

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

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Report description:

SECaaS Market Analysis

The SECaaS market size stands at USD 14.07 billion in 2025 and is forecast to reach USD 32.59 billion by 2030, expanding at an 18.3% CAGR. Heightened board-level focus on cyber-resilience, the mainstreaming of consumption-based pricing, and the steady migration of workloads to public and hybrid clouds are steering procurement budgets toward cloud-delivered security controls. Organizations replacing appliance-centric defenses with converged Security Service Edge platforms find that the pay-as-you-go model keeps protection levels aligned with actual traffic volumes, a decisive advantage as edge locations proliferate. Demand accelerates further when remote-work policies and the proliferation of cloud-native applications bring identity, device, and API traffic under one policy framework. The SECaaS market now benefits from AI-infused analytics that shorten dwell time and provide full-stack observability, turning threat intelligence into automated, closed-loop response.

Global SECaaS Market Trends and Insights

Surging Cloud Adoption among SMEs and Enterprises

Growing cloud budgets channel directly into the SECaaS market as firms retire perimeter-centric technologies in favor of identity-first defenses. Public-cloud services in India are forecast to exceed USD 24.2 billion by 2028, with security services advancing the quickest at a 19% CAGR. Small and mid-size businesses gain enterprise-grade protection without dedicated SOC investments, accelerating vendor pipelines for multi-tenant platforms. Financial institutions illustrate the shift: 98% already

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consume at least one class of cloud service, and most now extend regulated workloads to third-party clouds under tightly governed access policies. Each new workload moved to the cloud automatically expands the attach rate for SECaaS subscriptions, creating a compounding revenue effect across the vendor landscape.

Rising Sophistication of Cyber Threats

Adversaries now wield AI-generated phishing, autonomous malware, and large-scale credential-stuffing campaigns that overwhelm signature-based tools. Banks have responded by embedding machine-learning analytics inside core SOC workflows, dedicating a growing share of multi-year cyber budgets to cloud-native threat detection engines. Healthcare providers, facing a 256% spike in hacking-related breaches, now stipulate SOC 2 and HIPAA alignment as entry requirements for any third-party service. The SECaaS market offers autonomy at scale: threat-intelligence feeds are centralized, detection models are continuously retrained, and automated response actions are orchestrated across global points of presence in seconds.

Data-Residency and Sovereignty Concerns

Cross-border data-flow restrictions challenge uniform cloud adoption. Europe's GDPR and impending Digital Operational Resilience Act compel many financial institutions to maintain customer data within regional boundaries, limiting the choice of global cloud locations. Multi-cloud strategies appear attractive, yet variations in sovereignty controls create fragmented security architectures that duplicate cost. While emerging sovereign-cloud offerings promise localized processing, enterprises remain cautious about potential vendor lock-in.

Other drivers and restraints analyzed in the detailed report include:

Shift to Remote-Work and BYOD Environments / Stringent Global Data-Protection Regulations / Multi-Vendor Subscription-Management Complexity /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Identity-and-Access Management remains the anchor of the SECaaS market, contributing 24.6% of 2024 revenue as cloud-first architectures elevate identity to the default control plane. The segment's enduring relevance reflects tighter least-privilege mandates and the explosion of third-party developer accounts. Advanced IAM suites now extend beyond workforce SSO to govern non-human identities generated by container orchestrators, elevating license counts and average revenue per user. Less visible yet faster moving, the Cloud Access Security Broker segment is growing at a 19.0% CAGR, fueled by the need to discover unsanctioned SaaS and enforce data-loss-prevention rules directly in SaaS-to-SaaS traffic. Combined, these solution pillars underpin the transition toward unified Security Service Edge offerings, where in-line inspection, access control, and data classification co-reside on a global edge fabric. Secure Email Gateway and Secure Web Gateway functions are migrating into these converged stacks, while next-generation SIEM refactors ingestion pipelines to exploit hyperscaler object-storage, thus slashing per-terabyte economics and removing deployment friction.

