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2011 Slowdown?

With semiconductor revenues up 30%+ this year, there is a lot of speculation going on about a slow down for 2011. Semico's IPI is forecasting ~13% increase in 2011.

Want to learn more? E-mail [Sam Caldwell](#) for more information.



Semico Spin

Apple iPad in big demand, can Apple keep up?

Apple reported in its last financial results that as of June 26, 2010 it has shipped 3.27 million iPads. This is the first quarter of availability for the iPad. It is shipping at the rate of about 1 million units per month. However, keep in mind that there was a large amount of pre-orders prior to its April launch.

The question is can Apple ramp up production to meet demand? Apple's Steve Jobs has stated since its launch that demand for iPad has been stronger than expected. Apple has been rolling out iPad to markets outside the US in select countries at different times rather than an all out world wide blitz.

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E-reader Market Update

When Semico released our e-reader report, one of the predictions we made was that Amazon would introduce an updated Kindle this quarter. They were right on track and are estimating new orders will ship September 10th. This was a highly anticipated step, considering all the new competition and great products being introduced to the market.

The main purpose of the Kindle is to sell ebooks for Amazon, and it has been a very successful endeavor. In order to sell more ebooks, Amazon has released a Kindle app that can work on phones, iPods, the iPad, and computers. As this market continues to mature, publishers have become more interested in interactive books with embedded video and audio. The Kindle app now supports these features along with Apple's iBooks app, making cell phones, iPods, and the iPad, decent e-readers, though they lack the electronic ink display.

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Sincerely,

The Semico Team

About Semico... We are a semiconductor marketing & consulting research company located in Phoenix, Arizona. Semico was founded in 1994 by a group of semiconductor industry experts. We have improved the validity of semiconductor product forecasts via technology roadmaps in end-use markets. Semico offers custom consulting, portfolio packages, individual market research studies and premier industry conferences.