strategicdefence INTELLIGENCE

The Global Cybersecurity Market 2014–2024

Report Price: US$4,800 (Single User)

Summary

"The Global Cybersecurity Market 2014–2024" offers the reader detailed analysis of the global Cybersecurity market over the next ten years, and provides market size forecasts. It covers the key technological and market trends in the Cybersecurity market.

The global Cybersecurity market is estimated to value US$XX billion in 2014 and increase at a CAGR of XX% during the forecast period, to reach its peak of US$XX billion by 2024. The market consists of four categories: network security, data security, identity and access security and cloud security. The network security segment is expected to account for XX% of the global cybersecurity market, followed by data security with XX%, identity and access security with XX%, and cloud security with XX% of share. During the forecast period, the cumulative global expenditure on cybersecurity is expected to reach US$XX billion.

"The Global Cybersecurity Market 2014–2024" provides detailed analysis of the current industry size and growth expectations from 2014 to 2024, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

Key Findings

Over the last 10 years, the Internet, has been transformed into a battleground for many modern conflicts, with groups of hackers trying to publicize their cause, and several of these groups acting on behalf of their respective governments in order to disrupt critical processes or steal valuable data. Wars include a mix of physical, mental, and tactical elements, with information and communication technologies (ICT) playing a major role in the capabilities of mobile forces armed with real-time information devices. These ICTs can also be used to attack battlefield systems directly, to capture sensitive data from defense contractors and governments, or disrupt national infrastructure. As such, defense systems must be built to detect and counter these attacks, making cyber warfare systems essential tools for maintaining an advantage in modern conflicts. The need to protect such vital networks, coupled with the increased importance of such systems in modern warfare, means global spending on cyber security is expected to remain robust over the forecast period

Key Features and Benefits

The report provides detailed analysis of the market for Cybersecurity during 2014–2024, including the factors that influence why countries are investing or cutting expenditure on these segments. It provides detailed expectations of growth rates and projected total expenditure.

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1 Global Cybersecurity Market Size and Drivers

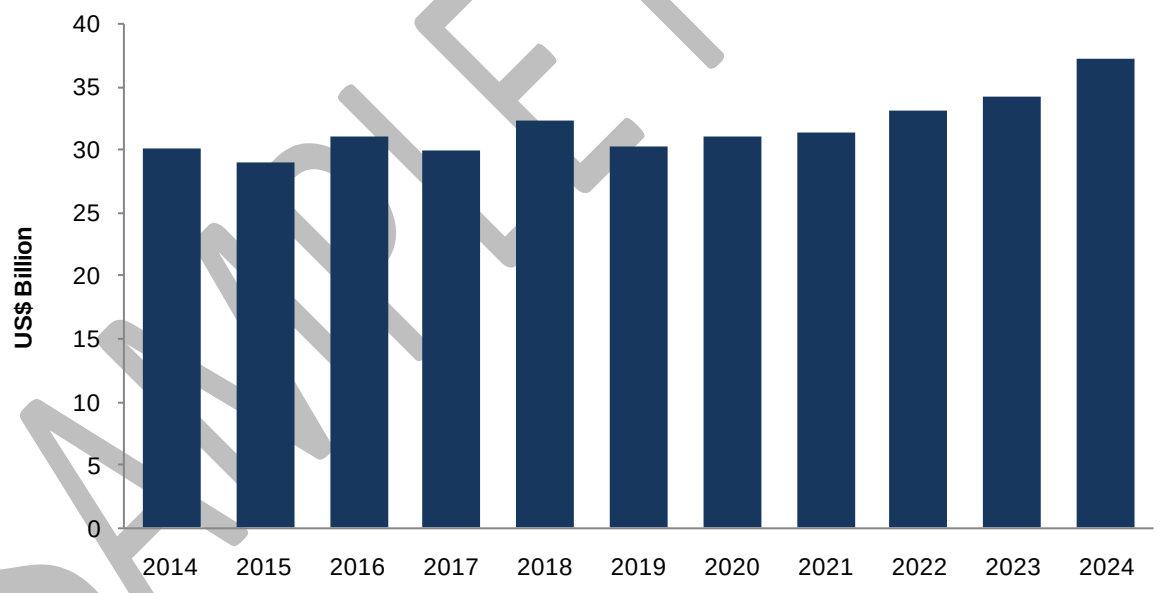
1.1 Cybersecurity Market Size and Forecast 2014–2024

1.1.1 Global cybersecurity market expected to witness a robust growth over the forecast period

The global cyber security market is projected to record robust growth in spending over the forecast period, due to the rise in cyber-attacks on the military and other critical IT infrastructure. Countries across regions are now focusing on establishing and developing their cyber security infrastructure, an area of defense spending that was neglected until recently. The cyber security market is increasing at a CAGR of XX%, from US$XX billion in 2014, to value US$XX billion in 2024. The market consists of four categories of cybersecurity: network security, data security, identity and access, and cloud security. The network security segment is expected to account for XX% of the global cybersecurity market, followed by data security, identity and access, and cloud security, with shares of XX%, XX%, and XX% respectively. During the forecast period, cumulative global expenditure on cybersecurity is expected to reach US$XX billion.

