

2010 Fibre Channel HBA Market Share

By Adam Zagorski

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Below is adapter revenue and market share data excerpted from the Q4CY2010 Network Adapter Report.

Adapter Revenue	CY09	Q1CY10	Q:Q	Q2CY10	Q:Q	Q3CY10	Q:Q	Q4CY10	Q:Q	CY10	Y:Y
QLogic											
Fibre Channel HBAs	\$ 363.0	\$ 93.2	-	\$ 89.0	-4.5%	\$ 90.6	1.8%	\$ 99.9	10.2%	\$ 372.8	2.7%
10GbE NICs and CNAs	\$ 3.8	\$ 5.4	-	\$ 8.5	57.9%	\$ 9.2	7.8%	\$ 10.3	12.6%	\$ 33.4	778.9%
iSCSI HBAs	\$ 9.5	\$ 3.3	-	\$ 3.1	-6.1%	\$ 2.6	-16.1%	\$ 2.0	-23.1%	\$ 11.0	15.8%
InfiniBand HCAs	\$ 4.8	\$ 1.8	-	\$ 1.9	5.6%	\$ 1.8	-3.7%	\$ 1.3	-27.8%	\$ 6.7	41.6%
Host Total	\$ 381.1	\$ 103.7		\$102.5		\$ 104.2		\$113.5		\$ 423.9	
Emulex											
Fibre Channel HBAs	\$ 248.1	\$ 60.5	-	\$ 63.2	4.5%	\$ 65.0	2.9%	\$ 76.1	17.1%	\$ 264.7	6.7%
10GbE LOM and CNAs	\$ 19.7	\$ 9.2	-	\$ 9.4	2.2%	\$ 14.2	51.1%	\$ 16.1	13.4%	\$ 48.9	148.2%
Host Total	\$ 267.8	\$ 69.7		\$ 72.6		\$ 79.2		\$ 92.2		\$ 313.6	

This is the IT Brand Pulse estimated breakdown of QLogic and Emulex adapter revenue based on analysis of both company's reported host product revenue.

Fibre Channel HBAs	CY09	Q1CY10	Q:Q	Q2CY10	Q:Q	Q3CY10	Q:Q	Q4CY10	Q:Q	CY10	Y:Y
Revenue (M)											
QLogic	\$ 363.0	\$ 93.2	-	\$ 89.0	-4.5%	\$ 90.6	1.8%	\$ 99.9	10.2%	\$ 372.8	2.7%
Emulex	\$ 248.1	\$ 60.5	-	\$ 63.2	4.5%	\$ 65.0	2.9%	\$ 76.1	17.1%	\$ 264.7	6.7%
Others	\$ 47.0	\$ 13.6	-	\$ 12.2	-10.3%	\$ 11.3	-7.2%	\$ 11.9	5.0%	\$ 48.9	4.0%
Total	\$ 658.1	\$ 167.2		\$ 164.4		\$ 166.9		\$ 187.8		\$ 686.4	
Fibre Channel Market Share											
QLogic	55.2%	55.7%	-	54.2%	-1.6%	54.3%	0.1%	53.2%	-1.1%	54.3%	-1.5%
Emulex	37.7%	36.1%	-	38.4%	2.3%	38.9%	0.5%	40.5%	1.6%	38.6%	2.3%
Others	7.1%	8.1%	-	7.4%	-0.7%	6.8%	-0.6%	6.3%	-0.5%	7.1%	-0.2%
	100.0%	100.0%		100.0%		100.0%		100.0%		100.0%	

In their January, 2010 earnings calls, Emulex and QLogic made claims about their market share positions in Fibre Channel host bus adapters (HBAs). IT Brand Pulse estimates that Emulex is correct: the company gained share over QLogic in each of the last three quarters and for all of 2010. We estimate that QLogic's assertion is also true: the company remains the leader with 56.3% of market share.

The Network Adapter Report

For stakeholders in the converged adapter market, the Network Adapter Report is designed to unveil key trends such as:

- Winners in Units, Revenue and Market Share for Ethernet, Fibre Channel, and InfiniBand LOM and Adapters
- The transition from 1GbE to 10GbE
- The growing use of Ethernet for SAN and HPC connectivity
- The effect of 10Gb LOM on mezzanine card attach rates
- The transition from optical to copper connectivity
- Vendor market shares in the new converged LOM and adapter market
- 5-year forecast for LOM and Adapters

About the Author



Adam Zagorski is VP and Senior Analyst, Market Share and Forecasting at IT Brand Pulse. Adam has over 20 years of experience in marketing and strategic planning at Western Digital, Adaptec, JNI and Aristos Logic. Adam runs the Market Research and Forecasting practice which each quarter publishes market share reports and 5-year forecast reports for data center infrastructure. You can contact Adam at adam.zagorski@itbrandpulse.com