2024 Market Share Leader Award

Overall Application Security and Delivery
Application Delivery Controller

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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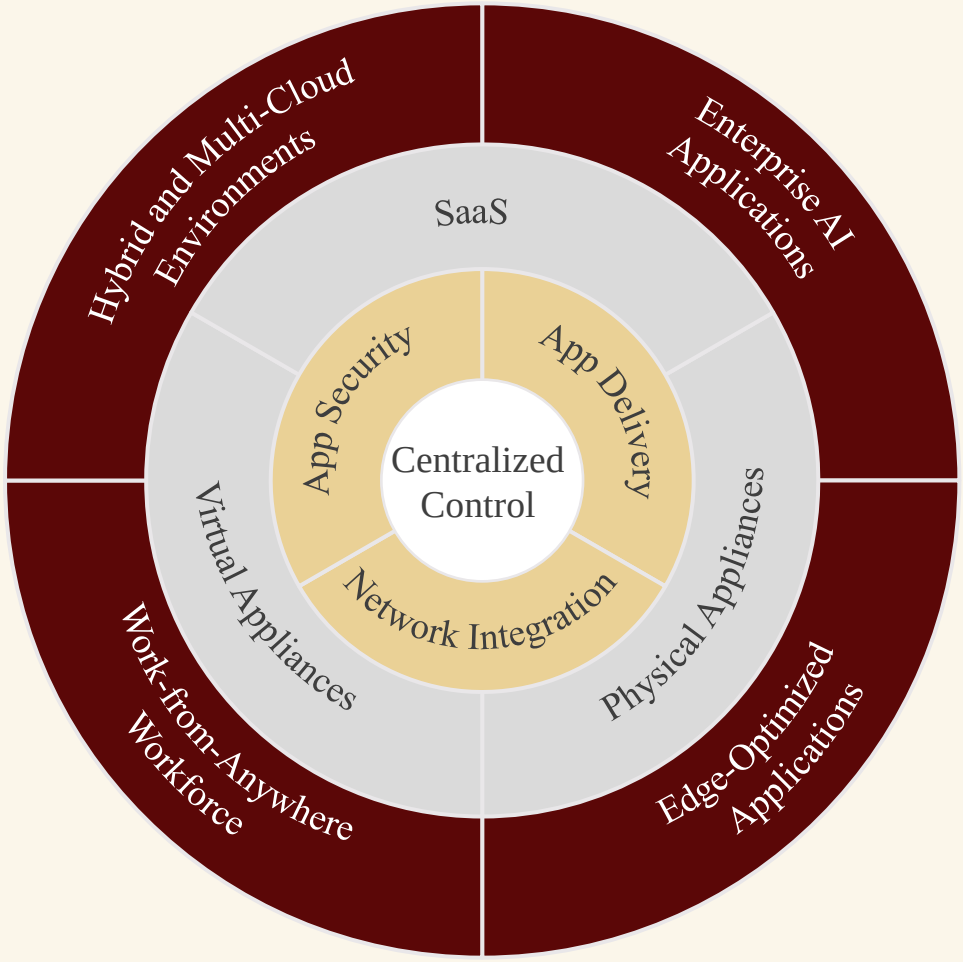
Integrated Application and Security Architecture



Enterprise use cases steering security and delivery requirements

Deployment flexibility across any cloud or site

Integrated security-delivery accelerates and protects every application

Centralized control enforces uniform policy and simplifies operations

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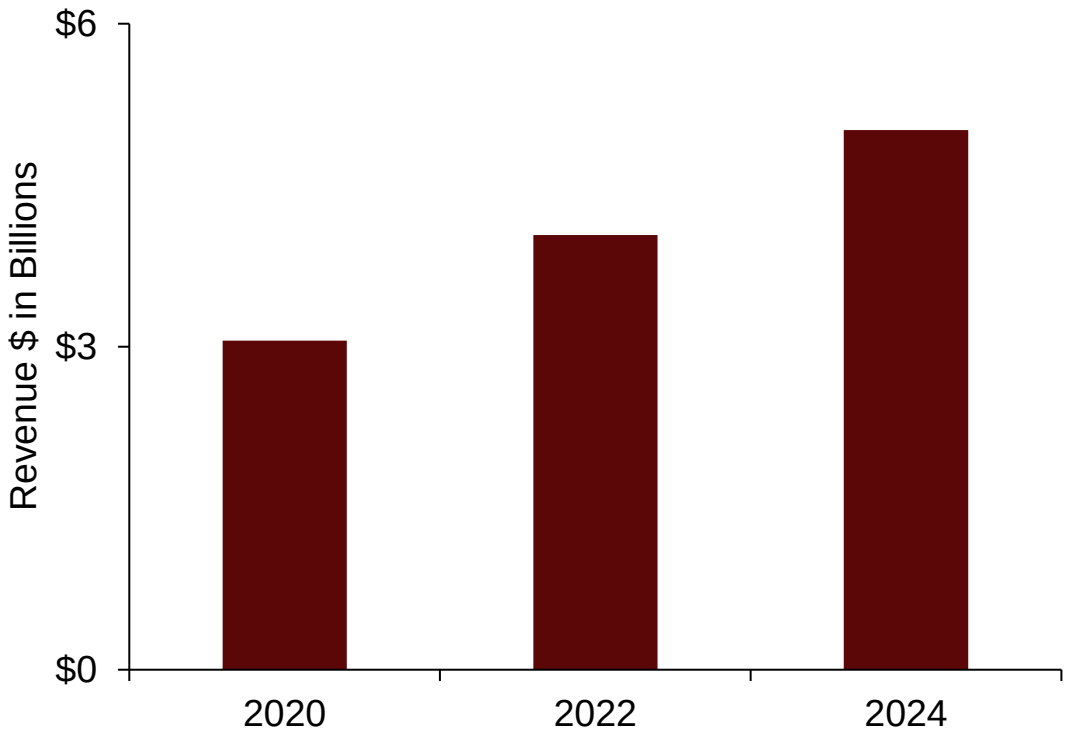
Overall Application Security & Delivery Market 2024



