

United States Software Market By Deployment Model (On-Premises Software, Cloud-Based Software, Hybrid Model), By License Model (Perpetual License, Subscription License), By Functionality (Enterprise Resource Planning, Customer Relationship Management, Security Software, Productivity Software, Operating Systems, Others), By End User (Small & Medium Enterprises, Large Enterprises, Individual Users), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

The United States Software Market was valued at USD 106.98 Billion in 2024 and is predicted to reach USD 173.30 Billion by 2030 with a CAGR of 8.21% during the forecast period. The United States software market stands as a dynamic and influential sector within the global economy, characterized by rapid innovation, substantial investment, and widespread adoption across various industries. As the birthplace of many technological advancements and home to numerous leading software companies, the U.S. continues to play a pivotal role in shaping the direction of the software industry worldwide. The market encompasses a diverse range of software solutions, including enterprise software, cloud computing, cybersecurity, artificial intelligence (AI), and software-as-a-service (SaaS), each contributing to the overall growth and evolution of the industry.

One of the key drivers of the U.S. software market is the robust demand for enterprise software solutions. Businesses across the country are increasingly investing in software

to streamline operations, enhance productivity, and gain a competitive edge. Enterprise resource planning (ERP) systems, customer relationship management (CRM) software, and supply chain management (SCM) solutions are among the most sought-after applications. These tools enable organizations to manage their resources efficiently, foster better customer relationships, and optimize their supply chains, ultimately leading to improved business outcomes.

The advent of cloud computing has revolutionized the software market, providing scalable, flexible, and cost-effective solutions for businesses of all sizes. Cloud-based software services, particularly SaaS, have gained significant traction due to their ease of deployment, lower upfront costs, and ability to support remote work environments. Major cloud service providers like Amazon Web Services (AWS), Microsoft Azure, and Google Cloud dominate the market, offering a wide array of cloud-based solutions that cater to the diverse needs of businesses. The shift to cloud computing has also spurred the development of new software applications and services, further driving market growth.

Cybersecurity has emerged as a critical concern for businesses and individuals alike, given the increasing frequency and sophistication of cyber threats. The U.S. software market has responded with a proliferation of cybersecurity solutions designed to protect data, networks, and systems from malicious attacks. These solutions range from antivirus and anti-malware software to advanced threat detection and response systems. Companies such as Palo Alto Networks, Symantec, and CrowdStrike are at the forefront of this sector, continually innovating to stay ahead of evolving cyber threats.

Key Market Drivers

Cloud Computing and SaaS Adoption

Cloud computing has fundamentally transformed the U.S. software market, driving significant growth and innovation. The adoption of Software-as-a-Service (SaaS) models allows businesses to access software applications over the internet on a subscription basis, reducing the need for costly on-premises infrastructure. This shift has democratized access to advanced software tools, enabling small and medium-sized enterprises (SMEs) to leverage the same technologies as large corporations. Major players like Amazon Web Services (AWS), Microsoft Azure, and Google Cloud dominate this space, offering scalable, flexible, and cost-effective solutions. The U.S. cloud infrastructure industry is projected to exceed USD100 billion by the end of 2025,

driven by significant investments from major companies like Amazon, Microsoft, and Google. This expansion supports the adoption of software that integrates with cloud platforms, further boosting the software market. The advantages of cloud computing include enhanced flexibility, automatic updates, and the ability to support remote work environments—an increasingly important feature in the post-pandemic landscape. Cloud computing facilitates the integration of various software solutions, enabling businesses to create more cohesive and efficient digital ecosystems. As more organizations migrate to the cloud, the demand for cloud-based software solutions is expected to continue its upward trajectory, driving significant market growth. Over 90% of U.S. enterprises report using cloud services, with 75% planning to expand their cloud investments. This shift underpins a surge in demand for cloud-native software applications.

