Processors for Network Infrastructure Market Tracker

By Tom Hackenberg, Principal Analyst & Kelson Astley, Analyst

Outside of data processing compute platforms, network infrastructure represents one of the markets with the greatest demand for high performance processors. While the market for PCs appears to have peaked, the demand for network infrastructure devices is expected to continue growing steadily. The overall market for computers is not likely to diminish anytime soon, but companies invested in providing high performance processors recognize that megatrends like streaming video, IoT and edge computing demand strategies to tap growth in network infrastructure. Traditional microprocessor vendors are not the only ones eyeing this market for growth, the applications processor and system-on-chip suppliers are similarly looking for strategies to sustain growth as the smartphone and tablet markets begin to plateau.

Network infrastructure continues to evolve to meet new and growing demands from digital telecommunications, internet-of-things (IoT) applications, cloud computing, content streaming, smart home, smart city, connected car, Industry 4.0, and the rollout of 5G. Supporting these applications involves challenges to increase network bandwidth, integrity and security. Many players in this market understand the traditional serviceable market of core network devices, but supporting only traditional designs can be limiting with respect to the broader optimization and efficiency strategies for today’s robust network. Due to the tremendous parallel processing demand of network appliances, a majority of revenue is actually in integrated logic and coprocessing solutions for the processor complex. Tapping this is critical for growth.

In this report, IHS Markit leverages its robust coverage of the semiconductor market with the recognized industry leading Infonetics Research understanding of communications equipment to bring you unprecedented coverage of high-performance processors in network infrastructure.
LEAD ANALYSTS
Tom Hackenberg – Principal Analyst, Embedded Processors
Tom provides expertise on the market for microcontrollers and digital signal processors across a broad range of application specific, multimarket and general-purpose applications. Tom is well versed in all processor components including CPUs, GPUs, MPUs, MCUs, ASICs & ASSPs, FPGAs and configurable processors. He also supports the Automotive Semiconductors group developing a more in-depth perspective in the largest revenue market for microcontrollers.
Tom comes to IHS through IHS acquisition of IMS Research in 2012; at IMS Research his specialization was in semiconductors and embedded processing research since 2006. Tom holds a BSEE specializing in Processors and FPGAs.

Kelson Astley – Analyst, Embedded Processors
Kelson Astley joined IHS-Markit as an Analyst for Embedded Processors and is his broad scope of processor coverage includes microcontrollers (MCU), microprocessors (MPU), signal processors (DSP) and logic component markets. In addition to component coverage, Kelson provides calculated knowledge related to deeply embedded systems in telecommunications equipment. As part of his research scope, he contributes to custom reports on processors in telecommunications markets.
Kelson has a background in industrial automation and is leveraging that knowledge to aid in the analysis for processor markets. He holds a Bachelor of Science in Electronics Engineering from Texas A&M University with a focus on embedded design and mechatronics.

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Key Issues Addressed
- Who are the leading suppliers of network infrastructure processors?
- What is the market size and forecast for various types of processors and coprocessors?
- How is increasing bandwidth driving a processor evolution without major increases in network equipment Capex?
- What is NFV and how is it affecting processors in network infrastructure?
- What are uCPE and why are they important?
- How will media consumption, the Internet of Things and 5G traffic cause network appliances to evolve?
- Will the network of the future include artificial intelligence?

Database Content Summary

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- Processor design trends
- Special purpose and coprocessor trends

Report Table of Contents
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- Class Summary
- Application Market Summary
- Market Application Channel Tables
- Supplier Market Share

Applicable To
- Network processor suppliers
- Foundry services
- IP providers
- Network operating system vendors
- Network software developers
- Related component suppliers: memory, transceiver, etc.
- IoT, edge and other network solutions specialists
- Network appliance and server OEMs
- Network security specialists

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