

EE Times: Latest News
Semico raises notebook forecast

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Semico Research expects the notebook PC market to reach sales of \$120.3 billion in 2006, up from \$95.5 billion in 2005.

Revised estimates put growth for the global notebook market at 60 million units in 2005, up from an earlier forecast of 57.5 million units, Tony Massimini, chief of technology at the Phoenix-based research firm, said Wednesday. "Notebook PCs are expected to remain in demand through 2006, growing 25 percent to about 75 million units," he said.

Boosting forecasts is the latest quarterly revenue reports from Advanced Micro Devices Inc. and Intel Corp., which should leave little doubt that the notebook PC market is healthy, said Massimini.

AMD on Oct. 11 reported net income of \$76 million on \$1.523 billion revenue, for the quarter ended Sept. 25, up from \$44 million and \$1.239 billion, respectively, for the year-ago quarter. AMD reported record mobile processor sales for the quarter, and that the AMD Turion 64 sales grew 72% sequentially during the three months.

Similarly, Intel on Oct. 18, reported net income of \$2 billion on record revenue of \$9.96 billion for the third quarter, up 5 percent and 18 percent, respectively. Main power unit sales within Intel's Mobility Group grew 13.4 percent, sequentially, and 48.4 percent year over year. For the first nine months of 2005, mobile MPU sales are up 59.3 percent compared with 2004.

Massimini said both Intel and AMD have been steadily introducing mobile MPUs with feature and performance that rival desktop PCs such as improved power consumption and wireless connectivity.

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