

Smartphones, Tablets, and Notebook PCs to Grow at 25.7% CAGR Through 2015

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While the consumer electronic (CE) market was once driven by the ability of devices to provide specific functions, like music playback, video, or voice communications, CE devices are increasingly providing multiple functions and Internet connectivity for information, communications, and entertainment. This is resulting in the overlap of features and functions between product categories not only in the mobile segment, but also in other CE devices like digital TVs and set top boxes. As a result, this entire category is morphing into a larger category often referred to as smart devices. These devices are increasingly sharing the same silicon components, operating systems, and application software. There are three leading platforms in the mobile segment—smartphones, tablets, and notebooks PCs—and new In-Stat (www.in-stat.com) research forecasts that this category of mobile “magnet platforms” will grow at a CAGR of 25.7% through 2015 as compared to 8.7% for the overall mobile market.

“The technology driver of all these smart devices is the mobile technology, because it represents the largest and fastest growing segment of the entire electronics market,” says Jim McGregor, Chief Technology Strategist. “Even in PCs, where increasing performance was once the mantra, CPU vendors are now focused on the performance efficiency of mobile computing and using the resulting products to drive advancements in other forms of computing including desktop PCs, servers, and embedded applications. The innovation of the mobile market is being driven by four key factors: richer content, network access for communications and content, increased bandwidth to enable this access, and new technologies. These four factors form a self-sustaining circle of innovation that feeds from and enables each factor.”

Key research findings include:

- Only 40% of the mobile SoC TAM will use at least one dedicated GPU in 2011. It is important to note that both the number of SoCs using GPUs and the number of GPU cores per SoC is increasing throughout the forecast period.
- The mobile SoC TAM will exceed 3.1 billion devices in 2015.
- Intel and Imagination lead the GPU market because of their dominance in

PCs and smartphones, respectively. Combined, the two are projected to comprise 61.3% of the GPU technology mobile serviceable available market in 2011.

- Smartphones will increase from just under 20% of total handsets in 2010 to 43% in 2015.

[Mobile Graphics: Smartphones Beat the Drum to Which All Markets March \[1\]](#) (#IN1105075SI), provides a comprehensive look at the graphics, or GPUs, with a strong emphasis on the integrated or intellectual property (IP) solutions that are available for mobile consumer electronic (CE) devices.

The forecasts in this report include:

- Five-year mobile graphics TAM by mobile device platform
- CE device forecasts for cellphones, smartphones, notebook PCs, tablets, digital cameras, MP3 players, personal navigation devices, e-readers, handheld game consoles, digital camcorders, portable media players, and mini-note PCs (netbooks).
- Market shares for 2010 and estimated for 2011 for vendor and GPU technology: smartphones, notebook PCs, tablets, e-readers, handheld game consoles, portable media players, and mini-note PCs (netbooks).
- Vendor profiles including AMD, ARM, Digital Media Professionals (DMP), Imagination Technologies, Intel, NVIDIA, Qualcomm, and Vivante.

This research is part of In-Stat's Mobile Technology service, which provides analysis of the market for technologies, IP, and semiconductors that enable next-generation mobile devices, including processors, graphics, modems, GPS, displays, memory, storage, operating systems, software, and human interfaces.

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More Information on this Research

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- **Service:** [Mobile Technology](#) [6]
- **Product Number:** IN1105075SI
- **Publication Date:** December 2011
- **Number of Pages:** 65

- **Price:** \$4,995 USD
- [Abstract, Table of Contents, Figures & Tables](#) [7]
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