

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



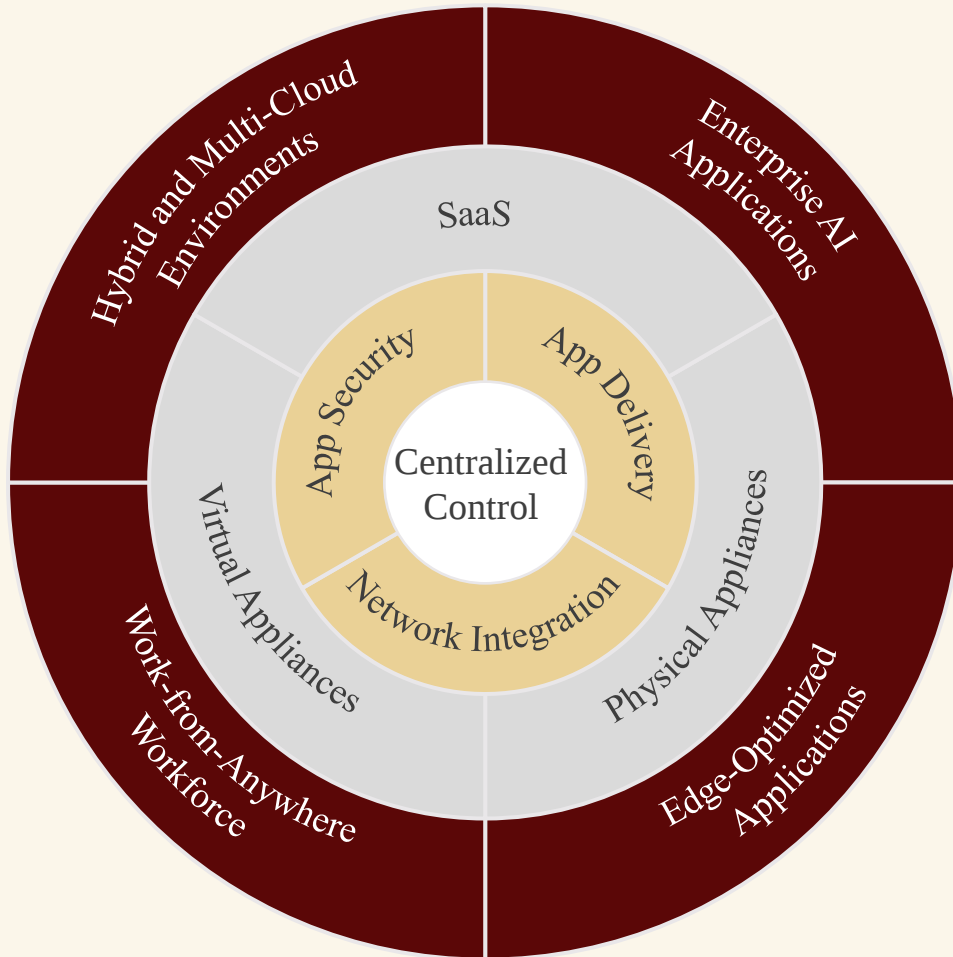
Dell'Oro tracks market size and share on a quarterly basis for most product categories in telecom, enterprise security and networking, data center IT.

