W.S.P
WORLD SCAN PROJECT

ZEXA CLUSTER business in the CPU market

NOVEMBER 2025

1. ZEXA CLUSTER Product Overview

The World's First
Tap Water-Cooled Computer
ZEXA CLUSTER

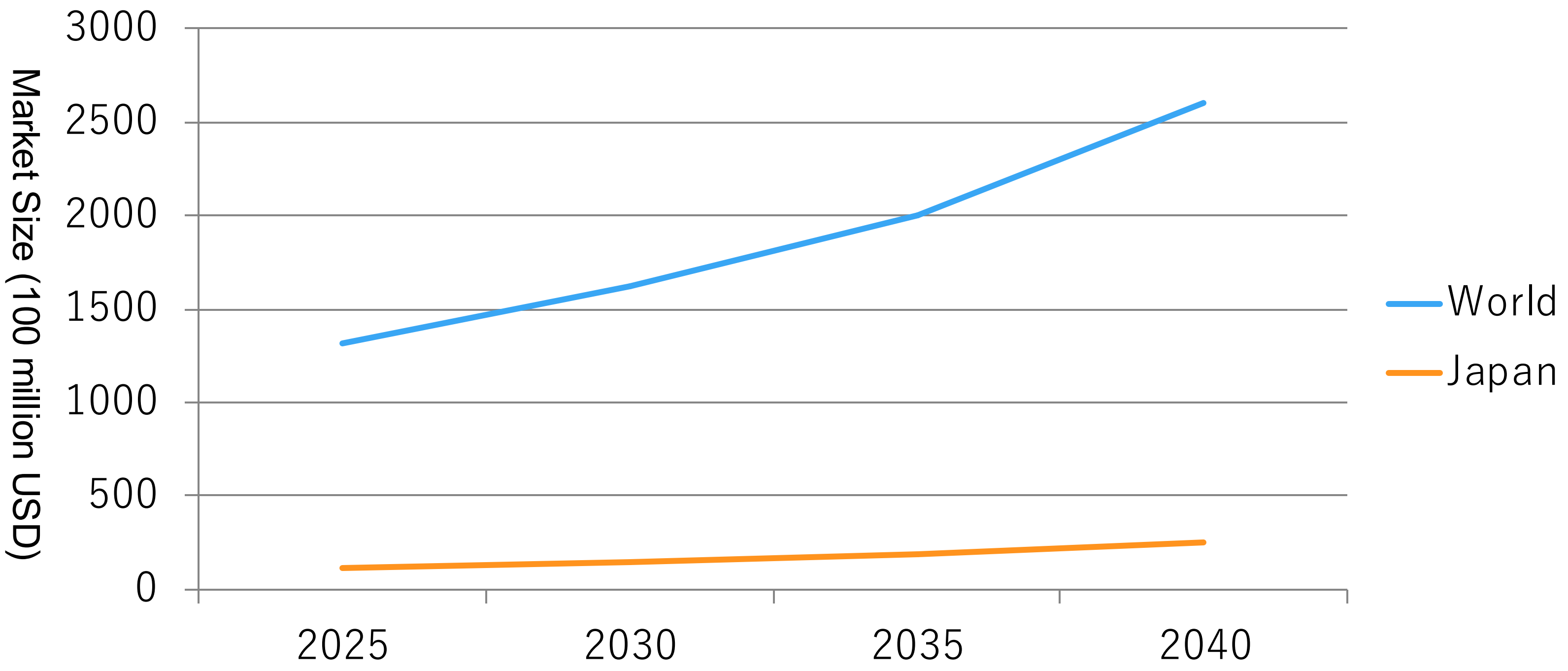
Traditionally, connecting a large number of CPUs simultaneously and continuously to AI agents required high-density CPU boards, which in turn created a challenge with heat generation from closely packed CPUs.
With air-cooling systems, a large physical footprint is needed.

ZEXA CLUSTER is a space-saving system that solves all of this within a single indoor environment.

