

Global Storage Area Network (SAN) Hardware Market - Technologies and Applications

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Abstracts

Global Storage Area Network (SAN) Hardware Market Trends and Outlook

The global Storage Area Network (SAN) hardware market reached approximately US\$11.6 billion in 2024 and is projected to exceed US\$16.6 billion by 2030, expanding at a CAGR of 6.1%. Growth is being propelled by relentless enterprise data expansion, ultra-low-latency workload requirements, and the transition to flash-optimized and NVMe-over-Fabrics (NVMe-oF) architectures. As digital transformation and compliance pressures intensify across industries, SAN hardware remains essential infrastructure for mission-critical environments, especially in sectors like banking, telecom, and healthcare.

While traditional Fiber Channel-based systems still dominate, the market is rapidly evolving. Vendors are introducing NVMe-ready arrays, high-speed HBAs, and software-defined SAN components to address the increasing performance demands of AI, big data, and cloud-native workloads. Regional momentum is shifting as well, North America remains the largest market, supported by enterprise refresh cycles and hyperscale investments, while Asia-Pacific is the fastest-growing, fueled by cloud-first strategies, fintech expansion, and infrastructure modernization in China, India, and Southeast Asia.

Leading players in this market include Dell Technologies, Hewlett Packard Enterprise (HPE), IBM, NetApp, Cisco, Pure Storage, and Huawei. These vendors are expanding their SAN portfolios with software-defined overlays, NVMe support, and modular deployment models to remain competitive in a market shaped by hyperscale disaggregation and evolving enterprise demands.

Storage Area Network (SAN) Hardware Regional Market Analysis

In 2024, North America is leading all regions at 36.3% of total global SAN hardware market. This dominance is driven by entrenched Fiber Channel infrastructure, hyperscale cloud deployments, and regulatory-heavy verticals such as financial services and healthcare. Europe followed, benefiting from ongoing refresh cycles and growing adoption of software-defined SAN overlays, particularly in the public and industrial sectors. The Asia-Pacific region is poised to be the fastest-growing market, expanding at a CAGR of 8.1% to exceed US\$5 billion by 2030. This rapid growth is underpinned by increasing hyperscale investments, cloud-first enterprise strategies in China and India, and broader adoption of NVMe-over-Fabrics among fintech and digital-native organizations.

Storage Area Network (SAN) Hardware Market Analysis by Technology

As of 2024, Fiber Channel switches were the largest technology segment, cornering nearly 41.4% of global SAN hardware revenues. This dominance is anchored in mature markets such as North America and Europe, where enterprises, particularly in government, healthcare, and financial services, continue to favor Fiber Channel for its reliability, low-latency performance, and robust security. Fiber Channel Over Ethernet (FCoE) followed closely, reflecting steady upgrades from 16 Gbps to 64 Gbps as throughput demands intensify. Looking forward, InfiniBand is expected to be the fastest-growing technology, expanding at a CAGR of 6.7%. This growth is being driven by its increasing deployment in AI and high-performance computing (HPC) environments, where ultra-low-latency and high-bandwidth interconnects are critical. The second-fastest growing segment is Fiber Channel switches, sustained by refresh cycles and hybrid SAN adoption across regulated industries.

Storage Area Network (SAN) Hardware Market Analysis by Deployment Type

Hyperscale deployments dominated the global SAN hardware market, generating approximately 77.5% of total revenues in 2024. This overwhelming share is fueled by hyperscalers' relentless investments in disaggregated infrastructure, flash-optimized NVMe systems, and proprietary orchestration software. Large-scale cloud providers continue to prioritize modular, performance-optimized SAN hardware to support AI/ML workloads and petabyte-scale data pipelines. In contrast, the enterprise segment, though smaller in 2024, is projected to be the fastest-growing, expanding at a CAGR of 7.1%. Growth is being driven by digital transformation initiatives in sectors such as healthcare, banking, manufacturing, and government, where storage compliance, high

availability, and operational continuity are critical. Enterprises are increasingly embracing hybrid SAN configurations, blending on-prem performance with cloud agility via software-defined overlays.

