

Mobile Application Security Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Solution (Software, Service), By Services (Professional Services, Managed Services), By Professional Services (Consulting, Integration, Support and Maintenance), By Deployment (Cloud, On-premise), By Enterprise Size (Small and medium-sized enterprises, Large enterprises), By Vertical (BFSI, IT and Telecom, Retail, Healthcare, Education, Transportation and Logistics, Manufacturing, Government, Others), By Region, By Competition , 2018-2028

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Report description:

Global Mobile Application Security Market has valued at USD 5.4 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 23.1% through 2028. The Global Mobile Application Security Market is experiencing significant growth as the usage of mobile applications continues to soar. In an era where mobile devices have become ubiquitous for both personal and professional use, the need for robust security solutions has never been more critical. Mobile application security encompasses a wide range of measures aimed at safeguarding mobile apps from vulnerabilities, data breaches, and cyberattacks. With mobile applications serving as gateways to a wealth of sensitive user data, including personal information and financial details, businesses and app developers are increasingly investing in comprehensive security solutions. The market is further driven by the growing complexity of mobile app ecosystems and the ever-evolving threat landscape. Organizations across industries are adopting mobile application security solutions to protect their reputation, customer trust, and intellectual property. Additionally, stringent regulatory requirements and compliance standards are compelling businesses to prioritize mobile app security. As the demand for secure mobile experiences continues to rise, the Global Mobile Application Security Market is poised

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for sustained growth, with technology innovations such as app shielding, code analysis, and threat detection playing pivotal roles in fortifying the security of mobile applications.

Key Market Drivers

Rapid Growth in Mobile Applications

The global mobile application market has experienced a remarkable surge in growth, primarily fueled by the widespread adoption of smartphones and the escalating demand for mobile services. This exponential rise in mobile applications has consequently created a pressing need for robust security measures to safeguard sensitive user data and uphold the integrity of these applications. As a result, there has been a substantial upswing in the demand for mobile application security solutions. The proliferation of smartphones has revolutionized the way people interact with technology, leading to an unprecedented surge in the usage of mobile applications. These applications have become an integral part of our daily lives, offering a wide range of services such as social networking, e-commerce, banking, entertainment, and productivity tools. With the increasing reliance on mobile applications, the need to protect user data from unauthorized access, data breaches, and cyber threats has become paramount. Mobile application security solutions play a crucial role in addressing these concerns by implementing robust security measures throughout the application development lifecycle. These solutions encompass a wide array of techniques and technologies aimed at fortifying the security posture of mobile applications. They include secure coding practices, encryption algorithms, authentication mechanisms, secure data storage, secure communication protocols, and vulnerability assessments, among others. One of the primary challenges in mobile application security is the protection of sensitive user data. Mobile applications often collect and store a vast amount of personal information, including names, addresses, contact details, financial data, and even biometric information. This data is highly valuable to cybercriminals, making mobile applications an attractive target for attacks. Mobile application security solutions employ various encryption techniques to ensure that user data remains confidential and inaccessible to unauthorized individuals.

Another critical aspect of mobile application security is the prevention of unauthorized access and tampering. Mobile applications are vulnerable to various attacks, such as reverse engineering, code injection, and tampering with application binaries. Mobile application security solutions employ techniques like code obfuscation, anti-tampering mechanisms, and runtime application self-protection (RASP) to deter such attacks and ensure the integrity of the application. Furthermore, mobile application security solutions also address the growing concern of mobile malware. Malicious applications pose a significant threat to user privacy and can compromise the security of the entire device. Mobile application security solutions incorporate malware detection and prevention mechanisms to identify and mitigate the risks associated with malicious applications.

Growing Concerns about Mobile Application Vulnerabilities

The increasing prevalence of mobile applications has raised significant concerns regarding the potential security vulnerabilities associated with these applications. This is primarily due to the fact that mobile applications frequently handle sensitive user information, including personal data, financial details, and login credentials. The repercussions of any security breach or vulnerability in these applications can be severe, ranging from data breaches and financial losses to irreparable damage to a company's reputation. Consequently, organizations are now prioritizing investments in mobile application security solutions as a means to safeguard their applications and protect the valuable user data they handle. The rise of mobile applications has revolutionized the way we interact with technology, enabling us to access a wide range of services and functionalities conveniently from our smartphones and tablets. However, this convenience comes with inherent risks, as cybercriminals and malicious actors are constantly seeking ways to exploit vulnerabilities in these applications for their own gain. The potential consequences of a successful attack on a mobile application can be devastating, both for the users whose personal information is compromised and for the organizations responsible for the application's security.

