

IDC: EMEA Integrated Systems Up 20.1% in Q3 2018

Written by Marco Attard
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According to IDC, the Q3 2018 EMEA integrated systems market is worth \$873 million, a 20.1% Y-o-Y increase brought about by increased adoption of hyperconverged systems as IT managers shift focus higher up the rack.

Top 5 Vendor Storage Systems Value Table

Brand	2Q18	3Q18	Annual Growth
Dell EMC	\$ 222.27	\$ 299.93	32.9%
Cisco/NetApp	\$ 114.39	\$ 92.21	-5.0%
HPE	\$ 88.76	\$ 88.14	-14.7%
Oracle	\$ 138.50	\$ 85.38	24.6%
Nutanix	\$ 57.81	\$ 49.03	62.3%
Others	\$ 241.76	\$ 258.46	27.8%

"Similar to last quarter, the growth in integrated systems has mainly been driven by a strong hyperconverged segment, while the more traditional certified reference systems & integrated infrastructure and integrated platforms segments saw a flat trend in US dollar value terms, with little differentiation between segments," the analyst says. "Overall demand generated by the advantage of having pre-integrated, fine-tuned systems able to simplify the management and deployment of datacenter infrastructure, but their higher acquisition cost limits their deployment to specific use cases."

Traditional converged systems (certified reference systems & integrated infrastructure and integrated platforms) have a flat Q3 2018, but still account for over 60% of total EMEA sales. Meanwhile hyperconverged systems show strong 70.9% Y-o-Y growth to reach \$348m.

W. Europe accounts for 78% of EMEA sales, of which the UK, France, Germany and the

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Nordics make 75%. A handful of vendors drive the W. European hyperconverged market, with a focus on the larger 500 companies bringing "greater success." Meanwhile CEMA accounts for the remaining 22%, with CEE recording the strongest growth in EMEA. CEMA hyperconverged system sales exceed both converged systems and integrated platform sales for the first time, and see 81% Y-o-Y growth.

"The majority of hyperconverged systems sales were driven by organizations from developing countries, mostly in the MEA region where the deployment of hyperconverged systems helps to address the lack of skilled IT resources as well as organisations' growing need for scalability and agility," IDC concludes.

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