

# Programmable Logic ICs Market Shares and Forecasts Worldwide, 2010 to 2016



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## Programmable Logic ICs Market Shares and Forecasts Worldwide, 2010 to 2016

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WinterGreen Research announces that it has a new study on Programmable Logic ICs Market Shares and Forecasts, Worldwide, 2010-2016. The 2010 study has 287 pages, 148 tables and figures.

Programmable logic vendors are able to address an increasing number of ASIC and ASSP opportunities. As ASICs and ASSPs are displaced by FPGAs a significant market opportunity opens.

Competitive factors in the logic IC industry include product pricing, time-to-market, product performance, reliability, quality, power consumption and density, and field upgradability. Portable electronics are experiencing rapid growth. Segments include consumer, medical, industrial, and military.

Programmable logic IC markets are driven by the benefits of added convenience and increased productivity. Portable electronic design is becoming more challenging as product revisions require more advanced feature function packages. Improved performance is needed to achieve competitive advantage.

Programmable logic ICs decrease power consumption. Demand for longer battery life is increasing. Demands for improvements in the portable electronics markets include need for low active and static power consumption, small footprint packages, design security, higher integration, and live at power-up. The principal competitive factors in the PLD market include demand for broadband applications and broadband enabled devices.

Altera Stratix IV family has been the fastest ramping FPGA product in the history of the PLD industry. Customer familiarity with existing vendors and entrenched products are compelling market forces. Vendors position to compete favorably with respect to these factors. Proprietary device architecture and installed base of software development systems provides competitive advantage. Due to unique architectural innovation and advanced technologies, product families provide varying degrees of competitive advantage.

Market leaders provide greater functionality and lower power consumption at a lower price for any given density compared to the predecessor products. Newer product features such as multi-gigabit transceivers and programmable power technology have enhanced our design win rate relative to other PLD vendors.

New product families are positioned to compete favorably against ASICs and ASSPs. Programmable logic ICs are positioned to compete against other types of chips such as microcontrollers, microprocessors, and digital signal processors.

Designers can add functionality of chips. Features can be added to PLDs using prebuilt and pre-verified IP cores. An IP core is typically offered in either a hard or soft form. A hard IP core is embedded into the actual circuitry of chips. A soft IP core is a licensed design file that customers incorporate into their design and program onto the PLD.

By incorporating more functionality and logic capacity on a programmable chip while providing the necessary design tools and IP cores to design a reliable system, programmable logic vendors can enhance the advantages of PLDs over competing solutions.

As is true of the semiconductor industry as a whole, the digital logic segment and the PLD sub-segment are

intensely competitive, and each successive product generation is characterized by rapid technological change and price decline.

Programmable logic devices (PLDs) are semiconductor logic blocks that can be programmed after they are manufactured. The most common PLDs are Field- Programmable Gate Array (FPGAs).

Programmable logic integrated circuit markets are poised to achieve significant growth because the programmable units have an opportunity to achieve ASIC and ASSC market segment penetration. With increasingly shortened product cycles and higher costs to develop a component, the programmable logic components become an attractive alternative to the more rigid semiconductor devices.

The "process technology gap" between PLDs and ASIC and ASSP alternatives will increase over time and, when combined with the traditional PLD advantages of greater flexibility, lower development cost, and faster time-to-market, should drive the accelerated adoption of PLDs.

A decline in programmable logic semiconductor product selling prices has increased the opportunity for growth in the market with programmable units becoming more competitive with the ASIC devices as the total costs of development is considered. As the selling prices of products have decreased over time, vendors have been able to offset the selling price decreases by reducing manufacturing costs, improving yields, and increasing unit sales.

Ongoing efforts to keep pace with the decline in prices is a significant market factor. Revenues and gross margins are a matter of constant concern in the industry. International sales account for a majority of total sales.

Markets for programmable logic integrated circuit ICs at \$3.5 billion in 2009 are anticipated to reach \$9.6 billion by 2016, due in part to the demand for flexible devices to meet Internet and broadband opportunities.

Broadband market driving forces are articulated in part through the Internet on Ethernet networks. There are 2.5 billion Internet users. Wireless handsets are connecting to the broadband networks. There are 157 million broadband wireless handset users, out of a total 4.7 billion total wireless handset users. Cell phones have changed the world forever, they are inexpensive, affordable to almost every person on earth. Broadband is bringing the Internet to cell phones. Programmable logic ICs support broadband roll out.

