

Security Industry Market Share Analysis

March 2011

Introduction

OPSWAT releases quarterly market share reports for several sectors of the security industry. This quarter's report includes both worldwide and North American market share and usage data for antivirus software, Windows Operating Systems, and for the first time, peer to peer applications. The data used was collected between November 16, 2010 and February 15, 2011. Please note that OPSWAT is not a research institution; this report aims to distribute the unique data collected to inspire public discussion, not to make any claims as to why changes have occurred.

About OPSWAT

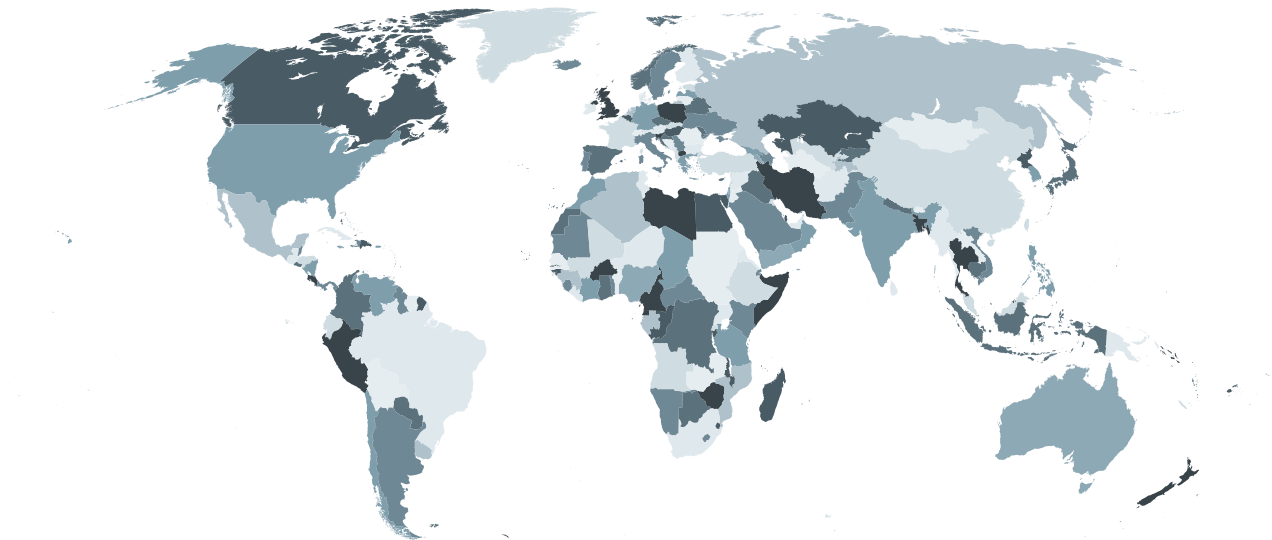
Founded in 2002, OPSWAT provides software engineers and IT professionals with development tools and data services to power manageability and security solutions. The company's primary product, OESIS Framework, is a manageability solution licensed by major technology companies like Cisco Systems, Juniper Networks, F5 Networks, Microsoft, HP and many others. Having been adopted as the industry standard software development toolkit (SDK) for creating compliance and manageability applications, the framework's application libraries have now been deployed on over fifty million endpoint systems worldwide. To learn more about OESIS, please visit the product page at www.opswat.com/products/oesis-frameworkae.

The Research

This report shows usage data for security applications on Windows systems. The data was collected using OPSWAT's AppRemover and Am I OESIS OK? tools, which utilize the detection capabilities of the OESIS Framework to collect information regarding the applications installed on endpoint computers. These tools are free for download on www.appremover.com and www.opswat.com/certified/am-i-oesis-ok, and are used around the world by home and business users, both expert and inexperienced in security software. The sample is assumed to be representative of the market based on the wide accessibility of these tools to a large range of users.

If the user of the tool opts in, a report of the applications installed on the computer is created. These opt-in reports are compiled to generate the market share calculations in this report. More than 92,000 data points were compiled for this report.

In addition to applications detected by the OESIS Framework, other well known applications are also included in the peer to peer market share based on registry searches. OPSWAT acknowledges that not every security application is included in this report. Antivirus, peer to peer and other security application vendors interested in inclusion in these reports and the OESIS Framework are encouraged to contact certification@opswat.com to learn how to partner with OPSWAT.