Enterprise Software Solutions

Enterprise software solutions are a cornerstone of the U.S. software market, with businesses investing heavily in applications that streamline operations, enhance productivity, and provide a competitive edge. Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and Supply Chain Management (SCM) systems are among the most in-demand applications. These tools help organizations manage their resources effectively, improve customer relationships, and optimize supply chains, leading to better business outcomes. Companies such as SAP, Oracle, and Microsoft are leading providers of these solutions, constantly innovating to meet the evolving needs of businesses. The increasing complexity of business operations, driven by globalization and digital transformation, further fuels the demand for sophisticated enterprise software. The rise of data-driven decision-making necessitates robust data analytics and business intelligence tools, which are integral components of modern enterprise software suites. As businesses continue to seek efficiencies and competitive advantages, the market for enterprise software solutions is set to grow steadily. Due to the rise of remote and hybrid work models, the U.S. software market for collaboration and productivity tools is expected to grow by 18% annually, with cloud-based software solutions playing a key role in supporting these work environments.

Cybersecurity Concerns

With the increasing frequency and sophistication of cyber threats, cybersecurity has become a critical concern for businesses and individuals alike. The U.S. software market has responded robustly, with a proliferation of cybersecurity solutions designed to protect data, networks, and systems from malicious attacks. The cybersecurity landscape encompasses a wide range of products, from traditional antivirus software to

advanced threat detection and response systems. Leading companies like Palo Alto Networks, Symantec, and CrowdStrike are at the forefront of this sector, continuously innovating to stay ahead of cybercriminals. The growing adoption of cloud computing and the proliferation of IoT devices have expanded the attack surface, making robust cybersecurity measures even more essential. Regulatory requirements, such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA), also drive demand for comprehensive cybersecurity solutions. As cyber threats evolve and become more sophisticated, the need for advanced cybersecurity software will continue to drive significant growth in the market. U.S. organizations are expected to spend over USD20 billion on cybersecurity software by the end of 2025, driving significant growth in the cybersecurity segment of the software market as businesses prioritize data protection and threat mitigation.

Artificial Intelligence and Machine Learning

Artificial Intelligence (AI) and Machine Learning (ML) are transformative technologies driving substantial growth in the U.S. software market. AI-driven software applications are revolutionizing various industries by automating processes, enhancing decision-making, and providing deeper insights through data analytics. In healthcare, AI is used for predictive diagnostics and personalized treatment plans. In finance, it powers fraud detection and algorithmic trading. In retail, AI enhances customer experiences through personalized recommendations and inventory management. Companies like IBM, Google, and Microsoft are leading the charge in AI/ML innovation, offering platforms and tools that enable businesses to develop and deploy AI applications. The integration of AI/ML into software solutions provides significant competitive advantages, helping organizations improve efficiency, reduce costs, and unlock new revenue streams. As AI technology continues to advance, its applications will become even more widespread, driving ongoing growth in the software market.

Key Market Challenges

Cybersecurity Threats and Data Privacy Concerns

One of the foremost challenges facing the United States software market is the persistent and escalating threat of cybersecurity breaches and data privacy issues. As software becomes increasingly integral to business operations and daily life, the amount of sensitive data stored and processed by these systems grows exponentially. Cybercriminals are continuously developing more sophisticated methods to exploit vulnerabilities, leading to significant financial losses, reputational damage, and

regulatory penalties for businesses. The software industry must invest heavily in advanced cybersecurity measures to protect against these threats, including encryption, multi-factor authentication, and real-time threat detection. However, these investments come at a high cost and require constant updating and monitoring to remain effective against emerging threats. The regulatory landscape around data privacy is becoming more stringent, with laws such as the General Data Protection Regulation (GDPR) in Europe and the California Consumer Privacy Act (CCPA) in the United States imposing rigorous standards for data protection. Compliance with these regulations necessitates substantial resources and can pose operational challenges for software companies, especially those operating across multiple jurisdictions with varying legal requirements. Balancing robust cybersecurity measures with user privacy and regulatory compliance remains a complex and ongoing challenge for the U.S. software market.

