

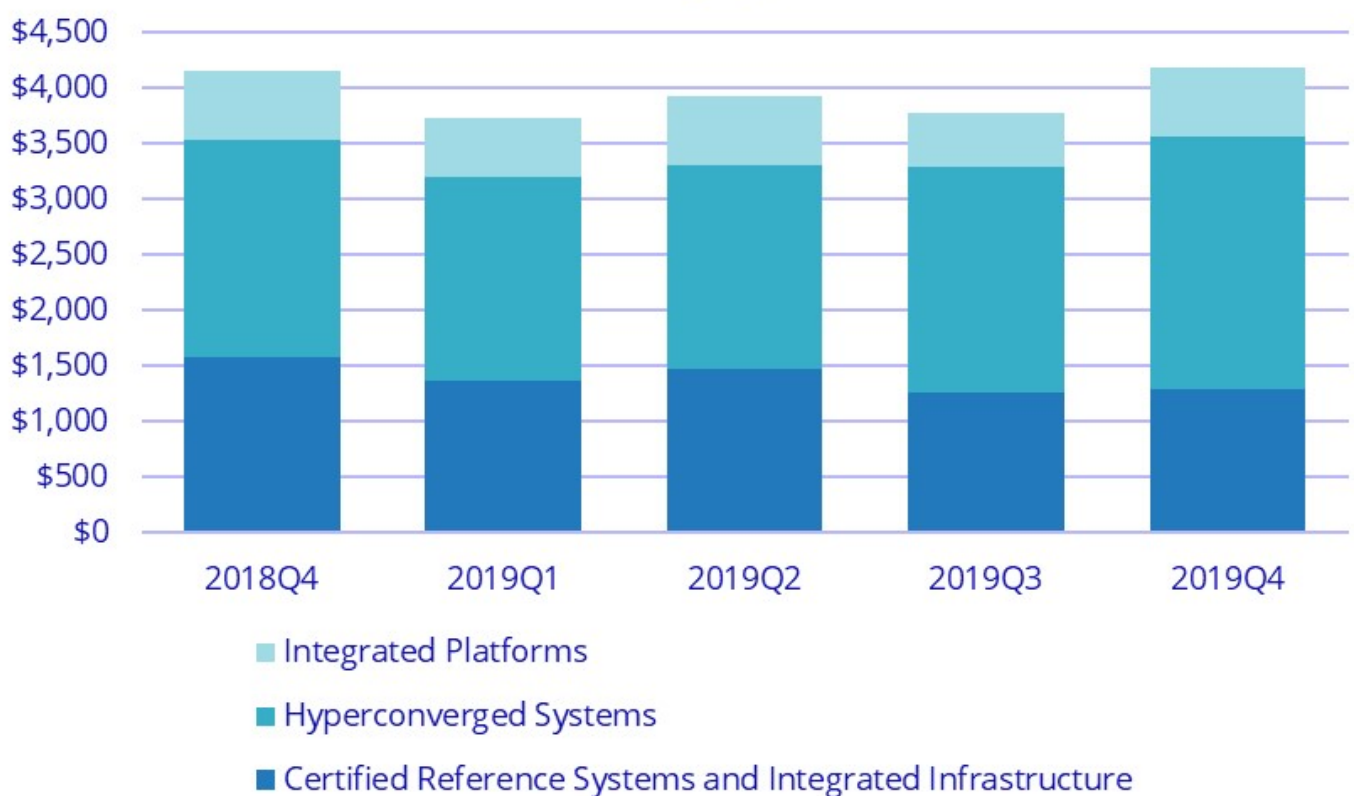
IDC: Converged Systems Up by 1.1% in Q4 2019

Written by Marco Attard
26 March 2020

According to IDC, global converged systems revenues are up by 1.1% Y-o-Y to \$4.2 billion in Q4 2019, the result of robust hyperconverged systems sales carrying the overall market despite annual declines of product types.



Worldwide Converged Systems Market by Product Category, 2019Q4



Source: IDC 2020

The analyst divides the converged systems market in 3 segments-- reference & integrated infrastructure, integrated platforms and hyperconverged systems. Certified reference systems &

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integrated infrastructure revenues total \$1.3bn in Q4 2019, a -18.5% Y-o-Y decline even as they represent 30.7% of all converged systems revenues. Integrated platforms are up by 0.1% in Q4 2019, generating revenues worth \$620m and making 14.8% of total market revenues.

Hyperconverged systems revenues are up by 17.2% Y-o-Y in Q4 2019 to \$2.3 billion, amounting to 54.5% of total converged systems market revenue. IDC says hyperconverged systems growth is "largely consistent" across the globe, with every region showing growth in the low to mid-double range. Such systems continue to provide value to a wide variety of businesses, in both hybrid and multicloud environments.

IDC ranks hyperconverged systems vendors in two ways-- by hyperconverged solution vendor brand and by the owner of the software providing core hyperconverged capabilities. In terms of vendor brand, Dell tops the Q4 2019 rankings with revenues reaching \$760m and 33.3% share. Nutanix follows with \$312.9m in branded hardware revenue, representing 13.7% of the segment. In 3rd place is a 3-way tie between Cisco, Lenovo and HPE, generating \$138.0m, \$121.8m and \$115.5m in revenue, representing 6.0%, 5.3% and 5.1% market share, respectively.

In terms of software ownership, VMware remains the most popular with 41.1% of the market and revenues worth \$938m. Nutanix makes 27% of the market with revenues reaching \$616.4m. Both amounts represent the value of all HCI hardware, software and system infrastructure sold, regardless of branding at the hardware level.

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