Executive summary

This report focuses on enterprise storage systems deployed in video surveillance, a market of growing importance as video surveillance evolves beyond security and becomes more integrated into operations as part of video-centric IoT platforms. To enable these uses, suitable storage infrastructure is required. Video surveillance systems face the immense challenge of having to simultaneously manage, view, and record increasingly large numbers of high-definition network surveillance cameras without dropping any video frames. The already hefty requirements on storage are likely to be exacerbated when video surveillance networks are scaled to incorporate potentially hundreds of thousands of cameras with multiple uses on the same platform.

Of the 57,985 petabytes (1 petabyte = 1 million gigabytes) in raw storage capacity sold in 2017, approximately 26% of the capacity was in enterprise storage systems; pre-packaged recorders accounted for most of the capacity sold. Prospects for the market are robust: The amount of enterprise storage capacity being shipped is forecast to increase at a compound annual growth rate (CAGR) of 40% from 2017 to 2022.

Driving growth in enterprise storage are three factors: the increased shipments of surveillance cameras; the use in video surveillance of higher-specification cameras, resulting in the generation of more data; and longer retention times in storing video surveillance data for operations and to serve as evidence in litigation and civil/criminal cases.
Other findings of interest in the report

• Among geographic regions, the Chinese market was the largest, comprising over 50% of total enterprise storage revenue in 2017, driven by the government’s focus on connected surveillance systems through initiatives such as Xue Liang. The Americas region is the second-largest territory after China and is the most mature.

• Among vendors, the Chinese dominated the global market, with companies headquartered in China accounting for 61% share of total industry revenue. However, much of this share is derived from the domestic market. The report also presents market information excluding the Chinese domestic market.