

Network Detection and Response Market by Offering (Solutions and Services), Network Environment (Enterprise IT Networks, Data Center & Cloud Networks, Industrial & OT Networks), Vertical (BFSI, Government, IT & ITeS) - Global Forecast to 2030

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Abstracts

The global NDR market size is projected to grow from USD 3.68 billion in 2025 to USD 5.82 billion by 2030 at a compound annual growth rate (CAGR) of 9.6% during the forecast period. The rising need to detect stealthy threats within encrypted traffic and east-west communications drives adoption. Organizations are increasingly deploying NDR platforms that leverage behavioral analytics, machine learning, and automated response to strengthen SOC efficiency, reduce dwell time, and ensure operational continuity.

However, a major restraint is the high cost and complexity of deployment, particularly for SMEs with limited budgets. Many enterprises struggle with talent shortages and the integration of NDR with existing SIEM, SOAR, and EDR tools, which slows adoption and increases operational overhead.

“Cloud segment is expected to record the highest CAGR during the forecast period”

The cloud deployment mode in the NDR market is projected to grow at the highest CAGR during the forecast period. Growth is driven by the increasing adoption of cloud-based infrastructure across industries, demand for scalable threat detection, and the cost efficiency of cloud-native NDR platforms. Cloud deployment enables organizations to enhance real-time visibility, manage distributed networks, and secure hybrid environments more effectively. The flexibility of subscription-based models and seamless integration with AI-powered analytics further accelerates adoption among

enterprises of all sizes.

“The open NDR software segment is projected to hold the largest market share”

The open NDR software segment is expected to account for the largest market share. Its dominance stems from the increasing adoption of open-source and customizable detection and response platforms, which provide greater flexibility and cost advantages. Open NDR solutions enable enterprises and service providers to tailor detection models, integrate with broader security stacks, and ensure transparency in threat analytics. The increasing use cases across academia, research, and enterprises, combined with strong in-house expertise, contribute to the expansion of this segment, thereby strengthening its role in the global NDR ecosystem.

“North America is expected to hold the largest market share”

North America is expected to continue dominating the NDR market, maintaining the largest share throughout the forecast period. The US, in particular, drives growth due to the presence of leading NDR solution providers, high adoption across BFSI, healthcare, government, and IT sectors, and strong regulatory frameworks. The region's early integration of AI-driven analytics, widespread cloud migration, and focus on protecting critical infrastructure make it a hub for NDR investments. Moreover, ongoing venture funding, cybersecurity mandates, and collaboration between public and private entities ensure sustained market leadership.

Breakdown of primaries

The study draws insights from a range of industry experts, including component suppliers, Tier 1 companies, and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 40%, Tier 2 – 35%, and Tier 3 – 25%

By Designation: C-level – 45%, Directors – 35%, and Managers – 20%

By Region: North America – 55%, Europe – 25%, Asia Pacific – 15%, RoW – 5%

The key players in the NDR market include Palo Alto Networks (US), Cisco (US), IBM (US), OpenText (Canada), HPE (US), Darktrace (UK), Rapid7 (US), Fortinet (US), NetScout (US), Sangfor (China), Stellar Cyber (US), ExtraHop (US), Vectra AI (US),

Arista Networks (US), IronNet (US), and others.

The study includes an in-depth competitive analysis of the key players in the NDR market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the NDR market and forecasts its size by offering into Solutions [Hardware (Network Sensors, Security Appliances, and Forensic & Storage Hardware) and Software (Native NDR Software and Open NDR Software) and Services [Professional Services (Consulting, Integration, and Implementation, Training & Education, and Support & Maintenance) and Managed Services], Network Environment [Enterprise IT Networks, Data Center & Cloud Networks, and Industrial & OT Networks], Organization Size [SMEs and Large Enterprises], Deployment Mode [Cloud, On-premises, and Hybrid]. The verticals covered in the NDR market include BFSI, Government, Healthcare & Life Sciences, Aerospace & Defense, Manufacturing, IT & Telecom, Retail & E-commerce, Energy & Utilities, Telecommunications, Transportation & Logistics, Media & Entertainment, and Other Verticals. By region, the market is segmented into North America, Europe, Asia Pacific, the Middle East & Africa, and Latin America.

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report will help market leaders and new entrants with information on the closest approximations of the revenue numbers for the overall NDR market and the subsegments. It will also help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

Analysis of key drivers (rising sophistication of cyber threats, regulatory and compliance mandates, digital transformation, and cloud adoption), restraints (high deployment and maintenance costs and shortage of skilled security

professionals), opportunities (integration with XDR platforms and AI-driven autonomous response), and challenges (data privacy concerns and scalability in high-speed networks)

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and product & service launches in the NDR market

Market Development: Comprehensive information about lucrative markets – analysis of the NDR market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the NDR market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Palo Alto Networks (US), Cisco (US), IBM (US), OpenText (Canada), HPE (US), Darktrace (UK), Rapid7 (US), Fortinet (US), NetScout (US), Sangfor (China), Stellar Cyber (US), ExtraHop (US), Vectra AI (US), Arista Networks (US), IronNet (US), Trellix (US), NetWitness (US), Sophos (UK), Corelight (US), Stamus Networks (US), Lumu Technologies (US), Logpoint (Denmark), ManageEngine (US), Verizon (US), Gatewatcher (France), ThreatBook (China), Gigamon (US), NIKSUN (US), Hillstone Networks (US), LinkShadow (US), Broadcom (US), Plixer (US), and Exeon (Switzerland).

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