According to Susan Eustis, President of WinterGreen Research, "Worldwide broadband markets are poised to achieve significant growth as broadband finds new uses and leverages existing ones. Costs of broadband devices are expected to decrease rapidly in response to the continuing economies of scale. Markets for Programmable logic ICs are compelling due to their innovation and flexibility."

### **Companies Profiled**

Xilinx  
Altera  
Lattice Semiconductor  
QuickLogic  
Actel

### **Report Methodology**

This is the 455th 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. Market share analysis

includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, 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 opinion leaders in the market segment.

## Table of Content

### **PROGRAMMABLE LOGIC IC EXECUTIVE SUMMARY**

Programmable Logic IC Executive Summary  
Programmable Logic Market Driving Forces  
Programmable Logic Market Shares  
Programmable Logic Market Forecasts  
The Programmable Logic Market

### **PROGRAMMABLE LOGIC IC MARKET DESCRIPTION AND MARKET DYNAMICS**

#### **1. PROGRAMMABLE LOGIC IC MARKET DESCRIPTION AND MARKET DYNAMICS**

1.1 Programmable Logic ICs Design Aspects  
1.2 Programmable Logic Devices PLDs Industry Overview  
    1.2.1 Digital Logic Overview  
1.3 Programmable Logic IC Tipping Point in the Semiconductor Industry  
1.4 Leveraging Enterprise Global Structure  
    1.4.1 Competing for Design Wins  
    1.4.2 Developing Competitive Products  
1.5 Cost-Optimized Product Strategy  
1.6 Programmable Logic IC Product Categories  
1.7 Low-Power Flash Devices

### **PROGRAMMABLE LOGIC IC MARKET SHARES AND MARKET FORECASTS**

#### **2. PROGRAMMABLE LOGIC IC MARKET SHARES AND FORECASTS**

2.1 Programmable Logic Market Driving Forces  
2.2 Programmable Logic Market Shares  
    2.2.1 Xilinx  
    2.2.2 Altera  
    2.2.3 Lattice Programmable Logic ICs  
    2.2.4 Actel  
    2.2.5 Programmable Logic IC Market Competition  
    2.2.6 Programmable Logic IC Segment Market Shares  
    2.2.7 High End Programmable Logic ICs Markets  
    2.2.8 Ultra Low Power Programmable Logic ICs Market Shares  
    2.2.9 Mixed Signal Programmable Logic ICs  
2.3 Programmable Logic Market Forecasts  
    2.3.1 Programmable Logic Device (PLD) Market Growth  
    2.3.2 Volume Point Where PLDs Are More Cost Effective Than ASICs  
    2.3.3 Programmable Logic IC Industry Segment Forecasts  
    2.3.4 High End Programmable Logic ICs  
    2.3.5 Mid Range Programmable Logic ICs  
    2.3.6 Low End Programmable Logic ICs  
    2.3.1 The Programmable Logic Market  
    2.3.2 Programmable Logic End Market Growth

- 2.3.3 Automotive Entertainment
- 2.3.4 Net Sales of FPGAs and CPLDs, and Other Products:
- 2.4 ASIC Semiconductor Market
  - 2.4.1 Tipping Point With Respect To Displacing ASICs And ASSPs With Programmable Logic ICs
  - 2.4.2 Competition From The ASIC Market
  - 2.4.3 Programmable Logic IC Strategy for Displacement of ASICs and ASSPs
  - 2.4.4 Cost Of Developing An ASIC Increasing
  - 2.4.5 Semiconductor Design Platforms
- 2.5 Programmable Logic Market Segments
- 2.6 Semiconductor Markets
  - 2.6.1 Discrete Semiconductor Devices
  - 2.6.2 Cost Of Developing An ASIC
  - 2.6.3 FPGAs Growth
  - 2.6.4 Primary Reasons for FPGA Wins
- 2.7 Selected Programmable Logic Prices
- 2.8 Programmable Logic Regional Revenue