Rapid Technological Advancements and Obsolescence

The rapid pace of technological advancements presents a significant challenge for the United States software market. Innovation cycles in the tech industry are becoming shorter, with new technologies and paradigms, such as artificial intelligence, machine learning, blockchain, and quantum computing, continually emerging. While these advancements create opportunities for developing cutting-edge software solutions, they also pose the risk of obsolescence for existing products and services. Software companies must constantly invest in research and development to stay ahead of the curve and ensure their offerings remain relevant and competitive. This relentless drive for innovation can strain resources, particularly for smaller firms and startups that may lack the financial and technical capabilities of larger corporations. Moreover, integrating new technologies into existing systems can be complex and time-consuming, often requiring significant changes to architecture and infrastructure. The need for continuous learning and upskilling of the workforce further adds to the challenge, as employees must keep pace with the latest developments to effectively design, develop, and support new software solutions. Navigating this fast-paced environment requires strategic planning, agility, and a commitment to innovation, making it one of the most daunting challenges in the U.S. software market.

Intense Market Competition and Consolidation

The United States software market is highly competitive, with numerous players ranging from established tech giants to innovative startups vying for market share. This intense competition drives rapid innovation but also creates significant challenges for companies trying to establish and maintain a foothold in the market. Established firms

such as Microsoft, Google, and Oracle dominate many segments with vast resources, extensive customer bases, and strong brand recognition, making it difficult for newer entrants to compete. The market is witnessing a trend towards consolidation, with larger companies frequently acquiring smaller firms to enhance their technological capabilities, expand their product portfolios, and enter new markets. While this consolidation can lead to more robust and comprehensive solutions, it also reduces the number of independent players in the market, potentially stifling innovation and reducing consumer choice. For startups and smaller firms, securing funding and achieving scale is increasingly challenging in such a competitive landscape. They must differentiate themselves through unique value propositions, superior technology, or niche market focus to survive and thrive. Balancing innovation with the pressures of competition and consolidation remains a significant hurdle for companies operating in the U.S. software market.

Talent Acquisition and Retention

The demand for skilled software developers, engineers, and other tech professionals continues to outstrip supply, posing a major challenge for the United States software market. Companies of all sizes are competing for top talent to drive innovation and maintain competitive advantage. This competition has led to a talent shortage, making it difficult for organizations to attract and retain the skilled workforce needed to develop and support cutting-edge software solutions. High salaries, comprehensive benefits packages, and attractive workplace cultures are often required to lure top talent, but these can be expensive and unsustainable for smaller firms. The rapid evolution of technology means that existing employees must continually update their skills to keep pace with industry developments. Providing ongoing training and professional development opportunities is essential but adds to operational costs. The shift towards remote work, accelerated by the COVID-19 pandemic, has broadened the talent pool but also introduced new challenges in managing distributed teams and maintaining productivity and cohesion. Companies must develop effective remote work policies and invest in collaboration tools to navigate this new landscape successfully. Addressing these talent-related challenges is critical for sustaining growth and innovation in the U.S. software market.

Key Market Trends

Rise of Artificial Intelligence and Machine Learning

The United States software market is witnessing a significant surge in the adoption of

Artificial Intelligence (AI) and Machine Learning (ML) technologies. AI and ML are transforming how businesses operate by automating routine tasks, enhancing decision-making processes, and providing valuable insights through advanced data analytics. In sectors such as healthcare, finance, and retail, AI-driven applications are revolutionizing operations. For instance, AI is being used to predict patient outcomes, detect fraudulent transactions, and deliver personalized shopping experiences. The integration of AI/ML into software solutions is not just limited to large enterprises; small and medium-sized businesses are also leveraging these technologies to gain competitive advantages. This widespread adoption is fueled by the availability of powerful AI tools and platforms from tech giants like Google, IBM, and Microsoft, which offer scalable solutions tailored to various industry needs. The continuous advancement in AI algorithms and the growing pool of AI talent in the U.S. are contributing to the rapid development and implementation of AI technologies across the software market. As businesses increasingly recognize the potential of AI to drive innovation and efficiency, the trend of AI/ML adoption in the U.S. software market is expected to grow exponentially.

