

IDC MarketScape: Worldwide Enterprise Hybrid Firewall 2025 Vendor Assessment

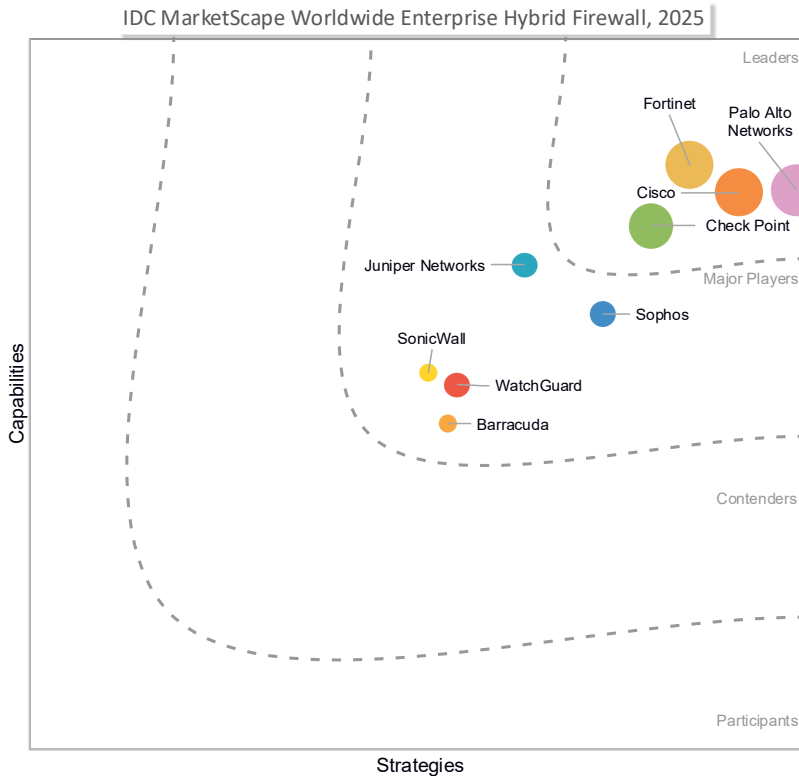
Pete Finalle

THIS EXCERPT FEATURES CISCO AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Enterprise Hybrid Firewall Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Enterprise Hybrid Firewall 2025 Vendor Assessment (Doc # US53687925).

IDC OPINION

The firewall market is a well-established network security market, which has a lineage spanning three decades, and is considered an essential component for enterprise security infrastructure. Firewalls offer a critical vantage point for visibility into network traffic and potential threats throughout the enterprise ecosystem and serve as an important security enforcement point on the network. This has given the firewall market strong staying power and a market presence totaling \$12.3 billion in 2024 according to IDC's latest tracker data.

However, the firewall market has not remained stagnant and has evolved from stateful inspection and packet filtering appliance to a Swiss Army Knife, which incorporates many network security products' functionality into one solution. Modern firewalls have reduced the number of security appliances/boxes required to be purchased and deployed and reduced the number of interfaces and complexities that security professionals are faced with managing.

Expanding from on-premises hardware, firewall operating systems have taken on a life of their own and are now ubiquitous across different deployment models and are deployed locally at the edge, in datacenters, and in the cloud. This has allowed hybrid firewalls to emerge as a panacea to the fragmentation of the enterprise perimeter, making them better suited for addressing the security needs of hybrid work and cloud resources and applications.

In 2025, this market continues to innovate. Hybrid firewalls are a center of gravity in the broader network security market, still serving as a Swiss Army Knife, but integrating broadly with other first-party and third-party tools and capabilities, including endpoint products, data security products, and SASE platforms.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC has identified the following key attributes that must be present in the solution to qualify for the inclusion in this IDC MarketScape analysis:

- Firewall solutions must be available in three of the four form factors: hardware/appliance, software/virtualized, as a service/SASE, and cloud native/containerized.
- There are no minimum inclusion requirements for additional firewall form factors, such as SD-WAN and smart networking, which act as an extension of the firewall platform. However, they may be considered in the final scoring.
- Next-generation firewall (NGFW) capabilities must be present in all firewall form factors to be considered, including IDS/IPS, antivirus/spam/bot, advanced threat protection, URL filtering, and VPN.

