

Programmable Ethernet adapter market & trends

Napatech Investor Conference

March 2021

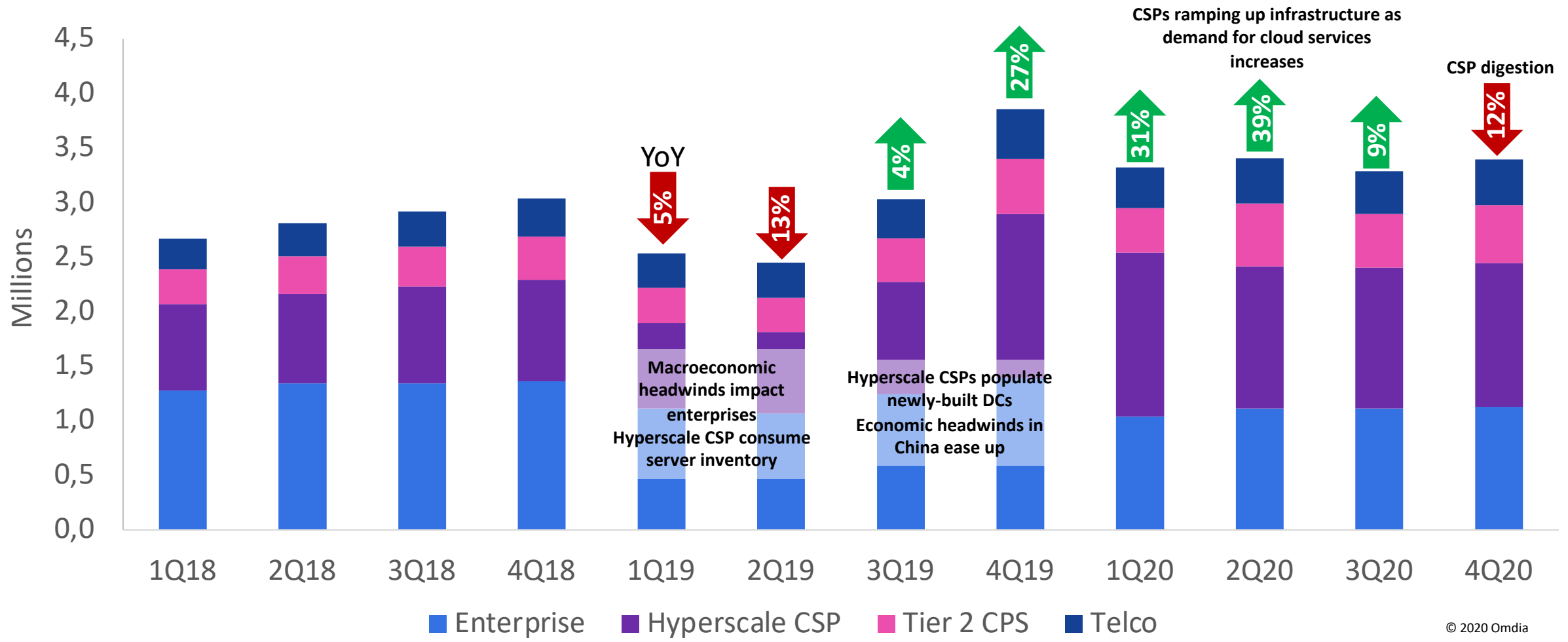
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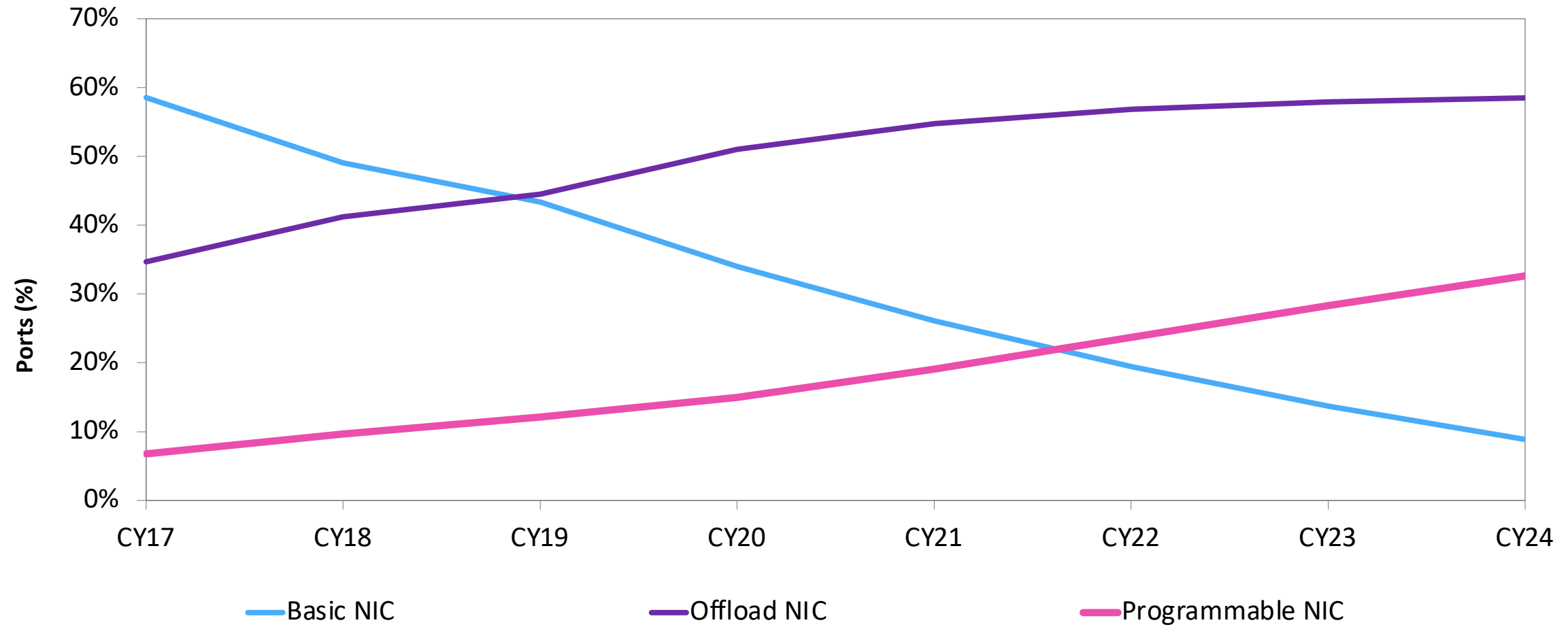
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COVID-19 impact on the data center compute market

