

Worldwide PMP/MP3 Player Shipments Plateau as Market Succumbs to Competition From Emerging Connected Device Segments

SKU: IN0904511ID

Analyst: Stephanie Ethier

stephanie.ethier@reedbusiness.com

+1.781.879.3282

August 2009

Report Summary

Not so long ago, the PMP/MP3 player market was one of the fastest-growing segments in the portable consumer electronic (CE) industry, with Apple as the runaway leader with its successful iPod lineup. Today, the market is facing a serious slowdown as Apple shifts its focus to its illustrious iPhone, and as iPhone-like competitors pop up.

PMP/MP3 player shipments will reach 225 million worldwide by the end of 2009, up only 5% from 2008. Manufacturers are scrambling to encourage sales by adding enhanced features, like touchscreens and support for Wi-Fi.

Nevertheless, the PMP/MP3 player market has reached saturation due to waning consumer demand, a poor economic environment, and competition from emerging Internet-connected CE segments, such as audio/video-capable smartphones and mobile Internet devices (MIDs).

In-Stat's latest research on the global PMP/MP3 player market includes forecasts for unit shipments and revenues out to 2013. Regional splits for unit shipments, as well as expectations for growth in Wi-Fi-enabled PMPs, are included. New to this research is a bill-of-materials analysis and the total silicon revenue opportunity for suppliers to the global PMP market.

HIGHLIGHTS

- PMP/MP3 player shipments will grow only 5% between 2008 and 2009, signifying the start of market maturity.
- By 2013, 28% of global PMP/MP3 player shipments will be Wi-Fi-enabled.
- The total semiconductor opportunity for PMP/MP3 player suppliers will decline to approximately \$5 billion in 2013.

For more information or to purchase, see the [report online](#) or call 1.480.483.4441.

Table of Contents

Executive Summary.....	1
Introduction.....	4
PMP Manufacturers.....	5
Apple.....	5
Archos.....	5
Creative Technology.....	6
iRiver.....	7
ZVUE Corporation (Formerly HandHeld Entertainment).....	7
Microsoft.....	8
SanDisk.....	8
Samsung.....	10
Toshiba.....	10
PMP Suppliers.....	11
Actions Semiconductor.....	11
NVIDIA.....	11
Texas Instruments.....	12
Toshiba Semiconductor.....	12
Freescale Semiconductor (SigmaTel).....	13
Forecasts.....	14
Worldwide Unit Shipments.....	14
Regional Breakout.....	15
Wireless Capability in PMPs.....	16
Worldwide Revenue.....	17
Bill of Materials.....	18
Silicon and Non-Silicon Total Available Market (TAM).....	18
Methodology.....	21
List of Tables.....	22
List of Figures.....	22
Related In-Stat Reports.....	23

List of Tables

Table 1. Worldwide Unit Shipments for MP3 Players and PMPs, 2005 to 2013 (Units in Millions)..... 14

Table 2. Worldwide Unit Shipments for MP3 Players and PMPs, Audio-Only vs. Video-Capable, 2005 to 2013 (Units in Millions)..... 15

Table 3. Worldwide Unit Shipments for Flash-Based PMPs vs. HDD-Based PMPs, 2005 to 2013 (Units in Millions) 15

Table 4. Regional Distribution of Worldwide Unit Shipments for MP3 Players and PMPs, 2005 to 2013 (Units in Millions) 16

Table 5. Worldwide Shipments for Wi-Fi-Enabled PMPs, 2005 to 2013 (Units in Millions)..... 16

Table 6. Worldwide Revenue for PMPs, 2005 to 2013 (US\$ in Millions)..... 17

Table 7. Bill of Materials for an 8GB Flash-Based, Video-Capable PMP, 2009 to 2013..... 18

Table 8. Worldwide Total Silicon Available Market for All PMP/MP3 Players, by Component, 2009 to 2013 (US\$ in Millions) 19

Table 9. Worldwide Total Non-Silicon Available Market for All PMP/MP3 Players, by Component, 2009 to 2013 (US\$ in Millions) 19

Table 10. Summary of Worldwide Total Silicon and Non-Silicon Available Market for all PMP/MP3 Players, by Component, 2009 to 2013 (US\$ in Millions) 20

[Return to Table of Contents](#)

List of Figures

Figure 1. Worldwide PMP/MP3 Player Shipments, 2006 to 2013 (Units in Millions) 2

Figure 2. iPod Touch 5

Figure 3. Archos 2 6

Figure 4. Creative Zen X-Fi 7

Figure 5. Block Diagram of Nvidia’s Tegra..... 12

Figure 6. Block Diagram of Freescale’s i.MX37 13

[Return to Table of Contents](#)

ORDER FORM



Report Title: _____

SKU: _____

Price: _____

Customer Name: _____

Business Title: _____

Company: _____

Address: _____

City: _____

State: _____

Zip: _____

Country: _____

Email Address: _____

Phone: _____

Fax: _____

Cell: _____

Payment Method: Check Enclosed Check Number: _____

Please Bill Me – PO Attached PO Number: _____

Credit Card Type: _____

Card Number: _____

Exp Date: _____

Credit Card Information: Same As Above

Name: _____

Address: _____

City: _____

State: _____

Zip: _____

Signature: _____

Please print the order form and fax to: 303-265-2181

Additional Contacts | epotter@reedbusiness.com | chris.murray@reedbusiness.com | 480-483-4440