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**Gartner Says Less Than Half of Security Software Market Belongs to Top Five Vendors**  
***Analysts Explore Security Market at Gartner Security & Risk Management Summit 2011, 19-20 September, London***

Egham, UK, 27 July 2011 — Just 44 per cent of the \$16.5 billion world wide security software market in 2010 belonged to Symantec, McAfee, Trend Micro, IBM and CA, according to Gartner, Inc. The combined market share for the top five vendors has dropped from 60 per cent since 2006 (see Table 1).

“The information security market is in a continuous state of consolidation, but even fairly intense merger and acquisition (M&A) activity has not stopped the market from being very fragmented,” said Ruggero Contu, principal research analyst at Gartner. “Market expansion and innovation are driven partly as a result of new start-up players entering the market. New players bring innovative technology solutions to cater for end-user requirements that in turn are created as a result of the new threats, often introduced by cybercriminals taking advantage of new vulnerabilities created by changes to IT ecosystems.”

Gartner said that while M&A activity been a constant factor, the market is far from reaching a consolidated status, i.e. in which more than 60-70 per cent of the market is owned by the top five vendors. Currently, any consolidation at the top is contrasted by an expansion of the market at the bottom.

**Table 1**  
**Market Share Trend, Top Five Vendors, 2006 Versus 2010**

Vendor	2006 Security Software Market Share (%)	Vendor	2010 Security Software Market Share (%)
Symantec	29.5	Symantec	18.9
McAfee	12.3	McAfee	10.4
Trend Micro	8.1	Trend Micro	6.3
IBM	5.3	IBM	4.9
CA	5.0	CA	3.8
<b>Total</b>	<b>60.0</b>	<b>Total</b>	<b>44.3</b>

Source: Gartner (July 2011)

Gartner analysts said the main reason for this trend is that established leaders are losing market share to smaller players, many of which were start-ups that developed new offerings to meet newly introduced threats and vulnerabilities, or they implemented a successful go-to-market strategy, built themselves a niche presence and gradually took market share away from incumbent vendors. Similar to other related markets, such as the IT operations management market, security relies a great deal on innovation from start-up companies, which is particularly the case with a continuous influx of new vulnerabilities and threats.

“We expect more consolidation to take place, along with innovations being introduced by new additions to the market,” said Mr Contu. “The security market continues to provide good growth opportunities for both established players and start-up companies, and the market landscape remains fairly dynamic with many competitors. While end-user organisations have shown an increasing preference to use a suite of products from fewer suppliers, the complexity of end users' product portfolios will not be solved in the short term because new, stand-alone niche tools will continue to be purchased to solve new rising threats and vulnerabilities that incumbent players haven't been able to address.”

Gartner analysts will discuss the worldwide security market at the Gartner Security & Risk Management Summit.

### **About Gartner Security & Risk Management 2011**

The Gartner Security & Risk Management Summit 2011 provides chief information security officers (CISOs) and security, risk management and business continuity professionals with advice on infrastructure protection, governance, risk management, compliance, business continuity, disaster preparedness, response and recovery. The event features analyst-moderated user roundtables, workshops and end-user case studies, plus new research, trend updates, best practices and long-range scenarios.

For further information on the Gartner Security & Risk Management Summit 2011 taking place on 19-20 September in London, please visit [www.europe.gartner.com/security](http://www.europe.gartner.com/security). You can also follow the event on Twitter at [http://twitter.com/Gartner\\_inc](http://twitter.com/Gartner_inc) using #GartnerSecurity.

Additional information is available in the Gartner report "Forecast: Security Software Markets, Worldwide, 2010-2015, 2Q11 Update". The report is available on Gartner's website at <http://www.gartner.com/resId=1733435>. Analysis is available in the Gartner report "Market Trends: An Ever-Consolidating Security Market Never Consolidated". The report is available on Gartner's website at <http://www.gartner.com/resId=1746315>.

### **About Gartner**

Gartner, Inc. (NYSE: IT) is the world's leading information technology research and advisory company. Gartner delivers the technology-related insight necessary for its clients to make the right decisions, every day. From CIOs and senior IT leaders in corporations and government agencies, to business leaders in high-tech and telecom enterprises and professional services firms, to technology investors, Gartner is a valuable partner to 60,000 clients in 11,500 distinct organizations. Through the resources of Gartner Research, Gartner Executive Programs, Gartner Consulting and Gartner Events, Gartner works with every client to research, analyze and interpret the business of IT within the context of their individual role. Founded in 1979, Gartner is headquartered in Stamford, Connecticut, U.S.A., and has 4,500 associates, including 1,250 research analysts and consultants, and clients in 85 countries. For more information, visit [www.gartner.com](http://www.gartner.com).

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