Expansion of Cloud Computing

Cloud computing has become a cornerstone of the United States software market, offering scalable, flexible, and cost-effective solutions to businesses across all sectors. The shift from on-premises infrastructure to cloud-based services has accelerated significantly, driven by the need for enhanced operational efficiency, remote work capabilities, and cost management. Major cloud service providers like Amazon Web Services (AWS), Microsoft Azure, and Google Cloud continue to dominate the market, offering a wide array of services including Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS). The flexibility of cloud computing allows businesses to scale their IT resources according to demand, reducing the need for large capital expenditures on physical hardware. Moreover, cloud platforms are continually evolving, integrating advanced technologies such as AI, ML, and Internet of Things (IoT), which further drives their adoption. The COVID-19 pandemic has also underscored the importance of cloud computing, as businesses rapidly shifted to remote work environments, relying heavily on cloud-based collaboration and productivity tools. With the increasing demand for digital transformation and the need for resilient IT infrastructure, the expansion of cloud computing is poised to continue as a dominant trend in the U.S. software market.

Growth of Cybersecurity Solutions

As cyber threats become more sophisticated and frequent, the demand for robust

cybersecurity solutions in the United States software market is escalating. Organizations are increasingly investing in comprehensive cybersecurity measures to protect their data, networks, and systems from potential breaches and attacks. The proliferation of remote work, cloud computing, and IoT devices has expanded the attack surface, making cybersecurity a critical concern for businesses of all sizes. Leading companies like Palo Alto Networks, Symantec, and CrowdStrike are at the forefront of developing advanced cybersecurity solutions, including threat detection and response, endpoint protection, and network security. These solutions employ AI and ML to enhance their ability to detect and mitigate threats in real-time. Regulatory requirements such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) are driving organizations to adopt stringent cybersecurity practices. The increasing awareness of the financial and reputational risks associated with cyber incidents is also pushing businesses to prioritize cybersecurity investments. As cyber threats continue to evolve, the growth of cybersecurity solutions remains a critical trend, with ongoing innovation and investment shaping the future of the U.S. software market.

Proliferation of SaaS Applications

Software as a Service (SaaS) has transformed the software delivery model in the United States, providing businesses with easy access to a wide range of applications over the internet. The SaaS model offers numerous advantages, including reduced IT infrastructure costs, automatic updates, and the ability to scale services according to business needs. Companies like Salesforce, Adobe, and ServiceNow have become leaders in the SaaS space, delivering applications that address critical business functions such as customer relationship management (CRM), marketing automation, and IT service management. The convenience and flexibility of SaaS solutions have led to their widespread adoption among enterprises and small businesses alike. Moreover, the subscription-based pricing model of SaaS allows organizations to manage their budgets more effectively, paying only for the services they use. The integration capabilities of SaaS applications with existing systems further enhance their appeal, enabling seamless workflows and data synchronization. As businesses continue to seek ways to improve efficiency and agility, the proliferation of SaaS applications is expected to remain a prominent trend in the U.S. software market, driving innovation and growth across various industries.

Adoption of DevOps and Agile Methodologies

The adoption of DevOps and Agile methodologies is transforming software development practices in the United States, fostering a culture of collaboration, continuous

improvement, and rapid delivery. DevOps, a set of practices that combines software development (Dev) and IT operations (Ops), aims to shorten the development lifecycle and provide high-quality software through continuous integration, continuous delivery, and automation. Agile methodologies, on the other hand, focus on iterative development, allowing teams to respond to changes quickly and efficiently. Together, DevOps and Agile are enabling organizations to innovate faster and deliver value to their customers more effectively. The demand for these methodologies is driven by the need for faster time-to-market, improved product quality, and enhanced customer satisfaction. Companies are increasingly adopting DevOps tools and practices such as containerization, microservices, and infrastructure as code (IaC) to streamline their development processes. The rise of cloud-native applications and the need for scalability and flexibility are further propelling the adoption of DevOps and Agile. As businesses continue to embrace digital transformation and seek ways to stay competitive, the adoption of DevOps and Agile methodologies is set to remain a significant trend in the U.S. software market, shaping the future of software development and delivery.

