

# **Advanced Persistent Threat Protection (APTP) Market – Global Industry Size, Share, Trends, Opportunity, and Forecast By Offering (Solution (Security Information and Event Management (SIEM), Sandboxing, End Point Protection, Intrusion Detection System/ Intrusion Prevention System (IDS/IPS), Next-Generation Firewall (NGFW), Forensic Analysis, Others), Service (Integration & Deployment, Support & Maintenance, Consulting), By Deployment Mode (On-Premises, Cloud), By Organization Size (Large Enterprises, Small & Medium Enterprises), By End User (IT & Telecom, BFSI, Healthcare, Retail & Ecommerce, Construction & Engineering, Energy & Utility and Others), By Region, Competition, 2018-2028**

<https://marketpublishers.com/r/A951103808BAEN.html>

Date: November 2023

Pages: 189

Price: US\$ 4,900.00 (Single User License)

ID: A951103808BAEN

## **Abstracts**

The global advanced persistent threat protection (APTP) market is poised to reach a projected market size of USD 8.92 billion by the conclusion of 2022, with a compound annual growth rate (CAGR) of 22.67% anticipated during the forecast period. Situated within the cybersecurity realm, the global advanced persistent threat protection (APTP) market holds a pivotal role in countering sophisticated and unyielding cyber threats. These APTP solutions are meticulously crafted to thwart advanced persistent threats (APTs), which relentlessly target organizations with the aim of gaining unauthorized access and maintaining a surreptitious presence for nefarious purposes. The market's

significance has surged in response to the escalating complexity and frequency of cyberattacks. APTP solutions harness state-of-the-art technologies such as threat intelligence, behavioral analytics, machine learning, and artificial intelligence (AI) to proficiently detect and mitigate APTs. Organizations spanning various industries now acknowledge the imperative requirement for APTP solutions to safeguard their invaluable data, preserve their reputation, and ensure uninterrupted operations in the face of continually evolving cyber threats. The APTP market is propelled by several driving forces, including the expanding digitization of industries, the implementation of regulatory compliance mandates, and the perpetual need for innovation to stay one step ahead of the ever-evolving threat landscape.

## Key Market Drivers

### The Escalating Sophistication and Frequency of Advanced Persistent Threats (APTs)

The global advanced persistent threat protection (APTP) market is being driven by the escalating sophistication and frequency of Advanced Persistent Threats (APTs). APTs represent a significant challenge for organizations, as cyber adversaries employ highly advanced techniques to infiltrate networks, gain unauthorized access, and remain undetected for prolonged periods. These persistent attacks target valuable data, intellectual property, and sensitive information, posing a severe risk to businesses, governments, and critical infrastructure. As APTs become increasingly complex and stealthy, the demand for robust APTP solutions has surged.

Organizations recognize the need for proactive defenses against APTs that can swiftly detect, analyze, and mitigate these evolving threats. APTP solutions leverage advanced technologies such as behavioral analytics, threat intelligence, machine learning, and artificial intelligence to identify anomalies, suspicious activities, and deviations from normal behavior. This proactive approach empowers security teams to respond effectively, isolating, and neutralizing APTs before they can cause significant damage. With the APT landscape evolving continuously, the APTP market is poised to witness significant growth as enterprises across industries prioritize bolstering their cybersecurity posture to defend against the relentless onslaught of sophisticated APTs.

### The Rapid Expansion of Digitization Across Various Industries

The rapid expansion of digitization across various industries is propelling the global advanced persistent threat protection (APTP) market. As industries embrace digital transformation to optimize processes, enhance customer experiences, and achieve

operational efficiency, they also become more susceptible to cyber threats, including advanced persistent threats (APTs). The increased use of interconnected devices, cloud services, and data-sharing platforms widens the attack surface for cybercriminals to exploit vulnerabilities and infiltrate networks.

To counter this growing threat landscape, organizations are investing in APTP solutions that offer comprehensive protection against sophisticated attacks. These solutions provide advanced threat detection, continuous monitoring, and real-time response capabilities to identify and neutralize APTs before they can cause significant damage. The need for APTP solutions is particularly pronounced in sectors such as finance, healthcare, energy, and critical infrastructure, where the potential impact of APTs can be devastating. By adopting APTP solutions, industries can ensure the security of their digital assets, safeguard sensitive information, and maintain the trust of customers and partners. As the digital footprint of organizations continues to expand, the demand for robust APTP solutions is set to grow, driving innovation in the cybersecurity sector, and propelling the global APTP market forward.

