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THE MERCHANT EMBEDDED COMPUTING MARKET 2011 EDITION

**A Strategic Report on the Latest
Embedded Computing Technologies
Plus Forecasts of Key Markets**

Report Highlights

- **Technical Trends**
 - ◆ PCI Slot
 - ◆ AdvancedTCA
 - ◆ AdvancedMC
 - ◆ COM
 - ◆ VMEbus
 - ◆ PC/104
 - ◆ CompactPCI
 - ◆ CompactTCA
 - ◆ MicroTCA
 - ◆ SFF
 - ◆ PMC
 - ◆ Intel & VIA Motherboards
- **Industry Structure**
 - ◆ Total Available Market
 - ◆ Competitive Strategies
 - ◆ Corporate Relations
- **Industry Analysis and Forecast, 2002-2015**
 - ◆ Market Applications
 - ◆ Architectures
 - ◆ Board Functions
 - ◆ Design Technologies
- **Company Profiles**

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The Merchant Embedded Computing Market - 2011 Edition

Synopsis

The Merchant Embedded Computing Market - 2011 Edition report analyzes the performance of the industry from 2002 - 2015. Although there are several hundred companies, most are fairly small in revenue and highly specialized, focusing on specific application segments with unique product requirements. The report tracks and analyzes five application markets, nine bus architectures and four form factors. Specific trends and issues of the forecast by application, bus architecture and form function are covered in detail in the report.

Whereas the overall MEC market is slowly recovering from the trauma of 2009's economic meltdown, the performance of various market segments, bus architectures, and companies will recover at different rates. Total revenue was just under \$5 billion in 2010, a 4 percent increase from 2009 revenue which had a 12-14 percent decrease over 2008. If the worldwide economies stabilize, the MEC industry will likely recover at about 6 percent in 2011 to ~\$5.2 billion.

The MEC report targets five specific application markets: Communications, Industrial, Medical, Military/Aerospace and an Other category that includes transportation, security, surveillance, point-of-sale/kiosk applications, etc. The Communication wireless segment is being driven by smart phone traffic. 3G/4G services are where the money is for carriers going forward and the wireline and optical networks are gearing up for upgrades to support the ever increasing traffic. The Industrial market particularly suffered from the financial crisis but investment in capital equipment infrastructure as well as test & measurement is starting to return.

The Medical segment was hit hard by the healthcare cutbacks which made purchasing MEC-based, large equipment much more difficult. The usually healthy Military/Aerospace segment is facing a rapidly declining defense department budget in the USA that is likely to cause a restructuring not seen since the end of the cold war.

Each architecture has a different rate of adoption depending on the needs of individual application segments. Overall key trends are "Power is up and down; Green is the new color; and small is big." New 40 and 32-nm silicon for microprocessors, graphics, DSPs and high integration I/O chips pack a lot of processing power while greatly reducing power consumption. High integration silicon and serial buses enable more small form factors (SFF) than in the past and are making many older, parallel bus structures, such as PCI, look like the bus architecture equivalent of a "clunker." Bus structures continue to proliferate around the major and long established busses but the number of variances is past 100.

The MEC industry can be segmented into four form functions defined as: single-board computers (SBC), digital signal processor (DSP) boards, I/O boards and an 'All Other' category that incorporates a huge number of diverse and specific functions. In some applications I/O boards are proliferating and are customized to the wide spectrum of I/O functions that different applications use. In other applications, single-board computers are becoming the trend as they incorporate more and more functionality with advanced silicon and draw in DSP, graphics and many advanced I/O functions.

About the Author

Brad Smith is an independent Principal Analyst for New Venture Research (NVR). Mr. Smith has an extensive background in semiconductors and electronics assembly, having held senior positions in leading market research companies such as DataQuest, Gartner and RHK. He is the past founder and CEO of LuxSonar Semiconductors and Innovision Labs Semiconductors, and is a Director and Co-Founder for NexGen Microsystems. He holds a BSEE from the University of Massachusetts and has completed MBA course work from the University of Phoenix.

