

## **Data Center Storage Market - Global Outlook & Forecast 2022-2027**

Market Report | 2022-09-27 | 300 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global data center storage market is expected to grow at a CAGR of 4.72% during 2022-2027.

### **MARKET INSIGHTS**

Data center storage includes all the infrastructure, i.e., tools, processes, and technologies that enable the design, management, and monitoring of the data stored within a data center. Data storage can be classified into three ways - block level, file level, or object level. The storage market comprises several products such as hard disk drives, storage networking, solid state drives, and other infrastructure. The infrastructure mentioned above is necessary for efficient data center storage.

The data center storage market is currently dominated by HDD adoption, with around two-thirds of the market adopting the technology, with key vendors such as Seagate Technology, Western Digital, and Toshiba. Over the coming years, the demand for SSDs is also witnessing a boost, especially from data center operators and telecom companies deploying edge data centers and advanced technology such as cloud, AI, IoT, and big data.

Global demand for cloud and colocation services has soared, particularly since the COVID-19 outbreak. North America has the highest data center storage market, followed by other regions such as APAC and Europe. Expansions also dominate the market by global and local cloud service providers. Furthermore, demand gets driven by consumer support for the growing consumption of online content and digitalization initiatives across various industries. Most governments worldwide are keen to develop the digital economy of their country. They are allocating higher budgets for IT spending, which will drive the global data center storage market.

### **KEY HIGHLIGHTS**

- Over the next few years, trends driving the global data center storage market include increasing edge deployments, flash/NVMe storage adoption, and the increasing popularity of software-defined storage. Among the various storage infrastructures available,

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NAS storage leads around 70% of the industry share. Content providers, media, and entertainment businesses will be the significant adopters of NAS-based flash storage solutions.

- Traditional storage, especially HDDs, dominates the global data center storage market. The adoption of hybrid storage, combining the capabilities of HDDs and SSDs, will increase over the next few years and grow at the highest CAGR.

- Seagate Technology, Toshiba, and Western Digital are the vendors supplying HDDs to the data center storage market. In addition, companies such as Pure Storage, Huawei Technologies, Dell Technologies, Fujitsu, etc., are some of the major SSD vendors in the industry.

## SEGMENTAL ANALYSIS

### INSIGHTS BY STORAGE INFRASTRUCTURE

- NAS allows file-level access to data. It uses the existing IP network to transfer data. NAS works on protocols such as NFS (Network File System) or CIFS (Common Internet File System).

- SAN enables block-level access to data and can be defined based on the interconnection scheme such as FC SAN and iSCSI SAN. FC SAN enables the communication between the server and the external storage system at a speed of 2?32 Gbps.

- DAS is a topology where storage devices are attached to servers. These direct attached storage solutions are typically NAND flash-based.

#### Segmentation by Storage Architecture

- NAS

- SAN

- DAS

### INSIGHTS BY SYSTEM

- Traditional storage includes devices that support only HDD (Hard Disk Drives). A hard disk drive or HDD is a non-volatile data storage. This means that data once stored in these drives will be retained even after the system is shut down. HDDs have speeds much lesser than SSDs, but at the same time, they offer higher capacities at reasonably low prices. Due to this, it currently dominates the Latin America data center storage market.

- Flash storage is the type of system, repository, or drive which helps to store data for long periods using flash memory which is non-volatile memory. Flash storage is widely used in SMEs or large businesses as a storage system.

- A hybrid drive is a type of storage device which combines the capabilities of HDDs and SSDs in one drive. It utilizes the faster access capability of SSDs as the cache is used for frequently accessed data and the higher storage capacity of HDDs. Hybrid storage helps to utilize storage effectively, decrease the overall storage footprint, and streamline storage management.

