

Report Information

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High Performance Computing (HPC) Market Research Report- Forecast to 2032

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Description:

Global High Performance Computing Market Overview

High Performance Computing Market Size was valued at USD 39,145.2 million in 2022. The high-performance computing market industry is projected to grow from USD 42,154.3 million in 2023 to USD 78,254.5 million by 2032, exhibiting a compound annual growth rate (CAGR) of 7.1% during the forecast period (2023 - 2032). Increasing adoption of HPC in government, industrial, and enterprise applications.

Figure 1: HIGH PERFORMANCE COMPUTING MARKET SIZE (USD MILLION) 2018-2032

HIGH PERFORMANCE COMPUTING MARKET SIZE (USD MILLION) 2018-2032 11

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

High Performance Computing Market Trends

• Demand For HPC As a Service

The growth of big data and the significant demand for cloud computing technology are driving the demand for HPC as a Service. Machine-to-machine communication, internet of things proliferation, and other data-generating sources have led to the generation of huge amounts of data. In order to effectively process data, enterprises are looking for budget-friendly solutions. HPC as a service gives enterprises the capability to process such huge, unstructured data without investing huge sums in hardware implementation and management. As a part of HPC as a Service, a third-party provider completely manages the processing and analysis of data. Enterprises need not spend huge sums on the deployment of the entire architecture on-premises, empowering enterprises to access high-end computing power without the additional capital investment of building and maintaining their own HPC cluster. Vendors operating in the market can tap the opportunity by providing HPC as a service to enterprises, specifically mid- and small-sized enterprises operating across various industry verticals, including manufacturing, BFSI, retail, and IT. Few companies have been offering HPC as a service, thereby taking early mover advantage in this segment of the market. Among the companies are Advania, Intel, IBM, and UberCloud.

High Performance Computing Market Covid Impact

In 2020, the world was faced with a pandemic like never before, and this completely changed the way the world functions in the most fundamental ways. The pandemic adversely affected many aspects of life and rendered multiple markets unable to sustain huge losses in these times. Computing is playing a key role in combating the COVID-19 pandemic, as it has in other national catastrophes ranging from hurricanes, earthquakes, and oil spills to pandemics, wildfires, and even rapid turnaround modelling when space missions have been endangered, to increase the effectiveness and timeliness of these response.

High Performance Computing Market Russia-Ukraine War Impact

Russia's invasion of Ukraine and the ongoing effects of the pandemic had a negative and unclear impact on the world economy. Many of the downside risks mentioned in April World Economic Outlook have started to manifest. The world's financial conditions have become more rigid due to higher-than-expected inflation, particularly in the United States and major European nations. With COVID-19 outbreaks and lockdowns, China's recession has been greater than expected, and the conflict in Ukraine has had further detrimental effects.

High Performance Computing Market Segment Insights

High Performance Computing Component Insights

The High Performance Computing Market is segmented based on component and includes hardware, software, and services. The hardware segment dominated the market in 2022. The networking devices are part of the hardware, which is an essential component of high-performance computing. These include a computer node, interconnects for a network, and system management. Computer nodes include the most commonly used rack-mounted servers and blade servers. Other essential components include network switches, a power distribution unit, Ethernet, gateways, routers, and cables. Along with these, there is also the need for a serial port, a baseboard management controller, and a KVM for remote monitoring, among others.

November 2020 Intel cooperated with HPE, an American multinational enterprise information technology business, and Argonne, a science and engineering research national laboratory administered by the University of Chicago Argonne for the United States Department of Energy.

Figure 1: HIGH PERFORMANCE COMPUTING MARKET SIZE (USD MILLION) BY COMPONENT 2022 VS 2032



Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

High Performance Computing Deployment Insights

The High Performance Computing Market segmentation, based on deployment, includes on-premises and cloud. On-premises segments accounted for the largest market share in 2022. Although on-cloud deployment is an emerging and enhanced trend due to several benefits that it offers, including its scalability and flexibility in high-performance computing, on-premises deployment is considered safe and approachable for a number of enterprises. One of the major advantages of on-premises deployment over cloud deployment is that it is highly secure against cyberattacks and security breaches. Although the cost of maintenance is very high in terms of on-premise deployment, several enterprises prefer using on-premise deployment.

July 2021 Hewlett Packard Enterprise Expands HPE GreenLake Edge-to-Cloud Platform with the Purchase of Zerto, a Leader in Cloud Data Management and Protection.

Figure 2: HIGH PERFORMANCE COMPUTING MARKET SIZE (USD MILLION) BY DEPLOYMENT 2022 VS 2032



Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

High Performance Computing, By Vertical Insights

The High Performance Computing Market data has been bifurcated by Vertical into BFSI, chemicals, pharmaceutical, IT & telecom, retail, healthcare, transportation logistics, defense, oil and gas, manufacturing, energy & utility and others. The BFSI category maintained the biggest revenue share in 2022, as the banking, financial services, and insurance (BFSI) is a major sector that deals with huge volumes of sensitive customer data. Therefore, enterprises largely rely on high-performance computing technology for high-frequency trading, real-time analytics, and simulations to gather, store, and analyze a large amount of customer data. Banks and financial institutes are using high computing applications for instant execution, risk escalation, concerns regarding security, and gaining a competitive advantage in the market. This technology is estimated to show huge growth in the coming years.

