Japan Information Security Market 2022 Research Report

FY2021 Sales Estimated Actual Value
FY2022 Sales Estimated Value
FY2023 Sales Predicted Value

June 26, 2023

JNSA Survey and Research Subcommittee
Security Market Research WG

JNSA Market Research Overview

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JNSA Independent Survey Activities

- Ongoing since 2004
- Commissioned by METI until 2009
- In 2010, due to the addition of a global survey to the METI request, JNSA declined to participate in the commissioned project
- JNSA started its own survey from FY2010
- In FY2019, JNSA began to consider a survey and analysis based on the new classification while proceeding the existing method
  (Beginning in April 2020, activities shifted to teleworking environment due to the spread of COVID-19 infection)
- After FY2020, activities are ongoing through research and analysis based on the new classification

> **Security market research by JNSA members, for JNSA members**
> - **Continuously** capture the security market and the security industry
> - **Utilize** the survey results for the benefit of JNSA member companies in their respective businesses
> - **Interact** with each other through activities, **learn** survey methods, and expand **knowledge**

Market Survey Segmentation

Sub-category	Sub-subcategory
Information Security Tools	
Endpoint protection and management products	Anti-virus, EDR, policy management/configuration management/operation monitoring and control products
Network protection and detection/perimeter protection products	FW, VPN connection, IDS/IPS, WAF, UTM, security information management system, physical security
Content security products	DLP (data leak prevention), encryption, e-mail security, URL filtering, vulnerability inspection
Identity and access management products	Devices for personal authentication and their authentication systems, biometric devices for personal authentication and their authentication systems, identity (ID) management, logon management/access permission, PKI systems and their components

Sub-category	Sub-subcategory
Information Security Services	
Consulting/diagnostic services	Consulting, auditing and evaluation, diagnostics, standards certification
Managed and operation services	SOC, incident response and forensics, intelligence information
Peripheral services	Digital certificate issuance and PK based authentication, literacy education, qualification support, insurance

Business Classification			
A	Overseas vendors or its Japanese subsidiaries	E	Major system integrators where SI is the primary value-add
B	Japanese security tool vendors	F	Consulting companies
C	Distribution companies such as distributors, trading companies	G	Security service providers
D	Secondary and tertiary distributors with SI and NI functions	H	Others (cyber insurance, other different industries)

Population of survey and analysis

![JNSA]

	Survey target (total population)	Analysis target (valid target)
FY2017 (Announced June 2017)	739 companies	591 companies
FY2018 (Announced June 2018)	873 companies	691companies
FY2019 (Announced June 2019)	945 companies	674 companies
FY2020 (Announced June 2020)	947 companies	696 companies
FY2021 (Announced June 2021)	1,018 companies	713 companies
FY2022 (Announced June 2022)	1,001 companies	**686 companies**

Simple total sales of the 686 companies covered	70,534.3 billion yen (Security business ratio 2.4%)

Simple sum of the security businesses of the subject companies

		(Last year)	[Growth rate]
Simple total of security business sales of each of the subject companies	1,692.3 billion yen	(1,610.1 billion yen)	[5.7%]

The size of the Japanese security market estimated by the WG

Estimated actual results for this time	1,332.1 billion yen (1,265.7 billion yen) [5.2%]

Estimated size of Japan's information security market

Tools   (Product revenue such as hardware, software)

FY2022 Market research Unit: 1 million yen	FY2020 Estimated Actual Sales			FY2021 Estimated Actual Sales			FY2022 Estimated Actual Sales			FY2023 Estimated Actual Sales		
	Amount	Composition ratio	Growth rate	Amount	Composition ratio	Growth rate	Amount	Composition ratio	Growth rate	Amount	Composition ratio	Growth rate
Anti-virus	133,732	62.9%	21.9%	130,526	60.5%	-2.4%	127,916	58.1%	-2.0%	125,357	56.1%	-2.0%
EDR	20,189	9.5%	94.9%	27,326	12.7%	35.4%	35,523	16.1%	30.0%	42,628	19.1%	20.0%
policy management/configuration management/operation monitoring and control products	58,526	27.5%	20.9%	57,846	26.8%	-1.2%	56,689	25.8%	-2.0%	55,555	24.9%	-2.0%
Endpoint protection and management products	212,446	29.0%	26.1%	215,698	28.1%	1.5%	220,128	27.4%	2.1%	223,540	26.4%	1.6%
FW	29,125	12.7%	-2.6%	37,308	15.0%	28.1%	44,770	16.4%	20.0%	55,962	18.1%	25.0%
VPN connection	25,469	11.1%	15.4%	23,702	9.6%	-6.9%	23,228	8.5%	-2.0%	22,763	7.4%	-2.0%
IDS／IPS	33,949	14.8%	38.6%	34,452	13.9%	1.5%	35,485	13.0%	3.0%	36,195	11.7%	2.0%
WAF	31,598	13.8%	5.4%	33,410	13.5%	5.7%	35,081	12.8%	5.0%	36,835	11.9%	5.0%
UTM	36,492	15.9%	11.8%	40,109	16.2%	9.9%	44,120	16.2%	10.0%	50,738	16.4%	15.0%
security information management system	51,620	22.5%	113.8%	61,069	24.6%	18.3%	73,283	26.8%	20.0%	91,604	29.6%	25.0%
physical security	21,466	9.3%	8.2%	18,020	7.3%	-16.1%	17,119	6.3%	-5.0%	15,407	5.0%	-10.0%
Network protection and detection/perimeter protection products	229,718	31.3%	25.5%	248,071	32.3%	8.0%	273,086	34.0%	10.1%	309,505	36.6%	13.3%
DLP (data leak prevention)	35,362	19.5%	2.5%	40,610	20.9%	14.8%	42,640	21.4%	5.0%	43,706	21.6%	2.5%
encryption	37,249	20.5%	-9.9%	38,313	19.7%	2.9%	39,271	19.7%	2.5%	40,056	19.8%	2.0%
e-mail security	50,655	27.9%	-3.6%	56,003	28.8%	10.6%	56,003	28.2%	0.0%	56,003	27.7%	0.0%
URL filtering	36,566	20.2%	23.8%	36,404	18.7%	-0.4%	36,768	18.5%	1.0%	37,136	18.4%	1.0%
vulnerability inspection	21,576	11.9%	7.9%	23,036	11.9%	6.8%	24,188	12.2%	5.0%	25,397	12.6%	5.0%
Content security products	181,407	24.7%	2.0%	194,366	25.3%	7.1%	198,870	24.8%	2.3%	202,299	23.9%	1.7%
Devices for personal authentication and their authentication systems	24,847	22.6%	-21.3%	19,084	17.3%	-23.2%	18,130	16.4%	-5.0%	17,223	15.5%	-5.0%
biometric devices for personal authentication and their authentication systems	19,853	18.1%	-38.6%	18,298	16.6%	-7.8%	17,932	16.2%	-2.0%	17,394	15.6%	-3.0%
identity (ID) management	24,330	22.1%	-12.0%	29,313	26.5%	20.5%	30,192	27.3%	3.0%	31,702	28.5%	5.0%
logon management/access permission	28,355	25.8%	9.0%	30,314	27.4%	6.9%	30,617	27.7%	1.0%	31,229	28.0%	2.0%
PKI systems and their components	12,553	11.4%	3.1%	13,433	12.2%	7.0%	13,567	12.3%	1.0%	13,839	12.4%	2.0%
Identity and access management products	109,938	15.0%	-15.3%	110,441	14.4%	0.5%	110,438	13.8%	0.0%	111,387	13.2%	0.9%
Information Security Tools	733,509	100.0%	11.3%	768,576	100.0%	4.8%	802,522	100.0%	4.4%	846,731	100.0%	5.5%
Composition ratio（Tools）		58.0%			57.7%			57.1%			56.5%	

Services (Knowledge/skills/services and know-how intellectual business activities)

