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# THE WORLDWIDE MERCHANT EMBEDDED COMPUTING MARKET 2018 EDITION

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

## Report Highlights

### ■ Technical Trends

- ◆ PCI
- ◆ AdvancedTCA
- ◆ AdvancedMC
- ◆ COM Express
- ◆ VMEbus
- ◆ CompactPCI
- ◆ PC/104
- ◆ MicroTCA
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- ◆ Corporate Relations

### ■ Industry Analysis and Forecast, 2015-2022

- ◆ MEC Market
- ◆ Total Available MEC Market
- ◆ By Segment (Communications, Industrial, Medical, Aerospace/Military, Other Applications)

### ■ Company Profiles (88)

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## Synopsis

**The Worldwide Merchant Embedded Computing Market - 2018 Edition** report analyzes the performance of the standards-based and non-standards-based industry from 2015 - 2022. Although there are several hundred companies in the standards-based MEC market, most are fairly small in revenue and highly specialized, focusing on specific application segments with unique product requirements. However, the report also examines the world's leading contract manufacturers that participate in the non-standards-based product assemblies in the same market segments.

The overall MEC market is quite large and is estimated to be \$390 billion in size worldwide. But this includes the non-standards-based product assemblies in the communications, industrial, medical, aerospace/military and "Other" market categories. The standards-based MEC market is more focused and is estimated to be approximately \$10.5 billion in size worldwide. The product assemblies in this specific market involve quite complex and often low-volume designs, and the report endeavors to analyze exactly what product application groups are the most attractive and the fastest growing.

The total MEC industry is estimated to be growing at 6.9% CAGR from 2017-2022. Vertical market segments such as the Communications sector, are growing faster as the new G5 technology standards are implemented that will impact cellular infrastructure, enterprise networks, telephony enterprise and class carrier equipment. In addition, advanced medical products in the imaging, diagnostics and surgical sectors are showing great promise over the next few years.

The Industrial market segment also holds strong potential for the process control industries (oil & gas, mining, agriculture, paper/pulp and textiles) as the Industrial Internet of Things begins to impact manufacturing and engage Big Data solutions for increased productivity and output. Related industries like robotics will require high performance designs that utilize advanced artificial intelligence and virtual reality solutions. Clean energy is also examined for optimizing efficiency in solar, wind and tidal technical solutions.

The aerospace/military industries appears to be on the increase if we can trust the proposed new Trump and Chinese budgets spending. Most of this is focused on advanced weaponry, integrated flight navigation, surveillance and even emerging space and science technologies that are expected to have profound changes over the forecast period. Even commercial aviation is expected to benefit from advanced in-flight entertainment systems for long-haul international transportation.

Finally, there now exists many evolving application-specific solutions in the security/surveillance, point-of-sale/ATM/kiosk hardware that are emerging to automate our life-styles that the report classifies as "Other" MEC applications and happen to be showing great promise.

In addition to quantifying the MEC market for both standards-based and non-standards-base electronic assemblies, we list nearly 170 of the top suppliers (81 of the non-standards-based contract manufactures and 88 of the pure-play standards-based companies). Overall, this report will provide the best and most detailed snapshot available of the worldwide merchant embedded computing market.

## About the Author

**Randall Sherman** is the president and principal analyst of New Venture Research Corp., a technology market research and business consulting firm focused on the EMS and OEM electronics manufacturing industries. Mr. Sherman has more than 25 years' experience in technology and business research. He began his career as a telecom network design engineer and holds an undergraduate degree in Astrophysics. He has held senior positions at various market research firms, including Creative Strategies, Frost and Sullivan, and BIS Strategic Decisions. Mr. Sherman holds an MSEE from the University of Colorado and an MBA from the Edinburgh School of Business.

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Standards-Based Communications MEC Assembly (Cellular Infrastructure, Enterprise Network, Enterprise Telephony, Carrier Class)

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Standards-Based Industrial MEC Assembly (Process Control, Test & Measurement, Other Industrial, Clean Energy)

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Standards-Based Medical MEC Assembly (Medical Diagnostics, Therapeutic, Monitoring & Surgical)

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Standards-Based Aerospace/Military MEC Assembly (In-Flight Entertainment, Flight Navigation, Weapons, C4, Other Military, Other Transportation)

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“All Other” Standards-Based MEC Assembly (Automotive, Security/Surveillance, Point-of-Sale/Kiosk, Other Embedded)

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Abaco Systems	Cyclone Microsystems	Ioxos	RadiSys
Acromag	Data Device Corp.	iwave Systems	RTD Embedded
Acrosser	DFI, Inc.	Lanner	S&T Duetschland
ADLINK Technology	Dialogic	LCR Embedded	SECO
Advantech	Diamond Systems	Leonardo MW	Shenzhen NORCO
Aitech	Ducommun	MEN Mikro	Shiratech
Alpha Data	E.E.P.D.	Mercury Systems	SKY Computers
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ARBOR Technology	Embedded Planet	MSC Technologies	TEK Microsystems
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AudioCodes	EVOC Intelligent Tech	Nallatech	TEWS Technologies
Avalue Technology	exceet Group	NEXCOM	Themis Computer
Axiomtek	Extreme Engineering	Nutaq	Trenton Systems
b-plus GmbH	Fastwel	Octagon Systems	Trident Infosol
BittWare	Galleon Embedded	One Stop Systems	V Rose Microsystems
CommAgility	Garz & Fricke	Pactron	Vadatech
Concurrent	General Micro	PCI Systems	VersaLogic
congatec AG	Hectronic	Pentair	VIA Technologies
Connect Tech	HEITEC	Pentek	WinSystems
Cornet Technology	I-Bus	Pixus Technologies	
Critical I/O	IEI Integration		

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