**The Adoption of Technologies like Cloud Computing, IoT, and Remote Work** The adoption of technologies like cloud computing, IoT (Internet of Things), and remote work is propelling the global advanced persistent threat protection (APTP) market. While these technologies offer numerous benefits in terms of efficiency and connectivity, they also introduce new attack vectors that cybercriminals can exploit. Cloud services and IoT devices create additional points of entry for advanced persistent threats (APTs), as they are often interconnected and remotely accessible. Additionally, the rise of remote work has expanded the attack surface, with employees accessing company resources from various locations and devices.

To address these evolving challenges, organizations are turning to APTP solutions that provide holistic protection against sophisticated threats. These solutions combine threat intelligence, behavior analytics, and real-time monitoring to detect and respond to APTs effectively. As industries increasingly rely on cloud-based infrastructures, connected devices, and remote work arrangements, the demand for robust APTP solutions is anticipated to rise, driving innovation and growth in the global APTP market.

**The Continuous Collaboration between Cybersecurity Vendors and Organizations to Develop Effective and Adaptive APTP Solutions**

The continuous collaboration between cybersecurity vendors and organizations to develop effective and adaptive advanced persistent threat protection (APTP) solutions

is propelling the global APTP market. In the face of ever evolving and sophisticated APTs, cybersecurity vendors are partnering closely with businesses to understand their unique security challenges and develop tailored solutions. This collaboration allows for the creation of robust APTP solutions that can adapt to changing threat landscapes, ensuring organizations stay ahead of cyber adversaries.

These partnerships facilitate the integration of cutting-edge technologies such as artificial intelligence, machine learning, and behavioral analytics into APTP solutions. By combining the expertise of cybersecurity vendors with the insights and needs of organizations, APTP solutions are becoming more agile, proactive, and capable of detecting and mitigating APTs in real-time. As a result, the global APTP market is experiencing growth, with businesses recognizing the value of collaborative efforts in building resilient defenses against persistent and advanced cyber threats.

## Key Market Challenges

### Rapidly Evolving Threat Landscape

The rapidly evolving threat landscape is hampering the global advanced persistent threat protection (APTP) market. As cyber threats become more sophisticated and dynamic, traditional security measures struggle to keep pace. APTP solutions are designed to detect and counter advanced and persistent threats, but the ever-changing tactics and techniques employed by threat actors challenge their effectiveness. Cybercriminals are constantly developing new methods to breach defenses, exploit vulnerabilities, and remain undetected.

This evolving threat landscape necessitates continuous innovation in APTP solutions to stay ahead of emerging threats. The APTP market must adapt and offer advanced features such as real-time threat intelligence, machine learning, and behavioral analysis to effectively identify and respond to new attack vectors. Additionally, the unpredictability of the threat landscape requires organizations to adopt a proactive security approach that combines prevention, detection, and response capabilities. As a result, the APTP market faces the ongoing challenge of delivering solutions that can counter the evolving tactics and techniques of modern cyber threats.

### Complexity of Networks

The complexity of networks is hampering the global advanced persistent threat protection (APTP) market. With the expansion of digital infrastructures, organizations'

networks have become intricate, incorporating various devices, endpoints, and cloud services. This complexity creates challenges for APTP solutions, as they need to effectively monitor and secure a diverse and interconnected environment. As network architectures evolve, ensuring comprehensive visibility and threat detection across all components becomes increasingly difficult.

The intricate nature of modern networks can lead to blind spots and gaps in security coverage, allowing advanced threats to go unnoticed. APTP solutions must navigate through intricate network topologies, varying access points, and diverse data flows to identify anomalies and potential breaches. Organizations need APTP solutions that can adapt to the intricate nature of their networks, provide continuous monitoring, and offer holistic threat detection mechanisms. Addressing the complexity of networks is essential to the success of APTP solutions in safeguarding organizations from advanced and persistent threats in today's intricate digital landscape.

