



EXECUTIVE OVERVIEW

MARKET  
MAP

# Storage Market Map 2017

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The storage universe continues to expand by generating new vendors and technologies, while the largest industry players are currently prioritizing developments in all-flash, hyperconverged, object and cloud storage, and data resiliency. This report defines the main storage market segments, and the position of almost 170 vendors in those segments.



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# Key Findings

Probably the greatest area of storage innovation at present is an expansion by backup vendors into the broader area of data management, with the aim of both improving data protection and allowing more value to be extracted from data.

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Sales of hyperconverged storage continue to grow rapidly, creating a widely deployed alternative to conventional networked storage, and fueling acquisitions of smaller suppliers by large vendors.

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The transition of primary storage from disk to hybrid and all-flash systems is continuing, but the incumbent vendors have regained control of both sectors.

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The first wave of all-flash storage is being followed by a second wave of systems that will not see as rapid take-up as the first, and comprise systems powered by NVMe flash and networked NVMe or equivalents, which are aimed at very high performance applications such as analytics.

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As public cloud usage increases, storage vendors are attempting to maintain their future relevance within hybrid cloud computing.

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Revenue for the primary storage market is continuing to decline at a slow rate, for reasons including the near-commoditization of products and the growing use of public cloud storage.

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# Executive Summary

## INTRODUCTION

The 2017 Storage Market Map lists the major vendors and potentially significant smaller suppliers and newcomers across the various subsectors of the storage market. The map is split in two, with one section covering primary storage and the other focusing on secondary and cloud storage. The primary map includes all-flash arrays (AFAs), hyperconverged infrastructure (HCI) and emerging solid-state memories. The second map covers data protection (including backup, disaster recovery [DR] and tape), cloud storage and cloud gateways, and object storage. In total, the maps list 168 vendors that we judge as significant. MSPs and other service providers that are offering cloud storage or online backup services have been excluded as they number in the thousands.

## METHODOLOGY

451 Research Market Maps™ are designed to provide a view of the vendor landscape by major segment. The map highlights companies competing in multiple segments by connecting them through a circuit line. Identification and placement of companies into these segments is based on analysis, both published and unpublished, performed by 451 Research. This analysis is based on interviews, reports and advisory work with several thousand enterprises, vendors, service providers and investors annually. 451 Research Market Maps™ are not intended to represent a comprehensive list of every vendor operating in this market. Inclusion on 451 Research Market Maps™ does not imply that a given vendor will be specifically featured in one or more 451 Research reports.

# Table of Contents

<b>1. THE 451 TAKE</b>	<b>1</b>
<hr/>	
<b>2. THE PRIMARY STORAGE AND RELATED SECTORS MARKET</b>	<b>2</b>
<i>Figure 1: 451 Research Primary Storage and HCI Market Map™</i> . . . . .	2
ALL-FLASH ARRAYS . . . . .	3
PRIMARY STORAGE AND RELATED SOFTWARE . . . . .	4
HYPERCONVERGED SYSTEMS AND SOFTWARE . . . . .	5
HDD/SDD MEDIA AND NEXT-GENERATION SOLID STATE . . . . .	5
<hr/>	
<b>3. THE SECONDARY AND CLOUD STORAGE MARKET</b>	<b>6</b>
<i>Figure 2: 451 Research Secondary and Cloud Storage Market Map™</i> . . . . .	6
BACKUP, DATA PROTECTION AS A SERVICE, DR/BC AND TAPE . . . . .	7
OBJECT-BASED STORAGE . . . . .	8
CLOUD STORAGE AS A SERVICE AND GATEWAYS . . . . .	9
<i>Figure 3: Summary Chart: Market Challenges and Innovations</i> . . . . .	10
<hr/>	
<b>4. MARKET DYNAMICS AND HOTSPOTS</b>	<b>11</b>
DEVELOPMENTS IN PRIMARY STORAGE . . . . .	11
SECOND-WAVE AFAS – A SLOWER WAVE THAN THE FIRST . . . . .	12
NEW MEMORIES ARE COMING . . . . .	12
HYPERCONVERGENCE HAS EXPLODED . . . . .	12
BACKUP AND DR ARE IN FLUX . . . . .	12
THE CLOUD IS GROWING AND SPAWNING GATEWAYS . . . . .	13
METADATA IS THE NEW DATA, AND IS DRIVING TAKE-UP OF OBJECT STORAGE . . . . .	13
<i>Figure 4: Major Market Players: Key Attributes</i> . . . . .	14

---

<b>5. CONCLUSIONS AND RECOMMENDATIONS</b>	<b>15</b>
RECOMMENDATIONS FOR ENTERPRISES . . . . .	15
RECOMMENDATIONS FOR SERVICE PROVIDERS . . . . .	15

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<b>6. FURTHER READING</b>	<b>17</b>
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<b>7. INDEX OF COMPANIES</b>	<b>18</b>
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