Storage Area Network (SAN) Hardware Market Analysis by Company Type

In 2024, large enterprises represented the largest end-user category, contributing around 66% of global SAN hardware revenues. These organizations, often operating across highly regulated and data-intensive verticals such as banking, telecom, and healthcare, continue to invest heavily in robust SAN infrastructure to support critical workloads, ensure compliance, and maintain operational resilience. Their requirements typically include deterministic performance, advanced Fiber Channel connectivity, and pre-validated hardware-software stacks. However, small and mid-sized enterprises (SMEs) are projected to be the fastest-growing customer segment, expanding at a CAGR of 7.1%. This growth reflects increasing SAN adoption by digitally maturing SMEs in Asia-Pacific, Latin America, and Eastern Europe, many of whom are turning to modular, cost-effective SAN setups that support cloud-native integration and remote scalability. As these companies modernize IT infrastructure, demand is rising for NVMe-powered arrays, Ethernet-based iSCSI SANs, and software-defined storage compatibility.

Storage Area Network (SAN) Hardware Market Analysis by Industry Sector

The banking, financial services, and insurance (BFSI) sector led global SAN hardware spending, generating 21.5% of total market revenue in 2024. This dominance is driven by the sector's stringent regulatory mandates, need for auditability, and demand for deterministic performance, especially for transaction-heavy systems and risk analytics workloads. Financial institutions are at the forefront of Fiber Channel upgrades and NVMe-over-Fabrics deployment to meet real-time data access needs. The IT & telecom sector was the second largest segment in 2024, reflecting high SAN hardware consumption by data center operators, managed service providers, and cloud infrastructure vendors. However, it is also poised to be the fastest-growing industry sector, expanding at a CAGR of 7.8%. This acceleration is fueled by edge expansion, 5G rollouts, and the increasing use of AI-native applications across telecom infrastructure, all of which require scalable, high-throughput storage systems.

Storage Area Network (SAN) Hardware Market Report Scope

This global report on Storage Area Network (SAN) Hardware market analyzes the

global and regional market based on Technology, Deployment Type, Company Type and Industry Sector for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2024

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 20+

Storage Area Network (SAN) Hardware Market by Geographic Region

North America (The United States, Canada and Mexico)

Europe (Germany, the United Kingdom, France, Italy, the Netherlands, Spain, Russia, Switzerland and Rest of Europe)

Asia-Pacific (China, Japan, India, Australia, Singapore, South Korea and Rest of Asia-Pacific)

South America (Brazil, Argentina, Colombia, Chile, Peru and Rest of South America)

Middle East & Africa (the United Arab Emirates, South Africa, Egypt, Saudi Arabia, Morocco, Kuwait, Qatar and Rest of Middle East & Africa)

Storage Area Network (SAN) Hardware Market by Technology

Fiber Channel (FC)

Fiber Channel Over Ethernet (FCoE)

InfiniBand

iSCSI Protocol

Storage Area Network (SAN) Hardware Market by Deployment Type

Hypercscale Server SAN

Enterprise Server SAN

Storage Area Network (SAN) Hardware Market by Company Type

Large Enterprises

SMEs

Storage Area Network (SAN) Hardware Market by Industry Sector

Banking, Financial Services, and Insurance (BFSI)

IT & Telecom

Manufacturing

Government

Healthcare

Retail & Ecommerce

Energy & Utilities

Transportation

Education

Other Industry Sectors

Contents

PART A: GLOBAL MARKET PERSPECTIVE

1. EXECUTIVE SUMMARY

A Roundup on Storage Area Network (SAN) Hardware
Market Segmentation for Storage Area Network (SAN) Hardware
Technologies
Deployment Types
Company Types
Industry Sectors
Key Trends in Storage Area Network (SAN) Hardware Market

2. INDUSTRY LANDSCAPE

Global Storage Area Network (SAN) Hardware Market Outlook
Comprehensive Storage Area Network (SAN) Hardware Industry Analysis - Growth Drivers and Inhibitors
Growth Drivers
Growth Inhibitors
Market Entry Strategies for Storage Area Network (SAN) Hardware Industry
Startup Strategies for Storage Area Network (SAN) Hardware Industry
SWOT Analysis of Storage Area Network (SAN) Hardware Industry
Strengths
Weaknesses
Opportunities
Threats
Porter's Five Forces Analysis
PESTEL Analysis

3. COMPETITIVE LANDSCAPE

Market Positioning of Key Storage Area Network (SAN) Hardware Companies
Market Share Analysis of Storage Area Network (SAN) Hardware Companies
SWOT Analysis of Key Players in the Storage Area Network (SAN) Hardware Industry
Key Market Players
Cisco
Dell Technologies (Dell EMC)

Dell VxRail
Fujitsu
Hewlett Packard Enterprise (HPE)
Hitachi Vantara
HPE SimpliVity
Huawei
IBM
Infotrend
Lenovo
NEC
NetApp
Nutanix
Oracle
Pure Storage
Quantum
Seagate
Tintri (DDN)
Western Digital

