Software Composition Analysis - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Software Composition Analysis Market size is estimated at USD 364.69 million in 2025, and is expected to reach USD 841.18 million by 2030, at a CAGR of 18.19% during the forecast period (2025-2030).

The software composition analysis (SCA) market has established itself as a critical component of the cybersecurity industry, driven by the increasing reliance on open-source software and the associated rise in security risks. SCA solutions are designed to identify vulnerabilities, ensure license compliance, and monitor outdated software dependencies, making them indispensable for organizations.

Key Highlights
- This is particularly relevant as heightened regulatory scrutiny and high-profile cyberattacks emphasize the risks associated with managing open-source components. The growing adoption of open-source software has further underscored the necessity for robust SCA solutions, enabling organizations to mitigate risks and maintain compliance in an increasingly complex threat environment.
- Open-source components often contain vulnerabilities, such as Log4j and Heartbleed, which can be exploited in both commercial and IoT environments. IoT devices, due to their extended lifecycles, are particularly vulnerable when outdated open-source dependencies are utilized. Additionally, regulatory frameworks such as GDPR, CCPA, and the EU Cyber Resilience Act mandate strict compliance with open-source licenses, further driving the adoption of SCA tools. The evolving regulatory landscape continues to compel organizations to prioritize open-source license management and vulnerability mitigation.
- The 2025 OSSRA (Open Source Security and Risk Analysis) report indicated that open-source software is nearly universal in commercial applications, with 97% of the evaluated applications incorporating open-source components. Organizations integrating open-source code into proprietary IoT firmware or SaaS products must ensure compliance to mitigate potential legal

disputes. Software Composition Analysis (SCA) tools are instrumental in automating license protection and compliance processes, thereby reducing legal risks. In addition to minimizing legal exposure, these tools enhance operational efficiency, enabling businesses to effectively manage complex software portfolios.
- The software composition analysis (SCA) market is significantly impacted by a shortage of skilled technical professionals. As organizations increasingly rely on open-source components, their ability to effectively implement and manage SCA solutions is constrained by a lack of expertise in software security, compliance, and vulnerability management. This talent gap not only slows the adoption of SCA tools but also limits their effectiveness in securing software supply chains. The growing dependence on open-source software further intensifies the challenge as enterprises struggle to address evolving threats and compliance requirements.

Software Composition Analysis Market Trends

IT and Telecom Segment Holds Major Share

- As IT companies increasingly turn to open-source software, the importance of Software Composition Analysis (SCA) has surged, especially in managing security vulnerabilities and ensuring license compliance. This growing reliance on open-source components underscores the rising demand for effective SCA solutions and services. Modern applications, now more than ever, depend on these open-source components, making it imperative to navigate the associated risks.
- Open-source technologies, celebrated for their flexibility, cost-effectiveness, and community-driven innovation, are witnessing a surge in adoption across diverse industries. Technologies such as Kubernetes, OpenStack, and OpenShift are at the forefront, driving advancements in cloud infrastructure and containerization. GitHub reported that in 2024, developers globally contributed over 5.2 billion times to 518 million open-source projects, both public and private. With IT companies not only investing in but also actively contributing to and launching their own open-source projects, the momentum is undeniable. Such dynamics are poised to amplify the demand for SCA solutions.
- Telecom companies are increasingly turning to Software Composition Analysis (SCA) solutions and services. This shift is largely driven by a growing dependence on open-source components and an urgent need for heightened security and compliance. As telecom networks evolve, they become more intricate and, consequently, more susceptible to cyber threats. For example, telecom firms frequently harness open-source software and libraries for diverse functions, spanning network management to cloud services.
- Cyber threats loom large over the telecom sector, manifesting as network intrusions, data breaches, and malware attacks, for instance. In 2023, Thailand's National Cyber Security Agency reported 13 cyber threats targeting the nation's IT and telecom sectors.
- The swift rollout of technologies such as 5G and IoT brings forth fresh vulnerabilities ripe for exploitation by cybercriminals. Moreover, advancements like Software-Defined Networking (SDN) and Network Function Virtualization (NFV) expand the potential attack surfaces. In this landscape, SCA emerges as a vital tool, adept at pinpointing and addressing vulnerabilities within the software supply chain. By scanning third-party code and libraries, SCA tools illuminate potential attack vectors, bolstering the industry's security stance.

Asia Pacific to Register Major Growth

- Application security testing company Synopsys' 14th Building Security in Maturity Model (BSIMM) report highlights rapid growth in automated security technologies. Organizations are using automation to enhance manual security measures, reducing costs and improving efficiency. Automation adoption has driven a 'shift-everywhere' approach, with automated, event-driven security

testing increasing by 200% in two years.
- Organizations are strengthening security culture; BSIMM14 shows a 21% rise in demand for robust vendor security practices, with firms holding vendors to internal standards.
- Software supply chain practices are gaining traction. Software Bill of Materials (SBOM) creation increased by 22% from last year, while open-source risk management grew by nearly 10%.
- In March 2024, Japan's NTT DATA Corporation and Synopsys Software Integrity Group announced a global partnership. The collaboration aims to deliver application security solutions supported by advisory and managed services to protect clients from software supply chain threats.
- NTT DATA Corporation will integrate Synopsys' Polaris Software Integrity Platform, including Black Duck for software composition analysis (SCA) and Coverity for static application security testing (SAST), into its offerings. These tools will help identify vulnerabilities in open-source software (OSS) libraries and user source code in commercial applications developed by NTT DATA or its clients.
- Under the "Digital India" initiative, the Government of India announced a policy promoting Open-Source Software (OSS) adoption in government bodies to enhance e-governance and reduce costs. Meanwhile, China is embracing open-source Artificial Intelligence (AI) models, boosting AI adoption and innovation, likened to an 'Android moment' for the industry.

Software Composition Analysis Industry Overview

The Software Composition Analysis (SCA) market has major players like Synopsys, Sonatype, Snyk, WhiteSource (mend.io), Black Duck, and Veracode, leading to intense competition. Companies are competing to integrate Artificial Intelligence (AI), automation, and cloud-native capabilities into SCA solutions to gain market share.

Vendors continuously introduce new features and pricing models to attract enterprises, increasing market competition.

The increasing need for secure open-source management, Development Security Operations (DevSecOps) adoption, and regulatory compliance ensures room for multiple vendors to grow.

Some vendors specialize in specific industries such as healthcare, finance, etc., or offer integration with particular Development Operations (DevOps) tools, reducing direct head-to-head competition.

The SCA market is highly competitive, with continuous innovation, pricing pressure, and strong market players intensifying rivalry.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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