

2025

state of cyber

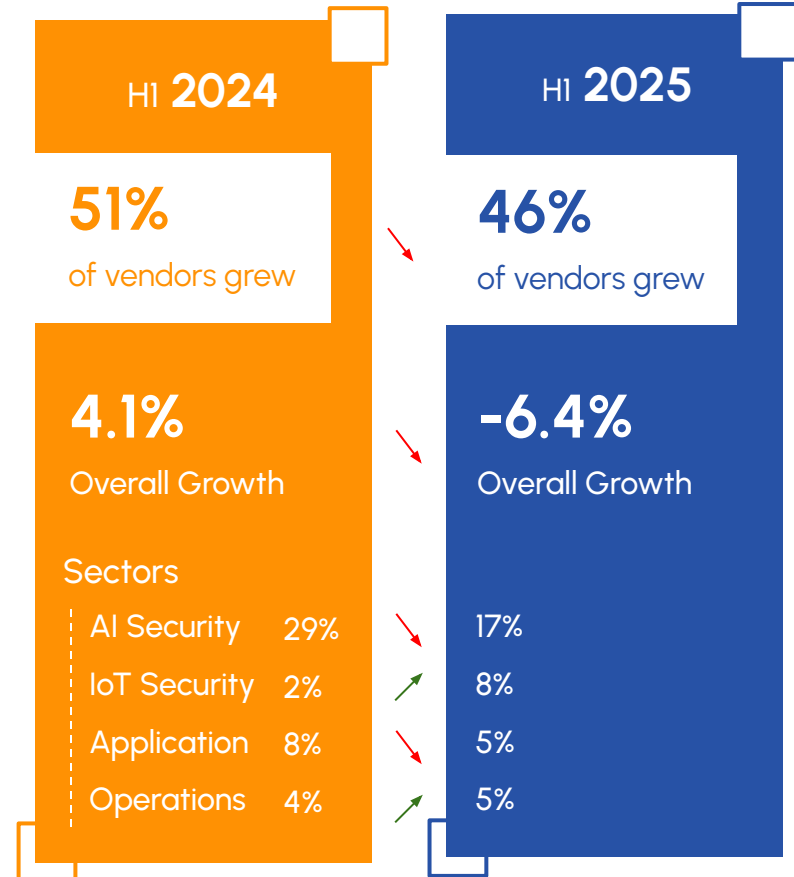
with
IT-Harvest

agenda

Market
Technology
Financing
M&A

The Global Market in focus

- AI Security a leader in growth.
- Less momentum compared to H1 2024. But M&A and funding are up.
- Actual IPOs on the horizon!



