

Zero Trust Network Access (ZTNA) Market by Solution (Agent-based, Agentless, Universal) and Application Area (Remote Workforce Access, Third-party & BYOD Access, Private Application Access, Workload-to-Workload & API Access) - Global Forecast to 2030

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Abstracts

The global zero trust network access (ZTNA) market size is projected to grow from 1.34 billion in 2025 to USD 4.18 billion by 2030 at a CAGR of 25.5% during the forecast period. As organizations adopt remote work and cloud-based applications, securing access to critical resources has become a top priority. They want to ensure only authorized users can access sensitive data and systems. Zero trust network access (ZTNA) solutions are crucial in addressing these security concerns. ZTNA also helps to reduce the risk of unauthorized access and potential data breaches. Cyberattacks, such as phishing, ransomware, or insider threats, can lead to significant financial and reputational damage for organizations. However, the limited compatibility of ZTNA solutions with legacy applications and traditional on-premises infrastructure. Many organizations, especially in manufacturing, government, and healthcare, still rely on outdated legacy systems that were not designed for modern, identity-centric security frameworks.

“By offering, the services segment will account for the highest CAGR during the forecast period”

The services segment is witnessing rapid growth in the ZTNA market as organizations increasingly seek expert support for deploying, managing, and optimizing Zero Trust architectures. With the rising complexity of IT environments and the growing need for secure remote access, enterprises are turning to professional services to ensure seamless implementation and continuous monitoring. These services enable

organizations to benefit from expert guidance, faster incident response, and ongoing optimization, helping maintain a robust security posture while minimizing operational challenges.

“By application area, the remote workforce access segment will hold the largest market share during the forecast period”

The remote workforce access segment is experiencing significant growth in the ZTNA market as organizations increasingly support distributed teams and cloud-based operations. With employees accessing corporate resources from diverse locations and devices, businesses prioritize secure, seamless connectivity to protect sensitive data. ZTNA solutions provide granular, identity-based access control, reducing the risk of unauthorized access and data breaches. This capability enables organizations to maintain productivity while ensuring compliance and security, driving the widespread adoption of ZTNA for remote workforce access.

“North America is expected to hold the largest market share, while Asia Pacific is expected to witness the fastest growth during the forecast period”

North America continues to dominate the ZTNA landscape due to its concentration of digitally advanced enterprises, widespread remote and hybrid work adoption, and early integration of ZTNA into broader Secure Service Edge (SSE) and Secure Access Service Edge (SASE) frameworks. In the US and Canada, Organizations in various industries are encountering significant challenges due to legacy VPN limitations, compliance demands, and evolving cyber threats. These factors are driving a transition toward Zero Trust Network Access (ZTNA) solutions that offer continuous, secure access based on identity and context, thus leading to a strong uptake of standalone ZTNA offerings and integrated ZTNA capabilities delivered through cloud-native platforms.

Meanwhile, the Asia Pacific (APAC) region is projected to grow at the highest CAGR during the forecast period. Growth is fueled by rapid cloud adoption, rising cyber incidents, and government-backed digital transformation initiatives across India, China, Japan, and Southeast Asia. Many SMEs and mid-sized enterprises in the region are adopting ZTNA as a cost-effective alternative to VPNs, enabling secure remote access without heavy infrastructure investments. Government mandates on zero trust adoption and an expanding base of mobile-first and remote workforces are further accelerating ZTNA deployment across Asia Pacific.

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 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C-level – 40%, Managerial & Other Levels – 60%

By Region: North America – 50%, Europe – 20%, Asia Pacific – 20%, Rest of the World – 10%

The key players in the ZTNA market include Palo Alto Networks (US), Zscaler (US), Cloudflare (US), Microsoft (US), Check Point (Israel), Teleport (US), Cisco (US), Fortinet (US), Ivanti (US), Forcepoint (US), Netskope (US), iboss (US), Appgate (US), Lookout (US), Broadcom (US), Citrix (US), Sophos (UK), Akamai (US), Menlo Security (US), SonicWall (US), Cloudbrink (US), Versa Networks (US), NetFoundry (US), Jamf (US), DefensX (US), Alkira (US), Xage Security (US), Hillstone Networks (US), Systancia (France), and Accops (India). The study includes an in-depth competitive analysis of the key players in the ZTNA market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the ZTNA market and forecasts its size by Solutions (agent-based ZTNA, agentless ZTNA, universal ZTNA), Services (professional services, managed services), Deployment Mode (cloud-delivered, hybrid), by Organization Size (large enterprises, small and medium enterprises (SMEs)), Application Area (remote workforce access, third-party/contractor & BYOD access, privileged/administrative access, SAAS application access control, private application access, workload-to-workload & API/microservices access), Vertical (banking, financial services, and insurance (BFSI), government & public sector, retail & ecommerce, IT & ITeS, healthcare, education, manufacturing, other verticals (telecommunications, energy & utilities, travel & hospitality, and media & entertainment), 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 market leaders and new entrants with information on the closest approximations of the revenue numbers for the overall ZTNA market and the subsegments. It will also 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 into the following pointers:

Analysis of key drivers (Growing need for secure remote access in hybrid and remote work environments, Integration into broader Secure Access Service Edge (SASE) platforms, Growing adoption of cloud-native environments, Increasing sophistication of targeted attacks on internal applications), restraints (High initial cost and skills gap in implementing ZTNA solutions, Compatibility issues with legacy applications and on-premises infrastructure, Complexity of policy configuration and identity management at scale), opportunities (Convergence of ZTNA with AI/ML for adaptive trust evaluation, Growth in industry-specific ZTNA solutions, Increasing investment from enterprises to replace aging VPN infrastructure) and challenges (User experience friction during continuous authentication, Visibility gaps across multi-cloud environments, Insider risk and policy complexity undermining ZTNA effectiveness, Platform lock-in and integration challenges in ZTNA deployments).

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

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Palo Alto Networks (US), Zscaler (US), Cloudflare (US), Microsoft (US), Check Point (Israel), Teleport (US), Cisco (US), Fortinet (US), Ivanti (US), Forcepoint (US), Netskope (US), iboss (US), Appgate (US), Lookout (US), Broadcom (US), Citrix (US), Sophos (UK), Akamai (US), Menlo Security (US), SonicWall (US), Cloudbrink (US), Versa Networks (US), NetFoundry (US), Jamf (US), DefensX (US), Alkira (US), Xage Security (US), Hillstone Networks (US), Systancia (France), and Accops (India) in the ZTNA market.

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