

**NOVEMBER 9, 2010**

## **Memory and Foundry Companies Climb in 2010 Semiconductor Ranking!**

*UMC jumps into top 20 while Elpida moves up four places.*

A forecast of the 2010 top 20 semiconductor suppliers is included as part of IC Insights' soon-to-be-released November Update to *The McClean Report*. As shown in Figure 1, all of the companies, except Sony, are expected to register strong double-digit growth rates in 2010. Moreover, only \$50 million in sales is forecast to separate the 4th and 5th place rankings this year (i.e., these spots are still up for grabs).

Of the big five memory suppliers in the top 20 ranking (i.e., Samsung, Toshiba, Hynix, Micron, and Elpida), all but Samsung are expected to gain at least one position (with Elpida jumping four spots to 11th place). Although Samsung is not forecast to move up in the ranking, it is likely to gain ground on the number one supplier—Intel. In 2009, Intel's semiconductor sales were 52% larger than Samsung's. However, Intel's sales margin over Samsung is forecast to shrink to only 23% this year!

The two largest semiconductor foundries, TSMC and UMC, are also expected to do very well in 2010. As shown in Figure 1, TSMC is forecast to move up two spots in the ranking to the 4th position, while UMC is expected to jump five spots into 19th place!

If foundries were excluded from the top 20 ranking, MediaTek (2010 sales forecast to be \$3,695 million) and Marvell (2010 sales forecast to be \$3,574 million) would claim the 19th and 20th positions, respectively. It should be noted that MediaTek, after growing by 22% in 2009 (while the total semiconductor industry declined 9%), is forecast to grow only 6% in 2010 (while the total semiconductor market grows 31%). The low growth rate for the company this year is expected to drop MediaTek from being ranked 17th in 2009 to 21st in 2010.

Although Renesas and NEC did not officially merge until April 1, 2010, for ease of comparison, IC Insights combined the two companies' semiconductor sales for all of 2009 and 2010. As shown, the "new" Renesas is forecast to fall from 4th place in 2009 to 6th in 2010.

Of the top 20 suppliers, there are expected to be 10 companies that outperform the total semiconductor industry growth rate of 31% this year and 10 that fall short of this mark. Of the top 10 performers, five are forecast to be the big memory companies mentioned above and two are expected to be the top foundries TSMC and UMC. The remaining top performing companies include Broadcom, Infineon, and TI.

### **MORE INFORMATION CONTACT**

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## 2010F Top 20 Semiconductor Sales Leaders (\$M)

2010F Rank	2009 Rank	Company	Headquarters	2009 Tot Semi	2010 Tot Semi	10/09 % Change
1	1	Intel	U.S.	32,325	40,095	24%
2	2	Samsung	South Korea	21,273	32,677	54%
3	5	Toshiba	Japan	9,537	13,454	41%
4	6	TSMC**	Taiwan	8,989	13,072	45%
5	3	TI	U.S.	9,697	13,022	34%
6	4	Renesas Electronics*	Japan	9,649	11,791	22%
7	9	Hynix	South Korea	6,320	10,600	68%
8	7	ST	Europe	8,466	10,212	21%
9	10	Micron	U.S.	5,450	9,222	69%
10	8	Qualcomm***	U.S.	6,409	7,098	11%
11	15	Elpida	Japan	3,948	6,919	75%
12	14	Broadcom***	U.S.	4,271	6,500	52%
13	11	AMD***	U.S.	5,403	6,460	20%
14	13	Infineon	Europe	4,617	6,248	35%
15	12	Sony	Japan	5,245	5,652	8%
16	16	NXP	Europe	3,547	4,431	25%
17	19	Freescale	U.S.	3,302	4,176	26%
18	18	Fujitsu	Japan	3,377	4,123	22%
19	24	UMC**	Taiwan	2,815	3,942	40%
20	20	Panasonic	Japan	3,237	3,907	21%
—	—	<b>Total</b>	—	<b>157,877</b>	<b>213,601</b>	<b>35%</b>

\*The merged entity of Renesas and NEC

\*\*Foundry

\*\*\*Fabless

Source: IC Insights, company reports

**Figure 1**

### Report Details:

IC Insights' is now taking orders for the new 2011 edition of *The McClean Report* that will be released in January. In addition to the January report, packed with 400 tables and graphs, the 2011 *McClean Report* subscription also comes with free monthly updates by e-mail from March through November (including a 200+ page *Mid-Year Report*). A single-user subscription to the 2011 edition of *The McClean Report* is priced at \$3,190 and includes an Internet access password. The subscription is also available under a multi-user worldwide corporate license for \$6,290.

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#### 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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