

# Global High-performance Computing Rental Market Growth (Status and Outlook) 2026-2032

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## Abstracts

The global High-performance Computing Rental market size is predicted to grow from US\$ 42324 million in 2025 to US\$ 157411 million in 2032; it is expected to grow at a CAGR of 20.7% from 2026 to 2032.

High-performance computing (HPC) leasing refers to the rental of high-performance computing resources comprising a large number of CPUs, GPUs, high-speed interconnects, parallel storage systems, and supercomputing clusters by enterprises, research institutions, or government departments through cloud platforms, supercomputing centers, data centers, or third-party service providers. Payments are made on an on-demand, time-based, project-based, or subscription basis. These resources are used to complete large-scale, complex computing tasks that traditional IT systems cannot efficiently handle. Its core objective is to achieve ultra-high computing power output through parallel computing and distributed architecture, with wide applications in fields such as artificial intelligence training, weather simulation, aerospace, gene sequencing, drug development, energy exploration, financial modeling, industrial simulation, nuclear fusion research, autonomous driving, and digital twins. Compared to enterprises building their own supercomputing centers, HPC leasing significantly reduces initial capital investment, shortens deployment cycles, and provides elastic expansion, resource sharing, and remote collaboration capabilities. Therefore, it has gradually become an important infrastructure service model for global scientific research and the AI industry.

The high-performance computing leasing industry is rapidly transforming from traditional scientific research infrastructure into the core computing power foundation for the AI era. With the rapid expansion of applications such as generative AI, large-scale model training, autonomous driving, biological computing, digital engineering, industrial

simulation, and climate simulation, the global demand for ultra-large-scale computing resources continues to surge. However, building one's own supercomputing system faces challenges such as expensive equipment, enormous energy consumption, complex operation and maintenance, and short upgrade cycles. As a result, more and more enterprises and research institutions are adopting the 'HPC as a Service (HPCaaS)' model to obtain elastic computing power. Simultaneously, cloud vendors, operators, and AI infrastructure companies are building next-generation GPU superclusters and AI supercomputing centers, gradually evolving HPC from traditional CPU supercomputing into an 'AI + GPU driven' intelligent computing system. In the future, HPC leasing will deeply integrate with AI, quantum computing, edge computing, and green energy, playing a crucial role in drug development, national defense security, industrial digitalization, and national strategic technological competition. With countries accelerating the construction of national-level supercomputing centers and AI sovereign computing networks, the HPC leasing market is expected to maintain rapid growth in the long term.

United States market for High-performance Computing Rental is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for High-performance Computing Rental is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for High-performance Computing Rental is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key High-performance Computing Rental players cover Amazon Web Services, Google Cloud Platform, Microsoft Azure, RunPod, Vast.ai, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LPI (LP Information)' newest research report, the 'High-performance Computing Rental Industry Forecast' looks at past sales and reviews total world High-performance Computing Rental sales in 2025, providing a comprehensive analysis by region and market sector of projected High-performance Computing Rental sales for 2026 through 2032. With High-performance Computing Rental sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world High-performance Computing Rental industry.

This Insight Report provides a comprehensive analysis of the global High-performance

Computing Rental landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on High-performance Computing Rental portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global High-performance Computing Rental market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for High-performance Computing Rental and breaks down the forecast by Computing Architectures, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global High-performance Computing Rental.

This report presents a comprehensive overview, market shares, and growth opportunities of High-performance Computing Rental market by product type, application, key players and key regions and countries.

Segmentation by Computing Architectures:

CPU-based HPC Leasing

GPU-based HPC Leasing

HPC Hybrid Architecture Leasing

Segmentation by Deployment Mode:

Public Cloud CaaS

Private Cloud CaaS

Hybrid Cloud CaaS

Segmentation by Application:

AI Technology Companies

Biomedicine

Aerospace

Energy

Automotive

Finance

Defense and Nuclear Industry

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Amazon Web Services

Google Cloud Platform

Microsoft Azure

RunPod

Vast.ai

KT Cloud

NHN Cloud

Oracle

IBM

NVIDIA

DigitalOcean

Nebius

Fluidstack

OVHcloud

Sea Group

CoreWeave

Paperspace

Sakura Internet

Hetzner

Scaleway

Gcore

Fujitsu

NTT

Lambda Labs

Naver Cloud

Singtel

Tata Communications

Alibaba

Tencent

Baidu

China Telecom

Seednet

Jiangsu Lettall Electronic Co., Ltd.

Three Company

Hangzhou Anysoft

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