There are no minimum inclusion requirements for additional/optional components, although they may be considered in the scoring and often include SWG, ZTNA, inline CASB, sandboxing, IoT protection, SD-WAN functionality, and AI assistants.

First- and third-party integrations were considered in the scoring, but not essential for inclusion in this research.

Firewall revenue for CY23 was used as an inclusion threshold, determined by IDC, through existing research or existing data.

Significant regional presence in North America, Latin America, EMEA, and APAC was required for presence in this IDC MarketScape.

ADVICE FOR TECHNOLOGY BUYERS

Most Vendors Are a Safe Bet

Most vendors featured in this research have offered a firewall product for more than two decades and have refined their technology and approach to the market. Thus it is unsurprising that this research did not yield any results that positioned vendors in the "contenders" or "participants" categories. All vendors included in this research are capable of providing robust firewall capabilities.

However, this is not to say that there are no well-established swimming lanes among vendors, and that hybrid firewall solutions are all the same. The qualitative analysis in this IDC MarketScape outlines the strengths and weaknesses of each vendor and when they should be considered in an enterprise security setting. Thus while buyers can be assured that each firewall vendor provides a solid product, it is still important to choose the best product based on a strict set of requirements and desired security outcomes.

SASE Architecture Should Be Taken into Consideration

With the firewall role expanding far beyond the traditional appliance, buyers are increasingly tethered to their vendor of choice and should consider the larger ecosystem that their hybrid firewall has first-party integrations with. In particular, hybrid firewall platforms share strong integrations with their vendor's SASE solution and often utilize the same interface/console, management plane, policy engine, and operating system. Thus modern hybrid firewall purchasing decisions should take into account the needs of today as well as the medium-term to long-term SASE road map with future security goals and milestones in mind.

Flexibility Is Important

Return on investment (ROI) is still king when it comes to large purchasing decisions. However, every security technology is worth more viewed within the context of its broader first-party ecosystem, which can complicate the ROI calculation. In addition, with quantum computing and AI altering the threat landscape, it can be complicated, if not impossible, to second guess tomorrow's security requirements. Thus vendors that provide flexible payment options and the ability to shift security investments as requirements evolve can be invaluable when faced with the volatile nature of the growing landscape. Vendor lock-in is inevitable with large infrastructure-related purchases, but product lock-in should not influence a buyer's ability to respond to threats.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Cisco

Cisco is positioned as a Leader in this 2025 IDC MarketScape for enterprise hybrid firewall vendor assessment.

Cisco is a long-standing conglomerate with strong roots in telecommunications, networking, and security, shaping a strong portfolio for adhering to the latest trends of merging security and networking.

Strengths

Cisco's hybrid firewall platform excels not only at network security but at extending security throughout the network as strong integration points between firewall and

traditional network components, such as smart switches and routers, as well as agent and agentless segmentation capabilities give Cisco's platform extended reach inside the network. This can be extremely valuable for buyers who purchase both networking and security from Cisco, expanding visibility and enforcement points.

In addition to the strong integrations throughout its broad first-party platform, Cisco was evaluated as having a high number of significant third-party native and API-based integrations. This adds to the flexibility and extended capabilities available to its hybrid firewall platform, benefiting customers with entrenched third-party tools and solutions.

Cisco also performs extremely well on hybrid firewall functionality, with policy management capabilities averaging customers a significant decrease in the number of firewall policies that must be created and maintained. In addition, Cisco offers over 50 data tables and 15 statistical categories for logging and reporting. These types of functional capabilities can make firewall ownership more streamlined and efficient and cut down on the burden faced by security personnel.

Challenges

Cisco lacks some additional hardware feature integration, which can be a benefit to smaller businesses/smaller offices, branch offices, and OT. These typically include options for an integrated landline modem, cellular modem, SATCOM support, and Wi-Fi radio. Although these capabilities can be added externally, the lack of an option for an all-in-one box is noteworthy.

