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Global PICMG Half-size Single Board Computer Market Growth 2026-2032

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Abstracts

The global PICMG Half-size Single Board Computer market size is predicted to grow from US$ 184 million in 2025 to US$ 265 million in 2032; it is expected to grow at a CAGR of 5.4% from 2026 to 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,

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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

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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.

LP Information, Inc. (LPI) ' newest research report, the ?PICMG Half-size Single Board Computer Industry Forecast? looks at past sales and reviews total world PICMG Half-size Single Board Computer sales in 2025, providing a comprehensive analysis by region and market sector of projected PICMG Half-size Single Board Computer sales for 2026 through 2032. With PICMG Half-size Single Board Computer sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world PICMG Half-size Single Board Computer industry.

This Insight Report provides a comprehensive analysis of the global PICMG Half-size Single Board Computer landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on PICMG Half-size Single Board Computer portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global PICMG Half-size Single Board Computer market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for PICMG Half-size Single Board Computer and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global PICMG Half-size Single Board Computer.

This report presents a comprehensive overview, market shares, and growth

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opportunities of PICMG Half-size Single Board Computer market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

PICMG 1.0

PICMG 1.1

PICMG 1.2

Others

Segmentation by Memory Reliability:

ECC Supported

Non-ECC

Segmentation by Bus Type:

PCI ISA

PCIe

Others

Segmentation by Application:

Energy and Power

Data Centers

Military and Aerospace

Education and Research

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General Industrial

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

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Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Advantech

Axiomtek

ADLINK

IEI Integration

Portwell

IBASE

AAEON

NEXCOM International Co., Ltd.

Taiwan Commate Computer Inc. (COMMELL)

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Contec Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global PICMG Half-size Single Board Computer market?

What factors are driving PICMG Half-size Single Board Computer market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do PICMG Half-size Single Board Computer market opportunities vary by end market size?

How does PICMG Half-size Single Board Computer break out by Type, by Application?

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