

PC Graphics Chip Sets--Competitive Analysis

MARKET SHARE ANALYSIS

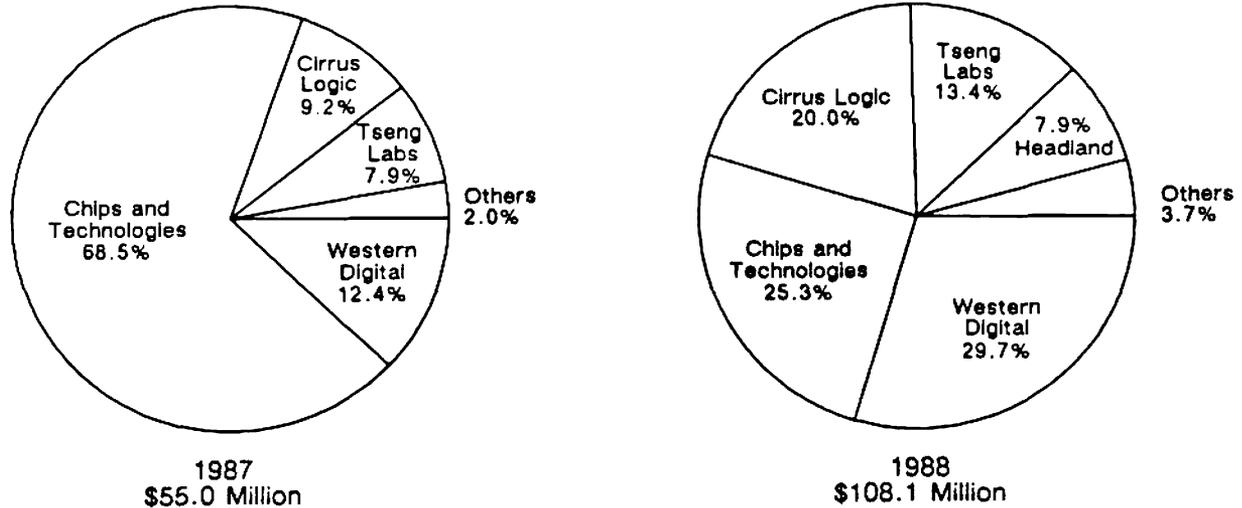
The market share data figures and tables for merchant PC graphics chip set vendors for 1987 and 1988 are organized as follows:

- Figure 1 Estimated Low-End PC Graphics Merchant Chip Set Revenue Market Share by Manufacturer
- Table 1 Estimated Low-End PC Graphics Merchant Chip Set Revenue Market Share and Rank (Millions of Dollars)
- Figure 2 Estimated Low-End PC Graphics Merchant Chip Set Unit Market Share by Manufacturer
- Table 2 Estimated Low-End PC Graphics Merchant Chip Set Unit Market Share and Rank (Millions of Units)
- Figure 3 Estimated Merchant CGA Chip Set Unit Market Share by Manufacturer
- Figure 4 Estimated Merchant EGA Chip Set Unit Market Share by Manufacturer
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- Table 3 Estimated Low-End PC Graphics Chip Set Unit Market Share by Graphics Standard Type (Thousands of Units)

PC Graphics Chip Sets--Competitive Analysis

Figure 1

**Estimated Low-End PC Graphics Merchant Chip Set
Revenue Market Share by Manufacturer**



0005191-1

Source: Dataquest
November 1989

Table 1

**Estimated Low-End PC Graphics Merchant Chip Set
Revenue Market Share and Rank
(Millions of Dollars)**

<u>Rank</u>		<u>Vendor</u>	<u>1988</u>		<u>1987</u>	
<u>1988</u>	<u>1987</u>		<u>Share</u>	<u>Revenue</u>	<u>Share</u>	<u>Revenue</u>
1	2	Western Digital	29.7%	32.1	12.4%	6.8
2	1	Chips and Technologies	25.3	27.3	68.5	37.7
3	3	Cirrus Logic	20.0	21.6	9.2	5.1
4	4	Tseng Labs	13.4	14.5	7.9	4.3
5	N/A	Headland Technology	7.9	8.5	N/A	N/A
		Other	3.7	4.0	2.0	1.1
Total			100.0%	\$108.1	100.0%	\$55.0