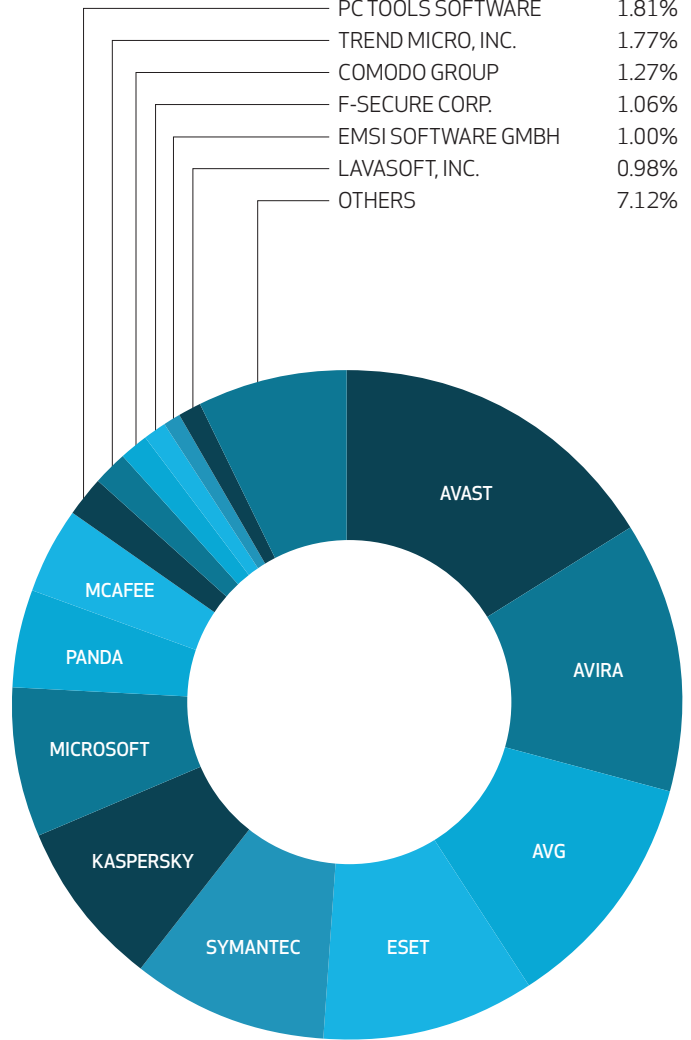


Worldwide Antivirus Vendor Market Share

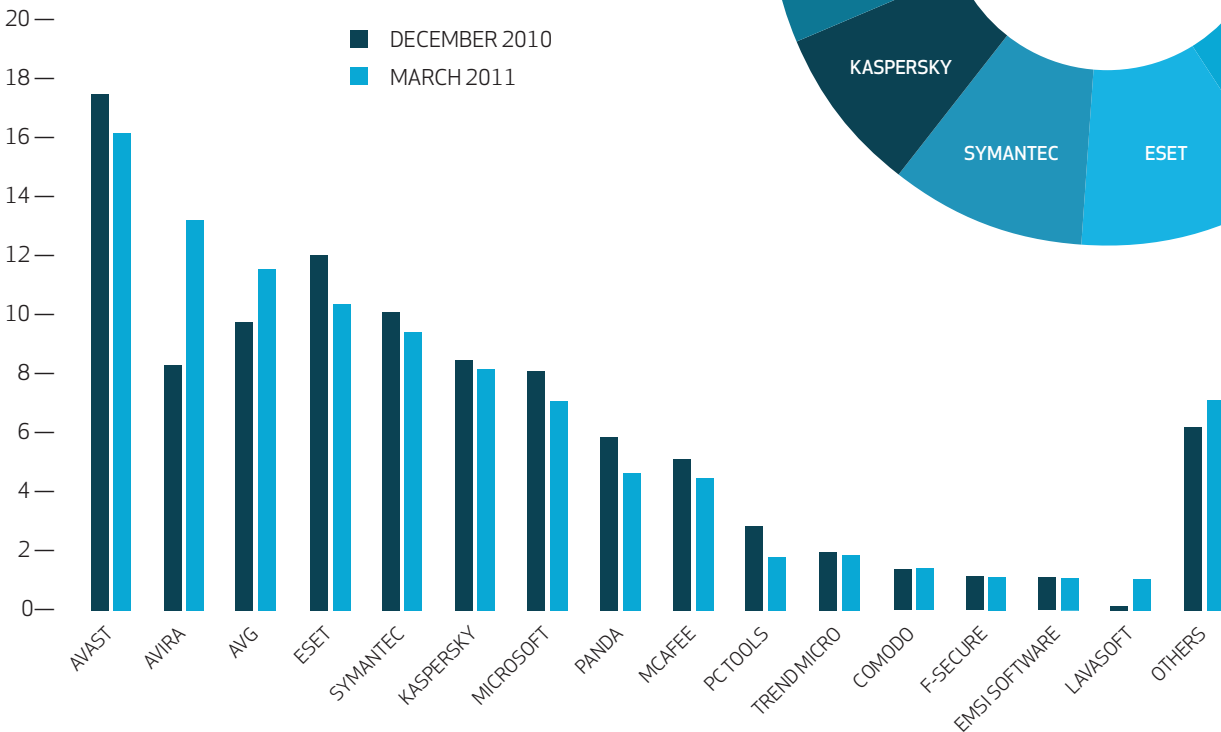
The avast! Antivirus product line has helped AVAST Software maintain its position as the top antivirus vendor worldwide for the last two quarters, despite a slight drop to 16.19% global market share in this report. Avira GmbH and AVG Technologies are second and third in global market share with 13.22% and 11.47% respectively. In comparison to the worldwide data from our December 2010 report, Avira GmbH shows a considerable increase of 4.96%, which could result from a higher percentage of the current data originating from countries where they have a stronger hold on the market. The only other worldwide market share increases were by AVG, with a 1.76% gain from the December report, Lavasoft, with a 0.82% rise, and Comodo, with a minimal increase of 0.06%.