Sensitive user information, such as personal identification details, financial records, and login credentials, is often stored and transmitted through mobile applications. This makes them attractive targets for hackers who can exploit security weaknesses to gain unauthorized access to this valuable data. Once in possession of such information, cybercriminals can engage in various malicious activities, including identity theft, financial fraud, and unauthorized access to other accounts or systems. Furthermore, a security breach or vulnerability in a mobile application can have far-reaching consequences for the organization behind it. Apart from the immediate financial losses resulting from potential lawsuits, regulatory fines, and compensation claims, the long-term damage to a company's reputation can be even more detrimental. Users are becoming increasingly aware of the importance of

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data security and are less likely to trust organizations that fail to adequately protect their personal information. This loss of trust can lead to a significant decline in user adoption and engagement, ultimately impacting the organization's bottom line. To mitigate these risks, organizations are now investing in robust mobile application security solutions. These solutions encompass a range of measures, including secure coding practices, encryption of sensitive data, regular security audits and penetration testing, and the implementation of multi-factor authentication. Additionally, organizations are adopting secure development frameworks and following industry best practices to ensure that security is integrated into the entire application development lifecycle.

Increasing Sophistication of Mobile Application Threats

Mobile application threats have evolved into increasingly sophisticated forms, with hackers employing advanced techniques to exploit vulnerabilities within mobile applications. These threats encompass a wide range of malicious activities, including the distribution of malware, phishing attacks that aim to deceive users into disclosing sensitive information, unauthorized access to confidential data, and the leakage of critical information. In response to this evolving threat landscape, organizations are recognizing the imperative need for robust mobile application security solutions. These solutions are designed to not only identify but also effectively counteract these risks. As a result, there is a growing demand for advanced mobile application security solutions equipped with real-time threat detection and prevention capabilities. These solutions are essential for safeguarding the integrity of mobile applications and the sensitive data they handle. By providing proactive defense mechanisms, such as continuous monitoring and rapid threat response, organizations can mitigate the risks associated with mobile app vulnerabilities. In this rapidly changing security landscape, the ability to detect and thwart threats as they emerge is crucial, and advanced mobile application security solutions are at the forefront of this defense, ensuring that businesses and users alike can confidently harness the power of mobile technology while minimizing the associated security risks.

Stringent Regulatory Requirements

Regulatory authorities worldwide have increasingly acknowledged the critical significance of mobile application security, prompting the implementation of stringent regulations aimed at safeguarding user data. A notable example is the General Data Protection Regulation (GDPR) enacted in Europe, which imposes stringent requirements on organizations to ensure the secure handling of user data and mandates prompt reporting of any data breaches. Non-compliance with these regulations can lead to substantial fines and legal repercussions. In response to this regulatory landscape, organizations are proactively channeling their efforts and resources into mobile application security solutions. These solutions serve as a linchpin in achieving compliance with these stringent regulations, mitigating potential penalties, and maintaining legal integrity. By investing in robust mobile application security solutions, organizations can not only fortify the protection of sensitive user data but also demonstrate their commitment to adhering to regulatory requirements. This proactive approach not only minimizes the risk of legal consequences but also enhances trust and credibility among users, fostering stronger relationships in an era where data privacy and security are paramount concerns. As the regulatory landscape continues to evolve, mobile application security remains a pivotal component of an organization's compliance strategy, ensuring that user data is handled with the utmost care and in accordance with prevailing data protection regulations.

Increasing Adoption of Bring Your Own Device (BYOD) Policies

The widespread adoption of Bring Your Own Device (BYOD) policies within organizations has significantly contributed to the heightened demand for mobile application security solutions. BYOD policies empower employees to utilize their personal devices for work-related tasks, offering advantages like increased productivity and flexibility. However, this paradigm shift also ushers in security vulnerabilities, as personal devices may not adhere to the same stringent security standards as corporate-issued devices. This dichotomy necessitates a proactive approach by organizations to mitigate these potential risks. Consequently, there has been a surge in the implementation of mobile application security solutions designed to fortify corporate data's security on personal devices while simultaneously enforcing rigorous security protocols. By leveraging these solutions, organizations can effectively strike a balance between the advantages of BYOD policies and safeguarding sensitive corporate data. These security measures help ensure that data remains protected and compliant with organizational security policies, regardless of the device it is accessed from. This proactive stance not only bolsters data security but also sustains the productivity and flexibility benefits associated with BYOD policies. As BYOD trends continue to proliferate across industries, mobile application security solutions play a pivotal role in addressing the unique security challenges posed by personal device usage within the corporate landscape.

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Key Market Challenges

Lack of Awareness and Understanding

The global mobile application security market faces a significant challenge in terms of limited awareness and understanding among organizations regarding the importance and advantages of adopting robust security solutions for mobile applications. Many businesses, especially smaller enterprises, may not fully grasp the potential risks and vulnerabilities associated with insecure mobile applications and the potential for security breaches. This lack of awareness can lead to a lack of investment in mobile application security, leaving organizations vulnerable to cyber threats and data breaches. Addressing this challenge requires comprehensive educational initiatives to highlight the critical role that mobile application security plays in protecting sensitive data, preventing unauthorized access, and maintaining user trust. Organizations need to recognize that inadequate security measures can result in financial losses, reputational damage, and legal consequences. Real-world examples and case studies showcasing the tangible benefits of mobile application security can help foster a deeper understanding of its significance.