Quarterly server shipments

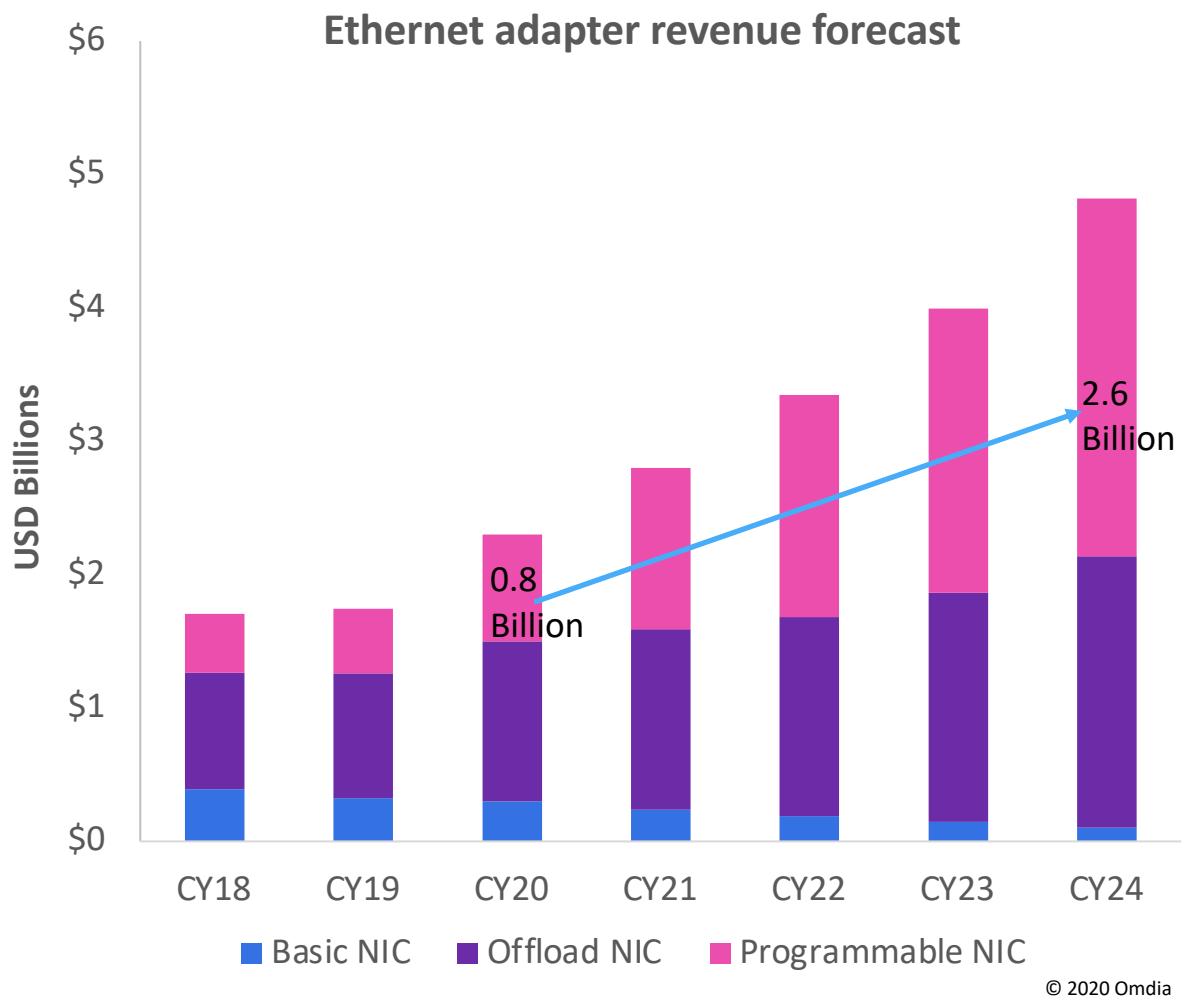
