

Dell'Oro: Cloud Boosting Ethernet Shipments

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According to Dell'Oro Group, more 10 Gbps ethernet port shipments are going towards cloud customers, even as shipments to traditional servers are actually declining.



The analyst says Q4 2011 10 Gbps ethernet controller and adapter shipments show "modest" 3% Q-o-Q growth, reaching 1.3M units-- but shipments to cloud customers are growing "about 10 times faster" than the overall market.

Mellanox managed to double Q4 adapter shipments thanks to one large cloud customer, while Intel LOM shipments are heading towards stand-alone cloud servers.

Dell'Oro also expects a "surge" in Q1 2012 ethernet port shipments as Intel launches Romley, its next server platform.

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