## Key Market Trends

### The Increasingly Integration with Endpoint Detection and Response Platforms

The increasing integration with endpoint detection and response (EDR) platforms is propelling the global Advanced Persistent Threat Protection (APTP) market forward. As organizations face a complex threat landscape, the collaboration between APTP and EDR solutions offers a synergistic approach to threat detection and response. The integration enables seamless sharing of threat intelligence, enhancing the ability to identify advanced persistent threats across endpoints and network environments.

By leveraging the strengths of both APTP and EDR technologies, organizations can achieve a more comprehensive and proactive defense posture. APTP solutions focus on identifying sophisticated, persistent threats, while EDR platforms excel in monitoring and responding to endpoint-level threats and anomalies. The integration empowers security teams to swiftly detect and mitigate threats, improving overall incident response times and reducing the potential impact of attacks. This integration trend is gaining momentum as businesses recognize the need for a unified approach to cybersecurity. It not only streamlines security operations but also enhances the accuracy of threat detection by providing a broader context for understanding the threat landscape. As a result, the global APTP market is expected to experience growth due to the strategic partnership between APTP and EDR technologies.

### The Growing Focus on Insider Threats

The growing focus on insider threats is propelling the global Advanced Persistent Threat Protection (APTP) market. Organizations are increasingly acknowledging that malicious activities initiated from within their own ranks can be just as detrimental as external threats. Insider threats, whether they result from unintentional negligence or deliberate intent, pose significant risks to sensitive data and critical infrastructure. As a response, businesses are recognizing the need for advanced security measures that encompass insider threat detection and prevention.

The APTP market is evolving to address this shift in focus, offering solutions that not only safeguard against external advanced persistent threats but also provide capabilities to monitor, detect, and mitigate insider threats effectively. These solutions often incorporate behaviour analytics, anomaly detection, and user activity monitoring to identify unusual patterns or deviations in employee behaviour that may indicate insider threats. With organizations investing in comprehensive security strategies to combat both internal and external threats, the APTP market is experiencing growth as it adapts to the changing threat landscape and the increasing importance of safeguarding against insider risks.

### Segmental Insights

#### Deployment Mode Insights

Based on deployment mode, the cloud deployment model emerges as the predominant segment, exhibiting unwavering dominance projected throughout the forecast period. The increasing adoption of cloud services offers several advantages, such as scalability, accessibility, and cost-effectiveness. As organizations increasingly migrate to cloud-based infrastructures, the demand for cloud-based APTP solutions is growing. Cloud deployment allows for faster implementation, seamless updates, and the ability to adapt to evolving threat landscapes more efficiently. Additionally, cloud solutions facilitate remote monitoring and management, which is crucial for securing distributed and remote work environments. With the cloud deployment model offering enhanced flexibility and agility, organizations are embracing cloud based APTP solutions to effectively safeguard their networks and data against advanced persistent threats. This trend is driving the dominance of the cloud segment within the global APTP market.

#### End User Insights

Based on end user, the BFSI segment emerges as a formidable frontrunner, exerting its

dominance and shaping the market's trajectory throughout the forecast period. This prominence of the BFSI sector can be attributed to the sector's intrinsic vulnerability to cyber threats due to its critical role in managing financial transactions and sensitive customer data. As financial institutions continuously digitize their operations, safeguarding against advanced persistent threats becomes paramount. The BFSI segment's commitment to fortifying its cybersecurity measures bolsters the adoption of APTP solutions, positioning it as a driving force in shaping the market landscape as it addresses the evolving complexities of the digital threat landscape.

## Regional Insights

North America emerges as a prominent and influential stronghold within the global advanced persistent threat protection (APTP) market, propelled by a confluence of strategic factors that collectively underscore its pivotal role in shaping the industry's growth trajectory. With a robust technological ecosystem, extensive adoption of digital solutions, and a complex cyber threat landscape, North America has become a focal point for APTP solutions. The region's organizations are keenly aware of the evolving nature of cyber threats and the potential impact on critical assets, data, and operations. Consequently, they are investing substantially in advanced cybersecurity measures, including APTP solutions, to mitigate risks and bolster their defenses against persistent and sophisticated threats. The strong emphasis on cybersecurity regulations, continuous technological innovation, and collaboration among cybersecurity experts further solidify North America's position as a leader in the APTP market, influencing trends and advancements that resonate globally.