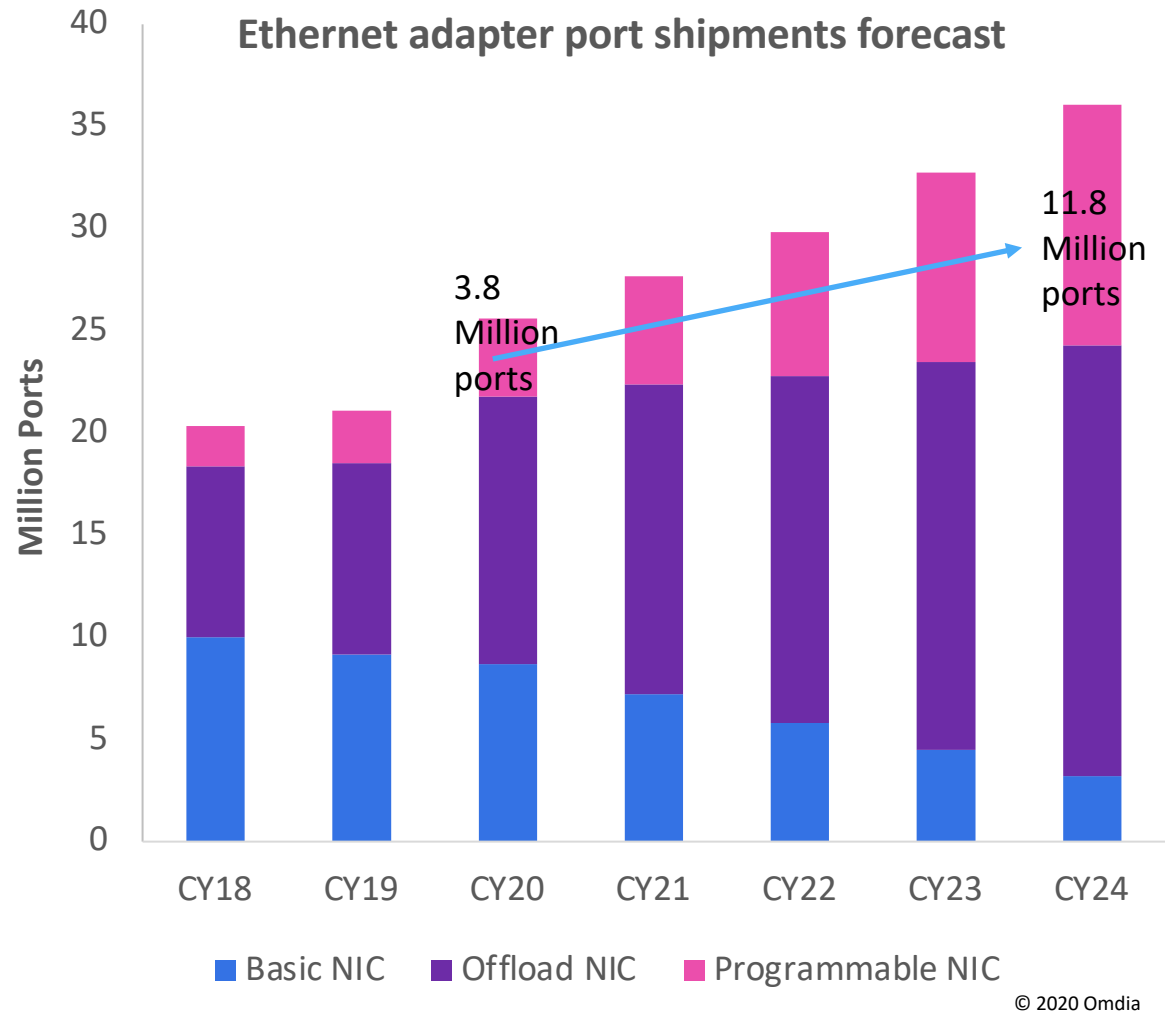


