

Semiconductor Intellectual Property (IP) Market Report by IP Type (Processor IP, Interface IP, Memory IP, and Others), Revenue Source (Royalty, Licensing, Services), IP Core (Soft Cores, Hard Cores), Application (IDM Firms, Foundries, Fabless Firms, and Others), End Use Industry (Consumer Electronics, Telecom, Automotive, Healthcare, and Others), and Region 2024-2032

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Abstracts

The global semiconductor intellectual property (IP) market size reached US\$ 5.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 8.6 Billion by 2032, exhibiting a growth rate (CAGR) of 4.6% during 2024-2032. The market is primarily driven by the expanding electronics sector globally, the extensive utilization of multicore technology for consumer electronics, and the continuous technological innovations.

Semiconductor Intellectual Property (IP) Market Analysis:

Major Market Drivers: The escalating demand for cutting-edge and innovative IP solutions among the major companies to meet the requirements of emerging technologies, including AI, IoT, and 5G is catalyzing the semiconductor intellectual property (IP) market growth. Besides this, the growing popularity of specialized sources, such as IP providers to access verified and pre-designed blocks of IP, is further stimulating the semiconductor intellectual property (IP) market statistics.

Key Market Trends: The elevating requirement for IP related to deep learning accelerators, neural networks, and other AI-specific hardware is propelling the semiconductor intellectual property (IP) market demand. Moreover, the extensive utilization of solutions that offer high-speed data processing, wireless communication, and low-power consumption, owing to the growing popularity of 5G and the Internet of Things (IoT) technologies, is also bolstering the semiconductor intellectual property (IP) market value.

Competitive Landscape: Some of the major market players in the semiconductor intellectual property (IP) market share include Achronix Semiconductor Corporation, ARM Ltd. (SoftBank Group Corp.), Cadence Design Systems Inc., CEVA Inc., eMemory Technology Incorporated, Fujitsu Limited (Furukawa Group), Imagination Technologies Limited (Canyon Bridge Capital Partners, Inc.), Lattice Semiconductor Corp., Mentor Graphics Corporation (Siemens Aktiengesellschaft), Open-Silicon Inc. (SiFive), Rambus Inc., and Synopsys Inc among others.

Geographical Trends: North America, mainly the US, is the major hub for IP development and semiconductor innovation, which is augmenting the semiconductor intellectual property (IP) market. Besides this, Germany, France, and the UK are focusing primarily on developing IP for the industrial, automotive, and consumer electronics sectors, which is further propelling the semiconductor intellectual property (IP) market outlook. Moreover, the Asia Pacific, Latin America, and Middle East and Africa regions are characterized by the emerging trend of AI and machine learning in smart cities, healthcare, and autonomous vehicles.

Challenges and Opportunities: One of the major challenges of the market includes the rising complexity of semiconductor design, which requires specialized expertise. Developing and validating IP can be time-consuming and costly, especially for small companies and startups. However, the growing collaboration and partnerships between semiconductor companies, IP providers, and other stakeholders for the development of new, tailored, and innovative solutions present significant growth opportunities for the semiconductor intellectual property (IP) market.

Semiconductor Intellectual Property (IP) Market Trends:

Increasing Shift Towards Design Services

The rising shift of several companies and organizations towards providing IP as part of a wider design services package to offer consumers solutions with end-to-end semiconductor design is primarily driving the semiconductor intellectual property (IP) market statistics. Moreover, the extensive utilization of pre-designed IP subsystems that can be incorporated into larger designs is anticipated to propel the semiconductor intellectual property (IP) market forecast. For instance, in March 2023, Synopsys, Inc. announced an expanded agreement with Samsung Foundry to create a broad portfolio of IP to reduce design risk for automotive, mobile, High-Performance Computing (HPC) and multi-die configurations. This agreement expanded Synopsys' collaboration with Samsung to enhance the Synopsys IP offering for Samsung's advanced 8LPU, SF5, SF4 and SF3 processes and includes USB, PCI Express, Foundation IP, 112G Ethernet, UCIe, LPDDR, DDR, MIPI, etc.

Growing Focus on Security and Reliability

The escalating demand for IP related to hardware security, such as secure boot, cryptographic engines, and tamper-resistant components, on account of the increasing threats of cyberattacks, is augmenting the semiconductor intellectual property (IP) market growth. Moreover, the widespread adoption of IP solutions in high-speed data processing and wireless communication is catalyzing the global market. For example, in July 2023, Rambus Inc., announced the first in a family of quantum safe security IP products with its next-generation Root of Trust for data center and communications security. Quantum computers will be able to break current asymmetric encryption rapidly. The Rambus Root of Trust IP offers customers a full Post Quantum Cryptography (PQC) hardware security solution that protects useful data center and AI/ML assets and systems.

