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Gartner Says Security Software Market Grew 12 Per Cent in 2010

Key Issues Facing Security Industry to Be Examined at Gartner Security & Risk Management Summit 2011, 19-20 September in London

Stamford, Conn., 7 June 2011 — Worldwide security software revenue totalled \$16.5 billion in 2010, a 12 per cent increase from 2009 revenue of \$14.7 billion, according to Gartner, Inc. The 2010 results show that overall vendor revenue demonstrated a rebound in growth after a sharp fall in performance in 2009 due to the slow economy and tight IT budgets.

"Products within the security market are undergoing rapid evolution, in terms of both new delivery models — with security as a service showing increasing popularity — and new technologies being introduced, often by start-up companies," said Ruggero Contu, principal research analyst at Gartner. "Key vendors continued to expand their product portfolios, buying companies where appropriate and expanding their reach into emerging markets."

Growth across the security segments showed great levels of variation, with more mature areas, such as endpoint security and Web access management, showing single-digit growth, while security information and event management (SIEM) and secure Web gateway products experienced double-digit growth.

Symantec retained its market share lead and accounted for nearly 19 per cent of total security software revenue in 2010 (see Table 1). Performance of the largest players varied considerably; Symantec, Trend Micro and IBM recorded below-average growth, while other larger players, such as EMC, experienced above-average growth.

Table 1

Security Software Market Share, Worldwide, 2009-2010 (Millions of Dollars)

Company	2010 Revenue	2010 Market Share (%)	2009 Revenue	2009-2010 Growth (%)
Symantec	3,121.6	18.9	2,949.5	5.8
McAfee	1,711.8	10.4	1,595.6	7.3
Trend Micro	1,036.9	6.3	981.4	5.7
IBM	814.7	4.9	759.6	7.3
EMC	626.6	3.8	498.8	25.6
Others	9,188.8	55.7	7,928.6	15.9
Total	16,500.4	100.0	14,713.5	12.0

Source: Gartner (May 2011)

Mr Contu said the security market can be divided into four groups of vendors from a competitive perspective. At the top are the large vendors Symantec and McAfee, with a strong presence in both the consumer and enterprise markets, as well as 30 per cent combined market share. On the second tier is a group of vendors that offer a breadth of product capabilities covering many of the security segments — some with an almost complete focus on security, such as Trend Micro, and others, such as IBM, EMC, Cisco and CA Technologies, for which security is only a part of overall corporate interests. A third tier is composed of specialised midsize vendors, such as Kaspersky, Websense, Sophos, Blue Coat Systems

and ESET, which tend to have more of a focus on certain segments in which they have built a relatively strong presence. The fourth tier is composed of large IT vendors with a small presence in the security space or small players with specialisation in one or two security segments.

Additional information is available in the Gartner report "Market Share Analysis: Security Software, Worldwide, 2010." The report is available on Gartner's website at <http://www.gartner.com/resId=1691414>.

Gartner Security & Risk Management Summit

Gartner analysts will provide additional insight into the security and risk management markets at the Gartner Security & Risk Management Summit 2011. The Summit provides attendees with the information they need to create a layered approach combining risk management and compliance, secure business enablement and infrastructure protection.

The Summit will take place on 19-20 September at the Lancaster London in London. Additional information is available at www.europe.gartner.com/security. Members of the media can register for the Summit by contacting Holly Stevens at holly.stevens@gartner.com.

Additional information from the event will be shared on Twitter at http://twitter.com/Gartner_inc, using #GartnerSecurity.

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