

Middle East & Africa Endpoint Detection and Response (EDR) Market Size and Forecast (2021 - 2031)

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Abstracts

The Endpoint Detection and Response (EDR) market in the Middle East and Africa is poised for significant growth, with projections indicating that it will reach approximately US\$ 952.7 million by 2031, up from US\$ 364.1 million in 2024. This growth trajectory reflects a robust compound annual growth rate (CAGR) of 15.2% anticipated between 2025 and 2031.

Executive Summary and Market Analysis

As the region undergoes rapid digital transformation, particularly in Gulf Cooperation Council (GCC) nations like Saudi Arabia, the UAE, and Qatar, cybersecurity has emerged as a critical national priority. The increasing incidence of cyber theft, fraud, and data breaches across various sectors is a primary driver of market growth. According to IBM's 2024 Cost of a Data Breach Report, organizations in the Middle East face an average cyberattack cost of US\$ 8.75 million, nearly double the global average.

The 2024 Cyber Security Report from Check Point Software Technologies reveals that Nigerian organizations are subjected to around 3,759 cyberattacks weekly, with ransomware being the most significant threat. In this challenging landscape, EDR solutions are essential for protecting digital assets. These systems are designed to collect and analyze data to detect suspicious activities, providing real-time insights and automated responses to mitigate potential breaches. Given the sophisticated nature of cyber threats in the region, which range from hacktivism to state-sponsored attacks, both government and private sector entities are increasingly deploying EDR technologies to enhance cyber resilience and protect critical infrastructure.

Strategic Insights

Market Segmentation Analysis

The Middle East and Africa EDR market can be segmented based on various criteria:

By Component: The market is divided into Solutions and Services, with Solutions commanding the largest market share in 2024.

By Deployment Mode: The market is categorized into Cloud and On-Premises, where Cloud solutions held the largest share in 2024.

By Enterprise Size: The segmentation includes SMEs and Large Enterprises, with Large Enterprises dominating the market in 2024.

By Industry Vertical: The market is further segmented into BFSI (Banking, Financial Services, and Insurance), IT and Telecom, Healthcare, Retail, Government, Manufacturing, and Others, with BFSI holding the largest share in 2024.

Market Outlook

The integration of AI-powered detection with automated response capabilities is revolutionizing EDR from being merely reactive tools to proactive, autonomous defense platforms. Traditionally, endpoint security relied on signature-based antivirus solutions and manual incident response. However, advancements in AI, particularly agentic AI, are enabling systems to autonomously detect threats, analyze root causes, and initiate containment with minimal human intervention. For instance, CrowdStrike's Charlotte AI, introduced at RSA 2025, exemplifies this shift by automating triage, investigation, and response workflows to identify and neutralize threats in near real-time. Similarly, SentinelOne's Athena release, featuring Purple AI, orchestrates detection and remediation tasks across complex environments.

Autonomous AI agents are increasingly taking over routine Security Operations Center (SOC) tasks, such as triage, alert enrichment, and automated response. At Infosec Europe 2025, vendors like Okta, Rubrik, and Abnormal AI showcased AI-driven identity threat protection and Extended Detection and Response (XDR) tools that leverage real-time correlation across various attack surfaces, even addressing potential quantum-era

threats. This convergence allows SOC teams to move from fragmented investigation workflows to a cohesive, proactive threat mitigation pipeline, resulting in faster Mean Time to Recovery (MTTR) and reduced alert fatigue.

Country Insights

The EDR market in the Middle East and Africa is further segmented by country, including the United Arab Emirates, Saudi Arabia, South Africa, and the Rest of the Middle East and Africa. The UAE held the largest market share in 2024, driven by its status as a regional hub for finance, trade, and innovation, making it a prime target for cyber threats. Consequently, both government and private sectors are heavily investing in advanced cybersecurity technologies, including EDR systems. These systems are increasingly adopted across various sectors such as banking, energy, healthcare, and government, motivated by the need for real-time threat detection, rapid response, and enhanced visibility across endpoints.

The UAE's National Cybersecurity Strategy, led by the Telecommunications and Digital Government Regulatory Authority (TDRA) and the UAE Cybersecurity Council, emphasizes the integration of advanced threat intelligence tools like EDR into national defense frameworks. The strategy is bolstered by international collaborations, partnerships with leading cybersecurity vendors, and stringent regulatory requirements, such as compliance with the UAE Information Assurance Standards, which have accelerated the deployment of EDR platforms.

Company Profiles

Key players in the Middle East and Africa EDR market include Microsoft Corp, Broadcom Inc, Cisco Systems Inc, Palo Alto Networks Inc, Fortinet Inc, Trend Micro Inc, CrowdStrike Holdings Inc, Zoho Corp Pvt Ltd, SentinelOne Inc, and Sophos Ltd. These companies are pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to deliver cutting-edge products to their customers and enhance their market presence.

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