2. CPU Market Trends

Unit: 100 million USD

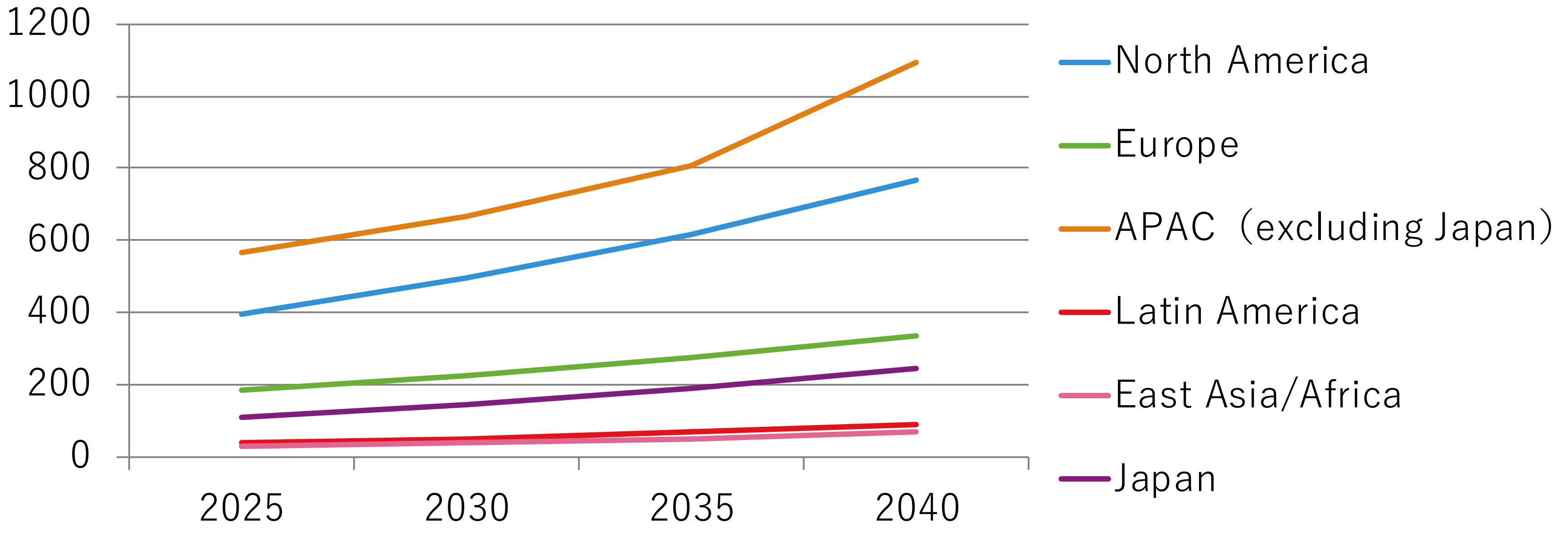
	World Market	Japan Market	Japan Share（%）
2025	1,320	110	8%
2030	1,620	144	9%
2035	2,000	188	9%
2040	2,600	246	9%



3. Market trends by region and in Japan

Unit: 100 million USD

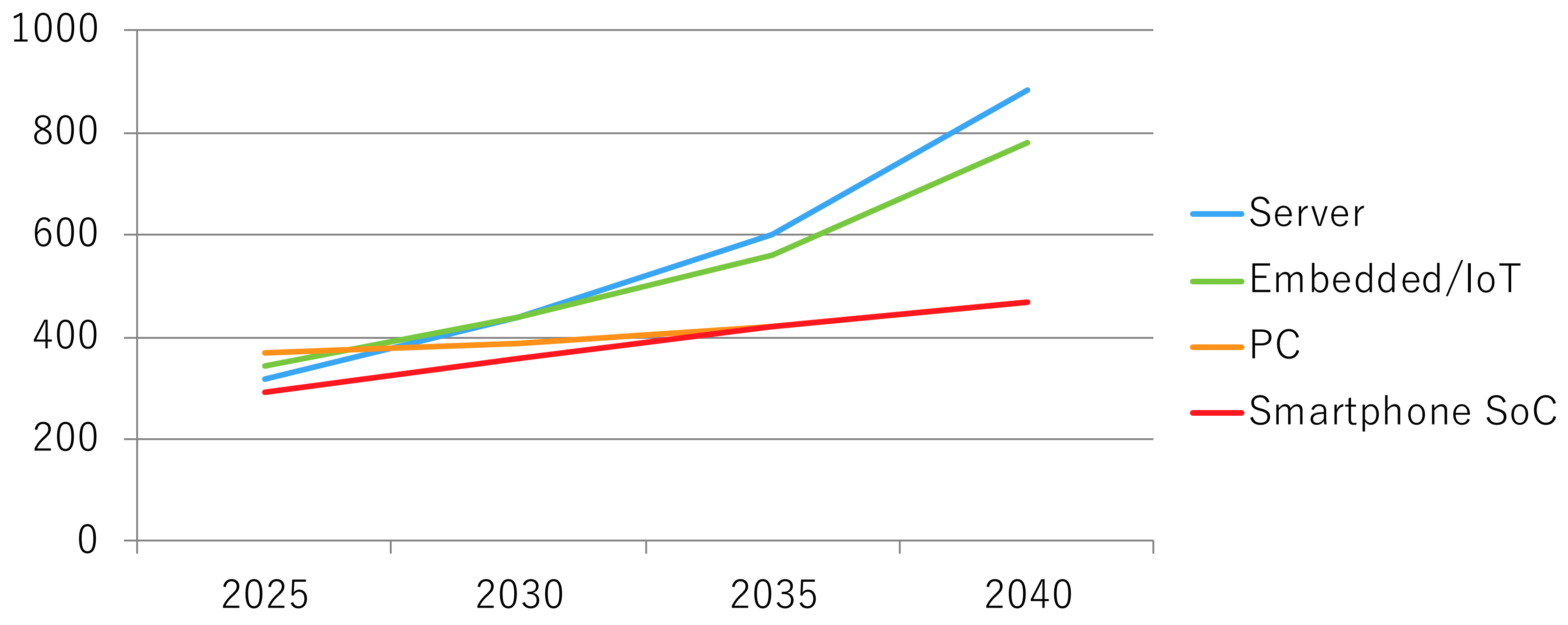
Region	2025	2030	2035	2040
North America	396	494	615	767
Europe	186	226	275	334
APAC (excluding Japan)	564	669	805	1095
Latin America	37	50	67	89
Middle East/Africa	27	37	50	69
Japan	110	144	188	246
Total	1,320	1,620	2,000	2,600