WORLDWIDE MARCH 2011

AVAST SOFTWARE	16.19%
AVIRA GMBH	13.22%
AVG TECHNOLOGIES	11.47%
ESET SOFTWARE	10.29%
SYMANTEC CORP.	9.47%
KASPERSKY LABS	8.16%
MICROSOFT CORP.	7.04%
PANDA SECURITY	4.76%
MCAFEE, INC.	4.38%
PC TOOLS SOFTWARE	1.81%
TREND MICRO, INC.	1.77%
COMODO GROUP	1.27%
F-SECURE CORP.	1.06%
EMSI SOFTWARE GMBH	1.00%
LAVASOFT, INC.	0.98%
OTHERS	7.12%



DECEMBER 2010 VS. MARCH 2011

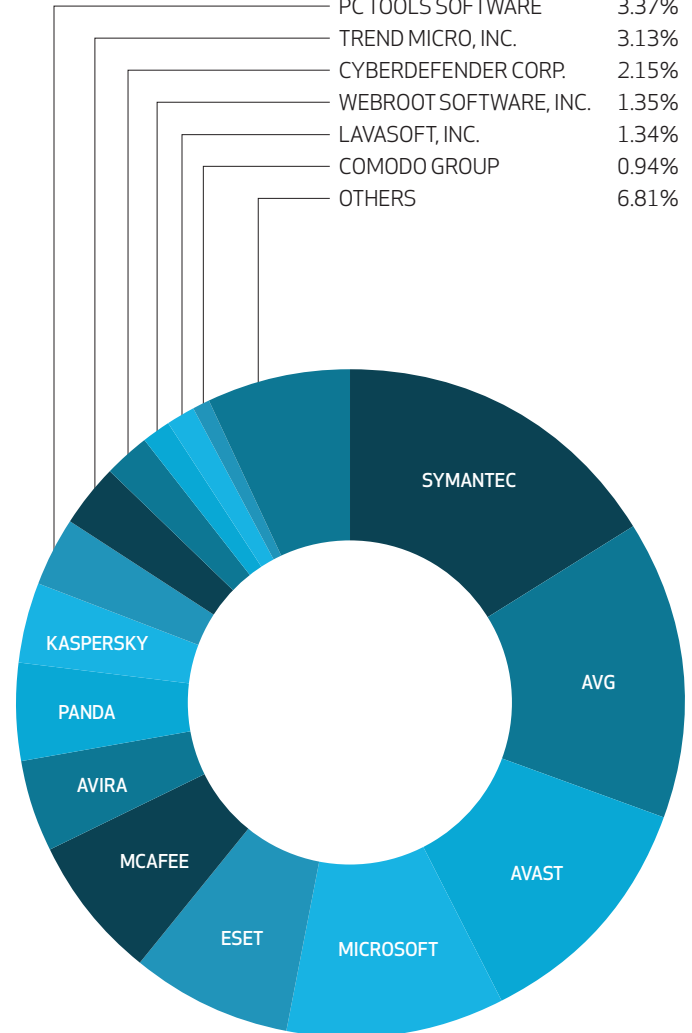


N. America Antivirus Vendor Market Share

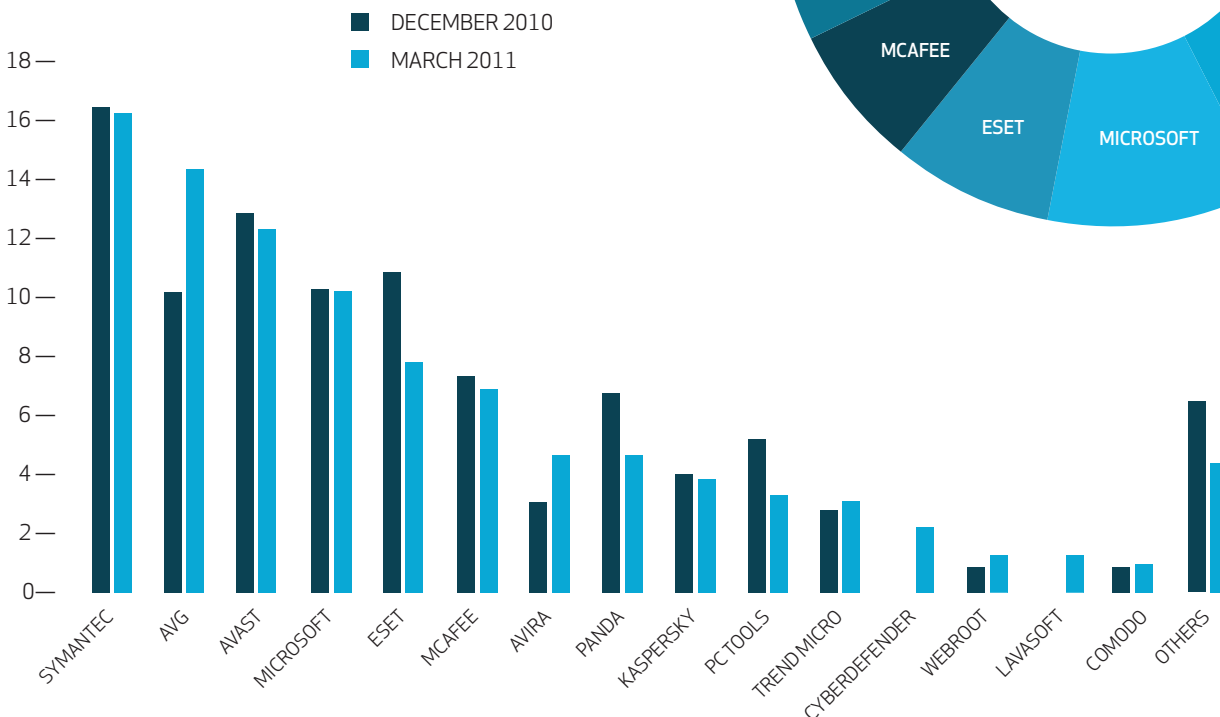
Symantec has continually held the largest share of the North American antivirus market over the past six months. However, with 16.24% market share for March 2011, they continue a slightly downward trend from September 2010. This quarter shows a strong gain by AVG, reaching 14.41% market share to become the second leading vendor behind Symantec. Avira also shows a slight increase in North American market share, as do Trend Micro, Inc., Webroot Software and Comodo Group.

NORTH AMERICA MARCH 2011

SYMANTEC CORP.	16.24%
AVG TECHNOLOGIES	14.41%
AVAST SOFTWARE	12.11%
MICROSOFT CORP.	10.37%
ESET SOFTWARE	7.74%
MCAFFEE, INC.	6.91%
AVIRA GMBH	4.63%
PANDA SECURITY	4.63%
KASPERSKY LABS	3.85%
PC TOOLS SOFTWARE	3.37%
TREND MICRO, INC.	3.13%
CYBERDEFENDER CORP.	2.15%
WEBROOT SOFTWARE, INC.	1.35%
LAVASOFT, INC.	1.34%
COMODO GROUP	0.94%
OTHERS	6.81%



