



# High Performance Computing Market Trends and Industry Forecast 2014 - 2022

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High Performance Computing is a practice to aggregate computing power that delivers high performance capabilities in handling large number problems in science, business or engineering fields. HPC systems involve all types of servers and micro servers that are being used for highly computational or data intensive tasks. Currently, as HPC has been firmly linked to the economic competitiveness and scientific advances it is becoming important to nations. The worldwide study showcases, 97% of the companies have adopted supercomputing platforms and says that they won't survive without it.

Faster computing capabilities of micro servers or HPC systems, improved performance efficiency and smarter deployment & management with high quality of service are some key factors driving the growth of HPC market. The major challenges for these HPC systems are power, cooling system management and storage & data management. The importance of storage & data management would continue to grow in future. In additions to this, software hurdles continues to grow, which are restraining the growth of HPC market. HPC technology is being rapidly adopted by the academic institutions and various industries to build reliable and robust products that would enable to maintain a competitive edge in the business. Various vendors are also targeting to provide high performance converged technology solutions. As this trend is gaining significant relevance, the market is growing steadily and it would continue its growth in future.

## High Performance Computing market analysis by Components

HPC involves various components and some of them could be listed as Hardware and architecture, software and system management and professional services. Hardware components are the most essential parts in any HPC system. The efficiency of the system is totally dependent on the hardware entities in HPC. Hardware and architecture segment of HPC includes memory capacity (storage), energy management, servers and network devices. Servers consist of super computer, divisional, departmental & workgroup. Supercomputers and departmental units are the fastest elements to be sold in hardware and architecture section. Another essential component of HPC is software and management system. It comprises of middleware, programming tools, performance optimization tools, cluster management and fabric management. Finally, professional services provided are design & consulting, integration & deployment and Training & outsourcing.

## High Performance Computing market analysis by Deployment

The different types of deployment methods of HPC are Cloud based and on-premise based methods. Cloud deployment is most popular in the industry, as cloud-computing technologies are popularly adopted by the players in different industries. The research shows that cloud technology market is expected to grow due to its high adoption rate, while the usage on-premise deployment method would

decline slowly.

## High Performance Computing market analysis by Application

The major application sections of HPC are High Performance technical computing and High performance business computing. Technical computing of the HPC includes various sectors such as Government, Chemicals, Bio-sciences, Academic institutions, Consumer products, Energy, Electronics and Others. High performance data analysis is being used in government sector for national security & crime fighting. In addition to this, HPCs are used in fraud detection and customer acquisition/retention across other sectors. High Performance Business Computing includes media entertainment, online gaming, retail, financial service, ultra scale internet, transportation and others.

## High Performance Computing market analysis by Geography

The high performance computing market is being analyzed in different geographic regions such as North America, Europe, Asia-Pacific and LAMEA. North America is the largest market for HPC technology due to the technological advancements and early adoption of technology in the region followed by Europe.

## HIGH LEVEL ANALYSIS

Study of the market showcases the current market trends, market structures, driving factors, limitations and opportunities of the global HPC market. Porter's Five Force Model helps in analyzing the market forces, barriers, strengths, etc., of the global market. Bargaining power of the buyer is low as the product is highly differentiated and threat of backward integration is low. The suppliers in this market are more concentrated than buyers, due to which the bargaining power of suppliers is high. Threat of substitutes in the global market is high as the switching costs are minimal. As HPC is a novel concept, threat of new entrants in the industry is high, while, the moderate number of market players leads to moderate intersegment rivalry in the market. Value chain analysis helps in analyzing the role of key stakeholders in the supply chain of the market and would provide new entrants with knowledge about the value chain of the existing market.

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