Second-generation vulnerability-management tools, embedded directly into CI/CD pipelines, close feedback loops between code, build, and runtime. This segue ties security posture tightly to developer workflows and allies the SECaaS market with the broader Platform Engineering movement. Vendors now package pre-approved IaC templates, policy-as-code libraries, and pipeline plugins so that risk visibility becomes intrinsic rather than bolted-on. The most effective sales narratives pivot on measurable MTTD reductions, dashboard-driven compliance, and the demonstrable ROI of consolidating five point solutions into one contract.

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Public-cloud deployments represented 59.8% of the 2024 SECaaS market as organizations capitalized on turnkey global points of presence and elastic scale. Nevertheless, hybrid-cloud adoption is posting a 19.8% CAGR as regulated entities weigh data-sovereignty mandates against latency and performance criteria. Enterprises now commonly place identity brokers and policy engines in public cloud while running inline decryption nodes on customer-managed infrastructure for sensitive workloads. Such architectural pluralism requires orchestration layers that can propagate policy once and enforce everywhere-capabilities that have become a differentiator in vendor bake-offs.

Private-cloud SECaaS instances persist for defense and critical-infrastructure operators who cannot expose traffic metadata to shared environments. Emerging industry blueprints allow controlled synchronization of indicators of compromise across trust domains without violating data-residency rules, an approach pioneered by industrial-control vendors working with national CERTs. Over the forecast horizon, multi-cloud policy automation will become table stakes, catalyzing alliances between cloud platforms and security vendors aimed at streamlining identity federation, key management, and telemetry normalization.

The SECaaS Market Report is Segmented by Solution (Identity and Access Management (IAM), Secure Email Gateway, and More), Deployment Model (Public Cloud, Private Cloud, and Hybrid Cloud), Organization Size (Large Enterprises and Small and Medium Enterprises (SMEs)), End-User Industry (BFSI, IT and Telecom, Healthcare and Life Sciences, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America retained 37.1% of global revenue in 2024, reflecting its concentration of hyperscalers, cybersecurity innovators, and early-adopter enterprises. Federal guidance from CISA urging the sunset of legacy VPN tunnels in favor of zero-trust, cloud-native access further cements demand. Financial institutions now mandate Security Service Edge controls during third-party due-diligence reviews, reinforcing network effects across supply chains. Canada and Mexico ride this momentum, integrating regional data-protection statutes with cross-border data flows to spur platform expansion.

Asia-Pacific is advancing at a 19.4% CAGR to 2030 as cloud-migration roadmaps underpin national digital-economy targets. India's public-cloud revenues already rank among the world's fastest-growing, and Australia's IRAP framework has opened government procurement channels for certified providers. Japan's telecom operators spearhead 5G edge rollouts, prompting industrial clients to pre-provision inline inspection to remote factories. Localized data regulations are diverse, but providers that can demonstrate consistent, region-aware encryption-key management gain a decisive bidding advantage.

Europe maintains robust demand, driven by GDPR and the emerging Digital Operational Resilience Act that obliges real-time control validation for financial entities. Germany and the United Kingdom lead investments in converged platforms that unify cloud access, email security, and data-loss prevention. France and Italy accelerate procurement through national cyber-resilience plans that allocate co-funding for SME adoption. Elsewhere, South America and the Middle East and Africa are earlier in their cloud journeys yet rapidly expanding internet backbones and regulatory frameworks, setting the stage for elevated SECaaS penetration rates as economic conditions stabilize.

