

Embedded Tech Trends

2013: Embedded Technologies in Action

“The Business and Technology Forum for Critical Embedded Systems”

Analyst Viewpoints

Jerry Gipper, VITA



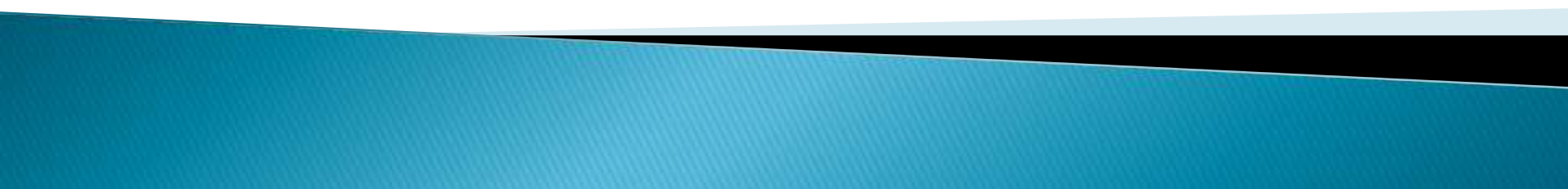
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IMS Research

2012 Update



IMS Research: Supplier Ranking

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Market Rank Estimates for Suppliers of VITA Technologies

In Revenue

| Company Name | 2008 | 2009 | 2010 | 2011 |
|--|------|------|------|------|
| GE Intelligent Platforms | 1st | 1st | 1st | 1st |
| Mercury Computer Systems | 5th | 3rd | 4th | 2nd |
| Emerson Network Power | 3rd | 5th | 2nd | 3rd |
| Curtiss-Wright Control Embedded Computing | 2nd | 2nd | 2nd | 4th |
| Kontron | 4th | 4th | 5th | 5th |

[Other Suppliers in the top 9 for 2011 include (in no order): Aitech, Concurrent Technologies, Extreme Engineering and Eurotech]

| | | | | |
|-----------------|--------|--------|--------|--------|
| Market Estimate | \$496M | \$456M | \$430M | \$450M |
|-----------------|--------|--------|--------|--------|

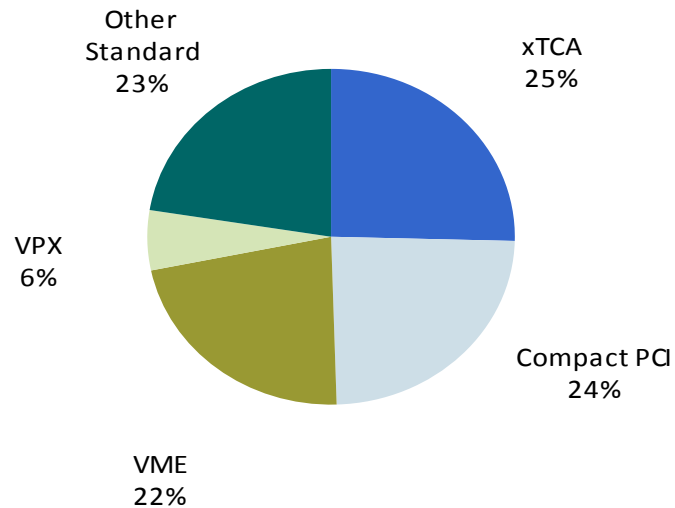
Source: IMS Research, May 2012

The World Market for Single Board Computers by Form Factor

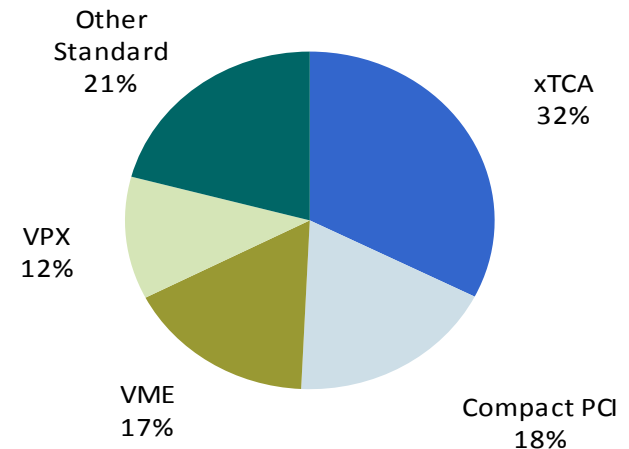
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Comparitive Market Size - 2012 vs 2016

