

## **Zero Trust Security Market by Offering (Solution and Services), Security Type (Network Security, Application Security, Cloud Security, and Endpoint Security and IoT Security), Authentication Type, Vertical and Region - Global Forecast to 2028**

Market Report | 2023-09-27 | 308 pages | MarketsandMarkets

### **AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

### **Report description:**

The global zero trust security market size is projected to grow from USD 31.1 billion in 2023 to USD 67.9 billion by 2028 at a Compound Annual Growth Rate (CAGR) of 16.9% during the forecast period. The increasing sophistication of cyber threats, rapid digital transformation, and stringent regulatory demands collectively fuel the adoption of zero-trust security. Based on continuous authentication and access verification, this approach mitigates risks in an interconnected IT landscape. Traditional perimeter-based security is proving inadequate in the face of evolving threats, making Zero Trust a vital safeguard for organizations in the modern era.

"By vertical, the IT & ITeS segment accounts for a larger market share."

The IT & ITeS vertical holds the largest market share in the zero trust security market due to its unique combination of factors, as the vertical deals extensively with sensitive data, including customer financial information and intellectual property, making robust security measures imperative. Its intricate IT infrastructure, encompassing diverse devices and networks, demands a modern approach like zero trust security for adequate protection. Moreover, compliance requirements like GDPR and PCI DSS are stringent, and zero trust security offers a comprehensive framework for adherence. With a remote workforce becoming commonplace, zero trust's capability to verify user identity and authorization, irrespective of location, further solidifies its dominance in this market.

?

"By Authentication Type, the Multi-Factor Authentication segment accounts for a larger market share."

Multi-factor authentication holds the largest market share in the zero-trust security market due to its pivotal role in fortifying identity verification. It addresses critical security concerns by necessitating multiple forms of identity validation, enhancing user trustworthiness. This is especially crucial in the IT and ITeS sectors, where vast volumes of sensitive data are handled daily. MFA

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

effectively curbs unauthorized access, thwarting potential breaches. Furthermore, its adaptability to various devices and environments makes it indispensable for safeguarding IT and ITeS infrastructures, driving its dominance in the zero-trust security landscape.

#### Breakdown of primaries

The study contains various industry experts' insights, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

- By Company Type: Tier 1 - 40%, Tier 2 - 35%, and Tier 3 - 20%
- By Designation: C-level - 45%, Directors - 35%, and Managers - 20%
- By Region: North America - 35%, Asia Pacific - 30%, Europe - 25%, Middle East & Africa - 5%, Latin America - 5%

Major vendors in the global zero trust security market include Palo Alto Networks (US), VMware (US), Zscaler (US), Akamai (US), Microsoft (US), Cisco (US), IBM (US), Citrix (US), Check Point (US), Trellix (US), Forcepoint (US), CrowdStrike (US), Cloudflare (US), Fortinet (US), Google (US), Qnext (Canada), Illumio (US), ON2IT (Netherlands), Perimeter 81 (US), ThreatLocker (US), Twingate (US), Appgate (US), Zero Networks (Israel), Zentara (US), Xage (US), and Skyhigh Security (US).

The study includes an in-depth competitive analysis of the key players in the zero trust security market, their company profiles, recent developments, and key market strategies.

#### Research Coverage

The report segments the zero trust security market and forecasts its size by Offering (Solution and Services), Security Type (Network Security, Application Security, Cloud Security, Endpoint Security, and IoT Security), Authentication Type (Single-Factor Authentication and Multi-Factor Authentication), Vertical (Banking, Financial Services and Insurance (BFSI), Government and Defense, IT & ITeS, Healthcare, Retail and eCommerce, Energy and Utilities, other Verticals), and Region (North America, Europe, Asia Pacific, Middle East and Africa, and Latin America).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

#### Key Benefits of Buying the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall zero trust security market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (rapid adoption of cloud and surge in digital transformation, rising regulatory compliance demands to propel the adoption of zero-trust security, diminishing perimeter security paving the way for zero trust security, and rising threat of sophisticated cyber attacks), restraints (complexity and cost of implementation, legacy systems and compatibility, and organizational resistance to change), opportunities (securing IoT with zero trust solutions: a growing opportunity, leveraging innovation: new zero trust security products and services as an opportunity, and leveraging the surge in zero trust security awareness for market growth), and challenges (weakening of established security perimeters, the growth of business-led IT, a.k.a shadow SaaS, digital supply chain vulnerability, and fragmented security operations and siloed teams)

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the zero trust security market.

