

EXCERPT

Worldwide Data Warehouse Platform Software 2008 Vendor Shares

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IN THIS EXCERPT

This IDC Excerpt is taken from the Competitive Analysis report entitled, IDC Worldwide Data Warehouse Platform Software 2008 Vendor Shares, by Dan Vesset, (doc# 219096). All or part of the following sections are included in this Excerpt: In This Study, Situation Overview, Figures 1 & 2, and Tables 1, 2, 3, & 4.

IN THIS STUDY

This IDC study examines the DW platform software market for the period 2006–2008. Worldwide market size is provided for 2008, with trends from 2006 and 2007. Revenue and market share of the leading vendors are provided for 2008, with trends from 2006 and 2007. This study also provides profiles of leading vendors.

The vendor shares and competitive analysis contained herein update those found in *Worldwide Data Warehouse Platform Software 2007 Vendor Shares* (IDC #213671, August 2008). The most recent DW platform software market forecast can be found in *Worldwide Data Warehouse Platform Software 2009–2013 Forecast: Preliminary Trends Indicate Healthy Interest and Demand Tempered by Economic Downturn* (IDC #217442, March 2009).

Methodology

See the Learn More section for a description of the data collection and analysis methodology employed in this study.

In addition, please note the following:

- The information contained in this study was derived from the IDC Software Market Forecaster (SMF) database as of May 13, 2009.
- All numbers in this document may not be exact due to rounding.

For more information on IDC's software definitions and methodology, see *IDC's Software Taxonomy, 2009* (IDC #216557, February 2009).

Data Warehouse Platform Software Market Definition

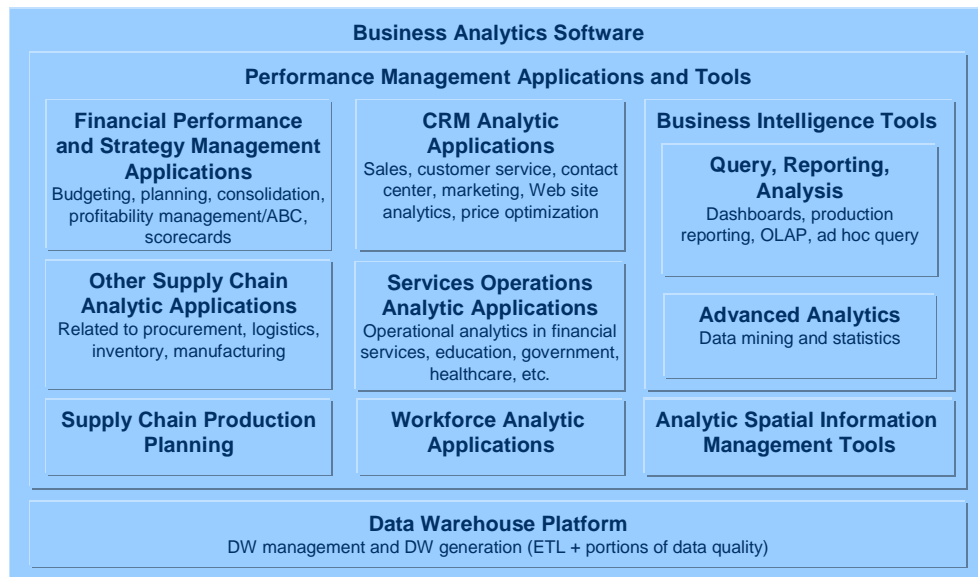
IDC defines the DW platform software market as being composed of two market segments, DW generation and DW management:

- ☒ **Data warehouse generation.** These tools include software used in the design, cleansing, transformation, loading, and administration of the data warehouse. Not included in the DW generation software segment are master data management applications as well as the majority of data quality tools.
- ☒ **Data warehouse management.** These tools include database management system (DBMS) software used to manage and process data in the data warehouse.

In IDC's software taxonomy, these DW platform software market segments are part of the broader market called business analytics software, which is depicted in Figure 1.

