NEEDHAM, Mass., June 10, 2021 – According to the International Data Corporation (IDC) Worldwide Quarterly Enterprise Storage Systems Tracker, global market revenue for enterprise external OEM storage systems grew 1.7% year over year to $6.7 billion during the first quarter of 2021 (1Q21). Total external OEM storage capacity shipped was up 16.3% year over year to 19.9 exabytes during the quarter.

1Q21 revenue generated by the group of original design manufacturers (ODMs) selling directly to hyperscale datacenters grew at 14.1% year over year to $5.6 billion, while capacity shipped grew 28.3% year over year to 70.2 exabytes. Enterprise storage capacity shipments for the entire market (External OEM + ODM Direct + Server-Based Storage) increased 20.6% to 118.8 exabytes.

"After four quarters of market contraction, the first quarter of 2021 represented an important moment of recovery for the external storage systems market," said Zsofia Madi-Szabo, research manager, Infrastructure Platforms and Technologies at IDC. "While economies around the world are recovering from the prolonged impact of the global pandemic, geographic results for the external enterprise storage market were mixed. Asia/Pacific and EMEA lead the recovery with 11.5% and 4.9% respective increase in spending, while sales within the Americas fell by 5.4% during the quarter. Clearly it is going to take time for the global enterprise storage market to fully recover from the substantial negative impacts of COVID-19."

Enterprise External OEM Storage Systems Results, by Company

Dell Technologies(a) was the largest external enterprise storage systems supplier during the quarter, accounting for
32.3% of worldwide revenue. NetApp was the second largest vendor during the quarter, with 10.9% of revenue. HPE/H3C(b) was the third largest vendor with 9.4% of revenue. Hitachi and Huawei tied* for fourth place in the market with shares of 5.8% and 5.4%, respectively.

<table>
<thead>
<tr>
<th>Company</th>
<th>1Q21 Revenue</th>
<th>1Q21 Market Share</th>
<th>1Q20 Revenue</th>
<th>1Q20 Market Share</th>
<th>1Q21/1Q20 Revenue Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Dell Technologies(a)</td>
<td>$2,160.7</td>
<td>32.3%</td>
<td>$2,162.0</td>
<td>32.9%</td>
<td>-0.1%</td>
</tr>
<tr>
<td>2. NetApp</td>
<td>$728.9</td>
<td>10.9%</td>
<td>$715.7</td>
<td>10.9%</td>
<td>1.8%</td>
</tr>
<tr>
<td>3. HPE/H3C(b)</td>
<td>$626.9</td>
<td>9.4%</td>
<td>$646.3</td>
<td>9.8%</td>
<td>-3.0%</td>
</tr>
<tr>
<td>T4. Hitachi*</td>
<td>$390.5</td>
<td>5.8%</td>
<td>$430.8</td>
<td>5.5%</td>
<td>-9.3%</td>
</tr>
<tr>
<td>T4. Huawei*</td>
<td>$365.1</td>
<td>5.5%</td>
<td>$279.8</td>
<td>4.3%</td>
<td>30.5%</td>
</tr>
<tr>
<td>Rest of Market</td>
<td>$2,417.9</td>
<td>36.1%</td>
<td>$2,342.6</td>
<td>36.6%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Total</td>
<td>$6,689.9</td>
<td>100.0%</td>
<td>$6,576.7</td>
<td>100.0%</td>
<td>1.7%</td>
</tr>
</tbody>
</table>


Figure 1
Flash-Based Storage Systems Highlights

The total All Flash Array (AFA) market generated $2.7 billion in revenue during the quarter, down 3.3% year over year. The Hybrid Flash Array (HFA) market was worth nearly $2.5 billion in revenue but was up 1.4% from the year ago quarter.

Regional External Storage System Highlights

On a geographic basis, storage revenue in China grew 34.9% year over year. Japan declined 11.5% in 1Q21 compared to 1Q20, while Asia/Pacific (excluding Japan and China) was up 2.1%. EMEA grew 4.9% in aggregate on a year-over-year basis. The United States was down 4.9% but Canada grew 12.9%. Latin America was the hardest hit region this quarter, down 28.2%.

Notes:
* IDC declares a statistical tie in the worldwide enterprise external storage market when there is a difference of one percent or less in the share of revenues or shipments among two or more vendors.

(a) Dell Technologies represents the combined revenues for Dell and EMC.

(b) Due to the existing joint venture between HPE and H3C, IDC is reporting external market share on a global level for HPE and H3C as "HPE/H3C" starting from 2Q 2016. Per the JV agreement, Tsinghua Holdings subsidiary, Unisplendour Corporation, through a wholly owned affiliate, purchased a 51% stake in H3C and HPE has a 49% ownership stake in the new company.

Taxonomy Notes

IDC defines an Enterprise Storage System as a set of storage elements, including controllers, cables, and (in some instances) host bus adapters, associated with three or more disks. A system may be located outside of or within a server cabinet and the average cost of the disk storage systems does not include infrastructure storage hardware (i.e., switches) and non-bundled storage software.

The information in this quantitative study is based on a branded view of the enterprise storage systems sale. Revenue associated with
the products to the end user is attributed to the seller (brand) of the product, not the manufacturer. Original equipment manufacturer (OEM) sales are not included in this study.

The IDC Worldwide Quarterly Enterprise Storage Systems Tracker is a quantitative tool for analyzing the global disk storage market on a quarterly basis. The Tracker includes quarterly shipments and revenues (both customer and factory), Terabytes, $/Gigabyte, Gigabyte/Unit, and Average Selling Value. Each criteria can be segmented by location, installation base, operating system, company, family, model, and region. The Worldwide Quarterly Enterprise Storage Systems Tracker is part of the Worldwide Quarterly Enterprise Infrastructure Tracker, which provides a holistic total addressable market view of the five key enabling infrastructure technologies for the datacenter (servers, external enterprise storage systems, purpose-built appliances: HCI and PBBA, and datacenter switches).

For more information about IDC’s Worldwide Enterprise Storage Systems Quarterly Tracker, please contact Lidice Fernandez at 305-351-3051 or lfernandez@idc.com.

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