Backplane Transceiver Market Opportunities, Strategies, and Forecasts, 2004 to 2009

Backplane Transceiver

Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

WinterGreen Research, Inc.
Lexington, Massachusetts

www.wintergreenresearch.com

REPORT # SH29821322 285 PAGES 79 TABLES AND FIGURES 2004 $2,800

CHECK OUT THESE KEY TOPICS

BACKPLANE TRANSCEIVER MARKET SHARES
WORLDWIDE BACKPLANE TRANSCEIVER MARKET FORECASTS
BACKPLANE TRANSCEIVER DRIVING FORCES
Increasingly Sophisticated Systems
Communications IC Opportunity
Gigabit Ethernet (GbE) Transition
CHANGING BACKPLANES
STORAGE AND SERIAL BACKPLANE PRODUCTS
INTEL PCI EXPRESS ARCHITECTURE
STAR TOPOLOGY
MESH BACKPLANE
MULTI-POINT BACKPLANE
FAST BACKPLANE
BACKPLANE TRANSCEIVERS
ETHERNET IC MARKET FORECASTS
SYSTEM MODELING

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.
Lexington, Massachusetts
www.wintergreenresearch.com

REPORT # SH29821322 285 PAGES 79 TABLES AND FIGURES 2004 $2,800

Backplane Transceiver Market Opportunities, Strategies, and Forecasts, 2004 to 2009

Demand for Internet services, need for improved copper line conditions need to extend reach of copper lines, and increases in network traffic are major backplane transceiver market driving forces.

Switch fabric, crosspoint switch, and backplane transceiver markets impact the entire network architecture for communications. These markets are looked as one entity because they address the same issue, how to move packets across the backplane. Two significant market shifts are occurring. The old circuit switch architecture depended on one clock in Denver to create simultaneity for all the logic in all the proprietary circuit switch hardware.

With the Internet cloud architecture, the one clock is gone and all the switches that move packets have different clocks. The shift in architecture puts more stress on the components that create switching capability in the network. These units have to operate at higher speeds and with more flexibility to handle the traffic that is being generated by the Internet. Combined voice, video, and data traffic is moving across the same switches at the same time, creating demand for new types of switch IC. The transfer of information from the line card or motherboard to the backplane is moving from a parallel to serial architecture. This in turn gives rise to demand for new types of IC.

Blade servers are replacing to old circuit switches and the proprietary PBX hardware. Clustered blade servers with carrier grade Linux operating systems create computer industry hardware that can be used with proprietary software.

Switch fabric, crosspoint switch, and backplane transceiver markets at $101.2 million in 2003 are expected to reach $579.6 million by 2009.

Market growth is expected to be spurred by demand for storage and video capable networks. Higher speeds complement existing infrastructure. Gigabit Ethernet IC markets will drive demand for high-speed communications. Asynchronous IC communications capability provided by crosspoint switches permits design flexibility. Different protocols are supported.

REPORT # SH29821322 285 PAGES 79 TABLES AND FIGURES 2004 $2,800

Different solutions address the same issue, how to move packets across the backplane. Backplane transceivers are a significant aspect of the issue. Significant market shifts are occurring. The old circuit switch architecture depended on one clock in Denver to create simultaneity for all the logic in all the proprietary circuit switch hardware.

With the Internet cloud architecture, the one clock is gone and all the switches that move packets have different clocks. The shift in architecture puts more stress on the components that create switching capability in the network.

These units have to operate at higher speeds and with more flexibility to handle the traffic that is being generated by the Internet. Combined voice, video, and data traffic is moving across the same switches at the same time, creating demand for new types of switch IC.

In addition, the transfer of information from the line card or motherboard to the backplane is moving from a parallel to serial architecture. This in turn gives rise to demand for new types of IC.

Backplane transceiver markets in dollars at $8.8 million in 2003 are expected to reach $22 million by 2009.