## **PROGRAMMABLE LOGIC IC PRODUCT DESCRIPTION**

### **3. PROGRAMMABLE LOGIC IC PRODUCT DESCRIPTION**

- 3.1 Altera Programmable Logic Products
  - 3.1.1 Altera Stratix III and Stratix IV High-End, System-Level FPGAs
  - 3.1.2 Altera Arria and Arria II GX Mid-Range, Transceiver-Equipped FPGAs
  - 3.1.3 Altera Cyclone III and Cyclone IV Low-Cost FPGAs
  - 3.1.4 Altera MAX II CPLDs
  - 3.1.5 Altera HardCopy ASICs
  - 3.1.6 Altera Intellectual Property Cores
  - 3.1.7 Altera Development Tools
- 3.2 Xilinx
  - 3.2.1 Xilinx Silicon Products
  - 3.2.2 Xilinx Virtex FPGAs
  - 3.2.3 Xilinx Spartan FPGAs
  - 3.2.4 XilinxCPLDs
  - 3.2.5 XilinxEasyPath™ FPGAs
  - 3.2.6 XilinxDesign Platforms and Services Programmable Platforms
  - 3.2.7 Xilinx Domain-Specific Platform
  - 3.2.8 Xilinx Design Tools
- 3.3 Lattice Programmable Logic ICs
  - 3.3.1 Lattice Programmable Mixed Signal Families
  - 3.3.2 Lattice Power FPGA Positioning
- 3.4 Actel
  - 3.4.1 Actel Low-Power FPGAs
  - 3.4.2 Actel IGLOO Low-Power FPGAs Small Footprint
  - 3.4.3 Actel Portable Applications
  - 3.4.4 Actel Solutions
  - 3.4.5 Actel Total System Cost
  - 3.4.6 Actel Low System Cost
  - 3.4.7 Actel Security
- 3.5 Quicklogic
  - 3.5.1 Quicklogic Frame Recycler
  - 3.5.2 QuickLogic Wake-up and Verify (WAV)
  - 3.5.3 QuickLogic Smart Programmable Integrated Data Aggregator (SPIDA)
  - 3.5.4 QuickLogic Framebuffer Solution to Extend Battery Life of Consumer Devices

## **PROGRAMMABLE LOGIC IC TECHNOLOGY**

### **4. PROGRAMMABLE LOGIC IC TECHNOLOGY**

- 4.1 Aspects of High Reliability ICs
- 4.2 ASICs, ASSPs, and PLD Competitive Positioning
- 4.3 Node Level Power Dissipation
  - 4.3.1 Rapid Progress is Being Achieved for Development Methodology
- 4.4 ASIC / ASSP Development Cost Trend

## **PROGRAMMABLE LOGIC IC COMPANY PROFILES**

### **5. PROGRAMMABLE LOGIC IC COMPANY PROFILES**

- 5.1 Actel
  - 5.1.1 Actel Second Quarter 2010 Revenue
  - 5.1.2 Actel Net Revenues
- 5.2 Altera
  - 5.2.1 Altera High-Performance, High-Density Programmable Logic Devices
  - 5.2.2 Altera Net Sales By Customer Type
  - 5.2.3 Altera Segment and Geographic Information
  - 5.2.4 Altera Revenue
  - 5.2.5 Altera Market Overview
  - 5.2.6 Altera Sales Overview
  - 5.2.7 Altera Sales by Product Category
  - 5.2.8 Altera Net Sales By Product Category:
  - 5.2.9 Altera Sales by Market Segment
  - 5.2.10 Net sales of FPGAs and CPLDs, and Other Products:
  - 5.2.11 Altera Sales by Geography
- 5.3 Lattice
  - 5.3.1 Lattice MACHXO
  - 5.3.2 Lattice Revenue
  - 5.3.3 Lattice Semiconductor (NASDAQ: LSCC) Revenue
- 5.4 QuickLogic
  - 5.4.1 Quicklogic Customized Solutions
  - 5.4.2 QuickLogic CSSP Solution Concept
  - 5.4.3 QuickLogic Quick Facts
  - 5.4.4 QuickLogic Fiscal 2010 Second Quarter Revenue More Than Doubled Year over Year
  - 5.4.5 QuickLogic
  - 5.4.6 QuickLogic Announces Fiscal 2010 First Quarter Results - 27% Sequential Revenue Growth
  - 5.4.7 QuickLogic Revenue By Product and by Geography
- 5.5 Xilinx
  - 5.5.1 Xilinx Technology Drivers
  - 5.5.2 Xilinx Strategy
  - 5.5.3 Xilinx Revenue
  - 5.5.4 Xilinx Product Segments, Revenue For New, Mainstream, And Base Chips
  - 5.5.5 XilinxNet Revenues by End Markets
  - 5.5.6 Xilinx Net Revenue by Industry Segment
  - 5.5.7 Xilinx Net Revenues by Geography
  - 5.5.8 Xilinx Geographic Segment Information
  - 5.5.9 Xilinx Intellectual Property