The chart below shows the expected cybersecurity market value during 2014–2024:

Figure 1: Global Cybersecurity Market (US$ Billion), 2014–2024



Source: SDI analysis

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1.2 Global Cybersecurity Market – Regional Analysis

1.2.1 North America is expected to lead the global cybersecurity market

The global cybersecurity market is dominated by North America, with the US being the largest defense spender in the world; overall, North America is set to spend US$XX billion on cybersecurity during the forecast period. Despite the scheduled budget cuts in the US and Western Europe, authorities in these countries have protected and prioritized investments in areas such as cybersecurity, special operations, and intelligence, surveillance, and reconnaissance assets.

Asia Pacific represents the second-largest market, with the total cybersecurity market valued at around US$XX billion, offering a potentially attractive investment opportunity for suppliers. Europe is projected to spend an estimated US$XX billion on cybersecurity during the forecast period, followed by the Middle East and Latin America, with US$XX billion and US$XX billion respectively.

The table below gives a brief overview of the cybersecurity market:

Table 1: Global Cybersecurity Market Overview

Region	Market in 2014	Market in 2024	Total Market (2014–2024)	Annualized growth/decline (2014–2024)
North America	US$XX billion	US$XX billion	US$XX billion	XX%
Asia-Pacific	US$XX billion	US$XX billion	US$XX billion	XX%
Europe	US$XX billion	US$XX billion	US$XX billion	XX%
Middle East	US$XX billion	US$XX billion	US$XX billion	XX%
Latin America	US$XX billion	US$XX billion	US$XX billion	XX%
Africa	US$XX million	US$XX billion	US$XX billion	XX%
Total Cybersecurity Market	**US$XX billion**	**US$XX billion**	**US$XX billion**	**XX%**

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2 SWOT Analysis of the Cybersecurity Market

Table 2: SWOT Analysis of the Cybersecurity Market

Strengths	Weaknesses
Opportunities	**Threats**

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3 Country Analysis – Cybersecurity

3.1 United States Market Size and Forecast 2014–2024

The US has the world's largest defense budget and the largest share of expenditure on cybersecurity in the world. Recent years have witnessed increasing instances of cyber-intrusion, some of which appear to be tied to US major rivals such as Russia and China. The threat posed by China is not new, but the frequency of attacks originating from the country is a matter of prime concern. The recent intrusions at some of the important US establishments including International Monetary Fund, Lockheed Martin, Citibank, NASDAQ, and Google, and the digital infiltration of the RQ170 Sentinel drone by Iran, point towards a need for the urgent strengthening of the existing cyber security infrastructure.

The growing importance being placed on cyber security can be gauged by the proposed increase of 21% in the Presidential budget for 2014 for various cyber defense initiatives, at a time of overall defense budget cuts. The additional expenditure would sponsor projects such as NETCENTS-2, National Cyber Range (NCR) - Phase –II, Cyber Crime Center (DC3), Agile Cyber Technology (ACT) program, DARPA - Active Authentication Program, and DHS - EINSTEIN / National Cybersecurity Protection System (NCPS).

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The table below gives a brief overview of the US Cybersecurity market:

