

Multi-Client Study

2020 HPC Multi-Client Study: Servers, Processors, and Coprocessors

Bob Sorensen, Melissa Riddle, Alex Norton, and Earl Joseph
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This annual study is part of the sixth edition of Hyperion Research's high-performance computing (HPC) end-user-based tracking of the HPC marketplace. It covers 194 user sites with 1,849 HPC systems. This report focuses on servers, processors, and coprocessors.

HYPERION RESEARCH OPINION

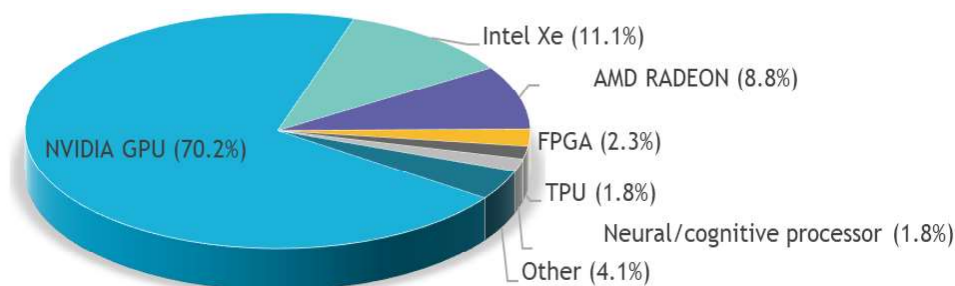
This document explores the HPC market for servers, processors, and coprocessors, including five-year server revenue forecasts. Overall, worldwide revenue for the HPC technical server market grew 0.2% in 2019 to a record \$13.7 billion. Current projections, including the impact of the covid-19 pandemic, call for growth at a CAGR of 5.9% between 2019 and 2024, reaching total revenues of \$18.3 billion by 2024.

Report highlights include:

- Budgets for public HPC cloud computing and storage resources will grow faster than on-prem counterparts.
- Intel x86 is the preferred processor for respondents' next technical server purchase, but a significant percentage of survey respondents indicated a preference for alternate processor options including AMD, IBM Power, and ARM.
- More than two-thirds of respondents use coprocessors in their HPC system and almost 90% plan to incorporate an accelerator in their next technical server purchase. Figure 1 shows the GPU/accelerator/coprocessor preference for next technical server.

FIGURE 1

GPU/Accelerator/Coprocessor Preferences



Note: n=171

Source: Hyperion Research, 2020

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Hyperion Research provides data-driven research, analysis and recommendations for technologies, applications, and markets in high performance computing and emerging technology areas to help organizations worldwide make effective decisions and seize growth opportunities. Research includes market sizing and forecasting, share tracking, segmentation, technology and related trend analysis, and both user & vendor analysis for multi-user technical server technology used for HPC and HPDA (high performance data analysis). We provide thought leadership and practical guidance for users, vendors and other members of the HPC community by focusing on key market and technology trends across government, industry, commerce, and academia.

Headquarters

365 Summit Avenue
St. Paul, MN 55102
USA

612.812.5798

www.HyperionResearch.com and www.hpcuserforum.com

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