Rapidly Evolving Threat Landscape

The mobile application security market faces the challenge of a rapidly evolving threat landscape. As technology advances, cybercriminals continuously develop new techniques and exploit vulnerabilities in mobile applications. This dynamic nature of threats requires organizations to stay updated with the latest security practices and technologies. Failure to do so can result in outdated security measures that are ineffective against emerging threats. To address this challenge, organizations need to prioritize continuous monitoring and proactive security measures. Regular security assessments, vulnerability scanning, and penetration testing can help identify and mitigate potential vulnerabilities in mobile applications. Additionally, staying informed about the latest security trends and collaborating with security experts can provide valuable insights into emerging threats and effective countermeasures.

Balancing Security and User Experience

Another challenge in the global mobile application security market is striking the right balance between security and user experience. While robust security measures are essential for protecting sensitive data, overly stringent security measures can negatively impact the user experience, leading to frustration and abandonment of mobile applications. Organizations need to implement security measures that are effective yet seamless, ensuring that users can access and use mobile applications without unnecessary barriers. This requires a user-centric approach to mobile application security, where security features are integrated seamlessly into the application's design and functionality. User-friendly authentication methods, such as biometrics or multi-factor authentication, can enhance security without compromising the user experience. Striking this balance is crucial to ensure that mobile applications are both secure and user-friendly, fostering user trust and engagement.

Adapting to Diverse Mobile Platforms and Technologies

The global mobile application security market faces the challenge of adapting to diverse mobile platforms and technologies. With a wide range of operating systems, device types, and application frameworks, ensuring consistent and effective security across different platforms can be complex. Organizations need to invest in security solutions that are compatible with various mobile platforms and technologies, ensuring comprehensive protection regardless of the device or operating system used. Additionally, staying updated with the latest security guidelines and best practices for each platform is essential to address platform-specific vulnerabilities effectively. Collaboration with mobile platform providers and security experts can provide valuable insights and guidance in navigating this challenge.

Continuous Innovation and Adaptation

The mobile application security market is characterized by continuous innovation and adaptation. As new technologies, such as 5G and Internet of Things (IoT), gain prominence, the security landscape evolves accordingly. Organizations need to embrace a culture of continuous improvement and innovation to stay ahead of emerging threats and security challenges. This requires investing in research and development to develop advanced security solutions that can effectively address the evolving security needs of mobile applications. Collaboration with industry partners, security researchers, and technology providers can foster innovation and ensure that organizations are equipped with the latest security technologies and practices.

Key Market Trends

Rise in Mobile Application Security Threats

The global market for mobile application security is witnessing a rise in the number of threats targeting mobile apps. As mobile

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devices become increasingly popular and essential for everyday activities, hackers are continuously developing sophisticated techniques to exploit vulnerabilities in mobile applications. These threats include data breaches, unauthorized access to sensitive information, malware attacks, and identity theft. Consequently, there is a growing demand for advanced mobile application security solutions that can effectively detect and mitigate these evolving threats. In response to this demand, security vendors are focusing on developing intelligent and adaptive solutions that leverage technologies such as artificial intelligence (AI) and machine learning (ML) to enhance their threat detection capabilities. By analyzing vast amounts of data, these solutions can identify patterns and detect anomalies in real-time, enabling organizations to respond swiftly to emerging threats. The goal is to provide organizations with proactive defense mechanisms that can adapt to the ever-changing threat landscape and protect sensitive data on mobile applications.

Shift towards Cloud-based Mobile Application Security Solutions

The global market is experiencing a significant shift towards cloud-based mobile application security solutions. This shift is driven by the increasing adoption of cloud computing and the migration of mobile applications to the cloud. Organizations are now seeking security solutions that can seamlessly integrate with their cloud infrastructure to ensure comprehensive security for their mobile applications.

Cloud-based mobile application security solutions offer several advantages. Firstly, they provide scalability, allowing organizations to easily adjust their resources based on the changing demands of their mobile applications. This scalability ensures that the security solution can handle varying levels of traffic and effectively protect the applications during peak usage periods.

Cloud-based mobile application security solutions also offer flexibility. They can be easily deployed and managed across multiple cloud environments, providing organizations with the freedom to choose the cloud platform that best suits their needs. This flexibility enables seamless integration with existing cloud infrastructure and ensures that the security solution can adapt to the specific requirements of the organization.

Integration of Artificial Intelligence and Machine Learning

The integration of artificial intelligence (AI) and machine learning (ML) technologies into mobile application security solutions is a significant trend in the market. AI and ML algorithms can analyze vast amounts of data, identify patterns, and detect anomalies in real-time, enabling security solutions to adapt and respond to evolving threats effectively. These advanced technologies enhance the accuracy and efficiency of mobile application security solutions, reducing false positives and false negatives. Security vendors are investing in AI and ML capabilities to enhance threat detection, automate security operations, and provide proactive defense against emerging threats in the mobile application space.