FY2022 Market research Unit: 1 million yen	FY2020 Estimated Actual Sales			FY2021 Estimated Actual Sales			FY2022 Estimated Actual Sales			FY2023 Estimated Actual Sales		
	Amount	Composition ratio	Growth rate	Amount	Composition ratio	Growth rate	Amount	Composition ratio	Growth rate	Amount	Composition ratio	Growth rate
Consulting	99,558	43.8%	57.9%	108,525	47.6%	9.0%	113,951	49.3%	5.0%	118,509	50.4%	4.0%
auditing and evaluation	41,910	18.5%	21.6%	38,991	17.1%	-7.0%	37,042	16.0%	-5.0%	35,190	15.0%	-5.0%
diagnostics	49,194	21.7%	21.6%	51,804	22.7%	5.3%	54,395	23.5%	5.0%	57,114	24.3%	5.0%
standards certification	36,380	16.0%	-4.8%	28,645	12.6%	-21.3%	25,781	11.2%	-10.0%	24,492	10.4%	-5.0%
Consulting/diagnostic services	227,042	42.7%	28.9%	227,966	40.5%	0.4%	231,168	38.3%	1.4%	235,305	36.1%	1.8%
SOC	159,100	74.2%	2.0%	176,364	73.0%	10.9%	194,001	70.3%	10.0%	213,401	67.5%	10.0%
incident response and forensics	31,521	14.7%	20.3%	35,161	14.5%	11.5%	45,709	16.6%	30.0%	59,422	18.8%	30.0%
intelligence information	23,895	11.1%	34.4%	30,201	12.5%	26.4%	36,241	13.1%	20.0%	43,490	13.7%	20.0%
Managed and operation services	214,516	40.3%	7.3%	241,726	42.9%	12.7%	275,951	45.7%	14.2%	316,313	48.5%	14.6%
Digital certificate issuance and PK based authentication	28,072	31.0%	6.3%	26,043	27.7%	-7.2%	26,564	27.4%	2.0%	27,095	27.1%	2.0%
literacy education	32,677	36.1%	16.4%	37,453	39.9%	14.6%	38,951	40.2%	4.0%	40,510	40.5%	4.0%
qualification support	14,320	15.8%	-2.8%	15,240	16.2%	6.4%	15,697	16.2%	3.0%	16,325	16.3%	4.0%
insurance	15,569	17.2%	0.7%	15,136	16.1%	-2.8%	15,590	16.1%	3.0%	16,057	16.1%	3.0%
Peripheral services	90,637	17.0%	7.0%	93,872	16.7%	3.6%	96,802	16.0%	3.1%	99,987	15.3%	3.3%
Information Security Services	532,195	100%	15.5%	563,564	100%	5.9%	603,922	100%	7.2%	651,605	100%	7.9%
Composition ratio（Services）		42.0%			42.3%			42.9%			43.5%	

Trends in Information Security Market Size

Estimated actual sales

Unit: 1 million yen

5.2% increment

5.6% increment

6.5% increment

1,332.1 billion yen

1,406.4 billion yen

1,498.3 billion yen

■ Tools ■ Services ■ Total

results for this time

Estimated actual sales
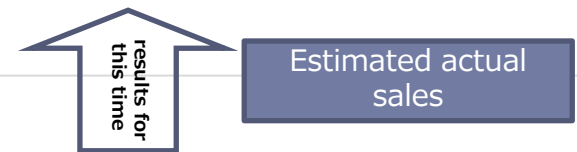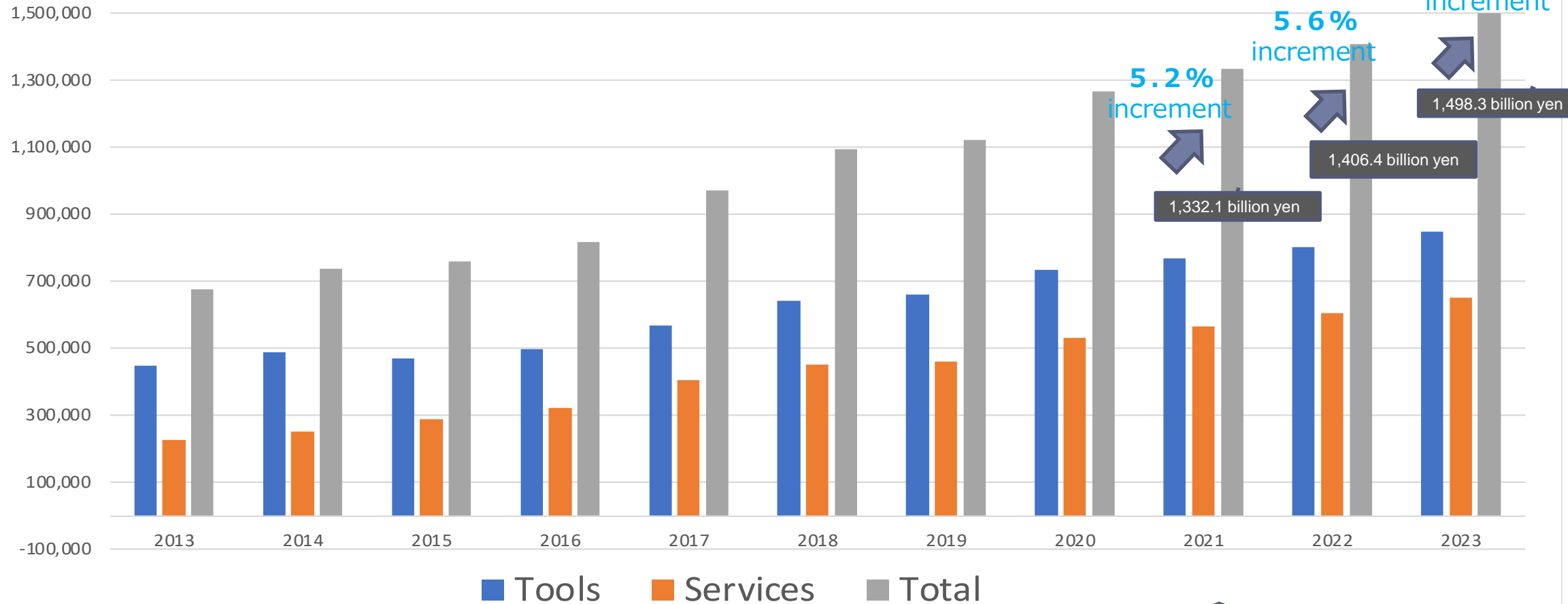
Number and distribution of companies surveyed (Current survey: Year ending March 31, 2023)
Including distribution percentages

Unit: Company

category	Number and distribution of companies surveyed	Endpoint protection and management products	Network protection and detection/perimeter protection products	Content security products	Identity and access management products	Information Security Tools	Consulting/diagnostic services	Managed and operation services	eripheral services	Information Security Services
A	118	68	83	64	37	102	65	61	37	85
B	123	52	71	53	42	103	68	50	42	84
C	54	34	41	33	27	47	30	27	23	38
D	135	81	99	88	65	117	92	64	61	107
E	49	37	40	39	30	43	39	38	33	48
F	32	13	17	12	11	19	23	16	11	25
G	156	61	76	64	50	108	106	90	66	132
H	19	6	3	5	4	7	10	4	9	16
計	686	352	430	358	266	546	433	350	282	535

*Duplicate counts are included in the yellow text as they include dual employment.

	category	Tool specialist	Service specialist	Tool & service specialist	Number of valid target companies	Distribution ratio
A	Overseas vendors or its Japanese subsidiaries	33	16	69	118	16.1%
B	Japanese security tool vendors	39	20	64	123	17.8%
C	Distribution companies such as distributors, trading companies	16	7	31	54	7.5%
D	Secondary and tertiary distributors with SI and NI functions	28	18	89	135	17.2%
E	Major system integrators where SI is the primary value-add	1	6	42	49	5.7%
F	Consulting companies	7	13	12	32	4.8%
G	Security service providers	24	48	84	156	24.9%
H	Others (cyber insurance, other different industries)	3	12	4	19	6.1%
	Total	151	140	395	686	100%

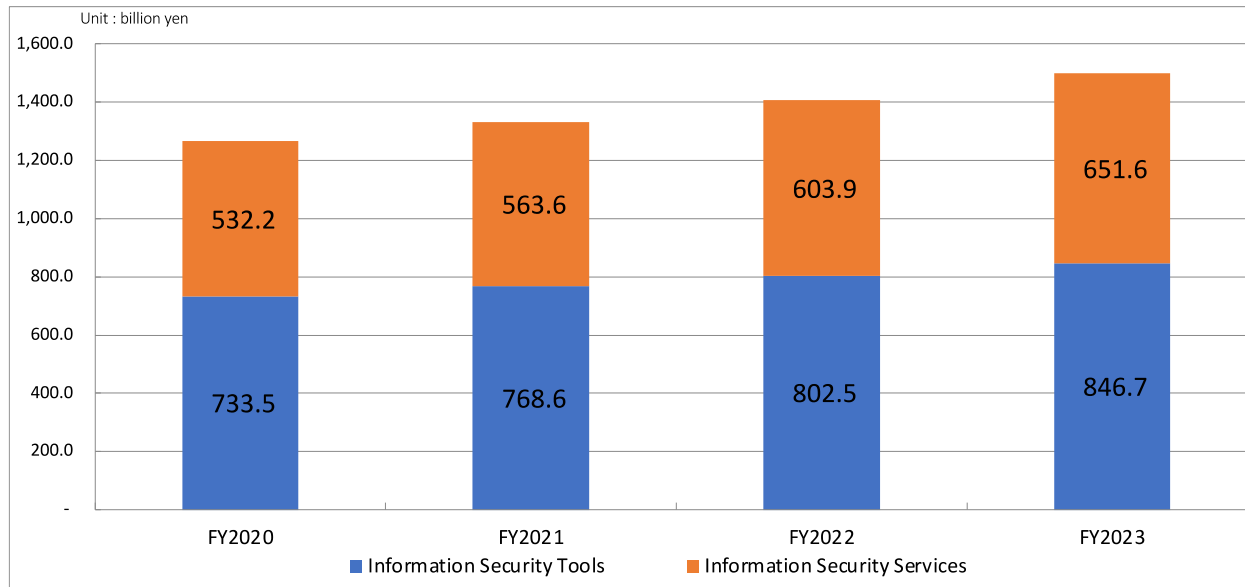# Number of companies surveyed (changes from previous year's survey)

