

The GPU rich vs the GPU poor

Overview

1

Recap on GPUs

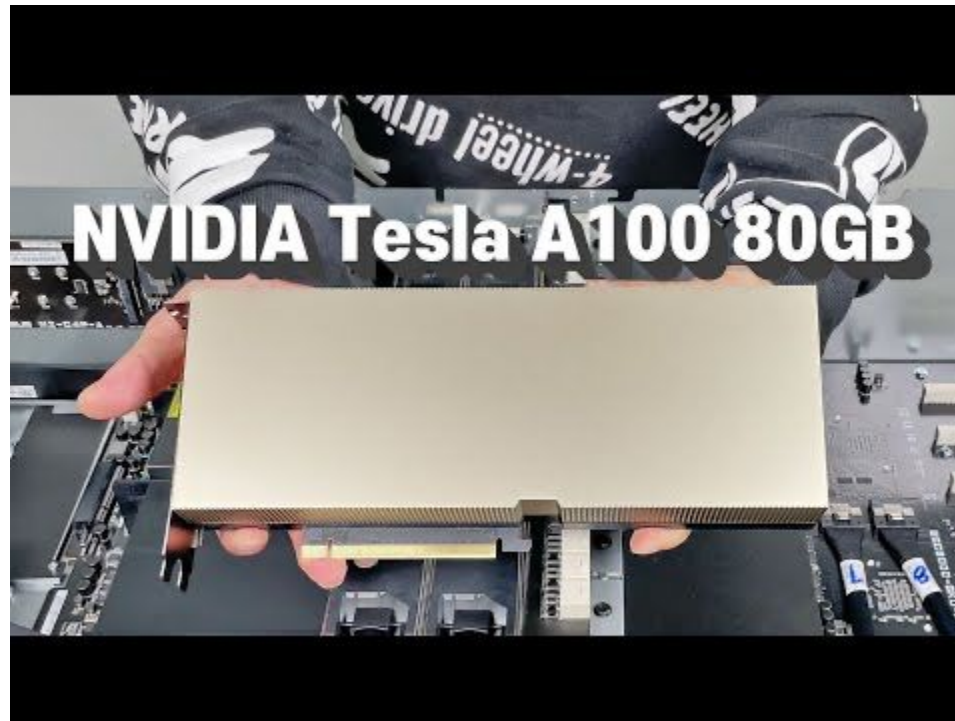
2

GPU rich vs GPU poor

3

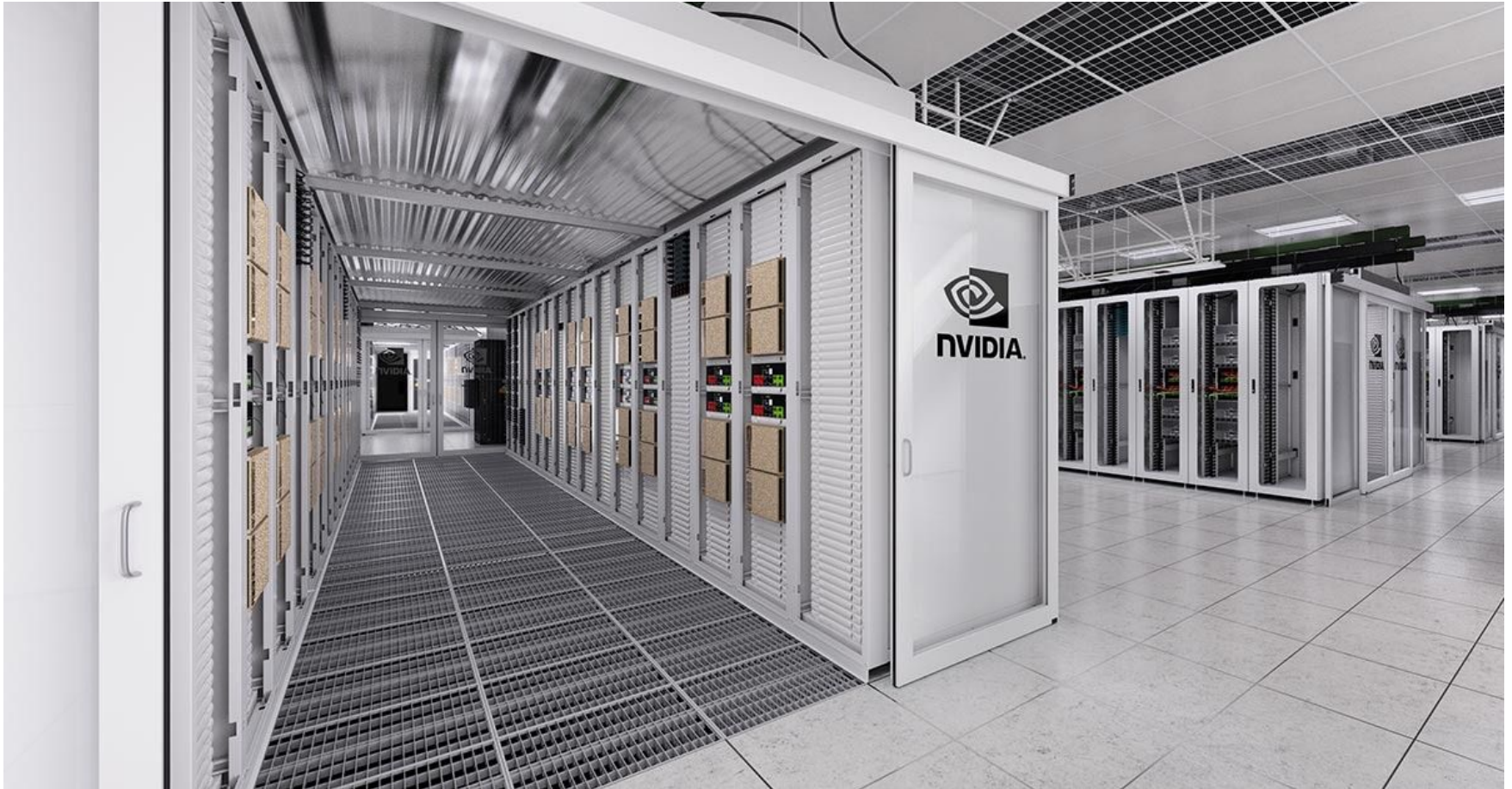
...

The GPU



[Source](#)

Data Centres



[Source](#)

GPUs are the new oil



[Source](#)

Big orders for GPUs

Nvidia H100 GPU Shipments by Customer

Estimated 2023 H100 shipments by end customer.

Omdia estimates Nvidia sold ~500k A100 and H100 GPUs in Q3, and lead time for H100-based servers is up to 52 weeks.



Source: Omdia Research

[Source](#)

GPU rich vs GPU poor

Discuss

What is the most important step...



Source

Cloud computing

colab

[Source](#)

Recap questions

1. What are GPUs
2. What makes them special?
3. Why are they so expensive?
4. Who is buying the most?
5. What are the consequences of GPUs being so expensive?
6. Which country has a unique position in the GPU manufacturing path and why?