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Security Service Edge (SSE) Market by Solution (Zero Trust Network Access (ZTNA), Secure Web Gateway (SWG), Cloud Access Security Broker (CASB), Firewall as a Service (FWaaS)) and Vertical (BFSI, Government, IT, Healthcare) - Global Forecast to 2030

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Abstracts

The global security service edge (SSE) market size is projected to grow from USD 6.08 billion in 2024 to USD 23.01 billion by 2030 at a Compound Annual Growth Rate (CAGR) of 24.8% during the forecast period. The integration of CASB within the security framework of the organization drives the growth of the SSE market because businesses want total insight and control over their cloud applications. With CASB, organizations can apply security policies, monitor the movement of data, and stop unauthorized access to meet regulations and enforce compliance in the cloud environment. Also, Zero Trust security is gaining traction in the SSEs, as enterprises abandon perimeter-based security models. Zero Trust reduces the risk of data breaches via identity verification, continuous inspection, and least-privilege access. Organizations are using SSE solutions that integrate CASB and Zero Trust for more security against the backdrop of evolving cyber threats. This is because such integration will provide more security across the distributed network and cloud applications.

'By vertical, the healthcare segment is expected to grow at the highest CAGR during the forecast period.'

Digital transformation in healthcare is accelerating demands for enterprise-grade SSE solutions. With the rise in the number of Electronic Health Records (EHRs), telemedicine, and cloud-based health applications, the attack surface has grown, putting data security at risk. The healthcare industry is expected to comply with laws and regulations such as HIPAA and GDPR. Hence, it is it difficult to protect sensitive

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information when also trying to comply with these regulations stringently. SSE solution integrates secure web gateway (SWG), cloud access security broker (CASB), and zero trust network access (ZTNA) to create a unified security framework in which the cloud and remote access to key systems are safeguarded. Hence, the rise of Remote Patient Monitoring and connected devices expands the cybersecurity threat landscape and necessitates real-time threat detection and response capability. Organizations in the healthcare sector also face increasing ransomware attacks and phishing attacks, thus forcing organizations into an advanced security architecture. This flexibility and scalability make it easy for healthcare providers to secure patient data across geographically dispersed locations, allowing secure access for medical professionals, administrative staff, and insurers. As the industry continues to embrace digital health solutions, the demand for SSE technologies will grow to ensure a compliant framework for protecting sensitive healthcare data.

By region, the Asia Pacific region is expected to grow at the highest CAGR during the forecast period.

The Asia Pacific region is expected to witness the highest growth in the SSE market owing to digital transformation, increase in cloud adoption, and rise in cyber-attacks. Investments in cloud infrastructure and cybersecurity are growing in countries like China, India, and Japan to supplement their development into a digital economy. The very diverse and large workforce of the region, along with a growing trend of the remote and hybrid work models, has seen the surge in demand for safe and secure access to cloud applications and enterprise networks. SSE solutions combine ZTNA, CASB, and SWG to form a scalable and cost-effective security infrastructure for businesses across different sectors: banking, healthcare, manufacturing, and government. Data protection regulations such as China’s Cybersecurity Law and India’s Personal Data Protection Bill have made companies more conscious of their respective security postures, hence encouraging them towards advanced SSE implementations. The increasing instances of cyberattacks confronting enterprises, critical infrastructures, and financial services are constructing the demand for SSE solutions. As businesses in this region continue prioritizing digital resilience, cloud security, and regulatory compliance, the SSE journey will see a fast ascent, which would qualify this region to be the fastest growth market for Security Service Edge solutions.

Breakdown of primaries

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

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

By Designation: C-Level Executives – 35%, Directors – 25%, Managers– 40%

By Region: North America – 30%, Europe – 35%, Asia Pacific – 25%, Middle East and Africa – 5%, Latin America – 5%

Major vendors in the global security service edge (SSE) market include Zscaler (US), Cisco (US), Broadcom (US), Palo Alto Networks (US), Netskope (US), Fortinet (US), Skyhigh Security (US), HPE Aruba Networks (US), iboss (US), Lookout (US), Cloudflare (US), Check Point (Israel), Open Systems (Switzerland), Forcepoint (US), Cato Networks (Israel), Citrix (US), Menlo Security (US), Versa Networks (US), Akamai (US), Juniper Networks (US), HCL Technologies (India), Nord Security (Netherlands), Trend Micro (Japan), Singtel (Singapore), Tata Communications Limited (India), SITA (Switzerland), Twingate (US), Banyan Security (US), and CrowdStrike (US).

The study includes an in-depth competitive analysis of the key players in the security service edge (SSE) market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the SSE market and forecasts its size by Offering (solution and service), by Solution (zero trust network access (ZTNA), secure web gateway (SWG), Cloud Access Security Broker (CASB), Firewall as a Service (FWaaS) and other solutions), by Service (professional services and managed SSE services), by Professional Service (implementation & integration, support & maintenance, consulting & advisory, and training & education), by Deployment Mode (cloud and hybrid), Organization Size (small and medium-sized enterprises, and large enterprises), Verticals (BFSI, government & public sector, retail & E-commerce, IT & ITeS, healthcare, education, manufacturing and others).

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

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The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall security service edge (SSE) market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better 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 on the following pointers:

Analysis of key drivers (widespread adoption of remote work, rising need for unified network security architecture, integration of Cloud Access Security Broker into organization’s security framework, rising demand for zero trust security, and compliance with stringent regulations, and data protection laws), restraints (complexities in integrating with existing infrastructure and lack of skilled professionals), opportunities (integration of AI and ML technologies with SSE solutions and cost savings by combining multiple security and network access), and challenges (network traffic aggregation & user experience and reforming security policies)

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the SSE market.

Market Development: Comprehensive information about lucrative markets – the report analyses the SSE market across varied regions.

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in SSE market strategies, including Zscaler (US), Cisco (US), Broadcom (US), Palo Alto Networks (US), and Netskope (US).

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