

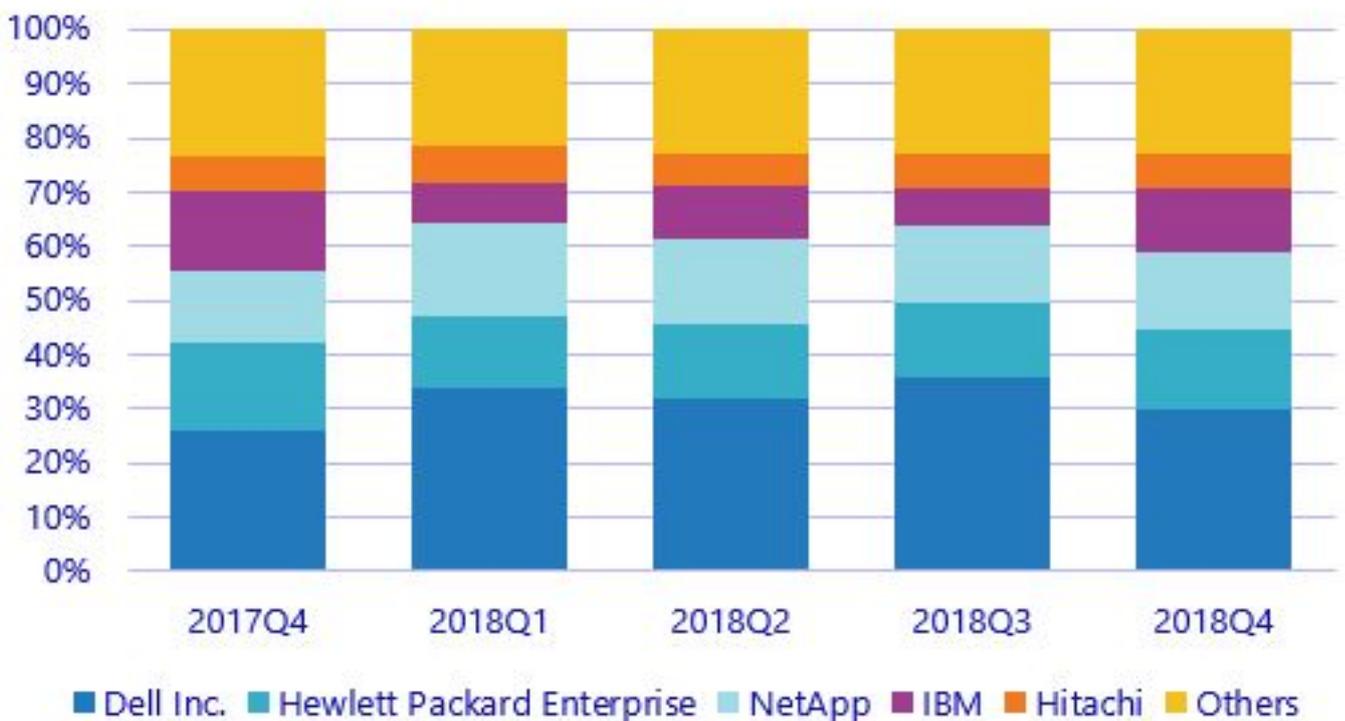
IDC: Record Growth for EMEA External Storage

Written by Marco Attard
14 March 2019

The EMEA external storage systems market records a positive Q4 2018 with revenues growing by 9.4% Y-o-Y, IDC reports. As for full-year 2018, the market shows record growth of 16.4% on the back of strong investments.



EMEA Top 5 Enterprise Storage Systems Companies, 2018Q4 Value Market Share



Source: IDC 2019

The all-flash-array (AFA) segment nearly makes 40% of total shipments in value (37% in Q4 2018 and 35% for 2018), and is about to take hybrid arrays (HFAs) as the most popular array type. HFAs still account for 45.1% of 2018 shipments (or 43.8% in Q4 2018), if with slower

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growth of 5.8% Y-o-Y, versus the 32% Y-o-Y growth in AFAs.

The growth in flash-powered arrays comes at the expense of HDD-only arrays, which currently remain mostly confined to secondary workloads. HDD-only arrays are down by -12.8% Y-o-Y in Q4 2018 and bby -18.4% for the full year.

In regional terms, the W. European market is up by 10.1% in terms of revenue, with all-flash arrays driving much growth. The segment makes 38% of total shipments, with a Y-o-Y increase of nearly 25%. IDC points out storage spending has showed great resiliency so far in the face of political and economic instability hitting the region. Companies are updating datacentres to handle AI workloads and edge-to-core-to-cloud integration, adopting emerging technologies such as NAFA or NVME-AFA arrays to take advantage of the workload consolidations such arrays enable.

Meanwhile CEMA records 7.5% growth in external storage spending, with AFAs driving the entire market with 60% Y-o-Y growth and a 35% increase in share. The growth comes at the back of a flourishing CEE market (20.5% Y-o-Y) with almost all individual markets except C. Europe recording growth. MEA performance is more varied (-4.2% Y-o-Y) as smaller countries see significant storage shipment growth while bigger countries, such as Turkey and S. Africa, lag behind.

"The external storage market in CEMA is strongly supported by refresh cycles in CEE and large-scale digital projects run by governments across MEA," the analyst remarks. "The boost also comes from vendors expanding their presence in the region and by the entrance of hyperscalers that did not have datacentres in the region until now."

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