

**JULY 12, 2007**

## **Asia-Pacific IC Suppliers Marketshare to Reach 32% in 2011**

*Japanese suppliers share to shrink to only 14%.*

Figure 1 shows the ebb and flow of worldwide IC sales (including foundry sales) by company headquarters location from 1982 through 2006 and a forecast for 2011. As shown, in 2006, IC companies headquartered in the Americas region held almost half of the worldwide IC sales marketshare, about the same share as 21 years earlier in 1985.

After reaching a high of 51% in 1988, the Japanese IC suppliers have displayed a steady decline in marketshare. In fact, in 2006, the Japan-headquartered companies' share dropped to only 17% of the IC market. Even with the success of Toshiba in flash memory, IC Insights believes that the Japanese companies in total will continue to lose IC marketshare over the next five years (to a 14% share in 2011).

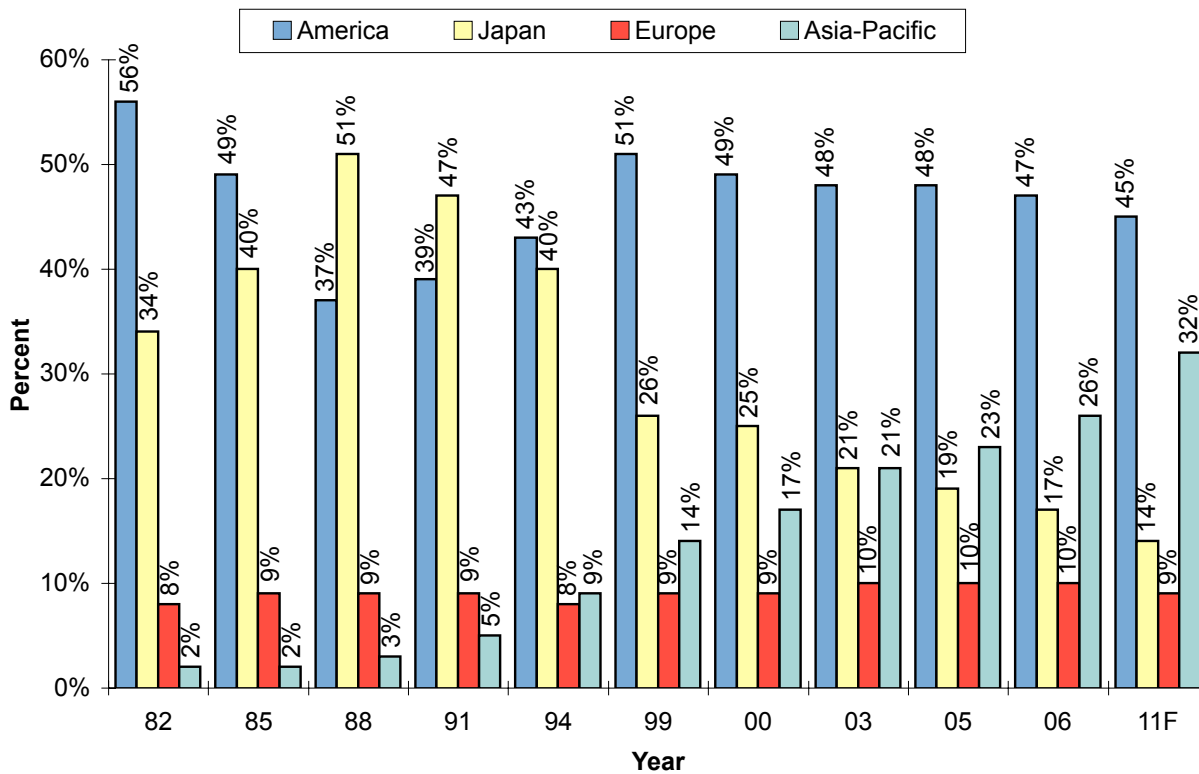
It is amazing how consistent the IC industry marketshare of the European companies has been over the past 24 years. As shown, since 1982, the European companies have always held 8-10% of the worldwide IC market. IC Insights believes that the European companies will stay in this narrow range through 2011.

The Asia-Pacific IC supplier segment is primarily composed of Taiwanese, South Korean, and Chinese companies. As was shown, the Asia-Pacific companies have grown from holding only 2% of the IC market in 1985 to 26% in 2006. In fact, the Asia-Pacific companies' IC marketshare in 2006 was almost equal to the combined shares of the Japanese and European companies. Because of the large growth forecast for the foundry industry, a segment in which many Asia-Pacific companies are heavily involved, IC Insights believes that the Asia-Pacific companies will continue to gain marketshare and represent almost one-third (32%) of worldwide IC sales in 2011.

### **MORE INFORMATION CONTACT**

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## Worldwide IC Sales by Company Headquarters Location



**Figure 1**

### Report Details

The June/July Mid-Year update to IC Insights' 2007 *McClean Report—A Complete Analysis and Forecast of the Integrated Circuit Industry*, will be release in July. *The McClean Report* service is available in three-ring binder, CD-ROM, and on-line formats, and also comes with free monthly updates by e-mail from March through November. A single copy of the report in CD-ROM or binder format is priced at \$2,590. A bundled CD-binder set is priced at \$3,085. An Internet access password is available as a \$695 option. The report is also available under a multi-user corporate license for \$5,490.

#### 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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