- Market Development: Comprehensive information about lucrative markets - the report analyses the zero trust security market across varied regions.

- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the zero trust security market.

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players Palo Alto Networks (US), VMware (US), Zscaler (US), Akamai (US), and Microsoft (US), among others, in the zero trust security market

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

strategies.

**Table of Contents:**

1 INTRODUCTION 43

1.1 STUDY OBJECTIVES 43

1.2 MARKET DEFINITION 43

1.3 STUDY SCOPE 44

1.3.1 MARKET SEGMENTATION 44

1.3.2 INCLUSIONS & EXCLUSIONS 44

1.3.3 REGIONS COVERED 45

1.4 YEARS CONSIDERED 46

1.5 CURRENCY CONSIDERED 46

TABLE 1 USD EXCHANGE RATES, 2018-2022 46

1.6 STAKEHOLDERS 47

1.7 RECESSION IMPACT 47

1.8 SUMMARY OF CHANGES 47

2 RESEARCH METHODOLOGY 48

2.1 RESEARCH DATA 48

FIGURE 1 ZERO TRUST SECURITY MARKET: RESEARCH DESIGN 49

2.1.1 SECONDARY DATA 49

2.1.2 PRIMARY DATA 50

2.1.2.1 Breakup of primaries 50

FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION 50

2.1.2.2 Key industry insights 51

2.2 DATA TRIANGULATION 51

2.3 MARKET SIZE ESTIMATION 52

FIGURE 3 ZERO TRUST SECURITY MARKET ESTIMATION: RESEARCH FLOW 52

2.3.1 TOP-DOWN APPROACH 53

FIGURE 4 APPROACH 1 (SUPPLY SIDE): REVENUE FROM SOFTWARE/SERVICES OF ZERO TRUST SECURITY VENDORS 53

FIGURE 5 APPROACH 1 (SUPPLY-SIDE ANALYSIS) 53

2.3.2 BOTTOM-UP APPROACH 54

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY (APPROACH 2): BOTTOM-UP (DEMAND SIDE) - PRODUCTS/SOLUTIONS/SERVICES 54

2.4 MARKET FORECAST 55

TABLE 2 FACTOR ANALYSIS 55

2.5 RESEARCH ASSUMPTIONS 55

2.6 LIMITATIONS AND RISK ASSESSMENT 56

2.7 RECESSION IMPACT ANALYSIS 56

3 EXECUTIVE SUMMARY 57

TABLE 1 ZERO TRUST SECURITY MARKET AND GROWTH, 2017-2022 (USD MILLION) 58

TABLE 2 ZERO TRUST SECURITY MARKET AND GROWTH, 2023-2028 (USD MILLION) 58

FIGURE 7 NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET IN 2023 59

4 PREMIUM INSIGHTS 60

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN ZERO TRUST SECURITY MARKET 60

FIGURE 8 INCREASING INSTANCES OF SOPHISTICATED CYBERATTACKS AND NEED FOR ADHERENCE TO REGULATORY COMPLIANCE TO DRIVE MARKET GROWTH 60

