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Global Ethernet Storage Fabric Market Size Study & Forecast, by Device (Switches and Adapters), by Switching Port (10 GbE to 25 GbE and 100 GbE and Above), by Storage Type (Block Storage and Hyper-Converged Infrastructure), by Automation (Enterprise Data Center) and Regional Forecasts 2025–2035

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Abstracts

The Global Ethernet Storage Fabric Market is valued at approximately USD 2.18 billion in 2024 and is expected to expand at a remarkable CAGR of 12.70% over the forecast period 2025–2035. Ethernet Storage Fabric (ESF) is a high-performance network architecture designed to connect servers and storage systems using Ethernet technology to deliver low-latency, high-throughput data transmission. Unlike traditional storage networking methods, ESF integrates the agility of Ethernet with the scalability of cloud computing to handle massive data workloads efficiently. The surge in data-intensive applications, the exponential growth of cloud infrastructure, and the rising adoption of virtualization technologies are driving the demand for Ethernet-based storage networks. Furthermore, the increasing reliance on real-time analytics, IoT ecosystems, and AI-powered enterprise frameworks continues to strengthen the market’s growth trajectory globally.

As organizations undergo digital transformation, their storage demands are evolving rapidly, compelling them to upgrade from legacy network frameworks to agile, scalable Ethernet storage architectures. The convergence of data center operations and the proliferation of software-defined storage (SDS) systems are major catalysts fueling this transition. According to IDC, global data creation is projected to exceed 180 zettabytes by 2025, underscoring the need for advanced, high-bandwidth storage connectivity. Ethernet Storage Fabric solutions are being embraced across diverse industries for their

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ability to enhance interoperability, simplify management, and optimize total cost of ownership. However, despite these promising opportunities, the high initial setup cost, coupled with challenges in interoperability with legacy systems, may hinder seamless adoption, particularly among small and medium-sized enterprises during the forecast period.

The detailed segments and sub-segments included in the report are:

By Device:

Switches

Adapters

By Switching Port:

10 GbE to 25 GbE

100 GbE and Above

By Storage Type:

Block Storage

Hyper-Converged Infrastructure

By Automation:

Enterprise Data Center

By Region:

North America

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- Canada

Europe

- UK
- Germany
- France
- Spain
- Italy
- ROE

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea
- RoAPAC

Latin America

- Brazil
- Mexico

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Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Switches Segment Expected to Dominate the Market

Switches represent the cornerstone of the Ethernet Storage Fabric ecosystem and are expected to dominate the market throughout the forecast period. The segment's supremacy can be attributed to its pivotal role in connecting multiple servers and storage nodes while maintaining high-speed, loss-less data transmission. As enterprises strive for scalability and reduced latency, next-generation Ethernet switches supporting 100 GbE and above are becoming essential. Moreover, the advent of cloud-native architectures, edge computing, and AI-driven automation is increasing the deployment of programmable Ethernet switches that deliver intelligent traffic management. Although switches remain the dominant force, adapters are poised for significant growth due to their integral function in bridging servers with fabric switches, improving bandwidth efficiency and operational reliability.

100 GbE and Above Port Category Leads in Revenue Contribution

Among switching ports, the 100 GbE and above segment currently generates the largest revenue share. This dominance stems from the ongoing migration toward high-speed data centers and the unprecedented expansion of hyperscale computing facilities. As businesses handle massive datasets and virtual workloads, 100 GbE and 400 GbE ports are becoming the gold standard for high-performance networking. These ports not only ensure higher throughput but also facilitate reduced packet loss and enhanced latency control. Conversely, 10 GbE to 25 GbE ports are gaining traction among mid-sized enterprises seeking cost-efficient scalability without overhauling their infrastructure. This dual-speed ecosystem is shaping a balanced yet progressive competitive environment within the ESF landscape.

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The Global Ethernet Storage Fabric Market exhibits strong regional diversity. North America dominates the market in 2025, buoyed by the presence of major cloud service providers, early technology adoption, and substantial investments in data-center modernization. The region's robust ecosystem of software-defined networking (SDN) vendors and hyperscale enterprises further amplifies the uptake of ESF solutions. Europe follows closely, driven by the region's strong focus on digital transformation initiatives and growing adoption of hybrid cloud frameworks. Meanwhile, Asia Pacific is projected to be the fastest-growing region during 2025–2035, propelled by the rapid expansion of enterprise IT infrastructure in countries such as China, India, and South Korea. The surge in 5G deployment, industrial automation, and the proliferation of local data centers in this region are expected to unlock vast opportunities for ESF providers. Latin America and the Middle East & Africa are also poised for notable expansion, supported by government-backed smart city programs and growing cloud connectivity initiatives.

Major market players included in this report are:

Cisco Systems Inc.

Broadcom Inc.

Dell Technologies Inc.

Hewlett Packard Enterprise Development LP

Intel Corporation

Juniper Networks Inc.

Arista Networks Inc.

Mellanox Technologies Ltd. (NVIDIA Corporation)

Huawei Technologies Co., Ltd.

Fujitsu Limited

Extreme Networks Inc.

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Lenovo Group Limited

Microchip Technology Inc.

Super Micro Computer Inc.

QLogic Corporation

Global Ethernet Storage Fabric Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast Period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments and countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

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Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand-side and supply-side analysis of the market

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CHAPTER 10. COMPETITIVE INTELLIGENCE

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