

# **South & Central America Digital Forensics Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Software, Hardware, and Services), Type (Mobile Forensics, Computer Forensics, Network Forensics, and Others), and Industry Vertical (Government and Defense, Law Enforcement, BFSI, IT and Telecom, Healthcare, Retail, and Others)**

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## **Abstracts**

The South and Central America Digital Forensics Market is projected to grow significantly, reaching an estimated US\$ 308.5 million by 2031, up from US\$ 187.4 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 7.7% from 2025 to 2031, driven by increasing cyber threats and the need for enhanced cybersecurity measures in the region.

Recent research from Positive Technologies highlights a concerning trend: Latin America has the highest global prevalence of ransomware attacks, with 79% of cyberattacks involving ransomware, far exceeding the global average of 53% as of December 2023. This alarming statistic indicates that cybercriminals view organizations in South and Central America as particularly vulnerable, likely due to inadequate cybersecurity infrastructure, limited preparedness, and insufficient investment in advanced threat detection and response capabilities. Supporting this, Verizon's 2023 Data Breach Investigations Report found that 94% of breaches in Latin America were due to system intrusions, social engineering, and basic web application attacks, which are common tactics used in ransomware operations. These findings underscore the persistent exploitation of the region's cyber weaknesses, particularly in sectors such as finance, healthcare, education, and government, which often handle sensitive data but

lack robust cyber defenses.

In response to this escalating threat landscape, organizations across South and Central America are increasingly recognizing the critical role of digital forensics in enhancing their cyber resilience. Digital forensics capabilities are essential for effectively responding to ransomware incidents, as they allow organizations to trace the origins of intrusions, understand the methods used by attackers, recover encrypted data when feasible, and support legal or regulatory investigations. According to the LATAM CISO 2023 Cybersecurity Report, 71% of cybersecurity leaders in the region reported an increase in cyberattacks on their organizations over the past year, further emphasizing the urgent need for improved forensic readiness.

The South and Central America Digital Forensics Market is segmented by various components, including Software, Hardware, and Services, with Software holding the largest market share in 2024. Additionally, the market is categorized by type into Mobile Forensics, Computer Forensics, Network Forensics, and Others, with Mobile Forensics also leading the market share in 2024. By industry vertical, the market is divided into Government and Defense, Law Enforcement, Banking, Financial Services, and Insurance (BFSI), IT and Telecom, Healthcare, Retail, and others, with Government and Defense sectors holding the largest share.

The rapid proliferation of Internet of Things (IoT) devices has introduced new conveniences but also significant cybersecurity challenges. As smart devices become commonplace in both homes and workplaces, ensuring their security has become a top priority for manufacturers, regulators, and consumers. In response to these challenges, the US has launched initiatives aimed at enhancing consumer confidence and promoting secure design practices in the IoT sector. High-profile incidents, such as unauthorized access to home security systems and compromised surveillance cameras, have highlighted the vulnerabilities in IoT products, underscoring the need for improved security measures across the IoT ecosystem.

The introduction of the Cyber Trust Mark is expected to significantly impact the digital forensics market by increasing demand for specialized mobile and IoT forensics capabilities. As manufacturers focus on enhancing security standards and consumers adopt more IoT devices with certified protections, the complexity and volume of forensic investigations into these technologies are anticipated to rise. Digital forensics professionals will need to adapt to this evolving landscape by developing advanced tools and expertise to analyze data from increasingly secure and interconnected devices. This shift towards mobile and IoT forensics presents a pivotal market opportunity, as organizations and law enforcement agencies seek to address emerging threats and vulnerabilities in this expanding digital frontier.

Country-wise, the South and Central America Digital Forensics Market is segmented into Brazil, Argentina, and the Rest of South and Central America, with Brazil holding

the largest market share in 2024. A notable incident in September 2023 involved a significant cybersecurity breach in Brazil's federal financial management system, Siafi, where cybercriminals attempted to divert approximately R\$9 million (~US\$1.7 million) from the Ministry of Management and Innovation. This incident illustrates the increasing sophistication of cybercriminals targeting critical government infrastructure in Brazil, particularly systems managing sensitive financial data. As Brazil continues its digital transformation across public administration and economic sectors, such attacks highlight the urgent need for advanced cybersecurity measures, including digital forensics. The role of digital forensics is crucial in investigating breaches of this magnitude, enabling authorities to trace the attack's origin, analyze the methods used, recover compromised data, and gather evidence for prosecution. This incident reflects broader vulnerabilities in Brazil, where cyber threats are becoming more frequent and complex, prompting both government institutions and private organizations to invest in digital forensics tools and capabilities to enhance incident response and strengthen national cyber resilience.

Key players in the South and Central America Digital Forensics Market include International Business Machines Corp, Microsoft Corp, Cisco Systems Inc, Open Text Corp, Cellebrite DI Ltd., Nuix Limited, Magnet Forensics, Paraben Corporation, Exterro, and Oxygen Forensics. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to deliver innovative solutions and increase their market share.

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