

2010  
Edition

# INTEGRATED CIRCUIT Market Drivers

## A Study of Emerging and Major End-Use Applications Fueling Demand for Integrated Circuits

### ■ Recovery set for global economy and electronic system sales

Riding on a strengthening economy, the IC market is forecast to enjoy double-digit growth for several years. Find out which IC product categories will benefit most.

### ■ Packed with data

Numerous tables provide over 5,000 market data points categorized by IC device type, by electronic system type, and by geographic region

### ■ Historical and forecast market statistics

Annual market data is presented for the 2007-2013 timeperiod

### ■ Analyses of systems driving the IC market

- PCs (incl. netbooks, ultra-portables, notebooks)
- Wireless networking (incl. Bluetooth, Wi-Fi/802.11, WiMAX)
- Cellular phones (incl. 3G, WCDMA, mobile TV, smartphones)
- Automotive electronics (incl. hybrid and electric vehicles)
- Video game consoles (incl. Wii, PS3, Xbox 360)
- Digital cameras and digital audio players
- Digital TVs, set-top boxes, Blu-ray DVD, and digital video delivery
- GPS, RFID, and smartcards
- Overview of promising new applications

### DID YOU KNOW?

- The communications IC market in the Asia-Pacific region is *more than four times* the size of that in the Americas region.
- The Asia-Pacific region holds 86% of the computer analog market.
- Computer applications are forecast to have the largest share of the flash memory market until 2013.
- The automotive IC market is forecast to be 60% greater in 2013 as compared to 2009.

Find answers like these in *IC Market Drivers*

# Identify Opportunities for Growth in the Recovering Economy

The IC market remains closely linked to the health of the electronic systems market. As global economies begin a period of recovery, demand for electronic systems will increase with an expanding number of end-use applications providing the stimulus for IC growth. *IC Market Drivers—A Study of Emerging and Major End-Use Applications Fueling Demand for Integrated Circuits*—helps identify opportunities for growth and evaluates the potential for new applications that are expected to fuel the market for integrated circuits through 2013.

*IC Market Drivers* is divided into two parts. The first provides an extensive database of historical and future IC market statistics categorized by end-use application. The second examines key electronic system applications that are expected to drive IC demand in the coming years.

## PART I: IC End-Use Application Database

### Use this section to discover...

...Specific IC products that have the highest market potential...

...The types of electronic systems in which they are typically found...

...And, the geographic locations where they are most commonly sold.



### Example Data Types:

- Communications MOS Logic IC market by geographic region.
- Computer IC market by device type.
- IC value as a percent of electronic system sales.
- Analog IC usage by electronic system type in Japan.
- Consumer vs. communications analog IC demand.
- MOS Memory market by device type.
- European IC usage by system type.
- Forecast for Asia-Pacific DSP market.

In **Part I**, IC Insights presents an extensive 2007-2013 IC end-use application database. Data is arranged in several ways—by electronic system type (computer, communications, consumer, automotive, industrial, and government/military), by device type (microcontrollers, memory, analog, logic, etc.), and by geographic region (Americas, Europe, Japan, and Asia-Pacific).

### Analog IC Usage Forecast by System Type

2007														
Region	Consumer		Auto		Computer		Industrial		Comm.		Gov/Mil		Total	
	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt
Americas	1.7%	\$645	3.6%	\$1,365	1.3%	\$493	2.9%	\$1,100	3.0%	\$1,138	0.6%	\$228	13.1%	\$4,968
Europe	1.9%	\$721	7.1%	\$2,693	0.9%	\$341	3.5%	\$1,327	4.7%	\$1,782	0.1%	\$38	18.2%	\$6,902
Japan	4.7%	\$1,782	2.9%	\$1,100	2.7%	\$872	2.3%	\$872	2.8%	\$1,062	0.1%	\$38	15.5%	\$5,878
Asia-Pac	13.8%	\$5,234	2.8%	\$1,062	11.1%	\$4,210	5.2%	\$1,972	20.1%	\$7,263	0.2%	\$76	53.2%	\$20,176
<b>Total</b>	<b>22.1%</b>	<b>\$8,381</b>	<b>16.4%</b>	<b>\$6,220</b>	<b>16.0%</b>	<b>\$6,068</b>	<b>13.9%</b>	<b>\$5,272</b>	<b>30.6%</b>	<b>\$11,605</b>	<b>1.0%</b>	<b>\$379</b>	<b>100.0%</b>	<b>\$37,925</b>

