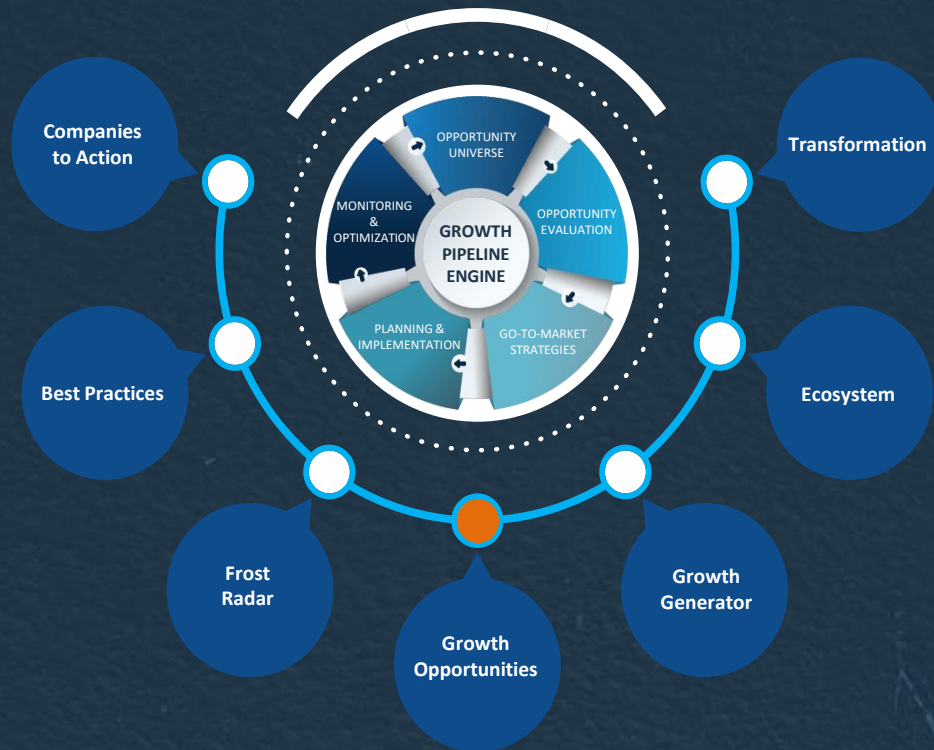


Endpoint Security Industry, Global, 2024–2028



The Endpoint Security Industry
is Driving Transformational
Growth due to an Ever-
complex Threat Landscape

Global Security Research Team at
Frost & Sullivan

KAE4-74

May 2025

Contents

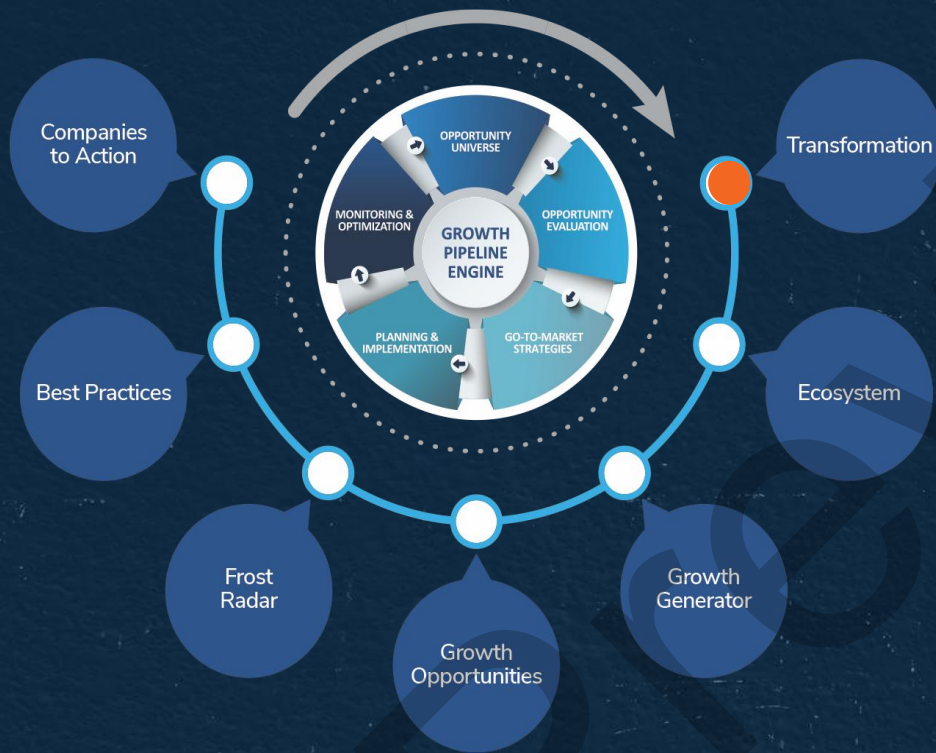
Section	Slide Number
<u>Growth Environment: Transformation in the Endpoint Security Industry</u>	5
• <u>Why Is It Increasingly Difficult to Grow?</u>	6
• <u>The Strategic Imperative 8™</u>	7
• <u>The Impact of the Top 3 Strategic Imperatives on the Endpoint Security Industry</u>	8
<u>Growth Environment: Ecosystem in the Endpoint Security Industry</u>	9
• <u>Scope of Analysis</u>	10
• <u>Segmentation</u>	11
<u>Growth Environment: Companies to Action (C2A)</u>	12
• <u>Competitive Environment</u>	13
• <u>Key Competitors</u>	14
<u>Growth Generator in the Endpoint Security Industry</u>	15
• <u>Growth Metrics</u>	16
• <u>Growth Drivers</u>	17
• <u>Growth Driver Analysis</u>	18
• <u>Growth Restraints</u>	22