- App Sec & Delivery combines WAF security and ADC delivery technology segments
- App Sec & Delivery revenue grew 15% in 2024
- Security (WAF) revenue up 19% in 2024
- Delivery (ADC) revenue rebounded 8% in 2024

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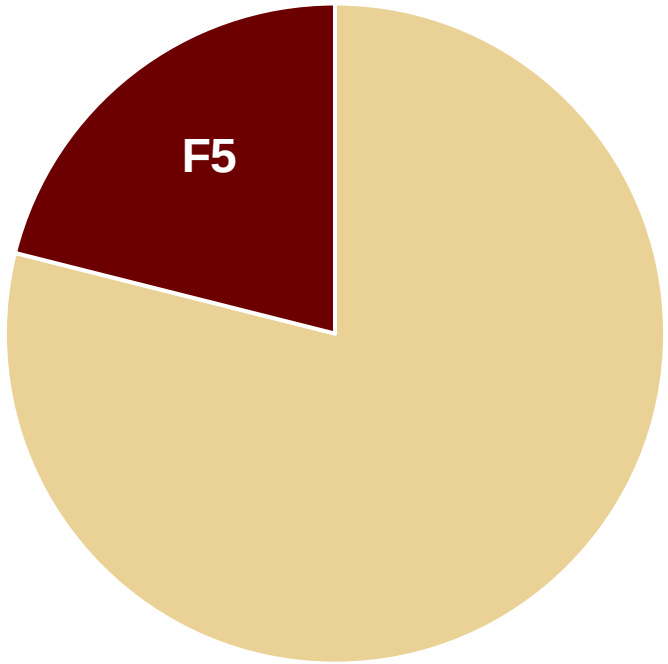
Overall Application Security and Delivery Revenue Ranking 2024

	Global
Rank #1	F5, Inc.
Rank #2	Akamai
Rank #3	Cloudflare
Rank #4	NetScaler/Citrix

Overall Application Security and Delivery Market Share Leader 2024



F5 led the Overall Application Security & Delivery market in 2024 with 21% market share

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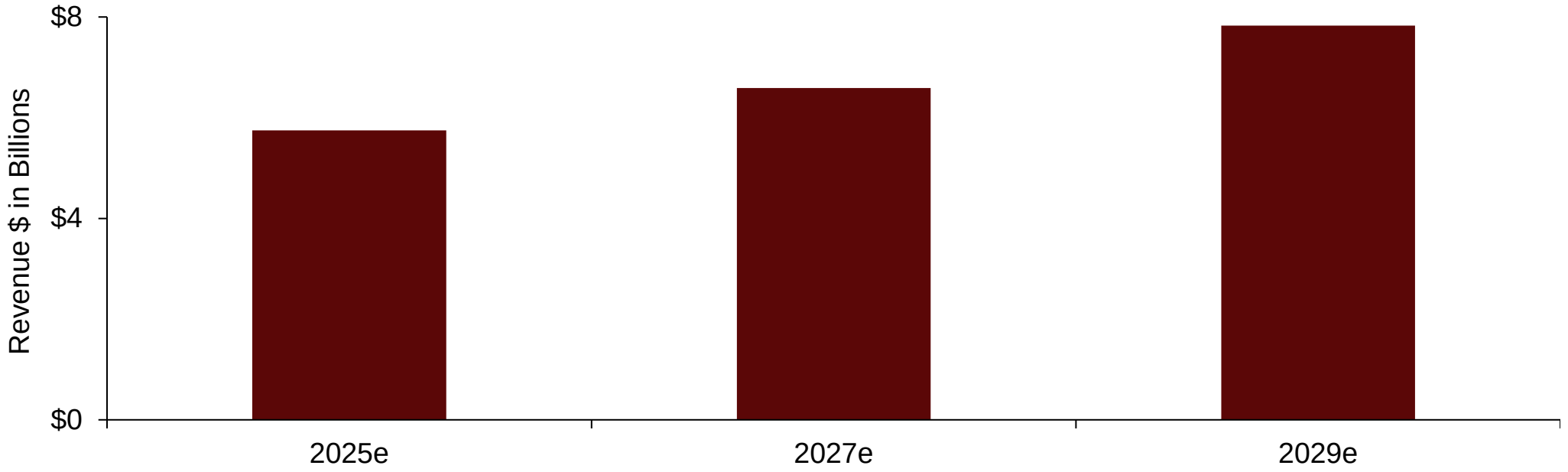
Overall Application Security and Delivery Market Forecast



