



Some Market Perceptions, Reality and Expectations

Philippe NICOLAS

StorageNewsletter and Coldago Research

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Agenda

- Facts and Views 2019
- A bit of Predictions for 2020
- The Survey
- The Maps
- Storage Unicorns
- Conclusion

- Facts and Views 2019 from 30 vendors*
 1. By far, everything about **Cloud** (multi, hybrid, public, private, on-premises, repatriation, cloud-native)
 2. **Object storage** and **S3** (private, public)
 3. **NVMe** and **NVMe over Fabrics**
 4. Various **SaaS** dynamics – **Security** – **File Storage**
 5. **AI**
- Available at <http://pn7.fr/0895D4D8>
- But also **42 acquisitions** (HPE/Cray, DDN/IntelliFlash & Nexenta, Nvidia/Mellanox, Opentext/Carbonite, Commvault/Hedvig, AWS/E8... list on <http://pn7.fr/16E6B256>)

* Actifio, Atempo, Caringo, Cloudian, Clumio, Commvault, CTERA Networks, Data Dynamics, DataCore, DDN, FujiFilm Recording Media US, Hammerspace, Hitachi Vantara, HYCU, Infinidat, iXsystems, Kaminario, Kaseya, Komprise, Lightbits Labs, Minio, NGD Systems, Pure Storage, Quantum, Qumulo, Scale Computing, Scality, StorMagic, Weebit and WekaIO

A bit of Predictions for 2020

- Predictions from 50 vendors*
 1. Without any surprise, **cloud** arrives #1 in various flavors (multi, hybrid, on-premises, private, cloud-native and we choose to add the edge in that category)
 2. **New devices and connectivity around Flash, NVMe(-oF), SCM/PM, QLC**
 3. **Kubernetes** of course and **containers**
 4. **Analytics** and **AI**
 5. **Object storage**
- Available at <http://pn7.fr/259EA5CA>

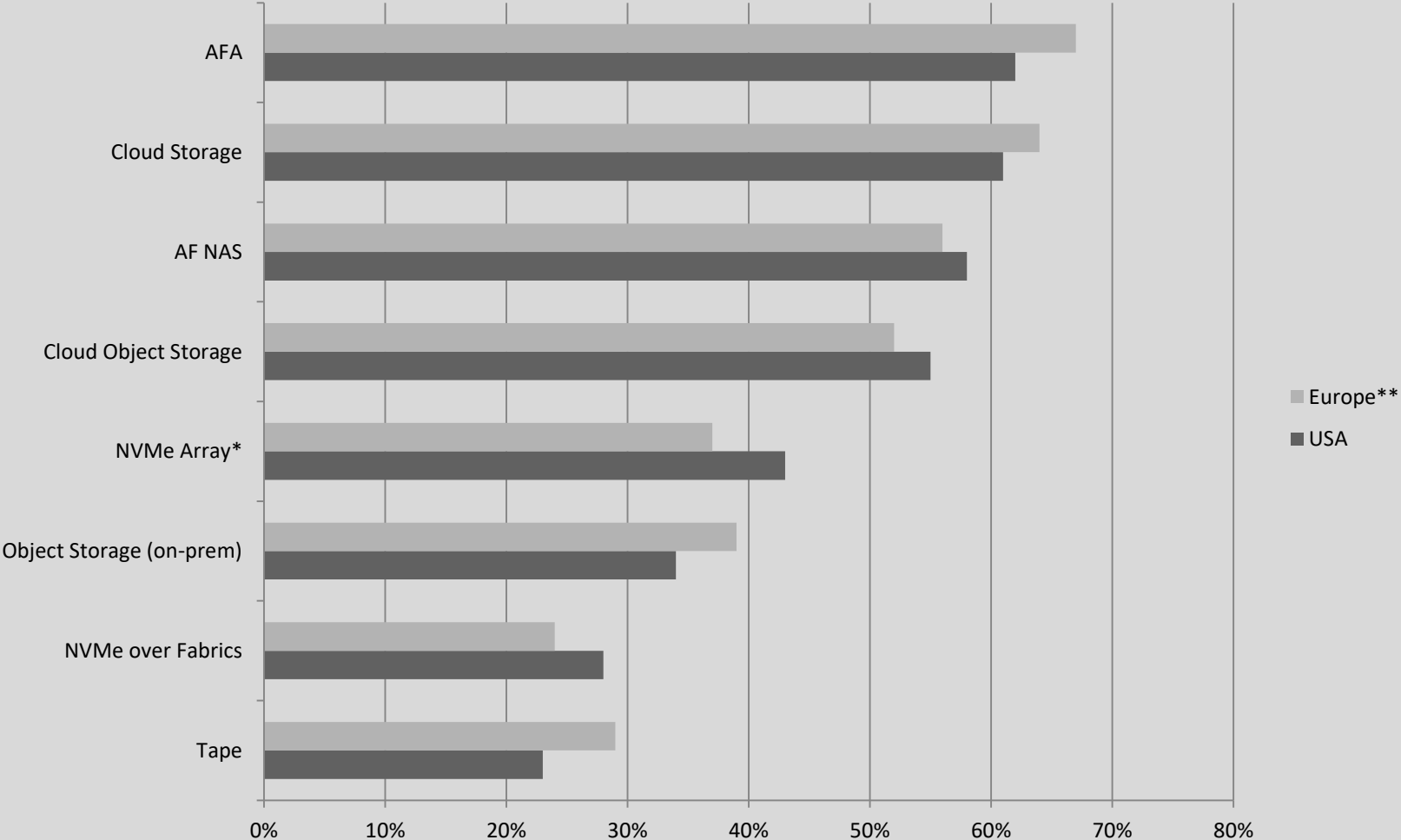
* Actifio, Atempo, Bamboo Systems, Caringo, Cloudian, Clumio, Cohesity, Commvault, CTERA Networks, Data Dynamics, DataCore, Datrium, DDN, DriveScale, ExaGrid, FujiFilm Recording Media US, Hammerspace, Hitachi Vantara, HYCU, Infinidat, iXsystems, Kaminario, Kaseya, Komprise, Lightbits Labs, MemVerge, Minio, Nasuni, NGD Systems, Panasas, Pavilion Data Systems, Portworx, Pure Storage, Quantum, Qumulo, Reduxio, Scale Computing, Scality, Spectra Logic, StorCentric, StorMagic, StorONE, StrongBox Data Solutions, Talon Storage, Virtana, Weebit, WekaIO, Western Digital, Zadara and Zerto

