strategicdefence INTELLIGENCE

The Global Cybersecurity Market 2013–2023

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1 Executive Summary

The global cyber warfare market is expected to grow at a CAGR of XX%

Global spending on cyber warfare systems is expected to remain robust over the forecast period due primarily to the increased importance of such systems in modern warfare. The formation of the US Cyber Command, or US CYBERCOM, by the highest defense spender globally, highlights the importance of cyber warfare in today's world. Furthermore, the cyber attacks in South Korea, the US, Estonia, and Georgia in 2011, add credence to the growing expenditure on global cyber warfare systems. Wars include a mix of physical, mental, and tactical elements, with information and communication technologies (ICT) playing a major role in the capabilities of mobile forces armed with real-time information devices. ICTs can be used to attack these battlefield systems directly, to capture sensitive data from defense contractors and governments or disrupt national infrastructure. Equally, defense systems must be built to detect and counter these attacks, making cyber warfare systems essential tools for maintaining an advantage in modern conflicts. The market for cyber security is expected to increase from US$XX billion in 2013, to US$XX billion by 2023, representing a CAGR of XX%.

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2 Global Cybersecurity Market Size and Drivers

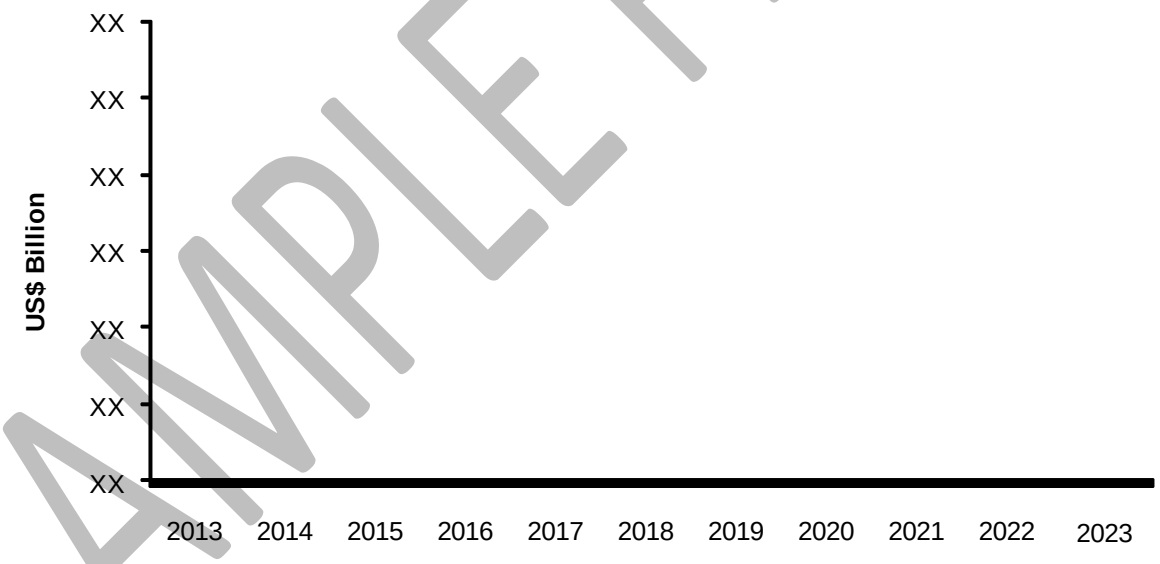
2.1 Cybersecurity Market Size and Forecast 2013–2023

2.1.1 Global cybersecurity market expected to witness a robust growth over the forecast period

The global cyber warfare market is projected to record robust growth in spending over the forecast period owing to the rise in cyber attacks on the military and other critical IT infrastructure. Countries across regions are now focusing on establishing and developing their cyber security infrastructure, an area of defense spending that was neglected until recently. The cyber security market is increasing at a CAGR of XX%, from US$XX billion in 2013 to value US$XX billion in 2023. The market consists of four categories of cybersecurity: network security, data security, identity and access, and cloud security. The network security segment is expected to account for XX% of the global cybersecurity market, followed by data security, identity and access, and cloud security, with shares of XX%, XX%, and XX% respectively. During the forecast period, cumulative global expenditure on cybersecurity is expected to reach US$XX billion.

The chart below shows the expected cybersecurity market value during 2013–2023:

Figure 1: Global Cybersecurity Market (US$ Billion), 2013–2023



Source: SDI analysis

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2.2 Global Cybersecurity Market – Regional Analysis

2.2.1 North America is expected to lead the global cybersecurity market

The global cybersecurity market is dominated by North America, with the US being the largest defense spender in the world; overall, North America is set to spend US$XX billion on cybersecurity during the forecast period. Despite the scheduled budget cuts, Europe represents the second-largest market, with the total cybersecurity market valued at around US$XX billion, offering a potentially attractive investment opportunity for suppliers. The Asia-Pacific region is projected to spend an estimated US$XX billion on cybersecurity during the forecast period, followed by the Middle East and Latin America, with US$XX billion and US$XX billion respectively.

The table below gives a brief overview of the cybersecurity market:

Table 1: Global Cybersecurity Market Overview

Region	Market in 2013	Market in 2023	Total Market (2013–2023)	Annualized growth/decline (2013–2023)
North America	US$XX million	US$XX billion	US$XX billion	XX%
Europe	US$XX million	US$XX billion	US$XX billion	XX%
Asia Pacific	US$XX million	US$XX billion	US$XX billion	XX%
Middle East	US$XX million	US$XX billion	US$XX billion	XX%
Latin America	US$XX million	US$XX million	US$XX billion	XX%
Africa	US$XX million	US$XX million	US$XX billion	XX%
Total Cybersecurity Market	**US$XX billion**	**US$XX billion**	**US$XX billion**	**XX%**

Source: SDI analysis © SDI

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2.3 Cybersecurity Sub–Sector Market Size Composition

2.3.1 Network security to account for the largest share of the market during the forecast period

While the network security market segment is expected to account for XX% of the global cybersecurity market during the forecast period, data security, and identity and access will account for XX% and XX% share respectively. The remaining XX% of market share is expected to be accounted for by the cloud security segment.

The table below gives a brief overview of the global cybersecurity market:

Table 2: Global cybersecurity Market Overview

Particulars	Market in 2013	Market in 2023	Total Market (2013–2023)	Annualized growth/ decline (2013–2023)
Network security	US$XX billion	US$XX billion	US$XX billion	XX%
Data security	US$XX billion	US$XX billion	US$XX billion	XX%
Identity & access	US$XX billion	US$XX billion	US$XX billion	XX%
Cloud security	US$XX billion	US$XX billion	US$XX billion	XX%
Total cybersecurity market	**USXX billion**	**US$XX billion**	**US$XX billion**	**XX%**

Source: SDI analysis © SDI

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