IHS **Electronics & Media**

Embedded Tech Trends – 2014

January 20th 2014
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IHS **Electronics & Media** Overview

Electronics Application & Equipment Markets

- Aerospace and Defense
- Automotive
- Consumer
- Compute
- Digital Content and Media
- Industrial
- Lighting
- Medical
- Security and Fire
- Wired Communications
- Wireless Communications

Technology Value Chain

- Application Market Forecasting
- Business Model Analysis
- Component and Systems Pricing
- Design Activity and Influence Analysis
- Global Manufacturing and Design Analysis
- Inventory Tracking
- Market Share Analysis
- Supply /Demand Analysis

Devices & Systems

Semiconductors
- Analog and Power
- ASICs and ASSPs
- DRAM
- Flash Memory
- MEMS & Sensors
- Optoelectronics
- Processors
- Semiconductor Design/IP
- Semiconductor Manufacturing
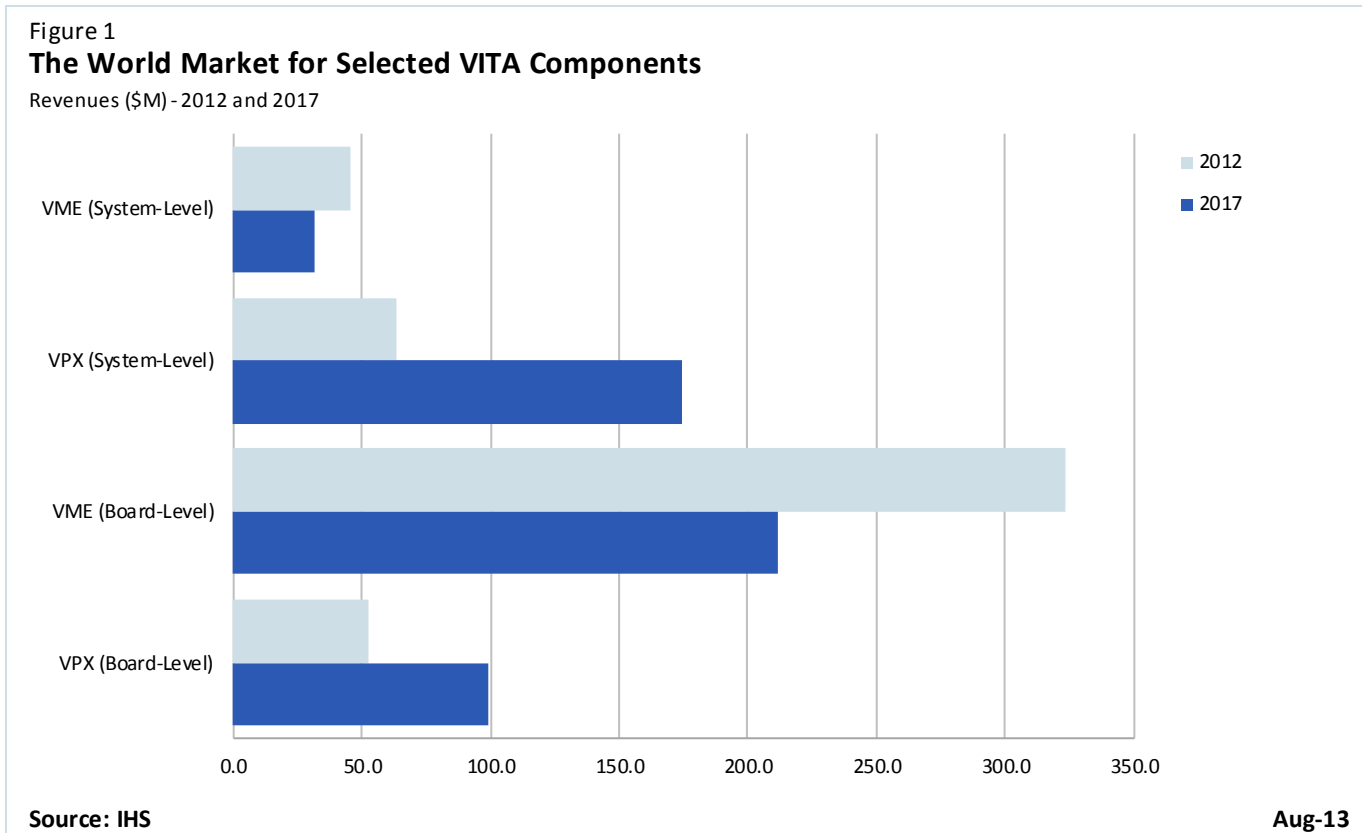- Semiconductor Market Shares

