

Gartner: Q4 2013 EMEA Servers Down

Written by Marco Attard
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The EMEA server market "continues to suffer" during Q4 2013 according to Gartner, with revenues dropping by -6.4% Y-o-Y to \$3.6 billion as shipments total 613000 units with a -2.5% Y-o-Y decline.

Further decline is seen in overall 2013 results-- shipments are down by -5.6% to 2.3 million units while revenues drop by -6.3% to \$12.4bn.

EMEA: Server Vendor Revenue Estimates, 4Q13 (U.S. Dollars)

Company	4Q13 Revenue	4Q13 Market Share (%)	4Q12 Revenue	4Q12 Market Share (%)	4Q13-4Q12 Growth (%)
HP	1,227,689,485	34.5	1,257,104,552	32.9	-1.9
IBM	915,632,505	25.7	1,244,617,164	32.7	-26.4
Dell	488,845,100	13.7	467,717,300	12.3	4.5
Fujitsu	252,090,555	7.1	246,676,881	6.5	2.2
Oracle	170,936,564	4.8	162,818,277	4.3	5.0
Others	503,197,846	14.1	429,986,643	11.3	17.0
Total	3,558,392,054	100.0	3,802,920,816	100.0	-6.4

Source: Gartner (February 2014)

"The EMEA server market continued to suffer as it recorded its 10th consecutive quarterly revenue decline," the analyst says. "Economic weakness continued to have a profound effect on the EMEA server market. Total revenue in 2013 was only around two-thirds of that seen in 2007, before the downturn set in."

All regions see Q4 2013 revenue declines, with the worst in E. Europe at -14.1% Y-o-Y. W. European revenues drop by -4.9% Y-o-Y, while MEA sees a -6.8% decline.

The only platform seeing Q4 2013 growth is x86 servers, with revenues grow by all of 1.4%

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Y-o-Y. RISC/Itanium Unix revenues drop by -20.1% and Other CPU by -35.7% as platform migration continues to hit non-x86-based systems.

When it comes to vendors both HP and IBM see revenue declines. HP sees lower than average decline, as improved execution led to Y-o-Y market share gains. On the other hand product life cycles lead to a weak quarter for IBM, with revenues declines of -26.4% Y-o-Y and market share loss of 7% compared to the same quarter in 2012.

EMEA: Server Vendor Shipments Estimates, 4Q13 (Units)

Company	4Q13 Shipments	4Q13 Market Share (%)	4Q12 Shipments	4Q12 Market Share (%)	4Q13-4Q12 Growth (%)
HP	241,385	39.4	247,613	39.4	-2.5
Dell	120,376	19.6	125,762	20.0	-4.3
IBM	69,311	11.3	82,803	13.2	-16.3
Fujitsu	33,362	5.4	37,611	6.0	-11.3
Cisco	14,054	2.3	13,816	2.2	1.7
Others	134,787	22.0	121,447	19.3	11.0
Total	613,274	100.0	629,052	100.0	-2.5

Source: Gartner (February 2014)

Oracle and Dell achieve the strongest Q4 2013 revenue increase at 4.5% and 5% respectively.

"The EMEA server market ended the year on a particularly low point," Gartner adds. "The good news for vendors is that demand appears to be stabilising, but polarization remains between high-end and low-end platforms. Vendors that sell low-end servers should see a more positive 2014, but those exposed to the high-end segments will continue to face tough challenges."

On a global basis the Q4 2013 market sees 3.2% Y-o-Y shipment growth and revenue declines of -6.6% Y-o-Y as the enterprise segment remains "relatively constrained" even as the industry sees growth in web-scale IT deployment.

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