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05 October 2018

EMEA Q2 2018 server revenues total €3.4 billion-- an 18.7% Y-o-Y increase, even as shipments are down by -3.7% Y-o-Y to 515000. Such results are due to shipment declines accompanied by a "significant" increase in ASPs.

In terms of product categories, standard rack optimised shipments are up by 29% Y-o-Y, with strong performance in the UK and Germany. The UK, Germany and the Netherlands drive standard multinode shipments with 251.4% Y-o-Y growth, while custom multinode revenues remain strong with 87.3% Y-o-Y growth. Large systems also see strong performance, with shipments growing by 48.6% due to "major" refreshes in Denmark, Italy, France and Germany.

Top 5 EMEA Vendor Revenues ($M)

Vendor	2Q17 Server Revenue	2Q17 Market Share	2Q18 Server Revenue	2Q18 Market Share	2Q17/2Q18 Revenue Growth
HPE	1,031.5	32.5%	1,162.6	28.4%	12.7%
Dell EMC	599.9	18.9%	916.3	22.4%	52.7%
ODM Direct	381.5	12.0%	442.8	10.8%	16.1%
IBM	195.9	6.2%	387.3	9.5%	97.7%
Lenovo	226.8	7.1%	330.2	8.1%	45.6%
Others	739.0	23.3%	853.1	20.8%	15.4%
Total	3,174.5	100.0%	4,092.3	100.0%	28.9%

Source: IDC Quarterly Server Tracker, 2Q18

"ODM growth has been driven by datacenter buildout of several hyperscale public cloud providers-- AWS, Microsoft, Google-- in W. Europe," the analyst adds. "This growth has slowed down somewhat in recent quarter. France is the major exception, with both AWS and Microsoft opening new datacenters around Paris and Marseille. The hyperscalers now focus on diversifying the portfolio of EMEA countries with datacenter presence, which will translate into significant ODM growth in new geographies such as Austria."

W. Europe sees overall shipment declines-- for instance, shipments are down by -14% Y-o-Y in Germany, with ASP increases leading to 23.2% Y-o-Y revenue growth. The UK sees a -8.7% Y-o-Y decline and 29.9% Y-o-Y revenue increase, helping propel overall Q2 2018 W. European revenues. Spain is the only W. European country with revenue declines, the result of a major Q2 2017 multinode deal impacting total Spanish spend.

Meanwhile CEE and MEA server revenues are up by 23.3% Y-o-Y to $790.1m in Q2 2018, with undergoing refresh cycles and ODM server shipments driving strong server sales. CEE revenues total $413.7m, a 33.7% Y-o-Y increase. Romania, Poland and Czech Republic show the strongest growth, thanks to a "solid" economic situation and investment in the updating of datacentre infrastructure.

MEA revenues are up by 13.6% Y-o-Y to $376.5m, a slowdown brought about by seasonality and weakening local currencies. Qatar is top performer as it benefits from a large public deal, while investments in new IT infrastructure to support next-gen applications bring about "solid" growth in S. Africa and Egypt.

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