

IDC: The Thin Client Opportunity

Written by Marco Attard
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According to IDC Q2 2013 global thin client and terminal client device shipments total 1.3 million units with 7.4% Q-o-Q growth-- -8.2% less than earlier forecasts from the analyst expecting further near future growth.

IDC forecasts full 2013 shipments will reach 5.3m units with 2.1% growth, before growing by 10.4% to 5.9m units in 2014 and amounting to 8.3m units by 2017.

Worldwide Enterprise Client Device Unit Shipments, Market Share, and YoY Growth, Second Quarter 2013

| Vendors | 2Q13 Unit Shipments | 2Q13 Market Share | 2Q12 Unit Shipments | 2Q12 Market Share | 2Q13/2Q12 Growth |
|---------------|---------------------|-------------------|---------------------|-------------------|------------------|
| 1. HP | 331,254 | 26.2% | 367,412 | 28.0% | -9.8% |
| 2. DellWyse | 300,503 | 23.8% | 373,727 | 28.5% | -19.6% |
| 3. NComputing | 229,405 | 18.1% | 138,991 | 10.6% | 65.1% |
| 4. Centerm | 66,981 | 5.3% | 90,776 | 6.9% | -26.2% |
| 5. Igel | 54,603 | 4.3% | 43,266 | 3.3% | 26.2% |
| All Vendors | 1,265,119 | 100% | 1,312,940 | 100% | -3.6% |

Source: IDC Worldwide Quarterly Enterprise Client Device Tracker, Q2 2013.

Thin clients make 96% of total enterprise client devices. The standalone form factor is the largest (89%) market segment, even if the mobile form factor is slowly yet surely gathering momentum.

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W. Europe see LCD thin clients as dominant form factor, while on a global scale zero clients hold 24% share and Linux-based clients 25%.

HP dominates the Q2 2013 vendor stakes, with 26.2% global market share and top rank in 5 out of 8 regions. DellWyse follows with 23.8% WW share, followed by NComputing (18.1%), Centerm (5.3%) and Igel (4.3%).

"The US is still the largest market and is expected to grow with HP and Dell leading the way, but the strongest opportunity will be in China," IDC says. "The reduction in cost as well as easier endpoint management that desktop virtualization provides will drive thin client growth, as these are attractive options for companies wanting simpler management. While VDI (virtual desktop infrastructure) can replace old PCs to reduce hardware issues, we also expect to see more offerings of mobile virtualisation applications that allow IT departments to skip the necessity of having to deliver a desktop altogether."

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