Worldwide HPC 2014 Total Market Model and 2015-19 Forecast

Description: This Intersect360 Research report presents the 2014 total market model and five-year forecast for the overall High Performance Computing (HPC) market, including servers, storage, services, software, networks and other products. The forecast horizon is from 2015 through 2019, with compound annual growth rates (CAGRs) using 2014 as a base.

Intersect360 Research divides the HPC market into two super-segments: High Performance Technical Computing (HPTC) and High Performance Business Computing (HPBC). This report discusses high-level expectations for the total HPC market and for the two super-segments, with details down to the product-class level. In addition, this report provides historical, current, and future forecasted revenues for servers, storage, software, services and networks for both HPTC and HPBC.

Market indicators for 2014 were mixed, with supplier performance varied widely due to business reorganizations in some of the most important HPC server vendors. On the supplier side, the completed sale of IBM’s x86 server business to Lenovo was the most disruptive event. On the end-user side, HPC spending varied by economic sector, but overall 2014 turned out to be a year of moderate market growth, more in line with our long-term forecast.

We continue to believe the fundamental growth drivers of the HPC market remain strong. However, we believe that spending in public sectors is currently constrained by a long-term shift towards government austerity policies, particularly in the United States and Europe. Thus we expect commercial and industrial spending to become an increasingly important part of the overall HPC market, with HPTC lagging HPBC in growth due to its large public-sector constituency and greater maturity.

Some of the key findings of this report include:

- The total HPC market in 2014 was $29.4 billion, up 2.8% from 2013.

- The HPTC market segment represented $21.5 billion, up 2.2% from 2013; the HPBC market segment represented $7.9 billion up 4.5% from 2013.

- Intersect360 Research projects HPC revenue compound annual growth rate to be 4.2% from 2014 to 2019, reaching $36.1 billion at the end of the forecast period.

- HPTC contributed 73.1% of total HPC market revenues in 2014, with HPBC contributing the remaining 26.9%.

- Servers will continue to lead the market in terms of absolute revenue growth.

- The growth rate leader in HPC market is cloud/utility computing.

Contents: Technologies Covered in this Report:

1. HPC system elements
   - Systems, clusters
   - Server technologies

2. Storage elements
   - Storage systems

3. Interconnect elements
   - System interconnects

4. Software elements
   - Operating systems
5. Services

6. Cloud computing, grid computing, utility computing

7. Other technology trends
   - Big Data trends
   - Government programs or investment in HPC

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