#### Segmentation by System

- Traditional Storage

- Flash Storage

- Hybrid Storage

#### Segmentation by Industry

- BFSI Sector

- Government Sector

- Cloud/IT Sector

- Others Industrial Sectors

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## KEY TRENDS

- a) Worldwide, cloud, IT, and telecom expect to witness the fastest growth in the industry. The adoption of the cloud by businesses, the development of data centers for 5G deployments, and the pay-as-you-go model for cloud storage are some of the driving forces behind this increase.
- b) BFSI is another industry that will witness significant growth in storage infrastructure adoption. In 2021, over 1.5 million users onboarded Brubank, a fully digital bank authorized to conduct operations by the Central Bank of Argentina. Similarly, WeBank, with Tencent as a prime investor, caters to around 200 million people.
- c) Adopting technology such as big data and IoT by local enterprises through digitalization initiatives has resulted in a significant rise in the procurement of all-flash and hybrid array systems.
- d) Increasing innovations in storage media expected to impact the global data center storage market include the adoption of DNA and holographic storage. With companies like Quantum (LTO-9, LTO-8, and LTO-7 tape drives) and Hewlett Packard Enterprise (LTO Ultrium) providing tape storage in the market, the tape storage market is coming back into the storage industry.
- e) Adoption of software-defined storage is expected to increasingly be used in data center storage over the next few years, mainly because over 80% of data generated is unstructured, making it more difficult to store in a traditional storage system. Software-defined storage for the use cases is currently low in the market; with more cases in countries such as Western Europe, the US, and China, the adoption will grow, along with hyper-converged platforms/rack-level architecture.

## GEOGRAPHICAL ANALYSIS:

- Globally, over 40% of the overall spending on storage infrastructure is contributed by North America, followed by APAC. Africa, the Middle East, and the Nordics will witness a double-digit CAGR growth in storage infrastructure spending over the forecast period.
- Colocation providers dominate the Latin America data center market, followed by internet and cloud service providers. The expansion of cloud computing will also be critical for colocation providers adding connectivity to cloud platforms such as AWS, Google, Oracle, Microsoft, and IBM.
- The growing internet penetration, social media usage, and smart initiatives are the major drivers for the Middle East data center industry. Telecommunication providers, enterprises, governments, cloud, and colocation service providers are the major investors in developing data center facilities.
- Countries like Poland, Spain, Portugal, Belgium, and Italy are some of the upcoming investment destinations in Europe. They will also contribute significantly to the global data center storage market.
- APAC is the preferred region for cloud service and global colocation providers. The industry in the Asia Pacific is witnessing steady growth with continued investments from AWS, Microsoft, Alibaba, and Facebook. Government agencies across several countries in APAC are also actively involved in developing centers to digitalize their operations.

## Segmentation by Geography

- North America
  - o US
  - o Canada
- Latin America
  - o Brazil
  - o Other Latin American Countries
- Western Europe
  - o UK
  - o Germany

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- o France
- o Netherlands
- o Ireland
- o Other Western European Countries
- o Nordics
- o Sweden
- o Other Nordic Countries
- o Central & Eastern Europe
- o Russia
- o Other Central & Eastern European Countries
- Middle East & Africa
  - o UAE
  - o Saudi Arabia
  - o Other Middle Eastern Countries
  - o Africa
    - o South Africa
    - o Other African Countries
- APAC
  - o China & Hong Kong
  - o Australia & New Zealand
  - o Japan
  - o India
  - o Rest of APAC
  - o Southeast Asia
    - o Singapore
    - o Other Southeast Asian Countries

## VENDOR ANALYSIS

- There is intense competition in the global data center storage market, especially since hyperscale operators are buying ODM infrastructure to meet their storage requirements. OEM infrastructure is more frequently used while deploying on-premises storage infrastructure.
- The major procurement of storage infrastructure worldwide is being carried out by cloud service providers involved in rapid expansions with additional cloud regions. These operators are engaged in acquiring storage systems, varying in performance from low to high.
- Storage infrastructure players such as Fujitsu, Huawei, IBM, HPE, NetApp, Pure Storage, and Dell Technologies have a significant presence, directly or through reseller/distribution partners. Nvidia has collaborated with IBM and some universities in the US to develop an architecture called Big Accelerator Memory BAM. BAM architecture helps to create a direct link between the storage and GPU.
- Oil and Natural Gas Corporation Limited (ONGC), an oil and gas company in India, hosts its SAP S/4HANA workloads on Hewlett Packard Enterprise's HPE GreenLakeedge-to-cloud platform. This platform helps the company improve performance, accelerate digitization, and improve analytics insights.
- Oulun Datacenter in Finland has adopted NetApp's flash storage and expanded its existing NetApp-based FAS storage to meet the requirements of its customers.

## Key Vendors

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- []KIOXIA
- []Lenovo
- []Micron Technology
- []NEC
- []NetApp
- []Oracle
- []Pure Storage
- []Samsung Electronics
- []Seagate Technology
- []Solidigm
- []Toshiba
- []Viking Technology
- []VIOLIN
- []Western Digital
- []Wistron (WIWYNN)
- []ZOTAC

#### KEY QUESTIONS ANSWERED

- 1.[]How big is the global data center storage market?
- 2.[]What is the growth rate of the data center storage market growing?
- 3.[]Which region dominates the global data center storage market share?
- 4.[]What are the growth factors in the data center storage market?
- 5.[]Who are the key players in the global data center storage market?
- 6.[]What are the latest trends in the global data center storage market?

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