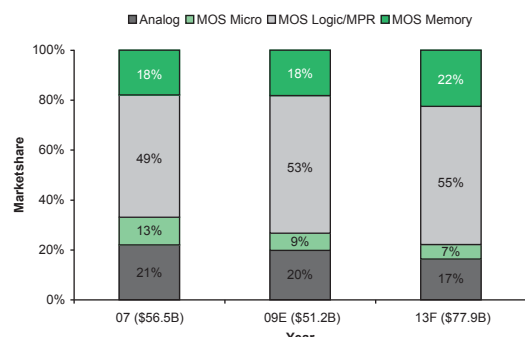
  

2008														
Region	Consumer		Auto		Computer		Industrial		Comm.		Gov/Mil		Total	
	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt
Americas	1.1%	\$408	2.0%	\$1,075	0.5%	\$185	4.2%	\$1,557	2.9%	\$1,075	0.8%	\$297	12.4%	\$4,968
Europe	1.5%	\$556	6.8%	\$2,521	0.4%	\$148	4.5%	\$1,688	3.7%	\$1,372	0.2%	\$74	17.1%	\$6,340
Japan	5.4%	\$2,002	3.0%	\$1,112	2.1%	\$779	2.8%	\$1,038	3.1%	\$1,149	0.0%	\$0	16.4%	\$6,081
Asia-Pac	14.1%	\$5,228	2.6%	\$964	13.5%	\$5,005	5.9%	\$2,188	17.9%	\$6,637	0.1%	\$37	54.1%	\$20,059
<b>Total</b>	<b>22.1%</b>	<b>\$8,194</b>	<b>15.3%</b>	<b>\$5,673</b>	<b>16.5%</b>	<b>\$6,118</b>	<b>17.4%</b>	<b>\$6,451</b>	<b>27.6%</b>	<b>\$10,233</b>	<b>1.1%</b>	<b>\$404</b>	<b>100.0%</b>	<b>\$37,077</b>

2009E		
Region	%	Mkt
Americas	1.0%	\$325
Europe	1.2%	\$390
Japan	4.2%	\$1,365
Asia-Pac	13.8%	\$4,484
<b>Total</b>	<b>20.2%</b>	<b>\$6,563</b>

### Communications IC Market by Device Type



# PART II: Analyses of End-Use Applications

## Use this section to learn...

...More about several end-use applications that are expected to drive demand for ICs in the coming years...

...The types of ICs that are built into electronic systems...

...Who are the leading manufacturers of systems and related ICs...

...And more.

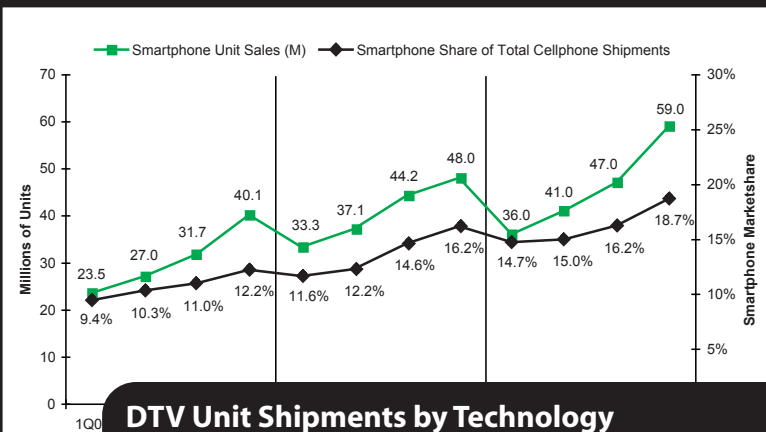


## Example Subjects:

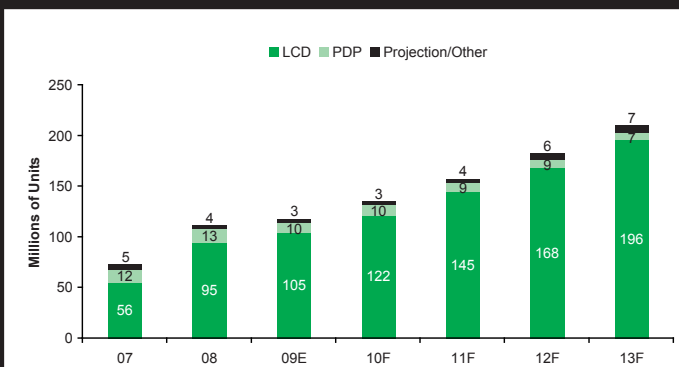
- **Automotive Electronics:** Emerging opportunities in telematics, satellite radio, sensor technology, hybrid vehicles, etc.
- **Cellular Phones:** Basestation market overview, subscriber forecast, leading handset suppliers, handset market by generation, IC content, TV phones, smartphones.
- **Digital Cameras:** CCD vs. CMOS image sensors, pixel resolution trends, digital camera market and unit forecast, ICs found inside.
- **Digital Video:** Includes outlook for Blu-ray DVD and Internet video.
- **Personal Computers:** Market and unit shipment analysis, IC market forecast, PC architecture trends, computer IC technologies.
- **Wireless Networks:** Local-area vs. personal-area networks, comparison of standards, leading system suppliers, hardware cost issues, IC market forecast.