4.2 ZERO TRUST SECURITY MARKET, BY OFFERING 60

FIGURE 9	SERVICES SEGMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD	60
4.3	ZERO TRUST SECURITY MARKET, BY SECURITY TYPE	61
FIGURE 10	APPLICATION SECURITY SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	61
4.4	ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE	61
FIGURE 11	MULTI-FACTOR AUTHENTICATION SEGMENT TO GROW AT HIGHER CAGR BY 2028	61
4.5	ZERO TRUST SECURITY MARKET, BY VERTICAL	62
FIGURE 12	IT & ITES SEGMENT TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD	62
4.6	MARKET INVESTMENT SCENARIO	62
FIGURE 13	ASIA PACIFIC TO EMERGE AS LUCRATIVE MARKET FOR INVESTMENTS IN NEXT FIVE YEARS	62
5	MARKET OVERVIEW AND INDUSTRY TRENDS	63
5.1	INTRODUCTION	63
FIGURE 14	ZERO TRUST SECURITY MODERN ARCHITECTURE	64
5.2	EVOLUTION OF ZERO TRUST SECURITY MARKET: COMPREHENSIVE HISTORY AND OUTLOOK	64
FIGURE 15	SEVEN PILLARS OF ZERO TRUST SECURITY MODEL	65
5.3	MARKET DYNAMICS	66
FIGURE 16	ZERO TRUST SECURITY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	66
5.3.1	DRIVERS	66
5.3.1.1	Rapid adoption of cloud and surge in digital transformation	66
5.3.1.2	Rising regulatory compliance demands	67
5.3.1.3	Diminishing popularity of perimeter-based security	67
5.3.1.4	Rising threat of sophisticated cyberattacks	68
5.3.2	RESTRAINTS	68
5.3.2.1	Complexity and costly implementation	68
5.3.2.2	Presence of legacy systems and compatibility issues	68
5.3.2.3	Organizational resistance to change	69
5.3.3	OPPORTUNITIES	69
5.3.3.1	Improved visibility into networks and robust security	69
5.3.3.2	Development of new zero trust security products and services	70
5.3.3.3	Surge in awareness regarding zero trust security	70
5.3.4	CHALLENGES	71
5.3.4.1	Weakening of established security perimeters	71
5.3.4.2	Growth of shadow SaaS applications	71
5.3.4.3	Digital supply chain vulnerability	71
5.3.4.4	Fragmented security operations and siloed teams	72
5.4	CASE STUDY ANALYSIS	72
5.4.1	DELOITTE'S CUSTOMIZED SOLUTION HELPED MAJOR CHEMICAL INDUSTRIAL ORGANIZATION ACHIEVE ZERO TRUST ARCHITECTURE	72
5.4.2	ARRIVAL ENHANCED ITS INTERNAL INFRASTRUCTURE SECURITY WITH CLOUDFLARE'S ZERO TRUST NETWORK ACCESS	73
5.4.3	CISCO HELPED VICTORIA UNIVERSITY ENHANCE CAMPUS SECURITY WITH ZERO TRUST SECURITY SOLUTIONS	74
5.5	VALUE CHAIN ANALYSIS	75
FIGURE 17	VALUE CHAIN ANALYSIS	76
5.5.1	RESEARCH & DEVELOPMENT	76
5.5.2	SOLUTION PROVIDERS	76
5.5.3	INTEGRATION & DEPLOYMENT	77
5.5.3.1	Managed security service providers	77
5.5.3.2	Training & education providers	77
5.5.4	COMPLIANCE & AUDITING	77