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Unit: Company

category	Number and distribution of companies surveyed	Endpoint protection and management products	Network protection and detection/perimeter protection products	Content security products	Identity and access management products	Information Security Tools	Consulting/diagnostic services	Managed and operation services	eripheral services	Information Security Services
A	▲ 1	11	▲ 3	18	9	▲ 5	18	23	7	22
B	▲ 8	14	0	3	▲ 2	▲ 21	44	29	24	44
C	▲ 3	1	1	▲ 2	3	▲ 6	9	12	12	15
D	▲ 13	4	▲ 8	2	4	▲ 19	14	2	16	12
E	0	1	1	3	0	0	▲ 3	▲ 1	▲ 3	2
F	▲ 3	11	16	10	10	14	▲ 9	7	▲ 2	▲ 9
G	▲ 1	32	36	32	32	49	▲ 6	4	▲ 4	▲ 11
H	2	5	0	1	2	1	8	▲ 2	1	3
計	▲ 27	79	43	67	58	13	75	74	51	78

*Duplicate counts are included in the yellow text as they include dual employment.

category		Tool specialist	Service specialist	Tool & service specialist	Number of valid target companies
A	Overseas vendors or its Japanese subsidiaries	▲ 23	4	18	0
B	Japanese security tool vendors	▲ 52	13	31	▲ 10
C	Distribution companies such as distributors, trading companies	▲ 18	3	12	▲ 4
D	Secondary and tertiary distributors with SI and NI functions	▲ 25	6	6	▲ 14
E	Major system integrators where SI is the primary value-add	▲ 2	0	2	▲ 1
F	Consulting companies	6	▲ 17	8	2
G	Security service providers	10	▲ 50	39	1
H	Others (cyber insurance, other different industries)	▲ 1	1	2	9
Total		▲ 105	▲ 40	118	▲ 17

Market size of tools and services

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Unit : billion yen

Year	Information Security Tools	Information Security Services
FY2020	733.5	532.2
FY2021	768.6	563.6
FY2022	802.5	603.9
FY2023	846.7	651.6

■ Information Security Tools ■ Information Security Services

Tools: 66% → 56.5%
Services: 34% → 43.5%

2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

— Tools — Services

- In recent years, the need for cyber security measures has increased due to the progress of digital transformation, increase of cyber attacks, and the spread of telework.
- As more advanced and continuous security measures, new technologies such as artificial intelligence (AI) and machine learning (ML) have been incorporated into information security, and tools and services that enable early detection, prevention, and recovery from security incidents are emerging one after another.
- Furthermore, with the spread of cloud computing, the cloud security market is also expanding.
- Given the above factors, the information security market is expected to continue growing in the future.
- The gradual upward trend in the size of the information security services market continues. Since the tool market has also been expanding in recent years, and the services associated with tools are also expanding, the proportion of services is expected to increase from FY2022 onward.
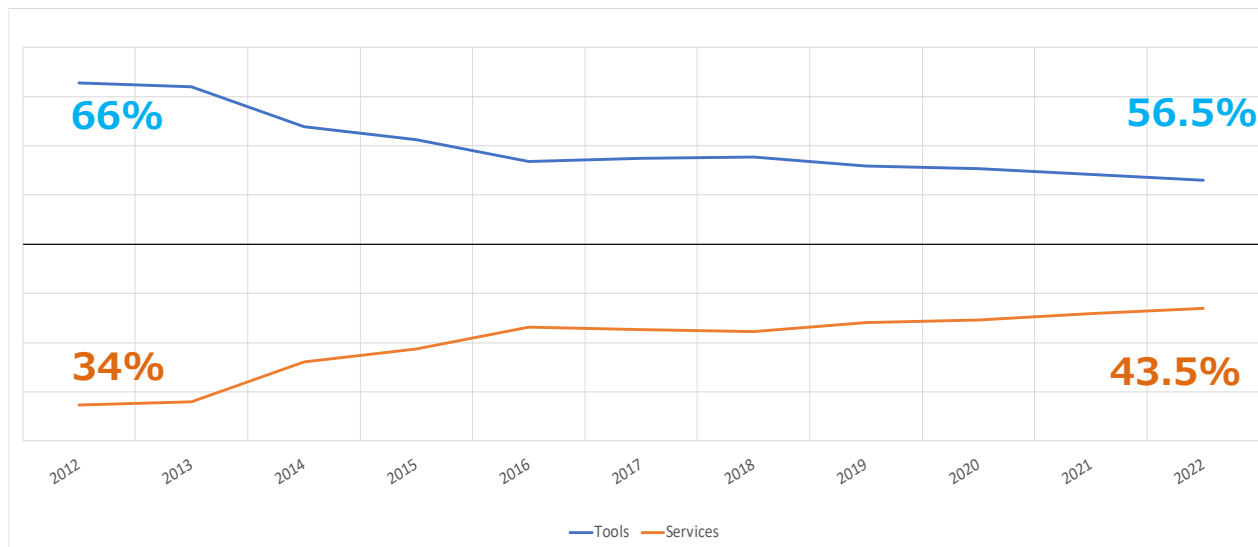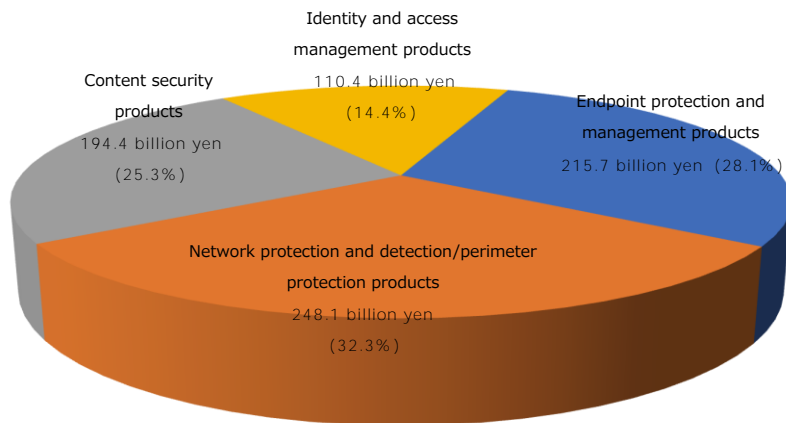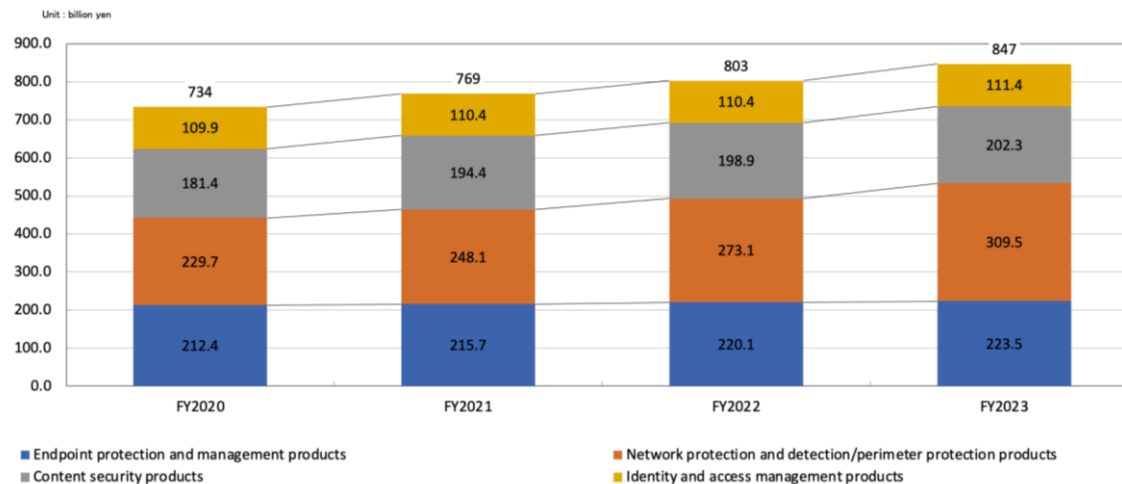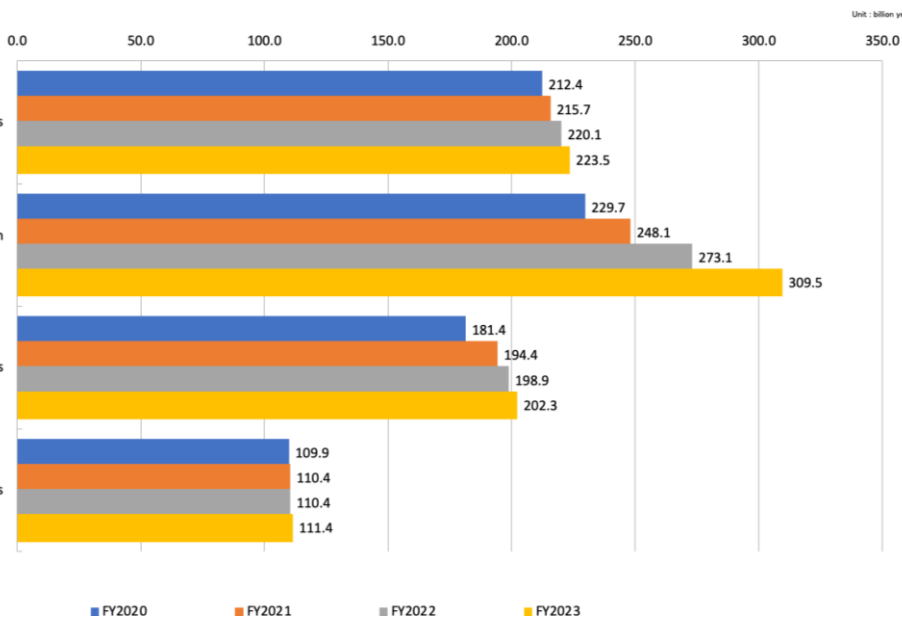
Information Security Tools Market Trends