Companies Profiled

Market Leaders

Worldwide Crosspoint Switch, Switch Fabric, and Backplane Tranceiver

Applied MicroCircuit Corporation(AMCC)/IBM
Vitesse
Agere
MIndspeed

Backplane Transceiver

Accelerant Technologies
Agere
Analog Devices
Applied MicroCircuit Corporation(AMCC)/IBM

Other Market Participants

Mindspeed
Vitesse
Aeluros
Broadcom
Conexant Systems
Dune Networks
Erlang Technology
Exar
Fairchild Semiconductor
Infineon Technologies
Intel
Marvel Technology
Maxim Integrated Products
National Semiconductor
ON Semiconductor
Teadyne
TriQuint Semiconductor

Backplane Transceiver Market Strategies and Forecasts,

2004-2009

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND SEVENTH* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, AND TELEPHONE EQUIPMENT. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT.

YOU MUST HAVE THIS STUDY

REPORT # SH29821322 285 PAGES 79 TABLES AND FIGURES 2004 $2,800

Backplane Transceiver Market Opportunities, Strategies, and Forecasts, 2004 to 2009

Table of Contents

BACKPLANE TRANSCEIVER SWITCH EXECUTIVE SUMMARY

BACKPLANE TRANSCEIVER MARKET DYNAMICS AND MARKET DESCRIPTION

BACKPLANE TRANSCEIVER MARKET SHARES AND MARKET FORECASTS

REPORT # SH29821322 285 PAGES 79 TABLES AND FIGURES 2004 $2,800

BACKPLANE TRANSCEIVER PRODUCT DESCRIPTION

List of Tables and Figures

BACKPLANE TRNASCEIVER EXECUTIVE SUMMARY

BACKPLANE TRANSCEIVER MARKET DYNAMICS AND MARKET DESCRIPTION

CROSSPOINT SWITCH MARKET SHARES AND MARKET FORECASTS

BACKPLANE TRANSCEIVER PRODUCT DESCRIPTION

BACKPLANE TRANSCEIVER TECHNOLOGY

SWITCH FABRIC / CROSSPOINT SWITCH / BACKPLANE TRANSCEIVER COMPANY PROFILES

ABOUT THE COMPANY

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT WILL EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULITPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

REPORT # SH29821322 285 PAGES 79 TABLES AND FIGURES 2004 $2,800

WINTERGREEN RESEARCH, INC.

ORDER FORM

Return To: **WinterGreen Research, Inc.**
6 Raymond Street
Lexington, MA 02421 USA
Phone: (781) 863-5078 --- Fax: (781) 863-1235 or (781) 860-0897

PLEASE ENTER MY ORDER FOR:

Backplane Transceiver Market Opportunities, Strategies, and Forecasts 2004-2009

-ALL REPORTS ARE AVAILABLE IN EITHER PRINT OR PDF-

_____PDF _____PRINT

____ENCLOSED IS MY CHECK FOR $2,800 FOR SINGLE COPY, $3,800 FOR WEB SITE POSTING

____PLEASE BILL MY COMPANY USING P.O. NUMBER_____

____PLEASE CHARGE MY MASTERCARD/VISA/AMERICAN EXPRESS—

CARD NUMBER _____EXP. DATE_____
If charging to a Credit card you may e-mail the order form, but not the card information
Fax or Call with credit card information - Do not send card number as e-mail - You may send the order as e-mail

____ADDITIONAL COPIES, @ $375 (EXTRA COPY PRICE IN EFFECT ONLY WITH INITIAL ORDER)

NAME_____TITLE_____

SIGNATURE_____

COMPANY_____DIVISION_____
_

ADDRESS_____

CITY_____STATE /
ZIP_____

TELEPHONE_____

FAX_____

EMAIL_____

PLEASE NOTE: RESIDENTS OF MASSACHUSETTS AND CONNECTICUT MUST INCLUDE APPROPRIATE SALES TAX

SUBSCRIBERS OUTSIDE THE UNITED STATES MUST PROVIDE PREPAYMENT IN U.S. FUNDS

REPORT # SH29821322 285 PAGES 79 TABLES AND FIGURES 2004 $2,800