

2025 Market Share Leader Award

Hybrid Mesh Firewall Market

Presented by:

Dell'Oro Group



About Dell'Oro Market Share Leader Award



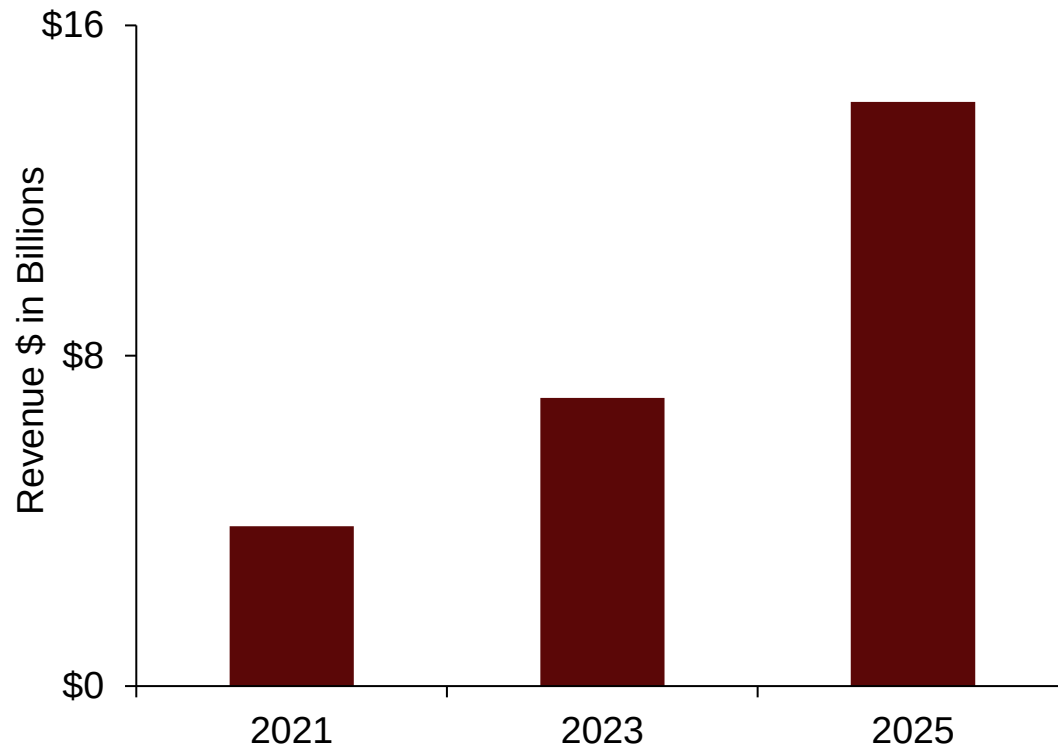
Dell'Oro tracks market size and share on a quarterly basis for most product categories in telecom, enterprise security and networking, data center IT.

Using objective data and a proven and respected methodology, Dell'Oro Group identifies the leading supplier by total annual revenue in specific product categories.

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Hybrid Mesh Firewall (HMFV) Market 2025



- › HMFV Platform revenue grew 34% Y/Y in 2025, exceeding \$14 B
- › Enterprises increasingly favored common policy, shared telemetry, and cloud-delivered operations
- › Distributed enforcement expanded across firewalls, SD-WAN, cloud, and FWaaS nodes