Rising Use of Electronic Components by Consumers

The rising need for semiconductor IP solutions in automotive, industrial, and consumer electronic applications is positively influencing the market growth. In addition to this, the emerging AI, 5G, and IoT technologies and the growing popularity of open-source RISC-V instruction set architecture are also propelling the market. For instance, in March 2024, Arteris, Inc., announced the immediate availability of the latest release of Ncore cache coherent network-on-chip (NoC) IP, which works with multiple processor IPs, including RISC-V and the next-generation Armv9 Cortex processor IP. Ncore boasts multi-protocol support, allowing seamless integration of IPs connected to the same NoC

fabric.

Semiconductor Intellectual Property (IP) Market 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 IP type, revenue source, IP core, application, and end use industry.

Breakup by IP Type:

Processor IP

Interface IP

Memory IP

Others

The report has provided a detailed breakup and analysis of the market based on the IP type. This includes processor IP, interface IP, memory IP, and others.

The extensive utilization of processor IP, including ARM's Cortex series in tablets, smartphones, embedded systems, and IoT devices is propelling the market demand. Besides this, the escalating demand for Interface IP, such as PCIe, USB, HDMI, and Ethernet to transfer data, connect gadgets, and enable audio/video transmission is augmenting the market globally. Moreover, the rising need for memory IP, including DRAM, SRAM, and flash memory to store instructions and data temporarily or permanently in electronic devices is also stimulating the market growth.

Breakup by Revenue Source:

Royalty

Licensing

Services

The report has provided a detailed breakup and analysis of the market based on the revenue source. This includes royalty, licensing, and services.

According to the semiconductor intellectual property (IP) market analysis, the most common method of monetizing semiconductor IP is royalty. IP providers receive royalties depending on the amount of chips manufactured or sold using their IP solutions. Additionally, licensing agreements are used for granting permission to semiconductor companies to use and access third-party IP. Furthermore, the growing popularity of customization, verification, and integration services for adding value to the IP and minimizing time-to-market and development costs is also catalyzing the semiconductor intellectual property (IP) market statistics.

Breakup by IP Core:

Soft Cores

Hard Cores

The report has provided a detailed breakup and analysis of the market based on the IP core. This includes soft cores and hard cores.

The elevating requirement for soft cores in applications demanding customization and flexibility, such as rapid development, prototyping, and low-volume production is bolstering the market growth forward. Moreover, the widespread adoption of hard cores in microcontrollers, microprocessors, and memory controllers, as they enhance area, power efficiency, and performance, is positively influencing the global market.

Breakup by Application:

IDM Firms

Foundries

Fabless Firms

Others

The report has provided a detailed breakup and analysis of the market based on the application. This includes IDM firms, foundries, fabless firms, and others.

Semiconductor IP finds extensive usage in several applications, including IDM firms, foundries, fabless firms. IDM firms utilize these solutions to improve their in-house design capabilities and for specialized functionalities. Moreover, foundries integrate IP services to optimize their manufacturing techniques, including quality control, test and measurement, or yield enhancement. Apart from this, fabless firms may license IP for processors, memory, interfaces, or other core functions.

Breakup by End Use Industry:

Consumer Electronics

Telecom

Automotive

Healthcare

Others

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes consumer electronics, telecom, automotive, healthcare, and others.

Semiconductor IP finds widespread applications in mobile devices, gaming consoles, and home entertainment for memory, processors, interfaces, and wireless connectivity. Besides this, the elevating requirement for IP solutions in switches, routers, modems, smartphones, and base stations for packet switching and high-speed data processing is augmenting the market growth. Moreover, the rising need for semiconductor IP in advanced driver assistance systems for radar and image processing and sensor fusion purposes is propelling the market forward. In addition to this, semiconductor IP is increasingly popular in the healthcare sector for patient monitoring and medical imaging applications.