Segmental Insights

Solution Insights

The software segment accounted for the largest market share of 63.9% in 2022. Mobile application software is expected to gain significant momentum as key operators are involved in taking strategic decisions to enhance their security offerings in this segment. For instance, in September 2022, Nokia announced the strengthening of its software portfolio across the security and automation areas. Furthermore, the company has introduced the IGNITE Digital Ecosystem to bring application partners and customers together to accelerate the innovation of security, monetization, and automation solutions.

The services segment is anticipated to expand at a CAGR of 25.1% during the forecast period. Mobile application security, as a service, is gaining popularity among organizations, depending upon third-party application security as a service. For instance, in November 2022, Data Theorem, Inc., an application security provider, announced a strategic partnership with AppOmni, a SaaS security company. Thus, organizations developing their own applications while depending on third-party and first-party SaaS and APIs can get access to unified application security posture management offerings. It is designed to provide centralized visibility, data access management, and advanced security controls that can be seamlessly integrated across the SaaS environment.

Services Insights

The professional services segment accounted for a market share of 56.2% in 2022. Mobile applications are gaining traction in this segment, as application developers and service providers, in order to ensure customer safety and counter potential threats, approach key mobile application security providers. For instance, Wipro, a technology & consulting company, announced a collaboration with Onapsis, a provider of business application cybersecurity and compliance, in January 2023, with the aim to eliminate the risk of cyber threats, ensuring business growth, along with maintaining a smooth digital transformation journey for

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organizations.

The managed services segment is expected to advance at a substantial growth rate of 24.5% during the forecast period. Ensuring the safety and security of applications, during and after their launch, is becoming a critical factor. Furthermore, the growing initiatives being witnessed in this segment are expected to drive the market demand. For instance, in April 2023, Aeries Technology, a professional services and consulting partner for organizations, announced the launch of its cyber security managed services offering, which provides organizations with access to industry-leading cyber security services, including application security services. Such initiatives are expected to drive the segment demand for the mobile application security market over the forecast period.

Deployment Insights

The cloud-based segment accounted for a market share of 55.8% in 2022. Cloud-based mobile application security is gaining momentum, as it allows app developers to leverage these security applications based on their requirements and time. For instance, in March 2022, Promon partnered with F5, inc. Both these companies are involved in providing application security solutions and services. The companies undertook this partnership to offer a fast and easy implementation of the latter's Distributed Cloud Bot Defense, developed for mobile applications, which can be accessed through Promon's hassle-free, no-code, software development kit integration platform. It allows application developers to secure their Android and iOS apps without touching the existing code. Once the app is secured, it can be distributed across public app stores.

The on-premise segment is anticipated to witness a growth rate of 22.3% during the forecast period. On-premise mobile application security offers complete control to the organization for ensuring the security of applications from malware and cyber threats. Along with this, it offers both specific and custom solutions to developers and application users to create a healthy ecosystem for app users. The rising demand for remote work practices and the expanding acceptance of hybrid work culture has led to the sharing of data in a large volume across a series of unsecured applications. Thus, the on-premise mobile application security ensures the safety and security of applications used by the organization and its employees.

Regional Insights

North America held the major revenue share of 37.1% of the target market in 2022. In North America, the market for mobile application security is expected to witness positive traction owing to the surging demand for smartphones, higher internet penetration, the constantly evolving e-commerce space, and hybrid work policies. Furthermore, the region is defined by the presence of key industry players, including IBM Corporation, Microsoft Corporation, Google, and VMware Inc. These companies have a range of mobile application security offerings such as threat intelligence, routine application update, monitoring, application management, and security assessment, which is expected to open several growth opportunities in the North American market.

Asia Pacific is anticipated to emerge as the fastest-developing regional market at a CAGR of 27.0% during the forecast period. This is on account of the rapid adoption of mobile phones, growing government initiatives, the rapid rollout of 5G technology, and the large customer base of e-commerce, gaming, and social media in the region. These applications are constantly exposed to cyber threats as they share high traffic, customer data, and critical user information.

To safeguard the users from these growing threats, application developers and service providers are constantly making strategic decisions by investing and partnering with leading mobile application security providers in the region. Thus, the aforementioned factors are expected to drive the market demand for mobile application security in the Asia Pacific region.

Key Market Players

Google

NowSecure

VMware

Ivanti

Sophos

Cisco Systems

Broadcom, Inc.