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Tools

FY2021

768.6 billion yen

↑4.8% increment

FY2020

733.5 billion yen

Pie chart (FY2021):
- Identity and access management products: 110.4 billion yen (14.4%)
- Endpoint protection and management products: 215.7 billion yen (28.1%)
- Network protection and detection/perimeter protection products: 248.1 billion yen (32.3%)
- Content security products: 194.4 billion yen (25.3%)

- The rapid spread of the zero-trust concept from the traditional perimeter based defense concept, as well as increased awareness and adoption of EDR products, led to their widespread use in FY2021. Market expansion is expected to continue in FY2022 and beyond.
- The expansion of cloud services and remote working has led to the spread of the zero-trust concept and increased demand for perimeter defense products.
- Sales of DLP and encryption products have risen and are expected to continue to rise as the risk of information leakage increased due to the diversification of work styles, such as teleworking.
- Demand for identity management and logon management products expanded in proportion to the shift of enterprises to cloud computing and the growing demand for SaaS based products.
- On the other hand, the need for products specialized in authentication management has been declining due to the shift to authentication applications and incorporation of conventional authentication into other security products, and is expected to continue to decline in the future.
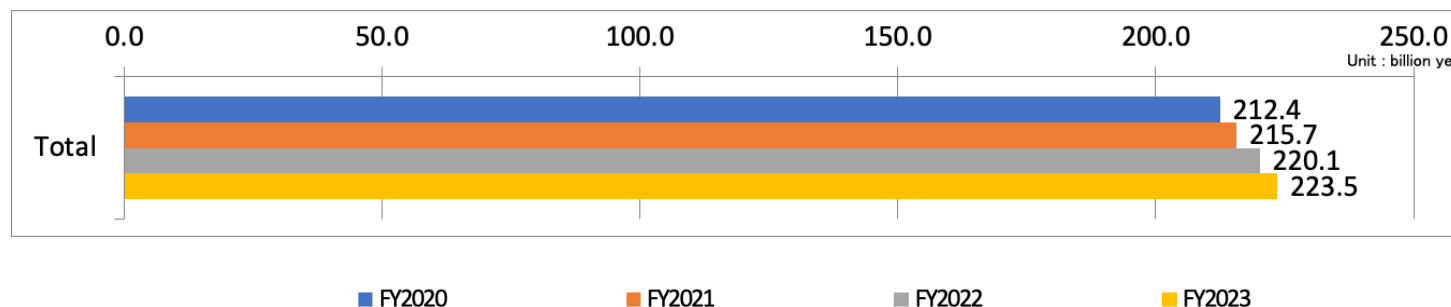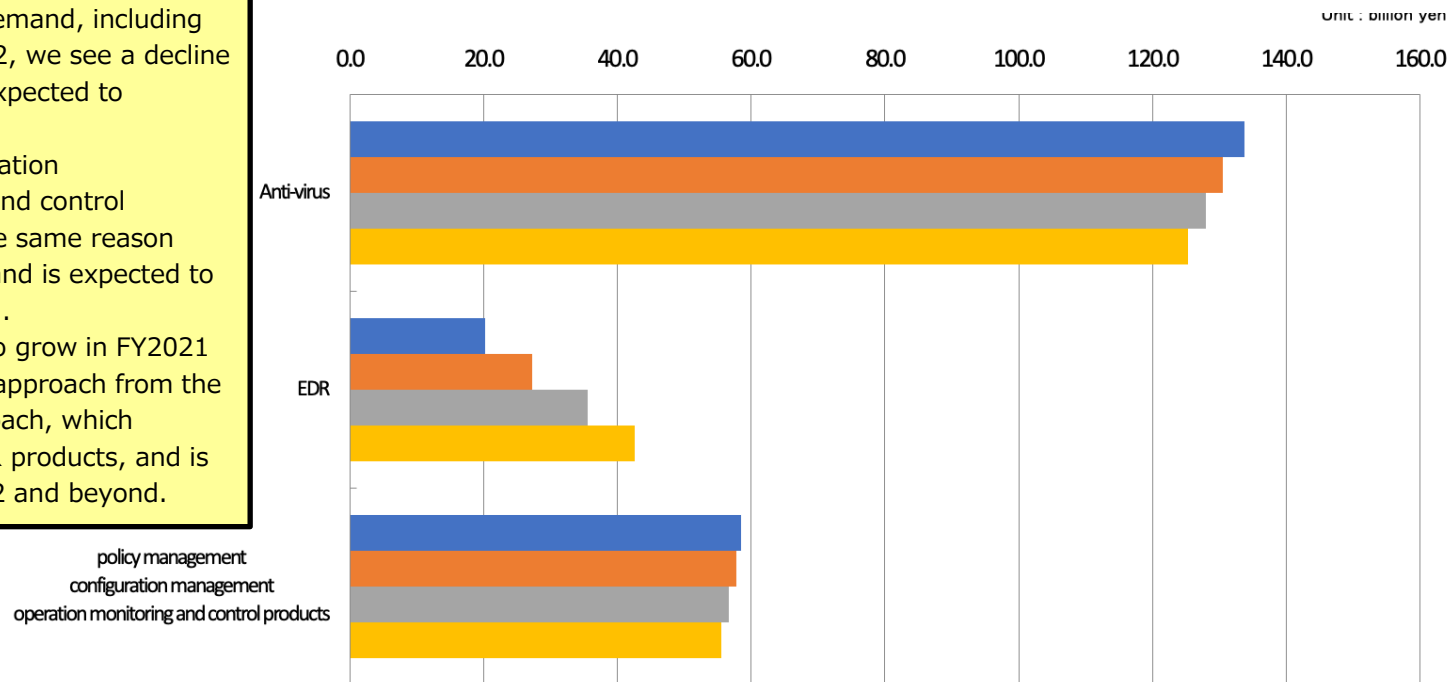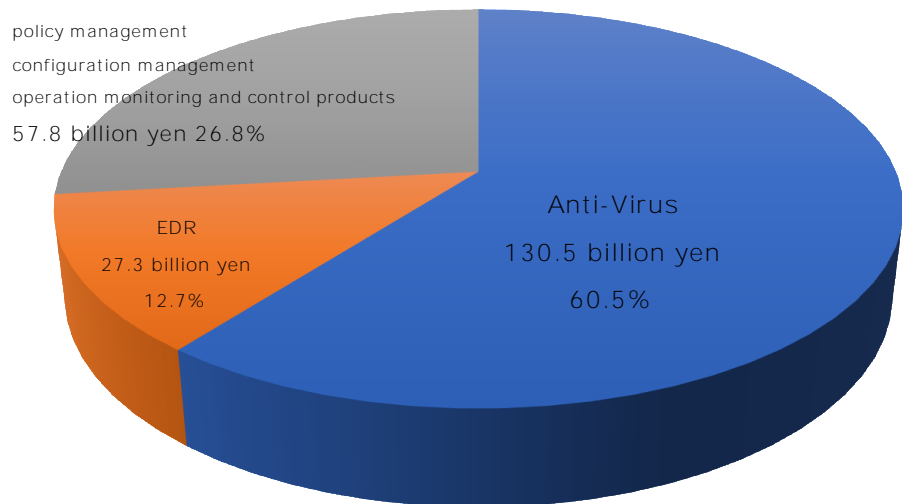
Bar chart (Unit : billion yen):

Product	FY2020	FY2021	FY2022	FY2023
Endpoint protection and management products	212.4	215.7	220.1	223.5
Network protection and detection/perimeter protection products	229.7	248.1	273.1	309.5
Content security products	181.4	194.4	198.9	202.3
Identity and access management products	109.9	110.4	110.4	111.4

Stacked bar chart (Unit : billion yen):

	FY2020	FY2021	FY2022	FY2023
Total	734	769	803	847
Identity and access management products	109.9	110.4	110.4	111.4
Content security products	181.4	194.4	198.9	202.3
Network protection and detection/perimeter protection products	229.7	248.1	273.1	309.5
Endpoint protection and management products	212.4	215.7	220.1	223.5

■ Endpoint protection and management products
■ Network protection and detection/perimeter protection products
■ Content security products
■ Identity and access management products

Endpoint Protection Management Products

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FY2021

2 1 5 . 7 billion yen

↑1.5% % increment

FY2020
2 1 2 . 4 billion yen

- New purchases of antivirus products (for individuals and businesses) declined in FY2021 since there was a sharp drop in PC demand. As a result, overall demand, including renewals, declined slightly. Also in FY2022, we see a decline in PC shipments, and the same trend is expected to continue.
- Demand for policy management, configuration management, and operation monitoring and control products also shrank in FY2021 due to the same reason that corporate PC demand has declined, and is expected to continue to decline in FY2022 and beyond.
- The market for EDR products continued to grow in FY2021 due to the rapid spread of the zero-trust approach from the traditional perimeter based defense approach, which increased awareness and adoption of EDR products, and is expected to continue to expand in FY2022 and beyond.