April 2021 NVIDIA unveiled its first data centre CPU, an Arm-based processor that outperforms the current fastest servers on the most challenging AI and HPC applications.

Figure 3: HIGH PERFORMANCE COMPUTING MARKET SIZE (USD MILLION) BY VERTICAL 2022 VS 2032



Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

High Performance Computing Regional Insights

By region, the study segments the market into North America, Europe, Asia-Pacific, and the Rest of the World. The North America high performance computing market accounted for USD 10,358.4 million in 2021 and is expected to exhibit an XX% CAGR during the study period. A key factor driving the growth of the market is the continuous investments by various industries, including defense, transportation, manufacturing, BFSI, and retail, in high-performance computing technology. Additionally, the region is a hub for the largest buyers of supercomputers and has witnessed the presence of leading HPC vendors such as Dell EMC, Lenovo, and IBM, thereby making North America the largest revenue generator globally. North America is expected to register a CAGR of 4.9 % during the forecast period.

The countries considered in the scope of high performance computing market are US, Canada, Mexico, UK, Germany, France, Italy, Spain, Switzerland, Austria, Belgium, Denmark, Finland,

Greece, Hungary, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Slovakia, Sweden, Romania, Ireland, China, Japan, Singapore, Malaysia, Indonesia, Philippines, South Korea, Hong Kong, Macau, Singapore, Brunei, India, Australia & New Zealand, South Africa, Egypt, Nigeria, Saudi Arabia, Qatar, United Arab Emirates, Bahrain, Kuwait, and Oman, Brazil, Argentina, Chile, and others.

Figure 4: HIGH PERFORMANCE COMPUTING MARKET SIZE (USD MILLION) BY VERTICAL 2022 VS 2032

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

High Performance Computing Key Market Players & Competitive Insights

Key competitors are working on growth strategies, partnerships, and mergers and acquisitions in order to stay competitive by expanding their reach, developing market trends, making technological breakthroughs, and delivering services. The global high-performance computing (HPC) market is characterized by the presence of many global, regional, and local vendors. The market is highly competitive, with all the players competing to gain a higher market share.

Some of the major players operating in the global market include IBM Corporation, Hewlett Packard Enterprise Company, Intel Corporation, Microsoft Corporation, Cisco Systems, Inc., Inspur, Inc., Fujitsu Ltd, Oracle Corporation, Dell, Inc., and Dawning Information Industry Co. Ltd. and Others.

Key Companies in the High Performance Computing market include.

- IBM Corporation
- Hewlett Packard Enterprise Company
- Intel Corporation
- Microsoft Corporation
- Cisco Systems, Inc.
- Inspur, Inc.
- Fujitsu Ltd
- Oracle Corporation
- Dell, Inc.
- Dawning Information Industry Co.ltd
- Other Players

High Performance Computing Industry Developments

May 2022 Hewlett Packard Enterprise announced an expansion to develop its first European facility for HPC and AI systems in order to improve customer delivery and strengthen the region's supplier ecosystem. The new facility will produce and ship HPE Apollo systems as well as HPE Cray EX supercomputers.

February 2022 SambaNova has developed a new HPC-based solution to perform sentiment analysis, language translation, and entity recognition in financial services. Furthermore, financial industry rules have increased the demand for deploying dependable HPC systems to meet various compliance requirements. As a result, companies are implementing more durable, trustworthy, and secure HPC systems capable of producing high-end computing outputs.

January 2022 Lenovo Group Limited introduced Lenovo TruScale, a new solution that brings the power of on-premises supercomputing to enterprises of all sizes via a cloud-like experience. Furthermore, the TruScale portfolio gives HPC customers access to more great supercomputing capabilities, increasing the efficiency and speed with which researchers work to solve humanity's most crucial concerns.

High Performance Computing Market Segmentation

High Performance Computing, By Component Outlook

- Hardware
 - Servers

- Storage
 - Networking Device
- Software
 - Analytics
 - Database Management
 - Operating System
 - Others
- Services
 - Managed Services
 - Professional Services
 - Design and Implementation Services
 - Support and Maintenance Services

High Performance Computing, By Deployment Outlook

- On-premises
- Cloud

High Performance Computing, By Vertical Outlook

- BFSI
 - FinTech
 - Insurtech
- Chemicals
- Pharmaceutical
- IT & Telecom
- Retail
- Healthcare
- Transportation Logistics
 - Trucking
 - Air
 - Shipping
 - Rail
- Defense

- Oil And Gas
- Manufacturing
- Energy & Utility
- Others

High Performance Computing Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

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