2012 Total = 1.6 Bn USD



2016 Total = 2.0 Bn USD



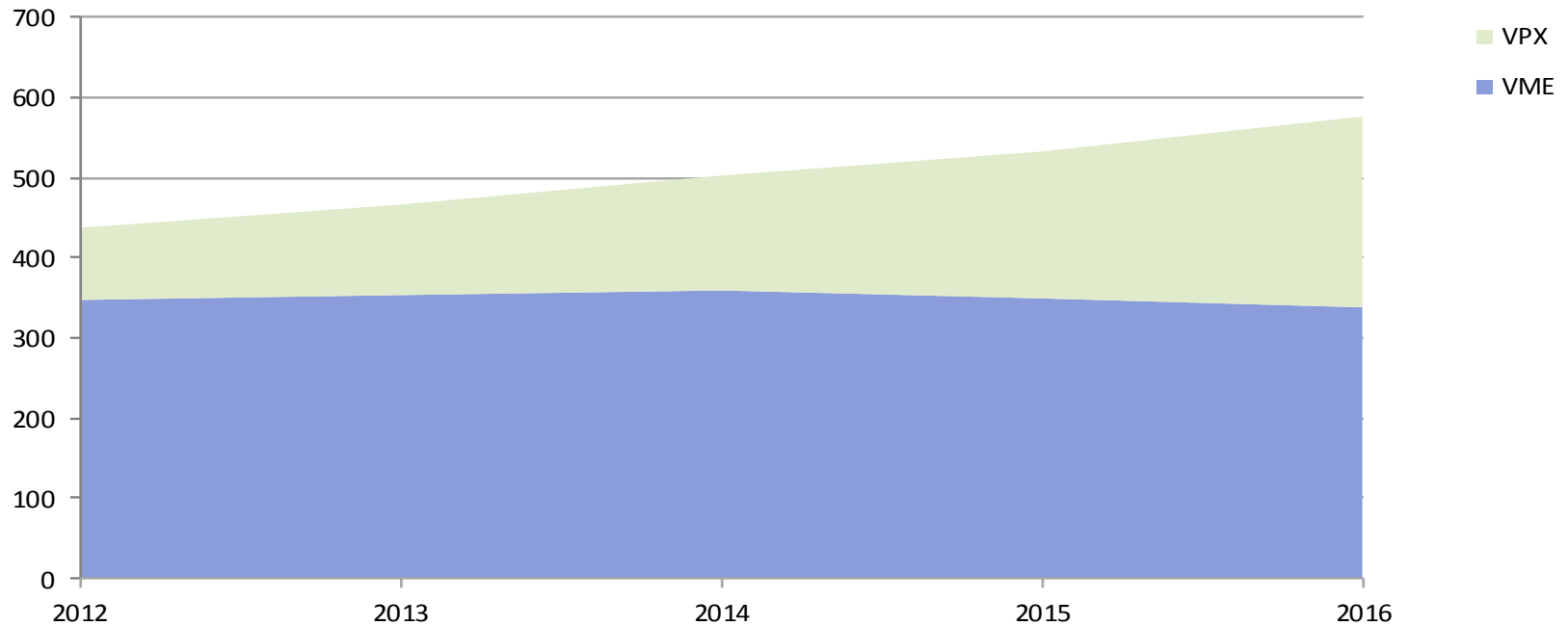
Source: IMS Research

May-12

VME and VPX Changing Product Mix

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Revenue Share (\$)