Micro Focus

Indusface

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Data Theorem

Onapsis

Aeries

Report Scope:

In this report, the Global Mobile Application Security Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

? Mobile Application Security Market, By Solution:

o Software

o Services

? Mobile Application Security Market, By Services:

o Professional Services

o Managed Services

? Mobile Application Security Market, By Professional Services:

o Consulting

o Integration

o Support and Maintenance

? Mobile Application Security Market, By Deployment:

o Cloud

o On-premises

? Mobile Application Security Market, By Enterprise Size:

o Small and medium-sized enterprises

o Large enterprises

? Mobile Application Security Market, By Vertical:

o BFSI

o IT and Telecom

o Retail

o Healthcare

o Education

o Transportation and Logistics

o Manufacturing

o Government

o Others

? Mobile Application Security Market, By Region:

o North America

? United States

? Canada

? Mexico

o Europe

? France

? United Kingdom

? Italy

? Germany

? Spain

? Belgium

o Asia-Pacific

? China

? India

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- ?[]Japan
- ?[]Australia
- ?[]South Korea
- ?[]Indonesia
- ?[]Vietnam
- o[]South America
- ?[]Brazil
- ?[]Argentina
- ?[]Colombia
- ?[]Chile
- ?[]Peru
- o[]Middle East & Africa
- ?[]South Africa
- ?[]Saudi Arabia
- ?[]UAE
- ?[]Turkey
- ?[]Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Mobile Application Security Market.

Available Customizations:

Global Mobile Application Security 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).

Table of Contents:

- 1.[]Product Overview
 - 1.1.[]Market Definition
 - 1.2.[]Scope of the Market
 - 1.2.1.[]Markets Covered
 - 1.2.2.[]Years Considered for Study
 - 1.2.3.[]Key Market Segmentations
- 2.[]Research Methodology
 - 2.1.[]Objective of the Study
 - 2.2.[]Baseline Methodology
 - 2.3.[]Formulation of the Scope
 - 2.4.[]Assumptions and Limitations
 - 2.5.[]Sources of Research
 - 2.5.1.[]Secondary Research
 - 2.5.2.[]Primary Research
 - 2.6.[]Approach for the Market Study
 - 2.6.1.[]The Bottom-Up Approach
 - 2.6.2.[]The Top-Down Approach
 - 2.7.[]Methodology Followed for Calculation of Market Size & Market Shares
 - 2.8.[]Forecasting Methodology
 - 2.8.1.[]Data Triangulation & Validation
- 3.[]Executive Summary

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- 4. Impact of COVID-19 on Global Mobile Application Security Market
- 5. Voice of Customer
- 6. Global Mobile Application Security Market Overview
- 7. Global Mobile Application Security Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Solution (Software, Service)
 - 7.2.2. By Services (Professional Services, Managed Services)
 - 7.2.3. By Professional Services (Consulting, Integration, Support and Maintenance)
 - 7.2.4. By Deployment (Cloud, On-premise)
 - 7.2.5. By Enterprise Size (Small and medium-sized enterprises, Large enterprises)
 - 7.2.6. By Vertical (BFSI, IT and Telecom, Retail, Healthcare, Education, Transportation and Logistics, Manufacturing, Government, Others)
 - 7.2.7. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
 - 7.3. By Company (2022)
 - 7.4. Market Map
- 8. North America Mobile Application Security Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Solution
 - 8.2.2. By Services
 - 8.2.3. By Professional Services
 - 8.2.4. By Deployment
 - 8.2.5. By Enterprise Size
 - 8.2.6. By Vertical
 - 8.2.7. By Country
 - 8.3. North America: Country Analysis
 - 8.3.1. United States Mobile Application Security Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Solution
 - 8.3.1.2.2. By Services
 - 8.3.1.2.3. By Professional Services
 - 8.3.1.2.4. By Deployment
 - 8.3.1.2.5. By Enterprise Size
 - 8.3.1.2.6. By Vertical
 - 8.3.2. Canada Mobile Application Security Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Solution
 - 8.3.2.2.2. By Services
 - 8.3.2.2.3. By Professional Services
 - 8.3.2.2.4. By Deployment

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- 8.3.2.2.5. By Enterprise Size
- 8.3.2.2.6. By Vertical
- 8.3.3. Mexico Mobile Application Security Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Solution
 - 8.3.3.2.2. By Services
 - 8.3.3.2.3. By Professional Services
 - 8.3.3.2.4. By Deployment
 - 8.3.3.2.5. By Enterprise Size
 - 8.3.3.2.6. By Vertical
- 9. Europe Mobile Application Security Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Solution
 - 9.2.2. By Services
 - 9.2.3. By Professional Services
 - 9.2.4. By Deployment
 - 9.2.5. By Enterprise Size
 - 9.2.6. By Vertical
 - 9.2.7. By Country
 - 9.3. Europe: Country Analysis
 - 9.3.1. Germany Mobile Application Security Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Solution
 - 9.3.1.2.2. By Services
 - 9.3.1.2.3. By Professional Services
 - 9.3.1.2.4. By Deployment
 - 9.3.1.2.5. By Enterprise Size
 - 9.3.1.2.6. By Vertical
 - 9.3.2. France Mobile Application Security Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Solution
 - 9.3.2.2.2. By Services
 - 9.3.2.2.3. By Professional Services
 - 9.3.2.2.4. By Deployment
 - 9.3.2.2.5. By Enterprise Size
 - 9.3.2.2.6. By Vertical
 - 9.3.3. United Kingdom Mobile Application Security Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value

