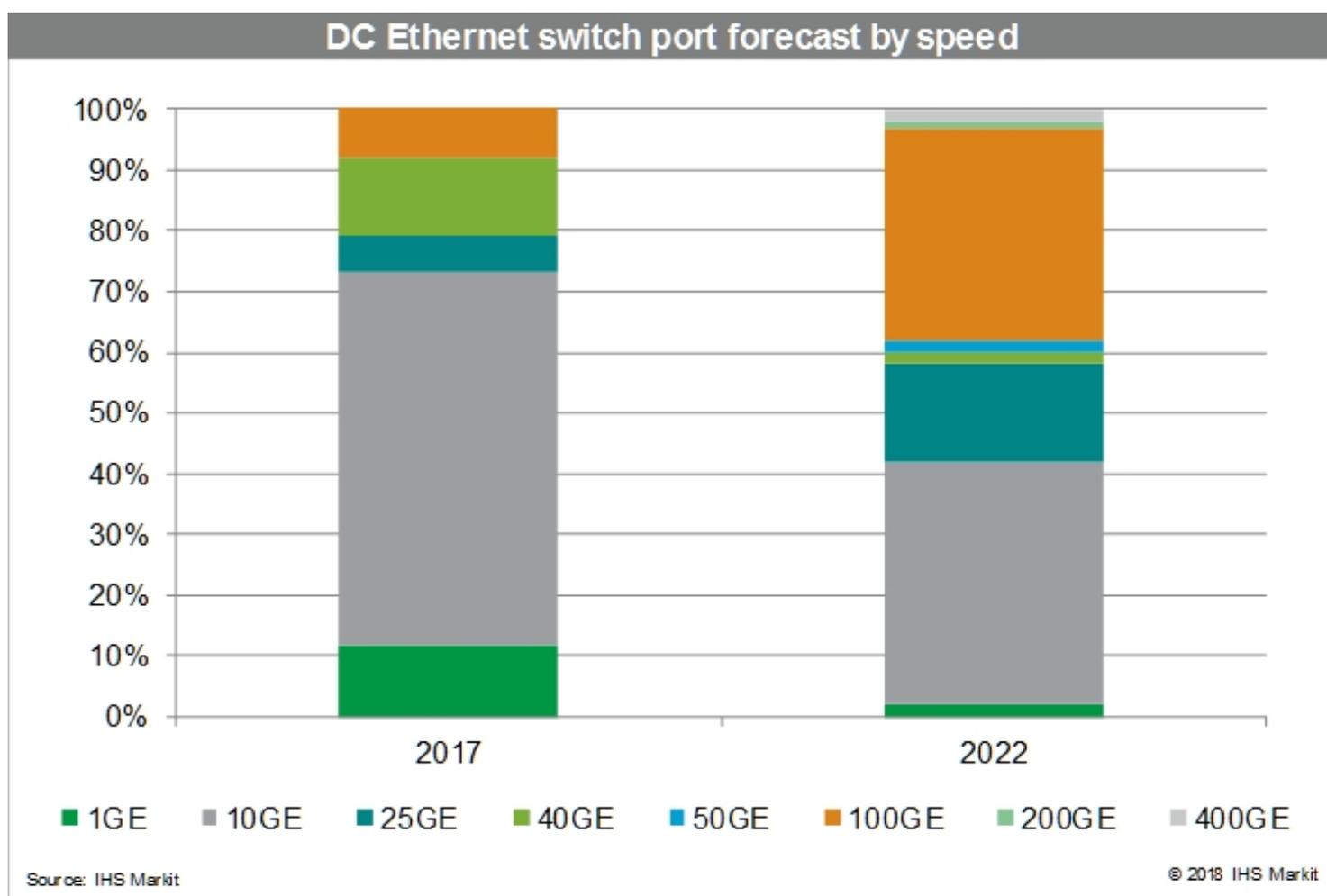


IHS: Datacentre Switches Up by 12% in Q1

Written by Alice Marshall
06 July 2018

According to IHS Markit, datacentre switch revenue totals \$2.8 billion in Q1 2018-- a 12% Y-o-Y increase, with bare metal and purpose-built switch revenues growing by 35% and 15% Y-o-Y respectively.

Both traditional and white box vendors currently offer bare metal switches, while purpose-built switches embedded with data plane programmable silicon from Broadcom, Cavium, and Barefoot Networks are on the increase. For instance, no.2 datacentre switching vendor Arista has released several switches with programmable silicon from each of the 3 aforementioned companies.



“Bare metal switch shipments continue their long-term growth as hyperscale and tier 2 cloud

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service providers (CSPs), telcos adopting NFV, and large enterprises increase their deployments worldwide”, IHS says. “A mix of bare metal and purpose-built switches using programmable silicon from a handful of chip vendors continues to displace traditional switches in the market.”

The analyst expects 25GE datacentre switch ports to make 16% of ports shipped by 2022, a 6% increase from 2017, and 100GE ports to reach 35% of switch ports shipped, up from 9% from 2017. Dell shipped a first 25GE branded bare metal switch at the end of 2017, and Arista has released several switches, including four 100GE and one 25GE, since February 2018. Another maker of 25 and 100GE switches is Juniper.

IHS believes 25GE switches will have a "noticeable negative effect" on 10GE switch growth, since CSPs prefer 25GE for server connectivity and 100GE at the access and core layer. As a result, 100GE top-of-rack (TOR) switches connected to 25GE server ports and the availability of 100GE bare metal switches will drive further 100GE deployments, leading to triple-digit shipment growth for both 25 and 100GE switches in Q1 2018. In the meantime 200/400GE deployments are ever closer, with shipments expected to start from 2019.

As for the ADC segment, F5 holds 46% Q1 2018 market share, with revenues up by 4% Q-o-Q. Citrix follows with 29% of revenue, and A10 is 3rd with 9% share. However Q1 2018 ADC revenue is down by -4% Y-o-Y to \$453m, with virtual ADC appliances making 31% of revenues for the quarter.

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