5.5.5	END USERS	77
5.6	ECOSYSTEM ANALYSIS	78
TABLE 3	ECOSYSTEM ANALYSIS	79
FIGURE 18	ECOSYSTEM MAP	80
5.7	PORTER'S FIVE FORCES ANALYSIS	80
FIGURE 19	PORTER'S FIVE FORCES ANALYSIS	81
TABLE 4	PORTER'S FIVE FORCES MODEL: IMPACT ANALYSIS	81
5.7.1	THREAT OF NEW ENTRANTS	81
5.7.2	BARGAINING POWER OF SUPPLIERS	82
5.7.3	BARGAINING POWER OF BUYERS	82
5.7.4	THREAT OF SUBSTITUTES	82
5.7.5	INTENSITY OF COMPETITIVE RIVALRY	82
5.8	INDICATIVE PRICING ANALYSIS	82
TABLE 5	CLOUDFLARE: PRICING ANALYSIS	83
TABLE 6	PERIMETER 81: PRICING ANALYSIS	84
TABLE 7	OKTA: PRICING ANALYSIS	85
TABLE 8	ILLUMIO: PRICING ANALYSIS	86
5.9	TECHNOLOGY ANALYSIS	87
5.9.1	ARTIFICIAL INTELLIGENCE	87
5.9.2	BLOCKCHAIN	88
5.9.3	INTERNET OF THINGS	89
5.10	PATENT ANALYSIS	89
FIGURE 20	PATENTS PUBLISHED, 2012-2023	90
TABLE 9	LIST OF PATENTS IN ZERO TRUST SECURITY MARKET, 2022-2023	91
5.11	TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	93
FIGURE 21	TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	93
5.12	TECHNOLOGY ROADMAP	94
TABLE 10	TECHNOLOGY ROADMAP	94
5.13	ZERO TRUST SECURITY MARKET: BUSINESS MODELS	95
TABLE 11	ZERO TRUST SECURITY MARKET: BUSINESS MODELS	95
5.14	TARIFF AND REGULATORY LANDSCAPE	96
5.14.1	PAYMENT CARD INDUSTRY DATA SECURITY STANDARD (PCI-DSS)	96
5.14.2	GENERAL DATA PROTECTION REGULATION (GDPR)	96
5.14.3	CALIFORNIA CONSUMER PRIVACY ACT (CCPA)	96
5.14.4	GRAMM-LEACH-BLILEY ACT OF 1999 (GLBA)	97
5.14.5	PERSONAL INFORMATION PROTECTION AND ELECTRONIC DOCUMENTS ACT (PIPEDA)	97
5.14.6	HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT (HIPAA)	97
5.14.7	INTERNATIONAL ORGANIZATION FOR STANDARDIZATION (ISO) STANDARD 27001	97
5.14.8	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	98
TABLE 12	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	98
TABLE 13	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	99
TABLE 14	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	99
5.15	KEY STAKEHOLDERS AND BUYING CRITERIA	99
5.15.1	KEY STAKEHOLDERS IN BUYING PROCESS	99
FIGURE 22	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS	99
TABLE 15	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS	100
5.15.2	BUYING CRITERIA	100

FIGURE 23	KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS	100
TABLE 16	KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS	100
5.16	KEY CONFERENCES & EVENTS	101
TABLE 17	KEY CONFERENCES & EVENTS, 2023-2024	101
6	ZERO TRUST SECURITY MARKET, BY OFFERING	102
6.1	INTRODUCTION	103
6.1.1	OFFERINGS: ZERO TRUST SECURITY MARKET DRIVERS	103
FIGURE 24	SOLUTIONS SEGMENT TO ACCOUNT FOR LARGER MARKET DURING FORECAST PERIOD	103
TABLE 18	ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	104
TABLE 19	ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	104
6.2	SOLUTIONS	104
6.2.1	FOCUS ON OPTIMIZING OPERATIONAL EFFICIENCY WITH ZERO TRUST SECURITY SOLUTIONS	104
TABLE 20	SOLUTIONS: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	104
TABLE 21	SOLUTIONS: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	105
6.3	SERVICES	105
6.3.1	NEED FOR PROACTIVE EXPERTISE AND CONTINUOUS PROTECTION SERVICES TO DRIVE MARKET FOR ZERO TRUST SECURITY SOLUTIONS	105
TABLE 22	SERVICES: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	105
TABLE 23	SERVICES: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	106
6.3.2	PROFESSIONAL SERVICES	106
6.3.2.1	Design, deployment, integration, and consulting	106
6.3.2.2	Training & education	106
6.3.2.3	Support & maintenance	107
6.3.3	MANAGED SERVICES	107
7	ZERO TRUST SECURITY MARKET, BY SOLUTION	108
7.1	INTRODUCTION	108
7.1.1	SOLUTIONS: ZERO TRUST SECURITY MARKET DRIVERS	108
7.2	IDENTITY AND ACCESS MANAGEMENT (IAM)	108
7.3	MICRO-SEGMENTATION	109
7.4	ZERO TRUST NETWORK ACCESS (ZTNA)	109
7.5	SECURITY INFORMATION AND EVENT MANAGEMENT (SIEM)	110
7.6	USER AND ENTITY BEHAVIOR ANALYTICS (UEBA)	111
7.7	POLICY MANAGEMENT	111
7.8	OTHER SOLUTIONS	112
8	ZERO TRUST SECURITY MARKET, BY SECURITY TYPE	113
8.1	INTRODUCTION	114
8.1.1	SECURITY TYPES: ZERO TRUST SECURITY MARKET DRIVERS	114
FIGURE 25	CLOUD SECURITY SEGMENT TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD	115
TABLE 24	ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	115
TABLE 25	ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	115
8.2	NETWORK SECURITY	116
8.2.1	ZERO TRUST SECURITY SOLUTIONS TO BOLSTER NETWORK SECURITY AGAINST EVOLVING THREATS	116
TABLE 26	NETWORK SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	116
TABLE 27	NETWORK SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	117
8.3	APPLICATION SECURITY	117
8.3.1	NEED FOR CONTINUOUS MONITORING AND ACCESS CONTROL IN ZERO TRUST APPLICATION SECURITY TO BOOST GROWTH	117

