

Semiconductor Foundry Market Report by Technology Node (10/7/5nm, 16/14nm, 20nm, 45/40nm, and Others), Foundry Type (Pure Play Foundry, IDMs), Application (Communication, Consumer Electronics, Computer, Automotive, and Others), and Region 2024-2032

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Abstracts

The global semiconductor foundry market size reached US\$ 82.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 132.3 Billion by 2032, exhibiting a growth rate (CAGR) of 5.2% during 2024-2032. The market is experiencing steady growth driven by the rising demand for advanced electronics across various sectors, including consumer electronics, automotive, and telecommunications, the escalating shift towards electric and autonomous vehicles, and the increasing adoption of AI and machine learning.

Semiconductor Foundry Market Analysis:

Market Growth and Size: The global market is experiencing robust growth, propelled by the escalating demand for advanced electronics across various sectors. This market's expansion is underscored by the increasing production of consumer electronics, the automotive sector's evolution, and the rise of IoT applications, contributing to a significant market size with a strong growth trajectory.

Technological Advancements: Technological innovations, particularly the shift to extreme ultraviolet (EUV) lithography, are revolutionizing semiconductor manufacturing. These advancements facilitate the production of smaller, more efficient, and more powerful semiconductors, essential for modern applications in the electronics and automotive industries, thereby driving market growth.

Industry Applications: The semiconductor foundry market serves a wide range of

industries, with notable demand from consumer electronics, automotive, and industrial sectors. The rising integration of advanced semiconductors in smartphones, autonomous vehicles, and IoT devices exemplifies the market's extensive application scope.

Key Market Trends: A significant trend in the semiconductor foundry market is the increasing investment in research and development of new semiconductor materials such as silicon carbide and gallium nitride. Additionally, there is a growing focus on manufacturing chips that support emerging technologies such as 5G and AI, which are pivotal in driving future market trends.

Geographical Trends: The market is witnessing a realignment and expansion of the global supply chain, with a shift towards geographical diversification in production. This trend is driven by geopolitical factors and supply chain vulnerabilities, leading to an increase in semiconductor manufacturing capabilities in regions outside traditional hubs.

Competitive Landscape: The semiconductor foundry market features a competitive landscape with several key players dominating the market. These players are engaged in strategic partnerships, technological advancements, and expanding their production capacities to meet the growing global demand, thereby shaping the market's competitive dynamics.

Challenges and Opportunities: The market faces challenges such as supply chain disruptions and geopolitical tensions, which impact production and distribution. However, these challenges present opportunities for market growth through the diversification of supply chains and the establishment of new manufacturing facilities in various regions, ensuring a more resilient and robust market structure.

Semiconductor Foundry Market Trends: Rising Demand for Advanced Electronics

The global market is significantly driven by the escalating demand for advanced electronic devices, including smartphones, computers, and IoT devices. This rise is fueled by technological advancements and the proliferation of high-speed internet services. As these devices become increasingly integral to daily life and business operations, there is a growing need for more sophisticated and powerful semiconductors. This trend is particularly evident in the development of 5G technology and AI applications, which require advanced chipsets. Additionally, the automotive industry's shift towards electric and autonomous vehicles is further bolstering the demand for high-performance semiconductors, subsequently driving the growth of semiconductor foundries dedicated to manufacturing these complex components.

Technological Advancements in Semiconductor Manufacturing

Technological innovation in semiconductor manufacturing processes is a crucial factor propelling the growth of the global market. The transition from traditional lithography to extreme ultraviolet (EUV) lithography is enabling the production of smaller, more efficient, and more powerful semiconductors. This advancement is essential to meet the increasing demands for high-performance chips in various sectors, including consumer electronics, automotive, and industrial applications. Moreover, continuous research and development in semiconductor materials, such as silicon carbide (SiC) and gallium nitride (GaN), are fostering new opportunities in power electronics and radio-frequency applications. These technological strides are instrumental in driving innovation, reducing manufacturing costs, and enhancing the capabilities of semiconductor devices, thereby fueling market growth.

Global Supply Chain Realignment and Expansion

The market is also influenced by the evolving dynamics of the global supply chain. In recent years, geopolitical tensions and trade disputes have prompted many countries and companies to reconsider their dependency on specific regions for critical semiconductor supplies. This shift is leading to a realignment of the global semiconductor supply chain, with an increased focus on diversifying production locations and investing in domestic manufacturing capabilities. In addition, the COVID-19 pandemic exposed the vulnerabilities of highly concentrated supply chains, accelerating efforts toward geographic diversification. This scenario is encouraging investments in new foundry capacities outside traditional hubs, such as Taiwan and South Korea, and is fostering the growth of the semiconductor foundry market by creating new regional players and expanding production capabilities to meet the global demand.

Semiconductor Foundry Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on technology node, foundry type and application.

Breakup by Technology Node:

10/7/5nm

16/14nm

20nm

45/40nm

Others

10/7/5nm accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the technology node. This includes 10/7/5nm, 16/14nm, 20nm, 45/40nm, and others. According to the report, 10/7/5nm represented the largest segment.