Contents (continued)

Section	Slide Number
• Growth Restraint Analysis	23
• Trends	26
• Forecast Considerations	27
• Revenue Forecast	28
• Revenue Forecast by Region	29
• Revenue Forecast by Industry Vertical	30
• Revenue Forecast by Business Size	31
• Revenue Forecast Analysis	32
• Pricing Trends and Forecast Analysis	33
• Revenue Share	34
• Revenue Share Analysis	35
Growth Opportunity Universe in the Endpoint Security Industry	37
• Growth Opportunity 1: Incorporate AI Technology into Endpoint Solutions	38
• Growth Opportunity 2: Implement Mobile Threat Defense (MTD)	40
• Growth Opportunity 3: Prepare a Layered Cybersecurity Strategy	42

Contents (continued)

Section	Slide Number
<u>Insights for CISOs</u>	44
• <u>Insights for CISOs</u>	45
<u>Appendix & Next Steps</u>	46
• <u>Benefits and Impacts of Growth Opportunities</u>	47
• <u>Next Steps</u>	48
• <u>List of Exhibits</u>	49
• <u>Legal Disclaimer</u>	50

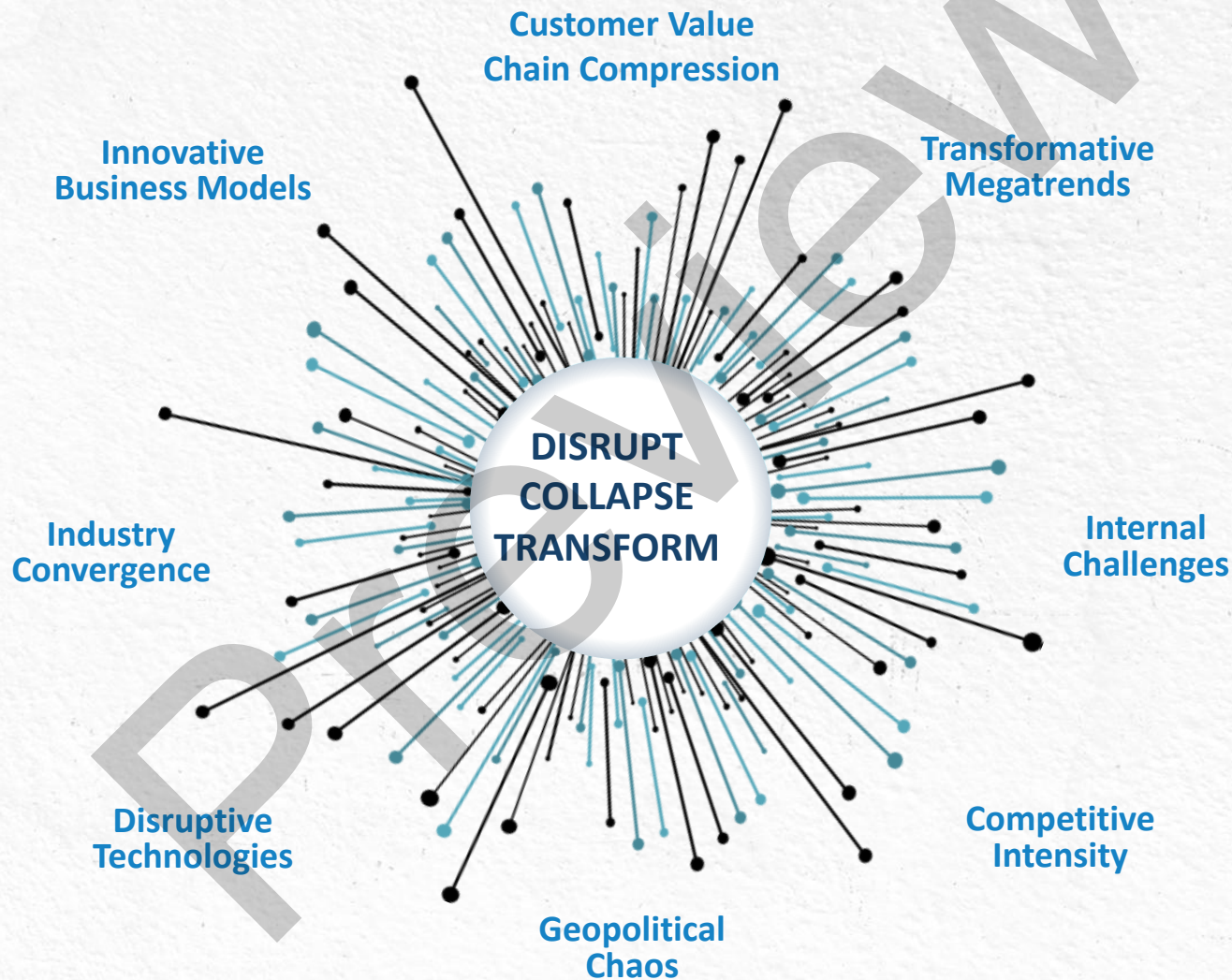


Growth Environment: Transformation in the Endpoint Security Industry

Is your company prepared to Survive
& Thrive through the coming
Transformation?

Why is it Increasingly Difficult to Grow?

The Strategic Imperative 8™: Factors Creating Pressure on Growth



The Strategic Imperative 8™

Innovative Business Models

A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning

Customer Value Chain Compression

Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables reduction in friction and the number of steps in customer journeys

Transformative Megatrends

Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives

Internal Challenges

The internal organizational behaviors that prevent a company from making required changes

