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Data Center Logical Security Market Forecasts to 2030 – Global Analysis By Solution Type (Identity & Access Management (IAM), Encryption, Firewall & Antivirus, Intrusion Prevention Systems (IPS), Network Security, Security Information and Event Management (SIEM), Data Loss Prevention (DLP) and Other Solution Types), Security Type, Deployment Type, Threat Type, Data Center Type, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Data Center Logical Security Market is accounted for $5.03 billion in 2024 and is expected to reach $8.68 billion by 2030 growing at a CAGR of 9.5% during the forecast period. Data Center Logical Security is a set of policies and technologies designed to safeguard data and systems within a data center from unauthorized access, data breaches, and cyber threats. It focuses on the digital and virtual aspects of the data center environment, implementing layers of security controls such as user authentication, access management, encryption, and intrusion detection systems (IDS). Key features include multi-factor authentication, role-based access control, encryption of data at rest and in transit, firewalls, IDS, and intrusion prevention systems, and regular security audits, vulnerability assessments, and patch management practices to ensure software and hardware are up-to-date and free from security flaws.

According to a recent cyber security firm Cyble Research Labs analysis, over 20,000 web instances of various data center management and monitoring products, ranging from intelligent monitoring software to thermal cooling management control systems, are accessible to online hackers.

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Market Dynamics:

Driver:

Increasing frequency and sophistication of cyberattacks

Cyberattacks are becoming more complex, with attackers using advanced techniques like AI-powered malware and zero-day exploits. Traditional security measures are often inadequate, leading businesses to adopt AI-driven and machine learning-based solutions. These solutions can detect and respond to evolving threats in real-time. Thus the rise in sophisticated cyberattacks necessitates a multi-layered security approach in data centers, including firewalls, encryption, intrusion detection systems, intrusion prevention systems, and advanced threat analytics tools, driving the growth of the data center logical security Market.

Restraint:

High implementation costs

Advanced data center logical security requires significant capital expenditure (CapEx) for hardware, software, and security tools, as well as operational expenses (OpEx) for system maintenance, updates, patch management, and employee training. These costs can be particularly burdensome for companies without dedicated security budgets. The integration of new security technologies into existing infrastructure can also involve hidden costs, such as system downtime, testing, and IT staff training hampering the market growth.

Opportunity:

Shift towards cloud computing environments & remote working models

Organizations are shifting their operations to the cloud, introducing new challenges in securing digital assets. Cloud environments are dynamic, often spread across multiple regions and providers, and rely heavily on the internet, exposing them to a wider range of cyber threats. Virtualized environments in cloud data centers allow rapid provisioning and scaling of resources, but also create vulnerabilities that can be exploited by cybercriminals. Robust security measures, such as hypervisor-level security, network segmentation, and endpoint protection, are needed to ensure the logical security of

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cloud-based environments is on par with traditional data centers.

Threat:

Lack of skilled workforce

Modern data center security solutions often involve complex technologies like intrusion detection systems, SIEM, encryption, and advanced firewalls. These require skilled professionals to configure, integrate, and maintain effectively. A lack of skilled workforce makes it difficult for organizations to deploy and manage these tools efficiently, leaving them vulnerable to security breaches. Additionally, underutilization of these tools can result from incorrect configuration, undermining the effectiveness of the security infrastructure and making it easier for cybercriminals to exploit vulnerabilities.

Covid-19 Impact

The COVID-19 pandemic significantly impacted the Data Center Logical Security Market, accelerating the shift to remote work and cloud computing. However, financial constraints and disrupted supply chains delayed investments in security infrastructure. The surge in cyberattacks, including phishing and ransomware, further underscored the need for enhanced logical security. As businesses adapted to new working models, the market saw a growing focus on secure remote access and cloud-based security solutions.

The identity & access management (IAM) segment is expected to be the largest during the forecast period

The identity & access management (IAM) segment is expected to be the largest share during the forecast period because these systems protect data and resources within data centers by limiting access to only authorized users through strict access controls and multi-factor authentication. They also help mitigate common cyber threats like phishing, credential theft, and privilege escalation by implementing robust authentication mechanisms and limiting user permissions based on roles or tasks, thereby strengthening data center security.

The enterprise data centers segment is expected to have the highest CAGR during the forecast period

The enterprise data centers segment is anticipated to have the highest CAGR during

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the forecast period owing to the critical information like financial records, intellectual property, and customer data from breaches, ransomware, and unauthorized access. This necessitates robust security solutions like encryption, IAM, firewalls, and intrusion detection systems. The increasing frequency and sophistication of cyberattacks are driving enterprises to invest in behavioral analytics, machine learning-based threat detection, and automated response systems to mitigate risks.

Region with largest share:

North America is anticipated to hold the largest market share during the forecast period due to rise in cloud computing adoption in North America has heightened the need for secure data centers. Businesses are embracing cloud computing for its flexibility, scalability, and cost efficiency. However, this also increases the risk of cyberattacks due to the larger attack surface. As a result, there is a growing demand for logical security solutions like encryption and multi-factor authentication.

Region with highest CAGR:

Asia Pacific is predicted to hold the highest CAGR over the forecast period owing to businesses shifting their data and operations to the cloud for scalability, flexibility, and cost-efficiency. However, this shift also raises the risk of cyberattacks and data breaches. Organizations are seeking robust data center logical security solutions and encryption to protect their cloud environments. Economic growth in emerging markets like China, India, and Southeast Asia has driven significant investments in IT infrastructure, including data centers, requiring stringent logical security measures to protect sensitive data and maintain regulatory compliance.

Key players in the market

Some of the key players in Data Center Logical Security market include Cisco Systems, Fortinet, Palo Alto Networks, Check Point Software Technologies, IBM Security, McAfee, Juniper Networks, Hewlett Packard Enterprise (HPE), Microsoft, Amazon Web Services (AWS), F5 Networks, Imperva, Raytheon Technologies, AT&T Cybersecurity and Symantec.

Key Developments:

In November 2024, Cisco and NTT DATA partnered to empower global mobile workforce with simplified access to 5g connectivity. As demand for flexible and cost-

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effective connectivity surges, Cisco and NTT DATA are responding with a unified solution backed by world-class support services from both companies.

In November 2024, HPE announced key advancements on HPE GreenLake cloud that include simplifying hybrid infrastructure, data, and applications on a unified platform. Our award-winning HPE Partner Ready Vantage program meets partners wherever they are on their as-a-service journey and provides growth opportunities.

In November 2024, Cisco introduced intelligent, secure and assured wi-fi 7 to transform employee and customer experiences. New AI-native wireless is location-aware, instantly adapts to any environment and continuously optimizes—with the power of Cisco Spaces built in to create smart workplaces.

Solution Types Covered:

- Identity & Access Management (IAM)
- Encryption
- Firewall & Antivirus
- Intrusion Prevention Systems (IPS)
- Network Security
- Security Information and Event Management (SIEM)
- Data Loss Prevention (DLP)
- Other Solution Types

Security Types Covered:

- Physical Security
- Operational Security
- Information Security

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Deployment Types Covered:

- On-premises
- Cloud-based
- Hybrid

Threat Types Covered:

- Cyberattacks
- Insider Threats
- Phishing & Social Engineering
- Data Breaches
- Network Vulnerabilities

Data Center Types Covered:

- Enterprise Data Centers
- Cloud Data Centers
- Colocation Data Centers
- Edge Data Centers
- Hyperscale Data Centers

End Users Covered:

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- Telecommunications
- Healthcare
- Financial Services
- IT and Telecommunications
- Retail
- Government
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe

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- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

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What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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