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United States Security Orchestration Automation and Response Market Assessment, By Component [Software, Services], By Application [Threat Intelligence & Vulnerability, Network Security, Incident Response, Compliance, Workflow Management, Others], By Organization Size [Large Enterprises, Small & Medium Enterprises], By End-user [IT & Telecom, BFSI, Retail, Healthcare, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

United States security orchestration automation and response market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years. With projected revenue of approximately USD 651.6 million in 2022, the market is anticipated to reach a value of USD 1871.83 million by 2030, displaying a robust CAGR of 14.1% from 2023 to 2030.

Security orchestration automation and response refers to a comprehensive set of techniques, procedures, and technologies to automate and optimize security operations. The fundamental objective of SOAR is to enhance the efficiency of seamless integration of a variety of security tools and technologies, automating repetitive tasks and providing incident response capabilities. SOAR solutions commonly comprehend threat intelligence, incident management, case tracking, workflow automation, comprehensive reporting, and analytics functionalities. These platforms harness the power of machine learning and artificial intelligence algorithms to promptly identify and address security issues in real-time while consistently enhancing their capabilities for detecting and mitigating threats.

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The growth of SOAR market is being driven by the increasing adoption of SOAR solutions by organizations of all sizes to automate security operations tasks, improve incident response time, and reduce the risk of data breaches. SOAR plays a vital role in enabling organizations to strengthen their security measures and mitigate cyberattack vulnerabilities. It empowers security experts to automate routine operations, enabling them to dedicate their expertise to tackling more sophisticated security issues.

Rising Cybersecurity Concerns to Propel the Market

With the proliferation of cyberattacks and data breaches, organizations seek advanced solutions to their security concerns. As cyber threats increase, organizations are compelled to seek advanced measures to safeguard their digital assets. SOAR emerges as a potent tool to counteract these concerns by offering streamlined automation and efficient incident response capabilities. The surge in cyber challenges is expected to function as a catalyst, propelling the adoption and integration of SOAR solutions across industries ensuring enhanced cyber resilience and proactive threat mitigation.

For example, in April 2023, Cisco revealed its most recent advancements in Cisco Security Cloud vision, an integrated and AI-driven security platform. The introduction of Cisco's latest XDR solution and enhanced functionalities for Duo MFA will bolster organizations' ability to safeguard the integrity of their complete IT environment.

Increasing Demand for Cloud-based Security Solutions

Cloud-based security solutions are becoming increasingly popular due to their scalability, flexibility, and cost-effectiveness. Cloud-based SOAR solutions are more cost-effective than on-premises solutions. It is due to the organizations which do not have to invest in hardware and software to deploy and manage a cloud-based SOAR solution. Cloud-based SOAR solutions are more secure than on-premises solutions as these solutions are hosted in secure data centers and are managed by security experts.

For example, in April 2023, IBM introduced a fresh security suite aimed at harmonizing and expediting the journey of security analysts throughout the complete incident cycle. IBM Security QRadar Suite is constructed upon an open framework, tailored to meet the requisites of the hybrid cloud environment. Distinguished by a unified and contemporary user interface across its entire range of products, the suite incorporates sophisticated artificial intelligence and automation capabilities, intended to empower analysts to

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operate with heightened speed, effectiveness, and accuracy across their primary set of tools.

Network Security Segment Holds the Largest Market Share

Network security in the context of SOAR typically involves orchestrating and automating security tasks and responses related to network threats and incidents. Network security has always been a critical area of concern for organizations, as it is a primary attack vector for cyber threats. Network security incidents like malware infections, intrusion attempts, and data breaches require swift and effective responses. SOAR solutions play a crucial role in automating and orchestrating these responses. SOAR solutions typically integrate seamlessly with network security tools and technologies, including firewalls, intrusion detection systems, and network monitoring solutions. The integration enhances network security by enabling real-time data sharing and automated responses.

For example, in March 2023, IBM and Cohesity joined forces in a new collaboration to address the critical requirement for enhanced data security and dependability in hybrid cloud environments. The forthcoming IBM Storage Defender is being crafted to leverage artificial intelligence and comprehensive event monitoring across diverse storage platforms, accessible through a unified interface. The initiative aims to bolster the protection of organizations' data infrastructure against threats, encompassing ransomware, human errors, and malicious attacks.

Government Initiatives

Government initiatives significantly shape the Security Orchestration Automation and Response (SOAR) market in the United States. These initiatives often focus on data security, privacy regulations, and standardization to build trust and confidence among businesses and consumers. Governments are investing in cloud infrastructure development, offering incentives, and creating supportive regulatory frameworks to encourage cloud adoption and stimulate innovation.

Government of the United States is collaborating with Costa Rica's authorities to bolster digital security and connectivity within the nation. The Department of State will supply a financial contribution of around USD 25 million to reinforce Costa Rica's cyber defense capabilities. The funding will encompass activities such as enhancing training operations and acquiring hardware and software for long-term capability. Moreover, the Cybersecurity and Infrastructure Security Agency (CISA) in the United States promotes

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using SOAR solutions to help organizations improve their security posture.

Impact of COVID-19

The COVID-19 pandemic significantly impacted various industries, including the cybersecurity sector and United States Security Orchestration Automation and Response (SOAR) market. The pandemic led to increased cyberattacks and security breaches as hackers exploited the uncertainties and vulnerabilities introduced by remote work environments and increased online activities. The heightened threat environment likely prompted organizations to seek more robust cybersecurity solutions including SOAR platforms. The pandemic accelerated digital transformation including various security measures in such a way that most of the organizations implemented security software to remote operations. The shift had led to an increased interest in SOAR platforms to manage the security complexities arising from rapid technology changes.

Impact of Russia-Ukraine War

The ongoing Russia-Ukraine war impacted the United States security orchestration automation and response (SOAR) market. The conflict had led to concerns about data privacy, security, and geopolitical instability, prompting businesses to re-evaluate their SOAR strategies. Organizations are becoming increasingly cautious about storing sensitive data in regions affected by the conflict, leading to a potential shift in SOAR service providers through cloud solutions for better control and risk management. Moreover, the war has disrupted internet connectivity in certain areas, affecting the reliability and accessibility of security cloud services. Additionally, geopolitical tensions have raised concerns about data sovereignty and compliance with international regulations. As a result, businesses focus on diversifying their SOAR infrastructure and exploring alternative markets to mitigate the risks associated with the Russia-Ukraine war, ensuring uninterrupted operations and data protection.

Key Players Landscape and Outlook

United States security orchestration automation and response market is witnessing a swift growth trajectory due to the increasing emphasis placed by companies worldwide on establishing advanced SOAR infrastructure. Furthermore, the market expansion is greatly facilitated by the establishment of proper cloud infrastructure, along with significant investments made by companies to enhance research and development resources, engage in collaboration projects, bolster marketing efforts, and expand

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distribution networks. These factors collectively contribute to the rapid expansion of the market.

In November 2022, Swimlane unveiled a Security Automation Ecosystem tailored for operational technology (OT) landscapes. By merging top-tier OT security capabilities with a versatile security automation platform, Swimlane established a resilient framework for managing security operations.

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