Competitive Intensity

A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance

Geopolitical Chaos

Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security

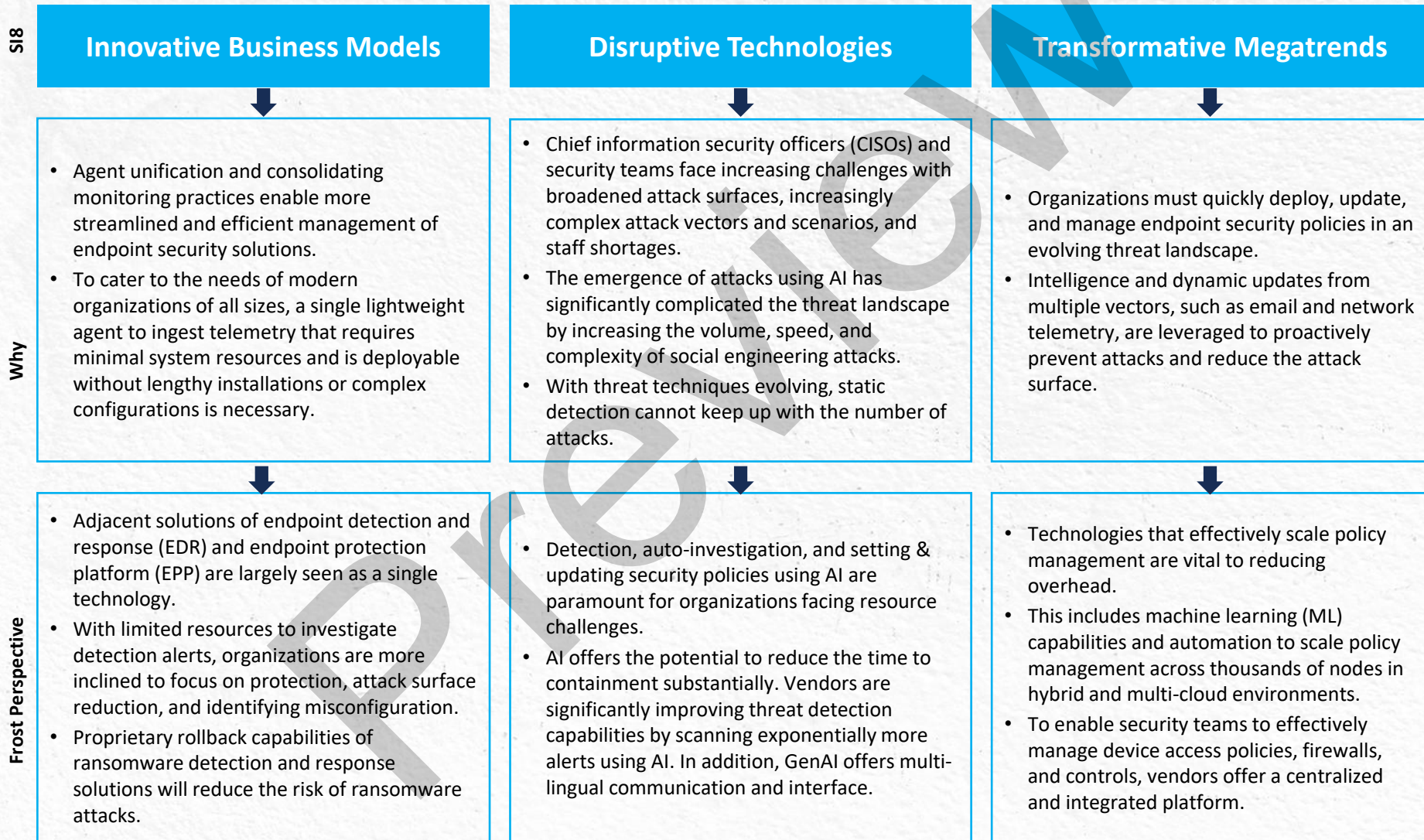
Disruptive Technologies

New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate

Industry Convergence

Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

The Impact of the Top 3 Strategic Imperatives on the Endpoint Security Industry





Growth Environment: Ecosystem in the Endpoint Security Industry

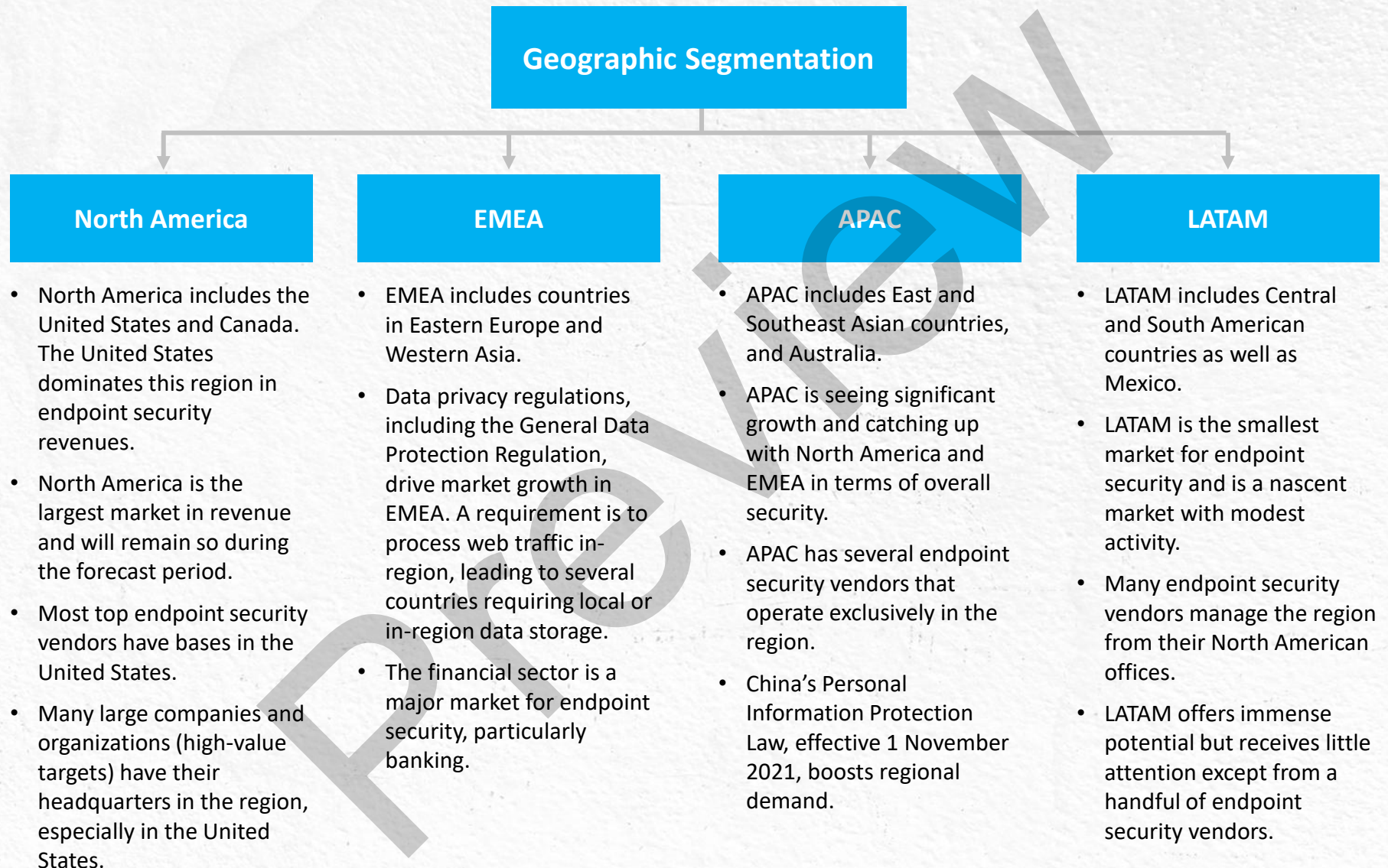
How is the complexity of Ecosystem impacting your future Growth Potential?