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



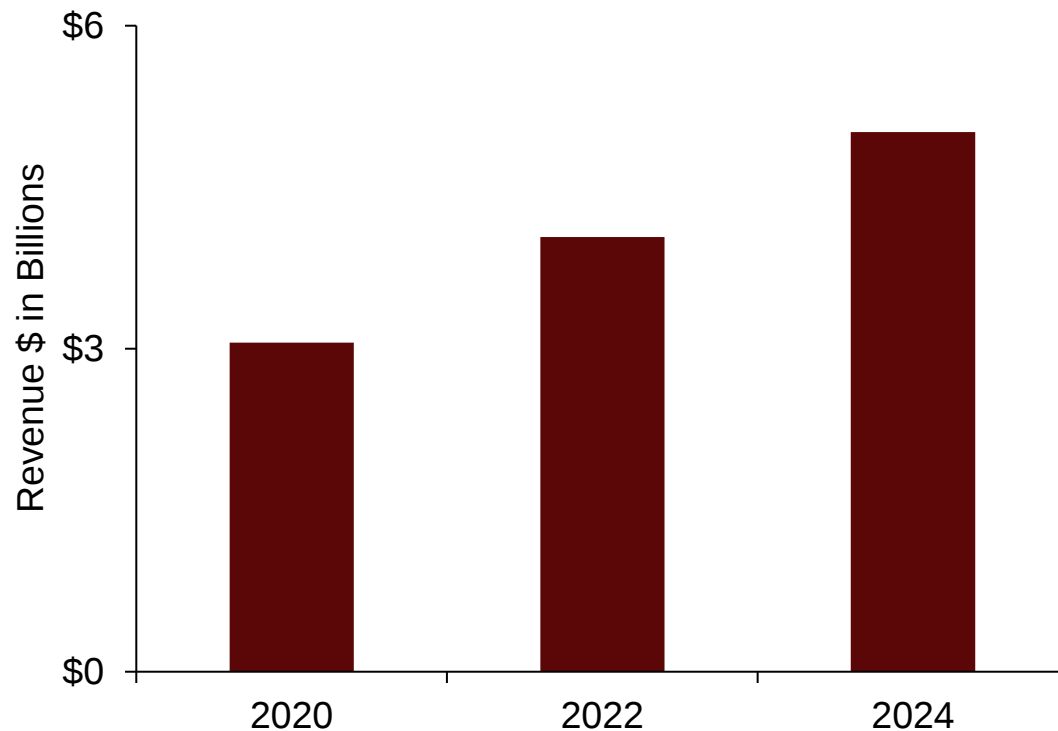
Enterprise use cases steering security and delivery requirements

Deployment flexibility across any cloud or site

Integrated security-delivery accelerates and protects every application

Centralized control enforces uniform policy and simplifies operations

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

Overall Application Security and Delivery Revenue Ranking 2024



Rank #1 F5, Inc.