DECEMBER 2010 VS. MARCH 2011

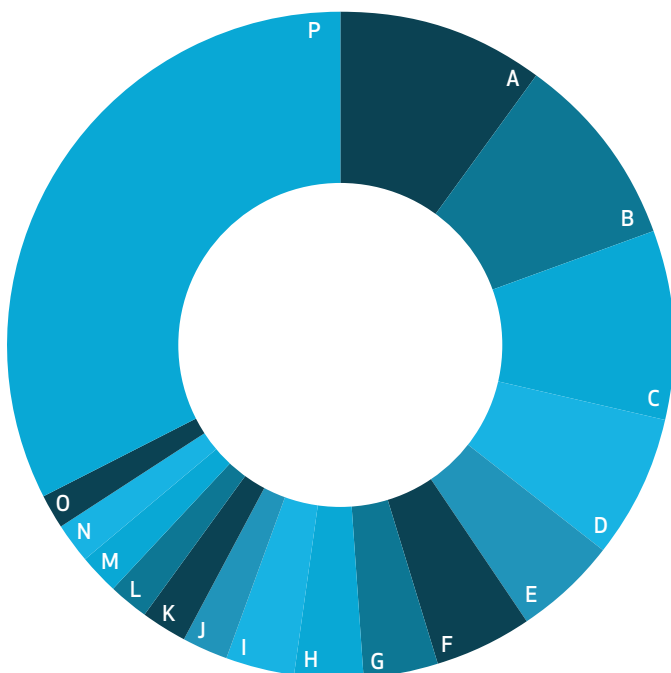


Antivirus Product Market Share

The top ten individual antivirus products in North America have increased their control of the market over our December 2010 report. Combined, A-J below control 57.92% of the North American AV market. Microsoft's Security Essentials Antivirus continues to lead with 10.22% of the market, a slight increase over our December 2010 report. "Free" antivirus solutions remain dominant, with each of the top 3 products in North America available free for download.

NORTH AMERICA MARCH 2011

A	MICROSOFT SECURITY ESSENTIALS (ANTIVIRUS)	10.22%
B	AVAST!FREE ANTIVIRUS	9.34%
C	AVG ANTIVIRUS FREE	9.24%
D	NORTON ANTIVIRUS	6.88%
E	MCAFEE VIRUSSCAN	4.98%
F	ESET NOD32 ANTIVIRUS	4.63%
G	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	3.87%
H	NORTON 360	3.32%
I	AVG 10 [ANTIVIRUS]	3.18%
J	ESET SMART SECURITY	2.26%
K	CYBERDEFENDER ANTIVIRUS	2.15%
L	SYMANTEC ENDPOINT PROTECTION	2.14%
M	KASPERSKY INTERNET SECURITY	1.91%
N	PANDA CLOUD ANTIVIRUS	1.89%
O	MCAFEE VIRUSSCAN ENTERPRISE	1.76%
P	OTHERS	32.23%



Conclusions

In North America, fifty-six different antivirus vendors were detected in this report. The top five of those vendors combined to control 60.87% of the antivirus market. The worldwide market shows a similar trend, with the top five of seventy vendors controlling 60.64% of the antivirus market.

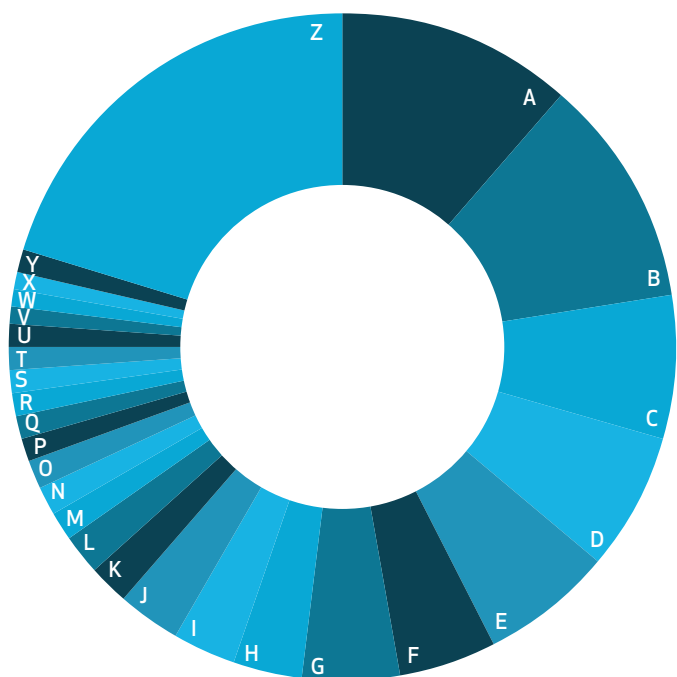
Free solutions are popular, as shown in the individual product market share. Vendors who offer the top free solutions are able to occupy the top of the market by vendor as well. Symantec maintains a strong hold over the North American market, despite having only paid products in the top 15, with Norton 360 only ranking eighth.

Several companies who fare very well in the worldwide market still have yet to achieve a large share of the North American market. Both Avira and Kaspersky have more than twice as much market share worldwide than in North America. Similarly, Microsoft is one of the top five antivirus vendors in North America, but is only seventh worldwide.