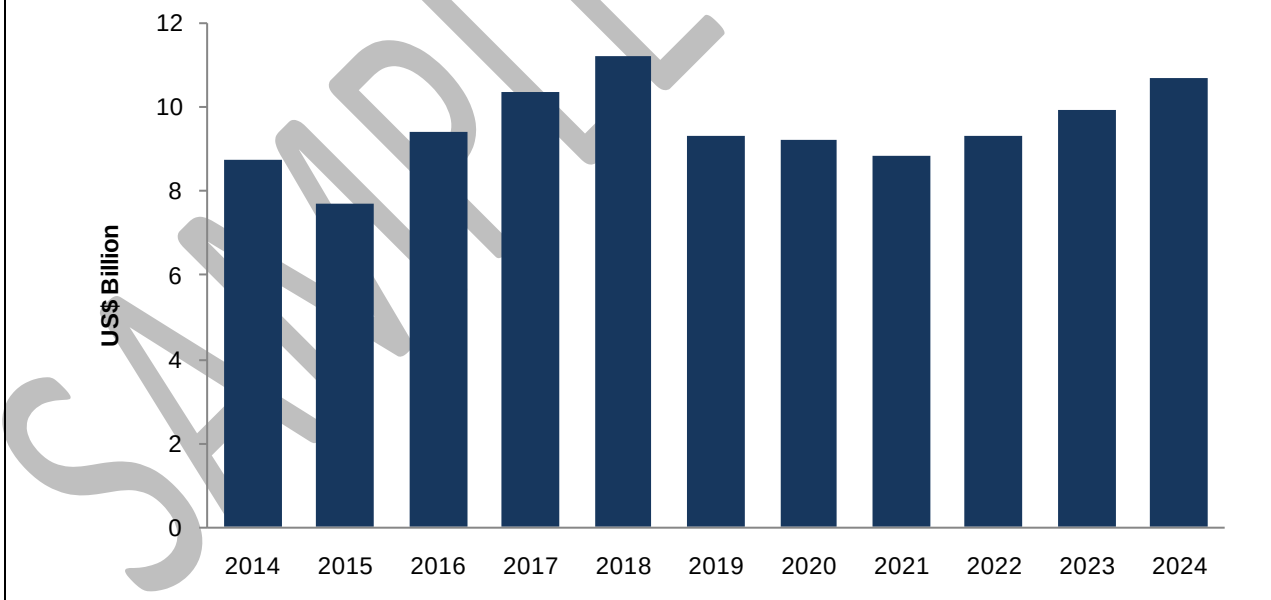
Table 3: US Cybersecurity Market Overview

Particulars	Market in 2014	Market in 2024	Total Market (2014–2024)	Annualized growth/decline (2014–2024)
Network security	US$XX billion	US$XX billion	US$XX billion	XX%
Data security	US$XX billion	US$XX billion	US$XX billion	XX%
Identity & Access	US$XX billion	US$XX billion	US$XX billion	XX%
Cloud security	US$XX billion	US$XX billion	US$XX billion	XX%
Total Cybersecurity Market	**US$XX billion**	**US$XX billion**	**US$XX billion**	**XX%**

Source: SDI analysis © SDI

The chart below shows the Cybersecurity market size in the US between 2014 and 2024:

Figure 2: Cybersecurity Market in the US (US$ Billion), 2014–2024



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The table below shows the key US Cybersecurity programs:

Table 4: Key US Cybersecurity Programs

Program/Equipment Name	Type	Quantity Procured	Supplier/Country	Delivery Period	Total Contract Value
Einstein intrusion detection system	Network security	NA	US	2010–2024	US$XX million
Cyber Genome project	Network security	NA	US	2010–2013	US$XX million

Source: SDI analysis

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Report Methodology

Strategic Defense Intelligence (SDI) dedicated research and analysis teams consist of experienced professionals with a background in industry research and consulting in the defense sector. The market size is derived by consolidating ongoing procurement programs, modernization initiatives, and future procurement plans, utilizing information gathered through primary and secondary sources. Forecasting is conducted based on the lifetime of current inventory levels, suitability/need of the weapon category for a specific country, budget availability, and opinion of leading industry experts. The following research methodology is followed for all databases and reports.

Secondary Research

The research process begins with exhaustive secondary research to source reliable qualitative and quantitative information related to the global cybersecurity market. The secondary research sources that are typically referred to include, but are not limited to:

- Globally renowned think tanks
- Industry associations
- National government documents and statistical databases
- Company websites, annual reports, financial reports, broker reports, and investor presentations
- Industry trade journals and other literature
- Internal and external proprietary databases
- News articles, press releases, and webcasts specific to the companies operating in the market

Primary Research

SDI conducts hundreds of primary interviews a year with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfills the following functions:

- Provides first-hand information on market size, market trends, growth trends, competitive landscape, and future outlook.
- Helps to validate and strengthen secondary research findings.
- Further develops the analyses team's expertise and market understanding.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, business development managers, market intelligence managers, and national sales managers.
- External experts: investment bankers, valuation experts, research analysts, and key opinion leaders specializing in defense markets.

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Conventions

- Currency conversions are performed on the basis of average annual conversion rate format calculations.
- All the values in tables, with the exception of compounded annual growth rate (CAGR) and compounded annual rate of change (CARC) are displayed to one decimal place. Growth rates may, therefore, appear inconsistent with absolute values due to this rounding method.

Related Reports

The Global Military Simulation and Virtual Training Market 2014–2024

The Global Military IT, Data and Computing Market 2014–2024

The Global Government Biometric Systems Market 2014–2024

The Global Military GPS/GNSS Market 2013–2023

The Global Military Ammunition Market 2013–2023

The Global Man-Portable Military Electronics Market 2013–2023

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