

RESEARCH BULLETIN

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IC Insights Releases the New 2021 Edition of *The McClean Report*

IC market forecast to log its second year in a row of double-digit growth to set a new all-time high.

IC Insights is pleased to now offer its 2021 edition of *The McClean Report*. *The McClean Report* has become a staple of the IC industry, delivering timely, sound, and resourceful semiconductor market data and analysis since it was first published in 1997. This 24th edition of *The McClean Report* features more than 400 pages and over 375 charts and figures. A one-hour webcast covering some of the highlights of the new report is also now accessible for subscribers.

MORE INFORMATION CONTACT

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A comparison of several key *McClean Report* market metrics for 2020 and 2021 are shown below.

	2020	2021F
WW GDP (\$T)	83.6	87.6 (+4.8%)
Electronic System Sales (\$B)	1,650	1,780 (+8%)
IC Market (\$B)	395.7	441.5 (+12%)
IC Units (B)	318.1	350.2 (+10%)
IC ASP (\$)	1.24	1.26 (1%)
Semi Cap Expenditures (\$B)	109.1	125.0 (+15%)
Min. Process Geometry	5nm	3nm

Throughout its history, the IC industry has experienced amazing highs and endured gut-wrenching lows. Nothing, however, has quite matched the challenge presented in 2020 when the Covid-19 coronavirus pandemic swept around the world. The damaging impact on individuals as well as regional/global economies was evident early on. Yet, through it all, the total IC industry largely avoided the catastrophic sales decline seen in many other industries. Global IC sales *increased* 10% in 2020 fueled by demand for portable computers and powerful large-screen smartphones, which were used to access the Internet and cloud computing when the Covid-19 crisis was rapidly spreading. Investment in expansion of data-center computers also gave IC sales a boost.

Computing has long been the growth engine for the IC industry, but remarkable emerging applications in communication, consumer, automotive, and industrial/medical systems are fueling development of new complex, high-speed, and/or low-power ICs. Cloud computing, 5G technology, artificial intelligence, virtual reality, the Internet of Things, autonomous vehicles, robotics, and many other technologies are rapidly advancing and will change the way consumers live and businesses operate. IC Insights expects a strong, three-year wave of double-digit growth for the IC industry based on these emerging technologies.

After a decline of 4.4% in 2020, IC Insights expects 4.8% global GDP growth in 2021, its highest increase since 1976. Moreover, throughout the forecast period, IC Insights believes that annual worldwide IC market growth will continue to track closely with the performance of worldwide GDP.

Electronic system sales are forecast to rise 8% while the 2021 IC market is forecast to rise 12% and set a new all-time high sales level of \$441.5 billion, which would surpass the previous high mark of \$421.7 billion set in 2018. A big 15% surge in semiconductor industry capital spending is forecast for this year as TSMC and Samsung are moving to expand their respective 7nm and 5nm manufacturing capacity. TSMC also expects to ramp production of 3nm devices by the end of the year.

Report Details: *The 2021 McClean Report*

The 2021 edition of *The McClean Report—A Complete Analysis and Forecast of the Integrated Circuit Industry*, will be 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.

To review additional information about IC Insights' new and existing market research products and services please visit our website: www.icinsights.com

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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