Worldwide High Performance Computing 2018 Total Market Model: Server Revenue Shares

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EXECUTIVE SUMMARY

This Intersect360 Research report presents vendor revenue and market share for servers in the High Performance Computing (HPC) market for 2018.

Intersect360 Research defines HPC as the use of servers, clusters, and supercomputers—plus associated software, tools, components, storage, and services—for scientific, engineering, or analytical tasks that are particularly intensive in computation, memory usage, or data management. Intersect360 Research reports available in this series include the following segmentations:

- *Products and Services:* servers, storage, networks, software, service, cloud, other
- *Economic sectors:* industry, government, academia
- *Vertical markets:* academia, national security, national research labs, national agencies, state or local governments, bio sciences, chemical engineering, consumer product manufacturing, electronics, energy, financial services, large product manufacturing, media and entertainment, retail, transportation, other commercial
- *Regions:* North America, EMEA, Asia-Pacific, Latin America
- *Server class (HPC server revenue):* entry-level, midrange, high-end, supercomputer
- *Cloud categories (HPC cloud revenue):* raw cycles, cloud storage, application hosting (SaaS), infrastructure hosting (IaaS, PaaS), other
- *Software categories (HPC software revenue):* operating environments, developer tools, middleware, storage software, transfer costs, application software, other
- *Services categories (HPC services revenue):* maintenance and repair, system engineering, system integration, training, programming services, other
- *HPC server market shares* (current year only, not forecast)
- *HPC storage market shares* (current year only, not forecast)

The HPC server category grew to nearly $13 billion worldwide in 2018, up 9.1% from 2017. HPE retained its number-one market share position, though the gap to number-two Dell EMC narrowed and is now quite slim. Dell EMC added more revenue (by absolute dollars) than any other vendor in 2018. HPE stands to gain share in 2020 as a result of its planned acquisition of Cray, the number-five vendor in 2018. Cray was the fastest-growing named vendor (by percent growth) in 2018, slightly ahead of Inspur.

Revenues, shares, and analysis for Atos (Bull), Fujitsu, Huawei, IBM, and Lenovo are also given in this report. These top nine vendors were responsible for over 85% of HPC server market revenue. This report also includes brief discussion of other noteworthy vendors, including Penguin, Hitachi, NEC, Sugon, Supermicro, Intel, NVIDIA, and Cisco.

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COMPANIES MENTIONED IN THIS REPORT

Companies mentioned in this report, in alphabetical order, include:

- Atos (Bull)
- Cisco
- Cray
- Dell EMC
- Fujitsu
- Hewlett Packard Enterprise (HPE)
- Hitachi
- Huawei
- IBM
- Inspur
- Intel
- Lenovo
- NEC
- NVIDIA
- Penguin Computing
- Sugon

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