4. KEY BUSINESS & PRODUCT TRENDS

5. GLOBAL MARKET OVERVIEW

Global Storage Area Network (SAN) Hardware Market Overview by Technology
Storage Area Network (SAN) Hardware Technology Market Overview by Global
Region

- Fiber Channel (FC)
- Fiber Channel Over Ethernet (FCoE)
- InfiniBand
- iSCSI Protocol

Global Storage Area Network (SAN) Hardware Market Overview by Deployment Type
Storage Area Network (SAN) Hardware Deployment Type Market Overview by Global
Region

- Hypercscale Server SAN
- Enterprise Server SAN

Global Storage Area Network (SAN) Hardware Market Overview by Company Type
Storage Area Network (SAN) Hardware Company Type Market Overview by Global
Region

- Large Enterprises

SMEs

Global Storage Area Network (SAN) Hardware Market Overview by Industry Sector

Storage Area Network (SAN) Hardware Industry Sector Market Overview by Global Region

Banking, Financial Services, and Insurance (BFSI)

IT & Telecom

Manufacturing

Government

Healthcare

Retail & Ecommerce

Energy & Utilities

Transportation

Education

Other Industry Sectors

PART B: REGIONAL MARKET PERSPECTIVE

Global Storage Area Network (SAN) Hardware Market Overview by Geographic Region

REGIONAL MARKET OVERVIEW

6. NORTH AMERICA

North American Storage Area Network (SAN) Hardware Market Overview by Geographic Region

North American Storage Area Network (SAN) Hardware Market Overview by Technology

North American Storage Area Network (SAN) Hardware Market Overview by Deployment Type

North American Storage Area Network (SAN) Hardware Market Overview by Company Type

North American Storage Area Network (SAN) Hardware Market Overview by Industry Sector

Country-wise Analysis of North American Storage Area Network (SAN) Hardware Market

THE UNITED STATES

United States Storage Area Network (SAN) Hardware Market Overview by Technology

United States Storage Area Network (SAN) Hardware Market Overview by

Deployment Type

United States Storage Area Network (SAN) Hardware Market Overview by Company Type

United States Storage Area Network (SAN) Hardware Market Overview by Industry Sector

CANADA

Canadian Storage Area Network (SAN) Hardware Market Overview by Technology
Canadian Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Canadian Storage Area Network (SAN) Hardware Market Overview by Company Type

Canadian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

MEXICO

Mexican Storage Area Network (SAN) Hardware Market Overview by Technology
Mexican Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Mexican Storage Area Network (SAN) Hardware Market Overview by Company Type
Mexican Storage Area Network (SAN) Hardware Market Overview by Industry Sector

7. EUROPE

European Storage Area Network (SAN) Hardware Market Overview by Geographic Region

European Storage Area Network (SAN) Hardware Market Overview by Technology
European Storage Area Network (SAN) Hardware Market Overview by Deployment Type

European Storage Area Network (SAN) Hardware Market Overview by Company Type
European Storage Area Network (SAN) Hardware Market Overview by Industry Sector
Country-wise Analysis of European Storage Area Network (SAN) Hardware Market

GERMANY

German Storage Area Network (SAN) Hardware Market Overview by Technology
German Storage Area Network (SAN) Hardware Market Overview by Deployment Type

German Storage Area Network (SAN) Hardware Market Overview by Company Type
German Storage Area Network (SAN) Hardware Market Overview by Industry Sector

THE UNITED KINGDOM

United Kingdom Storage Area Network (SAN) Hardware Market Overview by Technology

United Kingdom Storage Area Network (SAN) Hardware Market Overview by
Deployment Type

United Kingdom Storage Area Network (SAN) Hardware Market Overview by
Company Type

United Kingdom Storage Area Network (SAN) Hardware Market Overview by Industry
Sector

FRANCE

French Storage Area Network (SAN) Hardware Market Overview by Technology

French Storage Area Network (SAN) Hardware Market Overview by Deployment
Type

French Storage Area Network (SAN) Hardware Market Overview by Company Type

French Storage Area Network (SAN) Hardware Market Overview by Industry Sector

ITALY

Italian Storage Area Network (SAN) Hardware Market Overview by Technology

Italian Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Italian Storage Area Network (SAN) Hardware Market Overview by Company Type

Italian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

THE NETHERLANDS

Dutch Storage Area Network (SAN) Hardware Market Overview by Technology

Dutch Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Dutch Storage Area Network (SAN) Hardware Market Overview by Company Type