Displays
- Display Components
- Display Electronics
- Emerging Technologies
- Intellectual Property
- LCD
- LED
- OLED
- Mobile
- Touch Screens
- Television Systems

Teardowns
- Automotive Systems
- Compute Platforms
- Consumer Electronics
- Industrial Control
- Medical
- Mobile & Wireless Systems
- Set-Top Boxes
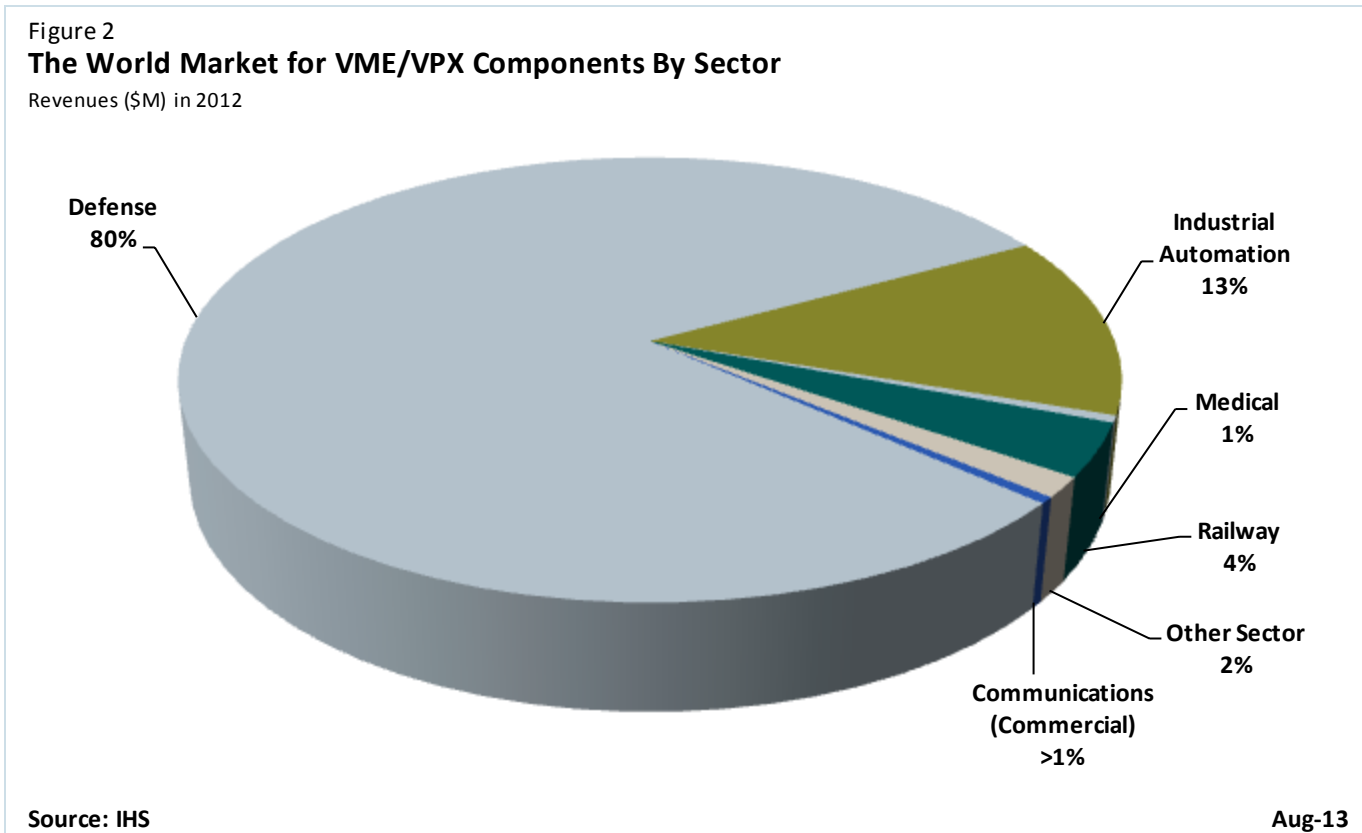- Storage Systems
- Televisions
- White Goods

Global Overview: VITA

Figure 1
The World Market for Selected VITA Components

Revenues ($M) - 2012 and 2017

Source: IHS   Aug-13

- The global market for these components was estimated to be worth 480 M USD in 2012.