FIGURE 1

IDC's Business Analytics Software Taxonomy, 2009



Source: IDC, 2009

SITUATION OVERVIEW

The Data Warehouse Platform Software Market in 2008

As shown in Table 1, in 2008, the DW platform software market grew 11% to reach \$7.2 billion in worldwide license and maintenance revenue. This growth rate was as expected based on previously published IDC forecasts.

Table 1 also shows the different sizes and growth rates of the two primary segments of the DW platform software market: DW generation and DW management. The growth rates for these market segments were relatively even, although the DW management segment continues to be about three times larger than the DW generation segment. This size discrepancy is primarily due to the continued use of

various application development tools to custom build DW generation components. For both market segments, IDC includes revenue only from purpose-built tools for data warehousing.

TABLE 1

Worldwide Data Warehouse Platform Software Revenue by Segment, 2006–2008

	2006		2007		2008		2006–2007 Growth (%)	2007–2008 Growth (%)
	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)		
Data warehouse generation	1,363.9	23.9	1,536.4	23.6	1,719.5	23.8	12.6	11.9
Data warehouse management	4,354.3	76.1	4,987.6	76.4	5,519.9	76.2	14.5	10.7
Total	5,718.2	100.0	6,524.0	100.0	7,239.5	100.0	14.1	11.0

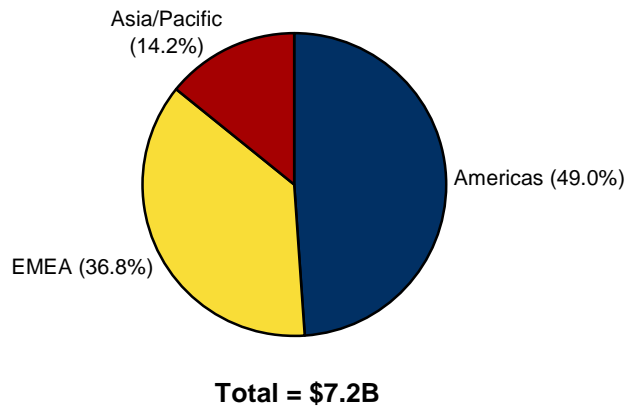
Note: Any changes to historical market size figures are due to restatements based on new information gained by IDC.
Source: IDC, June 2009

Performance by Geographic Region in 2008

Figure 2 shows the geographic breakdown of the DW platform software market. Further details and analysis of specific regional and country-level trends and market shares are available from IDC.

FIGURE 2

Worldwide Data Warehouse Platform Software Revenue Share by Region, 2008



Source: IDC, June 2009

Performance of Leading Vendors in 2008

Table 2 displays 2006–2008 worldwide revenue, growth, and market share of vendors with greater than \$10 million in DW platform software revenue. For short profiles of the leading DW platform software vendors, see the Vendor Profiles section.

Table 3 displays 2006–2008 worldwide revenue, growth, and market share of the leading vendors competing in the DW generation software segment of the market. The DW generation software segment represented 23.8% of the total DW platform software market and grew at 12%.

Table 4 displays 2006–2008 worldwide revenue, growth, and market share of the leading vendors competing in the DW management software segment of the market. The DW management software segment represented 76.2% of the overall DW platform software market and grew at 10.7%.

TABLE 2

Worldwide Data Warehouse Platform Software Revenue by Vendor, 2006–2008

Vendor	2006		2007		2008		2006–2007 Growth (%)	2007–2008 Growth (%)
	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)		
Oracle	1,824.8	31.9	2,080.2	31.9	2,288.6	31.6	14.0	10.0
IBM	1,272.0	22.2	1,422.6	21.8	1,597.0	22.1	11.8	12.3
Microsoft	777.6	13.6	904.6	13.9	1,039.9	14.4	16.3	15.0
Teradata	537.7	9.4	607.5	9.3	630.1	8.7	13.0	3.7
SAS	408.0	7.1	446.6	6.8	440.7	6.1	9.5	-1.3
Informatica	245.1	4.3	276.6	4.2	320.9	4.4	12.8	16.0
Sybase	79.7	1.4	110.9	1.7	137.6	1.9	39.2	24.0
Netezza	44.1	0.8	70.3	1.1	109.1	1.5	59.4	55.2
SAP	57.6	1.0	71.3	1.1	84.3	1.2	23.9	18.2
Fujitsu	35.5	0.6	33.6	0.5	35.0	0.5	-5.3	4.0
Pitney Bowes	30.7	0.5	33.8	0.5	34.2	0.5	9.9	1.4
Software AG	20.8	0.4	22.0	0.3	25.2	0.3	6.2	14.5
CA	17.6	0.3	19.5	0.3	19.4	0.3	10.8	-0.6

