

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

Market Report | 2025-06-01 | 129 pages | Mordor Intelligence

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Report description:

Cloud-based Email Security Market Analysis

The cloud-based email security market size stands at USD 5.55 billion in 2025 and is forecast to expand to USD 9.73 billion by 2030, registering a 12.7% CAGR. A rapid pivot from secure email gateways to API-integrated, cloud-native platforms underpins this growth as enterprises confront AI-powered phishing campaigns that post 24% higher success rates than human-crafted attacks. Quantum-resilient encryption requirements and regionally tighter mandates such as the NIS 2 Directive are pushing organizations to direct 9% of IT budgets to information security. Enterprises also prioritize behavioral analytics to counter generative-AI deepfake emails, while cost-efficient cloud delivery models accelerate adoption among small and mid-sized businesses. Finally, strategic vendor consolidation-exemplified by Proofpoint's USD 1 billion agreement for Hornetsecurity-signals a race to deliver integrated, human-centric protection that fills the 4.8 million global cybersecurity workforce gap.

Global Cloud-based Email Security Market Trends and Insights

Rise in AI-driven phishing and BEC attacks

Generative-AI tooling now allows adversaries to craft tailored emails that mimic executive tone and timing, driving phishing success rates to 60% and pushing 2024 business email compromise losses to USD 2.9 billion. Seventy-five percent of phishing kits marketed on the dark web advertise AI functionality, underscoring an industrialized threat economy. Healthcare recorded a 279% jump in AI-enabled BEC incidents with average losses of USD 125,000 per case. Organizations therefore deploy natural-language

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processing engines that baseline communication patterns and flag linguistic anomalies. Behavioral awareness programs complement technology as employees remain the final checkpoint against well-crafted lures.

Rapid migration from SEG to API-based ICES

Seventy percent of enterprises are actively replacing secure email gateways with Integrated Cloud Email Security platforms that connect directly into Microsoft 365 or Google Workspace via APIs. API integration brings visibility into internal traffic and user behavior without mail-flow rerouting, improving detection efficacy by 30% in customer environments. Real-time telemetry from cloud suites feeds machine-learning models that isolate compromised accounts within minutes. Vendor alliances-such as Proofpoint's integration with Azure security APIs-lower deployment timelines from months to days, hastening the architectural shift.

Persistent skills gap in cloud-security operations

The global workforce counts 5.5 million cybersecurity professionals, yet faces a 4.8 million shortfall, and 90% of companies cite cloud and AI security expertise as the hardest to hire. ENISA confirms that 99% of cloud security failures originate from customer misconfigurations rather than provider flaws. Financial services and technology firms hold vacancy rates around 28%, slowing the rollout of behavioral analytics tools that demand specialized tuning. Many organizations therefore shift to managed security services and AI-assisted tooling to offset human shortages, though automation still requires oversight for policy governance.

Other drivers and restraints analyzed in the detailed report include:

Cost and agility benefits of cloud delivery / Generative-AI deepfake emails / Latency and data-sovereignty compliance hurdles /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Filtering and Anti-Spam retained 41.5% of the cloud-based email security market in 2024. Data Loss Prevention, however, is projected to grow fastest at 13.5% CAGR because remote work accelerates unstructured data exposure in email workflows. Organizations now value context-aware DLP that tracks content, user, and location metadata in real time, replacing legacy regex pattern matching. Malware and Advanced Threat Protection services integrate large language models that scan attachments for behavioral indicators rather than static signatures. Encryption and Tokenization offerings expand as early movers embed post-quantum algorithms, preparing customers for National Institute of Standards and Technology transition timelines. Collectively, these shifts mark a pivot from perimeter defense to data-centric controls.

Expanding regulatory frameworks such as HIPAA and PCI-DSS compel enterprises to log and audit email-borne data flows. Google's delivery of end-to-end encryption for Gmail enterprise users illustrates how vendors package compliance inside default settings. The cloud-based email security market size for DLP-driven offerings is expected to capture a rising share of total spend as organizations tackle insider risk alongside external threat vectors. Vendors also bundle security-awareness training modules that reinforce policy adherence, creating unified platforms that reduce alert fatigue and compliance overhead.

Secure Email Gateways still controlled 55.6% revenue in 2024, yet API-enabled Integrated Cloud Email Security solutions are forecast to rise at 13.9% CAGR, reflecting architectural limitations of gateway proxies in cloud-native suites. ICES connects directly into Microsoft 365 and Google Workspace to analyze internal traffic, delivering 30% uplift in social-engineering detection rates. Cloud-native email security platforms also auto-scale, making them attractive for burst workloads and geographically distributed teams. Hybrid approaches persist where heavily regulated sectors maintain on-prem gateways for compliance logging

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but wrap APIs for behavioral analytics.

As partnerships deepen-Microsoft recently extended Azure-based threat-signal sharing with Proofpoint-customers gain unified telemetry that feeds downstream XDR platforms. Resulting efficiencies shorten mean-time-to-detect incidents by up to 40%. The cloud-based email security market size attached to API-first deployments is projected to overtake SEG allocations before 2029 as refresh cycles retire appliance footprints.

The Cloud-Based Email Security Market Report is Segmented by Service Type (Filtering and Anti-Spam, Malware and Advanced Threat Protection, and More), Platform Integration (Secure Email Gateway (SEG), and More), Organization Size (Large Enterprises and Small and Medium Enterprises (SMEs)), Industry Vertical (BFSI, Government and Defense, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America led the cloud-based email security market with 38.6% revenue in 2024. Widespread Microsoft 365 adoption and high incident disclosure rates drive investment, while tight breach-notification windows compel rapid deployment of automated response tooling. Vendor consolidation in the region accelerates platform breadth, offering bundled email, endpoint, and identity security under single contracts. Government directives such as the US Cybersecurity Strategy promote zero-trust email architectures, underpinning continued demand.

Asia-Pacific is forecast for the highest 13.0% CAGR through 2030 amid rapid digital transformation and the region's 31% share of global cyberattacks. China and Japan together are projected to expand at 16.9% CAGR through 2028 as data-localization requirements fuel demand for sovereign cloud instances that embed email security controls in country-specific data centers. India emerges as a growth hotspot, buoyed by its expanding IT services sector and government-led "Digital India" program that offers tax incentives for cybersecurity investment.

Europe's momentum rests on stringent regulations: GDPR fines for data-exfiltration via email and the new NIS 2 Directive have elevated security spending to 9% of IT budgets on average. Organizations in Germany and France push suppliers for quantum-resilient encryption and ESG-validated data centers. Elsewhere, South America and the Middle East and Africa remain nascent markets, yet cloud vendor region launches combined with rising ransomware incidents foster gradual uptake. As hyperscalers open local availability zones, latency barriers fall, and email security services become compliant with emerging data-residency laws.

List of Companies Covered in this Report:

Barracuda Networks Inc. / Proofpoint Inc. / Mimecast Ltd. / Cisco Systems Inc. / Trend Micro Inc. / Microsoft Corporation / Google LLC (Google Cloud) / Fortinet Inc. / Broadcom Inc. (Symantec) / Check Point Software Technologies Ltd. / Sophos Group PLC / Forcepoint LLC / Dell Technologies Inc. / Zscaler Inc. / Cloudflare Inc. / Ironscales Ltd. / Egress Software Technologies Ltd. / Trellix (Musarubra US LLC) / OpenText Cybersecurity /

Additional Benefits:

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

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Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Barracuda Networks Inc.

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