The 10/7/5nm segment represents the most advanced technology node in the market and currently holds the largest market share. This segment caters to high-performance applications in sectors such as smartphones, high-end computing, and data centers, where energy efficiency and processing power are crucial. The chips manufactured at this node are characterized by their high transistor density, which significantly enhances their performance and energy efficiency. The demand in this segment is driven by the continuous need for more powerful and efficient processors in consumer electronics and the growing interest in artificial intelligence and machine learning applications, which require cutting-edge processing capabilities.

The 16/14nm segment is an important part of the market, serving as a balance between performance and cost. This technology node is widely used in a variety of consumer electronics and mid-range computing devices. It offers a significant improvement in performance and power efficiency over its predecessors (such as 20nm), making it a popular choice for a broad range of applications, including mobile devices, gaming consoles, and automotive electronics.

The 20nm technology node segment, while older than the aforementioned nodes, still plays a crucial role in the market. This node marked a significant technological advancement when it was introduced, offering improved performance and power efficiency over the 45/40nm technology. It finds applications primarily in consumer electronics and some industrial applications where the balance of cost, performance, and power efficiency aligns with the needs of the products.

The 45/40nm technology node is one of the older segments in the semiconductor foundry market but still holds relevance for certain applications. This node is particularly significant in markets where the cost is a more critical factor than cutting-edge performance, such as in certain automotive applications, consumer electronics, and some industrial applications.

The 'Others' segment in the semiconductor foundry market includes all technology

nodes that are older or less common than the main categories listed above. This segment caters to a variety of specialized applications that do not require the latest technology or where the cost is a significant factor. These older nodes are often used in legacy systems, certain types of consumer electronics, and specific industrial applications where high performance is not a priority.

Breakup by Foundry Type:

Pure Play Foundry IDMs

IDMs holds the largest share in the industry

A detailed breakup and analysis of the semiconductor foundry market based on the foundry type has also been provided in the report. This includes pure play foundry and IDMs. According to the report, IDMs accounted for the largest market share.

Integrated Device Manufacturers (IDMs) represent the largest segment in the semiconductor foundry market. IDMs are companies that handle the entire production process of semiconductors, from design to manufacturing, and sometimes even to distribution. This segment's dominance is attributed to its comprehensive control over the semiconductor manufacturing process, allowing for greater quality assurance, supply chain management, and product customization. IDMs are particularly prominent in markets where high degrees of integration between design and manufacturing are crucial, such as in advanced computing, automotive, and high-end consumer electronics.

Pure play foundries are specialized semiconductor manufacturing facilities that do not have design capabilities and focus solely on the fabrication of semiconductor chips based on designs provided by their clients. This segment is significant in the semiconductor industry, as it allows design-oriented companies that do not own manufacturing facilities to access state-of-the-art fabrication technologies. Pure play foundries enable a flexible and cost-effective approach for companies focusing on semiconductor design and innovation without the capital investment required for manufacturing. These foundries are pivotal in driving innovation in the semiconductor space, as they provide a platform for smaller companies and startups to develop advanced technologies without the need for significant infrastructure investments.

Breakup by Application:

Communication
Consumer Electronics
Computer
Automotive
Others

Communication represents the leading market segment

A detailed breakup and analysis of the semiconductor foundry market based on the application has also been provided in the report. This includes communication, consumer electronics, computer, automotive, and others. According to the report, communication accounted for the largest market share.

The communication segment holds the largest share of the market, driven primarily by the rapid expansion of telecommunications infrastructure and the increasing adoption of smartphones and other communication devices worldwide. This segment benefits from the ongoing rollout of 5G technology, requiring advanced semiconductor components for both infrastructure and end-user devices. The demand in this segment is characterized by the need for high-speed, high-capacity, and energy-efficient semiconductor solutions that can support the ever-increasing data and connectivity requirements of modern communication systems. The growth in this segment is further fueled by the rising demand for wireless communication devices and the ongoing development of IoT technologies, which rely heavily on semiconductors for connectivity and functionality.

The consumer electronics segment is a major contributor to the market, encompassing a wide range of products such as televisions, gaming consoles, and home appliances. This market segment is driven by the constant demand for newer, more advanced consumer electronics featuring enhanced functionalities, higher performance, and improved energy efficiency. Along with this, the proliferation of smart home devices and the integration of AI and IoT technologies into consumer electronics are significant factors propelling the demand for sophisticated semiconductor components in this segment.

The computer segment of the market includes desktops, laptops, and servers, which require advanced semiconductor components for processing, memory, and storage functions. This segment is fueled by the continuous need for higher computing power and efficiency, particularly in the context of growing cloud computing and data center

demands. The market for personal computers, although mature, continues to evolve with new designs and capabilities, necessitating ongoing semiconductor innovation.

