

# HPC Market Model and Forecast: 2016 to 2021

## Snapshot Analysis Executive Summary

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**Intersect360**  
R E S E A R C H

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# HPC Market, 2016 - 2021

- Total worldwide HPC market (servers, storage, software, etc.) reached \$35.6 billion in 2016, up 3.5% from 2015.
- Servers were the largest component, reaching \$11.5 billion (3.3% growth over 2015).
- Total market is forecast to grow to \$43.9 billion in 2021, 4.3% CAGR.
- Growth has been driven significantly by commercial HPC markets; this continues over the next five years.
- Government represents 26% of the total market. U.S. government is about half of the worldwide number.
  - We are tentatively assuming only minor changes to U.S. government HPC spending

# HPC Methodology Updates: 2016

1. Refined model with weighting of end-user input by sector, based on increased data for commercial HPC
2. Expanded the number of major suppliers that we track directly.  
Added: Atos, Huawei, Inspur, Penguin
3. Extended the secondary or “Other Supplier” model methodology, based on financial reporting
4. Combined HPTC and HPBC
  - Sector focus (commercial, industry, academia) simplifies market description
  - Big Data did not drive significant market growth
  - Some HPBC segments moved to Hyperscale market

Changes applied across all years; net result is larger market, with largest increases in software and services

## TECHNOLOGIES COVERED IN THIS REPORT

- HPC system elements
  - Systems, clusters
  - Server technologies
- Storage elements
  - Storage systems
- Interconnect elements
  - System interconnects
- Software elements
  - Operating systems
- Services
- Cloud computing, grid computing, utility computing
- Other technology trends
  - Big Data trends
  - Government programs or investment in HPC

# COMPANIES MENTIONED IN THIS REPORT

Atos/Bull  
Cray  
DDN  
Dell EMC  
Fujitsu  
HDS  
HPE  
Huawei  
IBM  
Inspur  
Intel  
Lenovo  
NetApp  
Oracle  
Panasas  
Penguin  
Seagate  
SGI  
Spectra