TABLE 28	APPLICATION SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	117
TABLE 29	APPLICATION SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	118
8.4	CLOUD SECURITY	118
8.4.1	EMPHASIS ON STRENGTHENING CLOUD SECURITY WITH CASBS, CSPM, AND CWPPS IN ZERO TRUST SECURITY ENVIRONMENT TO DRIVE DEMAND	118
TABLE 30	CLOUD SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	118
TABLE 31	CLOUD SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	119
8.5	ENDPOINT SECURITY & IOT SECURITY	119
8.5.1	RIISING COMPLEXITIES IN ENDPOINT AND IOT SECURITY TO ENCOURAGE ADOPTION OF ZERO TRUST SECURITY SOLUTIONS	119
TABLE 32	ENDPOINT SECURITY & IOT SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	120
TABLE 33	ENDPOINT SECURITY & IOT SECURITY: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	120
9	ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE	121
9.1	INTRODUCTION	122
9.1.1	AUTHENTICATION TYPES: ZERO TRUST SECURITY MARKET DRIVERS	122
FIGURE 26	MULTI-FACTOR AUTHENTICATION SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	122
TABLE 34	ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	123
TABLE 35	ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	123
9.2	SINGLE-FACTOR AUTHENTICATION	123
9.2.1	GROWING DEMAND FOR ZERO TRUST PRINCIPLES AND SSO TO BOOST MARKET EXPANSION	123
TABLE 36	SINGLE-FACTOR AUTHENTICATION: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	124
TABLE 37	SINGLE-FACTOR AUTHENTICATION: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	124
9.3	MULTI-FACTOR AUTHENTICATION	124
9.3.1	DEMAND FOR ENHANCED AUTHENTICATION AND IDENTIFICATION ACROSS INDUSTRIES TO DRIVE MARKET	124
TABLE 38	MULTI-FACTOR AUTHENTICATION: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	125
TABLE 39	MULTI-FACTOR AUTHENTICATION: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	125
10	ZERO TRUST SECURITY MARKET, BY VERTICAL	126
10.1	INTRODUCTION	127
10.1.1	VERTICALS: ZERO TRUST SECURITY MARKET DRIVERS	127
FIGURE 27	IT & ITES SEGMENT TO ACHIEVE HIGHEST GROWTH DURING FORECAST PERIOD	129
TABLE 40	ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	129
TABLE 41	ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	129
10.2	BANKING, FINANCIAL SERVICES, AND INSURANCE (BFSI)	130
10.2.1	NEED FOR BFSI SECTOR TO ADOPT ADVANCED SECURITY SOLUTIONS AMID RISING CYBER THREATS TO DRIVE MARKET	130
TABLE 42	BFSI: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	130
TABLE 43	BFSI: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	130
10.3	GOVERNMENT & DEFENSE	131
10.3.1	ZERO TRUST SECURITY SOLUTIONS STRENGTHEN CYBERSECURITY RESILIENCE IN GOVERNMENT AND DEFENSE SECTORS	131
TABLE 44	GOVERNMENT & DEFENSE: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	131
TABLE 45	GOVERNMENT & DEFENSE: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	132
10.4	IT & ITES	132
10.4.1	GROWING COMPLEXITIES IN CYBERSECURITY AND STRINGENT REGULATORY REQUIREMENTS TO PROPEL MARKET	132
TABLE 46	IT & ITES: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	132
TABLE 47	IT & ITES: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	133
10.5	HEALTHCARE	133
10.5.1	ESCALATING CYBER THREATS TO BOOST POPULARITY OF ZERO TRUST SECURITY SOLUTIONS	133

