

HPC Market Report and Forecast

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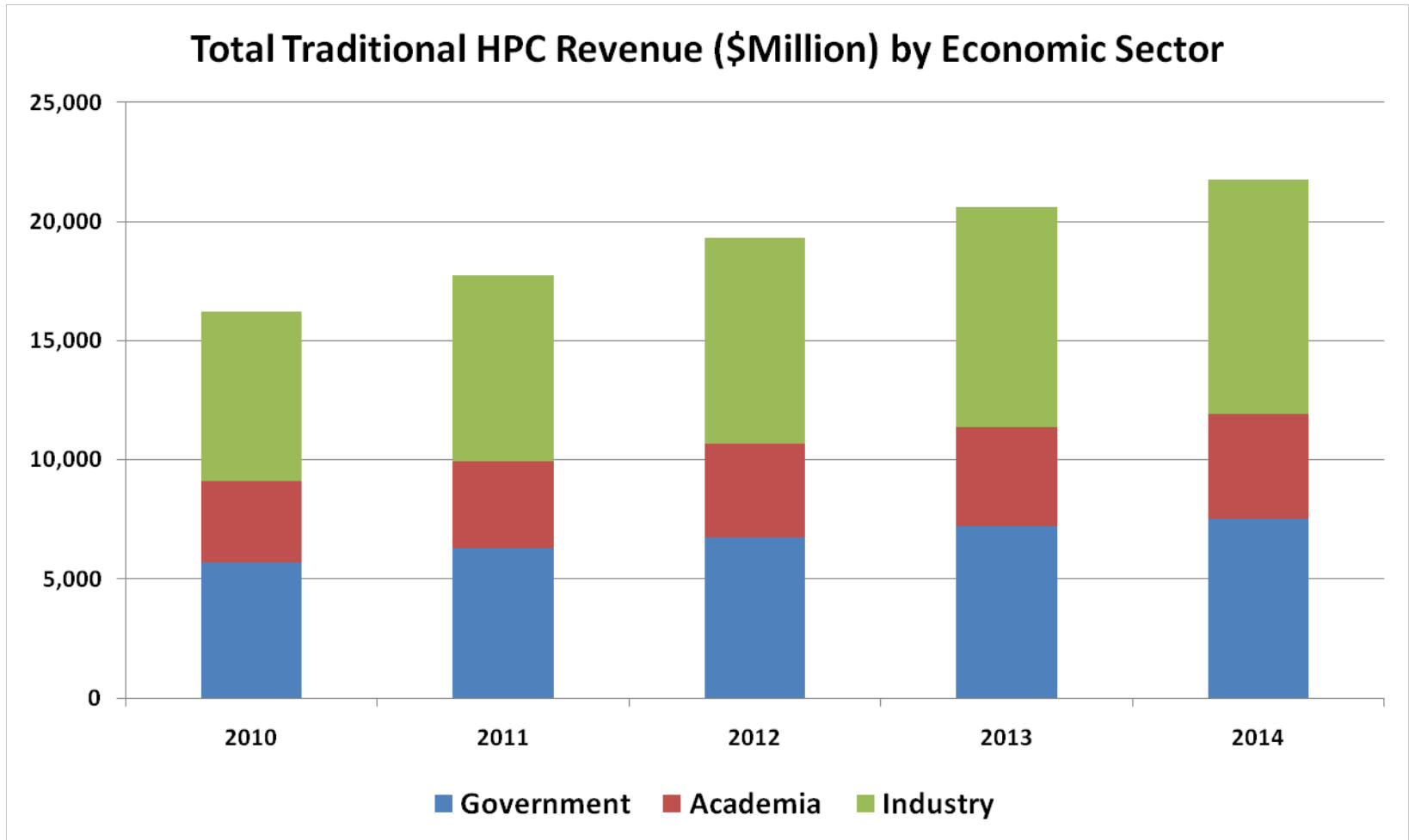
- **This presentation provides information on the Traditional HPC Market State and Forecast 2010 to 2014**
 - The traditional HPC market covers 70% of the total HPC market (does not cover leading edge environments)
- **The info is provided on behalf of the HPC Advisory Council**
 - As a service to its members and the HPC community
- **The author would like to express great appreciation to Intersect360 Research for their support and information**
 - For more information, please refer to www.Intersect360.com



- **Methodology incorporates inclusive views of the technology and applications in the HPC market**
- **Spending:**
 - Products: servers, interconnects, storage, software etc.
 - Services: support, professional services
 - Utility: cloud, grid, SaaS, HPC as a service etc.
 - Internal: staffing, facilities, power, cooling
- **Usage models:**
 - Traditional HPC: Science, engineering, analytics
 - Edge HPC: Complex event processing, business process optimization, virtual environments, ultrascale business computing
- **This forecast covers the Traditional HPC market**

