

**XAUI Market Opportunities, Strategies, and Forecasts,
2007 to 2013**

XAUI



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

CHECK OUT THESE KEY TOPICS

XAUI TRANSCEIVER MARKET FORECASTS
Backplane Transceiver Market Shares
XAUI Transceiver market Driving Forces

Optical Interconnects In Servers

High Speed XAUI Interface Market Driving Forces
XAUI Tyco Interoperability Backplane HM-Zd Adapter

OPTICAL INTERCONNECTS WITHIN SMP SERVERS

BACKPLANE TRANSCEIVER MARKET FORECASTS

10GBASE-CX4 CABLES

PRE-EMPHASIS DYNAMIC RANGE REQUIREMENT IMPACT
SERVER PHYSICAL INTERCONNECT HIERARCHY MAPPING TO
LOGICAL HIERARCHY

INDUSTRY STANDARDS FOR 10-Gb/S ETHERNET, FIBRE
CHANNEL, AND INFINIBAND

OPPORTUNITY ABOUND

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XAUI Market Opportunities, Market Forecasts, and Market Strategies, 2007-2013

Demand for Internet services, the implementation of broadband and InfiniBand are major backplane transceiver market driving forces. The copper based transceivers are extending their technology life by implementing equalization flexibility to meet conditions needed to extend copper based backplane technology because is less expensive.

A high speed XAUI interface means fewer links are needed to communicate with each other compared to competitive solutions. A 10 Gb/s full duplex interposer device supports up to four 2.5 Gb/s NPUs for full-duplex traffic. It can perform as a single-chip 4 x 2.5 Gb/s switch fabric, while providing excellent QoS support.

Gigabit Ethernet will last for three more years, but InfiniBand is slated to become a replacement technology after that time. With the quantity of information doubling every seven months, there is increasing pressure to improve systems performance and support high speed data transport inside servers and routers, and in the network.

Worldwide XAUI depend on Ethernet switch and router market shipments. These markets are anticipated to have significant growth as broadband penetrates the Internet and wireless handset markets.

The backplane transceiver technology market includes copper based technologies, QSFP (Quad Small Form-Factor Pluggable) transceiver modules for InfiniBand, physical serial products, XAUI, and VCSEL based backplane transceiver products used for the support of network bandwidth growth. The demand for broadband is impacting wireless transport, creating demand for different types of backhaul.

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.

Backplane transceiver markets in dollars at \$95.3 million in 2006 are expected to reach \$929.5 million by 2013. This growth is in part a result of the fact that the quantity of information is doubling every 7 months.

Companies Profiled

Market Leaders

Vitesse
Mindspeed

Market Participants

Accelerant Networks

Analog Devices

AMCC

BiRa

Conexant Systems

Dune Networks

Fairchild

Infineon

Intel

Marvell

National Semiconductor

PMC-Sierra

Teradyne

Zarlink

Agere Systems

Aeluros

Avago

Broadcom

Dallas Semiconductor

EXAR

Hitachi/Maxwell

IDT

Lattice Semiconductor

Maxim Integrated Products

On Semiconductor

Siemens/Dasan Networks

Triquint

XAUI Strategies and Forecasts, 2007-2013

REPORT METHODOLOGY

THIS IS THE 298TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. 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. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

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XAUI TRANSCEIVER TECHNOLOGY

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT 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.

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