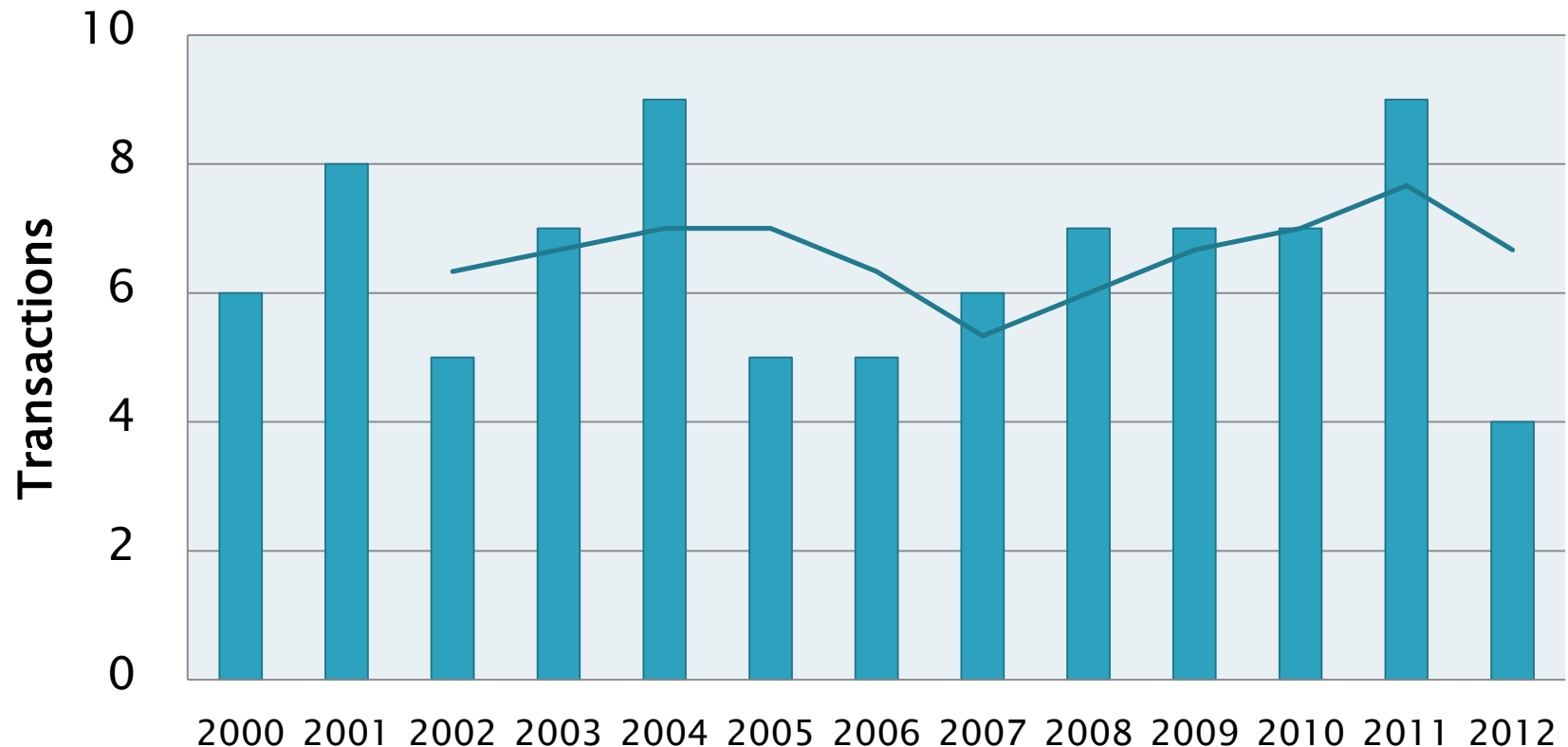
Source: IMS Research

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Mergers and Acquisitions