N/A = Not Applicable

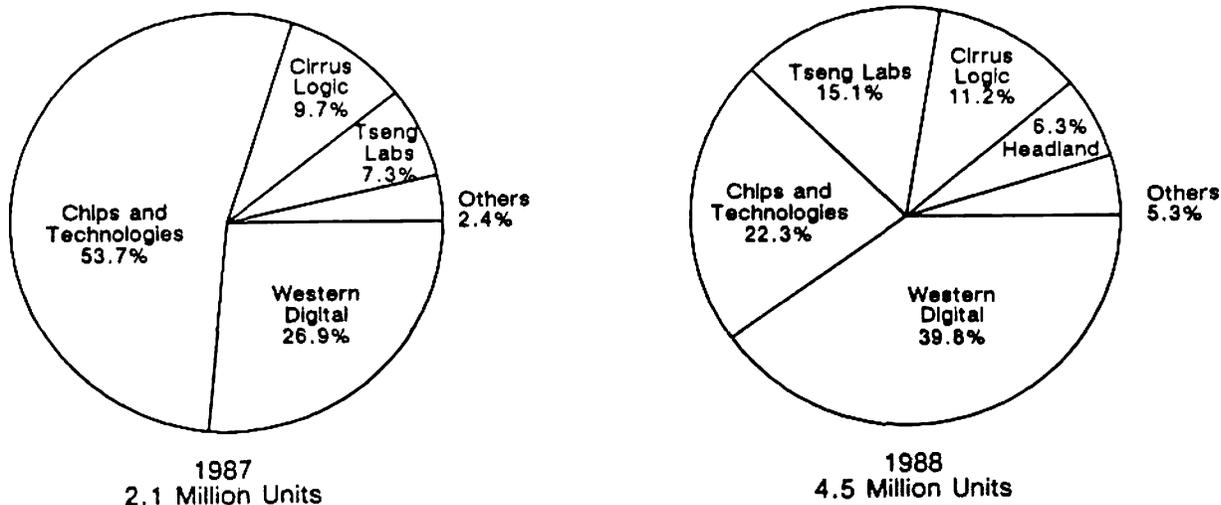
Note: Some columns may not add to totals shown because of rounding.

Source: Dataquest
November 1989

PC Graphics Chip Sets--Competitive Analysis

Figure 2

**Estimated Low-End PC Graphics Merchant Chip Set
Unit Market Share by Manufacturer**



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Source: Dataquest
November 1989

Table 2

**Estimated Low-End PC Graphics Merchant Chip Set
Unit Market Share and Rank
(Millions of Units)**

<u>Rank</u>		<u>Vendor</u>	<u>1988</u>	<u>1987</u>
<u>1988</u>	<u>1987</u>		<u>Share</u>	<u>Share</u>
1	2	Western Digital	39.8%	26.9%
2	1	Chips and Technologies	22.3	53.7
3	3	Tseng Labs	15.1	9.7
4	4	Cirrus Logic	11.2	7.3
5	N/A	Headland Technology	6.3	N/A
		Other	<u>5.3</u>	<u>2.4</u>
		Total	100.0%	100.0%
		Total Units	4.5	2.1

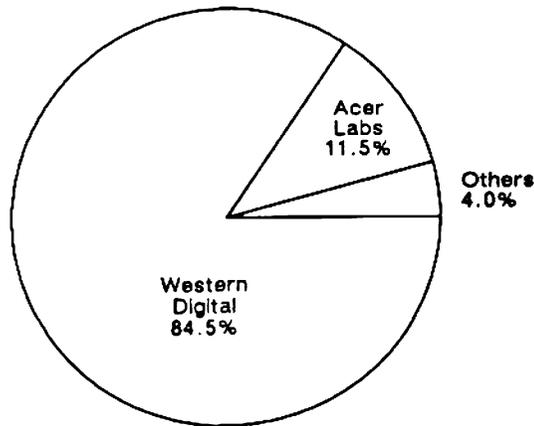
N/A = Not Applicable

Source: Dataquest
November 1989

PC Graphics Chip Sets--Competitive Analysis

Figure 3

Estimated Merchant CGA Chip Set
Unit Market Share by Manufacturer



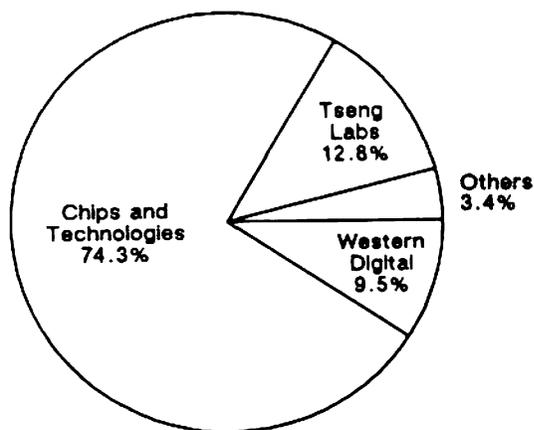
1988
767,000 Units

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Source: Dataquest
November 1989