TABLE 2Worldwide Data Warehouse Platform Software Revenue by Vendor,
2006–2008

	2006		2007		2008			
	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)		
Accelrys	14.6	0.3	18.3	0.3	18.7	0.3	25.3	2.0
Vertica Systems	0.0	0.0	3.0	0.0	17.5	0.2	NA	483.3
Kognitio	10.1	0.2	13.6	0.2	15.8	0.2	34.4	16.2
Information Builders	14.8	0.3	15.0	0.2	13.5	0.2	1.0	-10.3
Evolutionary Technologies International	10.7	0.2	11.7	0.2	12.8	0.2	10.2	9.1
GoldenGate Software	7.5	0.1	10.2	0.2	11.2	0.2	36.0	10.2
InterSystems	8.8	0.2	10.1	0.2	11.1	0.2	14.3	10.3
Hitachi	10.0	0.2	9.3	0.1	10.6	0.1	-7.3	14.4
HP	5.7	0.1	8.4	0.1	10.2	0.1	48.3	21.0
Other	284.7	5.0	325.0	5.0	356.2	4.9	14.1	9.6
Total	5,718.2	100.0	6,524.0	100.0	7,239.5	100.0	14.1	11.0

Notes:

Any changes to historical market size figures are due to restatements based on new information gained by IDC.

Some vendors, including Netezza, Oracle, Teradata, and IBM, provide as part of their product portfolios hardware appliances for data warehousing. IDC estimates the hardware value of these products and excludes it from the revenue listed in the tables of this study in order to compare all vendors based on software revenue.

Source: IDC, June 2009

TABLE 3Worldwide Data Warehouse Generation Software Revenue by Vendor,
2006–2008

Vendor	2006		2007		2008		2006–2007 Growth (%)	2007–2008 Growth (%)
	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)		
IBM	269.2	19.7	291.6	19.0	335.5	19.5	8.3	15.1
SAS	275.1	20.4	305.4	19.9	331.2	19.3	11.0	8.5
Informatica	245.1	18.0	276.6	18.0	320.9	18.7	12.8	16.0

TABLE 3Worldwide Data Warehouse Generation Software Revenue by Vendor,
2006–2008

	2006		2007		2008			
	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)		
Microsoft	117.3	8.6	136.2	8.9	156.3	9.1	16.1	14.8
Oracle	82.9	6.1	94.7	6.2	104.0	6.0	14.3	9.8
SAP	57.6	4.2	71.3	4.6	84.3	4.9	23.9	18.2
Pitney Bowes	30.7	2.3	33.8	2.2	34.2	2.0	9.9	1.4
Accelrys	14.6	1.1	18.3	1.2	18.7	1.1	25.3	2.0
Information Builders	14.8	1.1	15.0	1.0	13.5	0.8	1.0	-10.3
Sybase	12.7	0.9	12.6	0.8	13.4	0.8	-0.9	6.2
Evolutionary Technologies International	10.7	0.8	11.7	0.8	12.8	0.7	10.2	9.1
GoldenGate Software	7.5	0.5	10.2	0.7	11.2	0.7	36.0	10.2
CA	10.4	0.8	11.0	0.7	10.7	0.6	6.5	-3.4
Other	215.3	15.8	247.9	16.1	272.8	15.9	15.1	10.0
Total	1,363.9	100.0	1,536.4	100.0	1,719.5	100.0	12.6	11.9

Note: Any changes to historical market size figures are due to restatements based on new information gained by IDC.