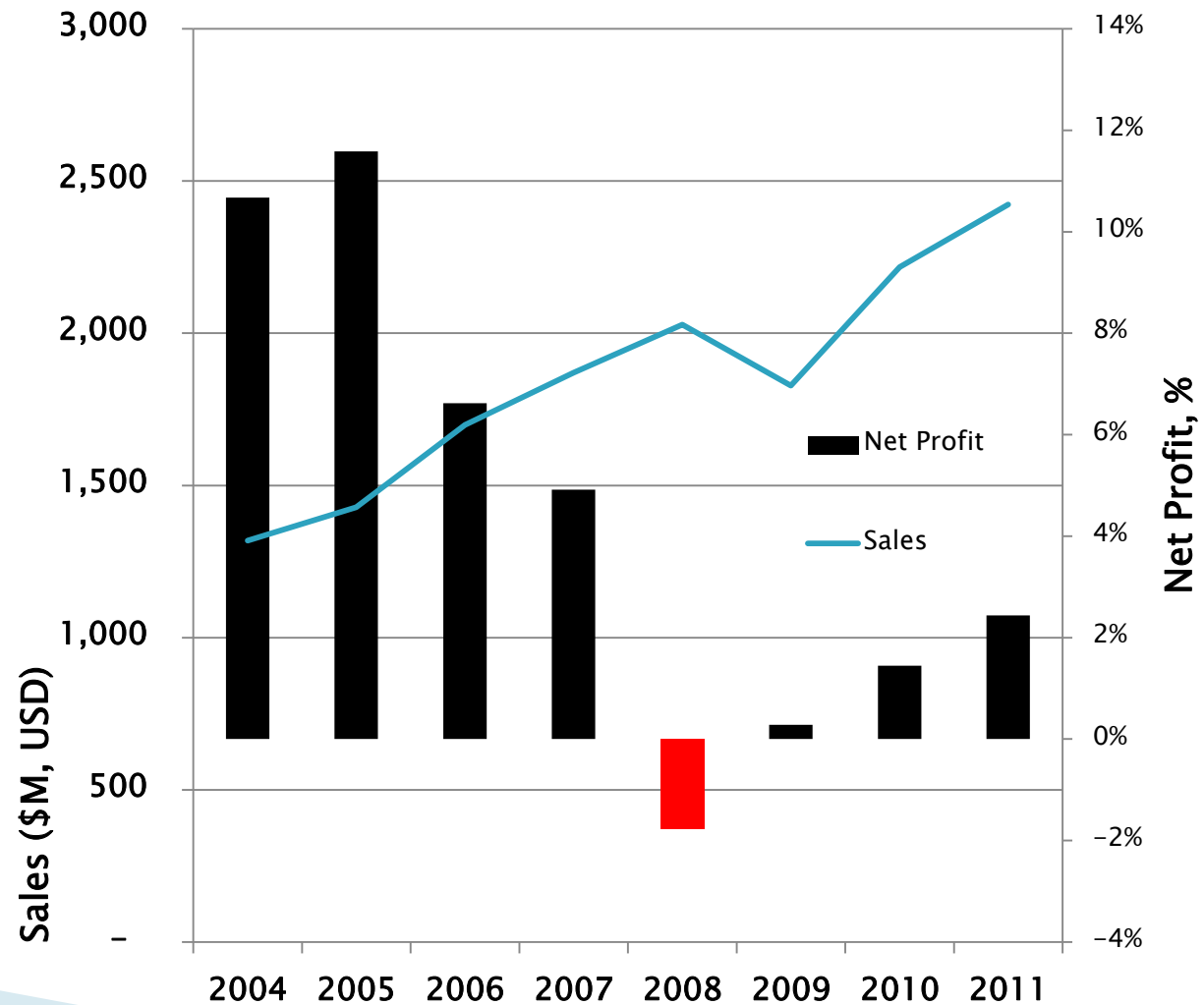
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Mergers & Acquisitions



