Worldwide High Performance Computing 2018 Total Market Model: Storage Revenue Shares

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EXECUTIVE SUMMARY

This Intersect360 Research report presents vendor revenue and market share for storage in the High Performance Computing (HPC) market for 2018.

Intersect360 Research defines HPC as the use of servers, clusters, and supercomputers—plus associated software, tools, components, storage, and services—for scientific, engineering, or analytical tasks that are particularly intensive in computation, memory usage, or data management. Intersect360 Research reports available in this series include the following segmentations:

- *Products and Services:* servers, storage, networks, software, service, cloud, other
- *Economic sectors:* industry, government, academia
- *Vertical markets:* academia, national security, national research labs, national agencies, state or local governments, bio sciences, chemical engineering, consumer product manufacturing, electronics, energy, financial services, large product manufacturing, media and entertainment, retail, transportation, other commercial
- *Regions:* North America, EMEA, Asia-Pacific, Latin America
- *Server class (HPC server revenue):* entry-level, midrange, high-end, supercomputer
- *Cloud categories (HPC cloud revenue):* raw cycles, cloud storage, application hosting (SaaS), infrastructure hosting (IaaS, PaaS), other
- *Software categories (HPC software revenue):* operating environments, developer tools, middleware, storage software, transfer costs, application software, other
- *Services categories (HPC services revenue):* maintenance and repair, system engineering, system integration, training, programming services, other
- *HPC server market shares* (current year only, not forecast)
- *HPC storage market shares* (current year only, not forecast)

The HPC storage category grew to approximately $5.7 billion worldwide in 2018, up 1.0% from 2017. Dell EMC maintained a commanding market share lead, with above-average revenue growth. The top seven ranks in market share remained unchanged, with the highest growth percentages going to the HPC-focused storage vendors, DataDirect Networks (DDN) and Panasas. Hewlett Packard Enterprise (HPE), currently the number-three vendor behind number-two NetApp, could add share in 2020 with its acquisition of Cray and its ClusterStor line, combined with additional resources for those products; this would not affect market shares in 2019. Meanwhile, NetApp is benefiting from an OEM partnership with Lenovo.

This report gives revenues, shares, and analysis for Atos (Bull), DDN, Dell EMC, Fujitsu, Hitachi Data Systems (HDS), HPE, IBM, Lenovo, NetApp, and Panasas. These top ten vendors were responsible for over 85% of HPC storage market revenue. This report also includes brief discussion of Cray, Huawei, Intel, Kaminario, Oracle, Pure Storage, Quantum, Seagate, Spectra Logic, Violin Systems, and WekaIO.

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COMPANIES MENTIONED IN THIS REPORT

Companies mentioned in this report, in alphabetical order, include:

- Atos (Bull)
- Cray
- Data Direct Networks (DDN)
- Dell EMC
- Fujitsu
- Hewlett Packard Enterprise (HPE)
- Hitachi Data Systems (HDS)
- Huawei
- IBM
- Intel
- Kaminario
- Lenovo
- NetApp
- Oracle
- Panasas
- Pure Storage
- Quantum
- Seagate
- Spectra Logic
- Violin Systems
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