Europe Enterprise Firewall - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Enterprise Firewall Market size is estimated at USD 3.57 billion in 2024, and is expected to reach USD 6.32 billion by 2029, growing at a CAGR of 9.95% during the forecast period (2024-2029).

As the cybersecurity skills gap persists, enterprises in the coming years may seek firewalls as an optimal solution that is easier to manage and requires less specialized expertise for configuration and monitoring.

Key Highlights
-Enterprise firewalls are essential units of network security. They examine the flow of inbound and outbound data packets in an enterprise network against a set of predefined values to detect any malicious activity in the network.
-Moreover, Europe has some of the strictest data protection regulations worldwide, such as the General Data Protection Regulation (GDPR). For example, the European Data Protection Board (EDPB) is an independent organization responsible for ensuring that data protection laws are consistently followed across the entire European Union. The General Data Protection Regulation (GDPR) created the EDPB. Enterprises operating in the region are compelled to implement robust security measures, including firewalls, to ensure compliance with these regulations and protect user data.
-Moreover, the zero trust security model gained traction, emphasizing the principle of "never trust, always verify." Firewalls played a key role in enforcing access controls based on user identity, device posture, and other contextual factors. According to Okta's report, in 2021, 82% of European organizations boosted their Zero Trust expenditures, while no company in the region reported a drop. This occurs when budget cuts have been prevalent, highlighting the significance of Zero Trust as a security solution.
-With the emergence of cloud technology, firewalls are now being deployed, which offer a bundled solution that ensures the availability of a firewall on any device, addresses any traffic workload, and enforces similar policies across the organization.
-The rapid use of web applications, rapid adoption of cloud technologies, and the increasing demand for security services to

mitigate the risk of cyberattacks are also driving the growth of the enterprise firewall market in Europe. In order to protect the data & information from security breaches and cyber-attacks, the implementation of network security firewalls is growing across various end-use enterprises. Consequently, driving the growth of the overall network security firewalls market.
-However, organizations with legacy systems or outdated network architectures in the region might need help with compatibility issues when implementing modern firewall solutions. This could delay or hinder the adoption of advanced firewalls.
-Further, COVID-19 had a significant impact on the enterprise firewall market in Europe. As businesses transitioned to cloud-based operations to ensure business continuity, the need for cloud security solutions, including cloud-native firewalls, grew. This trend contributed to the demand for firewalls that could secure cloud environments.

Europe Enterprise Firewall Market Trends

Increasing adoption of Cloud Services among Enterprises to Drive the Market Growth

- Organizational processes have been significantly altered by cloud services, which offer scalability, flexibility, and accessibility to resources. However, as more individuals utilize cloud services, the demand for strong security measures, such as corporate firewalls, to safeguard the data, apps, and infrastructure used in cloud-based environments is rising.
- Businesses all around Europe are undertaking a digital transformation to increase productivity, reorganize workflows, and innovate in response to shifting consumer needs. By delivering scalable infrastructure, Software as a Service (SaaS) applications, and Platform as a Service (PaaS) options, cloud services serve as a framework for this transformation. However, this transition requires adequate security solutions to protect cloud-based assets.
- For instance, the majority (94%) of EU businesses who purchased cloud computing services also utilized at least one cloud Software as a Service (SaaS), which includes security software applications as a cloud service, according to Eurostat. Additionally, the adoption of cloud SaaS across all corporate sizes has been reported to be approximately 94%, which signifies the widespread adoption of cloud-based applications, including security solutions. This high adoption rate indicates businesses are embracing cloud-based tools to enhance their operations, including cybersecurity.
- Also, the complexities of the threat landscape increase with the growth of cloud computing, highlighting the need for modern security solutions that can defend against the upsurge in malware and ransomware assaults and offer consistent security across cloud systems. As per SonicWall Cyber Threat Report 2022, Malware assaults and ransomware efforts significantly increased in Europe by 29% and 63%, respectively, year over year. In addition, seven of the top 11 ransomware target nations in terms of volume were in Europe (United Kingdom, Italy, Germany, Netherlands, Norway, Poland, and Ukraine), indicating a change in the region's cyber threat environment.

United Kingdom is Expected to Hold a Significant Market Share

- The United Kingdom boasts a robust and mature cybersecurity ecosystem that includes various cybersecurity companies, research institutions, and skilled professionals. This ecosystem fosters innovation and the development of advanced cybersecurity solutions, including enterprise firewall technologies.
- Many international enterprises, financial institutions, and technological firms operate in the United Kingdom, a major financial and business center. Enterprise firewalls are in considerable demand as a result of these enterprises' necessity for advanced cybersecurity solutions to safeguard their confidential data, intellectual property, and consumer data.
- Also, the country is actively pursuing digital transformation across various industries. As organizations modernize their operations, adopt cloud services, and embrace IoT devices, the need for advanced firewall solutions to secure these digital initiatives becomes crucial.

- Moreover, in 2022, according to DSIT UK, most of the United Kingdom's registered cyber security companies provided professional cyber services, including offering guidance, products, or solutions associated with cyber security. Network security was recorded to be registering around 61%, the second most significant service that businesses offered the most frequently. Such significant network security registered firms in the country align closely with the functionalities of enterprise firewalls, which play a crucial role in safeguarding networks from unauthorized access, data breaches, malware, and other cyber attacks.
- Additionally, the nation is host to a pool of knowledgeable cybersecurity experts who contribute to the creation, application, and administration of firewall systems. For instance, the Office for National Statistics (UK) reported that the IT, software, and computer services sub-sector in the UK's creative industries employed more than one million individuals as of September 2022, compared with the previous year, recording 940,000. About 108,000 of these individuals were self-employed. Such a significant growth rate in the workforce supports the deployment of sophisticated security measures across industries.

Europe Enterprise Firewall Industry Overview

The Europe enterprise firewall market is expected to be moderately fragmented owing to the presence of global and local players. The players are actively engaging in partnerships and collaborations to enhance their solutions through combined expertise in the industry. Prominent players in the enterprise firewall market include Cisco Systems, Dell Inc., Palo Alto Networks, and Fortinet Inc.

In May 2023, Palo Alto Networks announced that as a fully managed Azure-native ISV service, the firm will deliver its ML-powered next-generation Firewall (NGFW) to Microsoft Azure. Cloud NGFW for Azure provides a complete security solution with advanced capabilities, including Advanced Threat Prevention, Advanced URL Filtering, WildFire, and DNS Security. Moreover, the firm mentioned that Cloud NGFW for Azure is made available in West Europe.

In February 2023, Sophos, a United Kingdom-based cybersecurity service provider, announced the expansion of its next-generation firewall portfolio with two new enterprise-grade XGS Series appliances. The new XGS 7500 and 8500 models may offer large enterprises and campus installations optimal performance and protection, expanding market prospects for the supporting channel partners.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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