Dutch Storage Area Network (SAN) Hardware Market Overview by Industry Sector

SPAIN

Spanish Storage Area Network (SAN) Hardware Market Overview by Technology

Spanish Storage Area Network (SAN) Hardware Market Overview by Deployment
Type

Spanish Storage Area Network (SAN) Hardware Market Overview by Company Type

Spanish Storage Area Network (SAN) Hardware Market Overview by Industry Sector

RUSSIA

Russian Storage Area Network (SAN) Hardware Market Overview by Technology

Russian Storage Area Network (SAN) Hardware Market Overview by Deployment
Type

Russian Storage Area Network (SAN) Hardware Market Overview by Company Type

Russian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

SWITZERLAND

Swiss Storage Area Network (SAN) Hardware Market Overview by Technology

Swiss Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Swiss Storage Area Network (SAN) Hardware Market Overview by Company Type

Swiss Storage Area Network (SAN) Hardware Market Overview by Industry Sector

REST OF EUROPE

Rest of Europe Storage Area Network (SAN) Hardware Market Overview by Technology

Rest of Europe Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Rest of Europe Storage Area Network (SAN) Hardware Market Overview by Company Type

Rest of Europe Storage Area Network (SAN) Hardware Market Overview by Industry Sector

8. ASIA-PACIFIC

Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by Geographic Region

Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by Technology

Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by Company Type

Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by Industry Sector

Country-wise Analysis of Asia-Pacific Storage Area Network (SAN) Hardware Market
CHINA

Chinese Storage Area Network (SAN) Hardware Market Overview by Technology

Chinese Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Chinese Storage Area Network (SAN) Hardware Market Overview by Company Type

Chinese Storage Area Network (SAN) Hardware Market Overview by Industry Sector

JAPAN

Japanese Storage Area Network (SAN) Hardware Market Overview by Technology

Japanese Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Japanese Storage Area Network (SAN) Hardware Market Overview by Company Type

Japanese Storage Area Network (SAN) Hardware Market Overview by Industry Sector

INDIA

Indian Storage Area Network (SAN) Hardware Market Overview by Technology

Indian Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Indian Storage Area Network (SAN) Hardware Market Overview by Company Type
Indian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

AUSTRALIA

Australia Storage Area Network (SAN) Hardware Market Overview by Technology
Australia Storage Area Network (SAN) Hardware Market Overview by Deployment

Type

Australia Storage Area Network (SAN) Hardware Market Overview by Company Type
Australia Storage Area Network (SAN) Hardware Market Overview by Industry Sector

SINGAPORE

Singaporean Storage Area Network (SAN) Hardware Market Overview by
Technology

Singaporean Storage Area Network (SAN) Hardware Market Overview by
Deployment Type

Singaporean Storage Area Network (SAN) Hardware Market Overview by Company
Type

Singaporean Storage Area Network (SAN) Hardware Market Overview by Industry
Sector

SOUTH KOREA

South Korean Storage Area Network (SAN) Hardware Market Overview by
Technology

South Korean Storage Area Network (SAN) Hardware Market Overview by
Deployment Type

South Korean Storage Area Network (SAN) Hardware Market Overview by Company
Type

South Korean Storage Area Network (SAN) Hardware Market Overview by Industry
Sector

REST OF ASIA-PACIFIC

Rest of Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by
Technology

Rest of Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by
Deployment Type

Rest of Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by
Company Type

Rest of Asia-Pacific Storage Area Network (SAN) Hardware Market Overview by
Industry Sector

9. SOUTH AMERICA

South American Storage Area Network (SAN) Hardware Market Overview by

Geographic Region

South American Storage Area Network (SAN) Hardware Market Overview by Technology

South American Storage Area Network (SAN) Hardware Market Overview by Deployment Type

South American Storage Area Network (SAN) Hardware Market Overview by Company Type

South American Storage Area Network (SAN) Hardware Market Overview by Industry Sector

Country-wise Analysis of South American Storage Area Network (SAN) Hardware Market

BRAZIL

Brazilian Storage Area Network (SAN) Hardware Market Overview by Technology

Brazilian Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Brazilian Storage Area Network (SAN) Hardware Market Overview by Company Type

Brazilian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

ARGENTINA

Argentine Storage Area Network (SAN) Hardware Market Overview by Technology

Argentine Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Argentine Storage Area Network (SAN) Hardware Market Overview by Company Type

Type

Argentine Storage Area Network (SAN) Hardware Market Overview by Industry Sector

Sector

COLOMBIA

Colombian Storage Area Network (SAN) Hardware Market Overview by Technology

Colombian Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Colombian Storage Area Network (SAN) Hardware Market Overview by Company Type

