ARM Forecast to Significantly Increase Lead over MIPS, Power Architecture and x86 In Digital Home Battle

London, England; Preliminary findings from Semicast's forthcoming report "Opportunities for Embedded Processors in the Digital Home" show ARM increased its position as the leading architecture for embedded processors in digital home applications in 2010, ahead of MIPS, Power Architecture and x86. The report suggests that ARM's lead over the competition in the digital home is set to increase significantly in the medium term.

Semicast judges ARM to have been the leading embedded processing architecture in the digital home for several years, although its research shows ARM and MIPS engaged in a ferocious battle in individual applications such as home networking gear, media players/MP3 players, digital cameras, digital TVs, set-top boxes and DVD recorders. ARM has for now conquered the handheld games market with the two next generation platforms (Nintendo 3DS and Sony Vita) both using ARM. In comparison, Power Architecture has achieved a dominant position in wired games consoles, with design-wins for the Sony PlayStation 3, Nintendo Wii (and forthcoming Wii U) and Microsoft Xbox 360. However Semicast forecasts Power Architecture will see limited revenue growth in other areas of the digital home, and its current dominance of games consoles is expected to be challenged by ARM in the next generation Xbox. Semicast therefore sees revenues for Power Architecture in the digital home stalling in the medium term, following a short term boost from production of the next generation of games consoles.

Historically, x86 has not had a significant presence in the digital home, with its mix of price, performance and power consumption not best suited to consumer applications. However the emergence of media tablets and netbooks as a high growth category offers an ideal platform for the x86 architecture to establish a presence in the digital home, while strong growth is also forecast for x86 in digital TVs and set-top boxes. On current projections, Semicast is forecasting revenues for x86 in the digital home to pass those for Power Architecture around 2016.

Colin Barnden, Principal Analyst at Semicast Research commented "ARM's future success in the digital home is forecast across most equipment types, but one of the leading areas for growth is set to be ebook readers, media tablets and netbooks. Here, ARM has achieved a significant early lead against its main architectural rivals, with design-wins in products such as the Amazon Kindle, Apple iPad/iPad2, Barnes & Noble Nook, BlackBerry Playbook, Motorola Xoom and Sony S1/S2".

In many of these products, ARM's leadership position comes from multiple design-wins across the spectrum of its silicon partners, for example in the applications processor (Freescale, Nvidia, Samsung, Texas Instruments), baseband processor (Mediatek, Qualcomm, ST-Ericsson), Bluetooth/Wi-Fi communications controller

(Broadcom, Marvell) and simple M0/M3 MCU (Fujitsu, NXP, STMicroelectronics).

Broadcom and Samsung were the two leading suppliers of embedded processors to digital home applications in 2010, with IBM, Renesas Electronics and Texas Instruments completing the top five. Collectively, the top five suppliers accounted for almost half of the market between them.

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