

High Performance Computing (HPC) Chipset Market By Chip Type (CPU, GPU, FPGA, and ASIC): Global Opportunity Analysis and Industry Forecast, 2020–2027

<https://marketpublishers.com/r/H5919CFAA3F8EN.html>

Date: January 2021

Pages: 225

Price: US\$ 4,615.00 (Single User License)

ID: H5919CFAA3F8EN

Abstracts

The global HPC chipset market size is expected to reach \$13.68 billion by 2027 from \$4.30 billion in 2019, growing at a CAGR of 19.1% from 2020 to 2027. High performance computing (HPC) has a capability to process large datasets and perform complex calculations at high speeds. It usually refers to the practice of aggregating computing power in a way, which provides much higher performance than typical desktop computers or workstations to solve large problems in science, engineering, or business.

The CPU segment impacted negatively, due to COVID-19.

One of the best-known examples of HPC solutions is the supercomputer, which contains thousands of compute nodes that work together to complete one or more tasks. This is called parallel processing, which is similar to having thousands of PCs networked together, and combining compute power to complete tasks faster. Over the last decade, the HPC industry has witnessed use of graphical processing unit (GPU) in non-graphic applications such as general-purpose computing and programming languages & tools.

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Presently, the GPU segment has matured and is extensively used in both commercial &

scientific applications. Massive parallel processing capability of GPU drives its growth in the HPC chipset industry. GPU has rapidly evolved to become high performance accelerators for data- parallel computing. In addition, modern GPUs contain hundreds of processing units, which are capable of achieving up to 1 TFLOPS for single-precision (SP) arithmetic.

The most prominent factor that drives growth of the HPC chipset market include empowering high performance computing in the cloud sector. Cloud offers instantly available and scalable computing resources and almost unlimited storage at a reasonable cost. With the use of HPC in cloud, it helps to elevate performance, control costs, accelerate results, and run complex simulations against large datasets in fields such as aerodynamics, physics or pharmaceuticals; government initiatives; and increase in need for flexible computing services. HPC computing requires continuous efficiency & working of HPC clusters. Thus, HPC services enable complete control for users over computing infrastructure such as analysis software and operating systems.

In addition, flexible computing meets growth in demand from multinational corporations for networked cloud infrastructure services from single communication and IT services providers. Flexible computing offers a scalable and modular service for fast and easy provisioning of resources, which can scale up and down to meet fluctuating demand and dynamic business growth.

However, one of the major restraints of the market is high cost for setting and maintaining HPCs. There is a high capital expenditure involved, including hardware and software costs. The high cost of initial investments in HPC computing as well as maintenance restricts startups and SMEs from adopting the same. On the contrary, increasing focus toward hybrid HPC infrastructure is anticipated to provide lucrative opportunities for the industry.

Hybrid approach allows applications and components to interoperate across boundaries, between cloud instances and between architectures. A hybrid HPC infrastructure results in better efficiency, scalability, enhanced security, and better technology. Apart from this, it also resolves security and privacy concerns as well as lowers the maintenance cost. Therefore, rise in focus toward hybrid HPC infrastructure is expected to provide lucrative opportunities for the HPC chipset market.

High Performance Computing (HPC) Chipset Market

By Chip Type

CPU segment would grow at a highest CAGR of 25.8% during the forecast period

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Segment Overview

The global HPC chipset market is segmented into chip type and region. On the basis of chip type, it is classified into CPU, GPU, FPGA, and ASIC. Region wise, the HPC chipset market trends analyzed across North America (U.S., Canada, and Mexico), Europe (UK, Germany, Italy, France, Spain, and rest of Europe), Asia-Pacific (China, Japan, India, South Korea, and rest of Asia-Pacific), and LAMEA (Latin America, Middle East, and Africa). North America accounted for the highest share, owing to high development of supercomputers in the region.