Unit : billion yen

policy management
configuration management
operation monitoring and control products
57.8 billion yen 26.8%

EDR
27.3 billion yen
12.7%

Anti-Virus
130.5 billion yen
60.5%

Total
212.4
215.7
220.1
223.5

Unit : billion yes

■ FY2020 ■ FY2021 ■ FY2022 ■ FY2023

Network Protection and Detection/Perimeter Protection Products

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FY2021

２４８.１ billion yen

↑ 8 % increment

FY2020

２２９.７ billion yen

- Along with the expansion and spread of cloud services and remote work, demand for perimeter defense products also increased.
- In particular, demand for security information management systems is increasing for centralized management of log information and real-time monitoring and analysis, as well as for next-generation FW products with advanced real-time detection functions and enhanced integration with endpoint management.
- It can be inferred that the VPN connectivity product category has declined due to the shift in the location of corporate data to cloud storage services.
- However, this category is expected to continue to expand in the future against the backdrop of further progress of DX, cloud services, and the diversification of working environments.
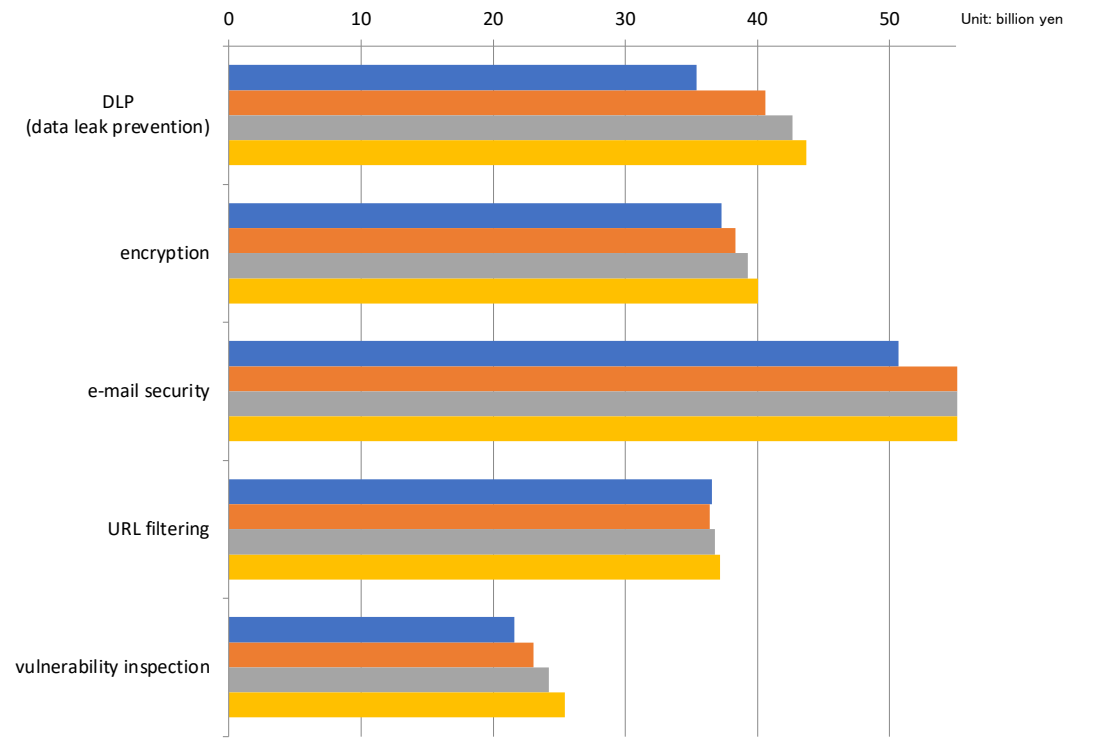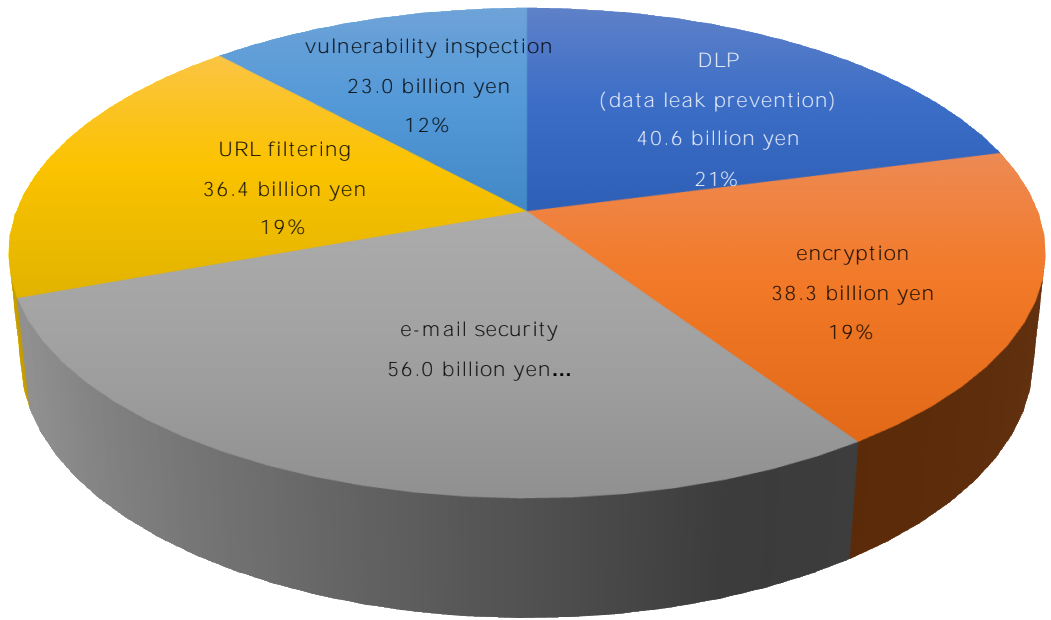
Unit: billion yen

Pie chart:
- security information management system: 61.1 billion yen, 25%
- physical security: 18.0 billion yen, 7%
- FW: 37.3 billion yen, 15%
- VPN connection: 23.7 billion yen, 10%
- IDS/IPS: 34.5 billion yen, 14%
- WAF: 33.4 billion yen, 13%
- UTM: 40.1 billion yen, 16%

Bar chart categories: FW, VPN connection, IDS/IPS, WAF, UTM, security information management system, physical security