**Part II** explores specific electronic systems that are expected to play prominent roles in the IC industry over the next several years. Included in the section are analyses of wireless networking, cellular phones, entertainment appliances such as video game consoles, digital TVs, and digital audio and video delivery systems, personal and portable computing systems, GPS, smartcards, RFID, and automotive electronics. Historical developments and future expectations that will make these markets attractive for IC vendors are highlighted and discussed.

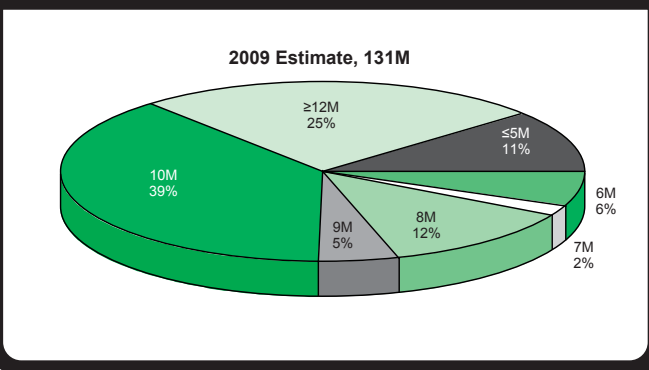
### Smartphone Marketshare Trends



### DTV Unit Shipments by Technology



### Digital Camera Shipments by Resolution



# MULTIPLE FORMATS TO SUIT YOUR NEEDS



## Get a Three-Ring Binder for ...

Quick access to an off-the-shelf reference.



## Get an Internet Access Password for ...

Greater accessibility—easy access to market data from any computer. A great solution for those times when you're traveling.

Documents are keyword searchable and include color graphs, tables, and illustrations.



## Get a CD-ROM for ...

Greater functionality—indexed Adobe PDF documents for keyword searching and color graphics files of graphs, tables, and illustrations for use in your presentations.



## Get a Multi-User Corporate License for ...

With a redistribution license, give any number of employees instant, unlimited access to the valuable data in *IC Market Drivers*.

## ORDER FORM – IC Market Drivers 2010

### 1 ORDER OPTIONS (choose one)

#### Individual Users

**Binder and CD-ROM**  \$2,985 x 1 = \$ \_\_\_\_\_

**Binder only**  \$2,490 x 1 = \$ \_\_\_\_\_

**CD-ROM only**  \$2,490 x 1 = \$ \_\_\_\_\_

**Optional Internet Access Password**  \$695 ea. x \_\_\_\_\_ = \$ \_\_\_\_\_  
(initial binder or CD purchase required)

#### Multiple Users

**Multi-User Corporate License**  \$5,890 x 1 = \$ \_\_\_\_\_

Includes redistribution license for company-wide use, CD, binder, and Internet access password.

#### Additional Copies (sent to same address)

Three-Ring Binder(s) \$495 ea. x \_\_\_\_\_ = \$ \_\_\_\_\_

CD-ROM(s) \$495 ea. x \_\_\_\_\_ = \$ \_\_\_\_\_

**TOTAL:** = \$ \_\_\_\_\_

### 2 PAYMENT METHOD (choose one)

**Credit Card**  American Express  MasterCard  Visa

Card # \_\_\_\_\_ Exp \_\_\_\_\_

Cardholder Name \_\_\_\_\_

Signature \_\_\_\_\_

Billing and shipping addresses the same?  Yes or  No  
If not, please provide billing address

**Company Check** Payable in U.S. dollars to IC Insights.

Order will ship upon receipt of check.

**Purchase Order** P.O. # \_\_\_\_\_

Please fax or attach copy of purchase order.

### 3 SHIPPING ADDRESS

Name \_\_\_\_\_

Title/Position \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Suite/Mail Stop \_\_\_\_\_

City \_\_\_\_\_

State/Prov \_\_\_\_\_

Zip/Postal Code \_\_\_\_\_

Country \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-Mail \_\_\_\_\_

**Is this the end-user?**  Yes or  No (N/A for multi-user license)

If not, please attach end-user contact information

### 4 SEND ORDER. THANK YOU!

**FAX:** +1-480-348-9745

**PHONE:** +1-480-348-1133

**MAIL:** IC Insights, Inc.  
13901 North 73rd Street, Suite 205  
Scottsdale, Arizona 85260 USA

**E-MAIL:** Send pertinent information to  
[order@icinsights.com](mailto:order@icinsights.com)

web

#### SATISFACTION GUARANTEED

Your satisfaction is important to us. If the subscription does not meet your needs, you may cancel it within 15 days for a full refund.

To learn more about other market research services and publications offered by IC Insights, visit our web site at [www.icinsights.com](http://www.icinsights.com)