4. CPU market breakdown (worldwide)

Unit: 100 million USD

年	Server	Embedded/ IoT	PC	Smartphone SoC	Total
2025	316.8	343.2	369.6	290.4	1320
2030	437.4	437.4	388.8	356.4	1620
2035	600.0	560.0	420.0	420.0	2000
2040	884.0	780.0	468.0	468.0	2600



5. CPU market breakdown (domestic)

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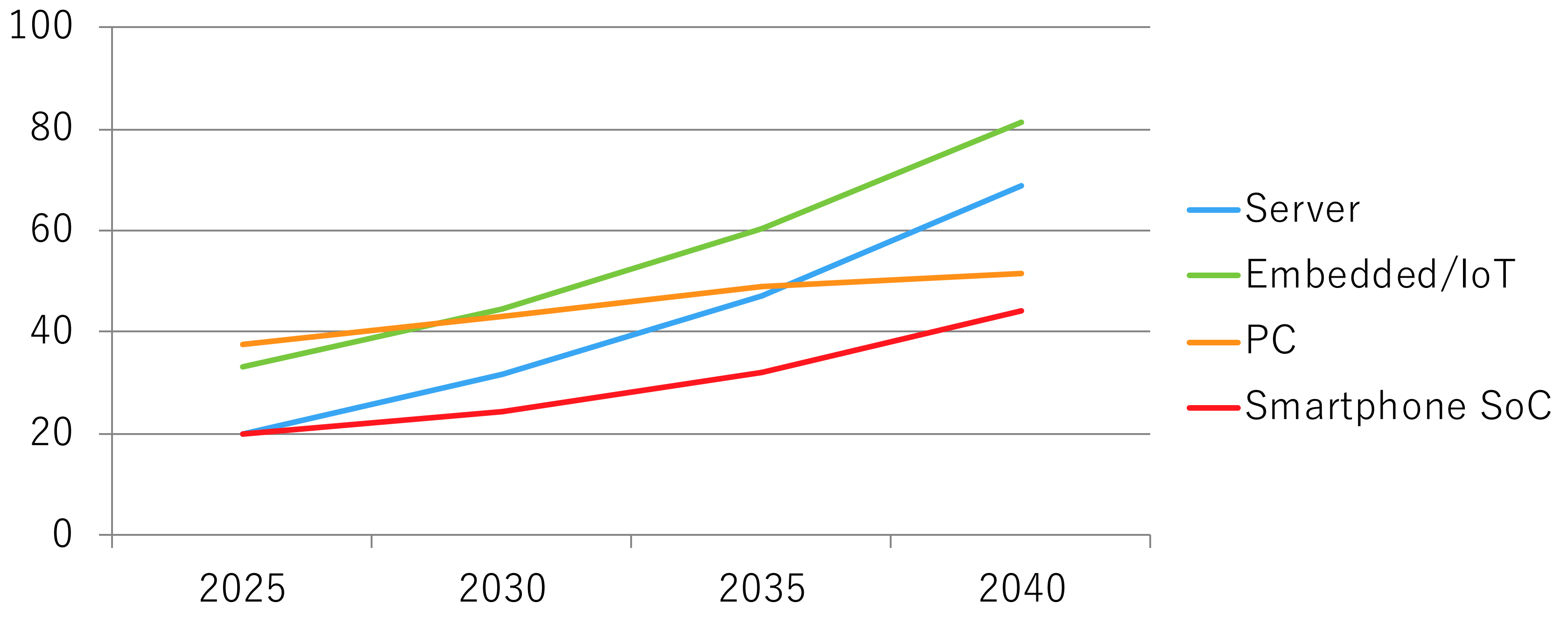
Unit: 100 million USD

Year	Server	Embedded/ IoT	PC	Smartphone SoC	Total
2025	19.8	33.0	37.4	19.8	110
2030	31.7	44.6	43.2	24.5	144
2035	47.0	60.2	48.8	32.0	188
2040	68.9	81.2	51.6	44.3	246



7. Growth and risk factors

Growth Factors

Growing demand for AI and high-performance computing (HPC)

Increasing cloud and data center investment

Advances in power-saving and high-efficiency technologies

Expanding equipment investment in Asia-Pacific (excluding Japan)

Technological innovation by competitors (Intel, AMD, ARM, etc.)

Risk Factors

Geopolitical factors, trade restrictions, and currency fluctuations

Alternatives to dedicated AI accelerators, etc.

Rising manufacturing costs and supply constraints

8. Summary

The global CPU market is expanding
at an average annual rate of 4-6%, led by Asia.

◆ Japan is a mature market,
but **stable growth of around 5%** is expected.

◆ The increasing proportion of
AI and HPC applications is key to the future.

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