

## IDC: All-Flash "Shines" in EMEA External Storage

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The EMEA enterprise external storage market continues to decline in Q1 2017, IDC reports-- revenue is down by -3.9% Y-o-Y, even as the all-flash market exceeds expectations with 100.7% growth.

All-flash is particularly popular in W. Europe and MEA, where it sees "accelerated" growth. On the other hand, the traditional HDD segment is down by -34.7% in Q1 2017.

Top 5 Vendors, EMEA External Disk Storage Systems Value (\$M)					
Vendor	1Q16	1Q16 Market Shares	1Q17	1Q17 Market Shares	1Q17 YoY Growth
Dell Technologies	\$518.4	31.8%	\$409.5	26.1%	-21.0%
NetApp	\$258.7	15.9%	\$282.4	18.0%	9.2%
HPE	\$237.6	14.6%	\$228.9	14.6%	-3.7%
IBM	\$143.6	8.8%	\$166.9	10.6%	16.2%
Hitachi	\$134.0	8.2%	\$146.6	9.4%	9.4%
Others	\$338.3	20.7%	\$333.1	21.3%	-1.6%
<b>Grand total</b>	<b>\$1,630.8</b>	<b>100.0%</b>	<b>\$1,567.5</b>	<b>100.0%</b>	<b>-3.9%</b>

Top 5 Vendors, EMEA External Enterprise Storage Systems (Value Market Share), 2017Q1

"Brexit uncertainty, unfavorable exchange rates, major vendors' internal reorganisations, and increased component costs for SSD have weighed down on EMEA performance once again,

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making Q1 2017 the 9th quarter of uninterrupted decline for the region," the analyst says. "However, as enterprises progress in their digital transformation paths, sales of all-flash array systems, standalone or converged, see no crisis in sight, doubling their sales compared to the same period a year ago and reaching a quarter of total sales."

IDC describes the W. European external storage market as "lackluster," with a -0.8% Y-o-Y fall on revenues reaching \$1.22bn. That said, as seen in Euro the W. European ESS market is up by 2.7% Y-o-Y in value. Capacity in the region is up by 6.7% to 2350.4 petabytes. All-flash array (AFA) storage in the region sees 107.1% Y-o-Y growth, and flash storage systems (AFA and HFA) together account for 70.3% of total W. European market value.

Meanwhile the external storage market in CEMA is down by -14% Y-o-Y to \$340.8m. Capacity is also down, the result of a marginal reduction of \$/GB. Such negative performance is the result of the Russian market's performance, and excluding Russia would see the decline reach a single-digit rate. The AFA segment posts another successful quarter in CEMA, with 80% Y-o-Y growth and 23% of total value.

On the subregional level, CEE sees storage investments intensify (at least CEE EU member states), boosted by the launch of new flash-optimised midrange solutions and high-end storage projects by government, finance and manufacturing sectors. However, as mentioned earlier, Russia dragged the entire region down due to the postponement of already approved projects for next quarter by public and large corporate clients.

MEA shows a more diverging trend than previous quarters, and was able to limit decline to single digits thanks to SMB activity. Spending behaviour differs by country-- smaller markets increased investments in midrange and high-end hybrid storage, while the largest markets (S. Africa, Turkey, Israel, S. Arabia) doubled their investments in AFA solutions.

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