

Global Data Center Accelerator Market Research Report 2024(Status and Outlook)

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Abstracts

Report Overview

A data center accelerator is a specialized hardware component designed to enhance computing performance in data centers, particularly in high-performance computing (HPC), artificial intelligence (AI), machine learning, and large-scale data processing tasks. These accelerators offload specific resource-intensive tasks from traditional central processing units (CPUs), allowing complex operations to be performed more efficiently. Types of data center accelerators include graphics processing units (GPUs), field-programmable gate arrays (FPGAs), application-specific integrated circuits (ASICs), and CPUs, which can be customized for specific workloads. These devices significantly improve the speed and efficiency of data centers by enhancing parallel processing, reducing latency, and increasing throughput, which is critical for modern applications such as AI model training, big data analytics, and cloud services.

The data center accelerator market is undergoing a major transformation driven by multiple development trends, and customized hardware, AI integration, and strategic data center expansion will dominate the accelerator and data center landscape in the future. The rise of self-developed chips by major cloud service providers such as Google, Amazon, Alibaba, and Microsoft. These companies are designing their own CPUs and AI acceleration chips to meet their specific needs, helping them optimize performance, reduce costs, and reduce reliance on traditional vendors such as Intel and AMD. AI accelerators such as GPUs, FPGAs, and ASICs are essential to meeting the parallel computing needs of advanced AI workloads, significantly improving computational efficiency for tasks such as training large language models.

The global Data Center Accelerator market was valued at USD 83.26 billion in 2023 and

is expected to reach USD 704.58 billion by the end of 2030, growing at a CAGR of 30.93% between 2024 and 2030. The data center accelerator market is driven by several key factors. The urgent need for fast and efficient data processing has led to increasing adoption of accelerators such as GPUs, FPGAs, and ASICs. These technologies help process increasingly complex data volumes from sources such as IoT devices and AI workloads. Second, the growing demand for cloud services has prompted cloud providers to use accelerators to improve performance and scalability, especially as hybrid and multi-cloud strategies become more common. In addition, AI investments have accelerated due to the rise of generative AI services, spurring large-scale infrastructure upgrades, including AI-specific hardware. Another key force is the emphasis on energy efficiency and sustainability, with accelerators helping to reduce power consumption in data centers, which is critical given the industry's high energy demands. Finally, the advent of 5G and edge computing is driving data centers to process data in real time, increasing reliance on low-latency accelerators to support emerging technologies such as autonomous systems and the Internet of Things.

At the same time, the data center accelerator market faces several key challenges. Power constraints are a major issue, with the growing demand for energy from AI and real-time data processing pushing the limits of existing infrastructure. While newer accelerators such as FPGAs and chiplets offer greater energy efficiency, significant upgrades to power supplies are still required. Another challenge is disruptions in the chip supply chain, which has been exacerbated by a global semiconductor shortage and geopolitical tensions, leading to delays in the deployment of critical infrastructure. Security and regulatory restrictions also present obstacles, as the need for secure, compliant computing in fields such as finance and healthcare could limit the adoption of cutting-edge technologies. Finally, the limited supply and high manufacturing complexity of advanced accelerators such as GPUs and ASICs, combined with their high costs, have hindered wider adoption, especially for AI inference tasks in data centers.

Segment by Type, the Data Center Accelerator can be split into GPU, CPU, FPGA, ASIC. In recent years, the GPU market share has achieved rapid growth, corresponding to the decline in the CPU market share. In 2023, the market share of the GPU sector has reached 44.36%, and will achieve the highest CAGR of 33.56% during the forecast period of 2024-2030. GPUs are very efficient in parallel processing, which is essential for AI, deep learning, and machine learning applications, enabling them to process large data sets faster than traditional CPUs. As AI and data-driven technologies become more prevalent in various industries, the demand for GPUs has surged, especially in data centers that need to quickly and efficiently process tasks such as training complex AI models. In addition, GPUs are more adaptable to increasingly common professional

workloads in areas such as natural language processing, image recognition, and autonomous systems. This shift to AI-centric applications has led to a decline in the CPU market share, as CPUs are optimized for general-purpose tasks but have difficulty matching the performance of GPUs in data-intensive applications. As more organizations prioritize AI, the dominance of GPUs will continue to grow rapidly.