Source: IDC, June 2009

TABLE 4Worldwide Data Warehouse Management Software Revenue by Vendor,
2006–2008

Vendor	2006		2007		2008		2006–2007 Growth (%)	2007–2008 Growth (%)
	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)	Revenue (\$M)	Share (%)		
Oracle	1,742.0	40.0	1,985.4	39.8	2,184.6	39.6	14.0	10.0
IBM	1,002.8	23.0	1,131.0	22.7	1,261.5	22.9	12.8	11.5
Microsoft	660.3	15.2	768.3	15.4	883.5	16.0	16.4	15.0
Teradata	537.7	12.3	607.5	12.2	630.1	11.4	13.0	3.7

TABLE 4

Worldwide Data Warehouse Management Software Revenue by Vendor,
2006–2008

	2006		2007		2008			
Sybase	66.9	1.5	98.3	2.0	124.1	2.2	46.8	26.3
SAS	132.9	3.1	141.2	2.8	109.5	2.0	6.2	-22.5
Netezza	44.1	1.0	70.3	1.4	109.1	2.0	59.4	55.2
Fujitsu	35.5	0.8	33.6	0.7	35.0	0.6	-5.3	4.0
Vertica Systems	0.0	0.0	3.0	0.1	17.5	0.3	NA	483.3
Kognitio	10.1	0.2	13.6	0.3	15.8	0.3	34.4	16.2
Software AG	12.9	0.3	14.0	0.3	15.4	0.3	8.3	10.5
InterSystems	8.8	0.2	10.1	0.2	11.1	0.2	14.3	10.3
Hitachi	10.0	0.2	9.3	0.2	10.6	0.2	-7.3	14.4
HP	5.7	0.1	8.4	0.2	10.2	0.2	48.3	21.0
Other	84.5	1.9	93.6	1.9	101.9	1.8	10.7	8.9
Total	4,354.3	100.0	4,987.6	100.0	5,519.9	100.0	14.5	10.7

Notes:

Any changes to historical market size figures are due to restatements based on new information gained by IDC.

Some vendors, including Netezza, Oracle, Teradata, and IBM, provide as part of their product portfolios hardware appliances for data warehousing. IDC estimates the hardware value of these products and excludes it from the revenue listed in the tables of this study in order to compare all vendors based on software revenue.

Source: IDC, June 2009

Vendor Profiles

The sections that follow highlight the performance of leading DW platform software vendors in 2008.

SAS

SAS finished 2008 as the fifth-largest DW platform software vendor, with \$441 million in revenue and 6.1% market share. SAS has continued to emphasize its advanced analytics, business intelligence, and analytic applications products at the expense of tools that IDC has been counting in the DW management segment of the market. As a result, SAS has performed better in the DW generation segment of the market, offering a number of products, including those under the DataFlux brand. However,

as noted in the Data Warehouse Platform Software Market Definition section of this study, IDC is not counting master data management and the majority of data quality tools in the DW generation segment. SAS offers both of these tools under its DataFlux brand. In 2008, SAS also placed significant focus on partnerships with DW management vendors such as Teradata and Netezza for in-database processing. SAS also continues to offer its data storage products that are optimized for SAS analytics and analytic applications. As a result, we expect SAS to maintain its position in the DW generation market segment.

Comments on Other Selected Vendors

In addition to the above-mentioned largest DW platform software vendors, there is a vibrant market of smaller vendors in the DW generation and DW management segments of the market.

One of these groups includes virtual and physical DW appliance vendors. In addition to Netezza, Kognitio, and Vertica (refer back to Tables 2 and 4), these vendors include HP, ParAccel, Greenplum, Aster Data Systems, 1010data, Infobright, Kickfire, illuminate, EXASOL, and Dataupia. These vendors are seeing a varying degree of adoption. Some of the start-ups in this group are unlikely to survive in the long term. As mentioned previously, some will likely find an exit from the market through acquisitions, while others will simply fold in the face of competitive pressure.

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