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THE MERCHANT EMBEDDED COMPUTING MARKET 2013 EDITION

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

Report Highlights

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 - ◆ AdvancedTCA
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The Merchant Embedded Computing Market - 2013 Edition

Synopsis

The Merchant Embedded Computing Market - 2013 Edition report analyzes the performance of the industry from 2003 - 2017. 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 board functions. Specific trends and issues of the forecast by application, bus architecture and board function are covered in detail in the report.

Whereas the overall MEC market is slowly recovering from the trauma of 2008/2009 economic meltdown, the performance of various market segments, bus architectures, and companies are recovering at different rates. Total revenue was just over \$5 billion in 2012, an increase from the previous years. With the worldwide economy stabilizing, the MEC industry recovered at about 6 percent in 2017 to ~\$6+ billion.

The MEC report targets five specific application markets: Communications, Industrial, Medical, Military/Aerospace and "All Other" categories that includes transportation, security, surveillance, point-of-sale/kiosk applications, etc. The Communication wireless segment is being driven by the exploding smart phone and tablet traffic and the four billion devices connected to the internet. 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 has returned. The automotive sector has seen renewed growth.

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 now facing a rapidly declining defense department budget in the USA. Counter to this, the military is trying to use more and more electronics for the Internet enabled soldier and robotic weapons.

Each of the nine unique architectures has a different rate of adoption depending on the needs of individual application segments. Overall key trends concern power supply and usage, green technologies and system size reduction. The new 28- and 32-nm silicon for microprocessors, graphics, DSPs and high integration I/O IV chip packs provide a lot of processing power while greatly reducing power consumption. These powerful devices are changing the landscape of the embedded board market. High integration silicon and serial buses enable more smaller form factors than in the past and are making many older, parallel bus structures, such as PCI, look obsolete. New bus structures continue to proliferate around the major and long established legacy bus architectures but the number of variances are shrinking.

The MEC industry can be segmented into four board 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

Jerry Watkins is an independent senior analyst with more than 17 years of experience in the field of market research and consulting. He has worked for leading research companies such as Frost & Sullivan, Lucid Information Services, and NSI Research both in management and as writer. Mr. Watkins has authored many syndicated reports, previously in the telecommunications sector and more recently in the computing and merchant embedded computing industry. He holds an M.A. in International Studies with a concentration in International Management.

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