The Survey

- Target: End-Users
 - 560 European users from UK, Germany and France (~1/3)
 - 1123 US users
 - Enterprise and SMB (~1/2)
 - Cross verticals
- Date: January 2020
- Topics: technology adoption, projects priorities and products/features needs
- In total 20 questions, we present a sample of 10 here

Question 1

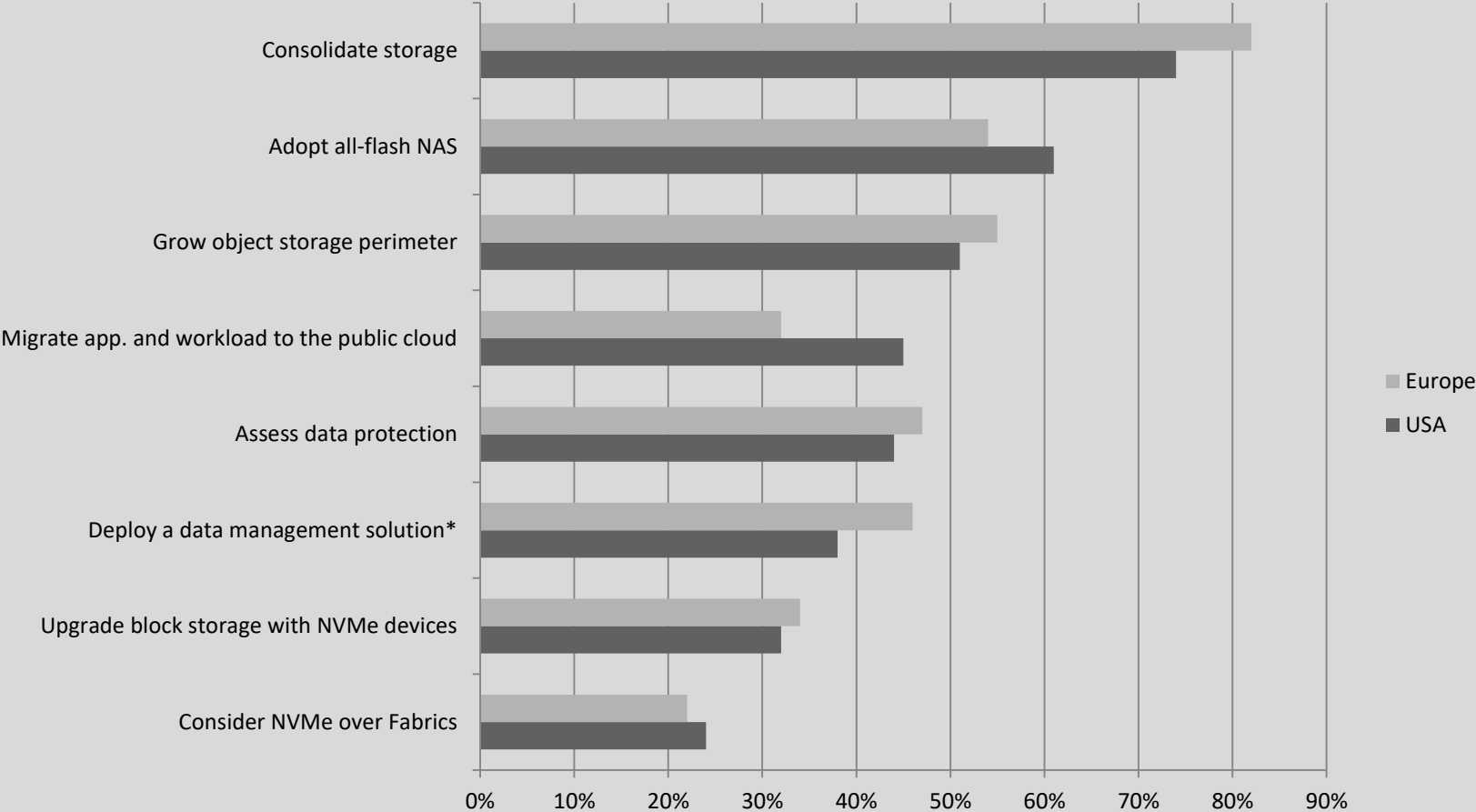
What are the technologies you will consider for new projects in 2020?



