

RESEARCH BULLETIN

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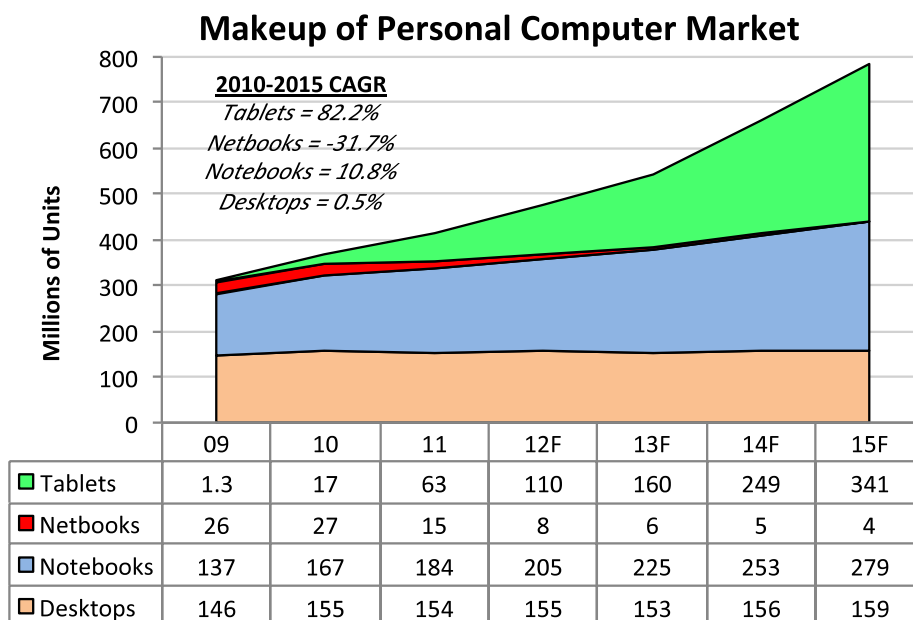
IC Insights Raises Forecast for Tablets, Notebooks, Total PC Shipments *Forecast reinforces strength of tablets and solid potential for Ultrabook initiative.*

IC Insights has raised its forecast for total shipments of personal computers and now expects total PC shipments to rise to 478 million units in 2012, an increase of 15% over 416 million units in 2011. According to the company's *Mid-Year Update* to its *2012 IC Market Drivers Report*, IC Insights forecasts total PC shipments will increase to 783 million units in 2015, which represents an average annual increase of 16% between 2010 and 2015.

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A breakdown of annual PC unit shipments by system type based on IC Insights' newly updated forecast is shown in Figure 1. New design concepts such as hybrid touch-screen/keyboard systems as well as growing use of tablet computers by businesses will significantly boost shipments of tablet and notebook PCs in 2012 and through the forecast period. Shipments of tablet PCs are now forecast to rise 75% to 110 million units in 2012 and notebook shipments are forecast to increase 11% to 205 million units.



Source: IC Insights

Figure 1

It is important to note that personal computer categories are beginning to blur as a result of Intel's Ultrabook campaign, Microsoft's new support for tablets in Windows 8, and the ongoing efforts to differentiate systems from Apple's iPad products. New hybrid portable PC designs supported in Intel's Ultrabook roadmap will attempt to merge the best features of tablets and notebooks.

Total portable computer shipments (i.e., full-feature notebooks, less-powerful netbooks, and touch-screen tablets) are forecast to represent 80% of worldwide units sold in 2015 compared to 68% forecast in 2012 and 63% in 2011. Portable computers exceeded the shipments of desktop PCs for the first time in 2009, and since then, the gap between stationary and mobile systems has been growing wider. The introduction of touch-screen tablets has accelerated this trend.

IC Insights' refreshed outlook for PC integrated circuit sales raises the projected dollar volume for ICs in 2012 due to higher system shipments. PC integrated circuit sales are now expected to grow 3% in 2012 to \$78.6 billion compared to \$76.6 billion in 2011, which was a 2% decline from \$78.5 billion in 2010.

Report Details:

Additional details and a revised forecast for the PC, automotive, cellphone, wireless networking, and digital television markets can be found in IC Insights' *Mid-Year Update to its 2012 IC Market Drivers Report—A Study of Emerging and Major End-Use Applications Fueling Demand for Integrated Circuits*. The report examines many of the leading system applications for ICs and evaluates the potential growth for new applications that are expected to fuel the market for ICs through 2015. Price: \$3,090 for individual user; \$6,190 for multi-user corporate license.

To review additional information about IC Insights' market research products and services please visit our web site: www.icinsights.com

About IC Insights

IC Insights, Inc., based in Scottsdale, Arizona USA, is dedicated to providing high-quality, cost-effective market research for the semiconductor industry. Founded in 1997, IC Insights offers coverage of global economic trends, the semiconductor market forecast, capital spending and fab capacity trends, product market details, and technology trends, as well as complete IC company profiles and evaluations of end-use applications driving demand for ICs.

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