CHALLENGES AND OPPORTUNITIES FOR RISC V

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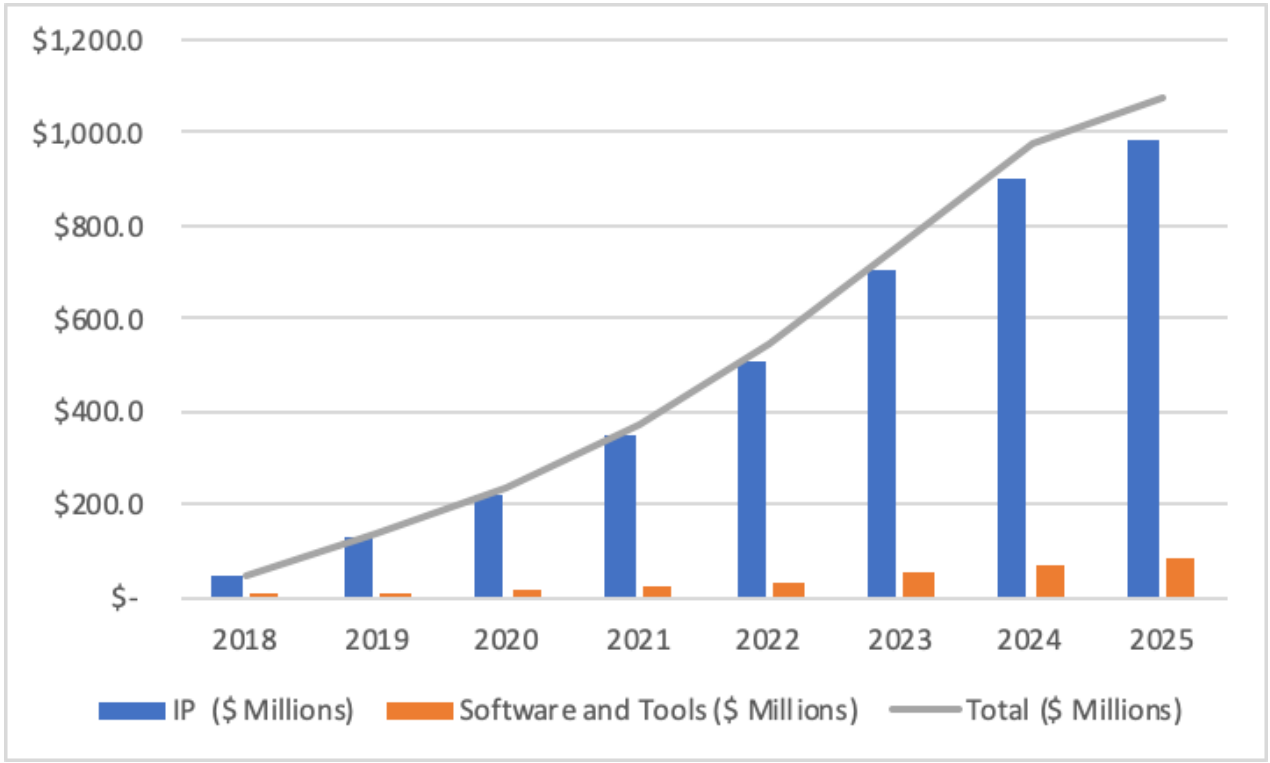
Market for RISC V is growing rapidly!



Total market for RISC V IP and Software is expected to reach $1.07 billion by 2025 at a CAGR of 54.1%

Source: Tractica

Key drivers

- Open Source and generous licensing terms
- Evolving algorithms and applications
- Increased need for processors per SoC
- Need to differentiate
- Support from key industry players

Key challenges

- The ARM wall
  - RISC V as a secondary processor
- Ecosystem
- Switching costs
- Availability of expertise

Who is buying

Vertical	Volume	Comments
Storage	Medium	Storage is being driven by Western Digital, which plans to incorporate RISC-V in each of its chipsets.
Communications	Medium	RISC-V tends to be attractive for areas that are emerging and evolving and is seeing traction in 5G, which is also evolving.
Computers	Medium	NVIDIA is already shipping RISC-V in a graphics processing unit (GPU) SoCs.
AI	High	Due to its extendibility and low power, RISC-V is being used on the edge by many startups and enterprises.
Internet of Things (IoT)	High	The most prominent player shipping in this market is Huami (Xiaomi's brand name for wearables).
Other	Unknown	There are many other markets, such as automotive, where RISC-V is being used, but no clear trends have emerged just yet.

Road forward

- RISC V as a secondary processor
  - Rapid volume increase 2020 onwards (82% CAGR vs 52%)
- Market growth depends on consumer's willingness to pay
  - Linux like business model
  - Average licensing and royalty
- Exciting times ahead
  - IP market dynamics
  - Ecosystem, standardization and corporate support will be crucial

Questions and answers

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