The automotive segment in the market is rapidly growing, influenced by the evolution of electric vehicles (EVs) and the increasing incorporation of electronic components in modern vehicles. Semiconductors in this segment are crucial for various applications, including advanced driver-assistance systems (ADAS), infotainment systems, power management, and vehicle connectivity. The shift towards autonomous vehicles and the ongoing electrification of the automotive industry are key drivers for sophisticated and reliable semiconductor components, making this segment a significant area of growth in the market.

The 'Others' segment in the market encompasses a variety of applications including industrial, medical, and military sectors. This segment benefits from the growing use of semiconductors in industrial automation, medical devices, and defense equipment. The demand in this segment is driven by the need for specialized semiconductor solutions that can operate under unique conditions, such as extreme temperatures or high-reliability requirements.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific leads the market, accounting for the largest semiconductor foundry market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The Asia Pacific region dominates the semiconductor foundry market, largely due to the presence of key manufacturing hubs and a robust electronics manufacturing ecosystem in countries such as Taiwan, South Korea, and China. This region is characterized by its extensive semiconductor manufacturing capabilities, substantial investments in R&D, and the presence of leading semiconductor companies. The growth in this segment is further propelled by the increasing demand for consumer electronics, the rapid development of communication infrastructure, and the burgeoning automotive sector in the region. Additionally, government initiatives and policies in these countries, aimed at enhancing the semiconductor industry, play a significant role in maintaining Asia Pacific's leading position in the global market.

North America is a significant player in the semiconductor foundry market, with a focus on high-end, innovative semiconductor technologies. The United States, in particular, is home to many leading semiconductor design companies and is known for its advanced research and development capabilities. The region's market is driven by the strong presence of technology giants, the high adoption rate of advanced electronics, and substantial investments in areas such as artificial intelligence, IoT, and 5G technology.

Europe's semiconductor foundry market is driven by its strong automotive industry, advanced industrial manufacturing, and a growing focus on developing IoT and AI technologies. European countries are known for their emphasis on quality and reliability, particularly in automotive and industrial applications, which require high-performance

semiconductor solutions. The market in this region benefits from the presence of leading automotive OEMs and industrial companies that are increasingly integrating electronics into their products.

The Latin American market is growing, driven by the increasing adoption of consumer electronics, expansion of telecommunication networks, and burgeoning automotive sector in the region. While the market is smaller compared to other regions, it offers potential for growth due to the rising demand for advanced technology and the ongoing efforts to develop local electronics manufacturing capabilities.

The Middle East and Africa region, though a smaller segment in the global semiconductor foundry market, is experiencing growth driven by the increasing adoption of mobile devices, expanding telecommunication infrastructure, and growing emphasis on diversifying economies beyond oil and gas. This region shows potential for development in the semiconductor sector, particularly with initiatives to establish technology and industrial hubs.

Leading Key Players in the Semiconductor Foundry Industry:

In the dynamic semiconductor foundry market, key players are actively engaging in various strategic initiatives to strengthen their market positions. These leading companies are heavily investing in research and development to innovate and improve semiconductor manufacturing processes, particularly focusing on advanced technology nodes such as 7nm and 5nm. Collaborations and partnerships are prevalent, aimed at expanding technological capabilities and accessing new market segments. Additionally, to meet the soaring global demand, they are scaling up production capacities and exploring geographic expansion to diversify their manufacturing bases. Key players are also navigating the complex geopolitical landscape, adapting supply chains to mitigate risks associated with regional dependencies. This adaptive and forward-looking approach is crucial for maintaining competitiveness in this rapidly evolving market.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

TSMC

DB HiTek

Fujitsu Semiconductor

GlobalFoundries

Magnachip

Powerchip
Samsung Group
Semiconductor Manufacturing International Corporation
STMicroelectronics
Tower Semiconductor Ltd.
United Microelectronics Corporation
X-Fab

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Latest News:

July 28, 2023: TSMC hosted a ceremony to mark the opening of its global research and development centre in Hsinchu, Taiwan. The event brought together customers, industry and academic R&D partners, partners in the design ecosystem, and senior government officials to celebrate the company's newest hub for bringing the next generation of semiconductor technology to reality.

November 06, 2023: DB HiTek announced that it is officially entering the ultra-high voltage (UHV) power semiconductor sector by updating its UHV power semiconductor process technology.

October 5, 2023: Fujitsu Semiconductor announced the RIKEN RQC-Fujitsu Collaboration Center's successful construction of a new 64 qubit superconducting quantum computer.

Key Questions Answered in This Report

1. What was the size of the global semiconductor foundry market in 2023?
2. What is the expected growth rate of the global semiconductor foundry market during 2024-2032?
3. What are the key factors driving the global semiconductor foundry market?
4. What has been the impact of COVID-19 on the global semiconductor foundry market?
5. What is the breakup of the global semiconductor foundry market based on the technology node?
6. What is the breakup of the global semiconductor foundry market based on the foundry type?
7. What is the breakup of the global semiconductor foundry market based on the application?
8. What are the key regions in the global semiconductor foundry market?

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