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Analyzing the Global Semiconductors Industry 2019

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Abstracts

The year 2019 is a year of contraction for the global semiconductor industry, especially surrounded by intense economic uncertainties stemming from the US-China trade war. However, from 2020, the industry is again poised for strong growth as artificial intelligence (AI) is rapidly adding to global demand.

With technological innovation happening at a breakneck speed worldwide, the semiconductor industry is also no exception to this, and it can look forward to significant growth in the coming years following a rather weak 2019.

In 2018, global semiconductor sales stood at a total of US$ 481 billion, and over the coming four years, sales are expected to keep growing (albeit at a slower rate) to cross US$572 billion by the end of 2022. Samsung, a leading player in the global semiconductor industry, has recently undertaken a massive capital spending on its semiconductor division and this is expected to drive overcapacity in the memory segment, likely causing a fall in sales of memory products in 2019. Nevertheless, 2020 will witness a recovery of the sector once again.

The global semiconductor industry is expected to be massively driven by the demand for chips that are related to the booming artificial intelligence sector. Much of this demand is likely to emerge from the industrial and automotive markets, with the automotive market expected to grow the fastest through 2022.

The introduction of the 5G technology and its growth in emerging markets is going to drive the use of semiconductors in the communications market while the continuing growth of video game consoles and handhelds, TVs, and digital set-top boxes will continue to drive the need for semiconductors in the consumer electronics markets. Growth in optoelectronic chips is also expected to remain healthy.

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Asia Pacific will continue to lead the global semiconductor market and will remain the most significant contributor to the industry revenues. China is currently the biggest purchaser and importer of chips, and the development of the semiconductor industry is going to remain a huge priority for the Chinese government.

Overall, artificial intelligence is going to emerge as the next new catalyst for at least the coming decade for the global semiconductor market. Connectivity, sensing, and instant computing are going to be responsible for driving a dramatic demand for AI-tailored semiconductors in the coming years, with the Asia Pacific continuing to lead the industry.

Aruvian Research analyzes the global semiconductors industry in its research presentation Analyzing the Global Semiconductors Industry 2019. The report is a comprehensive coverage of the industry, which is analyzed through an industry definition, industry profile, market size, market value, industry segmentation, and other factors that impact the market.

We analyze the industry concentration in our report, along with a geographic concentration. Globalization in the global semiconductors industry is also analyzed.

A segmentation of the market through the major industry products is carried out in the report. We focus on passive electric components as well as other components and devices.

Moving on to the cost analysis of the global semiconductor industry, we analyze the market through an industry profit analysis, the cost of material inputs, capital intensity of the market, revenue volatility and other costs involved in the industry.

A life cycle analysis is also included in the report, along with an analysis of the factors driving growth in the market and challenges facing the industry. We also analyze the global trade in semiconductors and electronic components.

Regulatory framework governing the industry is analyzed along with a look at the industry tariffs and taxes.

A Porter's five forces analysis of the global semiconductor industry is carried out. It uses concepts developed in Industrial Organization (IO) economics to derive five forces that determine the competitive intensity and therefore attractiveness of a market. Porter referred to these forces as the microenvironment, to contrast it with the more general

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term macro-environment. They consist of those forces close to a company that affect its ability to serve its customers and make a profit.

Since technological developments have a huge role to play in this industry, we dedicate a section to analyzing the latest technical developments in the global semiconductor industry.

Key semiconductor markets around the world are analyzed through an industry profile, market growth by value analysis, industry segmentation, and an industry forecast. Markets analyzed include China, France, Germany, Italy, Japan, South Korea, Taiwan, United Kingdom and United States.

Future perspective of the industry is analyzed till the year 2022.

Competition in the industry and market share of the leading industry players are analyzed followed by an in-depth analysis of the major players themselves. The leading industry contributors are analyzed through a corporate profile, a business segment analysis, a financial analysis, their industry presence, company strategy and a SWOT analysis.

Players analyzed include the industry stalwarts such as Texas Instruments, Intel Corporation, Samsung Electronics, SK Hynix, STMicroelectronics, Taiwan Semiconductor Manufacturing, amongst many others. In total, we analyze over 30 industry players.

Aruvian Research’s analysis of the Global Semiconductor Industry 2019 is a complete strategic and statistical analysis of this fast growing industry.

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