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- 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Solution
 - 9.3.3.2.2. By Services
 - 9.3.3.2.3. By Professional Services
 - 9.3.3.2.4. By Deployment
 - 9.3.3.2.5. By Enterprise Size
 - 9.3.3.2.6. By Vertical
- 9.3.4. Italy Mobile Application Security Market Outlook
 - 9.3.4.1. Market Size & Forecast
 - 9.3.4.1.1. By Value
 - 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Solution
 - 9.3.4.2.2. By Services
 - 9.3.4.2.3. By Professional Services
 - 9.3.4.2.4. By Deployment
 - 9.3.4.2.5. By Enterprise Size
 - 9.3.4.2.6. By Vertical
 - 9.3.5. Spain Mobile Application Security Market Outlook
 - 9.3.5.1. Market Size & Forecast
 - 9.3.5.1.1. By Value
 - 9.3.5.2. Market Share & Forecast
 - 9.3.5.2.1. By Solution
 - 9.3.5.2.2. By Services
 - 9.3.5.2.3. By Professional Services
 - 9.3.5.2.4. By Deployment
 - 9.3.5.2.5. By Enterprise Size
 - 9.3.5.2.6. By Vertical
 - 9.3.6. Belgium Mobile Application Security Market Outlook
 - 9.3.6.1. Market Size & Forecast
 - 9.3.6.1.1. By Value
 - 9.3.6.2. Market Share & Forecast
 - 9.3.6.2.1. By Solution
 - 9.3.6.2.2. By Services
 - 9.3.6.2.3. By Professional Services
 - 9.3.6.2.4. By Deployment
 - 9.3.6.2.5. By Enterprise Size
 - 9.3.6.2.6. By Vertical
 - 10. South America Mobile Application Security Market Outlook
 - 10.1. Market Size & Forecast
 - 10.1.1. By Value
 - 10.2. Market Share & Forecast
 - 10.2.1. By Solution
 - 10.2.2. By Services
 - 10.2.3. By Professional Services
 - 10.2.4. By Deployment
 - 10.2.5. By Enterprise Size
 - 10.2.6. By Vertical

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www.scotts-international.com

- 10.2.7. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Mobile Application Security Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Solution
 - 10.3.1.2.2. By Services
 - 10.3.1.2.3. By Professional Services
 - 10.3.1.2.4. By Deployment
 - 10.3.1.2.5. By Enterprise Size
 - 10.3.1.2.6. By Vertical
 - 10.3.2. Colombia Mobile Application Security Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Solution
 - 10.3.2.2.2. By Services
 - 10.3.2.2.3. By Professional Services
 - 10.3.2.2.4. By Deployment
 - 10.3.2.2.5. By Enterprise Size
 - 10.3.2.2.6. By Vertical
 - 10.3.3. Argentina Mobile Application Security Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Solution
 - 10.3.3.2.2. By Services
 - 10.3.3.2.3. By Professional Services
 - 10.3.3.2.4. By Deployment
 - 10.3.3.2.5. By Enterprise Size
 - 10.3.3.2.6. By Vertical
 - 10.3.4. Chile Mobile Application Security Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Solution
 - 10.3.4.2.2. By Services
 - 10.3.4.2.3. By Professional Services
 - 10.3.4.2.4. By Deployment
 - 10.3.4.2.5. By Enterprise Size
 - 10.3.4.2.6. By Vertical
 - 10.3.5. Peru Mobile Application Security Market Outlook
 - 10.3.5.1. Market Size & Forecast
 - 10.3.5.1.1. By Value
 - 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Solution