List of Companies Covered in this Report:

Cisco Systems / Zscaler / Palo Alto Networks / Microsoft / Trend Micro / Barracuda Networks / IBM / Proofpoint / Sophos / Forcepoint / McAfee / Symantec (Broadcom) / Qualys / Check Point Software / Fortinet / Cloudflare / Okta / Akamai / Amazon Web Services / Google Cloud / CrowdStrike / Rapid7 /

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Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Surging cloud adoption among SMEs and enterprises

4.2.2 Rising sophistication of cyber threats

4.2.3 Shift to remote-work and BYOD environments

4.2.4 Stringent global data-protection regulations

4.2.5 API-driven "security-as-code" demand in DevSecOps

4.2.6 Rapid rollout of zero-trust Security Service Edge

4.3 Market Restraints

4.3.1 Data-residency and sovereignty concerns

4.3.2 Multi-vendor subscription-management complexity

4.3.3 Latency-sensitive workloads bypassing inline cloud security

4.3.4 Lack of usage-based billing standards

4.4 Value Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces Analysis

4.7.1 Bargaining Power of Suppliers

4.7.2 Bargaining Power of Buyers

4.7.3 Threat of New Entrants

4.7.4 Threat of Substitutes

4.7.5 Intensity of Competitive Rivalry

4.8 Investment Analysis

4.9 Assessment of the Impact of Macroeconomic Trends on the Market

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Solution

5.1.1 Identity and Access Management (IAM)

5.1.2 Secure Email Gateway

5.1.3 Secure Web Gateway

5.1.4 Cloud Access Security Broker (CASB)

5.1.5 Security Information and Event Management (SIEM)

5.1.6 Vulnerability Management

5.1.7 Other Solutions

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- 5.2 By Deployment Model
 - 5.2.1 Public Cloud
 - 5.2.2 Private Cloud
 - 5.2.3 Hybrid Cloud
- 5.3 By Organization Size
 - 5.3.1 Large Enterprises
 - 5.3.2 Small and Medium Enterprises (SMEs)
- 5.4 By End-User Industry
 - 5.4.1 BFSI
 - 5.4.2 IT and Telecom
 - 5.4.3 Healthcare and Life Sciences
 - 5.4.4 Government and Defense
 - 5.4.5 Retail and E-commerce
 - 5.4.6 Manufacturing
 - 5.4.7 Others
- 5.5 By Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.1.3 Mexico
 - 5.5.2 Europe
 - 5.5.2.1 Germany
 - 5.5.2.2 United Kingdom
 - 5.5.2.3 France
 - 5.5.2.4 Italy
 - 5.5.2.5 Spain
 - 5.5.2.6 Rest of Europe
 - 5.5.3 Asia-Pacific
 - 5.5.3.1 China
 - 5.5.3.2 Japan
 - 5.5.3.3 India
 - 5.5.3.4 South Korea
 - 5.5.3.5 Australia
 - 5.5.3.6 Rest of Asia-Pacific
 - 5.5.4 South America
 - 5.5.4.1 Brazil
 - 5.5.4.2 Argentina
 - 5.5.4.3 Rest of South America
 - 5.5.5 Middle East and Africa
 - 5.5.5.1 Middle East
 - 5.5.5.1.1 Saudi Arabia
 - 5.5.5.1.2 United Arab Emirates
 - 5.5.5.1.3 Turkey
 - 5.5.5.1.4 Rest of Middle East
 - 5.5.5.2 Africa
 - 5.5.5.2.1 South Africa
 - 5.5.5.2.2 Egypt

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5.5.5.2.3 Nigeria

5.5.5.2.4 Rest of Africa

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

6.4.1 Cisco Systems

6.4.2 Zscaler

6.4.3 Palo Alto Networks

6.4.4 Microsoft

6.4.5 Trend Micro

6.4.6 Barracuda Networks

6.4.7 IBM

6.4.8 Proofpoint

6.4.9 Sophos

6.4.10 Forcepoint

6.4.11 McAfee

6.4.12 Symantec (Broadcom)

6.4.13 Qualys

6.4.14 Check Point Software

6.4.15 Fortinet

6.4.16 Cloudflare

6.4.17 Okta

6.4.18 Akamai

6.4.19 Amazon Web Services

6.4.20 Google Cloud

6.4.21 CrowdStrike

6.4.22 Rapid7

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-Need Assessment

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