High Performance Computing (HPC) Chipset Market

By Geography

2027 Asia-pacific

North America

Europe

Lamea

Asia-Pacific region would dominate the market with a highest CAGR of 20.0% during 2020 - 2027

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Top Impacting Factors

The most prominent factor that drives growth of the HPC chipset market includes empowering HPC in the cloud sector, government initiatives, and increase in need for

flexible computing services are the prominent factors that propel the HPC chipset market growth. However, high cost of HPC chipset restricts the market growth. Conversely, rise in focus toward hybrid HPC infrastructure is expected to create lucrative opportunities for the industry.

Competitive Analysis

Competitive analysis and profiles of the top key players such as Advanced Micro Devices (AMD), IBM, Hewlett Packard Enterprise (HPE), Intel Corporation, NVIDIA Corporation, Alphabet, Achronix Semiconductor, Cisco System, MediaTek Inc., and Lattice Semiconductor Corporation are provided in this report. These key players have adopted various strategies, such as product portfolio expansion, mergers & acquisitions, agreements, geographical expansion, and collaborations, to increase their market penetration and strengthen their foothold in the industry.

COVID-19 Impact Analysis

The global HPC chipset market size has been significantly impacted by the COVID-19 outbreak. New projects throughout the world have been stalled which, in turn, has declined the market growth. Moreover, owing to this pandemic, end-use industries are facing major challenges, which may slow down growth of the HPC chipset market.

The impact of COVID-19 on the HPC chipset market is temporary as just production and supply chain is stalled. Once the situation improves, production, supply chains, and demand for these products are expected to gradually increase. The current scenario is expected to provide opportunities for companies to think about ways to increase their production, research about technologies, and improve current products.

Some the leading countries such as the U.S., Japan, and Australia have joined the COVID-19 high performance computing consortium. The consortium pools supercomputing power and offers it to researchers to fight against the pandemic. In addition, this consortium would help aggregate computing capabilities from some of the most powerful and advanced computers in the world to help researchers everywhere better understand COVID-19, its causes, and potential cures.

Key Benefits For Stakeholders

This study comprises analytical depiction of the global HPC chipset market outlook along with the current trends and future

estimations to depict the imminent investment pockets.

The overall HPC chipset market analysis is determined to understand the profitable trends to gain a stronger foothold.

The report presents information related to key drivers, restraints, and HPC chipset market opportunities with a detailed impact analysis.

The current HPC chipset market forecast is quantitatively analyzed from 2019 to 2027 to benchmark the financial competency.

Porter's five forces analysis illustrates the potency of the buyers and the HPC chipset market share of key vendors.

The report includes the market trends and the market share of key vendors.

HPC Chipset Market Key Segments

By Chip Type

CPU

GPU

FPGA

ASIC

By Region

North America

U.S.

Canada

Mexico

Europe

UK

Germany

Italy

France

Spain

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Rest of Asia-Pacific

LAMEA

Latin America

Middle East

Africa

Key Market Players

Advanced Micro Devices (AMD)

IBM

Hewlett Packard Enterprise (HPE)

Intel Corporation

NVIDIA Corporation

Alphabet

Achronix Semiconductor

Cisco System

MediaTek Inc.

Lattice Semiconductor Corporation

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FIGURE 76.ALPHABET INC: REVENUE, 2017–2019 (\$MILLION)

FIGURE 77.ALPHABET INC: REVENUE SHARE BY SEGMENT, 2019 (%)

FIGURE 78.ALPHABET INC: REVENUE SHARE BY REGION, 2019 (%)

FIGURE 79.LATTICE SEMICONDUCTOR CORPORATION: 2017–2019 (\$MILLION)

FIGURE 80.LATTICE SEMICONDUCTOR CORPORATION: REVENUE, 2017–2019 (\$MILLION)

FIGURE 81.LATTICE SEMICONDUCTOR CORPORATION: REVENUE SHARE BY SEGMENT, 2019 (%)

FIGURE 82.LAATICE SEMICONDUCTOR CORPORATION: REVENUE SHARE BY REGION, 2019 (%)

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