Antivirus Product Market Share

WORLDWIDE MARCH 2011

A	AVAST!FREE ANTIVIRUS	11.55%
B	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	10.98%
C	MICROSOFT SECURITY ESSENTIALS (ANTIVIRUS)	6.97%
D	AVG ANTIVIRUS FREE	6.77%
E	ESET NOD32 ANTIVIRUS	6.39%
F	KASPERSKY INTERNET SECURITY	4.76%
G	NORTON ANTIVIRUS	4.60%
H	AVG 10 [ANTIVIRUS]	3.34%
I	MCAFFEE VIRUSSCAN	3.04%
J	ESET SMART SECURITY	3.02%
K	PANDA CLOUD ANTIVIRUS	2.07%
L	KASPERSKY ANTIVIRUS	1.99%
M	AVAST! INTERNET SECURITY	1.36%
N	AVAST! ANTIVIRUS PROFESSIONAL	1.33%
O	NORTON 360	1.30%
P	MCAFFEE VIRUSSCAN ENTERPRISE	1.23%
Q	SYMANTEC ENDPOINT PTOTECTION	1.18%
R	AVG 9 [ANTIVIRUS]	1.10%
S	AVIRA PREMIUM SECURITY SUITE	1.07%
T	AVAST! ANTIVIRUS	1.07%
U	SYMANTEC ANTIVIRUS	1.04%
V	EMSISOFT ANTIMALWARE	0.95%
W	PANDA ACTIVE SCAN 2.0	0.90%
X	NORTON INTERNET SECURITY	0.90%
Y	AD-AWARE PRO INTERNET SECURITY [ANTIVIRUS]	0.88%
Z	OTHERS	20.24%



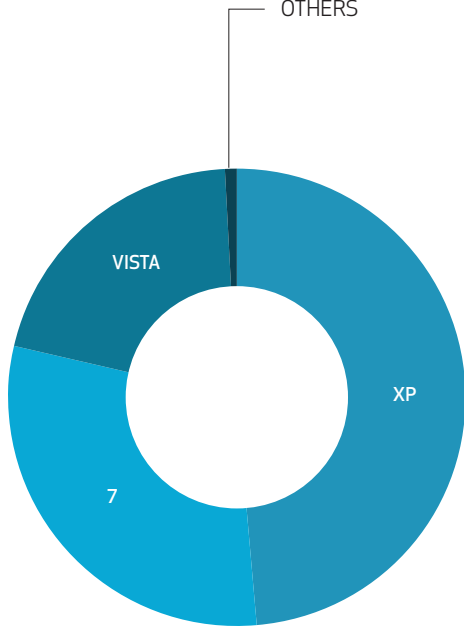
Windows Operating System Deployments

This quarter's North American Windows Operating Systems data shows that the trend away from Windows Vista towards Windows 7 remains steady. As with our December 2010 report, Windows 7 has again increased by almost 6% from the previous 3-month period. Further proving the trend towards Windows 7, Windows XP has a market share lower than 50% for the first time in our reports, which span the past 9 months.

While Windows XP maintains more than half of the worldwide Windows Operating System market, Windows 7 continues to increase its market share, and Windows Vista continues to decline. This report shows a 3.22% gain for Windows 7 and a 2.78% loss for Windows Vista from our December 2010 report.

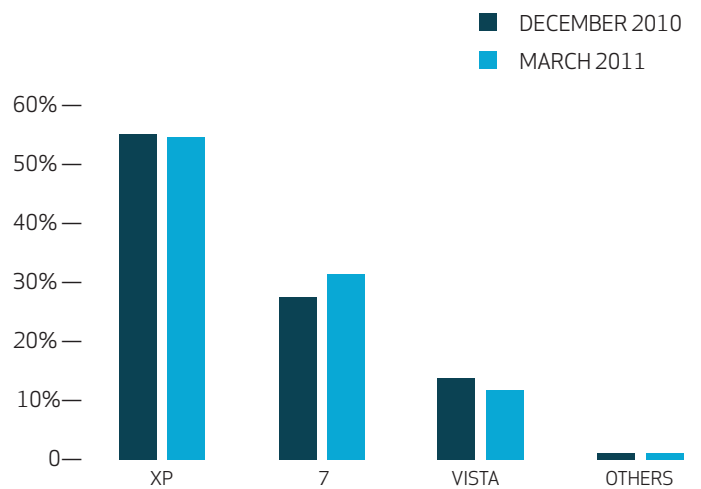
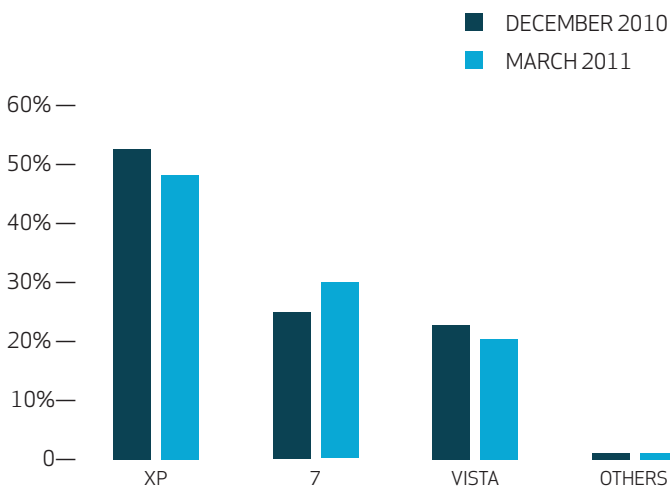
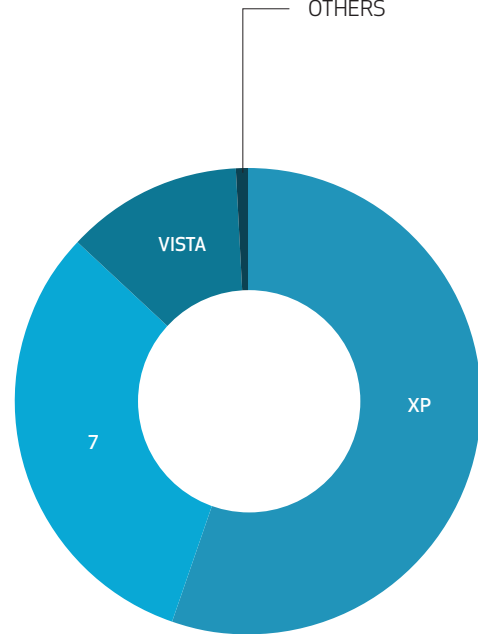
NORTH AMERICA MARCH 2011