- Market to reach nearly $8 B by 2029, representing a 10% revenue CAGR
- Hybrid, multi-cloud architectures boost need for scalable solutions
- Enterprise AI applications require agile and secure solutions
- SaaS, virtual, and physical form factors remain vital for deployment flexibility

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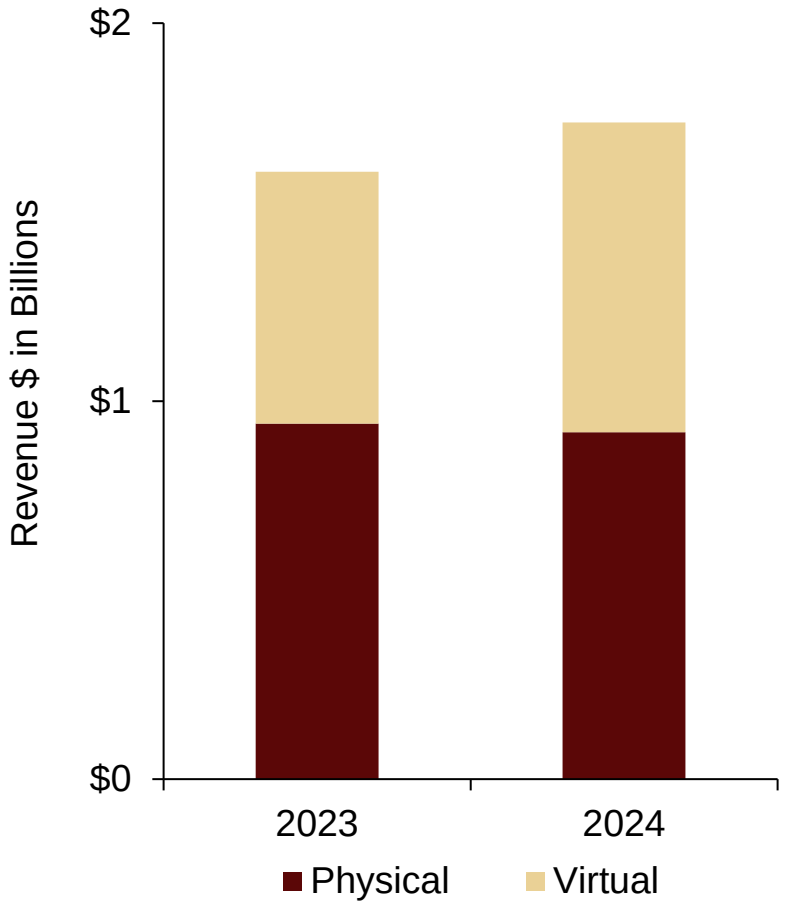
Application Delivery Controller (ADC) Market 2024

ADC revenue up 8% in 2024 due to role in mission-critical apps requiring high availability and performance.

Hybrid and multi-cloud architectures fueled 23% rise in virtual ADC revenue.

ADC hardware remained essential for ultra-low-latency, high-throughput workloads.



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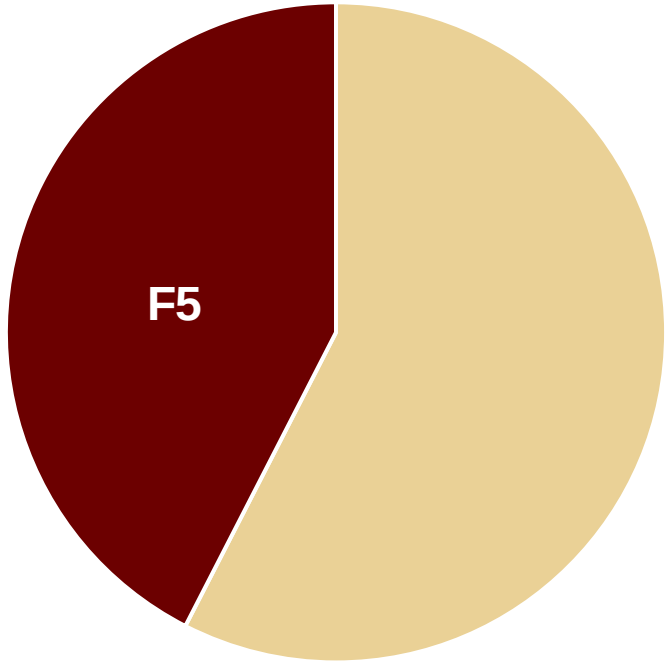
Application Delivery Controller Revenue Ranking 2024