Type

Colombian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

Sector

CHILE

Chilean Storage Area Network (SAN) Hardware Market Overview by Technology

Chilean Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Chilean Storage Area Network (SAN) Hardware Market Overview by Company Type

Chilean Storage Area Network (SAN) Hardware Market Overview by Industry Sector

PERU

Peruvian Storage Area Network (SAN) Hardware Market Overview by Technology

Peruvian Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Peruvian Storage Area Network (SAN) Hardware Market Overview by Company Type

Peruvian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

REST OF SOUTH AMERICA

Rest of South America Storage Area Network (SAN) Hardware Market Overview by Technology

Rest of South America Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Rest of South America Storage Area Network (SAN) Hardware Market Overview by Company Type

Rest of South America Storage Area Network (SAN) Hardware Market Overview by Industry Sector

10. MIDDLE EAST & AFRICA

Middle East & Africa Storage Area Network (SAN) Hardware Market Overview by Geographic Region

Middle East & Africa Storage Area Network (SAN) Hardware Market Overview by Technology

Middle East & Africa Storage Area Network (SAN) Hardware Market Overview by Deployment Type

Middle East & Africa Storage Area Network (SAN) Hardware Market Overview by Company Type

Middle East & Africa Storage Area Network (SAN) Hardware Market Overview by Industry Sector

Country-wise Analysis of Middle East & Africa Storage Area Network (SAN) Hardware Market

THE UNITED ARAB EMIRATES

United Arab Emirates Storage Area Network (SAN) Hardware Market Overview by Technology

United Arab Emirates Storage Area Network (SAN) Hardware Market Overview by Deployment Type

United Arab Emirates Storage Area Network (SAN) Hardware Market Overview by Company Type

United Arab Emirates Storage Area Network (SAN) Hardware Market Overview by Industry Sector

SOUTH AFRICA

South African Storage Area Network (SAN) Hardware Market Overview by
Technology

South African Storage Area Network (SAN) Hardware Market Overview by
Deployment Type

South African Storage Area Network (SAN) Hardware Market Overview by Company
Type

South African Storage Area Network (SAN) Hardware Market Overview by Industry
Sector

EGYPT

Egyptian Storage Area Network (SAN) Hardware Market Overview by Technology

Egyptian Storage Area Network (SAN) Hardware Market Overview by Deployment
Type

Egyptian Storage Area Network (SAN) Hardware Market Overview by Company Type

Egyptian Storage Area Network (SAN) Hardware Market Overview by Industry Sector

SAUDI ARABIA

Saudi Arabian Storage Area Network (SAN) Hardware Market Overview by
Technology

Saudi Arabian Storage Area Network (SAN) Hardware Market Overview by
Deployment Type

Saudi Arabian Storage Area Network (SAN) Hardware Market Overview by Company
Type

Saudi Arabian Storage Area Network (SAN) Hardware Market Overview by Industry
Sector

MOROCCO

Moroccan Storage Area Network (SAN) Hardware Market Overview by Technology

Moroccan Storage Area Network (SAN) Hardware Market Overview by Deployment
Type

Moroccan Storage Area Network (SAN) Hardware Market Overview by Company
Type

Moroccan Storage Area Network (SAN) Hardware Market Overview by Industry
Sector

KUWAIT

Kuwaiti Storage Area Network (SAN) Hardware Market Overview by Technology

Kuwaiti Storage Area Network (SAN) Hardware Market Overview by Deployment
Type

Kuwaiti Storage Area Network (SAN) Hardware Market Overview by Company Type

Kuwaiti Storage Area Network (SAN) Hardware Market Overview by Industry Sector

QATAR

Qatari Storage Area Network (SAN) Hardware Market Overview by Technology
Qatari Storage Area Network (SAN) Hardware Market Overview by Deployment Type
Qatari Storage Area Network (SAN) Hardware Market Overview by Company Type
Qatari Storage Area Network (SAN) Hardware Market Overview by Industry Sector

REST OF MIDDLE EAST & AFRICA

Rest of Middle East & Africa Storage Area Network (SAN) Hardware Market
Overview by Technology

Rest of Middle East & Africa Storage Area Network (SAN) Hardware Market
Overview by Deployment Type

Rest of Middle East & Africa Storage Area Network (SAN) Hardware Market
Overview by Company Type

Rest of Middle East & Africa Storage Area Network (SAN) Hardware Market
Overview by Industry Sector

PART C: INDUSTRY GUIDE

PART D: ANNEXURE

RESEARCH METHODOLOGY

FEEDBACK

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