

# Global PICMG Half-size Single Board Computer Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global PICMG Half-size Single Board Computer market size is expected to reach \$ 274 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

PICMG half-size single board computers are slot-based motherboards for industrial and embedded systems. Their core value lies in delivering high computing performance, flexible expansion, and fast maintenance within compact chassis through a card-on-backplane architecture, addressing the upgrade, expansion, downtime, and lifecycle-management limitations of conventional integrated industrial motherboards. Based on official product pages, this category spans multiple processor tiers from low-power Atom and Pentium M platforms to Core and Xeon platforms, and supports both PICMG 1.0 and PICMG 1.3 standards. Common capabilities include DDR4 or DDR5 memory, PCIe or PCI expansion, dual LAN, multi-display support, SATA RAID, M.2, and industrial I/O interfaces. This allows the products to serve both legacy-bus compatibility requirements in installed equipment and demanding applications such as machine vision, factory automation, medical equipment, digital signage, transportation, and edge computing, where reliability and serviceability matter. These products are typically delivered not as standalone boards only, but as platform solutions bundled with backplanes, chassis, thermal design, drivers, and longevity support, making the business model a mix of standard board sales and project-based customization.

PICMG half-size single board computers are not a mass-market category designed for broad consumer-volume shipments. Instead, they are a highly resilient niche platform within the industrial computing ecosystem. Their value lies not merely in delivering compute performance, but in combining computing, expansion, maintainability, and lifecycle management within one industrial architecture. For many automation systems,

machine vision platforms, medical terminals, and transportation control devices, the system must support acquisition cards, motion-control cards, communication cards, or dedicated I/O within a limited chassis, while still allowing easy field replacement and future upgrades. This is exactly why half-size PICMG boards continue to exist. Compared with integrated industrial motherboards, this category preserves stronger expansion flexibility through a backplane-based architecture and reduces system redesign complexity through standardized interfaces. Official product pages also show that vendors do not treat these products as isolated boards; instead, they position them inside a broader product family that includes industrial motherboards, backplanes, chassis, and platform solutions. That means this category functions more like an industrial infrastructure component than a standalone part. For that reason, although it may not be highly visible in mainstream markets, it maintains strong substitution barriers in industrial environments that require long product life, rapid repair, and stable expansion.

From a demand-evolution perspective, this category is developing into a clear dual-track market. One track is legacy upgrade, meaning life extension and replacement demand for installed PICMG or PCI-based systems. These customers prioritize bus compatibility, form-factor fit, low retrofit cost, and long-term serviceability, which is why low-power, half-size, and optionally fanless products still retain practical value. The second track is the new wave of high-performance industrial edge computing demand. In machine vision, smart manufacturing, edge data acquisition, and high-reliability control scenarios, customers want to preserve the advantages of slot-based architecture while introducing stronger Core or Xeon platforms, larger memory capacity, faster networking and storage interfaces, and richer PCIe resources. Current product pages show that 64 GB-class memory, M.2, RAID, dual LAN, multi-display, and high-bandwidth expansion have already become key features of higher-end models. This indicates that half-size PICMG has not remained merely a legacy compatibility component, but is continuing to evolve into a higher-performance industrial platform. Future growth is therefore unlikely to come from consumer-style scale expansion, and more likely to come from installed-base industrial upgrades, automation line modernization, and deployment of highly reliable edge-intelligent equipment.

From a regional and external-environment perspective, the supply side of this category has formed a clear East Asian cluster structure, with Taiwan as the most important center for manufacturing and R&D, while Japan retains representative industrial-computing vendors. These suppliers then reach overseas markets through multilingual websites, regional sales entities, and global channels. Regional concentration does not imply a narrow market. On the contrary, these products naturally serve global demand

in industrial automation, transportation, healthcare, and embedded-system upgrades, meaning their consumption footprint can expand alongside manufacturing digitalization. Especially in 2025 and 2026, policy momentum around smart manufacturing, industrial internet, AI-enabled manufacturing, and industrial digital transformation continues to strengthen. That directly reinforces investment logic for on-site computing nodes, data-acquisition nodes, and maintainable control platforms. While half-size PICMG boards may not always appear as a direct policy target in official documents, they stand to benefit as part of the industrial control and edge-computing hardware layer. In other words, the category's medium- to long-term outlook does not depend on becoming a headline concept, but on whether it continues to serve as a high-reliability foundational component in industrial system upgrades. Based on current product-roadmap signals from official pages, that outlook is relatively positive.

This report studies the global PICMG Half-size Single Board Computer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PICMG Half-size Single Board Computer and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of PICMG Half-size Single Board Computer that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global PICMG Half-size Single Board Computer total production and demand, 2021-2032, (Units)

Global PICMG Half-size Single Board Computer total production value, 2021-2032, (USD Million)

Global PICMG Half-size Single Board Computer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global PICMG Half-size Single Board Computer consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: PICMG Half-size Single Board Computer domestic production, consumption, key domestic manufacturers and share

Global PICMG Half-size Single Board Computer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global PICMG Half-size Single Board Computer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global PICMG Half-size Single Board Computer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global PICMG Half-size Single Board Computer market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Advantech, Axiomtek, ADLINK, IEI Integration, Portwell, IBASE, AAEON, NEXCOM International Co., Ltd., Taiwan Commate Computer Inc. (COMMELL), Contec Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PICMG Half-size Single Board Computer market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global PICMG Half-size Single Board Computer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global PICMG Half-size Single Board Computer Market, Segmentation by Type:

PICMG 1.0

PICMG 1.1

PICMG 1.2

Others

#### Global PICMG Half-size Single Board Computer Market, Segmentation by Memory Reliability:

ECC Supported

Non-ECC

#### Global PICMG Half-size Single Board Computer Market, Segmentation by Bus Type:

PCI ISA

PCIe

Others

## Global PICMG Half-size Single Board Computer Market, Segmentation by Application:

Energy and Power

Data Centers

Military and Aerospace

Education and Research

General Industrial

Others

## Companies Profiled:

Advantech

Axiomtek

ADLINK

IEI Integration

Portwell

IBASE

AAEON

NEXCOM International Co., Ltd.

Taiwan Commate Computer Inc. (COMMELL)

Contec Co., Ltd.

## Key Questions Answered:

1. How big is the global PICMG Half-size Single Board Computer market?
2. What is the demand of the global PICMG Half-size Single Board Computer market?
3. What is the year over year growth of the global PICMG Half-size Single Board Computer market?
4. What is the production and production value of the global PICMG Half-size Single Board Computer market?
5. Who are the key producers in the global PICMG Half-size Single Board Computer market?
6. What are the growth factors driving the market demand?

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