Hybrid Mesh Firewall Revenue Ranking 2025

Hybrid Mesh Firewall Market Share Leader 2025

Global



Rank #1

Cisco



Rank #2

Palo Alto Networks



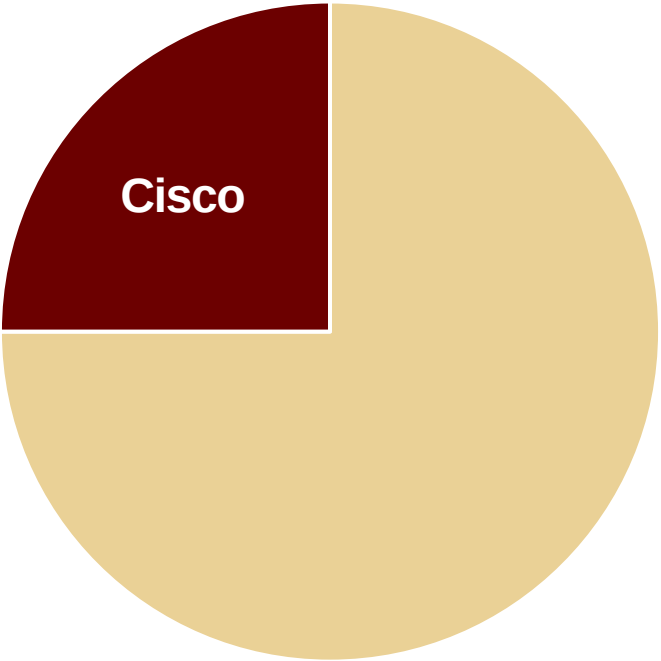
Rank #3

Fortinet



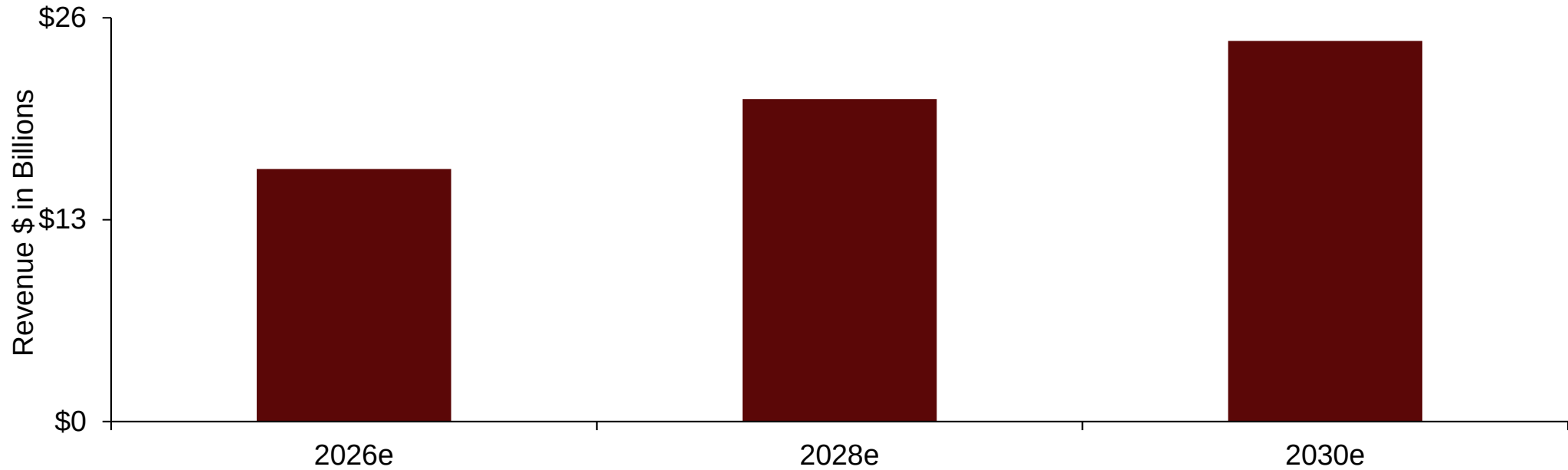
Rank #4

Check Point



Cisco led the Hybrid Mesh Firewall market in 2025 with a 25% market share.

Hybrid Mesh Firewall Market Forecast



- › Market forecast to exceed \$24 B by 2030
- › 5-year CAGR (2025-2030) of 12%
- › Firewall remains the spending anchor as SD-WAN with firewall becomes a second growth engine
- › Unified policy, telemetry, and cloud management sustain platform adoption

About Dell'Oro Group



- › Founded in 1995 and headquartered in Silicon Valley.
- › Boutique research firm specializing in telecommunications, enterprise security and networking, data center IT.
- › Quarterly Reports on market share, market size, and pricing, by macro region of the world.
- › 5-Year Forecast Reports, analyst judgment on technology trends, market size tables with history and forecast.
- › Industry executives, investors, and government agencies use our data for critical decision-making.
- › Earned the reputation as the “Gold Standard”.



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