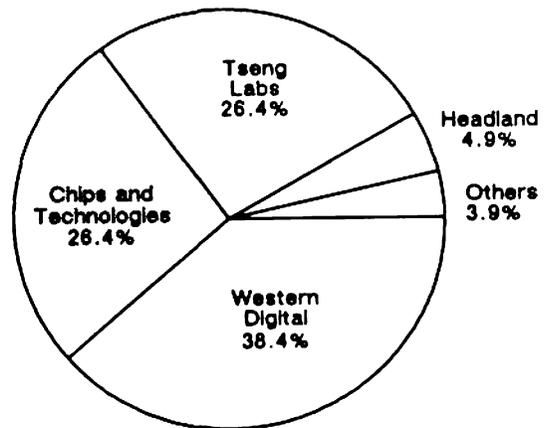
Figure 4

Estimated Merchant EGA Chip Set
Unit Market Share by Manufacturer



1987
1.2 Million Units

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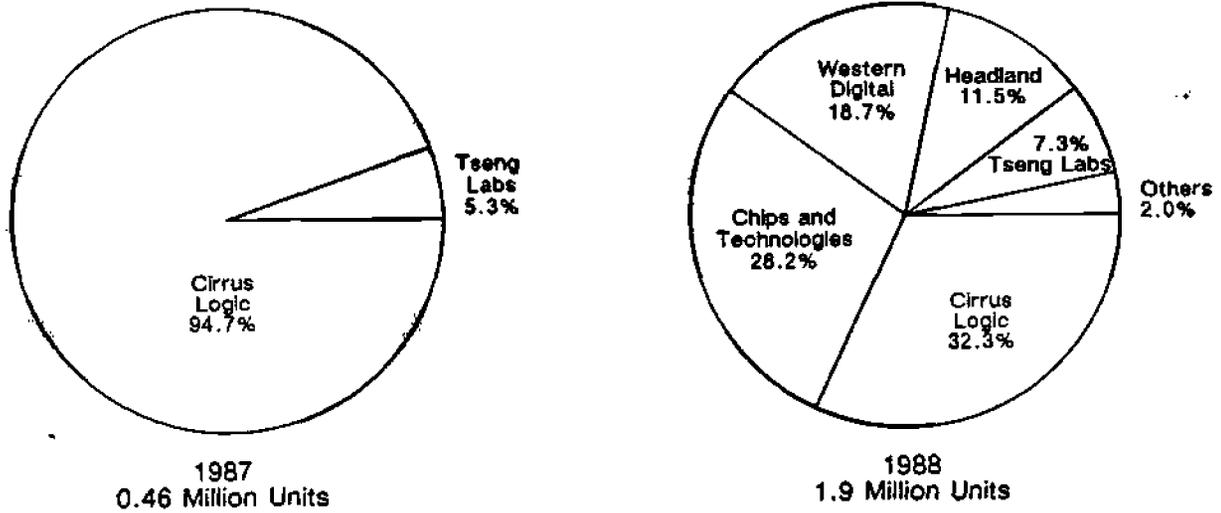
1988
1.8 Million Units

Source: Dataquest
November 1989

PC Graphics Chip Sets--Competitive Analysis

Figure 5

Estimated Merchant VGA Chip Set
Unit Market Share by Manufacturer



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Source: Dataquest
November 1989

PC Graphics Chip Sets--Competitive Analysis

Table 3

Estimated Low-End PC Graphics Chip Set
Unit Market Share by Graphics Standard Type
(Thousands of Units)

<u>Standard</u>	<u>Rank</u>		<u>Vendor</u>	1988	1987
	<u>1988</u>	<u>1987</u>		<u>Share</u>	<u>Share</u>
CGA	1	1	Western Digital	84.5%	100.0%
	2	2	Acer Laboratories	11.5	N/A
			Other	<u>4.0</u>	<u>N/A</u>
			Total	100.0%	100.0%
		Total Units	767.0	405.0	
EGA	1	3	Western Digital	38.4%	9.5%
	2	1	Chips and Technologies	26.4	74.3
	2	2	Tseng Labs	26.4	12.8
	3	N/A	Headland Technology	4.9	N/A
			Other	<u>3.9</u>	<u>3.4</u>
		Total	100.0%	100.0%	
		Total Units	1,812.0	1,242.0	
VGA	1	1	Cirrus Logic	32.3%	94.7%
	2	N/A	Chips and Technologies	28.2	N/A
	3	N/A	Western Digital	18.7	N/A
	4	N/A	Headland Technology	11.5	N/A
	5	2	Tseng Labs	7.3	5.3
			Other	<u>2.0</u>	<u>N/A</u>
		Total	100.0%	100.0%	
		Total Units	1,946.0	460.0	

N/A = Not Applicable

Source: Dataquest
November 1989