Unit: billion yen

Total:
- FY2020: 229.7
- FY2021: 248.1
- FY2022: 273.1
- FY2023: 309.5

■FY2020 ■FY2021 ■FY2022 ■FY2023

Content security products

FY2021
1 9 4 . 4 billion yen

↑7.1%increment
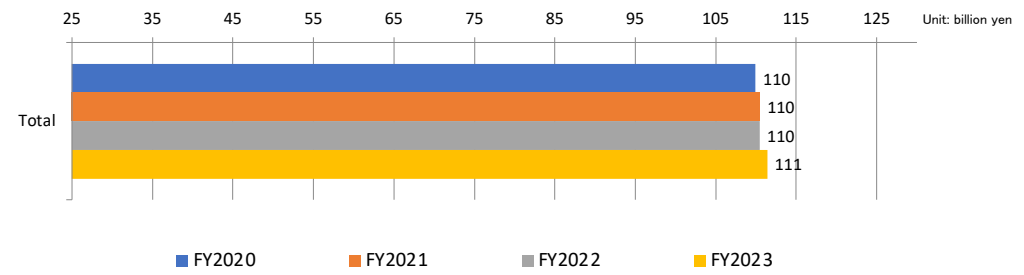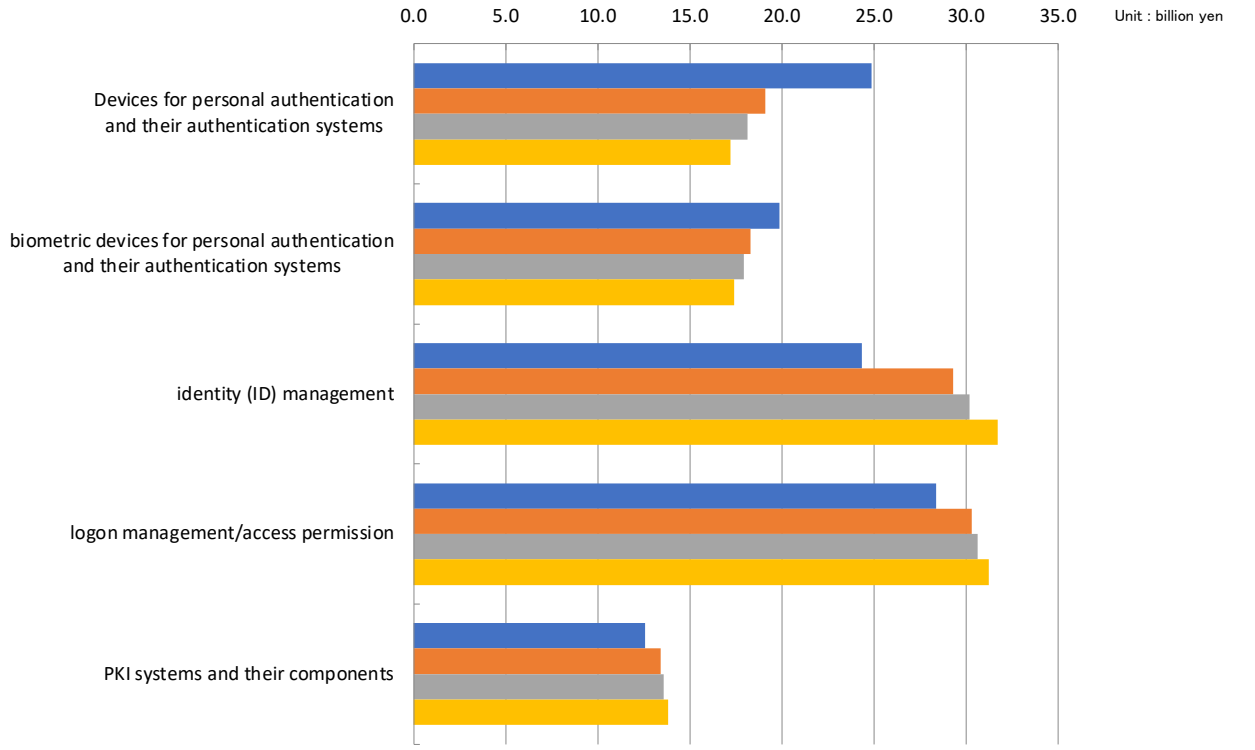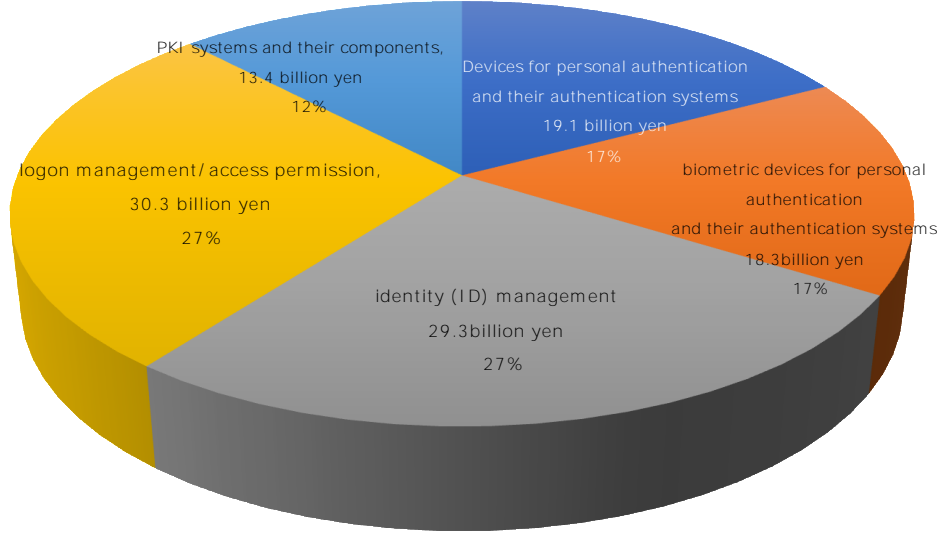
FY2020
1 8 1 . 4 billion yen

- Sales of DLP and encryption products are rising as the risk of information leakage increases due to diversification of work styles such as teleworking. The trend of increase is expected to continue in the future.
- Demand for e-mail security temporarily expanded due to the rise of PPAP alternative solutions, but is expected to remain flat going forward.
- Demand for vulnerability investigation products is expected to continue to grow due to the cloud environment expansion.

DLP (data leak prevention) 40.6 billion yen 21%

encryption 38.3 billion yen 19%

e-mail security 56.0 billion yen...

URL filtering 36.4 billion yen 19%

vulnerability inspection 23.0 billion yen 12%

Unit: billion yen

- DLP (data leak prevention)
- encryption
- e-mail security
- URL filtering
- vulnerability inspection

Total: 181, 194, 199, 202

Unit: billion yen

■ FY2020　■ FY2021　■ FY2022　■ FY2023

Identity and access management products

JNSA

FY2021
１１０.４ billion yen

↑0.5% increment

FY2020
１０9.9 billion yen

- Demand for identity management and logon management products is growing in proportion to the shift of enterprises to cloud computing and the increasing demand for SaaS based products. It is expected to continue to increase in the future.
- On the other hand, for traditional authentication (device and biometric), the need for products specializing in authentication management has been declining and is expected to continue to decline due to the shift to authentication applications and incorporation into other security products.

Pie chart:
- Devices for personal authentication and their authentication systems 19.1 billion yen 17%
- biometric devices for personal authentication and their authentication systems 18.3billion yen 17%
- identity (ID) management 29.3billion yen 27%
- logon management/ access permission, 30.3 billion yen 27%
- PKI systems and their components, 13.4 billion yen 12%

Bar chart (Unit : billion yen):
- Devices for personal authentication and their authentication systems
- biometric devices for personal authentication and their authentication systems
- identity (ID) management
- logon management/access permission
- PKI systems and their components

Total (Unit: billion yen):
- FY2020 110
- FY2021 110
- FY2022 110
- FY2023 111

Legend: ■ FY2020 ■ FY2021 ■ FY2022 ■ FY2023

Information Security Services Market Trends

JNSA

Services

FY2021
５６３.６ billion yen
↑5.9% increment

FY2020
５３２.２ billion yen

Pie chart (FY2021):
- Peripheral services, 93.9 billion yen, 16.7%
- Consulting/diagnostic services, 228.0 billion yen, 40.5%
- Managed and operation services, 241.7 billion yen, 42.9%
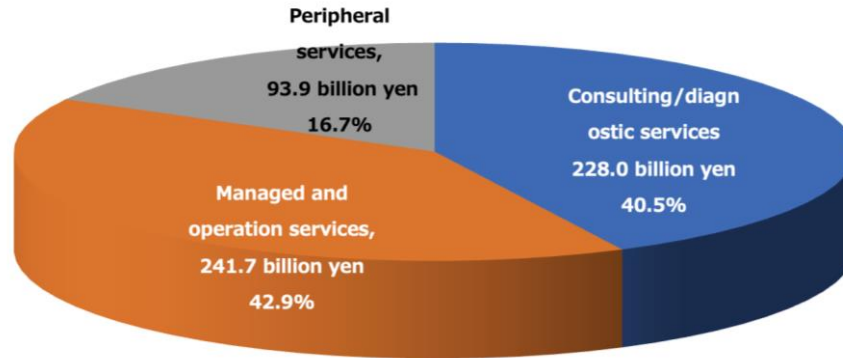
- Demand for consulting services grew steadily, supported by the rapid shift to teleworking, compliance with cybersecurity guidelines for each industry sector, and the DX/GX investment promotion taxation.
- Demand for incident response and forensics services grew at a high rate, reflecting the growing need to analyze logs, determine the causes, and prevent cyber attacks and information leakage caused by employees taking information out of the company.
- With COVID-19 showing signs of slowing down, we expect that literacy education and certification support will not only increase the need for in-person training, but also show a growth trend due to the expansion of the business area through the use of online services.