WINDOWS XP	48.67%
WINDOWS 7	30.18%
WINDOWS VISTA	20.31%
OTHERS	<1.00%



WORLDWIDE MARCH 2011

WINDOWS XP	55.34%
WINDOWS 7	31.86%
WINDOWS VISTA	11.97%
OTHERS	<1%



Peer to Peer Application Market Share

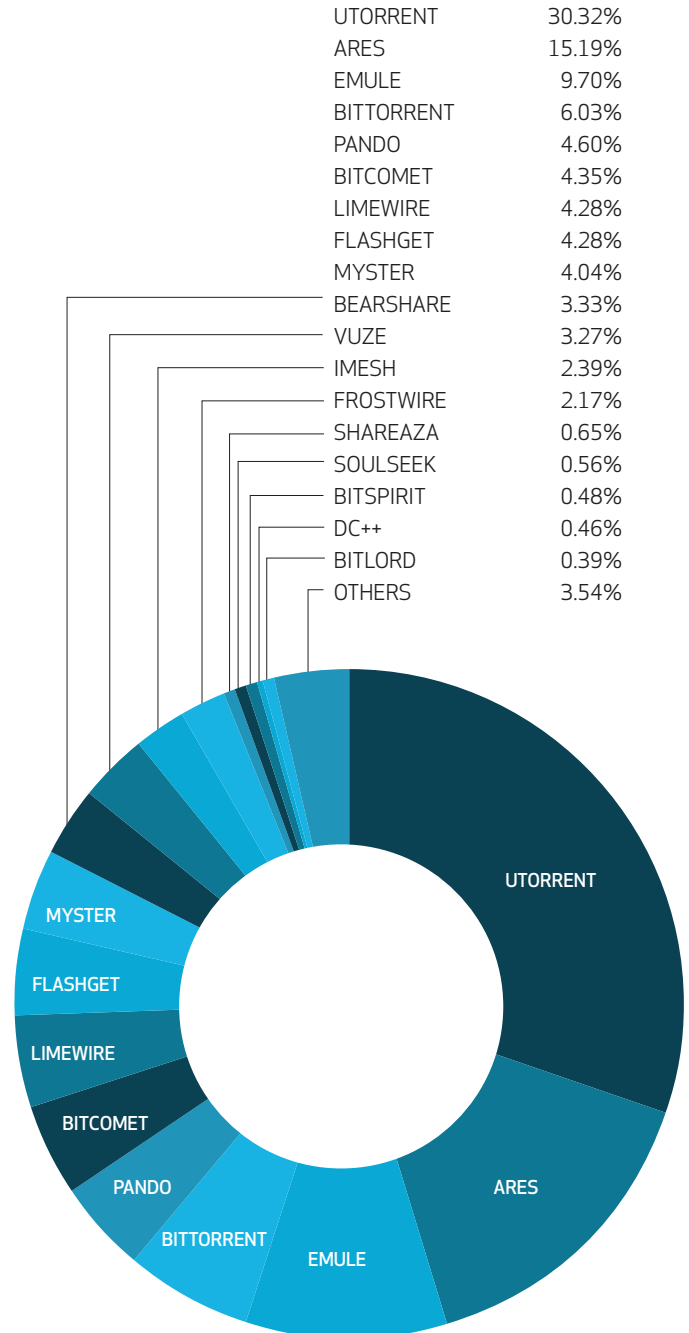
Of the 92,647 reports collected, 42,309 peer to peer (P2P) applications were detected. For the purpose of this report, we define a P2P application as a product with public file sharing as its primary function. Based on this definition, we have excluded Skype and Opera from the chart below.

