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High Performance Computing Market by Component (Solutions (Servers, Storage, Networking Devices, and Software), and Services], Deployment Type, Organization Size, Server Price Band, Application Area, and Region - Global Forecast to 2022

https://marketpublishers.com/r/H432921D864EN.html
Date: February 2018
Pages: 134
Price: US$ 5,650.00 (Single User License)
ID: H432921D864EN

Abstracts

"The growing requirement to process large volumes of data with speed and accuracy has fueled the adoption of HPC solutions"

The global high performance computing (HPC) market is expected to grow from USD 32.11 billion in 2017 to USD 44.98 billion by 2022, at a Compound Annual Growth Rate (CAGR) of 7.0% during the forecast period. Organizations in various verticals, such as manufacturing, energy and utilities, chemicals, government and defense, and education, need to resolve complex problems and calculations. HPC solutions can handle vast volumes of data with ease and can extensively support high performance data analysis. Moreover, these solutions can provide for faster processing of data with high accuracy. These benefits offered by HPC solutions have further propelled the adoption of these solutions across industry verticals. However, concerns related to data security may affect the adoption rate of these solutions.

"The server solutions segment is expected to hold the largest market size during the forecast period"

Organizations across various industries are facing a pressing need to deliver high-density, cost-effective, and robust servers in their data center infrastructures. Organizations require hardware that supports dynamic workloads from applications, such as Web 2.0 and cloud hosting. The HPC servers can deliver core count, increased frequency, rapid calculations, scalability, and power efficiency required for these high-

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end applications.

“The government and defense application area is expected to hold the largest market share during the forecast period”

Consumers in the government and defense application area have requirements pertaining to seamless delivery and faster response times while availing services related to the government initiatives. HPC solutions can help address a wide spectrum of defense-related requirements including real-time data acquisition and analysis, emergency operations preparation, disaster modeling and analysis, simulations, surveillance, and encryption/decryption of confidential information.

“North America is estimated to have the largest market share in 2017, whereas Asia Pacific (APAC) is projected to grow at the highest rate during the forecast period”

North America is estimated to hold the largest market share in 2017, and the trend is likely to continue during the forecast period. Growing adoption of HPC solutions and services in SMEs and large enterprises is driving the HPC market growth in this region. Moreover, the increasing regulatory requirements have significantly driven the US HPC market. On the other hand, the HPC market in APAC is expected to witness an exponential growth and is projected to be one of the fastest growing regions in the global HPC market. This is mainly due to the large scale adoption of cloud-based HPC solutions in these regions.

In the process of determining and verifying the market size for several segments and subsegments gathered through secondary research, extensive primary interviews were conducted with the key people. The breakup of the profiles of the primary participants is given below:

By Company Type: Tier I: 49%, Tier II: 27%, and Tier III: 24%

By Designation: C Level: 44%, D Level: 40%, and Others: 16%

By Region: North America: 32%, Europe: 26%, APAC: 20%, MEA: 12% and Latin America: 10%

The key vendors profiled in the report are as follows:

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1. AMD (US)
2. Atos (France)
3. AWS (US)
4. Cisco Systems (US)
5. Cray (US)
6. DDN (US)
7. Dell (US)
8. Fujitsu (Japan)
9. Hitachi Vantara (US)
10. HPE (US)
11. Huawei (China)
12. IBM (US)
13. Inspur (China)
14. Intel (US)
15. Lenovo (US)
16. Microsoft (US)
17. NEC (Japan)
18. NetApp (US)
19. NVIDIA (US)
20. Oracle (US)
21. Panasas (US)
22. Penguin Computing (US)
23. Spectra Logic (US)
24. Sugon (China)
25. Xilinx (US)

Research Coverage

The market is segmented by components (solution and services). The solutions segment includes servers, storage, networking devices, and software. The services segment includes design and consulting; integration and deployment; and support, maintenance, and management. The deployment type segment includes on-premises and cloud. The organization size segment includes Small and Medium-sized Enterprises (SMEs) and Large enterprises. The server price band segment includes USD 250,000–500,000 and above, and USD 250,000–100,000 and below. The application areas segment includes government and defense, BFSI, education and research, manufacturing, media and entertainment, healthcare and life sciences, energy and utilities, earth sciences, and others (travel and hospitality, and retail).

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The report will help the market leaders/new entrants in the following ways:

1. The report segments the HPC market comprehensively and provides the closest approximations of the revenue numbers for the overall market and subsegments across different industries and regions.
2. The report will help stakeholders understand the pulse of the market and provide them information on the key market drivers, restraints, challenges, and opportunities.
3. The report will help stakeholders better understand their competitors and gain more insights to enhance their position in the market. The competitive landscape section includes new product launches, partnerships, agreements and collaborations, mergers and acquisitions, and expansions related to the HPC market.

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About

With the increase in the number of complex applications in nearly each and every process of business or research has significantly augmented the demand of high performance computing. Complex applications such as scanning more than100,000 molecules every day, design and modeling for aircraft manufacturers, simulation and testing of new automotive devices, seismic and genomic analysis, quantitative financial analysis and designing of various workflows for product development, are getting increasingly dependent on High-performance Computing (HPC). This technology has allowed industries and academic institutions to develop robust and reliable products and services, thus enabling them to maintain the competitive edge in the businesses. The rising demand of high performance computing has led to the development of new technologies and solutions. Some of these new technologies are exascale supercomputers, embedded processors, networking technology, non-volatile memory and hot water cooling. With the rapid development of new technologies, the new vendors are emerging in the market especially in the area of cloud computing. Also the vendors are focusing on providing the high performance computing solutions converged with big data technologies. This latest trend is gaining significant traction and growing steadily.

Prominent vendors in the high performance computing space include IBM. HP. Oracle. Cray and Dell, while companies such as Terascala, Cycle Computing and Sabalcore Computing emerge as key innovators in this space. The high performance computing market research report analyzes market dynamics, technology evolution and global trends, and also provides the latest developments and forecasts over the next five years. The report segments the high performance computing market by cloud computing solutions: on premise and cloud; by components and professional services: servers, storage devices, networking devices, design and consulting services, integration and deployment services and training and outsourcing services; by end users: manufacturing, government and defense, academic institutions, web. media and entertainment, retail, bio sciences, chemical, gaming, transportation and logistics, Banking Financial Services and Insurance (BFSI) institutions, weather and energy and natural resources; by regions: North America (N A). Asia Pacific (APAC), Europe (EU), Middle East and Africa (MEA) and Latin America (LA).

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