Consider Cisco When

Cisco offers substantial benefits for buyers who opt to adopt both networking and security components from the company, gaining increased protections and efficacy throughout their environment. In addition, Cisco excels at extended integrations throughout its broader security platform and with numerous third parties, which crafts a security story that is "better together," functioning well beyond the capabilities inherent in standalone components.

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC notes that the graphic provides a visual representation of several factors that are translated into a positioning along each axis. Existing product-specific features and functionality are important components of the "capabilities" axis, but many more factors are considered as well. Similarly, the "strategies" axis heavily considers the vendor's plans for future product developments. However, several factors are also considered, including the strength of the overall business and go-to-market plans. Pricing and ROI were taken into account for both axes. These factors may have a long-term impact on the solution, and IDC has adjusted the weights of these criteria accordingly. Overall, several factors go into each vendor assessment, and readers are advised to consider the graphic in the context provided in the vendor profiles.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the

vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

At their most basic, firewalls are created to filter network traffic through packet filtering, stateful inspection, and/or proxy. Firewalls also integrate many security functions in one device. The solution must provide the ability to perform network firewalling, application and user identity visibility and control, network intrusion detection and prevention, gateway antivirus (AV), virtual private networks, and other more advanced security functions. All of the capabilities need not be utilized, but the functions must exist inherently in the product.

Hybrid firewalls are full-featured firewall platforms that extend seamlessly across multiple deployment models, including hardware/appliances, virtualized/software, firewall as a service or part of a SASE, and cloud-native firewall/containerized firewall. Hybrid firewall platforms should have consolidated interfaces, management plane, and policy engine. These platforms should be able to be managed centrally, and policies should have some level of portability.

LEARN MORE

Related Research

- *IDC Market Glance: Zero Trust Architecture, 2Q25* (IDC #US53615125, June 2025)
- *Does SASE/SSE Solution Really Improve Security Posture?* (IDC #US53566325, June 2025)
- *Does SASE/SSE Solution Really Improve Network Performance?* (IDC #US53566525, June 2025)
- *How Have Key Metrics Changed Since Adopting or Planning to Adopt an SSE Solution?* (IDC #US53566425, June 2025)
- *RSAC Conference 2025: Agentic AI and a Continued Move Toward Integration Emerge as Key Themes* (IDC #US53463525, May 2025)
- *Secure Access Service Edge (SASE): Network and Security Convergence for the Hyper-Distributed Enterprise* (IDC #US53328325, May 2025)
- *Security Vendors Prioritized by the Channel for Line Card Expansion* (IDC #US53328925, April 2025)
- *Broader SASE Platforms Can Be Vast, But What Is the Buyer Appetite for Consuming Them as Intended?* (IDC #US53254825, March 2025)

- *How Have the Largest SSE/SASE Adoption Challenges from 2024 Changed in 2025?* (IDC #US53254725, March 2025)
- *How Much Demand Among SSE/SASE Buyers Is There for Integrating Data Loss Prevention into Their Broader Platform?* (IDC #US53254625, March 2025)

Synopsis

This IDC study evaluates vendors in the enterprise hybrid firewall market. The 2025 hybrid firewall market comprises long-standing firewall vendors that have had decades to refine their offerings and perfect their technologies. However, the enterprise buyer is a moving target, and a fragmented perimeter, volatile threat landscape, and universal need to consolidate and simplify security tools have pushed this \$12.3 billion established market to reinvent itself and reinvigorate competition. Thus this 2025 research found new and unique features and capabilities, including new AI assistants, new ASICs and improved performance, policy transition tools for firewall migration, support for cloud vendor firewall integration, firewall scaling technologies, preconfigured/zero trust firewall deployment options, flexible pricing models, and unique integrations with other security tools and capabilities.

While packet filtering, stateful inspection, and/or proxy are still at the core of the firewall, these products have pulled in so many advanced features and capabilities that choosing a firewall vendor is often synonymous with choosing a partner for all of your network security needs.

"The enterprise hybrid firewall market is an established market, which is evolving to meet rapidly changing buyer requirements so quickly that new features and capability advancements are keeping a pace similar to new/emerging markets," says Pete Finalle, research manager for IDC's Security and Trust team.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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