Rank #2 Akamai

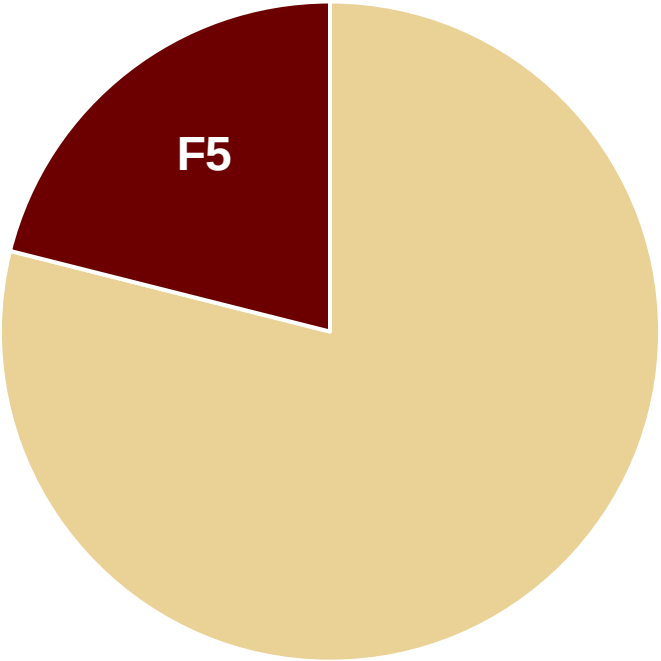


Rank #3 Cloudflare



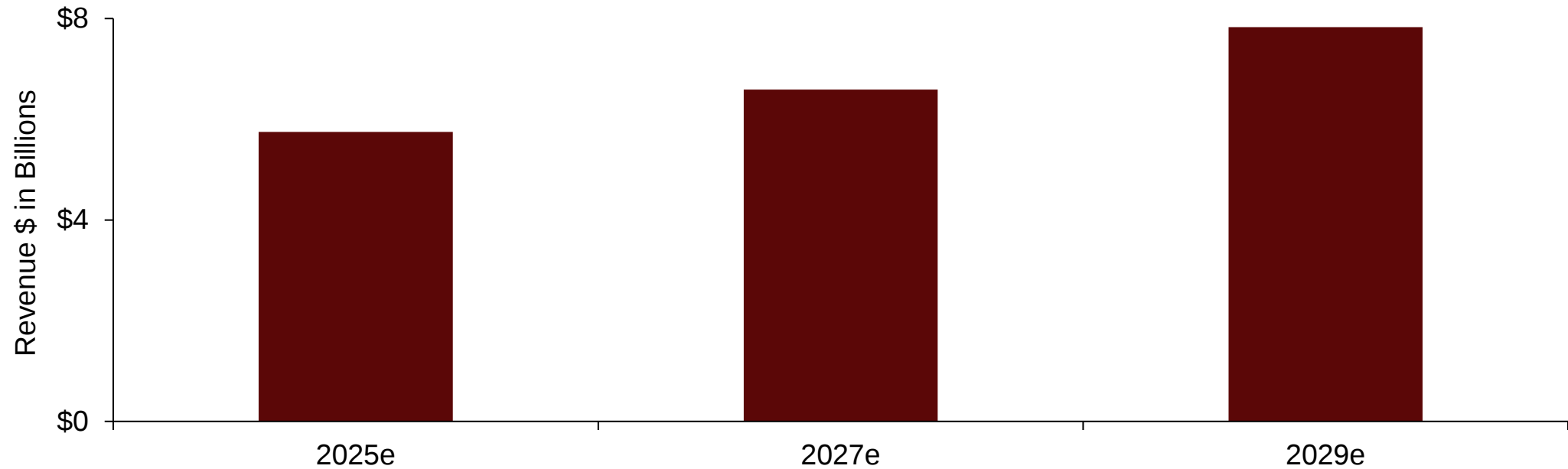
Rank #4 NetScaler/Citrix

Overall Application Security and Delivery Market Share Leader 2024



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

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

Application Delivery Controller (ADC) Market 2024



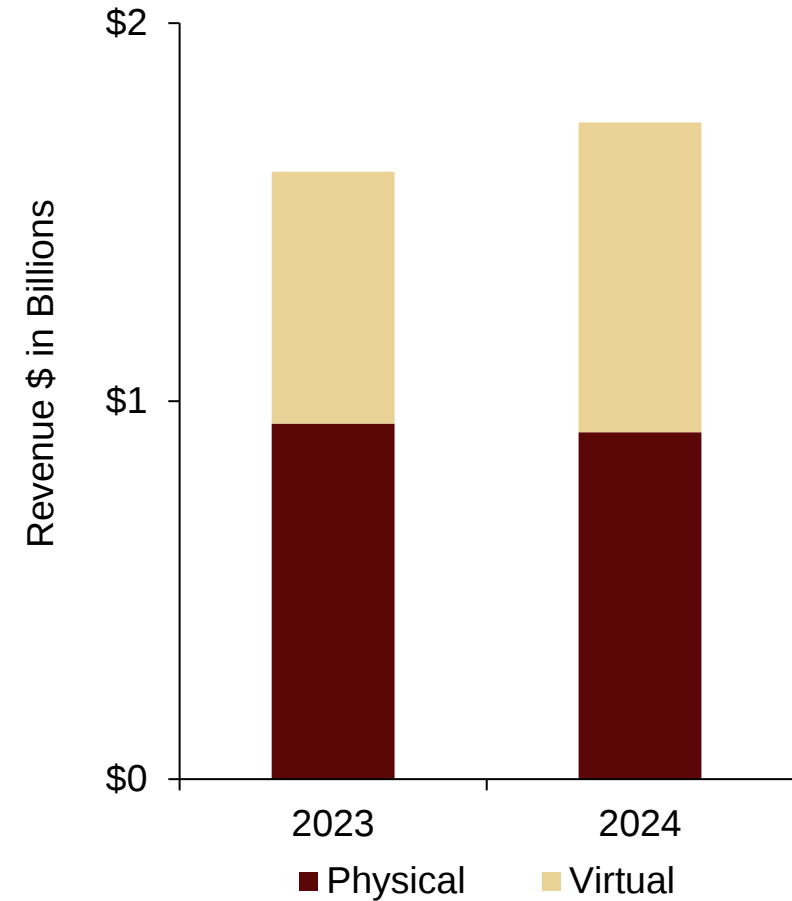
ADC revenue up 8% in 2024 due to role in mission-critical apps requiring high availability and performance.