* storage array with NVMe devices
** UK, Germany, France

Question 2

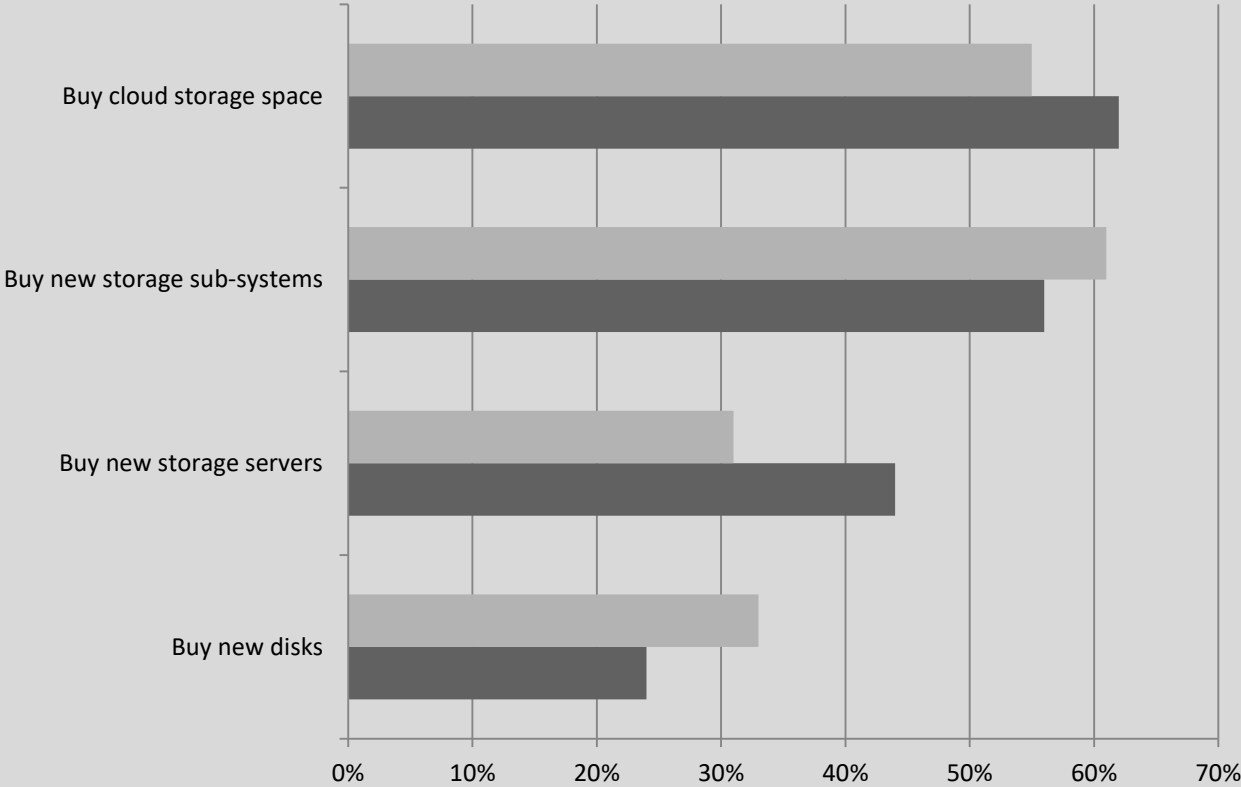
What are your top 3 priorities in storage (and data management) for 2020?



* classification, tiering, deduplication, DR...

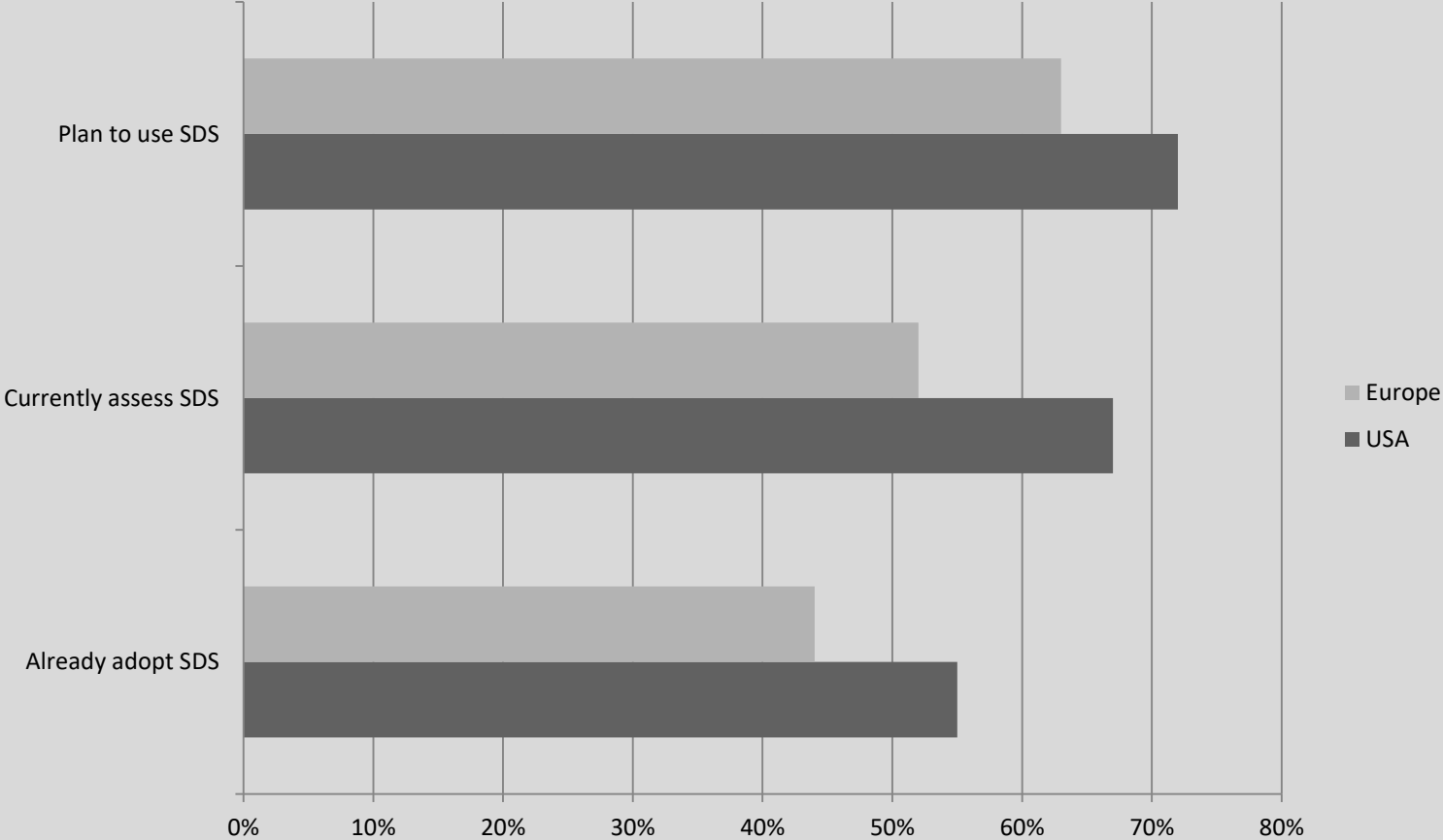
Question 3

How do you address storage capacity needs?