TABLE 48	HEALTHCARE: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	134
TABLE 49	HEALTHCARE: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	134
10.6	RETAIL & ECOMMERCE	134
10.6.1	ZERO TRUST SECURITY SOLUTIONS SAFEGUARD RETAIL & ECOMMERCE SECTOR AMID DIGITAL EVOLUTION	134
TABLE 50	RETAIL & ECOMMERCE: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	135
TABLE 51	RETAIL & ECOMMERCE: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	135
10.7	ENERGY & UTILITIES	136
10.7.1	NEED FOR ENHANCED CRITICAL INFRASTRUCTURE SECURITY TO DRIVE ADOPTION OF ZERO TRUST SECURITY SOLUTIONS	136
TABLE 52	ENERGY & UTILITIES: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	137
TABLE 53	ENERGY & UTILITIES: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	137
10.8	OTHER VERTICALS	137
TABLE 54	OTHER VERTICALS: ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	138
TABLE 55	OTHER VERTICALS: ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	138
11	ZERO TRUST SECURITY MARKET, BY REGION	139
11.1	INTRODUCTION	140
FIGURE 28	ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	140
TABLE 56	ZERO TRUST SECURITY MARKET, BY REGION, 2017-2022 (USD MILLION)	140
TABLE 57	ZERO TRUST SECURITY MARKET, BY REGION, 2023-2028 (USD MILLION)	140
11.2	NORTH AMERICA	141
11.2.1	NORTH AMERICA: ZERO TRUST SECURITY MARKET DRIVERS	141
11.2.2	NORTH AMERICA: RECESSION IMPACT	142
11.2.3	NORTH AMERICA: REGULATORY LANDSCAPE	142
FIGURE 29	NORTH AMERICA: MARKET SNAPSHOT	143
TABLE 58	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	143
TABLE 59	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	144
TABLE 60	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	144
TABLE 61	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	144
TABLE 62	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	144
TABLE 63	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	145
TABLE 64	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	145
TABLE 65	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	145
TABLE 66	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2017-2022 (USD MILLION)	146
TABLE 67	NORTH AMERICA: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	146
11.2.4	US	146
11.2.4.1	Weak password hygiene and increased concerns regarding cybersecurity to fuel demand for zero trust security solutions	146
TABLE 68	US: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	146
TABLE 69	US: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	147
TABLE 70	US: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	147
TABLE 71	US: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	147
TABLE 72	US: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	147
TABLE 73	US: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	148
TABLE 74	US: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	148
TABLE 75	US: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	148
11.2.5	CANADA	149
11.2.5.1	Rising bot attacks and ransomware and increasing government initiatives to bolster cybersecurity to drive market	149



TABLE 76	CANADA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	149
TABLE 77	CANADA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	149
TABLE 78	CANADA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	150
TABLE 79	CANADA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	150
TABLE 80	CANADA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	150
TABLE 81	CANADA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	150
TABLE 82	CANADA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	151
TABLE 83	CANADA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	151
11.3	EUROPE	151
11.3.1	EUROPE: ZERO TRUST SECURITY MARKET DRIVERS	152
11.3.2	EUROPE: RECESSION IMPACT	152
11.3.3	EUROPE: REGULATORY LANDSCAPE	153
TABLE 84	EUROPE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	153
TABLE 85	EUROPE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	153
TABLE 86	EUROPE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	154
TABLE 87	EUROPE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	154
TABLE 88	EUROPE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	154
TABLE 89	EUROPE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	154
TABLE 90	EUROPE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	155
TABLE 91	EUROPE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	155
TABLE 92	EUROPE: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2017-2022 (USD MILLION)	155
TABLE 93	EUROPE: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	156
11.3.4	UK	156
11.3.4.1	Increased collaboration with forces to develop robust security solutions to drive market	156
TABLE 94	UK: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	156
TABLE 95	UK: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	156
TABLE 96	UK: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	157
TABLE 97	UK: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	157
TABLE 98	UK: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	157
TABLE 99	UK: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	157
TABLE 100	UK: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	158
TABLE 101	UK: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	158
11.3.5	GERMANY	158
11.3.5.1	Rising cyberattacks on critical government websites and early adoption of cutting-edge technologies to drive market	158
TABLE 102	GERMANY: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	159
TABLE 103	GERMANY: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	159
TABLE 104	GERMANY: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	159
TABLE 105	GERMANY: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	160
TABLE 106	GERMANY: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	160
TABLE 107	GERMANY: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	160
TABLE 108	GERMANY: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	161
TABLE 109	GERMANY: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	161
11.3.6	FRANCE	161
11.3.6.1	Increased internet use and need to safeguard sensitive data to boost demand for zero trust security solutions	161
TABLE 110	FRANCE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	162
TABLE 111	FRANCE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	162
TABLE 112	FRANCE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	162