## Key Market Players

Cisco Systems, Inc.

Microsoft Corporation

Broadcom, Inc.

VMware, Inc.

Kaspersky Labs

F-Secure Corporation

Forcepoint Cyber Holdings, Inc.

CyberArk Software Ltd.

Red Sift Limited

International Business Machines Corporation

### Report Scope:

In this report, the global advanced persistent threat protection (APT) market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Advanced Persistent Threat Protection (APT) Market, By Offering:

Solution

Security Information and Event Management (SIEM)

Sandboxing

End Point Protection

Intrusion Detection System/ Intrusion Prevention System (IDS/IPS)

Next-Generation Firewall (NGFW)

Forensic Analysis

Others

Service

Integration & Deployment

Support & Maintenance



Consulting

Global Advanced Persistent Threat Protection (APTP) Market, By Deployment Mode:

On-Premises

Cloud

Global Advanced Persistent Threat Protection (APTP) Market, By Organization Size:

Large Enterprises

Small & Medium Enterprises

Global Advanced Persistent Threat Protection (APTP) Market, By End User:

IT & Telecom

BFSI

Healthcare

Retail & Ecommerce

Construction & Engineering

Energy & Utility

Others

Global Advanced Persistent Threat Protection (APTP) Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

### Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global advanced persistent threat protection (APTP) Market.

### Available Customizations:

Global Advanced Persistent Threat Protection (APTP) market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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15.1.1. Business Overview

15.1.2. Key Financials & Revenue

15.1.3. Key Contact Person

15.1.4. Headquarters Address

15.1.5. Key Product/Service Offered

15.2. Microsoft Corporation

15.2.1. Business Overview

15.2.2. Key Financials & Revenue

15.2.3. Key Contact Person

15.2.4. Headquarters Address

15.2.5. Key Product/Service Offered

15.3. Broadcom, Inc.

15.3.1. Business Overview

15.3.2. Key Financials & Revenue

15.3.3. Key Contact Person

15.3.4. Headquarters Address

15.3.5. Key Product/Service Offered

15.4. VMware, Inc.

15.4.1. Business Overview

15.4.2. Key Financials & Revenue

15.4.3. Key Contact Person

- 15.4.4. Headquarters Address
- 15.4.5. Key Product/Service Offered
- 15.5. Kaspersky Labs
  - 15.5.1. Business Overview
  - 15.5.2. Key Financials & Revenue
  - 15.5.3. Key Contact Person
  - 15.5.4. Headquarters Address
  - 15.5.5. Key Product/Service Offered
- 15.6. F-Secure Corporation
  - 15.6.1. Business Overview
  - 15.6.2. Key Financials & Revenue
  - 15.6.3. Key Contact Person
  - 15.6.4. Headquarters Address
  - 15.6.5. Key Product/Service Offered
- 15.7. Forcepoint Cyber Holdings, Inc.
  - 15.7.1. Business Overview
  - 15.7.2. Key Financials & Revenue
  - 15.7.3. Key Contact Person
  - 15.7.4. Headquarters Address
  - 15.7.5. Key Product/Service Offered
- 15.8. CyberArk Software Ltd.
  - 15.8.1. Business Overview
  - 15.8.2. Key Financials & Revenue
  - 15.8.3. Key Contact Person
  - 15.8.4. Headquarters Address
  - 15.8.5. Key Product/Service Offered
- 15.9. Red Sift Limited
  - 15.9.1. Business Overview
  - 15.9.2. Key Financials & Revenue
  - 15.9.3. Key Contact Person
  - 15.9.4. Headquarters Address
  - 15.9.5. Key Product/Service Offered
- 15.10. International Business Machines Corporation
  - 15.10.1. Business Overview
  - 15.10.2. Key Financials & Revenue
  - 15.10.3. Key Contact Person
  - 15.10.4. Headquarters Address
  - 15.10.5. Key Product/Service Offered

## **16. STRATEGIC RECOMMENDATIONS**

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