Question 4

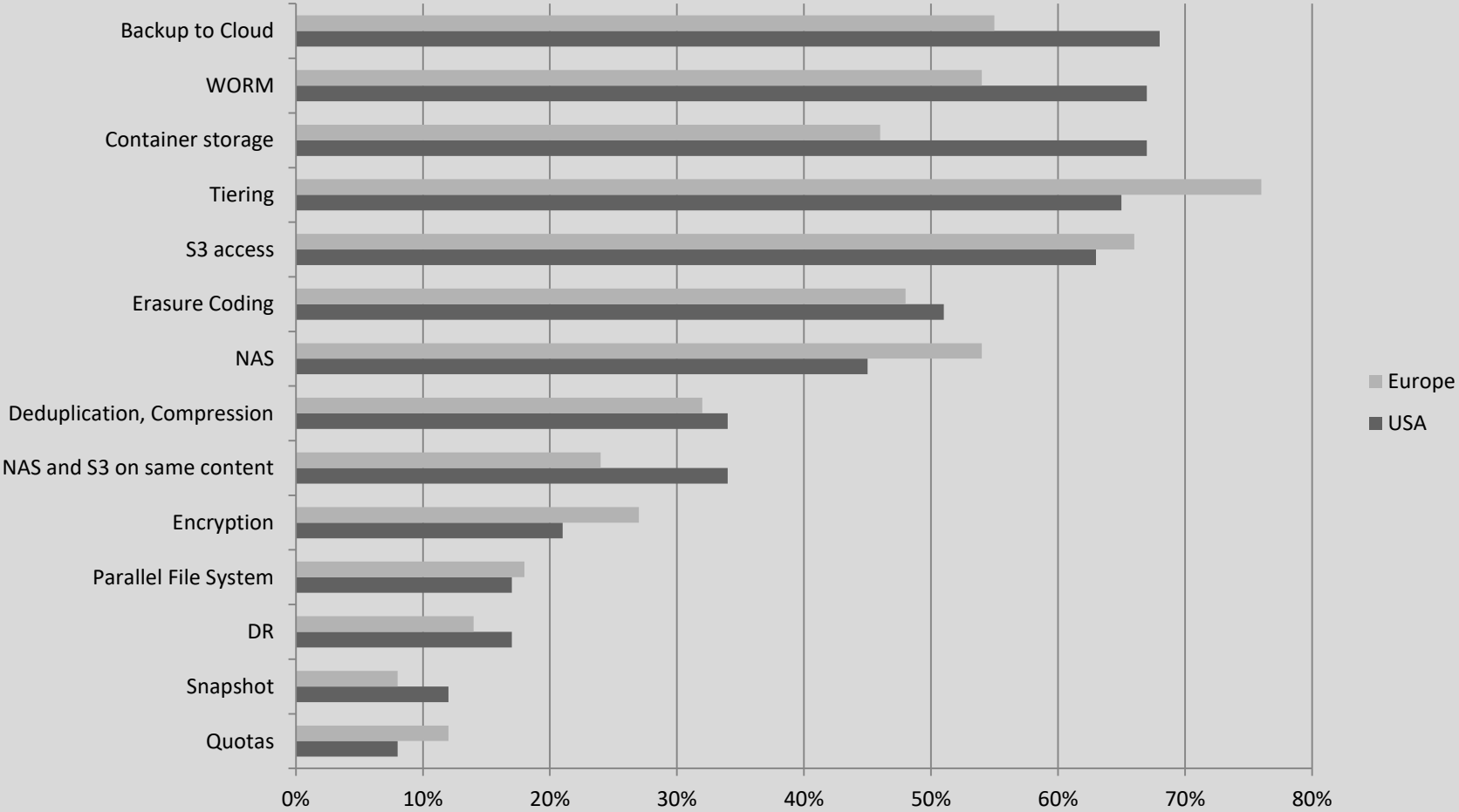
Did you adopt, currently asses or plan to use a SDS* solution?



* Software-Defined Storage

Question 5

What are the features* you need and think you will deploy in 2020?

