

Gartner: ECB Disk Storage on the Up

Written by Marco Attard
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According to Gartner global Q4 2013 external controller-based (ECB) disk storage revenues total \$6.3 billion-- a 5% Y-o-Y increase and return to growth following an "abysmal" Q3 2013.

"Driven by pent-up demand and the year-end budget flush phenomenon, the market overcame a fragile global economy" the analyst says.

Worldwide ECB Disk Storage Vendor Revenue Estimates for 4Q13 (Millions of U.S. Dollars)

Company	4Q13 Revenue	4Q13 Market Share (%)	4Q12 Revenue	4Q12 Market Share (%)	4Q13-4Q12 Change (%)
EMC	2,257.4	36.0	2,067.4	34.6	9.2
IBM	900.3	14.3	976.6	16.3	-7.8
NetApp ²	658.1	10.5	637.3	10.7	3.3
HP	600.7	9.6	479.4	8.0	25.3
Hitachi/HDS ¹	549.1	8.8	576.9	9.7	-4.8
Dell	336.6	5.4	393.4	6.6	-14.4
Huawei	120.1	1.9	-	-	-
Fujitsu ³	102.8	1.6	98.3	1.6	4.6
Oracle	60.0	1.0	69.7	1.2	-14.0
Others	689.1	11.0	674.6	11.3	2.1
Total	6,274.1	100.0	5,973.5	100.0	5.0

Note 1: Hitachi/HDS revenue excludes OEM revenue from HP. Note 2: NetApp revenue excludes ONTAP OEM revenue from IBM and Engenio OEM revenue. Note 3: Fujitsu's branded revenue does not include products sold under the EMC and NetApp brands.

Source: Gartner (March 2014)

Only EMC and HP beat 5% market growth rate-- HP leads when it comes to growth (25.3% Y-o-Y) thanks to broad acceptance of the 3PAR StoreServ and StorOnce disk-based backup platforms, while market leader EMC sees success through the VNX and Data Domain refreshes.

Further enabling EMC growth (9.2% Y-o-Y) is increasing traction of the Clustered Data ONTAP operating system within both its installed base and as an alternative to competing solutions,

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Gartner says.

Meanwhile Dell, IBM and Oracle continue to underperform and lose share-- Dell sees the highest losses (-14.4% Y-o-Y) as the Compellent offering fails to offset declines within the rest of the Dell ECB disk storage portfolio. IBM fails to gain enough traction from its IP-based disk storage products, and Oracle suffers from inadequate market coverage.

Worldwide ECB Disk Storage Vendor Revenue Estimates for 2013 (Millions of U.S. Dollars)

Company	2013 Revenue	2013 Market Share (%)	2012 Revenue	2012 Market Share (%)	2013-2012 Change (%)
EMC	7,723.2	34.3	7,448.7	33.5	3.7
IBM	2,853.5	12.7	2,963.9	13.3	-3.7
NetApp2	2,666.7	11.8	2,508.3	11.3	6.3
HP	2,081.3	9.2	1,962.5	8.8	6.1
Hitachi/HDS3	1,997.0	8.9	2,138.2	9.6	-6.6
Dell	1,474.2	6.5	1,609.8	7.2	-8.4
Fujitsu3	484.7	2.2	457.7	2.1	5.9
Huawei	340.2	1.5	-	-	-
Oracle	223.6	1.0	319.7	1.4	-30.1
Others	2,679.3	11.9	2,806.4	12.6	-4.5
Total	22,523.9	100.0	22,215.2	100.0	1.4

Note 1: Hitachi/HDS revenue excludes OEM revenue from HP. Note 2: NetApp revenue excludes ONTAP OEM revenue from IBM and Engenio OEM revenue. Note 3: Fujitsu's branded revenue does not include products sold under the EMC and NetApp brands.

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On a full-year 2013 basis the market totals \$22.5bn with 1.4% growth, the lowest since the 2009 decline as global macroeconomies (including EMEA, N. America and Asia/Pacific) remain muddled. Gartner adds pricing per terabyte continues to decline as expected, but ASPs are up by 5.1%, signaling larger configurations.

Go [Gartner Says WW ECB Disk Storage Market Grew 5% in Q4 2013](#)