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

The 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, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

North America, mainly the US, is the major hub for IP development and semiconductor innovation. Besides this, Germany, France, and the UK are focusing largely on developing IP for the industrial, automotive, and consumer electronics sectors. Moreover, the Asia Pacific, Latin America, and Middle East and Africa regions are characterized by the emerging trend of AI and machine learning in smart cities, healthcare, and autonomous vehicles. For instance, Synopsys, Inc. announced that the VMM verification methodology, represented in the ARM-Synopsys Verification Methodology Manual (VMM), has been adopted by the leading electronics companies in China for developing advanced verification environments. The VMM methodology is used by various System-on-Chip (SoC) and silicon IP verification teams across the globe to speed the development of powerful SystemVerilog-based verification environments and to achieve measurable functional coverage goals in less time with little effort.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Competitive analysis such as market structure, key player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided. Some of the major market players in the Semiconductor intellectual property (IP) industry include:

Achronix Semiconductor Corporation

ARM Ltd. (SoftBank Group Corp.)

Cadence Design Systems Inc.

CEVA Inc.

eMemory Technology Incorporated

Fujitsu Limited (Furukawa Group)

Imagination Technologies Limited (Canyon Bridge Capital Partners, Inc.)

Lattice Semiconductor Corp.

Mentor Graphics Corporation (Siemens Aktiengesellschaft)

Open-Silicon Inc. (SiFive)

Rambus Inc.

Synopsys Inc.

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

Semiconductor Intellectual Property (IP) Market News:

March 2024: Arteris, Inc., announced the immediate availability of the latest release of Ncore cache coherent network-on-chip (NoC) IP, which works with multiple processor IPs, including RISC-V and the next-generation Armv9 Cortex processor IP. Ncore boasts multi-protocol support, allowing seamless integration of IPs connected to the same NoC fabric.

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Key Questions Answered in This Report:

How has the global semiconductor intellectual property (IP) market performed so far and how will it perform in the coming years?

What has been the impact of COVID-19 on the global semiconductor intellectual property (IP) market?

What are the key regional markets?

What is the breakup of the market based on the IP type?

What is the breakup of the market based on the revenue source?

What is the breakup of the market based on the IP core?

What is the breakup of the market based on the application?

What is the breakup of the market based on the end use industry?

What are the various stages in the value chain of the industry?

What are the key driving factors and challenges in the industry?

What is the structure of the global semiconductor intellectual property (IP) market and who are the key players?

What is the degree of competition in the industry?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL SEMICONDUCTOR INTELLECTUAL PROPERTY (IP) MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY IP TYPE

- 6.1 Processor IP
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Interface IP
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Memory IP

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Others
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast

7 MARKET BREAKUP BY REVENUE SOURCE

- 7.1 Royalty
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Licensing
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Services
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast

8 MARKET BREAKUP BY IP CORE

- 8.1 Soft Cores
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 Hard Cores
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast

9 MARKET BREAKUP BY APPLICATION

- 9.1 IDM Firms
 - 9.1.1 Market Trends
 - 9.1.2 Market Forecast
- 9.2 Foundries
 - 9.2.1 Market Trends
 - 9.2.2 Market Forecast
- 9.3 Fabless Firms
 - 9.3.1 Market Trends
 - 9.3.2 Market Forecast
- 9.4 Others