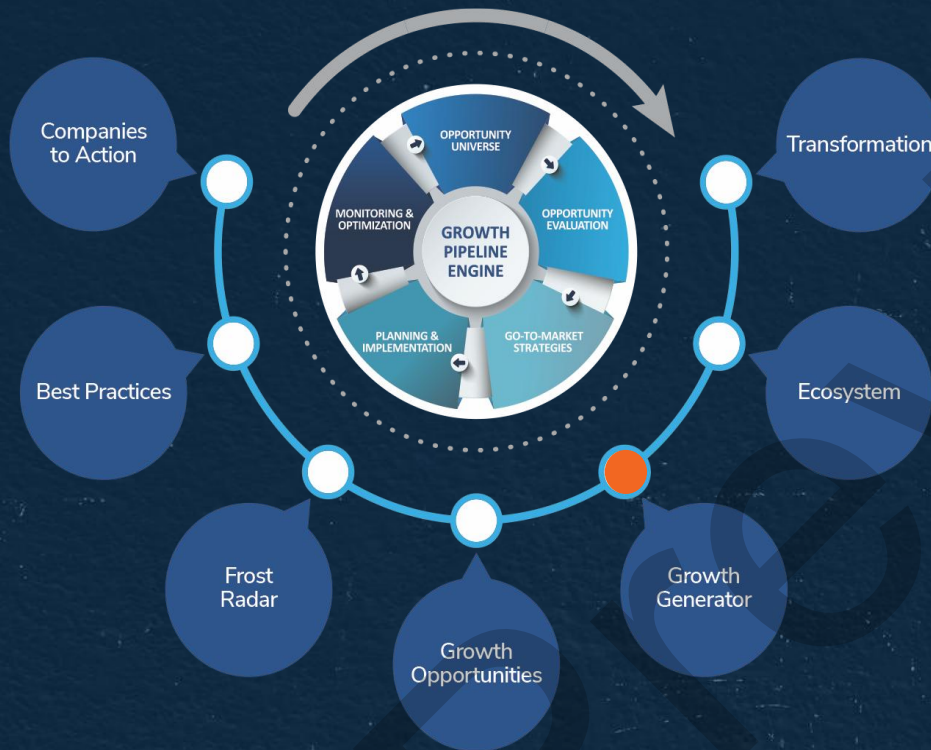
Scope of Analysis

- The average organization manages thousands of endpoints that have access to its corporate network. These endpoints are the most vulnerable and exploited part of any network.
- Endpoint security includes host-based software products that secure computing devices, such as laptops, desktops, tablets, servers, and smartphones, from malware, cyberattacks, and unwanted applications. The Internet of Things (IoT) devices are endpoints that also require securing.
- Endpoint security includes EPP and EDR.
 - EPP is a software suite that includes antivirus, intrusion prevention, anti-malware, and other features.
 - EDR is an advanced tool that detects threats, contains the incident, investigates with forensic and proactive hunting tools, and provides immediate response and remediation.
 - Modern endpoint security combines EPP and EDR functions for superior performance.
- The analysis offers a revenue breakdown by:
 - **Region:** North America; Europe, Middle East, and Africa (EMEA); Asia-Pacific (APAC); and Latin America (LATAM)
 - **Vertical:** Banking and finance; government; retail; healthcare and medical; manufacturing; utilities; media and entertainment; technology and telecommunications; professional, scientific, and tech services; education; and others
 - **Business size:** Micro and small businesses (less than 101 and 101–1,000 employees), mid-sized businesses (1,001–2,500), and large and very large businesses (2,501–5,000 and 5,001–10,000)
- All endpoint vendor revenues and market share in this report are Frost & Sullivan estimates. This study only examines the enterprise endpoint market.

