

Cloud-based Email Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Cloud-based Email Security Market size is estimated at USD 4.36 billion in 2025, and is expected to reach USD 8.46 billion by 2030, at a CAGR of 14.16% during the forecast period (2025-2030).

Key Highlights

- The emergence of the digital landscape has increased the significance of email as a pivotal communication tool. Yet, this ubiquity also makes email systems prime targets for cyberattacks. Integrated Cloud Email Security solutions are crafted to counteract these threats with advanced protective measures. The essence of Integrated Cloud Email Security solutions is highlighting their features, benefits, and distinctions from traditional solutions like secure email gateways (SEGs).
- Additionally, in February 2024, Mimecast, an AI-powered Email Security solution provider, reported Spamming, Phishing, and malware were the significant contributors to email threats worldwide in the fourth quarter of 2023, which shows the demand for cloud-based email security solutions in the market.
- Traditional email security measures and the default features of cloud-based email services mainly target common threats. They can effectively spot harmful content, including spam, malicious links, and counterfeit domains. However, these tools frequently struggle against advanced phishing tactics, notably business email compromise (BEC) and vendor email compromise (VEC). Distinct from standard phishing, these advanced attacks utilize "malicious intent" emails, employing text-based social engineering to trick recipients into revealing login credentials, disclosing confidential information, or approving fraudulent invoices, showing the market's requirement for cloud-based email security solutions.
- The risk of information loss is among the key challenges that hamper the market's growth globally. As more businesses increasingly migrate their email systems to the cloud, data security, privacy, and regulatory compliance concerns have increased. The perspective for information loss, whether through accidental deletion, unauthorized access, or sophisticated cyberattacks, poses a barrier to adopting these solutions.

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- The increasing adoption of digitalization strategy among the end-users to support their online business model, which has increased since the COVID-19 pandemic, has raised the risk of e-mail-based cyber attacks in the market, which would drive business opportunities for the market vendors.

Cloud-based Email Security Market Trends

Public Cloud Deployment Model Holds Significant Market Share

- Public cloud-based email security protects email systems through services hosted and managed by third-party providers like AWS, Google Cloud, and Microsoft Azure. According to Flexera Software, in 2024, 49% of the respondents are running significant workloads on Amazon Web Services (AWS). This arrangement allows businesses to access these services on a subscription basis and offers features such as advanced threat protection, data loss prevention, encryption, and compliance reporting. By leveraging cloud technology's scalability, flexibility, and cost-effectiveness, these solutions could help businesses mitigate the risk of cyber attacks and enhance their email security posture.
- The public cloud-hosted email security is usually suitable for businesses requiring lower upfront costs and rapid deployment, particularly for small and medium-sized enterprises (SMEs) with limited IT resources. However, concerns about data privacy and regulatory compliance may arise due to the shared nature of infrastructure in this type of cloud-based email security.
- These security solutions are being increasingly used due to their low cost. Unlike private cloud-based solutions, these solutions operate on a subscription or pay-as-you-go model, considerably reducing the need for large upfront capital investment.
- Small and mid-sized enterprises (SMEs) usually choose affordable and comprehensive security to avoid the costs of maintaining and updating their infrastructure. Additionally, public cloud solutions reduce the need for internal IT management and maintenance, enabling businesses to concentrate on their core operations while benefiting from high-level security. These advantages drive the global adoption of public cloud-based email security among SMEs across various industries.
- Moreover, as businesses expand and their email traffic and security needs increase, public cloud-based email security solutions become a compelling option for them. These solutions offer unparalleled scalability, allowing organizations to quickly and cost-effectively adjust their security infrastructure to meet changing demands. Consequently, businesses operating in dynamic environments or planning expansions benefit from these solutions, making them a preferred choice across various global industries, further propelling their demand in the market studied.

North America is Expected to Hold Significant Market Share

- Business email compromise (BEC) and phishing and in the United States, per the Identity Theft Resource Center, are highly widespread kinds of cyber attacks, resulting in data compromises. In 2023, these attacks made up around 18% of the total cyber attacks in the nation leading to a violation of personal data. As businesses face heightened risks of cyberattacks targeting sensitive personal and financial data, there is a growing need for advanced, scalable security solutions.
- Cloud-based email security solutions deliver real-time threat detection, automated updates, and protection against evolving attack methods. These capabilities make them crucial for businesses of all sizes. This trend is expected to boost adoption across industries, particularly significant for organizations that manage large volumes of personal data or must comply with regulatory requirements, thereby driving market growth.
- The frequency of cyber threats is rapidly gaining traction in Canada, and the impact is increasing alarmingly. It is evident from the 63,519 cybercrime incidents recorded in 2023 alone in Canada, impacting 41,988 victims and resulting in losses amounting to USD 569 million, according to the Canadian Anti-Fraud Centre. Phishing scams, data breaches, and other cyberattacks targeting businesses, government agencies, and individuals have made it imperative for organizations to strengthen their cybersecurity

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posture.

- The Canadian government demonstrates its commitment to national cybersecurity through initiatives like the Canadian Cyber Security Centre's guidance and a USD 80 million allocation to the National Cybersecurity Consortium (NCC). These frameworks encourage businesses to adopt advanced solutions like cloud-based email security to meet compliance and protect sensitive data. Implementing these solutions helps organizations avoid cyber threats while adhering to security standards. As compliance grows more complex, businesses are likely to prefer cloud-based email security for its flexibility, ease of deployment, and data protection capabilities without extensive on-premise infrastructure.
- Key sectors in Canada, including energy, finance, healthcare, and telecommunications, are prioritizing robust cybersecurity measures to protect critical infrastructure. In 2023, the healthcare sector launched the eCE shield to enhance resilience against cyber threats. Handling vast amounts of sensitive patient data, this sector is particularly vulnerable to phishing and ransomware attacks. Cloud-based email security solutions help healthcare organizations comply with privacy regulations like PHIPA (Personal Health Information Protection Act) and safeguard patient information. This increased focus on cybersecurity is expected to drive the adoption of cloud-based email security solutions across Canada.

Cloud-based Email Security Industry Overview

The cloud-based E-mail security market comprises several global and regional players in a competitive space. Although the market poses high barriers to entry for new players, several new entrants have gained traction. The intensity of competitive rivalry in the market studied is anticipated to be high over the forecast period.

This market is characterized by moderate/high product differentiation, growing levels of product penetration, and high levels of competition. Generally, the solutions are offered as a package solution, making the consolidated offering look like a part of the product's service.

Many users opt for annual contracts to cut their costs. Lately, companies have also been opting for services that provide faster security updates. This led to increased demand for cloud-based services, as the updates can be received in real-time. The service-based industry prefers such deployment.

Innovation brings about a sustainable, competitive advantage. New markets like Big Data or the IoT are reshaping their security trends. The firm concentration ratio is anticipated to record a higher growth during the forecast period owing to several software firms consider this market a lucrative opportunity to consolidate their offerings. Overall, the degree of competition is high in the market.

Some of the major players in the market are Cisco Systems Inc., Proofpoint Inc., Trend Micro Inc., and Broadcom Inc., among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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