The Merchant Embedded Computing Market - 2011 Edition

Table of Contents

Chapter 1: Introduction

Chapter 2: Executive Summary

Chapter 3: Technical Trends

VMEbus (PMC, 2eSST, PCI-X, etc.)
PCI, Compact PCI
Advanced TCA, Compact TCA, MicroTCA
Advanced MC, PC/104
Intel and VIA Motherboards
(ATX, MicroATX, FlexATX, BTX, Mini-ITX,
Nano-ITX, Pico-ITX)
COM (ETX, COM Express, XTX, Rugged
COM, Qseven, Other COM)

Chapter 4: Industry Structure

Global Economic Factors
Total Available Market
 Communications
 Industrial
 Medical
 Military/Aerospace
 Other
Competitive Strategies
Corporate Relations
Standards
Multi-Core Effect
Proliferation

Chapter 5: Industry Analysis and History 2002-2010

Chapter 6: Industry Analysis and Forecast 2010-2015

Chapter 7: Revenue by Bus Architecture, Function and Technology

Revenue, ASP & Units by Application
 Communications Industrial
 Medical Military/Aerospace
 Transportation All Other
Revenue, ASP & Units by Bus Architecture
 PCI, Compact PCI, AdvancedTCA,
 VMEbus, PMC, AdvancedMC, MicroTCA,
 PC/104, COM, Other
Revenue, ASP & Units by Function
 SBC, DSP, I/O Boards/Modules and Other
Revenue, ASP & Units by Technology
 APUs, MPUs, DSPs, GPUs, FPGAs, OS,
 Other

Chapter 8: Company Profiles

AAEON
AcQ Inducom
Acromag
Acrosser
ADLINK
AdvancedIO Systems
Advantech
Aitech
ARBOR Technology
AudioCodes
Avalue Technology
AXIOMTEK
BittWare
Concurrent Tech
congatec AG
Connect Tech
Continuous Computing
Cornet Technology
Critical I/O
Curtiss-Wright CEC
Cyclone Microsystems
Data Device
Dialogic
Diamond Systems
Diversified Technology
DSM Computer
Dynatem
E.E.P.D.
ELTEC
Embedded Planet
Emerson
Eurotech
EVOC Intelligent Tech
Extreme Engineering
Fastwel
GE Intelligent Platforms
General Micro Systems
I-Bus
IBASE Technology
IEI Tech
Interface Concept
Interphase
ITOX
Kontron
Lanner
LiPPERT
Lyrtech
Magma
MEN Mikro
Mercury Computer
Micro/Sys
MPL
N.A.T.
Nallatech
National Instruments
NEXCOM
Octagon Systems
One Stop Systems
Pentek
Performance Tech
PFU Systems
Portwell
RadiSys
RTD Embedded Tech
SECO
SKY Computers
Sun Microsystems
Technobox
TEK Microsystems
TEWS
Themis Computer
Trenton Technology
VadaTech
VersaLogic
VIA Technologies
WinSystems
Xembedded

The Merchant Embedded Computing Market - 2011 Edition

Table of Contents (continued)

Partial List of Tables and Figures

Communications OEM Markets
Industrial OEM Markets
Medical OEM Markets
Military/Aerospace OEM Markets
Other OEM Markets
Communications Forecast by Subsegment
Communications Forecast by Bus Architecture
Communications Forecast by Board Function
Industrial Forecast by Subsegment
Industrial Forecast by Bus Architecture
Industrial Forecast by Board Function
Medical Forecast by Bus Architecture
Medical Forecast by Board Function
Military/Aerospace Forecast by Bus Architecture
Military/Aerospace Forecast by Board Function
Other Market Forecast
Application Market Summary Forecast
PCI Forecast by Application Market
PCI Forecast by Board Function
CompactPCI Forecast by Specification
CompactPCI Forecast by Application Market
CompactPCI Forecast by Board Function
AdvancedTCA Forecast by Specification
AdvancedTCA Forecast by Application Market
AdvancedTCA Forecast by Board Function
VMEbus Forecast by Specification
VMEbus Forecast by Application Market
VMEbus Forecast by Board Function

PMC Forecast by Specification
PMC Forecast by Application Market
PMC Forecast by Board Function
AdvancedMC Forecast by Specification
AdvancedMC Forecast by Application Market
AdvancedMC Forecast by Specification
MicroTCA Forecast by Specification
MicroTCA Forecast by Application Market
MicroTCA Forecast by Board Function
AdvancedMC Forecast by Specification
AdvancedMC Forecast by Application Market
AdvancedMC Forecast by Board Function
PC/104 and Motherboard Forecast by Specification
PC/104 and Motherboard Forecast by Application Market
PC/104 and Motherboard Forecast by Board Function
COM Forecast by Specification
COM Forecast by Application Market
COM Forecast by Board Function
SBC Forecast by Specification
SBC Forecast by Application Market
SBC Forecast by Bus Architecture
DSP Forecast by Specification
DSP Forecast by Application Market
DSP Forecast by Bus Architecture
I/O Forecast by Application Market
I/O Forecast by Bus Architecture
I/O Forecast by Board Function
Summary Forecast for Application Market, Bus Architecture and Board Function

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