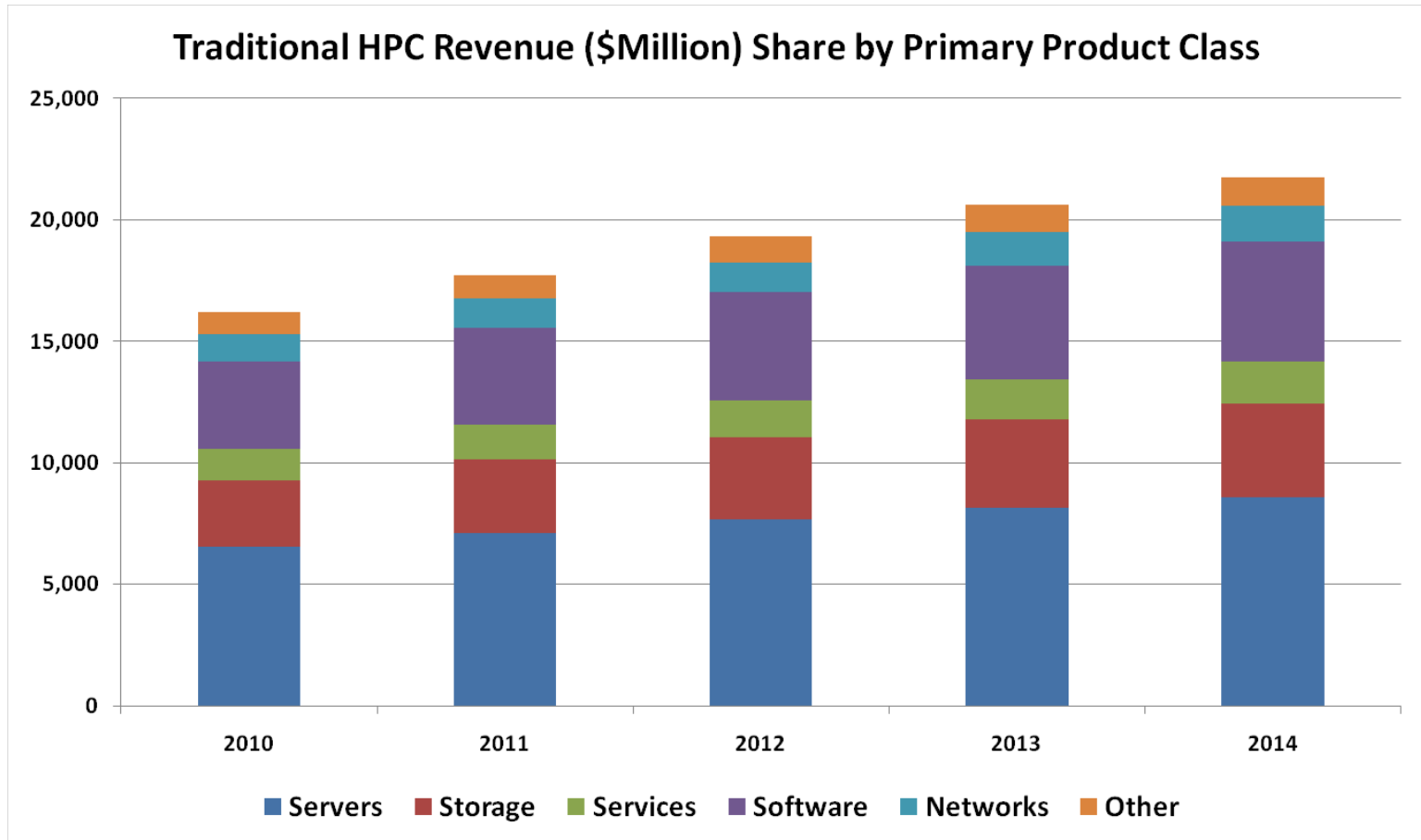
- **Traditional HPC market covers 70% of the HPC market**
- **Traditional HPC market will grow to \$21.8 billion in 2014**
 - At 7.8% CAGR 2010-2014
 - Adding about \$6.8 billion over the forecast period
 - Government and Academia covers ~55% of the market
 - Industry covers ~45% of the market
- **HPC storage is expected to show strong growth**
 - 9.2% CAGR 2010-2014 and to increase to about \$4 billion
 - Growth driven by the HPC “data explosion”
 - Requirements for more accurate models, expanded and improved data sources and increases in data-oriented research
- **2010 forecast**
 - Servers \$6.5B, Storage \$2.8B, Software \$3.6B, Networks \$1.2B

