

**SEPTEMBER 11, 2014**

## Asia-Pacific Dominates IC Sales in Largest System Categories in 2014

*Europe forecast to remain largest regional market for auto ICs, but Asia-Pacific gaining fast.*

Data presented in IC Insights *Update to the 2014 IC Market Drivers* report confirms Asia-Pacific's firm grip as the dominant market for IC sales—a continuation of what has been a long and ongoing trend. As shown, Asia-Pacific is forecast to account for nearly 59% of the \$285.9 billion IC market in 2014, followed by the Americas region, Europe, and Japan. The Asia-Pacific region is particularly dominant with regard to IC marketshare in the computer and communications categories, and to a lesser extent in the consumer and industrial categories. Globally, the communications segment first surpassed the computer segment to become the largest end-use market for ICs in 2013 and it is forecast to extend its marketshare lead to 1.1 points in 2014.

### MORE INFORMATION CONTACT

Bill McClean  
President  
Phone: +1-480-348-1133  
Email: bill@icinsights.com

Europe is forecast to account for the largest share of the automotive IC market in 2014, but with Asia-Pacific increasingly becoming the focus of new car sales, it is expected to gain top share of IC sales in this systems segment in 2016.

**2014F IC Usage by System Type (\$M)**

Region	Consumer		Auto		Computer		Industrial		Comm.		Gov/Mil		Total	
	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt	%	Mkt
Americas	2.9%	\$8,169	1.4%	\$4,138	7.3%	\$20,984	1.1%	\$3,163	8.2%	\$23,449	0.5%	\$1,436	21.5%	\$61,339
Europe	0.5%	\$1,547	2.6%	\$7,309	3.4%	\$9,711	1.5%	\$4,305	3.0%	\$8,635	0.1%	\$306	11.1%	\$31,813
Japan	1.5%	\$4,274	1.2%	\$3,366	2.8%	\$8,095	0.7%	\$2,047	2.4%	\$6,786	0.0%	\$0	8.6%	\$24,568
Asia-Pac	7.0%	\$19,869	2.3%	\$6,622	22.8%	\$65,225	2.7%	\$7,735	24.0%	\$68,470	0.1%	\$232	58.8%	\$168,153
<b>Total</b>	<b>11.8%</b>	<b>\$33,859</b>	<b>7.5%</b>	<b>\$21,435</b>	<b>36.4%</b>	<b>\$104,015</b>	<b>6.0%</b>	<b>\$17,249</b>	<b>37.5%</b>	<b>\$107,340</b>	<b>0.7%</b>	<b>\$1,975</b>	<b>100.0%</b>	<b>\$285,873</b>

Source: IC Insights' *IC Market Drivers 2014 Update*

**Figure 1**

IC Insights' *Update to the IC Market Drivers 2014* report forecasts total IC usage by system type through the year 2017. Highlights from forecast data include the following items.

- The two highest growth end-use markets for ICs are forecast to be automotive and communications, having 11.0% and 7.4% 2013-2017 CAGRs, respectively.
- After slumping to only \$10.6 billion in 2009, the automotive IC market is forecast to reach \$21.4 billion in 2014 and \$28.8 billion in 2017.
- The two largest end-use market segments—computer and communications—are forecast to hold 73.7% of the total IC market in 2017, about flat from the 73.9% share forecast in 2014.
- The Asia-Pacific region is forecast to gain IC marketshare over the next four years and reach 60.9% in 2017. In contrast, Europe and Japan are expected to continue to decline in share with the Japan region holding only 7.7% the total \$330.2 billion IC market in 2017.

### **Report Details: *IC Market Drivers 2014***

Additional details on IC sales by system type are provided in *IC Market Drivers 2014—A Study of Emerging and Major End-Use Applications Fueling Demand for Integrated Circuits*. *IC Market Drivers* examines the largest, existing system opportunities for ICs and evaluates the potential of new applications that are expected to help fuel the market for ICs.

*IC Market Drivers* is divided into two parts. Part 1 provides a detailed forecast of the IC industry by system type, by region, and by IC product type through 2017. In Part 2, the *IC Market Drivers* report examines and evaluates key existing and emerging end-use applications that will support and propel the IC industry through 2017. Some of these applications include the automotive market, cellular phones (including smartphones), personal/mobile computing (including tablets), wireless networks, digital imaging, and a review of many applications to watch—those that may potentially provide significant opportunity for IC suppliers later this decade. The *2014 IC Market Drivers* report is priced at \$3,290 for an individual-user license and \$6,390 for a multi-user corporate license.

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

**Web Site:** [www.icinsights.com](http://www.icinsights.com) • **Phone:** +1-480-348-1133 • **E-mail:** [info@icinsights.com](mailto:info@icinsights.com)