

Critical Infrastructure Protection Market by Offering, Security Type (Physical Safety & Security (Video Surveillance Systems, Screening, and Scanning) and Cybersecurity (Encryption, Threat Intelligence)), Vertical and Region - Global Forecast to 2029

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Report description:

The global critical infrastructure protection market size is projected to grow from USD 148.1 billion in 2024 to USD 178.3 billion by 2029 at a Compound Annual Growth Rate (CAGR) of 3.8% during the forecast period. The escalation of cyberattacks on critical infrastructure underscores the imperative for robust protection measures to safeguard national security and vital services. Simultaneously, government initiatives worldwide, led by agencies such as DHS and CISA in the U.S., drive the expansion of critical infrastructure protection through regulatory frameworks and collaborative efforts. Programs like NERC CIP standards in the U.S. and similar initiatives in Europe, India, and Australia emphasize cybersecurity and resilience, reinforcing the global push to fortify critical infrastructure against evolving threats and ensure uninterrupted operations.

"By vertical, the telecom segment accounts for the highest CAGR during the forecast period."

The telecom segment grows at the fastest rate in the Critical Infrastructure Protection (CIP) market due to the essential role of telecommunications in modern connectivity. As the backbone of communication networks, telecom systems require robust protection measures to ensure uninterrupted service delivery. The critical nature of this infrastructure is evident in the need to secure classified traffic through encryption and physical equipment protection. Moreover, vulnerabilities to natural disasters and cybersecurity threats, such as malicious content dissemination via mobile networks, emphasize the urgency for enhanced protection measures. Calls for classifying telecom equipment as critical infrastructure and advocating for legislation to safeguard essential assets highlight the growing recognition of the importance of fortifying telecom infrastructure against emerging threats. This increasing awareness drives the demand for comprehensive CIP solutions tailored to the unique challenges faced by the telecom sector.

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"By Solution, the hardware segment accounts for a larger market share."

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The hardware segment dominates the Critical Infrastructure Protection (CIP) market due to its crucial role in fortifying critical infrastructure against malicious threats. While software solutions are vulnerable to exploitation, hardware-based approaches offer essential protection for Computerized Information System (CIS) devices. Implementing CCTVs with advanced video analytics and biometric authentication enhances security by monitoring personnel access, while RADAR technology analyzes physical threats and devises strategies for mitigation. In high-security sectors like finance, military, and government, hardware solutions are indispensable for safeguarding critical infrastructure premises, ensuring robust protection against potential attacks and disruptions. This recognition of the importance of hardware-based security drives the demand for comprehensive hardware solutions tailored to the unique needs of critical infrastructure protection.

Breakdown of primaries

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

- By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%
- By Designation: C-level - 40% and Managers and Other Levels - 60%
- By Region: North America - 25%, Europe - 20%, Asia Pacific - 20%, Middle East & Africa - 20%, Latin America - 15%

Major vendors in the global critical infrastructure protection market include as BAE Systems (US), Lockheed Martin (US), General Dynamics (US), Northrop Grumman (US), Honeywell (US), Airbus (France), Thales (France), Hexagon AB (Sweden), Johnson Controls (US), Motorola Solutions (US), Axis Communications (Sweden), Forcepoint (US), Fortinet (US), Cisco (US), Huawei (China), G4S (UK), GE Vernova (US), NEC Corporation (Japan), Bruker Corporation (US), Fujitsu (Japan), Tenable (US), Rolta (India), Mission Secure (US), Optasense (UK), Teltronic (Spain), Waterfall Security Solutions (Israel), Westminster Group Plc (UK), Owl Cyber Defense Solutions (US), Achilles Heel Technologies (US), CIPS Security (US), Suprema Inc (South Korea), and SCADAfence (US).

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The study includes an in-depth competitive analysis of the key players in the critical infrastructure protection market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the critical infrastructure protection market and forecasts its size by Offering (Solutions (Hardware and Software) and Services (Professional Services and Managed Services), Security Type (Physical Security & Safety and Cybersecurity), Vertical (Financial Institutions, Government, Defense, Transport & Logistics, Energy & Power, Commercial Sector, Telecom, Chemicals & Manufacturing, Oil & Gas, and 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 critical infrastructure protection 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 (rising cyberattacks on critical infrastructure systems, government initiatives drive growth in critical infrastructure protection, and technological development drives evolution in critical infrastructure protection), restraints (lack of trained cybersecurity professionals and interoperability gap among critical infrastructure protection solutions), opportunities (rising adoption of internet of things and rising infrastructure investment spurs demand of enhanced protection measures), and challenges (supply chain vulnerabilities threatens critical infrastructure and high implementation and maintenance costs)

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- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the critical infrastructure protection market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the critical infrastructure protection market across varied regions.
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the critical infrastructure protection market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players BAE Systems (US), Lockheed Martin (US), General Dynamics (US), Northrop Grumman (US), Honeywell (US), among others, in the critical infrastructure protection market strategies.

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Critical Infrastructure Protection Market by Offering, Security Type (Physical Safety & Security (Video Surveillance Systems, Screening, and Scanning) and Cybersecurity (Encryption, Threat Intelligence)), Vertical and Region - Global Forecast to 2029

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