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- 10.3.5.2.2.□By Services
- 10.3.5.2.3.□By Professional Services
- 10.3.5.2.4.□By Deployment
- 10.3.5.2.5.□By Enterprise Size
- 10.3.5.2.6.□By Vertical
- 11.□Middle East & Africa Mobile Application Security Market Outlook
- 11.1.□Market Size & Forecast
- 11.1.1.□By Value
- 11.2.□Market Share & Forecast
- 11.2.1.□By Solution
- 11.2.2.□By Services
- 11.2.3.□By Professional Services
- 11.2.4.□By Deployment
- 11.2.5.□By Enterprise Size
- 11.2.6.□By Vertical
- 11.2.7.□By Country
- 11.3.□Middle East & Africa: Country Analysis
- 11.3.1.□Saudi Arabia Mobile Application Security Market Outlook
- 11.3.1.1.□Market Size & Forecast
- 11.3.1.1.1.□By Value
- 11.3.1.2.□Market Share & Forecast
- 11.3.1.2.1.□By Solution
- 11.3.1.2.2.□By Services
- 11.3.1.2.3.□By Professional Services
- 11.3.1.2.4.□By Deployment
- 11.3.1.2.5.□By Enterprise Size
- 11.3.1.2.6.□By Vertical
- 11.3.2.□UAE Mobile Application Security Market Outlook
- 11.3.2.1.□Market Size & Forecast
- 11.3.2.1.1.□By Value
- 11.3.2.2.□Market Share & Forecast
- 11.3.2.2.1.□By Solution
- 11.3.2.2.2.□By Services
- 11.3.2.2.3.□By Professional Services
- 11.3.2.2.4.□By Deployment
- 11.3.2.2.5.□By Enterprise Size
- 11.3.2.2.6.□By Vertical
- 11.3.3.□South Africa Mobile Application Security Market Outlook
- 11.3.3.1.□Market Size & Forecast
- 11.3.3.1.1.□By Value
- 11.3.3.2.□Market Share & Forecast
- 11.3.3.2.1.□By Solution
- 11.3.3.2.2.□By Services
- 11.3.3.2.3.□By Professional Services
- 11.3.3.2.4.□By Deployment
- 11.3.3.2.5.□By Enterprise Size
- 11.3.3.2.6.□By Vertical

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- 11.3.4. Turkey Mobile Application Security Market Outlook
 - 11.3.4.1. Market Size & Forecast
 - 11.3.4.1.1. By Value
 - 11.3.4.2. Market Share & Forecast
 - 11.3.4.2.1. By Solution
 - 11.3.4.2.2. By Services
 - 11.3.4.2.3. By Professional Services
 - 11.3.4.2.4. By Deployment
 - 11.3.4.2.5. By Enterprise Size
 - 11.3.4.2.6. By Vertical
- 11.3.5. Israel Mobile Application Security Market Outlook
 - 11.3.5.1. Market Size & Forecast
 - 11.3.5.1.1. By Value
 - 11.3.5.2. Market Share & Forecast
 - 11.3.5.2.1. By Solution
 - 11.3.5.2.2. By Services
 - 11.3.5.2.3. By Professional Services
 - 11.3.5.2.4. By Deployment
 - 11.3.5.2.5. By Enterprise Size
 - 11.3.5.2.6. By Vertical
- 12. Asia Pacific Mobile Application Security Market Outlook
 - 12.1. Market Size & Forecast
 - 12.1.1. By Solution
 - 12.1.2. By Services
 - 12.1.3. By Professional Services
 - 12.1.4. By Deployment
 - 12.1.5. By Enterprise Size
 - 12.1.6. By Vertical
 - 12.1.7. By Country
 - 12.2. Asia-Pacific: Country Analysis
 - 12.2.1. China Mobile Application Security Market Outlook
 - 12.2.1.1. Market Size & Forecast
 - 12.2.1.1.1. By Value
 - 12.2.1.2. Market Share & Forecast
 - 12.2.1.2.1. By Solution
 - 12.2.1.2.2. By Services
 - 12.2.1.2.3. By Professional Services
 - 12.2.1.2.4. By Deployment
 - 12.2.1.2.5. By Enterprise Size
 - 12.2.1.2.6. By Vertical
 - 12.2.2. India Mobile Application Security Market Outlook
 - 12.2.2.1. Market Size & Forecast
 - 12.2.2.1.1. By Value
 - 12.2.2.2. Market Share & Forecast
 - 12.2.2.2.1. By Solution
 - 12.2.2.2.2. By Services
 - 12.2.2.2.3. By Professional Services

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- 12.2.2.2.4.□By Deployment
- 12.2.2.2.5.□By Enterprise Size
- 12.2.2.2.6.□By Vertical
- 12.2.3.□Japan Mobile Application Security Market Outlook
- 12.2.3.1.□Market Size & Forecast
- 12.2.3.1.1.□By Value
- 12.2.3.2.□Market Share & Forecast
- 12.2.3.2.1.□By Solution
- 12.2.3.2.2.□By Services
- 12.2.3.2.3.□By Professional Services
- 12.2.3.2.4.□By Deployment
- 12.2.3.2.5.□By Enterprise Size
- 12.2.3.2.6.□By Vertical
- 12.2.4.□South Korea Mobile Application Security Market Outlook
- 12.2.4.1.□Market Size & Forecast
- 12.2.4.1.1.□By Value
- 12.2.4.2.□Market Share & Forecast
- 12.2.4.2.1.□By Solution
- 12.2.4.2.2.□By Services
- 12.2.4.2.3.□By Professional Services
- 12.2.4.2.4.□By Deployment
- 12.2.4.2.5.□By Enterprise Size
- 12.2.4.2.6.□By Vertical
- 12.2.5.□Australia Mobile Application Security Market Outlook
- 12.2.5.1.□Market Size & Forecast
- 12.2.5.1.1.□By Value
- 12.2.5.2.□Market Share & Forecast
- 12.2.5.2.1.□By Solution
- 12.2.5.2.2.□By Services
- 12.2.5.2.3.□By Professional Services
- 12.2.5.2.4.□By Deployment
- 12.2.5.2.5.□By Enterprise Size
- 12.2.5.2.6.□By Vertical
- 12.2.6.□Indonesia Mobile Application Security Market Outlook
- 12.2.6.1.□Market Size & Forecast
- 12.2.6.1.1.□By Value
- 12.2.6.2.□Market Share & Forecast
- 12.2.6.2.1.□By Solution
- 12.2.6.2.2.□By Services
- 12.2.6.2.3.□By Professional Services
- 12.2.6.2.4.□By Deployment
- 12.2.6.2.5.□By Enterprise Size
- 12.2.6.2.6.□By Vertical
- 12.2.7.□Vietnam Mobile Application Security Market Outlook
- 12.2.7.1.□Market Size & Forecast
- 12.2.7.1.1.□By Value
- 12.2.7.2.□Market Share & Forecast

