RESEARCH BULLETIN

IC Insights

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Top-15 Semi Companies Log Year-Over-Year Growth of 21% in 1Q21

Excluding Intel, the group would have shown a 29% jump in 1Q21/1Q20 sales.

IC Insights released its *May Update* to the 2021 *McClean Report* last week. This *Update* included a discussion of the 1Q21 IC industry market results, an updated quarterly forecast for the remainder of this year, and a look at the top-25 1Q21 semiconductor suppliers. The top-15 1Q21 semiconductor suppliers are covered in this research bulletin.

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The top-15 worldwide semiconductor (IC and O-S-D—optoelectronic, sensor, and discrete) sales ranking for 1Q21 is shown in Figure 1. It includes eight suppliers headquartered in the U.S., two each in South Korea, Taiwan and Europe, and one in Japan. The ranking includes six fabless companies (Qualcomm, Broadcom, Nvidia, MediaTek, AMD, and Apple) and one pure-play foundry (TSMC).

1Q21 Top 15 Semiconductor Sales Leaders ($M, Including Foundries)

1Q21 Rank	1Q20 Rank	Company	Headquarters	1Q20 Total IC	1Q20 Total O-S-D	1Q20 Total Semi	1Q21 Total IC	1Q21 Total O-S-D	1Q21 Total Semi	1Q21/1Q20 % Change
1	1	Intel	U.S.	19,508	0	19,508	18,676	0	18,676	-4%
2	2	Samsung	South Korea	14,030	767	14,797	16,152	920	17,072	15%
3	3	TSMC (1)	Taiwan	10,319	0	10,319	12,911	0	12,911	25%
4	4	SK Hynix	South Korea	5,829	210	6,039	7,323	305	7,628	26%
5	5	Micron	U.S.	5,004	0	5,004	6,580	0	6,580	31%
6	7	Qualcomm (2)	U.S.	4,050	0	4,050	6,281	0	6,281	55%
7	6	Broadcom Inc. (2)	U.S.	3,673	409	4,082	4,355	485	4,840	19%
8	9	Nvidia (2)	U.S.	3,074	0	3,074	4,630	0	4,630	51%
9	8	TI	U.S.	2,974	190	3,164	3,793	235	4,028	27%
10	16	MediaTek (2)	Taiwan	2,022	0	2,022	3,849	0	3,849	90%
11	18	AMD (2)	U.S.	1,786	0	1,786	3,445	0	3,445	93%
12	11	Infineon	Europe	1,828	876	2,704	2,170	1,083	3,253	20%
13	10	Apple* (2)	U.S.	2,770	0	2,770	3,080	0	3,080	11%
14	14	ST	Europe	1,483	745	2,228	2,011	994	3,005	35%
15	13	Kioxia	Japan	2,567	0	2,567	2,585	0	2,585	1%
—	—	Top-15 Total		80,917	3,197	84,114	97,841	4,022	101,863	21%

(1) Foundry (2) Fabless

Source: Company reports, IC Insights' *Strategic Reviews* database *Custom processors/devices for internal use.

Figure 1

If pure-play foundry TSMC was excluded from the ranking, Europe-based IDM NXP ($2,503 million in sales) would have been ranked 15th in the 1Q21 listing. In total, the top-15 semiconductor companies' sales surged by 21% in 1Q21 compared to 1Q20, three points greater than the total worldwide semiconductor industry 1Q21/1Q20 increase of 18%. Fourteen of the top-15 companies had semiconductor sales of at least $3.0 billion in 1Q21. As shown, it took almost $2.6 billion in quarterly sales to make it into the 1Q21 top-15 semiconductor supplier list.

There were two new entrants into the top-15 ranking in 1Q21—MediaTek and AMD. MediaTek and AMD replaced HiSilicon and Sony in the top-15 listing. HiSilicon, which was ranked 12th in the top-15 sales ranking in 1Q20, is the semiconductor design division of China-based telecommunications giant Huawei with over 90% of the company's sales going to its parent company. However, U.S. sanctions on Huawei/HiSilicon terminated the ability of HiSilicon to purchase ICs from its primary foundry TSMC beginning in 4Q20.

AMD's year-over-year sales surged 93% in 1Q21, the highest growth rate of any of the top-15 companies, to move up seven spots in the ranking and into 11th place. Moreover, the company expects its full-year 2021 sales to increase about 50%.   MediaTek also posted an incredible year-over-year sales increase of 90% in 1Q21 and jumped up six positions into 10th place. Interestingly, the four highest year-over-year growth rates registered in 1Q21 were from fabless suppliers (AMD, MediaTek, Qualcomm, and Nvidia), each greater than 50%.

Thirteen of the top-15 semiconductor companies registered a double-digit year-over-year sales increase in 1Q21 while only one company—Intel—displayed a decline. ***Illustrating Intel's "drag" on the total growth rate of the top-15 semiconductor companies, the remaining 14 suppliers in the ranking registered a combined 1Q21/1Q20 sales jump of 29%, eight points higher than when Intel is included.***

IC Insights includes foundries in the top-15 semiconductor supplier ranking since it has always viewed the ranking as a top supplier list, not a marketshare ranking, and realizes that in some cases the semiconductor sales are double counted. With many of our clients being vendors to the semiconductor industry (supplying equipment, chemicals, gases, etc.), excluding large IC manufacturers like the foundries would leave significant "holes" in the list of top semiconductor suppliers. As shown in the listing, the foundries and fabless companies are identified. In the *April Update* to *The McClean Report*, marketshare rankings of IC suppliers by product type were presented and foundries were excluded from these listings.

Overall, the top-15 list is provided as a guideline to identify which companies are the leading semiconductor suppliers, whether they are IDMs, fabless companies, or foundries.

Report Details: The *2021 McClean Report*

The 2021 edition of *The McClean Report—A Complete Analysis and Forecast of the Integrated Circuit Industry* was released in January 2021. A subscription to *The McClean Report* includes **free** monthly updates from March through November (including a 180+ page *Mid-Year Update*), and **free** access to subscriber-only pre-recorded webcasts through November. An individual user license to the 2021 edition of *The McClean Report* is available for $5,390 and a multi-user worldwide corporate license is available for $8,590. The Internet access password and the information accessible to download will be available through November 2021.

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