Scope	
Geographic coverage	Global
Study period	2021–2028
Base year	2024
Forecast period	2025–2028
Monetary unit	US Dollars

Segmentation





Growth Generator in the Endpoint Security Industry

What are your organization's Growth Aspirations?

Growth Drivers

Endpoint Security: Growth Drivers, Global, 2025–2028

Driver	1–2 Years	3–4 Years
AI enables attackers to deploy more dangerous attacks. Security vendors can also use the technology to combat the influx of attacks.	High	High
Data loss prevention is a crucial issue in cybersecurity. Protecting data is vital to business success in the digital age.	High	High
Enterprises face more sophisticated and multi-vector attacks amid a shortage of qualified cybersecurity staff and reduced budgets.	High	High
Digital transformation, remote working, IoT devices, and bring-your-own-device (BYOD) practices drive the need for endpoint protection solutions and more extensive use of cloud-hosted consoles.	High	High



Growth Restraints

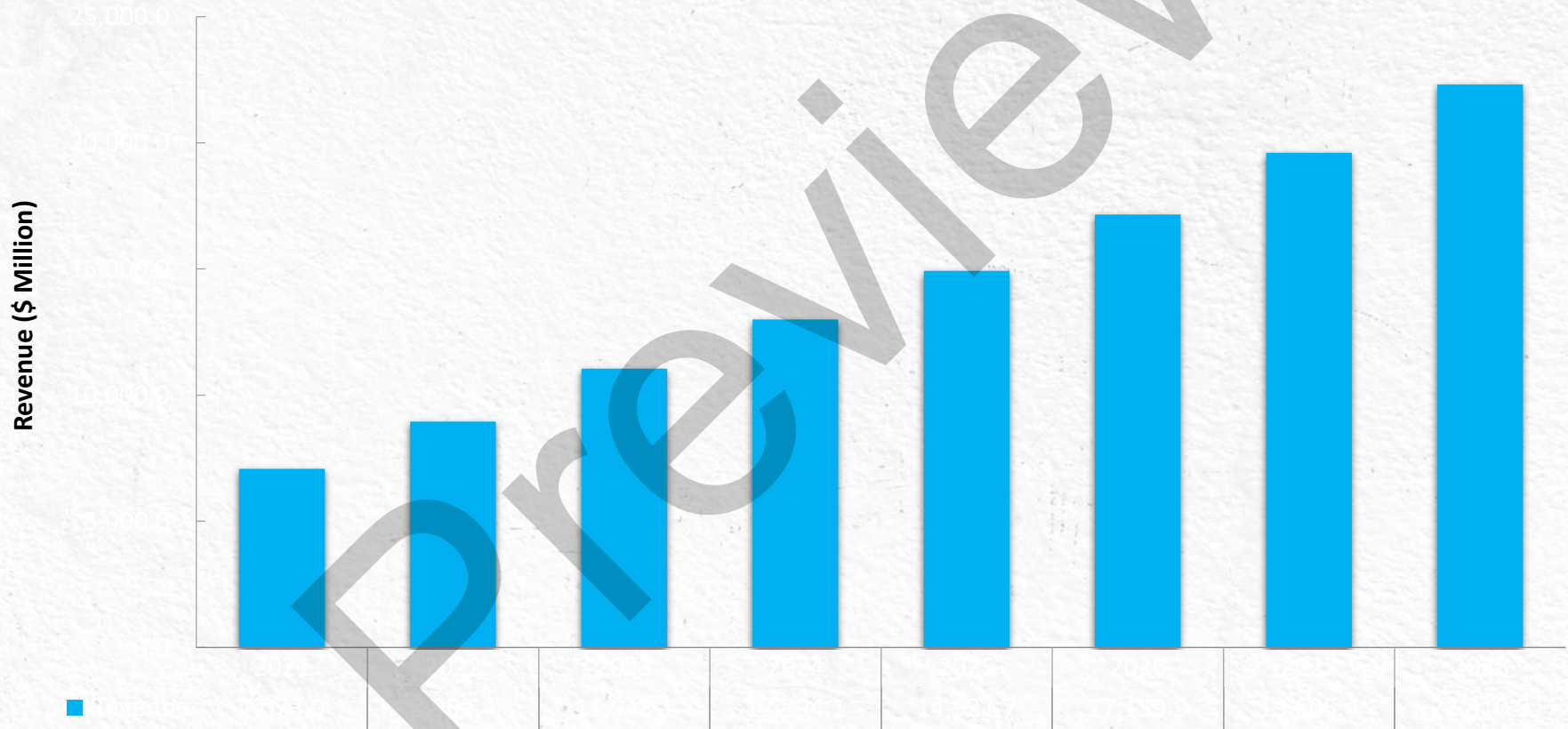
Endpoint Security: Growth Restraints, Global, 2025–2028