DC Ethernet adapter port forecast by CPU offload

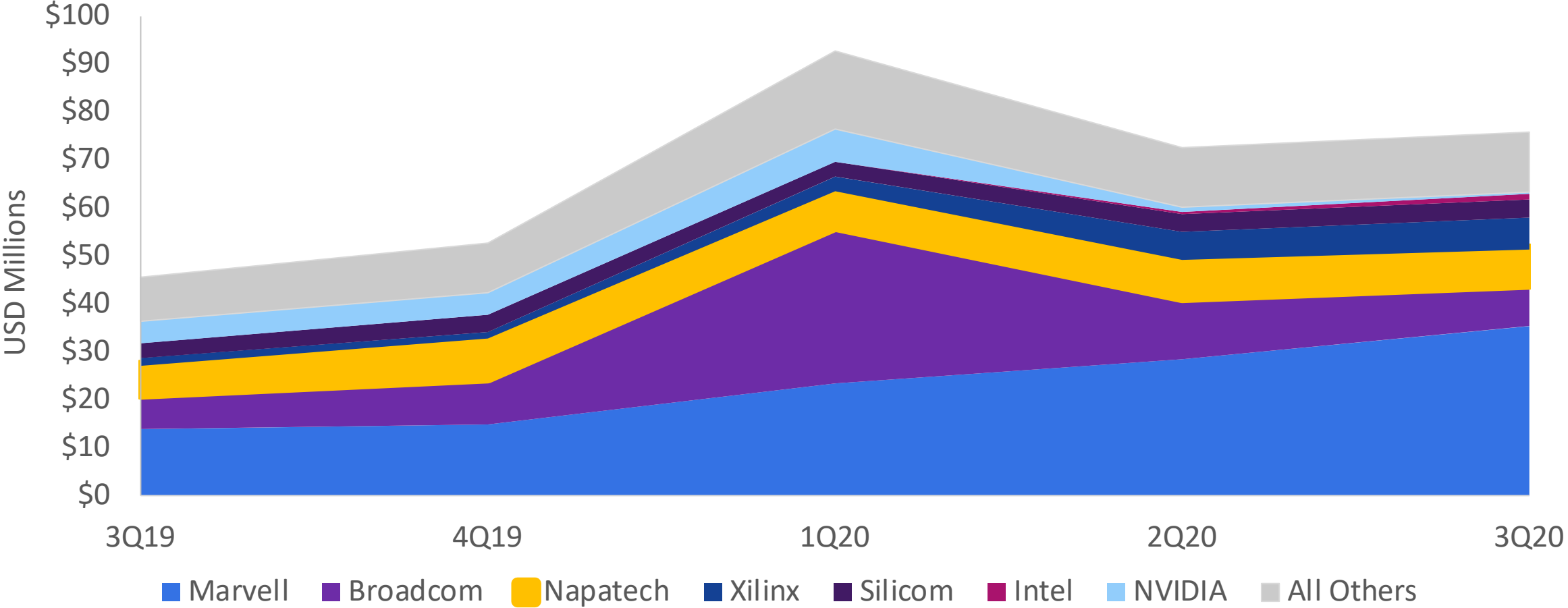


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Programmable NIC deployments drive revenue growth



Programmable ethernet adapter revenue market share trend (excl. AMZN and MSFT)



Final thoughts



A booming market

All CSP will deploy programmable NICs. Use cases grow as vendors port their software to programmable adapters



Software to be a key differentiator

Optimized software for specific workloads would be a key differentiator for enterprise and telco adoption



Expect more disruptions

Programmable adapters are still in its infancy and more application, use cases and disruptions are expected

Questions?




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Thank You

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