Market Basket

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Intelligent Systems



Embedded World and Mobile Compute World Collide

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Mobile Computer World

Embedded World

Mobility
Flexibility
Rapid Innovation

Stability
Longevity
Quality/Reliability

Result of Collision

Creation of Intelligent Systems Segment

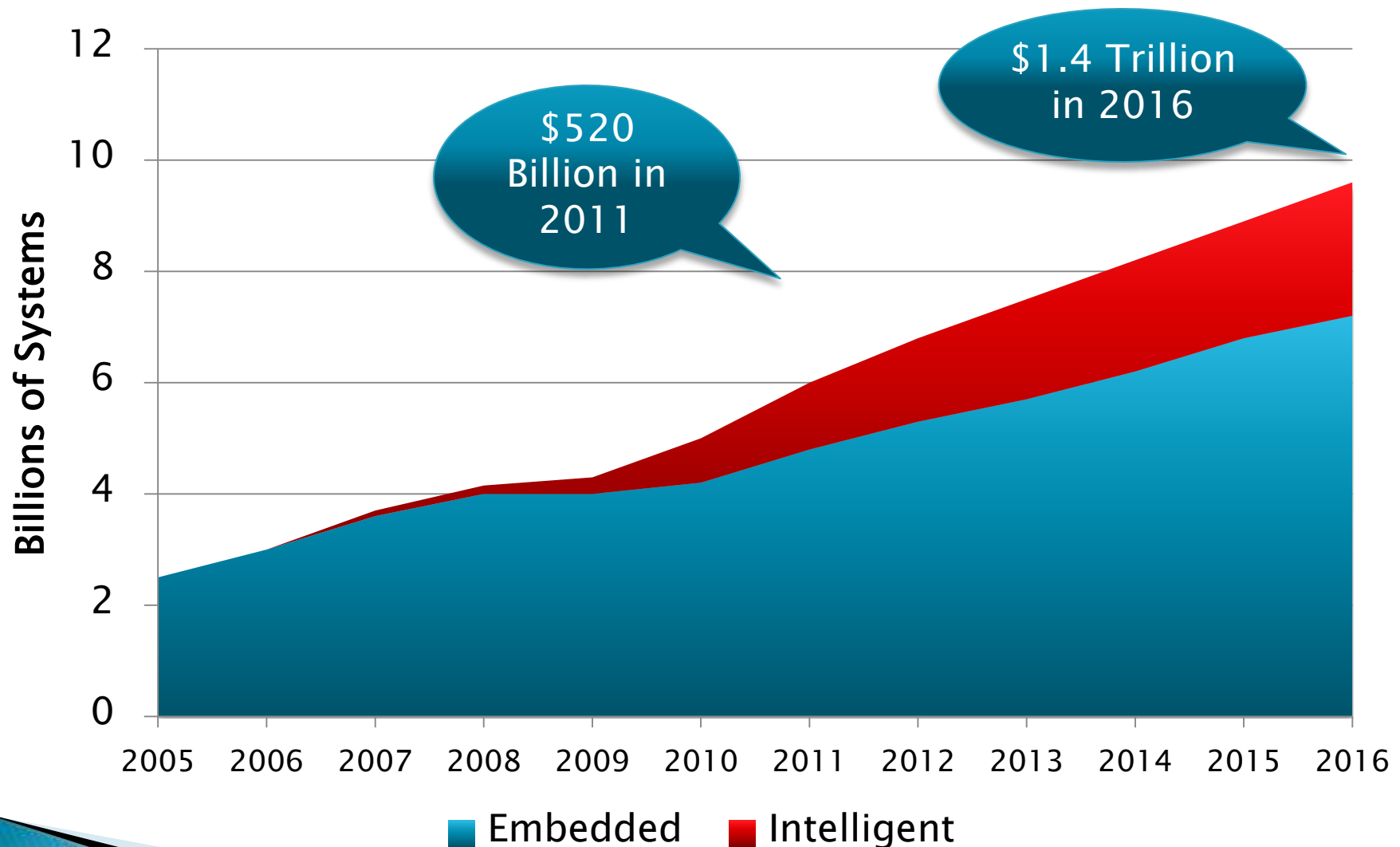
- ▶ Multi-core/Advanced Processors
- ▶ Always on/intelligent connectivity
- ▶ High-level OS and User-Machine Interface
- ▶ Data Generation and analysis

Intelligent Systems are:

- ▶ Connected
- ▶ Secure
- ▶ Managed
- ▶ Intelligent

Systems Revenue and Shipments, 2005–2016

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Agenda

Intelligent systems do not include PCs or mobile phones

Source: IDC 2011

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Thank you

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