## **LIST OF TABLES AND FIGURES**

## **PROGRAMMABLE LOGIC IC EXECUTIVE SUMMARY**

Figure ES-1 Programmable Logic IC, the Killer App

Table ES-2 Programmable Logic IC Market Driving Forces

Figure ES-3 Programmable Logic Market Shares, Dollars, 2009

Table ES-4 Programmable Logic ICs Market Forecasts Dollars, Worldwide, 2010-2016

## **PROGRAMMABLE LOGIC IC MARKET DESCRIPTION AND MARKET DYNAMICS**

Figure 1-1 Programmable Logic ICs Design Aspects

Table 1-2 Electronic Systems Different Types Of Digital Integrated Circuits

Table 1-3 Types of Logic Circuits

Table 1-4 Logic Circuit Product Variables

Figure 1-5 Flash Industry Specific Target Markets

## **PROGRAMMABLE LOGIC IC MARKET SHARES AND MARKET FORECASTS**

Figure 2-1 Programmable Logic IC, the Killer App

Table 2-2 Programmable Logic IC Market Driving Forces

Figure 2-3 Programmable Logic Market Shares, Dollars, 2009

Table 2-4 Programmable Logic ICs Market Shares Dollars, Worldwide, 2009 and H1 2010

Figure 2-5 Key Growth Opportunities for Xilinx

Figure 2-6 Xilinx Looks to Capture Existing ASIC and ASSP Revenue With Programmable Logic ICs

Figure 2-7 Xilinx Virtex-6 IC Programmable Logic Advances

Figure 2-8 High End Programmable Logic ICs Market Shares Dollars, Worldwide, H1 2010

Figure 2-9 High End Programmable Logic ICs Market Shares Dollars, Worldwide, H1 2010

Table 2-10 Ultra Low Power Programmable Logic ICs Market Shares, Dollars, Worldwide, H1 2010

Table 2-11 Mixed Signal Programmable Logic ICs Market Shares, Dollars, Worldwide, H1 2010

Table 2-12 Programmable Logic ICs Market Forecasts Dollars, Worldwide, 2010-2016

Table 2-13 Programmable Logic ICs Market Forecasts Dollars and Percent Growth, Worldwide, 2010-2016

Figure 2-14 High End Programmable Logic ICs Market Forecasts Dollars, Worldwide, 2010-2016

Figure 2-15 Mid Range Programmable Logic ICs Market Forecasts Dollars, Worldwide, 2010-2016

Figure 2-16 Low End Programmable Logic ICs Market Forecasts Dollars, Worldwide, 2010-2016

Table 2-17 Programmable Logic Integrated Circuit IC Market Forecasts, Units and Dollars, Worldwide, 2010-2016

Figure 2-18 Projected Growth PLD End Market Estimates

Table 2-19 Programmable Logic Device Market Industry Positioning

Figure 2-20 Automotive Entertainment Uses Programmable Semiconductor ICs

Figure 2-21 Programmable Logic FPGA and CPLD ICs Market Segments, Percent Worldwide, 2009

Figure 2-22 Programmable Logic FPGA and CPLD ICs Market Segments, Percent Worldwide, 2009

