

Purpose-Built Backup Appliances on the Up in EMEA

Written by Marco Attard
20 September 2018

According to IDC, the EMEA purpose-built backup appliance (PBBA) market is up by 26.8% Y-o-Y in Q2 2018, with revenues worth \$239.7 million-- a 2nd period in a row of double-digit growth for the market.

Growth in H1 2018 reaches 19% Y-o-Y. Driving the EMEA PBBA market are open systems, with Q2 2018 revenues growing by 25.7% Y-o-Y to \$214.9m. Mainframe systems also see sales growth, with strong 37.3% Y-o-Y growth during the quarter.

EMEA PBBA Vendor Revenue by Product, 2Q18 (Revenues in \$M)

| Vendor Revenues (\$M) | 2Q17 Revenue | 2Q17 Market Share | 2Q18 Revenue | 2Q18 Market Share | 2Q18/2Q17 Growth |
|-----------------------|----------------|-------------------|----------------|-------------------|------------------|
| Mainframe systems | \$18.1 | 9.6% | \$24.8 | 10.4% | 37.3% |
| Open systems | \$171.0 | 90.4% | \$214.9 | 89.6% | 25.7% |
| Total | \$189.0 | 100.0% | \$239.7 | 100.0% | 26.8% |

EMEA PBBA Open Systems, 2Q18

| Vendor Revenues (\$M) | 2Q17 Revenue | 2Q17 Market Share | 2Q18 Revenue | 2Q18 Market Share | 2Q18/2Q17 Growth |
|-----------------------|----------------|-------------------|----------------|-------------------|------------------|
| Integrated systems | \$58.2 | 34.1% | \$68.1 | 31.7% | 16.9% |
| Target systems | \$112.7 | 65.9% | \$146.7 | 68.3% | 30.2% |
| Total | \$171.0 | 100.0% | \$214.9 | 100.0% | 25.7% |

In regional terms, W. Europe sees 26.6% Y-o-Y growth in Q2 2018 to \$184.3m, with open systems and mainframe systems showing respective growth of 24.3% and 48.6%. Target systems are the main driver of open systems, with 28.7% Y-o-Y growth, while integrated systems report a 16.6% Y-o-Y increase. Franch and DACH show "robust" spending, with 46.7% and 41.6% Y-o-Y growth respectively.

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"Digital transformation is forcing European enterprises to invest in projects aiming to modernise their datacentre with solutions that offers not only data quality and validation solutions that help them make the data more accurate and compliant, but also to incorporate data management solutions to give enterprises agile and unified access to the various data formats across multiple platforms and provide IT control, stability, reliability, and availability that are equally critical for the digital transformation success, IDC says. "This has helped boost the PBBA market in W. Europe as some vendors have incorporated data control, management solutions, and the ability to tier to the cloud into their product portfolio."

CEMA also shows solid growth reaching 27.3% Y-o-Y in Q2 2018, with open systems (both target and integrated) as main boost. Mainframe solutions, on the other hand, remain flat. Both CEE and MEA PBBA markets show revenue growth, with CEE outperforming MEA with 40% Y-o-Y growth, the result of heightened demand in bigger countries. Most vendors record growth across the subregion, strongly supported by the channel, while MEA performance varies more significantly from country to country.

"Clients are increasingly looking not only for backup but very much for fast data restore, which is crucial for their business," the analyst concludes. "This turns out to be one of the biggest advantages for PBBA which will sustain demand, notwithstanding emerging new backup technologies and approaches. This trend is especially valid for CEMA, where cloud penetration is slower compared to W. Europe and the major vendors still invest extensively in this segment."

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