Sector Perspective:

Figure 2
The World Market for VME/VPX Components By Sector
Revenues ($M) in 2012

Defense 80%

Industrial Automation 13%

Medical 1%

Railway 4%

Other Sector 2%
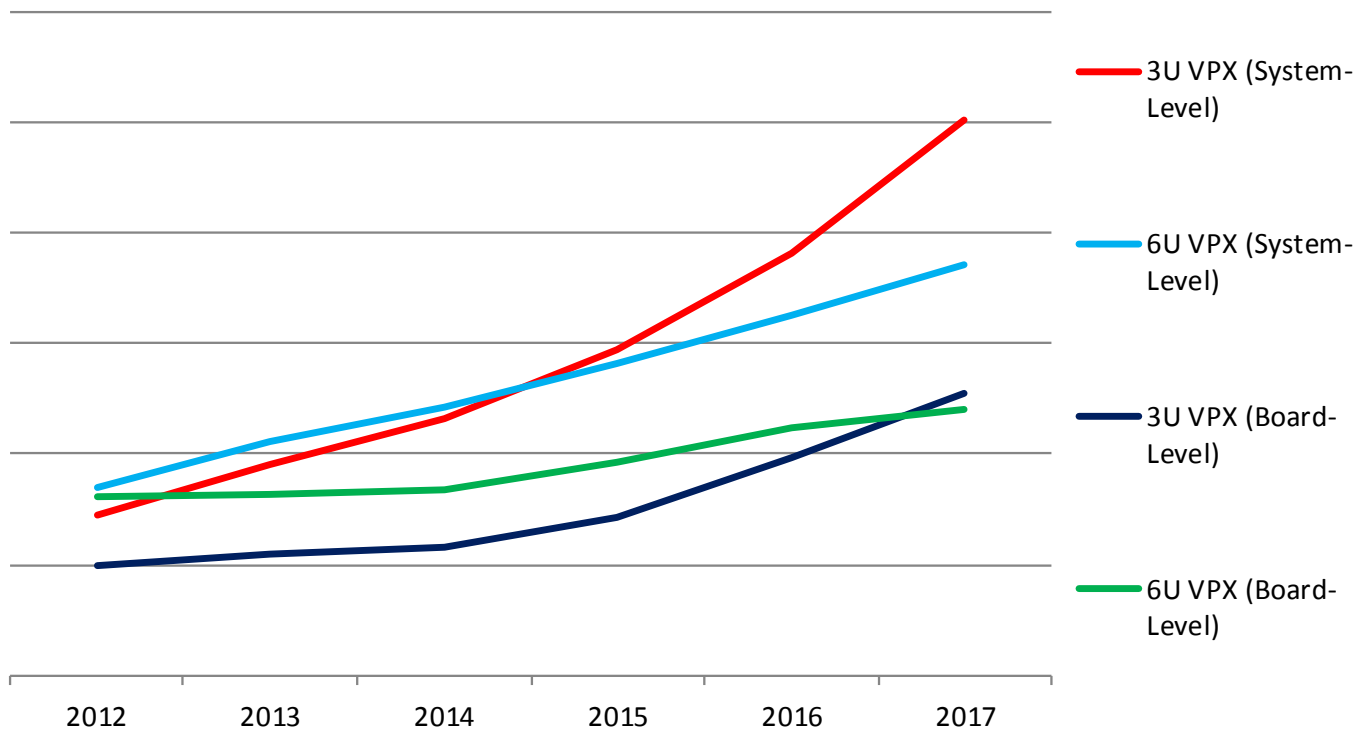
Communications (Commercial) >1%

Source: IHS

Aug-13

- No real surprise that defense customers are the largest ultimate destination for VITA components.

