

Zero Trust Architecture Market by Offering (Solutions and Services), Organization Size (SMEs and Large Enterprises), Deployment Mode (Cloud and On-Premises), Vertical (BFSI, IT & ITeS, Healthcare) and Region - Global Forecast to 2028

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Report description:

The global zero trust architecture market size is projected to grow from USD 17.3 billion in 2023 to USD 38.5 billion by 2028 at a Compound Annual Growth Rate (CAGR) of 17.3% during the forecast period. Several key factors drive the zero trust architecture market. One of the drivers is the development of a threat landscape marked by advanced malware and ransomware, necessitating robust security measures like network segmentation. Combining digital transformation and cloud adoption expands the attack surface, making zero trust's "never trust, always verify" approach essential. Furthermore, regulatory compliance requirements, like GDPR and HIPAA, further boost zero trust adoption, ensuring adherence to privacy standards and facilitating audits. This shift from traditional perimeter security models offers enhanced protection, continuous verification, and improved governance, making it a pivotal market force.

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

The IT & ITeS vertical boasts the largest market share in the zero trust architecture market, primarily because it handles vast amounts of sensitive data, including customer financial information, intellectual property, and trade secrets. This data is a prime target for cybercriminals, making it a crucial safeguard tool. Moreover, the vertical's complex IT environments, characterized by diverse devices, applications, and networks, pose challenges for traditional security methods. Zero trust simplifies security in such intricate setups. Furthermore, stringent compliance requirements, like PCI DSS and GDPR, are standard for IT & ITeS organizations and aid in achieving comprehensive security compliance. Additionally, although beneficial for efficiency and agility, the rising adoption of cloud computing introduces new security risks, which helps mitigate them. This collective advantage further solidifies the IT & ITeS vertical's dominance in the zero trust architecture market.

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"By Organization size, the large enterprises segment accounts for a larger market share."

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Large enterprises dominate the zero trust architecture market due to the intricate IT environments, replete with diverse devices, applications, and networks. This complexity poses challenges for traditional security measures, making zero trust architecture an ideal solution for streamlining security in such settings. These large corporations handle substantial high-value data and assets, making them attractive targets for cyber threats. Zero trust architecture protects sensitive customer financial information, intellectual property, and trade secrets. Moreover, large enterprises often face stringent compliance requirements, including PCI DSS, HIPAA, and GDPR, which help them meet comprehensively. With substantial security budgets, these organizations can invest in comprehensive zero trust architecture solutions, a vital advantage as they increasingly adopt cloud computing, introducing new security risks that zero trust architecture mitigates.

"US to grow at the highest CAGR for North America zero trust architecture market"

The US is experiencing significant growth in the zero trust architecture market due to the high demand from large and sophisticated organizations like government agencies, financial institutions, and healthcare providers. This demand is driven by the escalating cyberattack threats and the need to enhance security. Furthermore, a robust regulatory landscape, exemplified by the Cybersecurity Maturity Model Certification (CMMC) program, compels organizations to adopt zero trust principles. The availability of innovative solutions from leading vendors like Palo Alto Networks, Microsoft, and Zscaler further fuels this growth. Moreover, the widespread awareness of zero trust security, supported by factors like increasing cyberattacks and the NIST Cybersecurity Framework, sustains this upward trajectory.

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 - 25%
- 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 architecture 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), Netskope (US), Perimeter 81 (US), Twingate (US), Appgate (US), Zero Networks (Israel), Versa Networks (US), Axis Security (US), Ivanti (US), NordLayer (US), and GoodAccess (Czech Republic).

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

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Research Coverage

The report segments the zero trust architecture market. It forecasts its size by Offering (Solutions and Services), Organization Size (Small and Medium-Sized Enterprises and Large Enterprises), Deployment Mode (Cloud and On-premises), 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 & 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 with information on the closest approximations of the revenue numbers for the overall zero trust architecture 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 (evolution of cyber threats spurs growth of robust network segmentation, digital transformation and cloud adoption drive zero trust architecture demand, rising emphasis on regulatory compliance driving the adoption of zero trust architecture, shifting from perimeter security to embrace zero trust architecture drives the market), restraints (legacy systems impact zero trust adoption and complexity and cost of implementation), opportunities (growth in IoT adoption creates

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opportunities for zero trust architecture, expanding possibilities in zero trust architecture and services, and MSS demand drives zero trust architecture growth opportunity), and challenges (diminishing strength of conventional security models and fragmented security operations in zero trust architecture)

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the zero trust architecture market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the zero trust architecture market across varied regions.
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the zero trust architecture 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 architecture market strategies.

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