

## **Software-Defined Security Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 124 pages | Mordor Intelligence

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### **Report description:**

The software-defined security market is expected to register a CAGR of 33.81% during the forecast period (2022-2027). Software-defined security is utilized in IT environments that use services of the cloud. Therefore, every time a new device enters the cloud environment, it is automatically masked and managed by the software-defined security protocol. Software-defined security systems are cost-effective and straightforward compared to traditional security models.

#### Key Highlights

Software-defined storage (SDS) is one of the new technologies trending in the enterprise storage market. SDS is part of a larger ecosystem where the software is separated from its respective hardware, revealing the freedom to choose installed hardware depending on the amount of storage needed. SDS enables cost savings while improving performance and flexibility. Thus, enterprises are slowly shifting toward software-defined storage.

Multiple associations shape how SDS is employed across end-user industries with direct connections to major vendors, most of which are involved in similar endeavors. The Storage Network Industry Association (SNIA) sets standards for the enterprise storage industry. The established storage vendors include IBM, Dell EMC, NetApp, and emerging players, like Atlantis Computing and Falcon Star. Some offer software, like NetApp, IBM, and RedHat, while others offer hyper-converged solutions, like HPE and Dell EMC. Others, like Cisco, offer hardware and partner with SDS software vendors.

The utilization of SDS on various platforms also encouraged integrability as an essential characteristic for consumer choice. In October 2021, NetApp introduced a Kubernetes-native data services integration to its Astro Datastore, bringing Kubernetes-native shared file services to customers looking to simplify the management of applications on Kubernetes. The vendor also expanded their relationship with the Google Cloud Platform with native support for NetApp Cloud Volume Services in the Google VMware Engine.?

Over the pandemic, software-defined storage has proven invaluable in rapidly expanding its customer base and accelerating

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top-line growth. For businesses during COVID-19 that continued to see unabated growth in storage but were unable to scale their Kubernetes container-based data management, there has been constant development primed toward enabling integrational capabilities across the platform case in point, the previously mentioned NetApp addition of Kubernetes capability.

## Software Defined Security Market Trends

### Cloud is Driving Software Defined Security

There has been a strong shift from a few years ago when most information security professionals saw the cloud as limited secure. The cloud is now seen as transformational rather than a possible security posture tradeoff, which threatens security hardware and infrastructure players, who have profited from growing cyberthreats and expanding increasingly connected networks. The cloud may prove to be the driver of security transformation.

Cloud infrastructure is being architected for new, rising demands, especially relevant to horizontal and vertical scale and security. Cloud environments will frequently adopt software and service-centric security solutions that can climb globally and seamlessly, without location-specific restrictions or constraints.

Moreover, digitalization will add to cloud delivery pressures and force IT into more software and services and away from hardware-defined tradeoffs. This factor, coupled with buyer consolidation and commoditization, will make infrastructure-as-a-service (IaaS) and managed service providers powered by software-defined abilities much more powerful than conventional hardware vendors. Therefore, due to such determinants, software-defined technologies are predicted to grow in the coming years.

### Asia-Pacific Accounts for the Fastest Growing Share in the Software-defined Security Market

Asia-Pacific is experiencing a rapid increase in the volume of unstructured data across various enterprises in the region, which is stored not only on-premise but also in cloud environments. In addition, with the proliferation of IoT across the region, the data generated at the edge is rapidly increasing. These factors have been supportive of a scalable storage architecture that is reliable and secure. ?

With high-density countries like China and India still relying on traditional hardware for their storage and the need for digital transformation to keep up with the technological changes, the region presents lucrative business for software-defined storage (SDS) vendors. ?

FalconStor, a prominent US-based vendor that offers SDS in China through Huawei, reported that customers/enterprises across Asia, such as China, are one of the largest potential markets for IT services and are positive about shifting to new storage. The propensity to shift was mainly to meet challenges, like data protection, recovery, and integration of virtual and non-virtualized resources. ?

In particular, hyper-scale and international digital media content providers and public cloud service providers, like Facebook, Google Amazon Web Services (AWS), and Alibaba Cloud, have been fundamental in pushing demand for remote storage services, significantly enhancing their uptake of data center capacity in the Asian region and particularly in Hong Kong over the past few years by building massive-scale platforms.?

## Software Defined Security Market Competitor Analysis

The software-defined security market is highly fragmented, as several cyber threats are forcing governments and respective

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industries to invest more in cyberspace. Increasing investments drive many new players to offer solutions at lower prices, making the market more competitive. Some of the key players in the market are IBM Corporation, Intel Corporation, EMC Corporation, Cisco Systems Inc. These players are constantly innovating and upgrading their product offerings to cater to the increasing market demand.

October 2021: NetApp announced the release of Spot Security. According to the company, the solution can analyze and secure cloud, infrastructure, and application data, network traffic, and user behavior using AI anomaly detection, threat prioritization, and remediation support. NetApp Spot, a solution for rapid infrastructure provisioning for installing and maintaining VM and Kubernetes applications on Azure, Google Cloud, and AWS, now includes Spot Security.

April 2021: IBM Corp. unveiled container-native software-defined storage and announced its foray into the hyper-converged infrastructure market with its appliance. In addition, the business is overhauling its ESS 5000 subsystem with 10% more storage capacity and releasing a new ESS 3200 array with double the read speed of its predecessor.

March 2021: Genetec Inc., a leading provider of unified security, operations, public safety, and business intelligence solutions, released Security Center 5.10, a new edition of its flagship unified security platform. This significant new update, among other things, allows more system components to function in the cloud, narrowing the gap between cloud and on-premises security systems.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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