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Worldwide Crosspoint Switch Market Shares Strategies, and Forecasts, 2009-2015

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Abstracts

Crosspoint switches are poised to achieve significant growth as units become smaller, less expensive, and power conservation is achieved. Less expensive crosspoint switches allow proliferation of devices into a wide range of equipment applications. According to Susan Eustis, lead author of the study, “Economies of scale leverage the technology advances needed to make crosspoint switches competitive. Integration technology provided by crosspoint switches solves the issues poised by high speed network conflicting standards. Crosspoint switch price reductions are poised to drive market adoption by making multimedia technology affordable.”

The Internet and wireless communications dominate communications technology. Wireless web devices, Voice over Internet Protocol (VoIP), video-on-demand, third generation (3G) wireless services increase demand for higher speed, higher bandwidth communications systems. Remote network access has increased network bandwidth requirements and complexity. The continuing adoption of broadband technology is unrelenting.

E-mail, instant messaging, blogging, wikis, and e-commerce originally PC based, are being combined with the increasing availability of next-generation wireless devices. Features include internet browsing, cameras and video recorders. These initiatives drive data traffic through the network infrastructure.

The different types of data transmitted at various speeds over the Internet require service providers and enterprises to invest in multi-service equipment. Broadband equipment is emerging that can securely and efficiently process and transport the varied types of network traffic, regardless of whether it is voice traffic or data traffic. To achieve the performance and functionality required by such systems, original equipment

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manufacturers (OEMs) utilize complex crosspoint switch ICs to address both the cost and functionality of a system.

As a result of the pace of new product introductions in response to the changing market conditions in the telecommunications environments, there is a proliferation of standards. Crosspoint switches are designed to accommodate cost reductions involved in implementing new systems. Difficulty of designing and producing required ICs has stimulated the market for crosspoint switches. A position has evolved for the semiconductor companies. Equipment suppliers have increasingly outsourced IC design and manufacture to semiconductor firms with specialized expertise.

These trends have created a significant opportunity for IC suppliers that can design cost-effective solutions for the processing and transport of data. OEMs require IC suppliers that possess system-level expertise and can quickly bring to market highperformance, highly reliable, power-efficient ICs.

Demand for high bandwidth, high speed video and multimedia applications create demand for cross point switches. The weakening global economy is a concern to vendors participating in the crosspoint switch market. Previous revenue targets are being revised downward. Some market segments like security and video are anticipated to remain strong even in the global downturn. Some of the market segments will shrink from 2008 levels before picking up again. The automotive market appears to be particularly vulnerable. Carrier spending is likely to be cut back during the economic downturn.

Many semiconductor companies have cut back their expected revenue outlook. Texas Instruments is illustrative of the effect of the financial market thrashing. DALLAS (Dec. 8, 2008) – In a scheduled update to its business outlook for the fourth quarter of 2008, Texas Instruments Incorporated (TI) (NYSE: TXN) today lowered its expected ranges for revenue and earnings per share (EPS). The company currently expects its financial results to fall within the following ranges: * Revenue: $2.30 – 2.50 billion, compared with the prior range of $2.83 – 3.07 billion.

December 18, 2008 – LSI Corporation (NYSE: LSI) business outlook for the fourth quarter ending projects revenues of $570 to $610 million. The previous business outlook, which was announced on October 22, 2008, projected revenues in the range of $670 million to $710 million. The revised LSI outlook reflects anticipated sales levels that are lower than previously expected due to the weakening global macroeconomic environment. LSI has already begun taking steps to reduce operating expenses as a

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result of continuing demand uncertainty and expects to maintain tight expense controls for the foreseeable future.

Markets for crosspoint switches at $554 million in 2008 are anticipated to reach $2.98 billion by 2015, growing in response to decreases in unit costs and increases in integrated IC functionality. Some applications are relatively recession proof, including security and high speed video applications. Crosspoint switches are poised to make people more productive in security environments, help increase productivity with faster desktop access capabilities, and increase storage seek times.

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Conexant
Fairchild Semiconductor
Intersil
LSI
Maxim
Exar
Micrel
TranSwitch / Centillium Communications

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