

## Semiconductor Market Forecasts



### Opportunities for ARM in Embedded Processing — 2015 Edition

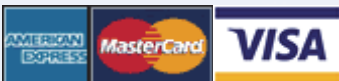
Market Analysis by Product Type & Application to 2020  
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## Opportunities for ARM in Embedded Processing - Report Overview

### Key features of the study include:

- Part of the Embedded Processing Service
- Coverage of the market for ARM-based MCUs, eMPUs, ASICs/ASSPs, FPGAs and DSPs.
- Separate analysis for 32-bit ARM and 64-bit ARM for each product type.
- Analysis of 24 application areas, providing detailed coverage of each end-use sector.
- Unit, revenue and average pricing (ASP) analysis for each product type in each application area. Base year is 2014, with forecasts to 2020.
- 2014 supplier market share estimates (in revenues) for total ARM-based embedded processors, ARM-based MCUs, ARM-based eMPUs and ARM-based ASICs/ASSPs.
- Highly quantitative analysis, with discussion summarized in short, easy to read bullet points.
- PDF and Excel delivery options available.

### Application Analysis

The study provides analysis of the market for ARM-based embedded processors in each of the following application areas:

- Automotive Under-the-Hood Electronics
- Automotive Aftermarket
- Enterprise Customer Premises Equipment
- Wireless Communications Infrastructure
- Personal, Enterprise & Cloud Storage
- Wired Games Consoles
- eBook Readers/Tablets/Netbooks
- Cameras & Camcorders
- Blu-ray/DVD Recorders & Players
- Digital Home Networks
- Automation & Drives
- Smart Cards & Payment Processing
- Automotive OE Entertainment Systems
- Cellphones & Smartphones
- Wired Communications Infrastructure
- Compute Platforms
- Office Equipment & Computer Peripherals
- Handheld Games Consoles
- Media Players/MP3 Players
- Digital TVs & Set-top Boxes
- Wearable Electronics
- Other Digital Home Appliances
- Medical Electronics
- Other Industrial Electronics

## Product Analysis

The study provides analysis of the market for ARM-based embedded processors in each of the following product types:

- 32-bit ARM-based MCUs
- 32-bit ARM-based eMPUs
- 32-bit ARM-based ASICs/ASSPs
- 32-bit ARM-based FPGAs
- 32-bit ARM-based DSPs
- 64-bit ARM-based MCUs
- 64-bit ARM-based eMPUs
- 64-bit ARM-based ASICs/ASSPs
- 64-bit ARM-based FPGAs
- 64-bit ARM-based DSPs

## Example Tables

A selection of example tables taken from the study are shown below:

**Opportunities for 64-bit ARM in Embedded Processing - Revenue Summary by Application Area**

Revenues (\$m)	2014	2015	2016	2017	2018	2019	2020	CAGR (14/20)	DIFF (14-20)	SUM (14>20)
<b>Automotive</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automotive Under-the-hood Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automotive OE Entertainment Systems	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automotive Aftermarket	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Communications</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Cellphones & Smartphones	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Enterprise Customer Premises Equipment	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wired Communications Infrastructure	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wireless Communications Infrastructure	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Computer</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Compute Platforms	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Personal, Enterprise & Cloud Storage	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Office Equipment & Computer Peripherals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Digital Home</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wired Games Consoles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Handheld Games Consoles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
eBook Readers/Tablets/Netbooks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Media Players/MP3 Players	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Cameras & Camcorders	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Digital TVs & Set-top Boxes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Blu-ray/DVD Recorders & Players	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wearable Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Digital Home Networks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Other Digital Home Appliances	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Industrial/Medical</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automation & Drives	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Medical Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Smart Cards & Payment Processing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Other Industrial Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>-</b>	<b>0.0</b>	<b>0.0</b>
<b>Year-on-year Growth</b>		<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>			

Source: Semicast Research

Table Revised: June 2015

Opportunities for ARM in Embedded Processing — 2015 Edition  
 Global Market Analysis by Product Type & Application to 2020 | June 2015

Opportunities for ARM in Embedded Processing

Product Type	2014	2015	2016	2017	2018	2019	2020	CAGR (14/20)	DIFF (14-20)	SUM (14>20)
<b>32-bit ARM-based MCU</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>64-bit ARM-based MCU</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>32-bit ARM-based eMPU</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>64-bit ARM-based eMPU</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>32-bit ARM-based ASIC/ASSP</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>64-bit ARM-based ASIC/ASSP</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>32-bit ARM-based FPGA</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>64-bit ARM-based FPGA</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>32-bit ARM-based DSP</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>64-bit ARM-based DSP</b>										
Revenues (\$m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Units (MU)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Average Price (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-		
<b>Total Revenues (\$m)</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>-</b>	<b>0.0</b>	<b>0.0</b>
<b>Year-on-year Growth</b>		<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>			
<b>Total Units (MU)</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>-</b>	<b>0.0</b>	<b>0.0</b>
<b>Market ASP (\$)</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>-</b>		

Source: Semicast Research

Table Revised: June 2015

# Opportunities for ARM in Embedded Processing — 2015 Edition

## Global Market Analysis by Product Type & Application to 2020 | June 2015

### Opportunities for 64-bit ARM-based eMPUs in Embedded Processing - Revenue Summary by Application

Revenues (\$m)	2014	2015	2016	2017	2018	2019	2020	CAGR (14/20)	DIFF (14-20)	SUM (14>20)
<b>Automotive</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automotive Under-the-hood Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automotive OE Entertainment Systems	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automotive Aftermarket	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Communications</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Cellphones & Smartphones	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Enterprise Customer Premises Equipment	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wired Communications Infrastructure	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wireless Communications Infrastructure	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Computer</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Compute Platforms	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Personal, Enterprise & Cloud Storage	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Office Equipment & Computer Peripherals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Digital Home</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wired Games Consoles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Handheld Games Consoles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
eBook Readers/Tablets/Netbooks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Media Players/MP3 Players	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Cameras & Camcorders	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Digital TVs & Set-top Boxes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Blu-ray/DVD Recorders & Players	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Wearable Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Digital Home Networks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Other Digital Home Appliances	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Industrial/Medical</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Automation & Drives	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Medical Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Smart Cards & Payment Processing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Other Industrial Electronics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Total</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Year-on-year Growth</b>		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			

Source: Semicast Research

Table Revised: June 2015

### Worldwide Market Share Estimates for Leading Suppliers of ARM-based Embedded Microprocessors in 2014

Supplier	Market Share
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
Others	100.0%
<b>2014 Market Size: \$ million</b>	<b>100.0%</b>

Source: Semicast Research

Table Revised: June 2015

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Colin joined Semicast Research in 2006 and is principal analyst for semiconductor research and vice president of business development. Prior to joining Semicast, he worked for 12 years at IMS Research, rising to the position of Senior Research Director of its Semiconductor Research Group and responsible for analyst coverage on the analog/mixed signal, optoelectronic and embedded processing industries. Colin also set-up and established IMS Research's Automotive Electronics Group. During his tenure, Colin authored dozens of reports and became a well respected industry analyst. He holds a B.S. in Electronic Engineering from Aston University, England.

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