TABLE 113	FRANCE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	163
TABLE 114	FRANCE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	163
TABLE 115	FRANCE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	163
TABLE 116	FRANCE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	163
TABLE 117	FRANCE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	164
11.3.7	REST OF EUROPE	164
TABLE 118	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	164
TABLE 119	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	165
TABLE 120	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	165
TABLE 121	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	165
TABLE 122	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	165
TABLE 123	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	166
TABLE 124	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	166
TABLE 125	REST OF EUROPE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	166
11.4	ASIA PACIFIC	167
11.4.1	ASIA PACIFIC: ZERO TRUST SECURITY MARKET DRIVERS	167
11.4.2	ASIA PACIFIC: RECESSION IMPACT	168
11.4.3	ASIA PACIFIC: REGULATORY LANDSCAPE	168
FIGURE 30	ASIA PACIFIC: MARKET SNAPSHOT	169
TABLE 126	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	169
TABLE 127	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	170
TABLE 128	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	170
TABLE 129	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	170
TABLE 130	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	170
TABLE 131	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	171
TABLE 132	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	171
TABLE 133	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	171
TABLE 134	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2017-2022 (USD MILLION)	172
TABLE 135	ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	172
11.4.4	CHINA	172
11.4.4.1	Booming mobile internet services and increasing importance of online payment security to drive market	172
TABLE 136	CHINA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	173
TABLE 137	CHINA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	173
TABLE 138	CHINA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	173
TABLE 139	CHINA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	173
TABLE 140	CHINA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	174
TABLE 141	CHINA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	174
TABLE 142	CHINA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	174
TABLE 143	CHINA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	175
11.4.5	JAPAN	175
11.4.5.1	Rising instances of cyberattacks to fuel demand for zero trust security solutions	175
TABLE 144	JAPAN: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	176
TABLE 145	JAPAN: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	176
TABLE 146	JAPAN: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	176
TABLE 147	JAPAN: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	176
TABLE 148	JAPAN: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	177
TABLE 149	JAPAN: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	177

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

TABLE 150	JAPAN: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	177
TABLE 151	JAPAN: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	178
11.4.6	INDIA	178
11.4.6.1	Cultural shifts, budget constraints, and escalating threat of cyberattacks to drive market	178
TABLE 152	INDIA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	178
TABLE 153	INDIA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	179
TABLE 154	INDIA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	179
TABLE 155	INDIA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	179
TABLE 156	INDIA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	179
TABLE 157	INDIA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	180
TABLE 158	INDIA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	180
TABLE 159	INDIA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	180
11.4.7	SINGAPORE	181
11.4.7.1	Increasing government initiatives to combat cyber threats to drive demand for zero trust security solutions	181
TABLE 160	SINGAPORE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	181
TABLE 161	SINGAPORE: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	181
TABLE 162	SINGAPORE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	182
TABLE 163	SINGAPORE: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	182
TABLE 164	SINGAPORE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	182
TABLE 165	SINGAPORE: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	182
TABLE 166	SINGAPORE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	183
TABLE 167	SINGAPORE: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	183
11.4.8	AUSTRALIA	183
11.4.8.1	Focus of government on adopting robust cybersecurity strategies to drive market	183
TABLE 168	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	184
TABLE 169	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	184
TABLE 170	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	184
TABLE 171	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	185
TABLE 172	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	185
TABLE 173	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	185
TABLE 174	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	186
TABLE 175	AUSTRALIA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	186
11.4.9	REST OF ASIA PACIFIC	186
TABLE 176	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	187
TABLE 177	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	187
TABLE 178	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	187
TABLE 179	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	187
TABLE 180	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	188
TABLE 181	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	188
TABLE 182	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	188
TABLE 183	REST OF ASIA PACIFIC: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	189
11.5	MIDDLE EAST & AFRICA	189
11.5.1	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET DRIVERS	190
11.5.2	MIDDLE EAST & AFRICA: RECESSION IMPACT	190
11.5.3	MIDDLE EAST & AFRICA: REGULATORY LANDSCAPE	190
TABLE 184	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	190
TABLE 185	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	191