Bar chart (Unit : billion yen):

Category	FY2020	FY2021	FY2022	FY2023
Consulting/diagnostic services	227.0	228.0	231.2	235.3
Managed and operation services	214.5	241.7	276.0	316.3
Peripheral services	90.6	93.9	96.8	100.0

Stacked bar chart (Unit : billion yen):

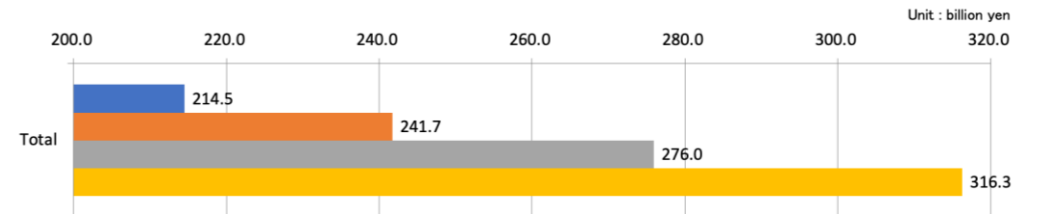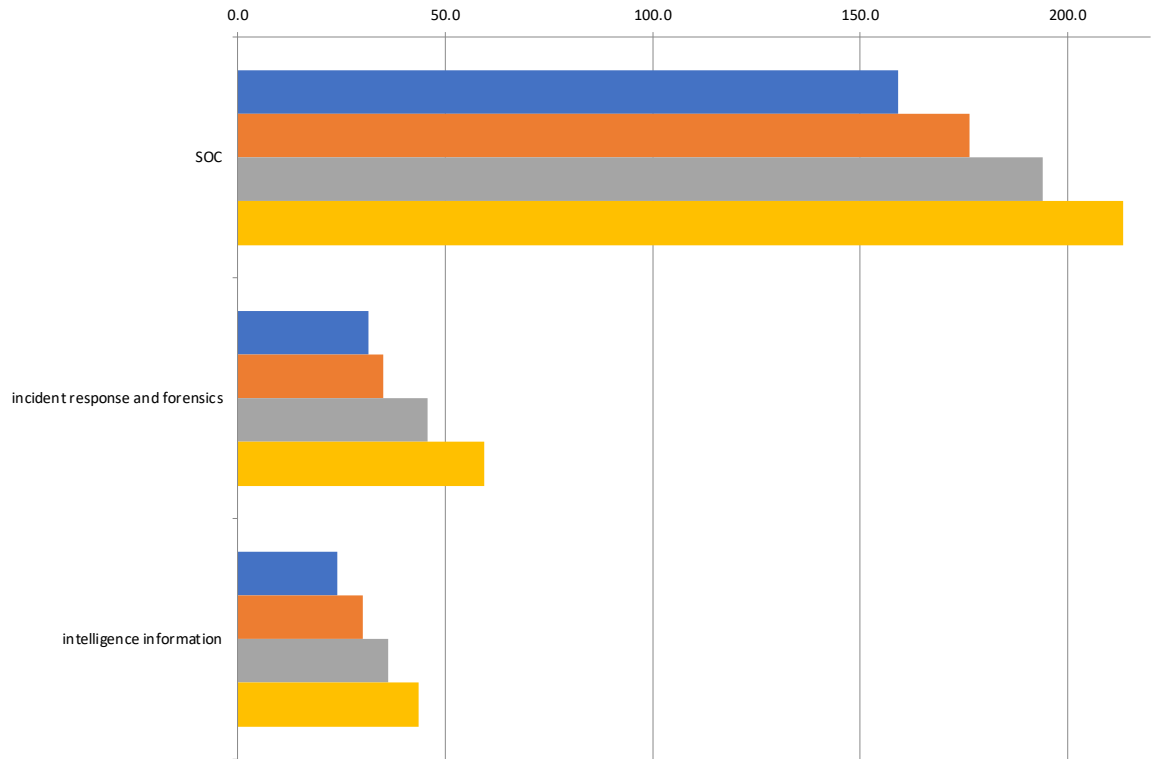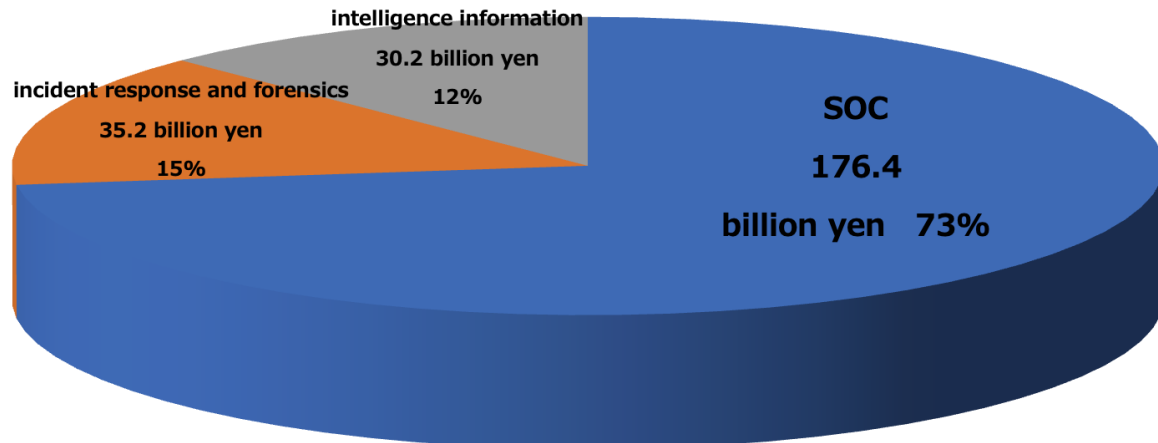|	FY2020	FY2021	FY2022	FY2023
Total	532.2	563.6	603.9	651.6
Peripheral services	90.6	93.9	96.8	100.0
Managed and operation services	214.5	241.7	276.0	316.3
Consulting/diagnostic services	227.0	228.0	231.2	235.3

Managed and operation services

JNSA
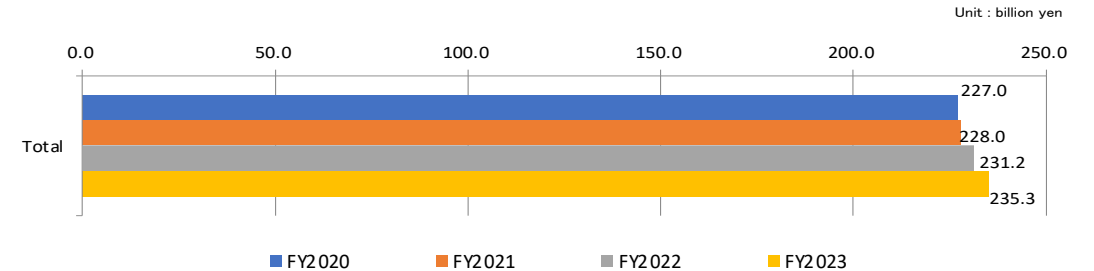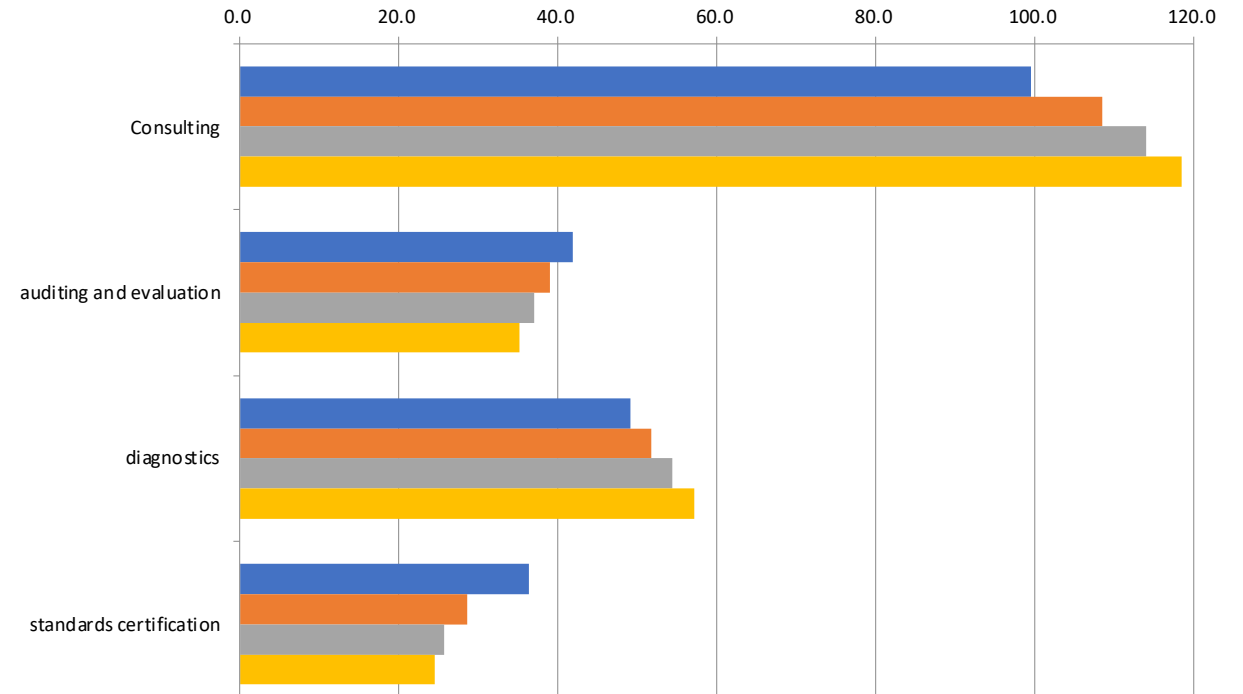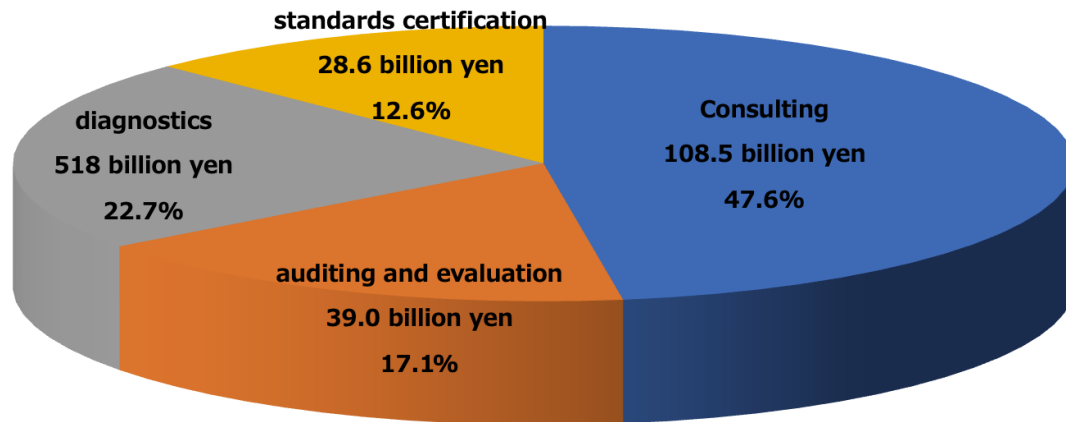
FY2021
2 4 1.7 billion yen