Traditional HPC Market Revenue - Sector



Source: Intersect360 Research, 2010

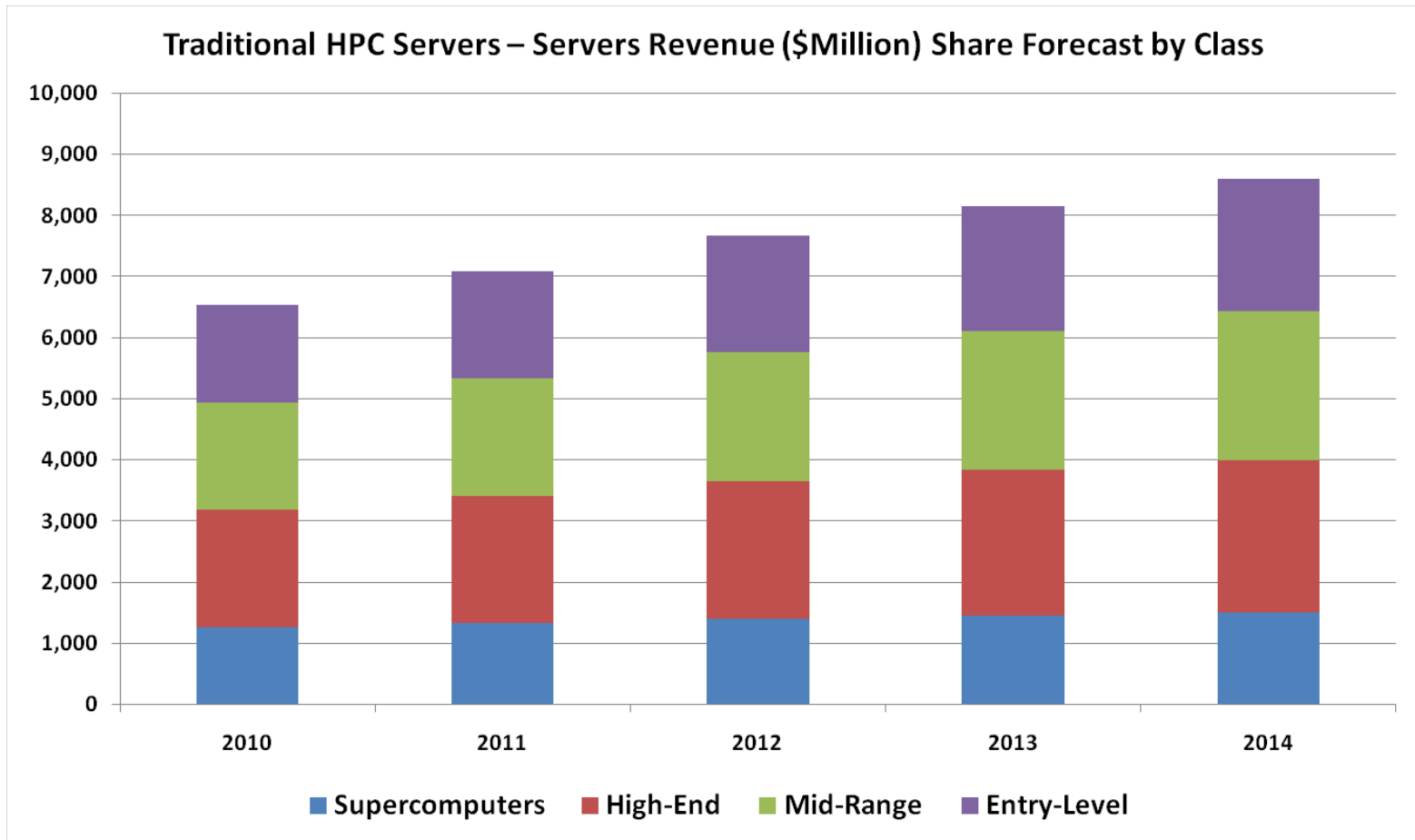
Traditional HPC Market Revenue - Products



- **2010 numbers**

- Servers \$6.5B, Storage \$2.8B, Services \$1.3B, Software \$3.6B, Networks \$1.2B

Source: Intersect360 Research, 2010



- **In average**
 - Supercomputers 19%, High-End 30%, Mid-Range 26%, Entry-Level 25%

Source: Intersect360 Research, 2010

Traditional HPC Market – Regional Revenue Share Forecast

	2010	2011	2012	2013
North America	53.6%	52.3%	51.2%	50.2%
EMEA	28.5%	29.5%	30.2%	30.9%
Asia-Pacific	14.7%	15.1%	15.5%	16.0%
Latin America	3.2%	3.1%	3.1%	2.9%
Total	100.0%	100.0%	100.0%	100.0%

- **North America continues to account for major HPC installations**
- **2010-2014 CAGR**
 - North America 6.9%, EMEA 8.9%, Asia-Pacific 8.9%, Latin America 2.7%

Source: Intersect360 Research, 2010

For more information

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