9.4.1 Market Trends

9.4.2 Market Forecast

10 MARKET BREAKUP BY END USE INDUSTRY

10.1 Consumer Electronics

10.1.1 Market Trends

10.1.2 Market Forecast

10.2 Telecom

10.2.1 Market Trends

10.2.2 Market Forecast

10.3 Automotive

10.3.1 Market Trends

10.3.2 Market Forecast

10.4 Healthcare

10.4.1 Market Trends

10.4.2 Market Forecast

10.5 Others

10.5.1 Market Trends

10.5.2 Market Forecast

11 MARKET BREAKUP BY REGION

11.1 North America

11.1.1 United States

11.1.1.1 Market Trends

11.1.1.2 Market Forecast

11.1.2 Canada

11.1.2.1 Market Trends

11.1.2.2 Market Forecast

11.2 Asia Pacific

11.2.1 China

11.2.1.1 Market Trends

11.2.1.2 Market Forecast

11.2.2 Japan

11.2.2.1 Market Trends

11.2.2.2 Market Forecast

11.2.3 India

11.2.3.1 Market Trends

- 11.2.3.2 Market Forecast
- 11.2.4 South Korea
 - 11.2.4.1 Market Trends
 - 11.2.4.2 Market Forecast
- 11.2.5 Australia
 - 11.2.5.1 Market Trends
 - 11.2.5.2 Market Forecast
- 11.2.6 Indonesia
 - 11.2.6.1 Market Trends
 - 11.2.6.2 Market Forecast
- 11.2.7 Others
 - 11.2.7.1 Market Trends
 - 11.2.7.2 Market Forecast
- 11.3 Europe
 - 11.3.1 Germany
 - 11.3.1.1 Market Trends
 - 11.3.1.2 Market Forecast
 - 11.3.2 France
 - 11.3.2.1 Market Trends
 - 11.3.2.2 Market Forecast
 - 11.3.3 United Kingdom
 - 11.3.3.1 Market Trends
 - 11.3.3.2 Market Forecast
 - 11.3.4 Italy
 - 11.3.4.1 Market Trends
 - 11.3.4.2 Market Forecast
 - 11.3.5 Spain
 - 11.3.5.1 Market Trends
 - 11.3.5.2 Market Forecast
 - 11.3.6 Russia
 - 11.3.6.1 Market Trends
 - 11.3.6.2 Market Forecast
 - 11.3.7 Others
 - 11.3.7.1 Market Trends
 - 11.3.7.2 Market Forecast
- 11.4 Latin America
 - 11.4.1 Brazil
 - 11.4.1.1 Market Trends
 - 11.4.1.2 Market Forecast

- 11.4.2 Mexico
 - 11.4.2.1 Market Trends
 - 11.4.2.2 Market Forecast
- 11.4.3 Others
 - 11.4.3.1 Market Trends
 - 11.4.3.2 Market Forecast
- 11.5 Middle East and Africa
 - 11.5.1 Market Trends
 - 11.5.2 Market Breakup by Country
 - 11.5.3 Market Forecast

12 SWOT ANALYSIS

- 12.1 Overview
- 12.2 Strengths
- 12.3 Weaknesses
- 12.4 Opportunities
- 12.5 Threats

13 VALUE CHAIN ANALYSIS

14 PORTERS FIVE FORCES ANALYSIS

- 14.1 Overview
- 14.2 Bargaining Power of Buyers
- 14.3 Bargaining Power of Suppliers
- 14.4 Degree of Competition
- 14.5 Threat of New Entrants
- 14.6 Threat of Substitutes

15 PRICE ANALYSIS

16 COMPETITIVE LANDSCAPE

- 16.1 Market Structure
- 16.2 Key Players
- 16.3 Profiles of Key Players
 - 16.3.1 Achronix Semiconductor Corporation
 - 16.3.1.1 Company Overview

- 16.3.1.2 Product Portfolio
- 16.3.2 ARM Ltd. (SoftBank Group Corp.)
 - 16.3.2.1 Company Overview
 - 16.3.2.2 Product Portfolio
 - 16.3.2.3 Financials
- 16.3.3 Cadence Design Systems Inc.
 - 16.3.3.1 Company Overview
 - 16.3.3.2 Product Portfolio
 - 16.3.3.3 Financials
 - 16.3.3.4 SWOT Analysis
- 16.3.4 CEVA Inc.
 - 16.3.4.1 Company Overview
 - 16.3.4.2 Product Portfolio
 - 16.3.4.3 Financials
 - 16.3.4.4 SWOT Analysis
- 16.3.5 eMemory Technology Incorporated
 - 16.3.5.1 Company Overview
 - 16.3.5.2 Product Portfolio
 - 16.3.5.3 Financials
- 16.3.6 Fujitsu Limited (Furukawa Group)
 - 16.3.6.1 Company Overview
 - 16.3.6.2 Product Portfolio
 - 16.3.6.3 Financials
 - 16.3.6.4 SWOT Analysis
- 16.3.7 Imagination Technologies Limited (Canyon Bridge Capital Partners, Inc.)
 - 16.3.7.1 Company Overview
 - 16.3.7.2 Product Portfolio
 - 16.3.7.3 Financials
- 16.3.8 Lattice Semiconductor Corp.
 - 16.3.8.1 Company Overview
 - 16.3.8.2 Product Portfolio
 - 16.3.8.3 Financials
 - 16.3.8.4 SWOT Analysis
- 16.3.9 Mentor Graphics Corporation (Siemens Aktiengesellschaft)
 - 16.3.9.1 Company Overview
 - 16.3.9.2 Product Portfolio
 - 16.3.9.3 SWOT Analysis
- 16.3.10 Open-Silicon Inc. (SiFive)
 - 16.3.10.1 Company Overview