Global	
Rank #1	F5, Inc.
Rank #2	NetScaler/Citrix
Rank #3	A10 Networks

Application Delivery Controller Market Share Leader 2024



F5 led the Application Delivery Controller market in 2024 with 42% market share

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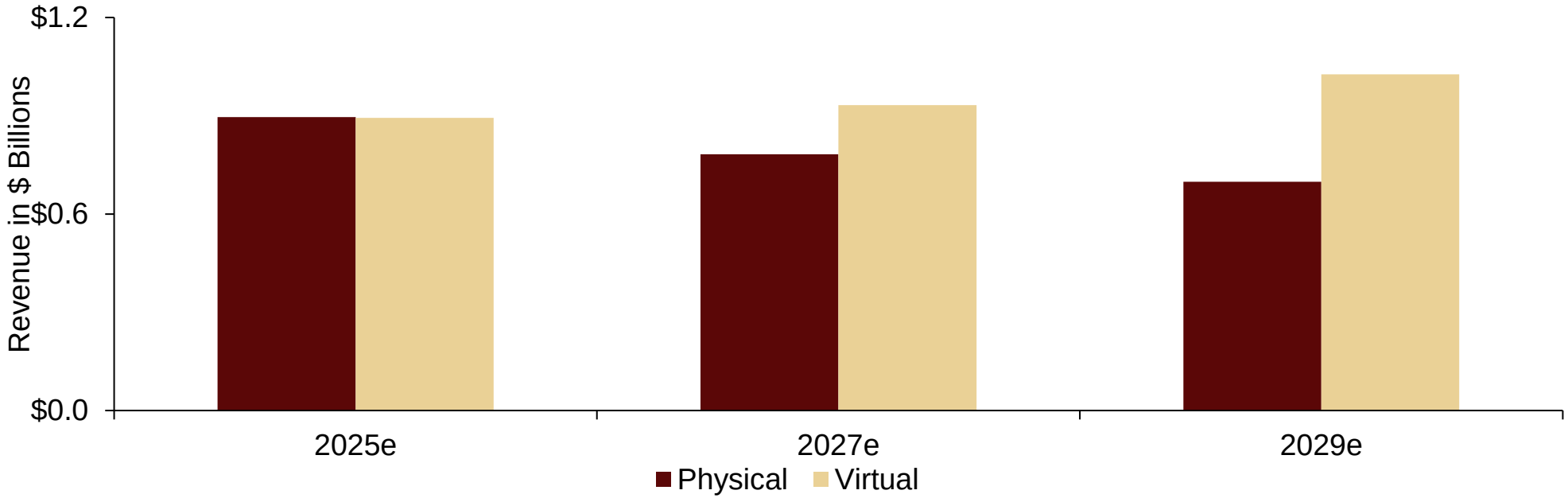
Application Delivery Controller Market Forecast



- Virtual ADCs rising to support cloud-centric app architectures
- AI apps demand low-latency, high-performance ADCs
- Cloud repatriation renewing interest in hybrid on-prem ADC
- ADC hardware to remain relevant for performance and deployment agility

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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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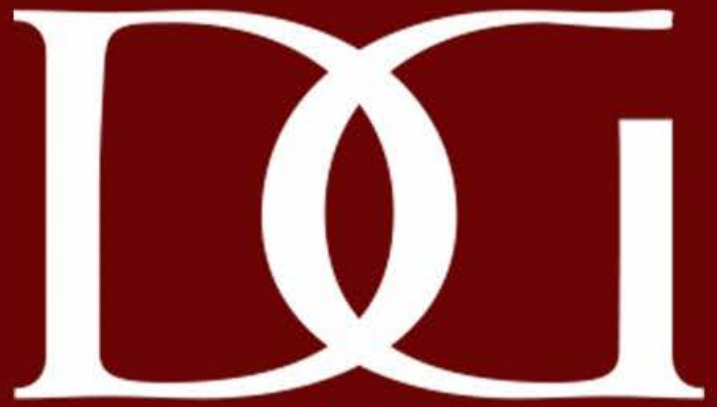

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