While some consider Skype a P2P application, file sharing is only possible between contacts, rather than publicly, between peers. Opera has P2P capabilities, but it would be impossible to determine from our reports whether it was being used for P2P functions, or just as a browser. If added to the data, Skype would have 23.70% of the market and Opera would have 34.60%

Conclusions

Though not quite as dominant as the top three antivirus vendors, the top three P2P applications control more than half of the market, with a combined 55.21%.

P2P APPLICATION MARKET SHARE MARCH 2011



Contact and Reproduction Information

Please contact sales@opswat.com for more information on the OESIS Framework. For more information about this report, please contact marketing@opswat.com

Parties interested in hosting this report are free to do so as long as credit is given to OPSWAT, Inc. and a link is provided to www.opswat.com.

About OPSWAT

Founded in 2002, OPSWAT is the industry leader in software management SDKs, interoperability certification and multiple-engine scanning solutions. With both software manageability and multi-scanning products, OPSWAT offers simplified and comprehensive SDKs that reduce time and costs for your engineering and testing teams.

Products

OESIS

OESIS Framework is a cross platform, open development framework that enables software engineers and technology vendors to develop products that detect, classify and manage thousands of third-party software applications. OESIS is perfect for SSL VPN, network access control (NAC) and other manageability solutions, and is deployed on an estimated 100 million endpoints worldwide

Metascan

Metascan enables IT professionals and software engineers to enhance network security by integrating multi-scanning technology into their proprietary solutions. Metascan includes licenses for multiple built-in antivirus engines from market leaders such as CA, ESET, AVG and others, and allows for integration with other engines of your choice if needed. Using multiple engines significantly improves the likelihood of detecting malware, as your solution will be secure if any of the included engines detects the threat.

MD4SA/Malware Scanner

Powered by five anti-malware engines, MetaDefender for Secure Access (MD4SA) enables fast multi-scanning of endpoints for key loggers, viruses and other malware. Available as either a cloud service or hosted software package, MD4SA is ideal for quickly scanning endpoints' running processes and memory prior to a network, web or server login. Malware Scanner is also available as a ready-to-go application and demo built using MD4SA technology.

MDTA

MetaDefender Threat Analyzer (MDTA) is an automated static file analysis solution used to analyze files and detect the presence of malicious applications by using dozens of tightly integrated antivirus engines. A free, online demo using MDTA technology is available at www.filterbit.com.

MD4M

MetaDefender for Media (MD4M) is the ideal solution to protect your organization from risks associated with infected media present on peripheral devices such as USB drives and CDs/DVDs. MD4M scans your media using up to nine licensed antivirus engines simultaneously, enhancing content security with multi-scanning technology.

OPSWAT Certification

The OPSWAT Certification Program is a free interoperability program designed to enable technology partnerships between independent software vendors and leading network and technology solution vendors, by verifying that their security applications will work seamlessly with solutions employing the OESIS Framework. Additional information is available at www.opswat.com/certified.

AppRemover

The free AppRemover utility enables the thorough uninstallation of security applications like antivirus and antispyware from your computer. AppRemover is available for commercial licensing if you wish to deploy multiple copies of AppRemover within an organization or entity, or if you wish to bundle AppRemover with hardware, software or other services. More information is available at www.appremover.com.

Disclaimer of Warranty

OPSWAT Inc. makes no representation or warranties, either express or implied by or with respect to anything in this document, and shall not be liable for any implied warranties of merchantability or fitness for a particular purpose or for any indirect special or consequential damages.

Copyright Notice

OPSWAT, OESIS, Metascan, MetaDefender, AppRemover and the OPSWAT logo are trademarks and registered trademarks of OPSWAT, Inc. All other trademarks, trade names and images mentioned and/or used herein belong to their respective owners. No part of this publication may be reproduced, stored in a retrieval system or transmitted, in any form or by any means, photocopying, recording or otherwise, without prior written consent of OPSWAT Inc. No patent liability is assumed with respect to the use of the information contained herein. While every precaution has been taken in the preparation of this publication, OPSWAT Inc. assumes no responsibility for errors or omissions. This publication and features described herein are subject to change without notice.