

RESEARCH BULLETIN

APRIL 16, 2015

2015 Semiconductor Sales Leaders Forecast to Include NXP/Freescale; One Japanese Company

Total top 10 marketshare of semiconductor industry now back over 50%.

IC Insights will release its April *Update* to the 2015 *McClean Report* later this month. The *Update* includes the final 2014 company sales rankings for the top 50 semiconductor and top 50 IC companies, and the leading IC foundries. Also included are 2014 IC company sales rankings for various IC product segments (e.g., DRAM, MPU, etc.).

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In 2014, there were only two Japanese companies—Toshiba and Renesas—that were among the top 10 semiconductor suppliers (Figure 1). Assuming the NXP/Freescale merger is completed later this year, IC Insights forecasts that Toshiba will be the lone Japanese company left in the top 10 ranking,. Anyone who has been involved in the semiconductor industry for a reasonable amount of time realizes this is a major shift and a big departure for a country that once was feared and revered when it came to its semiconductor sales presence in the global market.

Top 10 Worldwide Semiconductor Sales Leaders* (\$B)

Rank	1990	1995	2000	2006	2014	2015F
1	NEC 4.8	Intel 13.6	Intel 29.7	Intel 31.6	Intel 51.4	Intel
2	Toshiba 4.8	NEC 12.2	Toshiba 11.0	Samsung 19.7	Samsung 37.8	Samsung
3	Hitachi 3.9	Toshiba 10.6	NEC 10.9	TI 13.7	Qualcomm** 19.3	Qualcomm**
4	Intel 3.7	Hitachi 9.8	Samsung 10.6	Toshiba 10.0	Micron 16.7	SK Hynix
5	Motorola 3.0	Motorola 8.6	TI 9.6	ST 9.9	SK Hynix 16.3	Micron
6	Fujitsu 2.8	Samsung 8.4	Motorola 7.9	Renesas 8.2	TI 12.2	TI
7	Mitsubishi 2.6	TI 7.9	ST 7.9	Hynix 7.4	Toshiba 11.0	NXP/Freescale
8	TI 2.5	IBM 5.7	Hitachi 7.4	Freescale 6.1	Broadcom** 8.4	Toshiba
9	Philips 1.9	Mitsubishi 5.1	Infineon 6.8	NXP 5.9	ST 7.4	Broadcom**
10	Matsushita 1.8	Hyundai 4.4	Philips 6.3	NEC 5.7	Renesas 7.3	ST
Top 10 Total (\$B)		31.8	86.3	108.1	118.2	187.7
Semi Market (\$B)		54.3	154	218.6	265.5	354.8
Top 10 % of Total Semi		59%	56%	49%	45%	53%

Source: IC Insights

*Not including foundries

**Fabless

Figure 1

Figure 1 traces the top 10 semiconductor companies dating back to 1990, when Japanese semiconductor manufacturers wielded their greatest influence on the global stage and held six of the top 10 positions. The six Japanese companies that were counted among the top 10 semiconductor suppliers in 1990 is a number that has not been matched by any country or region since (although the U.S. had five suppliers in the top 10 in 2014). The number of Japanese companies ranked in the top 10 in semiconductor sales slipped to four in 1995, fell to three companies in 2000 and 2006, and then to only two companies in 2014.

Figure 1 also shows that, in total, the top 10 semiconductor sales leaders are making a marketshare comeback. After reaching a marketshare low of 45% in 2006, the top 10 semiconductor sales leaders held a 53% share of the total semiconductor market in 2014. Although the top 10 share in 2014 was eight points higher than in 2006, it was still six points below the 59% share they held in 1990. As fewer suppliers are able to achieve the economies of scale needed to successfully invest and compete in the semiconductor industry, it is expected that the top 10 share of the worldwide semiconductor market will continue to slowly increase over the next few years.

Report Details: *The 2015 McClean Report*

Further details on semiconductor sales rankings by company for 2014, are included in the April *Update to The McClean Report—A Complete Analysis and Forecast of the Integrated Circuit Industry*. A subscription to *The McClean Report* includes **free** monthly updates from March through November (including a 250+ page *Mid-Year Report*), and **free** access to subscriber-only webinars throughout the year. An individual-user license to the 2015 edition of *The McClean Report* is priced at \$3,590 and includes an Internet access password. A multi-user worldwide corporate license is available for \$6,590.

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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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