

## Multi-Client Study

# 2020 HPC Multi-Client Study: Vertical/Application Workload Areas

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July 2020

*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 applications and workloads.*

## HYPERION RESEARCH OPINION

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This document explores the application areas/verticals segments of the HPC market, including five-year forecasts for each area. Most of the application areas are expected to show healthy growth over the next 5 years, resulting in 9 application segments worth over \$1 billion each in 2024.

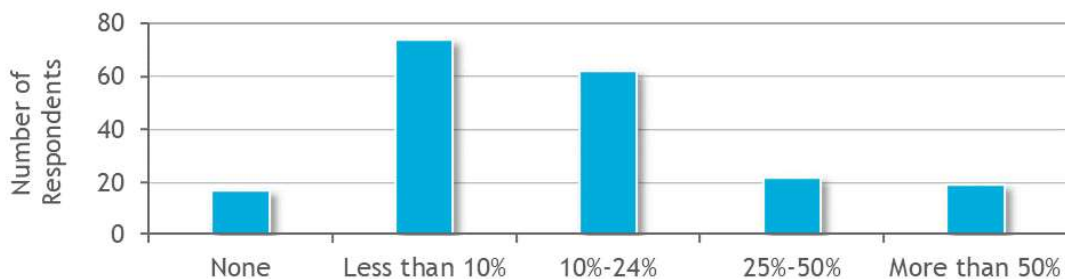
Report highlights include:

- The largest vertical/application areas are Government Labs and University/Academic, followed by CAE, Bio-Sciences, and Defense.
- In 2019, paid HPC application software was valued at nearly \$4.7 billion, 16.8% of the overall HPC market.
- 91.2% of respondents use at least one open source application.
- The HPC application software market is forecasted to grow at a 7.3% CAGR through 2024 to reach nearly \$6.7 billion.
- Figure 1 shows the use of AI applications at HPC sites as a percentage of their overall total workload.

## FIGURE 1

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### AI Application Use as Percent of Total Workload



Note: n=194

Source: Hyperion Research, 2020

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## About Hyperion Research, LLC

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.

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