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In-Stat

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The term “mobile processor” refers to a range of processors used in mobile CE devices, often referred to as applications processors and central processing units (CPUs). These highly flexible mobile processors are used in multifunction devices that combine computing, communications, entertainment, and/or productivity capabilities. Mobile devices include e-readers, handheld game consoles (HGCs), mobile PCs, portable media players (PMPs), smartphones, and tablets. New NPD In-Stat (www.in-stat.com [1]) research, reports that the growth of mobile processors in 2011 exceeded 43% and is forecast to grow at a 22% CAGR through 2016.

“Although the total available market for mobile processors continues to grow, the emergence of industry leaders in the high-growth mobile device segment is becoming a key factor in the success of processor vendors,” says Jim McGregor, Chief Technology Strategist. “Just having a captive smartphone and tablet market has propelled Apple into second place for the entire mobile processor market just behind industry leader Intel. In 2012, Apple will likely capture the top spot, in terms of unit shipments, driven by the success of its iPhone and iPad. Other companies that benefitted greatly from new product releases or dominance by their OEM customers included Nvidia, Texas Instruments, Qualcomm, and Samsung.”

Key research findings include:

- For all mobile devices, ARM is the dominant processor architecture with over 73% of all units shipped and is growing.
- Intel's dominance continues in mobile PCs, while Apple, Qualcomm, and Samsung claim the top spots in other CE devices.
- Smartphones and tablets represent the greatest opportunity for growth with a combined 75% growth in 2011 and 29.3% CAGR expected through 2016.
- In-Stat anticipates consolidation in the mobile processor market beginning in the 2013/2014 timeframe.
- The release of Windows 8 later this year will be a pivotal point in the competition between the ARM and x86 processor architectures.

This market Alert is drawn from the In-Stat research, Mobile Processor Architectures, Devices, and Market Shares, Q4'11 ***[2]*** (#IN1204993SI), which examines the vendors, markets, and issues surrounding the mobile processor market. As the first in a quarterly series of reports on mobile processors and mobile graphics, the mobile processor report provides in-depth analysis on key issues in the market as well as unit forecasts:

Quarterly shipment forecast by mobile processor vendor

- Quarterly shipment forecast by application: mobile PCs, PMPs, HGCs, e-readers, tablets, smartphones
- Quarterly shipment forecast by processor architecture, including ARM, MIPS, and x86
- Analysis of key issues potentially impacting the market, including the battle between ARM and x86, the pending release of Windows 8, the make vs. buy decision, differentiation and integration, the growth of the low-cost segments, industry consolidation, technology adoption and migration, manufacturing, and legal issues
- Five-year outlook for the market
- Processor and vendor profiles for Amlogic, Anyka, AMD, Apple, Broadcom, Freescale Semiconductor, HiSilicon, Ingenic Semiconductor, Intel, Marvell Technology Group, MediaTek, NuFront, Nvidia, Qualcomm, Renesas Mobile, Rockchip, Samsung, Shanghai Jade Tech, Spreadtrum, ST-Ericsson, Texas Instruments, VIA Technologies, Vimicro, and ZiiLABS

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.

Related In-Stat research:

Mobile Graphics: Smartphones Beat the Drum to Which All Markets March [3]

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Smart Mobile Devices, Q1'12 Forecast [6]

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Smart Mobile Devices: Hardware Determines Usage for Smartphones, PMPs, Tablets, and Laptops [8]

Tablet Quarterly [9]

Quarterly Mobile PC Shipment and Forecast Report [10]

More Information on this Research

- **Title:** Mobile Processor Architectures, Devices, and Market Shares, Q4'11
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