Table 2-23 Net Sales of FPGAs and CPLDs, 2007-2009

Table 2-24 Programmable Logic FPGA and CPLD ICs Market Segments Worldwide, 2009

Figure 2-25 Programmable ICs Opportunity Drivers

Figure 2-26 ASIC/ASSP Application Gap

Figure 2-27 Xilinx Virtex-6 Recent Design Wins Bu Industry Segment

Table 2-28 Primary Reasons for FPGA Wins

Table 2-28 (Continued) Primary Reasons for FPGA Wins

Table 2-28 (Continued) Primary Reasons for FPGA Wins

Figure 2-29 Programmable Logic Regional Revenue Q2 2010

Figure 2-30 Xilinx Programmable Logic Regional Revenue Q2 2010

Figure 2-31 Lattice Programmable Logic Regional Revenue Q2 2010

Figure 2-32 Quicklogic Programmable Logic Regional Revenue Q2 2010

Figure 2-33 Actel Programmable Logic Regional Revenue Q2 2010

Table 2-34 Altera Sales by Geography

## PROGRAMMABLE LOGIC IC PRODUCT DESCRIPTION

- Table 3-1 Altera Programmable Logic Device Categories
- Figure 3-2 Xilinx Virtex Next Generation Performance
- Table 3-3 Xilinx FPGA Product Positioning
- Figure 3-4 Xilinx Design Industrial Wins
- Figure 3-5 Xilinx Automotive Design Wins
- Figure 3-6 Xilinx TDP Positioning
- Figure 3-7 Xilinx Next Generation Software Platform
- Figure 3-8 Xilinx Unified Architecture Supports Range of Applications
- Figure 3-9 Xilinx Ultra High End FPGA
- Figure 3-10 Xilinx is Enabling Power Efficient Low End Applications
- Figure 3-11 Xilinx FPGA Innovation in Runtime
- Figure 3-12 Xilinx Virtex and Spartan Aerospace and Defense Design Wins
- Table 3-13 Xilinx Virtex-FPGA family High-Performance, 40-Nm Process Technology Optimized To Deliver Feature Mixes To Address A Variety Of Markets
- Table 3-14 Xilinx Sixth Generation Spartan FPGA Series FPGA Family
- Figure 3-15 Lattice FPGA Product Solutions
- Figure 3-16 Lattice Programmable Mixed Signal Family Roadmap
- Figure 3-17 Lattice Programmable Mixed Signal Families Benefits
- Figure 3-18 Lattice FPGA Product Positioning
- Table 3-19 Lattice Lower Power Components Benefits
- Figure 3-20 LatticeECP3 Static (Quiescent ) Power Consumption of vs. Competing FPGAs
- Figure 3-21 Total LatticeECP3 Power Consumption of vs. Competing FPGAs
- Table 3-22 Lattice Power Manager
- Table 3-23 Lattice Clock Manager
- Table 3-24 Actel IGLOO Series Of Low Power FPGAs Key Features
- Table 3-25 Actel IGLOO Series Devices
- Table 3-26 Actel IGLOO Series Of Low Power FPGAs Vertical Markets
- Table 3-27 Actel Series of FPGAs
- Table 3-27 (Continued) Actel Series Of FPGAs SmartFusion
- Figure 3-28 Actel IGLOO low-power FPGAs Small Footprint
- Figure 3-29 Actel IGLOO Low-Power FPGAs Battery Life in Hours, 50% Idle, 50% at 100 Mhz Operation
- Figure 3-30 Actel IGLOO Low-Power FPGAs Battery Life in Hours, 95% Idle, 5% at 100 Mhz Operation
- Table 3-31 Actel Component Functions
- Table 3-31 (Continued) Actel Component Functions
- Table 3-31 (Continued) Actel Component Functions
- Figure 3-32 Actel IDE, SDIO, USB, And Mini PCI Interface
- Figure 3-33 Actel Applications
- Table 3-34 Actel's Solution Segments
- Figure 3-35 Actel Mixed Signal Integration Features
- Table 3-36 Actel Nonvolatile Devices Key Benefits
- Figure 3-37 Actel Low Power
- Figure 3-38 Actel Low Power Advantage
- Table 3-39 Actel Features
- Table 3-39 (Continued) Actel Features
- Table 3-39 (Continued) Actel Features
- Figure 3-40 Actel Security Features
- Figure 3-41 Quicklogic Significantly Extends Handheld Device Battery Life with DPO
- Table 3-42 Quicklogic Solution Platform Family Integration
- Figure 3-43 Quicklogic Display Power Consumption Through Intelligent Control
- Table 3-44 QuickLogic SPIDA Smart Programmable Integrated Data Aggregator Technology Performance