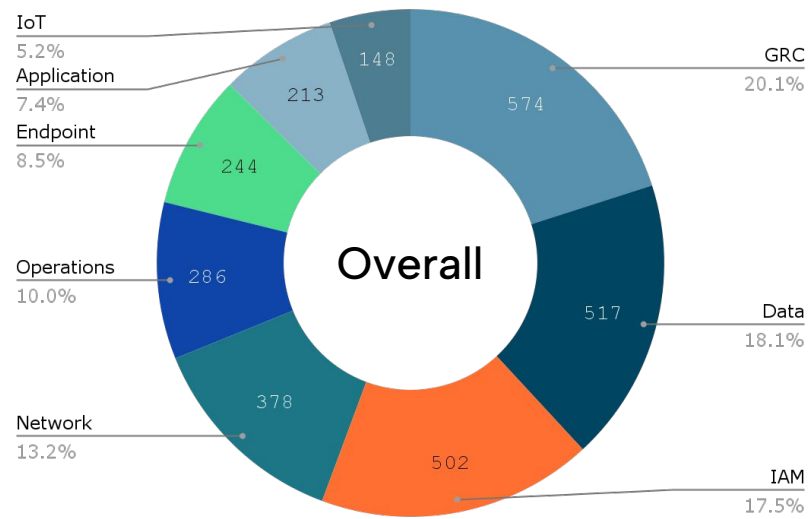
The Cyber 150

Top IT-Harvest Cyber 150 Vendors

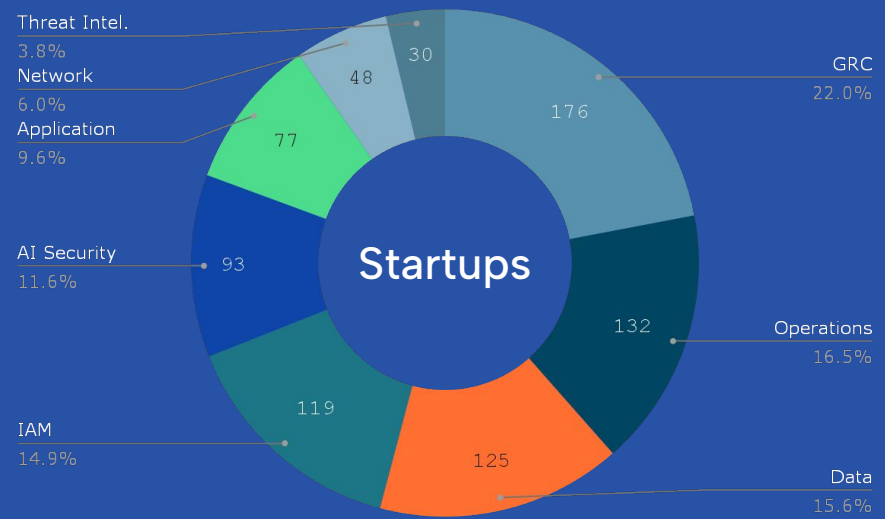


The Global Market

sectors



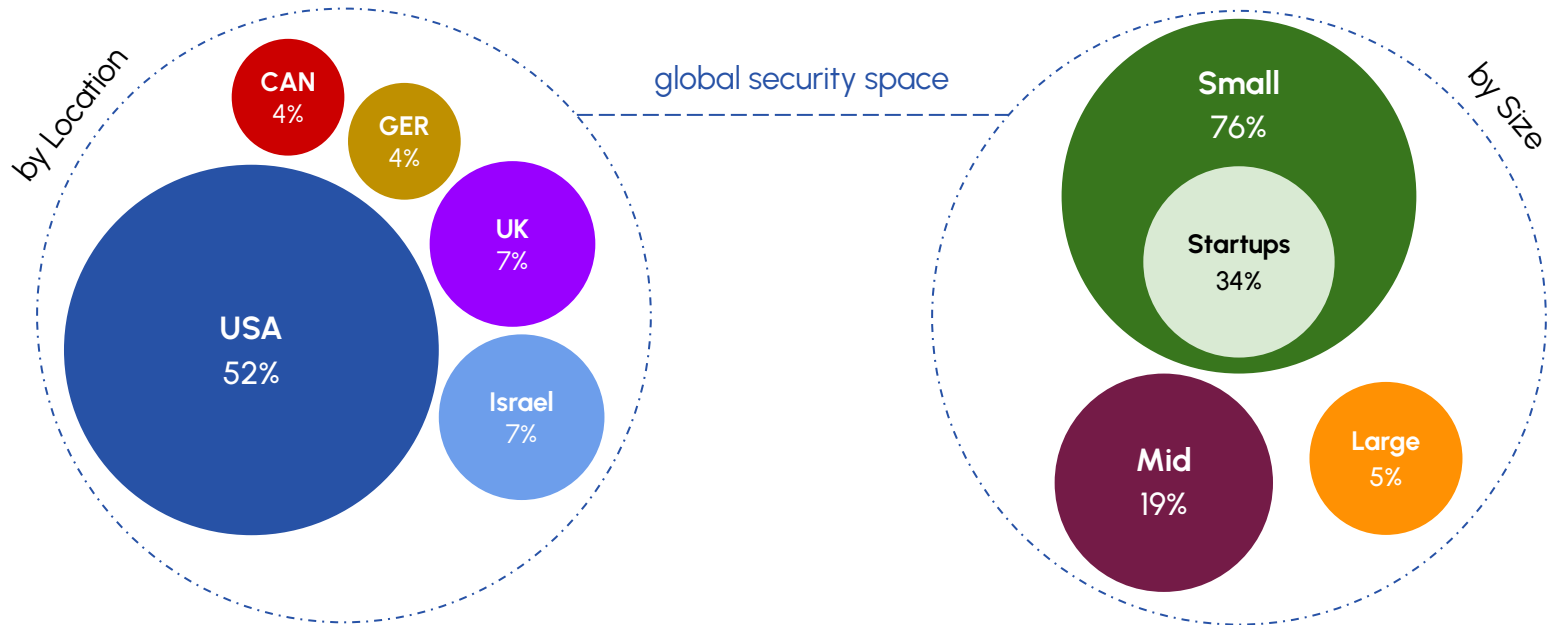
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Services/MSSPs not included in this section..