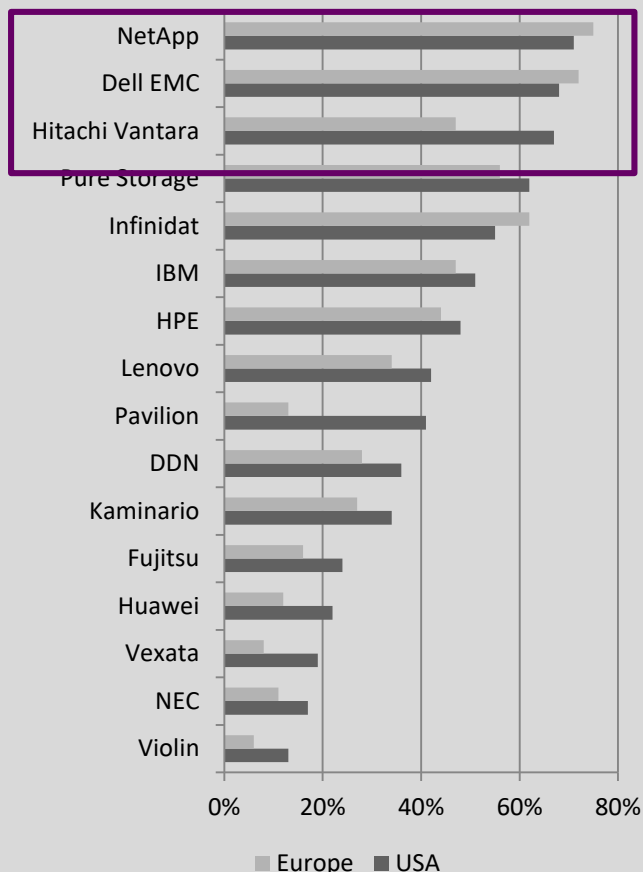


* for Storage and Data Management

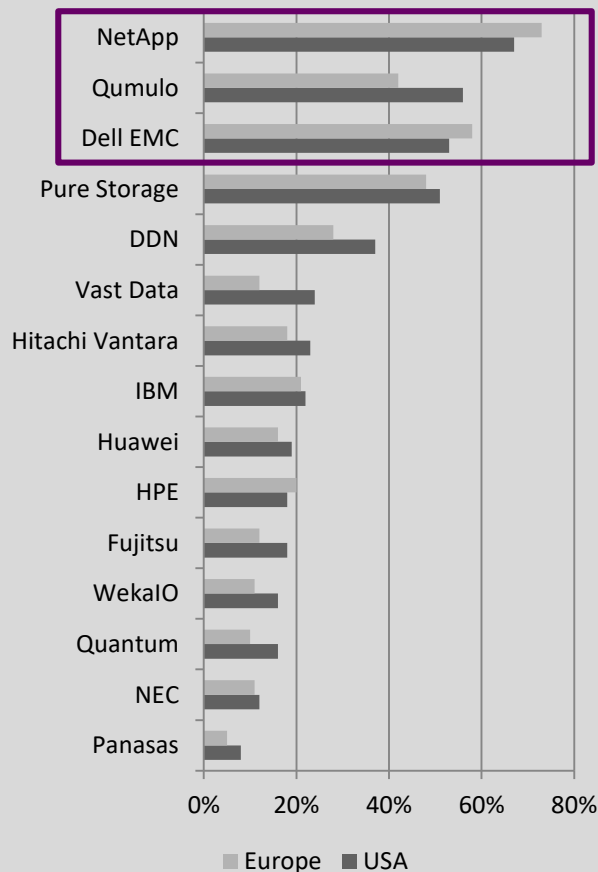
Question 6

What are the top 3 brands you will consider in block, file and object storage in 2020?