Restraint	1–2 Years	3–4 Years
An increase in connected devices creates more organizational vulnerabilities with more access points as the cyberattack landscape constantly grows and changes.	High	High
Endpoint security is a highly competitive market with many solutions. This can overwhelm and confuse organizations as to which best suits their needs.	High	Medium
Operational security complexity is a challenge in the cybersecurity industry. Organizations pursuing a multilayered security architecture may inadvertently create silos and security gaps.	Medium	High

Revenue Forecast

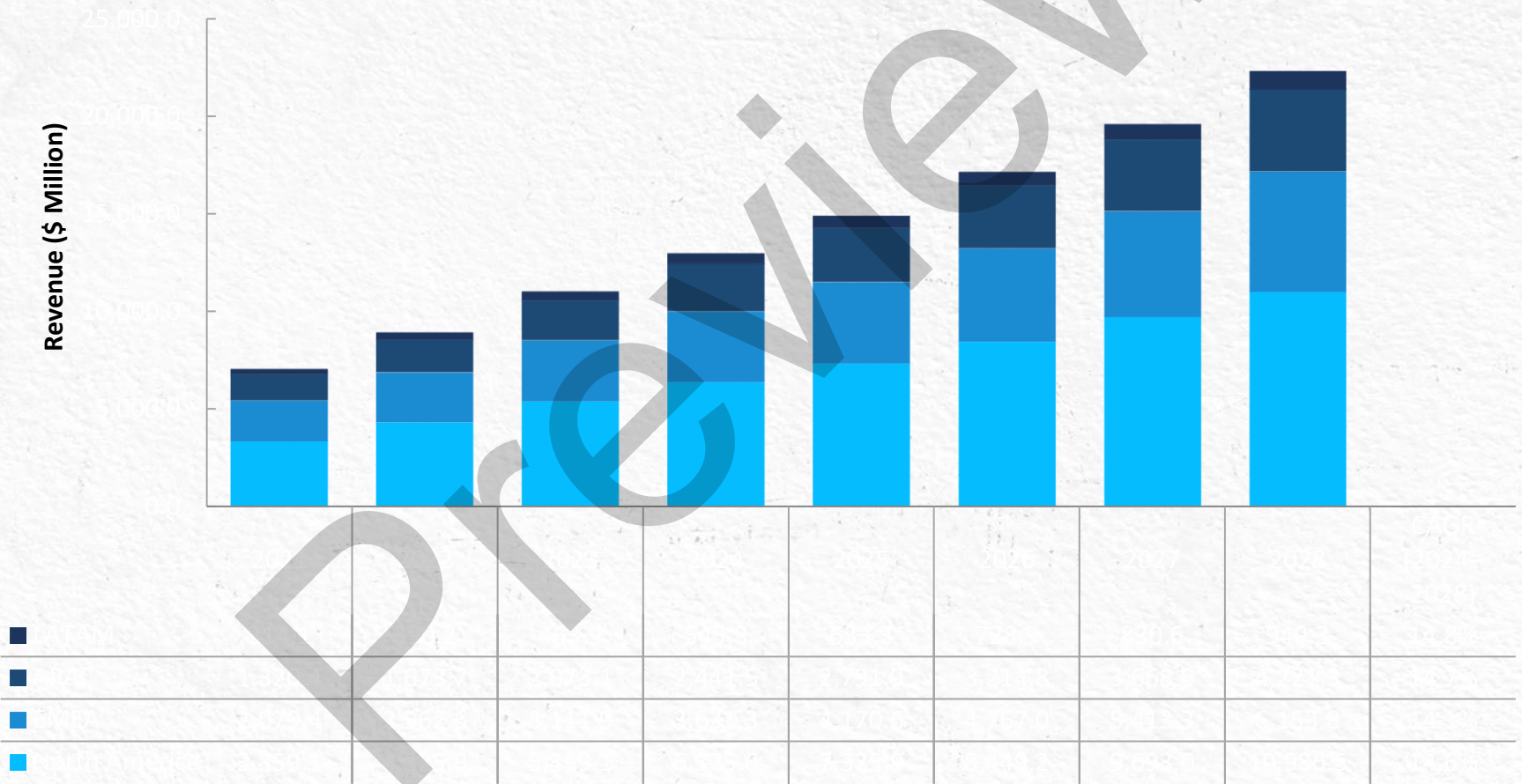
Endpoint Security: Revenue Forecast, Global, 2021–2028

