

Embedded Control Competitive Profiles 2003

August 2003

Study No. ML108-03

© Copyright Semico Research Corp., 2003. All rights reserved.

Reproduction in whole or part is prohibited without the express written permission of Semico.

The contents of this report represent the interpretation and analysis of statistics and information that is generally available to the public or released by responsible agencies or individuals, but is not guaranteed as to its accuracy or completeness.

Table of Contents

Table of Contents	i
List of Tables	ii
List of Figures.....	iii
Executive Summary	1
Methodology and Overview	3
Total Embedded Control.....	4
Total MCU, Embedded MPU and DSP	5
Total MCU and Embedded MPU (excluding DSP)	10
Total MCUs.....	13
Total MCUs (including DSP).....	14
Total MCU (excluding DSP)	17
4-bit MCU Market Share	20
8-bit MCU Market Share	22
16-bit MCU Market Share	26
32-bit or greater MCU Market Share	29
DSP	32
Embedded MPUs.....	35
Total Embedded MPUs	35
8-bit MPU Market Share	37
16-Bit MPU Market Share	39
Embedded 32-bit or greater MPU Market Share	41
MCUs and Embedded MPUs	45
16-bit MCUs and Embedded MPUs	45
32-bit or Greater MCUs and Embedded MPUs	47
8051 Market	49
Chip Vendor Product Lineups.....	51

List of Tables

Table 1: Total Embedded Control Market Share (incl. DSP), 2002 and 2001	6
Table 2: Total Embedded Control Market Share (excl. DSP), 2002 and 2001	11
Table 3: Total MCU (incl. DSP) Market Shares, 2002 and 2001	15
Table 4: Total MCU (excl. DSP) Market Shares, 2002 and 2001	18
Table 5: 4-bit MCU Market Share, 2002 and 2001	21
Table 6: 8-bit MCU Market Share, 2002 and 2001	23
Table 7: 16-bit MCU Market Share, 2002 and 2001	27
Table 8: 32-bit or Greater MCU Suppliers, 2002 and 2001	30
Table 9: DSP Market Share, 2002 and 2001	33
Table 10: Total Embedded MPU Market Share, 2002 and 2001	36
Table 11: 8-Bit MPU Market Share, 2000 2002 and 2001	38
Table 12: 16-Bit MPU Market Share, 2002 and 2001	40
Table 13: 32-bit or Greater Embedded MPU Vendor Market Shares, 2002 and 2001	42
Table 14: 16-bit MCU and Embedded MPU Market Share, 2002 and 2001	46
Table 15: 32-bit or Greater MCUs and MPUs Market Share, 2002 and 2001	48
Table 16: Chip Vendor Market Share for 8051 MCU Market, 2002 and 2001	50
Table 17: Motorola Embedded Control Product Portfolio, 2002 and 2001	51
Table 18: Texas Instruments Embedded Control Product Portfolio, 2002 and 2001	51
Table 19: Hitachi Embedded Control Product Portfolio, 2002 and 2001	52
Table 20: Intel Embedded Control Product Portfolio, 2002 and 2001	52
Table 21: NEC Embedded Control Product Portfolio, 2002 and 2001	52
Table 22: Mitsubishi Embedded Control Product Portfolio, 2002 and 2001	53
Table 23: Infineon Embedded Control Product Portfolio, 2002 and 2001	53
Table 24: Philips Embedded Control Product Portfolio, 2002 and 2001	53
Table 25: Renesas Embedded Control Product Portfolio, 2002 and 2001	54

List of Figures

Figure 1: Total Embedded Control (incl. DSP), Top Ten Suppliers, 2002 and 2001	5
Figure 2: Total Embedded Control (excl. DSP), Top Ten Suppliers, 2002 and 2001	10
Figure 3: Total MCUs (incl. DSP), Top Ten Suppliers, 2002 and 2001	14
Figure 4: Total MCUs (excl. DSP), Top Ten Suppliers, 2002 and 2001	17
Figure 5: Top Ten 4-bit MCU Suppliers, 2002 and 2001	20
Figure 6: Top Ten 8-bit MCU Suppliers, 2002 and 2001	22
Figure 7: Top Ten 16-bit MCU Suppliers, 2002 and 2001	26
Figure 8: Top Ten 32-bit or Great MCU Suppliers, 2002 and 2001	29
Figure 9: Top Ten DSP Suppliers, 2002 and 2001.....	32
Figure 10: Top Ten Suppliers Total Embedded MPUs, 2002 and 2001	35
Figure 11: Top Suppliers of 8-bit MPUs, 2002 and 2001	37
Figure 12: Top Suppliers of 16-bit MPUs, 2002 and 2001	39
Figure 13: Top Ten Suppliers of 32-Bit or greater Embedded MPUs, 2002 and 2001.....	41
Figure 14: Top Ten Suppliers of 16-bit MCUs and Embedded MPUs, 2002 and 2001	45
Figure 15: Top Ten Suppliers of 32-bit or Greater MCUs and MPUs, 2002 and 2001	47
Figure 16: Chip Vendor Market Share for 8051 MCU Market, 2002 and 2001	49