The Global Market

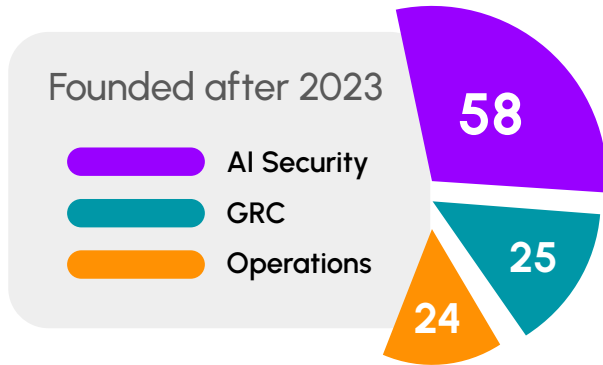
geography and market share



924 Startups Worldwide

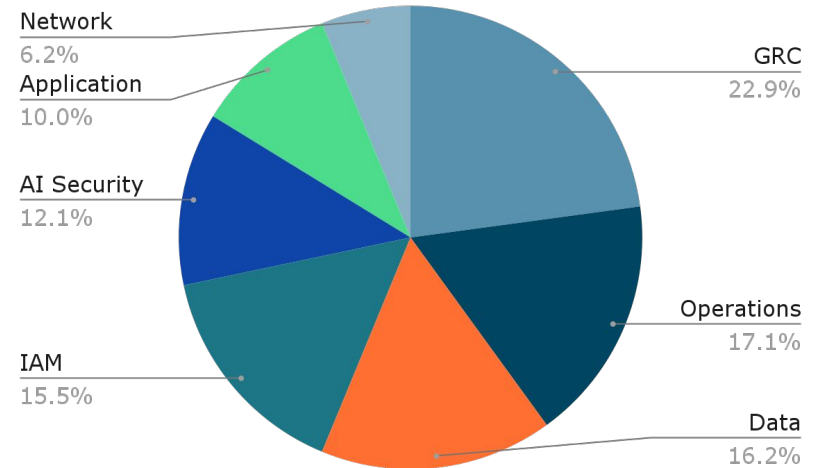
49% Grew in 2025

30% Shrunk by $\geq 5\%$ in 2025



Since 2023 **~1 in 3** startups are AI Security

Startup Sector Concentration

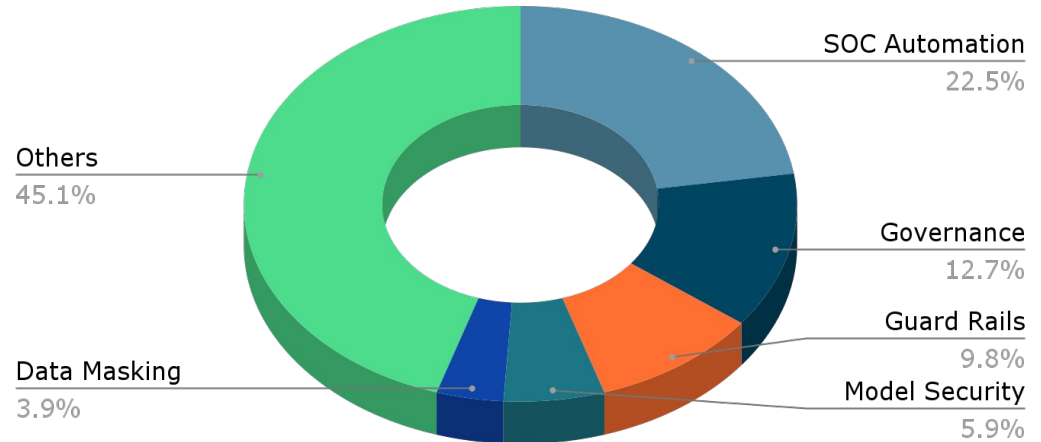


Quick Look

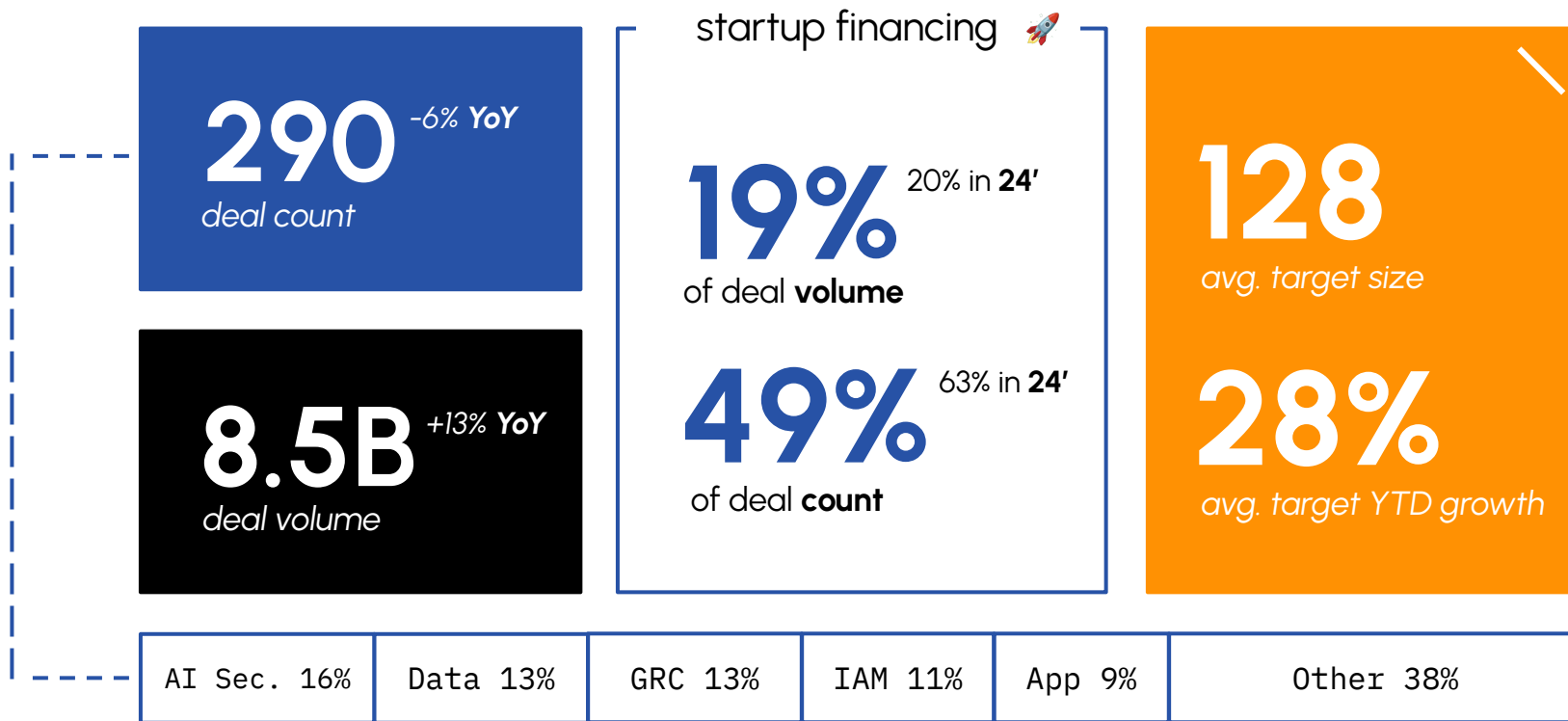
✚ **52%** of global security solutions mention AI.*

✚ **91%** of solutions from vendors founded after 2022 mention AI.*

AI Security Breakdown



*IT-Harvest (11,340 security solutions analyzed)



160 ^{+5.3% YoY}
deal count

64%
venture backed

13 years
avg. target age

92%
strategic deal makeup

359
avg. target size

Sector Insights

■ Data ■ GRC ■ Operations ■ Network ■ IAM ■ MSSP ■ Endpoint ■ Threat Intel.



25%

50%

75%

20+ years
IT-Harvest

Strategic
Advisory

founders

we help you exit



investors

we are your research partners

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