CAGR, 2024–2028 = 14.5%



Revenue Forecast by Region

Endpoint Security: Revenue Forecast by Region, Global, 2021–2028



FROST & SULLIVAN



Growth Opportunity Universe in the Endpoint Security Industry

What Growth Strategies have you embraced to maximize your Growth Potential?

Growth Opportunity 1: Incorporate AI Technology into Endpoint Solutions

Opp. Size in 5 Years	USD 100 M - USD 500 M	Relevant End-User Industries for this Growth Opportunity			Applicable Regions		
		Manufacturing	Mobility	Metal & Mining	Central & East Europe	South Asia	Western Europe
Timeline for Action	1 to 3 Years	Energy & Environment	Chemicals & Materials	Information & Communications Technologies	CIS	North America	Latin America
		Electronics & Semiconductors	Agriculture, Food & Nutrition	Govt and Public Sector	North America	Latin America	Africa
		Construction	Education	Healthcare & Lifesciences	Latin America	Africa	Middle East
GO Base Year	2025	Consumer	Aerospace	Hospitality	Middle East	Asia-Pacific	
		Retail	Defense	Banking & Financial Services	Asia-Pacific		

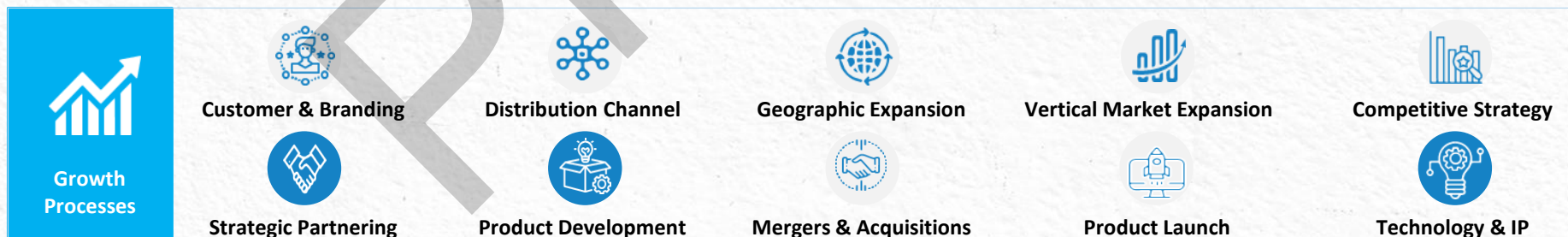
Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Growth Opportunity 2: Implement Mobile Threat Defense (MTD)

Opp. Size in 5 Years USD 100 M - USD 500 M	Relevant End-User Industries for this Growth Opportunity			Applicable Regions
	Manufacturing	Mobility	Metal & Mining	Central & East Europe
Timeline for Action 1 to 3 Years	Energy & Environment	Chemicals & Materials	Information & Communications Technologies	South Asia
	Electronics & Semiconductors	Agriculture, Food & Nutrition	Govt and Public Sector	Western Europe
	Construction	Education	Healthcare & Lifesciences	CIS
	Consumer	Aerospace	Hospitality	North America
	Retail	Defense	Banking & Financial Services	Latin America
	GO Base Year 2025			Africa
			Middle East	
			Asia-Pacific	

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Growth Opportunity 3: Prepare a Layered Cybersecurity Strategy

Opp. Size in 5 Years USD 100 M - USD 500 M	Relevant End-User Industries for this Growth Opportunity			Applicable Regions
	Manufacturing	Mobility	Metal & Mining	Central & East Europe
Timeline for Action 1 to 3 Years	Energy & Environment	Chemicals & Materials	Information & Communications Technologies	South Asia
	Electronics & Semiconductors	Agriculture, Food & Nutrition	Govt and Public Sector	Western Europe
	Construction	Education	Healthcare & Lifesciences	CIS
	Consumer	Aerospace	Hospitality	North America
	Retail	Defense	Banking & Financial Services	Latin America
	Retail	Defense	Banking & Financial Services	Africa
GO Base Year 2025			Middle East	
			Asia-Pacific	

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



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Benefits and Impacts of Growth Opportunities



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