## PROGRAMMABLE LOGIC IC TECHNOLOGY



Figure 4-1 Actel High Reliability ICs  
Table 4-1 ASIC, ASSP, and PLD Feature Comparison  
Figure 4-3 Node Level Power Dissipation  
Figure 4-4 Low Power Designs  
Figure 4-5 Innovation in Power Reduction Technologies  
Figure 4-6 Rapid Progress is Being Achieved for Development Methodology  
Figure 4-7 Xilinx Leadership in Partial Reconfiguration  
Figure 4-8 Xilinx Partial Reconfiguration Application  
Figure 4-9 Xilinx Anatomy of Targeted Design Platform  
Figure 4-10 ASIC / ASSP Development Cost Trend  
Figure 4-11 Balance Between Mid Market ICs and Ultra-High End Programmable Logic Devices

## **PROGRAMMABLE LOGIC IC COMPANY PROFILES**

Figure 5-1 Actel Profile  
Figure 5-2 Actel FPGA Solves ASIC Business Model Problems  
Figure 5-3 Actel FPGA Solves ASIC Business Model Problems as Cost of Design Increases at Smaller Nodes  
Figure 5-4 Actel FPGA Solves ASIC Business Model Problems as Number of Design Starts Decreasing with Shift to Smaller Nodes  
Figure 5-5 Actel Technology Roadmap  
Table 5-6 Actel Significant Developments During Q2 2010  
Figure 5-7 Actel Revenue by Geography, Q1 2010  
Figure 5-8 Actel Revenue by End Market, Q1 2010  
Figure 5-9 Actel Quarterly Net Revenues  
Figure 5-10 Actel Flash FPGA revenues  
Table 5-11 Altera Market Segments, Sub-Segments, and Application/Products  
Table 5-11 (Continued) Altera Market Segments, Sub-Segments, and Application/Products  
Table 5-11 (Continued) Altera Market Segments, Sub-Segments, and Application/Products  
Figure 5-12 Lattice Company Profile  
Table 5-13 Lattice PDL and FPGA Product Positioning  
Table 5-14 Lattice ECP3 Mid-Range FPGA Product Positioning  
Table 5-15 Lattice MACHXO Features  
Table 5-16 Lattice ispMACH 4000ze Features  
Figure 5-17 Lattice Development Kits  
Figure 5-18 Lattice Worldwide Sales, Engineering, and Headquarters Presence  
Figure 5-19 Lattice Worldwide Manufacturing Partner Presence  
Figure 5-20 Lattice Worldwide Sales and Distribution Partners  
Figure 5-21 Lattice Mid Range Strategy  
Figure 5-22 Lattice Low Density Strategy  
Figure 5-23 Lattice Mid Range and Low Density Programmable Digital Segment Strategy  
Figure 5-24 Lattice Quarterly Revenue  
Figure 5-25 Lattice New Product Quarterly Revenue  
Figure 5-26 Lattice 2Q 2010 Quarterly Revenue  
Figure 5-27 Xilinx Range of Markets  
Figure 5-28 Xilinx Customer Base  
Figure 5-29 Xilinx CT Scan Value Provided  
Table 5-30 Xilinx End Markets, Sub-Segments, and Applications  
Table 5-30 (Continued) Xilinx End Markets, Sub-Segments, and Applications  
Table 5-31 Xilinx Customer Applications  
Table 5-32 Xilinx Strategy Is For Expansion  
Table 5-33 Xilinx Strategic Positioning  
Figure 5-34 Xilinx Revenue  
Figure 5-35 Xilinx Historical Revenue, 1997-2010  
Figure 5-36 Xilinx Targeted Design Platforms

- Figure 5-37 Xilinx Revenue Performance at High End
- Figure 5-38 Xilinx Virtex Revenue Ramp-Up
- Figure 5-39 Xilinx Worldwide Sales Model
- Figure 5-40 Xilinx Next Generation Foundry Partners
- Figure 5-41 Xilinx Building on Virtex Leadership
- Figure 5-42 Virtex 5 Sales Exceed \$100M in FYQ3
- Figure 5-43 Xilinx Leadership in High Performance Transceivers

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