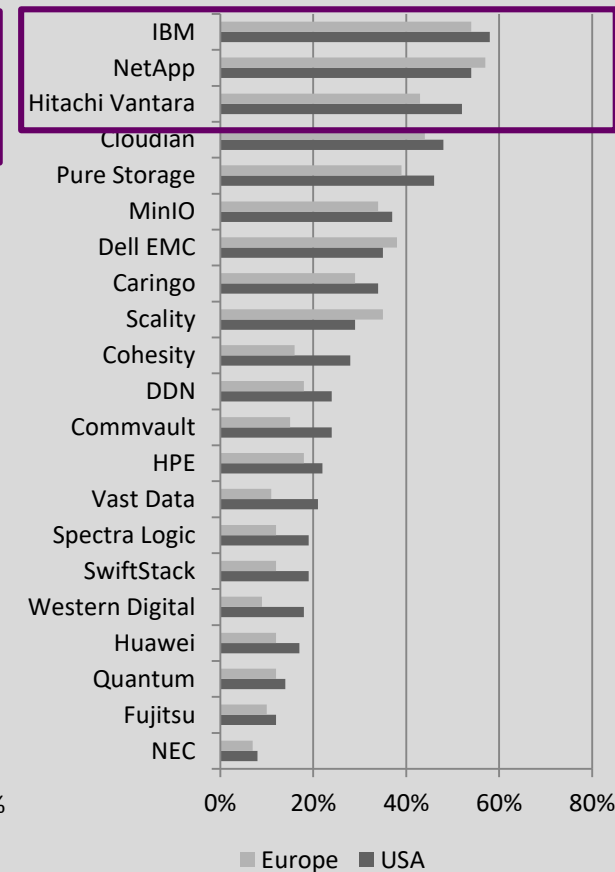
Block Storage



File Storage

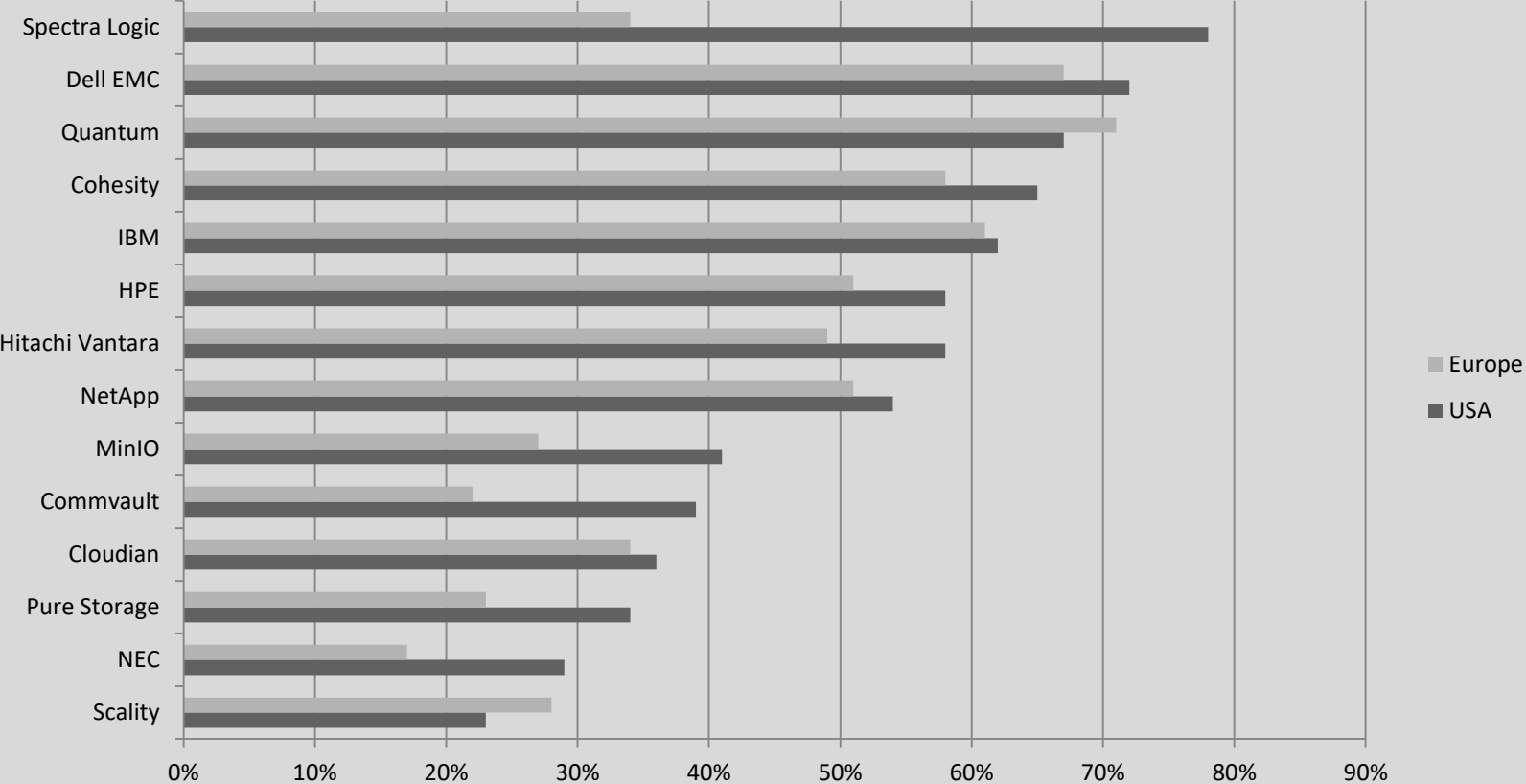


Object Storage



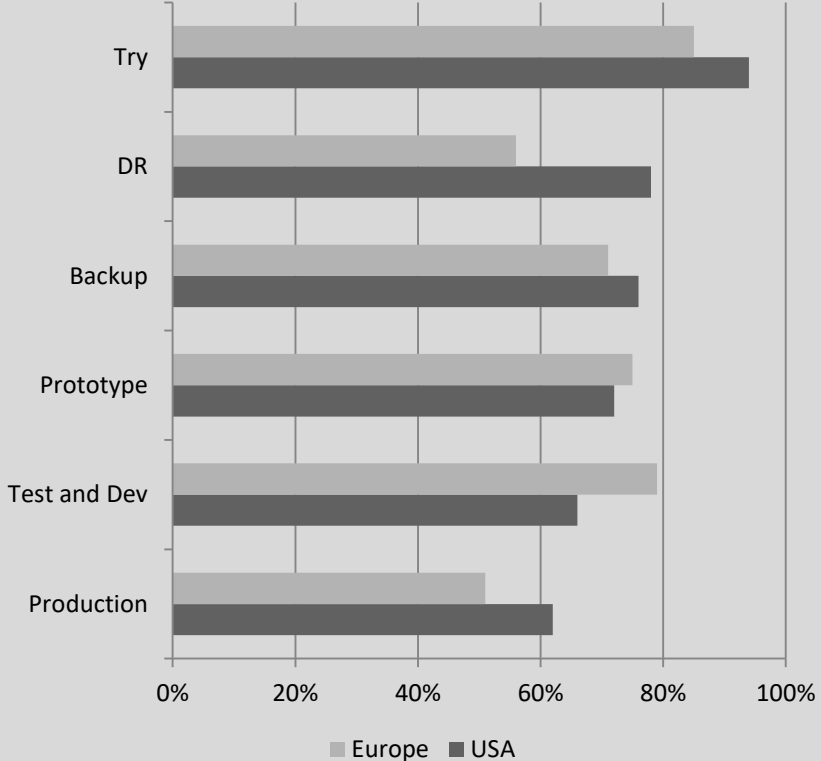
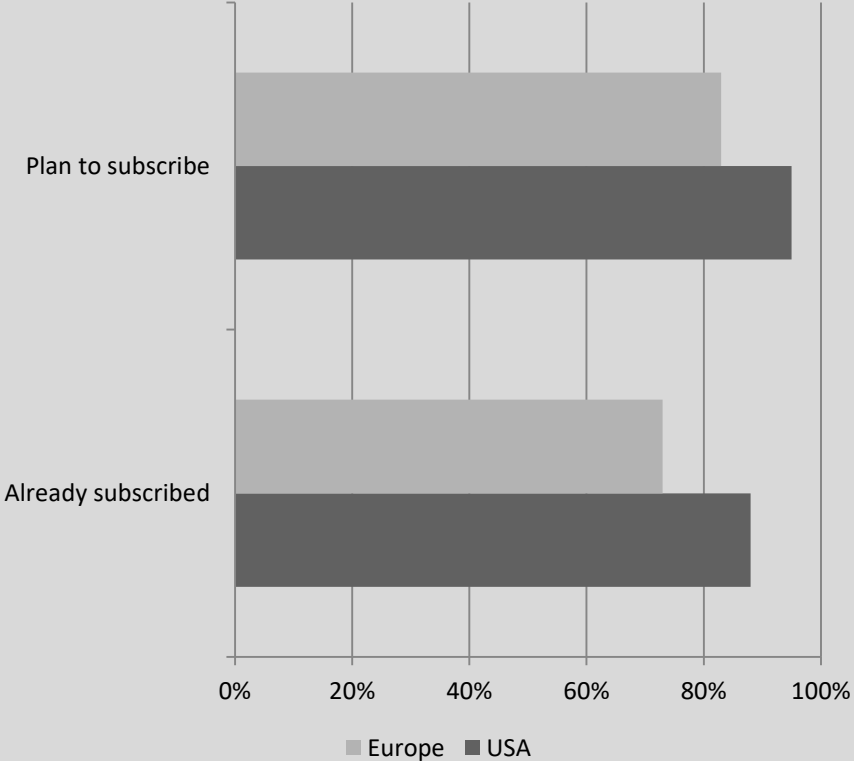
Question 7

What are the top 3 brands you will consider in secondary storage in 2020?



