetration testing market.

Product Development/Innovation: The report provides detailed insights into emerging technologies, research and development activities, and product and solution launches within the penetration testing market.

Market Development: The report offers extensive details regarding profitable markets, analyzing the penetration testing market across diverse regions.

Market Diversification: The report provides thorough information on newly developed products and solutions, unexplored geographical areas, recent advancements, and investments in the penetration testing market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Rapid7(US), Secureworks(US), Synopsys(US), CrowdStrike(US), IBM(US), Coalfire Labs(US), Indium Software(US), Cigniti Technologies(US), Trustwave(US), Cisco Systems(US), Fortinet(US), Bugcrowd(US), Invicti(US), Hackerone(US), Raxis(US), Rsi Security(US), Rhino Security Labs(US), Sciencesoft(US), Portswigger(US), Netraguard(US), Software Secured(Canada), Vumentric Cybersecurity(Canada), Netitude(UK), Zimperium(US), Nowsecure(US), Security Metrics(US), NetSpi(US), Covertswarm(UK), Holm Security(Sweden), Intruder Systems(UK), Breachlock(US), Isecurion(India), Redbot Security(US).

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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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