↑12.7% increment

FY2020
2 1 4.5 billion yen

- Overall sales increased compared to the previous year. Especially the growth rate for incident response and forensics was high. This is due to the growing need to analyze logs, determine the causes, and prevent cyber attacks and information leakage caused by employees taking information out of the company.
- Cyberattacks and cyber incidents against companies are expected to increase in FY2022 and beyond. In addition, as many companies must handle enormous amounts of electronic data due to the Electronic Bookkeeping Law, etc., sales growth trend in this category is expected to continue.

intelligence information
30.2 billion yen
12%

incident response and forensics
35.2 billion yen
15%

SOC
176.4
billion yen   73%

SOC

incident response and forensics

intelligence information

Unit : billion yen

Total
214.5
241.7
276.0
316.3

■ FY2020   ■ FY2021   ■ FY2022   ■ FY2023

Peripheral services
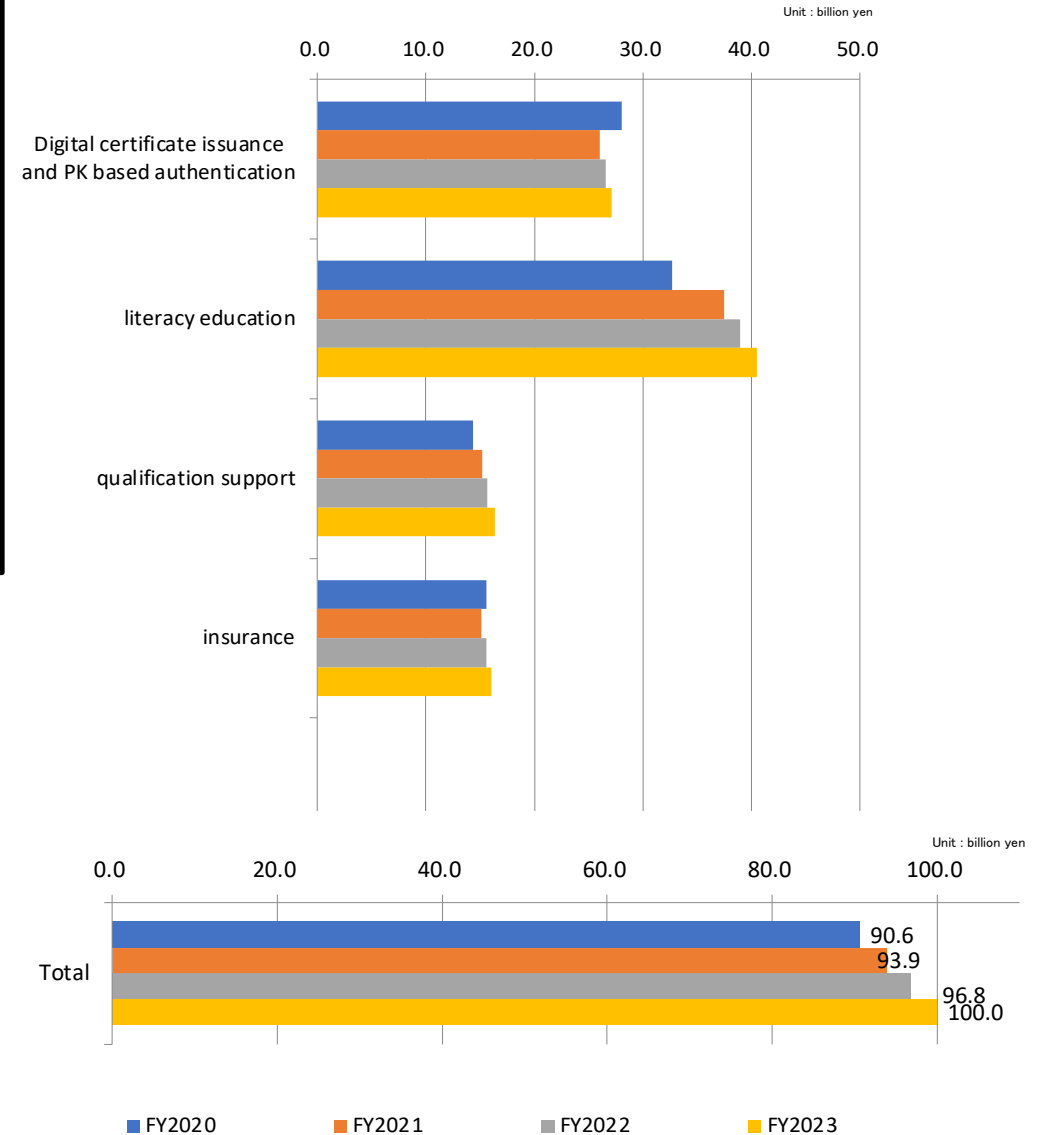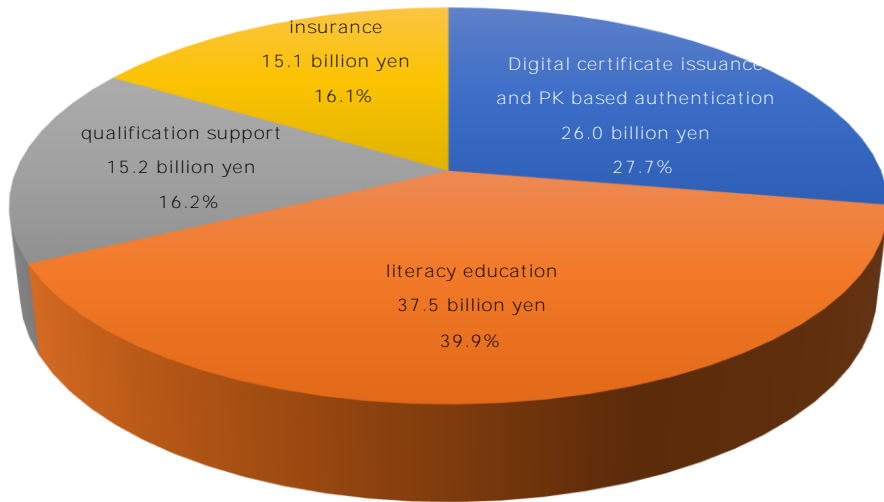
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FY2021
9 3.9 billion yen
↑3.6% increment

FY2020
9 0.6 billion yen

- With COVID-19 showing signs of slowing down, focus for literacy education and certification support is thought to be a result of the segment of the population that has been desiring for learning opportunities seeking education. We expect that not only the need for in-person training has increased, but also that there is a growth trend due to the expansion of the business area through the use of online.
- Electronic certificate issuance, PK based certificates, and insurance decreased as the spread of free certificates and other factors are expected to have an impact. Insurance remained flat and this may be due in part to the fact that it is difficult to directly reflect the results in the market due to sales as an ancillary service. However, this market segment is expected to grow in importance, so the next trends will be interesting to watch.

Unit : billion yen

insurance
15.1 billion yen
16.1%

qualification support
15.2 billion yen
16.2%

Digital certificate issuance and PK based authentication
26.0 billion yen
27.7%

literacy education
37.5 billion yen
39.9%

Unit : billion yen

Total
90.6
93.9
96.8
100.0

■ FY2020   ■ FY2021   ■ FY2022   ■ FY2023

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JNSA Survey and Research Subcommittee
Security Market Research WG

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END