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- 12.2.7.2.1. By Solution
- 12.2.7.2.2. By Services
- 12.2.7.2.3. By Professional Services
- 12.2.7.2.4. By Deployment
- 12.2.7.2.5. By Enterprise Size
- 12.2.7.2.6. By Vertical
- 13. Market Dynamics
- 13.1. Drivers
- 13.2. Challenges
- 14. Market Trends and Developments
- 15. Company Profiles
- 15.1. Google
- 15.1.1. Business Overview
- 15.1.2. Key Revenue and Financials
- 15.1.3. Recent Developments
- 15.1.4. Key Personnel/Key Contact Person
- 15.1.5. Key Product/Services Offered
- 15.2. NowSecure
- 15.2.1. Business Overview
- 15.2.2. Key Revenue and Financials
- 15.2.3. Recent Developments
- 15.2.4. Key Personnel/Key Contact Person
- 15.2.5. Key Product/Services Offered
- 15.3. VMware
- 15.3.1. Business Overview
- 15.3.2. Key Revenue and Financials
- 15.3.3. Recent Developments
- 15.3.4. Key Personnel/Key Contact Person
- 15.3.5. Key Product/Services Offered
- 15.4. Ivanti
- 15.4.1. Business Overview
- 15.4.2. Key Revenue and Financials
- 15.4.3. Recent Developments
- 15.4.4. Key Personnel/Key Contact Person
- 15.4.5. Key Product/Services Offered
- 15.5. Sophos
- 15.5.1. Business Overview
- 15.5.2. Key Revenue and Financials
- 15.5.3. Recent Developments
- 15.5.4. Key Personnel/Key Contact Person
- 15.5.5. Key Product/Services Offered
- 15.6. Cisco Systems
- 15.6.1. Business Overview
- 15.6.2. Key Revenue and Financials
- 15.6.3. Recent Developments
- 15.6.4. Key Personnel/Key Contact Person
- 15.6.5. Key Product/Services Offered

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- 15.7. □Broadcom, Inc.
 - 15.7.1. □Business Overview
 - 15.7.2. □Key Revenue and Financials
 - 15.7.3. □Recent Developments
 - 15.7.4. □Key Personnel/Key Contact Person
 - 15.7.5. □Key Product/Services Offered
- 15.8. □Micro Focus
 - 15.8.1. □Business Overview
 - 15.8.2. □Key Revenue and Financials
 - 15.8.3. □Recent Developments
 - 15.8.4. □Key Personnel/Key Contact Person
 - 15.8.5. □Key Product/Services Offered
- 15.9. □Indusface
 - 15.9.1. □Business Overview
 - 15.9.2. □Key Revenue and Financials
 - 15.9.3. □Recent Developments
 - 15.9.4. □Key Personnel/Key Contact Person
 - 15.9.5. □Key Product/Services Offered
- 15.10. □Data Theorem
 - 15.10.1. □Business Overview
 - 15.10.2. □Key Revenue and Financials
 - 15.10.3. □Recent Developments
 - 15.10.4. □Key Personnel/Key Contact Person
 - 15.10.5. □Key Product/Services Offered
- 15.11. □Onapsis
 - 15.11.1. □Business Overview
 - 15.11.2. □Key Revenue and Financials
 - 15.11.3. □Recent Developments
 - 15.11.4. □Key Personnel/Key Contact Person
 - 15.11.5. □Key Product/Services Offered
- 15.12. □Aeries Technology
 - 15.12.1. □Business Overview
 - 15.12.2. □Key Revenue and Financials
 - 15.12.3. □Recent Developments
 - 15.12.4. □Key Personnel/Key Contact Person
 - 15.12.5. □Key Product/Services Offered
- 16. □Strategic Recommendations
- 17. □About Us & Disclaimer

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