

Compute Platforms Topical Report

# Thin and Light – The Rise of Consumer Ultra-Low Voltage Microprocessors?

By Matthew Wilkins, Principal Analyst and Peter Lin, Senior Analyst

**Forecast**

**Frequency, Time Period**

- 5-year annual

**Measures**

- Units
- Penetration
- Market Share (Shipments)
- Semiconductor Content Value (\$)

**Regions, Markets**

- Worldwide

**Applications/Products Covered**

- Notebook PCs
- Netbooks
- CULV Notebooks
- Desktop PCs

**Technologies Covered**

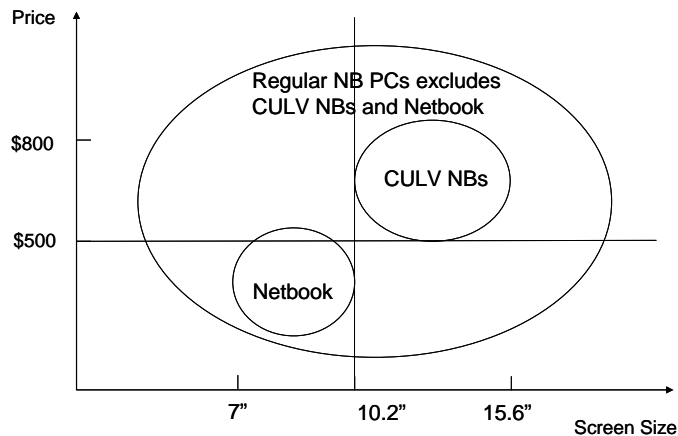
- Microprocessors
- Multi-Core Microprocessors
- Integrated Graphics Processors
- Microprocessors with integrated graphics
- Discrete Graphics
- Chipsets
- Batteries

In its analysis of the Notebook PC market, encompassing both the “hot” areas of netbooks and CULV notebook PCs, iSuppli has found that despite the worldwide recession, there remains strong enthusiasm for notebook PCs, resulting in our unit shipment growth forecast of 16%.

Netbooks will also report a high Compound Annual Growth Rate (CAGR) of 27% across the 2008-2013 time period, spurred not only by the low price of the product but also by greater competitiveness of the netbook market given the growing number of PC OEMs launching products and offering new bundles with telecom operators.

In this report iSuppli focuses on the microprocessor, one of the most important aspects of the compute platform and a key area for leading-edge semiconductor designs, technologies, and manufacturing processes. In particular, the report examines the consumer ultra-low voltage (CULV) microprocessor while analyzing the latest as well as forthcoming technology trends in microprocessor design. The report will also consider the manufacturing technology that is so crucial to the continued development of the microprocessor. All forecasts span the time frame of 2008-2013.

**Notebook PC Segmentation**



**Critical Questions Answered**

- What microprocessors are being used in Netbooks and CULV Notebooks?
- Who are the leading microprocessor suppliers in the PC and Netbook segments?
- What are the latest and forthcoming trends in PC microprocessor design?

**Who Should Read This?**

- EMS / ODMs / OEMs / ISVs
  - Planning Managers
  - Procurement Managers
  - Engineering Managers
  - Strategic & Tactical Marketing Managers
- OEMs / EMS / ODMs / Component Suppliers
  - Marketing Managers
  - Strategic Marketing
  - Strategic Planning
- Financial Community
  - Financial Analysts

## Lead Analyst

### Matthew Wilkins, Principal Analyst

Matt is a principal analyst for iSuppli covering compute platforms in the application markets practice. In addition to managing iSuppli's compute platforms research, Matt manages iSuppli's Computer Systems Cost Analyzer (CSCA) - a cost modeling tool for the PC platform. Prior to iSuppli, Matt was a research analyst at Gartner in the product research division, where he covered the compute platform application markets. Most recently he managed tactical research focusing on the desktop and notebook PC markets, and was one of the lead analysts covering the technical workstation market. Prior to Gartner, Matt was responsible for custom research projects at the IT market research division of McGraw-Hill.

Matt holds a BSc Degree in Design Technology and Business, from the University of Plymouth, Devon, England.

### Peter Lin, Senior Analyst

Peter is a senior analyst for iSuppli covering compute platforms in the application markets practice. Prior to iSuppli, Peter served as a procurement manager at Lenovo where he was responsible for sourcing DRAM and electronics products and benchmarking key component prices. Peter also served as an industry analyst at Taiwan's Market Intelligence Center (MIC) where he was responsible for research on enterprise storage, server, desktop PC, e-business and IPO procurement.

Peter earned a Bachelor of Business Administration from National Taiwan University and an MBA from National Chengchi University.

## Table of Contents

- Introduction
- Executive Summary
- Findings and Implications
- Notebook PC Segmentation –An iSuppli Definition
- Thin and Light Notebook Market Overview
  - Thin and Light Notebook Forecast: Netbook and CULV Notebook
  - Netbook and CULV Notebook Penetration Forecast
- Platform Focus - Consumer Ultra-Low-Voltage Processors
  - Intel
  - AMD
  - VIA
- Key Issues and Product Analysis
  - Cannibalization in the Notebook PC segment
  - Battery Life
  - Performance
  - Pricing
- Microprocessor Technology Trends
  - Multi-Core Penetration
  - Integration of Graphics Functionality into PC Microprocessors
  - PC Shipments and the Microprocessor Market
- Manufacturing Process Update
  - Intel
  - AMD
- Conclusions
- Appendix A: Assumptions
- Appendix B: Definitions (Products, Applications, Regions)
- Appendix C: Research Methodology

## Figures

- Notebook PC Segmentation
- Notebook PC Shipment Penetration Forecast by Segment, 2008–2013
- Notebook PC Positioning
- Desktop PC Multicore Processor Penetration Forecast
- Notebook PC Multicore Processor Penetration Forecast
- Desktop PC Penetration Forecast for Microprocessors with Integrated Graphics
- Notebook PC Penetration Forecast of Processors with Integrated Graphics
- PC Shipment to MPU Revenue Correlation Architectures of Penryn and Westmere

## Tables

- Netbook Shipment Forecast, 2008–2013
- CULV Notebook Shipment Forecast, 2008–2013
- Notebook PC Shipment Penetration Forecast by Segment, 2008–2013
- Intel First-generation CULV Processors Features of Intel First-generation CULV Microprocessors
- Intel Second-generation CULV Processors Features of Intel Second-generation CULV Microprocessors
- Intel Third-generation CULV Processors Features of Intel Third-generation CULV Microprocessors
- AMD First Generation CULV Processors Features of AMD First-generation CULV Microprocessors
- AMD Second-generation CULV Microprocessor Features
- AMD Third-generation CULV Processors VIA Second-generation ULV Microprocessors Features
- Features of VIA Third-generation ULV Microprocessors
- Comparison of Intel Notebook CPU Pricing