

eDiscovery Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Solutions, Service), By Organization Size (Small & Medium Enterprises (SMEs), Large Enterprises), By Deployment Mode (On-premises, Cloud), By Use Cases (Investigation, Litigation and Legal Operations, Early Case Assessment, Others), By Vertical (Healthcare & Life Science, Retail & Consumer Goods, Banking Financial Services & Insurance (BFSI), Legal, Energy & Utilities, Manufacturing, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global eDiscovery Market is projected to expand significantly, growing from USD 16.95 Billion in 2025 to USD 30.27 Billion by 2031, representing a CAGR of 10.15%. Electronic discovery entails the systematic identification, preservation, collection, and analysis of electronically stored information required for legal proceedings and investigations. This market growth is primarily fueled by the exponential increase in digital data volumes and the rising frequency of litigation and regulatory audits worldwide. These factors generate a continuous demand for efficient data processing solutions to ensure regulatory compliance and minimize legal risks. As noted by the 'Corporate Legal Operations Consortium' in '2025', '83 percent of legal departments expected the demand for legal services to increase', highlighting the intensifying necessity for effective discovery workflows.

However, a major obstacle to market expansion is the ongoing pressure of budgetary

limitations within legal departments. Organizations are subjecting legal spending to greater scrutiny, which restricts the funds available for external services and the advanced technology needed for complex data reviews. This financial austerity forces teams to cut expenditures, potentially delaying the wider implementation of comprehensive discovery solutions. Furthermore, the complexities associated with navigating international data privacy laws introduce friction into data transfer processes, adding further complications to the deployment of unified global platforms.

Market Driver

The increasing prevalence of global litigation and regulatory investigations serves as a primary driver for the Global eDiscovery Market, necessitating that organizations maintain robust data retrieval systems. As corporations grow internationally, they encounter intricate compliance mandates that require precise management of electronic evidence. This rise in legal activity directly leads to higher spending on discovery services to ensure process defensibility. According to the '2024 Annual Litigation Trends Survey' by Norton Rose Fulbright in January 2024, 61 percent of respondents were involved in at least one regulatory proceeding in 2023, a significant increase from the prior year. This trend creates substantial operational burdens; Pagefreezer reported in 2024 that 68 percent of respondents found heavier caseloads were delaying ESI production, emphasizing the critical need for scalable solutions.

Concurrently, the rapid integration of Generative AI and Machine Learning technologies is revolutionizing how legal teams handle these expanding datasets. Generative AI enhances efficiency in document review, enabling practitioners to identify relevant information much faster than traditional methods allow. This technological shift is crucial for alleviating bottlenecks caused by soaring data volumes. Consequently, adoption rates are rising; the '2024 Ediscovery Innovation Report' by Everlaw in September 2024 noted that 34 percent of respondents are currently using generative AI to streamline their workflows. This integration allows legal departments to control costs while satisfying the rigorous demands of modern litigation.

Market Challenge

The persistent pressure of budgetary constraints within legal departments constitutes a significant barrier to the growth of the Global eDiscovery Market. As organizations increasingly scrutinize overhead costs, legal teams are often forced to reduce spending, which directly limits their ability to invest in advanced discovery technologies and external professional services. This financial stringency compels departments to rely on

outdated or less efficient manual processes rather than adopting comprehensive electronic discovery platforms. As a result, service providers encounter heightened price sensitivity and extended procurement cycles, which effectively stalls revenue growth across the sector.

Highlighting this issue, the 'Association of Corporate Counsel' stated in '2024' that '42 percent of chief legal officers reported receiving a cost cutting mandate from their organizations'. This data underscores a widespread fiscal discipline that prioritizes immediate cost avoidance over efficiency gains. When legal leaders are required to shrink budgets despite rising litigation volumes, the capital necessary for upgrading to unified global platforms becomes unavailable, thereby dampening overall market momentum and the rate of innovation adoption.

Market Trends

The scope of discovery is expanding to include collaborative and ephemeral messaging platforms, reshaping collection strategies as legal teams move beyond traditional email reviews. Corporate reliance on communication tools such as Slack, Microsoft Teams, and WhatsApp compels eDiscovery workflows to adapt to dynamic conversation threads that do not fit standard document paradigms. This shift requires specialized connectors and processing capabilities to preserve context and metadata from fragmented chat histories, which are often unstructured and difficult to index. According to the '2025 State of the Industry Report' by eDiscovery Today in January 2025, 37.5 percent of respondents reported discovering mobile device data in most or all of their cases, highlighting the critical necessity for modernizing collection protocols to capture these non-traditional evidence sources.

Simultaneously, the convergence of eDiscovery and data privacy compliance workflows is gaining momentum as organizations integrate their legal and privacy operations to manage overlapping regulatory demands. Legal departments are increasingly utilizing eDiscovery platforms to handle Data Subject Access Requests (DSARs), leveraging existing indexing and review technologies to ensure consistent data governance across all channels. This integration allows firms to efficiently identify sensitive personal information, reducing the operational risks associated with maintaining separate privacy workflows. According to the '2025 Annual Litigation Trends Survey' by Norton Rose Fulbright in January 2025, 36 percent of respondents indicated that their organizations were more exposed to cybersecurity and data privacy disputes over the preceding year, driving the urgent adoption of unified frameworks that satisfy both litigation and regulatory compliance obligations.

Key Market Players

Microsoft Corporation

International Business Machines Corporation

DISCO, Inc.

OpenText Corporation

NextPoint, Inc.

KLDiscovery

Epiq Systems, Inc.

CloudNine

Relativity ODA LLC

Logik Systems, Inc.

Report Scope

In this report, the Global eDiscovery Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

eDiscovery Market, By Component

Solutions

Service

eDiscovery Market, By Organization Size

Small & Medium Enterprises (SMEs)

Large Enterprises

eDiscovery Market, By Deployment Mode

On-premises

Cloud

eDiscovery Market, By Use Cases

Investigation

Litigation and Legal Operations

Early Case Assessment

Others

eDiscovery Market, By Vertical

Healthcare & Life Science

Retail & Consumer Goods

Banking Financial Services & Insurance (BFSI)

Legal

Energy & Utilities

Manufacturing

Others

eDiscovery Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global eDiscovery Market.

Available Customizations:

Global eDiscovery Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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