

## Flat Revenues on Enterprise External Storage

Written by Marco Attard  
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According to IDC Q4 2011 enterprise-grade external disk storage system (EDSS) revenues in W. Europe are up by just 2% Y-o-Y, reaching \$1.51bn, indicating stress on the market.



It was also the first quarter in W. Europe where vendors shipped over 1 exabyte (1 million terabytes) of new capacity in total-- 11% Y-o-Y growth in capacity.

Meanwhile Q4 2011 prices are up by 10% Q-o-Q due to shortages throughout the HDD supply line.

Seasonally Q4 shows healthy high-end sales (37% Q-o-Q growth), even if overall activity was flat on a Y-o-Y basis. Offsetting strong year-end moment in Germany, Switzerland and Belgium is weakness in other markets, including the UK, the Netherlands, Spain and Sweden.

When it comes to 2011 in total, IDC reports the W. European EDSS market reaches \$5.34bn in 2011, with 5.3% Y-o-Y growth, "despite the fragile state of European business confidence and the limited visibility."

EMC remains top vendor in Q4 thanks to Data Domain business, even if it lost some share in midrange sales. IBM comes 2nd, with XIV losing share within the IBM portfolio.

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NetApp follows as the only Tier 1 vendor showing double-digit growth in the region, while HP comes 4 with "mildly declining sales" within the traditional entry-level and midrange storage segments.

For 2012, IDC predicts "major temporary disruption" for capacity pricing trends-- that is, price increases-- with the market growing by 2% over 2011.

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