Segmental Insights

Deployment Model Insights

On-Premises software segment dominated in the United States Software market in 2024. One of the primary reasons for the sustained preference for on-premises software is the heightened emphasis on data security and privacy. Many organizations, particularly those in highly regulated industries such as finance, healthcare, and government, prefer to keep their critical data within their own controlled environments. On-premises solutions provide these organizations with greater oversight and control over their data, allowing them to implement customized security measures and comply with stringent regulatory requirements more effectively. The ability to safeguard sensitive information from potential breaches and unauthorized access is a significant advantage that on-premises software offers.

Compliance with various regulatory frameworks is another critical factor influencing the dominance of on-premises software. Industries that handle sensitive data are often subject to strict regulations that mandate data residency and control. On-premises solutions enable organizations to adhere to these regulations by ensuring that data remains within their physical or virtual infrastructure, thus avoiding potential legal and compliance issues associated with storing data in third-party cloud environments.

Many organizations still operate legacy systems that are deeply integrated into their business processes. Transitioning these systems to the cloud can be complex, costly, and time-consuming. On-premises software allows these organizations to maintain their existing infrastructure while gradually modernizing their IT environment. This approach minimizes disruption to operations and ensures continuity, making it a more viable option for businesses with significant investments in legacy systems.

Regional Insights

Northeast dominated the United States Software market in 2024. The Northeast is home to several major technology hubs, most notably New York City and Boston. These cities are renowned for their robust tech ecosystems, characterized by a high concentration of tech companies, startups, and venture capital firms. New York City, often referred to as "Silicon Alley," has become a global center for tech innovation, particularly in fintech, media, and enterprise software. Similarly, Boston, with its proximity to world-class educational institutions, has emerged as a leader in biotech, AI, and cybersecurity. The presence of these tech hubs attracts a wealth of talent, investment, and business opportunities, propelling the software market forward.

The Northeast is home to some of the most prestigious universities and research institutions in the world, including Harvard, MIT, Columbia, and Princeton. These institutions are not only sources of cutting-edge research and development but also serve as pipelines for highly skilled graduates entering the tech workforce. The collaboration between academia and industry fosters innovation, leading to the creation of advanced software solutions and the establishment of numerous tech startups. The intellectual capital generated by these institutions significantly contributes to the region's dominance in the software market.

The Northeast boasts a thriving investment and venture capital ecosystem, essential for the growth of the software industry. New York City, in particular, is a global financial center with a significant concentration of venture capital firms, private equity investors, and financial institutions. These entities provide crucial funding and support for tech startups and established companies, enabling them to scale operations, innovate, and compete on a global stage. The availability of capital attracts entrepreneurs and fosters a dynamic environment where software companies can thrive.

The Northeast's software market benefits from its diverse industry base, which includes finance, healthcare, education, and media. Each of these sectors increasingly relies on sophisticated software solutions to enhance efficiency, improve services, and gain a

competitive edge. For instance, the finance industry in New York City drives demand for fintech solutions, while Boston's healthcare sector fuels the growth of healthtech and biotech software applications. This diversity ensures a steady demand for a wide range of software products, stimulating continuous growth and innovation.

Key Market Players

Microsoft Corporation

Apple Inc

Alphabet Inc.

Amazon Web Services, Inc.

Salesforce, Inc.

Oracle Corporation

IBM Corporation

Adobe, Inc.

Intuit Inc.

SAP SE

Report Scope:

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

United States Software Market, By Deployment Model:

On-Premises Software

Cloud-Based Software

Hybrid Model

United States Software Market, By License Model:

Perpetual License

Subscription License

United States Software Market, By Functionality:

Enterprise Resource Planning

Customer Relationship Management

Security Software

Productivity Software

Operating Systems

Others

United States Software Market, By End User:

Small & Medium Enterprises

Large Enterprises

Individual Users

United States Software Market, By Region:

Northeast

Southwest

West

Southeast

Midwest

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Software Market.

Available Customizations:

United States Software 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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