



## IDC Presentation

# Market Analysis Perspective: Worldwide HPC, 2014 — Directions, Trends, and Customer Requirements

Earl C. Joseph, Ph.D.  
Robert Sorensen

Steve Conway

## IN THIS IDC PRESENTATION

---

This IDC Presentation includes market sizing, market share, segmentation, tracking, trending, datacenter issues, and vendor analysis for multiuser technical server technology. IDC's HPC technical computing team drives research and consulting efforts associated with the United States, Europe, and Asia/Pacific markets for technical servers and supercomputers, clouds, visualization, and clustering. For 2014, the top issues identified by the team in the HPC sector are:

- 2013 HPC server market declined by over 7% to \$10.3 billion, mainly because of a few very large systems sales in 2012 that weren't repeated in 2013.
- 2014 is looking like another down year, but IDC expects growth in the 2015-2018 period.
- Software issues continue to grow.
- The worldwide exascale development race is at full speed.
- GPUs and accelerators are expanding technologies.

And some of the issues that we will be looking at more closely in 2015 are:

- Non-x86 processors altering the landscape: ARM, Power, and others
- China looms large(r): Lenovo expands, growing domestic market, and export intentions
- HPC in the cloud gaining traction: Impact on HPC technology options – How much and how soon?

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

## Global Headquarters

5 Speen Street  
Framingham, MA 01701  
USA  
508.872.8200  
Twitter: @IDC  
[idc-insights-community.com](http://idc-insights-community.com)  
[www.idc.com](http://www.idc.com)

---

### Copyright Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, telebriefings, and conferences. Visit [www.idc.com](http://www.idc.com) to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit [www.idc.com/offices](http://www.idc.com/offices). Please contact the IDC Hotline at 800.343.4952, ext. 7988 (or +1.508.988.7988) or [sales@idc.com](mailto:sales@idc.com) for information on applying the price of this document toward the purchase of an IDC service or for information on additional copies or Web rights.

Copyright 2014 IDC. Reproduction is forbidden unless authorized. All rights reserved.