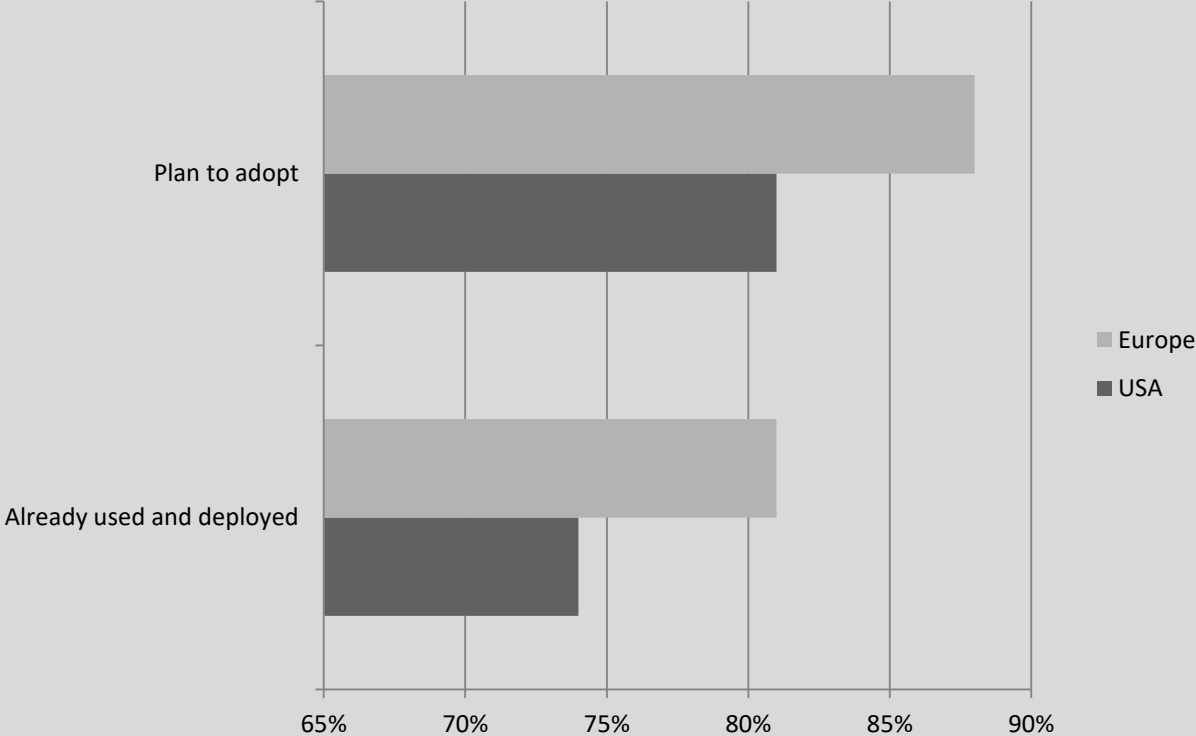
Question 8

Do you use cloud storage service? What for?



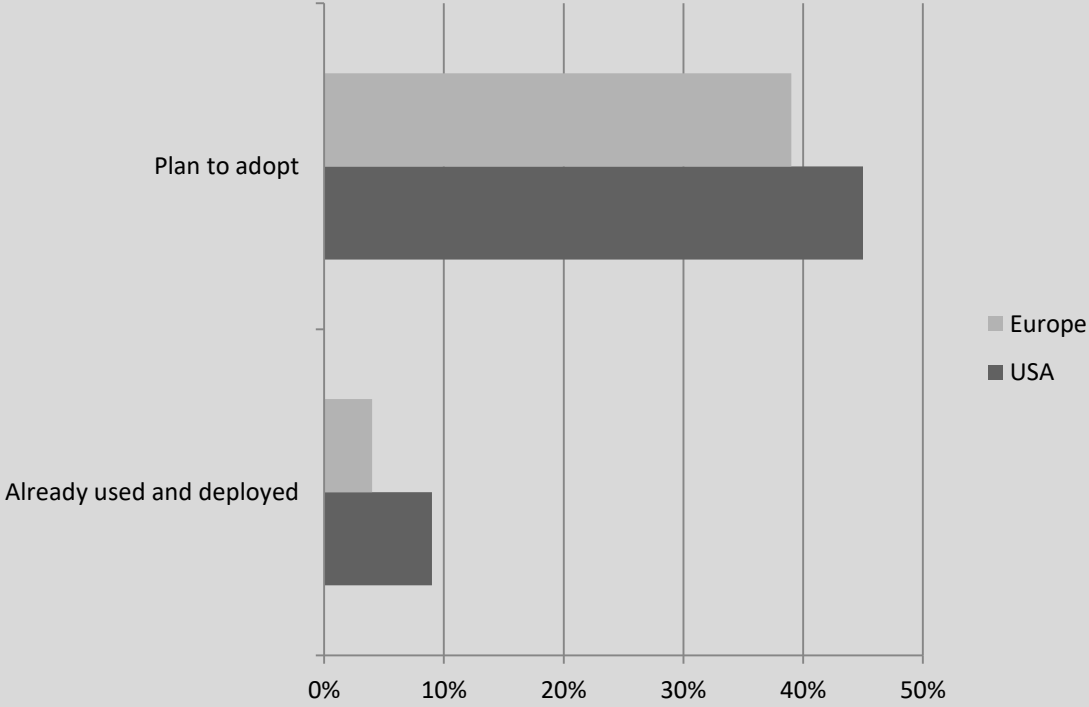
Question 9

Do you use open source storage solution?