By application, the Data Center Accelerator can be split into AI and Machine Learning, HPC and Others. The AI and Machine Learning segment's market share reached 57.81% in 2023, surpassing HPC and Others to become the main contributor to market revenue. As organizations increasingly rely on AI for tasks such as predictive analytics, natural language processing, and autonomous systems, the demand for high-performance data center infrastructure has increased significantly. Machine learning and deep learning models require powerful computing power, and accelerators such as GPUs, FPGAs, and ASICs are designed to provide this capability, making them an integral part of AI workloads. In contrast, the widespread application of AI technology in commercial and industrial fields has shifted the focus of the market. This trend is further driven by the rise of generative AI models (such as ChatGPT) and their applications in fields such as healthcare, finance, and manufacturing, positioning AI and machine learning as the main growth engine of the data center accelerator market.

On basis of geography, the Data Center Accelerator market is segmented into North America, Europe, Asia-Pacific, South America, Middle East and Africa, etc. Asia-Pacific holds the highest market share of 47.32%, followed by North America with 34.58%. Rapid digital transformation in countries such as China, India, and Japan, as well as government initiatives to support the development of artificial intelligence and smart city projects, have accelerated the adoption of advanced computing technologies. The Asia-Pacific region is home to a large number of technology giants such as Alibaba, Tencent, and Baidu, which have invested heavily in artificial intelligence and cloud infrastructure, further driving the demand for data center accelerators. In addition, the region's large population and growing internet usage have led to an explosion in data, requiring more powerful data centers to process and analyze information in real time. The region's manufacturing capabilities also enable it to produce accelerators in a cost-effective manner, giving it a competitive advantage.

According to estimates, the concentration indicators of the Data Center Accelerator market in 2023, CR5 and HHI, are 78.33% and 25.48%, respectively, highlighting a high concentration. The top five companies dominate the market, influencing pricing, technology trends, and product availability. Major companies such as NVIDIA, Intel, AMD, etc. have established considerable market share through continuous innovation,

extensive R&D, and strategic partnerships, solidifying their position in the competitive environment. Although the market is concentrated, it is not monopolized, allowing for some competition among a wider range of players, especially in emerging markets where demand for data center accelerators is surging. This competitive but concentrated environment affects the speed of adoption of new technologies and the operational efficiency of data centers in meeting growing consumer and enterprise demands. Currently, major players in the market include Nvidia Corporation, Intel Corporation, Advanced Micro Devices, Inc., Broadcom Inc., Marvell Technology Group Ltd., Enclave Technology, Lattice Semiconductor, Gyr Falcon Technology Inc., Achronix Semiconductor Corporation, LeapMind Inc., Graphcore, Others.

This report provides a deep insight into the global Data Center Accelerator market covering all its essential aspects. This ranges from a macro overview of the market to micro details of the market size, competitive landscape, development trend, niche market, key market drivers and challenges, SWOT analysis, value chain analysis, etc.

The analysis helps the reader to shape the competition within the industries and strategies for the competitive environment to enhance the potential profit. Furthermore, it provides a simple framework for evaluating and accessing the position of the business organization. The report structure also focuses on the competitive landscape of the Global Data Center Accelerator Market, this report introduces in detail the market share, market performance, product situation, operation situation, etc. of the main players, which helps the readers in the industry to identify the main competitors and deeply understand the competition pattern of the market.

In a word, this report is a must-read for industry players, investors, researchers, consultants, business strategists, and all those who have any kind of stake or are planning to foray into the Data Center Accelerator market in any manner.

Global Data Center Accelerator Market: Market Segmentation Analysis

The research report includes specific segments by region (country), manufacturers, Type, and Application. Market segmentation creates subsets of a market based on product type, end-user or application, Geographic, and other factors. By understanding the market segments, the decision-maker can leverage this targeting in the product, sales, and marketing strategies. Market segments can power your product development cycles by informing how you create product offerings for different segments.

Key Company

Nvidia Corporation

Intel Corporation

Advanced Micro Devices, Inc.

Broadcom Inc.

Marvell Technology Group Ltd.

Enclave Technology

Lattice Semiconductor

Gyr Falcon Technology Inc.

Achronix Semiconductor Corporation

LeapMind Inc.

Graphcore

Market Segmentation (by Type)

GPU

CPU

FPGA

ASIC

Market Segmentation (by Application)

AI and Machine Learning

HPC and Others

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Data Center Accelerator Market

Overview of the regional outlook of the Data Center Accelerator Market:

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value (USD Billion) data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Data Center Accelerator Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future

development prospects, market space, and capacity of each country in the world.

Chapter 9 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 10 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 11 provides a quantitative analysis of the market size and development potential of each market segment (product type and application) in the next five years.

Chapter 12 is the main points and conclusions of the report.

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