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Email Storage Market, 2009-2013

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SCOPE

This study provides an analysis of the on-premises Email Storage market in 2009 and its potential growth over the next four years. It provides a detailed analysis of market trends, market size, market share by vendor, forecasts, as well as vendor products and strategies.

This report covers only on-premises Email Storage devices, and excludes high-end clustered storage devices that are typically used for other specialized transactions.

Throughout this report, installed base refers to number of device units sold and still in operation. The term “unit” is used to denote a single device.

All market numbers, such as market size, forecasts, installed base, revenue information and any financial information presented in this study represent worldwide figures, unless otherwise indicated. All financial figures are expressed in USD (\$).

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of information collected from vendors, and users within global corporations via interviews and surveys.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

EXECUTIVE SUMMARY

- This report provides an analysis of the main trends in the on-premises Email Storage market. Leading on-premises email platforms in use by organizations today, include: IBM Lotus Notes/Domino, Microsoft Exchange Server, Novell GroupWise, as well as a many other platforms from a variety of other vendors.
- Email remains the prime method of communication for enterprises of all types. Email usage continues to grow, fueled by the increase in users, as well as higher volumes of email per user. The size of emails is also growing as many emails today comprise HTML, audio, video, and images. All of these factors further drive the need for email storage capacity:
 - Based on our research an average company of 1,000 users, will use an average of 20 Gigabytes per day of storage, which translates into 100 GB per week, or 400 GB per month.
- All organizations, today, recognize that the need to offload email from their email servers and on to storage devices is essential to ensure efficient, long term storage capacity. Previously the domain of the Large Enterprise, email storage devices are now also becoming a necessity for Small and Medium businesses, which also need to deal with ever increasing email volumes.
- This study looks at the adoption of email storage devices across three segments:
 - Small Enterprises – with less than 100 active email users.
 - Medium Enterprises – with 100 to 1,000 active email users.
 - Large Enterprises – with over 1,000 active email users.

- Storage device vendors have continued to provide higher levels of storage capacity at markedly lower price points over time. As a result, increased storage device capacity is now available at lower price points for the Small Enterprise segment, whereas previously the same level of storage capacity would have been available only for Large Enterprises with specialized IT departments and significant in-house technical skills.
- The introduction of Internet Small Computer Systems Interface (iSCSI) based IP SAN protocols, has allowed Small and Medium Enterprises to use their existing IT skills without the need for specialist IT support staff with knowledge of Fibre Channel (FC) technology. As a result, iSCSI storage devices are seeing steady growth in sales within the Small and Medium Enterprise segments, whilst FC-based storage devices continue to enjoy a strong installed base mainly within Large Enterprises, which have skilled IT support staff.
- Management processes are becoming increasingly important. Many organizations use Storage Resource Management (SRM) tools as a means to manage and monitor storage more efficiently for increased usage and capacity savings, as an alternative to purchasing new hardware devices.
- Clustering and virtualization are being adopted for high-end IP SAN storage devices by Large Enterprises. This trend towards server virtualization allows for improved utilization of storage across a range of devices.
- Organizations are also increasingly looking to consolidate their storage devices in order to reduce costs. Vendors are responding to this trend by developing Unified Storage, which can support multiple types of data blocks and network protocols (including FC, iSCSI and Fibre Channel over Ethernet) in the same storage array. Unified Storage provides the user with a single view of storage applications, and it also allows storage service levels to be set with policy-based management according to the importance of the application.
- All storage vendors are seeking to offer a data deduplication service as part of their storage device offerings. Data deduplication allows organizations to use storage space more efficiently and reduce the amount of total storage required.

- Figure 1, below, shows the revenue forecast growth for all three segments of the Email Storage device market from 2009 to 2013.

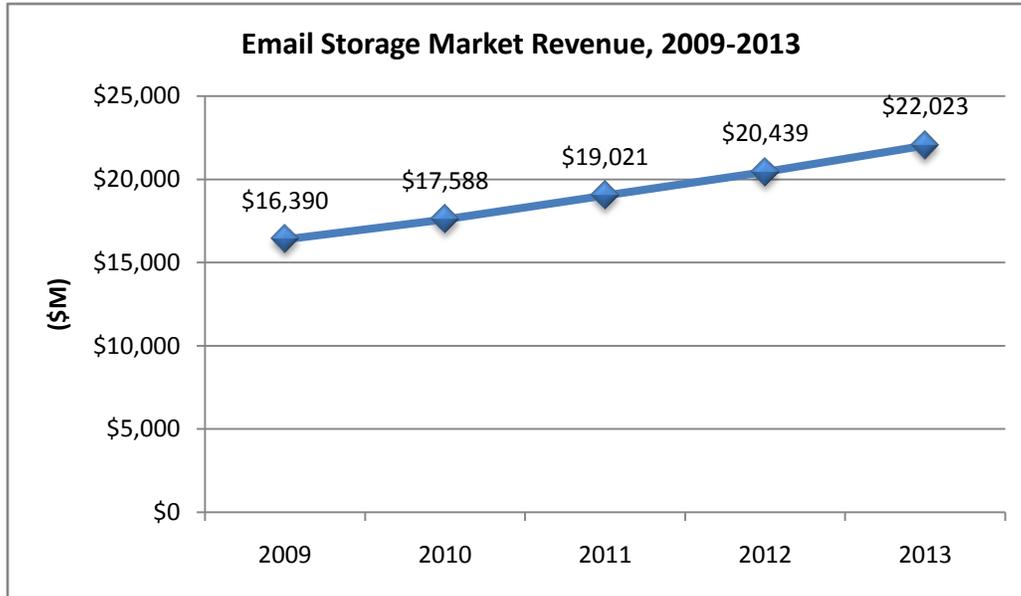


Figure 1: Email Storage Device Market Revenue (\$M), 2009-2013

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