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



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



Application Delivery Controller Revenue Ranking 2024



Rank #1

F5, Inc.



Rank #2

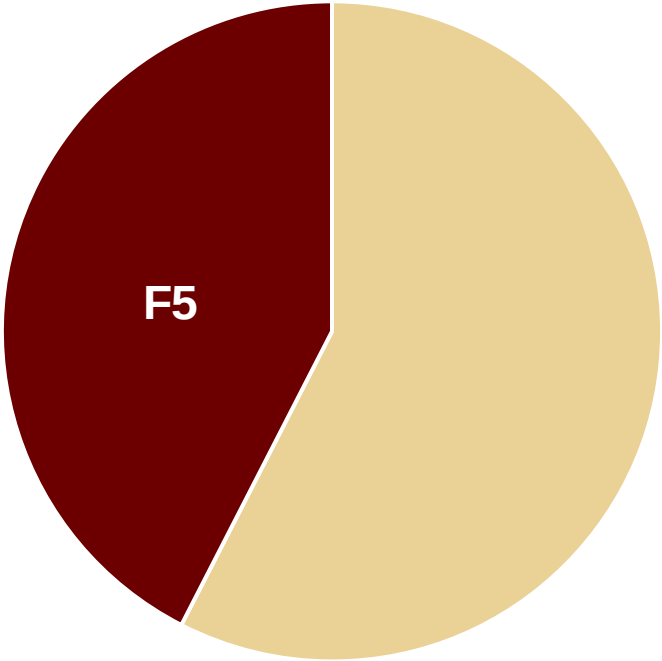
NetScaler/Citrix



Rank #3

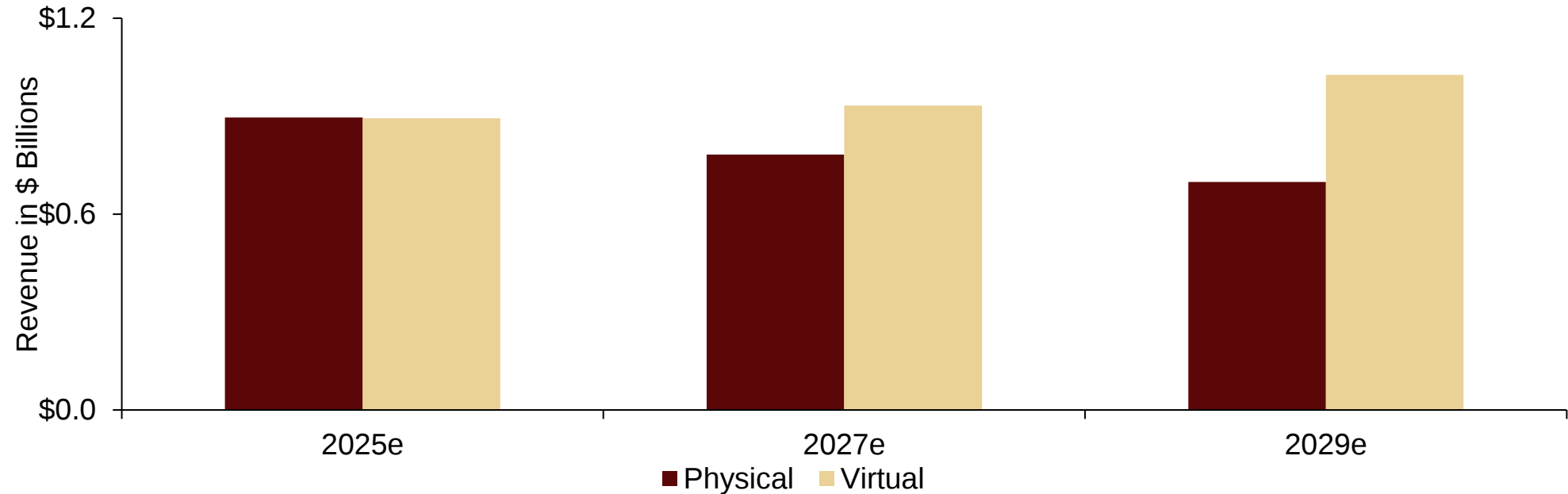
A10 Networks

Application Delivery Controller Market Share Leader 2024



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

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

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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