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 186	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	191
TABLE 187	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	191
TABLE 188	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	191
TABLE 189	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	192
TABLE 190	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	192
TABLE 191	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	192
TABLE 192	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2017-2022 (USD MILLION)	193
TABLE 193	MIDDLE EAST & AFRICA: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	193
11.5.4	MIDDLE EAST	193
11.5.4.1	Rapid digital transformation to encourage organizations prioritize implementing effective cybersecurity solutions	193
TABLE 194	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	194
TABLE 195	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	194
TABLE 196	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	194
TABLE 197	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	194
TABLE 198	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	195
TABLE 199	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	195
TABLE 200	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	195
TABLE 201	MIDDLE EAST: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	196
11.5.5	AFRICA	196
11.5.5.1	Increasing awareness of people regarding zero trust security campaigns to drive market	196
TABLE 202	AFRICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	196
TABLE 203	AFRICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	196
TABLE 204	AFRICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	197
TABLE 205	AFRICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	197
TABLE 206	AFRICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	197
TABLE 207	AFRICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	197
TABLE 208	AFRICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	198
TABLE 209	AFRICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	198
11.6	LATIN AMERICA	198
11.6.1	LATIN AMERICA: ZERO TRUST SECURITY MARKET DRIVERS	199
11.6.2	LATIN AMERICA: RECESSION IMPACT	199
11.6.3	LATIN AMERICA: REGULATORY LANDSCAPE	199
TABLE 210	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	200
TABLE 211	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	200
TABLE 212	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	200
TABLE 213	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)	200
TABLE 214	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)	201
TABLE 215	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)	201
TABLE 216	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	201
TABLE 217	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	202
TABLE 218	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2017-2022 (USD MILLION)	202
TABLE 219	LATIN AMERICA: ZERO TRUST SECURITY MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	202
11.6.4	BRAZIL	203
11.6.4.1	Evolving cybersecurity challenges due to rapid shift to remote work during pandemic to drive market	203
TABLE 220	BRAZIL: ZERO TRUST SECURITY MARKET, BY OFFERING, 2017-2022 (USD MILLION)	203
TABLE 221	BRAZIL: ZERO TRUST SECURITY MARKET, BY OFFERING, 2023-2028 (USD MILLION)	203
TABLE 222	BRAZIL: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2017-2022 (USD MILLION)	203

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

TABLE 223BRAZIL: ZERO TRUST SECURITY MARKET, BY SECURITY TYPE, 2023-2028 (USD MILLION)204

TABLE 224BRAZIL: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2017-2022 (USD MILLION)204

TABLE 225BRAZIL: ZERO TRUST SECURITY MARKET, BY AUTHENTICATION TYPE, 2023-2028 (USD MILLION)204

TABLE 226BRAZIL: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2017-2022 (USD MILLION)204

TABLE 227BRAZIL: ZERO TRUST SECURITY MARKET, BY VERTICAL, 2023-2028 (USD MILLION)205

## Zero Trust Security Market by Offering (Solution and Services), Security Type (Network Security, Application Security, Cloud Security, and Endpoint Security and IoT Security), Authentication Type, Vertical and Region - Global Forecast to 2028

Market Report | 2023-09-27 | 308 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-21

Signature

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)