VPX – Size Trends

Figure 3
VPX Market by Height
Revenues ($M) - 2012 to 2017

Legend:
- 3U VPX (System-Level)
- 6U VPX (System-Level)
- 3U VPX (Board-Level)
- 6U VPX (Board-Level)

X-axis: 2012, 2013, 2014, 2015, 2016, 2017

Source: IHS   **Aug-13**

Competitive Environment

Figure 4
Market Share Analysis of VME + VPX Boards & Systems
World in 2012

Company Name	2012 Rank
GE Intelligent Platforms	1st
Curtiss-Wright Controls Defense Solutions	2nd
Mercury Systems	3rd
Kontron	4th
Emerson Network Power	5th

The market in 2012 was estimated to be worth $480 million

Source: IHS **Aug-13**

Figure 5
Market Share Analysis of VPX Boards & Systems
World in 2012

Company Name	2012 Rank
Curtiss-Wright Controls Defense Solutions	1st
GE Intelligent Platforms	2nd
Mercury Systems	3rd

The market in 2012 was estimated to be worth $115 million
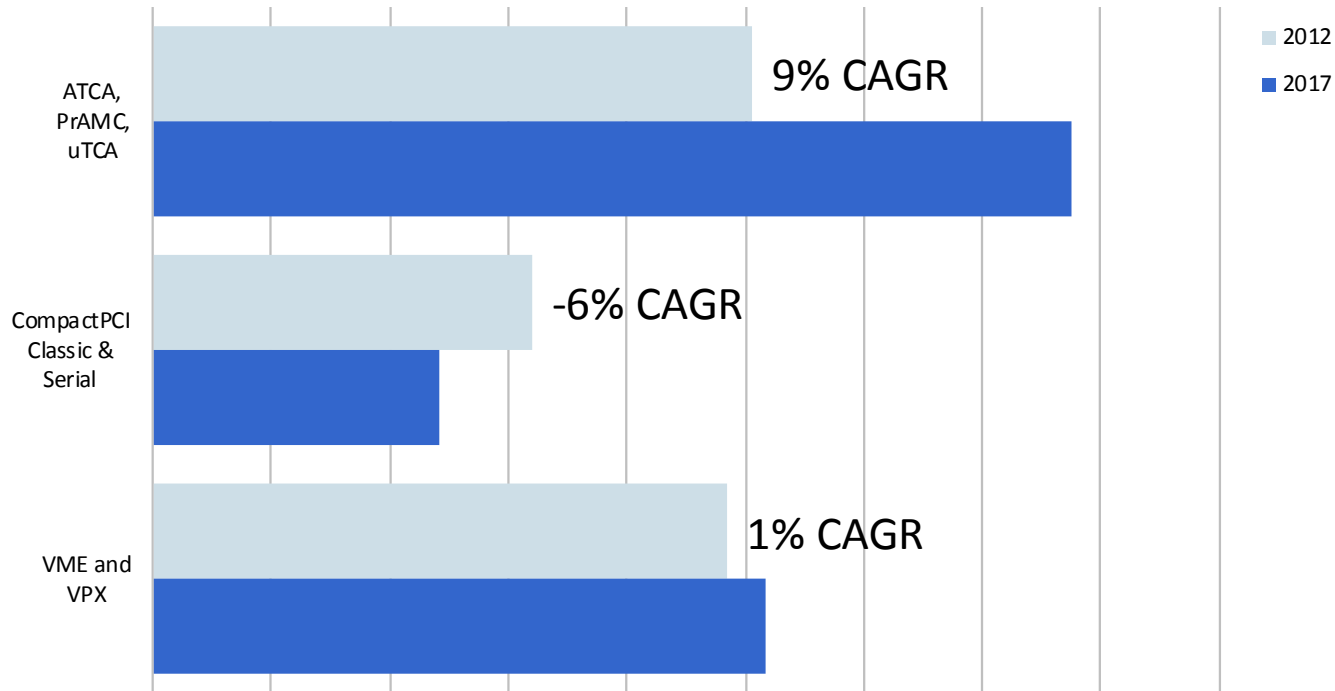
Source: IHS **Aug-13**

VITA – Comparison vs. Other Technologies

Figure 6
xTCA vs CPCI vs VITA
Revenues ($M) - 2012 and 2017

- ATCA, PrAMC, uTCA: 9% CAGR
- Compact PCI Classic & Serial: -6% CAGR
- VME and VPX: 1% CAGR

Legend: 2012, 2017

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Thank you for your attention.
Questions?
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