

Worldwide High Performance Computing 2016 Total Market Model and 2017–2021 Forecast: Products and Services

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EXECUTIVE SUMMARY

This Intersect360 Research report presents the 2016 total market model and five-year forecast for the overall High Performance Computing (HPC) market, segmented into product and services categories, including servers, storage, services, software, networks and other products. The forecast horizon is from 2017 through 2021, with compound annual growth rates (CAGRs) using 2016 as a base.

Other Intersect360 Research reports provide forecast segmentations by server class (entry-level, mid-range, high-end, supercomputer), geographic region, economic sector (academia, government, industry), and vertical market, as well as vendor shares for the current year for servers and for storage.

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 separately tracks the hyperscale market, which consists of arbitrarily scalable, web-facing application infrastructure in excess of \$1 million of annual spending from a given site.

Some of the key findings of this report include:

- The total worldwide HPC market (servers, storage, software, etc.) reached \$35.6 billion in 2016, up 3.5% from 2015.
- Intersect360 Research projects HPC revenue compound annual growth rate to be 4.3% CAGR from 2016 to 2021, reaching \$43.9 billion at the end of the forecast period.
- Servers were the largest component, reaching \$11.5 billion (3.3% growth over 2015). Servers will lead the market in terms of absolute revenue growth, adding over \$3 billion to the market by 2021 and accounting for about 37% of the market's incremental revenue over the forecast period.
- Interest in public cloud computing models for HPC applications continues to grow, but it overall remains a small portion of the market. Cloud spending showed the highest growth rate; however, the category appears to be leveling out after double-digit growth the previous two years, on top of a relatively small base.

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

TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
TECHNOLOGIES COVERED IN THIS REPORT	2
TABLE OF CONTENTS	3
INTRODUCTION	4
What Is HPC?	5
HPC 2016 TOTAL MARKET MODEL: PRODUCT CATEGORIES	6
2016 Market Performance.....	6
2016–2021 HPC MARKET FORECAST: PRODUCT CATEGORIES.....	7
CONCLUSIONS.....	11
APPENDIX A: METHODOLOGY	12
Methodology Updates	12
APPENDIX B: HPC MARKET DYNAMICS MODEL AND FUNDAMENTAL FORECAST	
ASSUMPTIONS	14
Market Maturity	14
Fundamental Market Dynamics Model.....	14
Fundamental Market Assumptions	16
Fundamental Drivers	16
Fundamental Market Dampeners	17
Model-Based Assumptions	18
Basic Market Drivers	18
Basic Market Dampeners.....	18