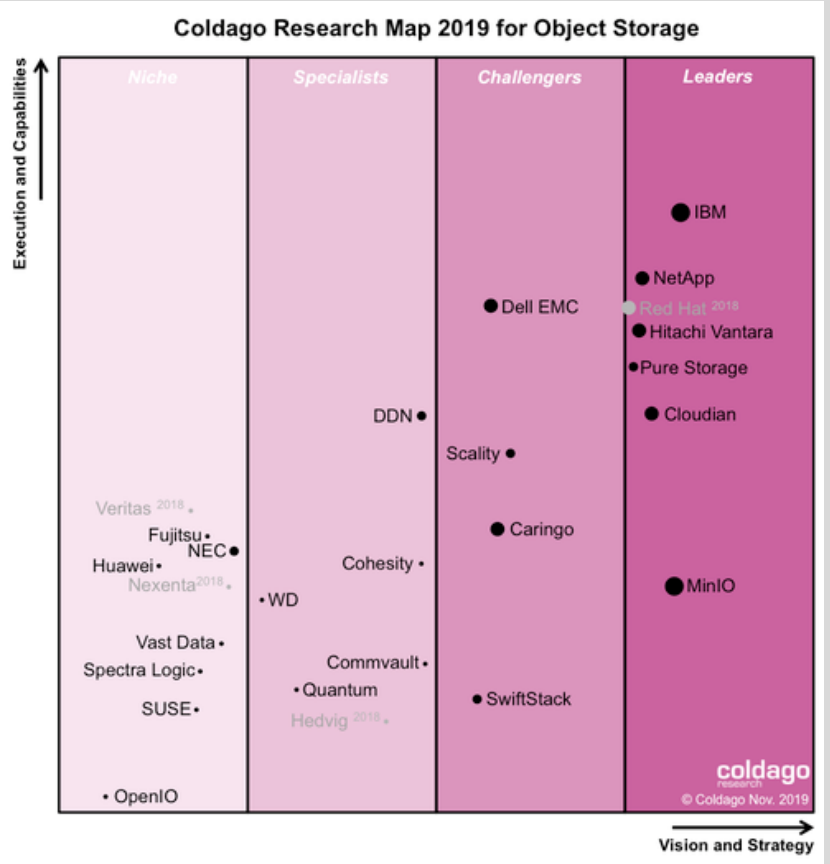
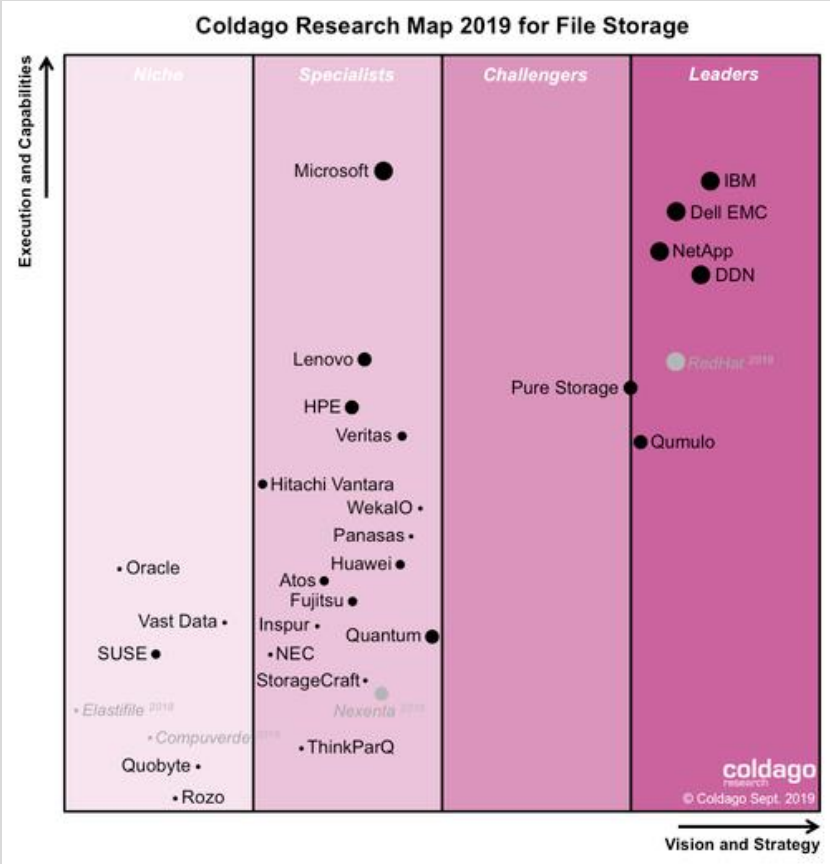


Question 10

Do you use or plan to use Persistent Memory?



The Maps



STORAGE UNICORN

DECEMBER 2019 **coldago**

Infrastructure, Data and Storage Management

Acronis actifio Barracuda COHESITY

DDN STORAGE druva INFINIDAT Kaseya

Qumulo rubrik VEEAM VERITAS

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Conclusion

- We anticipate a dense year with new products, companies confirmation, IPOs and of course M&As
- Directions and Topics to follow
 - Cloud in all dimensions
 - Kubernetes and Storage for Container
 - File and Object Storage (unstructured data)
 - NVMe and NVMe over Fabrics w/ disaggregated architectures
 - SCM/Persistent Memory, QLC
 - SaaS, Security, Analytics and AI

Contact pnicolas@coldago.com or pnicolas@storagenewsletter.com