- 16.3.10.2 Product Portfolio
- 16.3.11 Rambus Inc.
 - 16.3.11.1 Company Overview
 - 16.3.11.2 Product Portfolio
 - 16.3.11.3 Financials
- 16.3.12 Synopsys Inc.
 - 16.3.12.1 Company Overview
 - 16.3.12.2 Product Portfolio
 - 16.3.12.3 Financials
 - 16.3.12.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Semiconductor Intellectual Property Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Semiconductor Intellectual Property Market Forecast: Breakup by IP Type (in Million US\$), 2024-2032

Table 3: Global: Semiconductor Intellectual Property Market Forecast: Breakup by Revenue Source (in Million US\$), 2024-2032

Table 4: Global: Semiconductor Intellectual Property Market Forecast: Breakup by IP Core (in Million US\$), 2024-2032

Table 5: Global: Semiconductor Intellectual Property Market Forecast: Breakup by Application (in Million US\$), 2024-2032

Table 6: Global: Semiconductor Intellectual Property Market Forecast: Breakup by End Use Industry (in Million US\$), 2024-2032

Table 7: Global: Semiconductor Intellectual Property Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 8: Global: Semiconductor Intellectual Property Market Structure

Table 9: Global: Semiconductor Intellectual Property Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Semiconductor Intellectual Property Market: Major Drivers and Challenges

Figure 2: Global: Semiconductor Intellectual Property Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Semiconductor Intellectual Property Market: Breakup by IP Type (in %), 2023

Figure 4: Global: Semiconductor Intellectual Property Market: Breakup by Revenue Source (in %), 2023

Figure 5: Global: Semiconductor Intellectual Property Market: Breakup by IP Core (in %), 2023

Figure 6: Global: Semiconductor Intellectual Property Market: Breakup by Application (in %), 2023

Figure 7: Global: Semiconductor Intellectual Property Market: Breakup by End Use Industry (in %), 2023

Figure 8: Global: Semiconductor Intellectual Property Market: Breakup by Region (in %), 2023

Figure 9: Global: Semiconductor Intellectual Property Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 10: Global: Semiconductor Intellectual Property (Processor IP) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Semiconductor Intellectual Property (Processor IP) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Semiconductor Intellectual Property (Interface IP) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Semiconductor Intellectual Property (Interface IP) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Semiconductor Intellectual Property (Memory IP) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Semiconductor Intellectual Property (Memory IP) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Semiconductor Intellectual Property (Other IP Types) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Semiconductor Intellectual Property (Other IP Types) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Semiconductor Intellectual Property (Royalty) Market: Sales Value (in

Million US\$), 2018 & 2023

Figure 19: Global: Semiconductor Intellectual Property (Royalty) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Semiconductor Intellectual Property (Licensing) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Semiconductor Intellectual Property (Licensing) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Semiconductor Intellectual Property (Services) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: Global: Semiconductor Intellectual Property (Services) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: Global: Semiconductor Intellectual Property (Soft Cores) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: Global: Semiconductor Intellectual Property (Soft Cores) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: Global: Semiconductor Intellectual Property (Hard Cores) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: Global: Semiconductor Intellectual Property (Hard Cores) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: Global: Semiconductor Intellectual Property (IDM Firms) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: Global: Semiconductor Intellectual Property (IDM Firms) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: Global: Semiconductor Intellectual Property (Foundries) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: Global: Semiconductor Intellectual Property (Foundries) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: Global: Semiconductor Intellectual Property (Fabless Firms) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: Global: Semiconductor Intellectual Property (Fabless Firms) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: Global: Semiconductor Intellectual Property (Other Applications) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: Global: Semiconductor Intellectual Property (Other Applications) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: Global: Semiconductor Intellectual Property (Consumer Electronics) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: Global: Semiconductor Intellectual Property (Consumer Electronics) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: Global: Semiconductor Intellectual Property (Telecom) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: Global: Semiconductor Intellectual Property (Telecom) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: Global: Semiconductor Intellectual Property (Automotive) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 41: Global: Semiconductor Intellectual Property (Automotive) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Global: Semiconductor Intellectual Property (Healthcare) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Global: Semiconductor Intellectual Property (Healthcare) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: Global: Semiconductor Intellectual Property (Other End Use Industries) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Global: Semiconductor Intellectual Property (Other End Use Industries) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: North America: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: North America: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: United States: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: United States: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: Canada: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: Canada: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: Asia Pacific: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: Asia Pacific: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: China: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: China: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: Japan: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: Japan: Semiconductor Intellectual Property Market Forecast: Sales Value (in

Million US\$), 2024-2032

Figure 58: India: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: India: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: South Korea: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: South Korea: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Australia: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Australia: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Indonesia: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Indonesia: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: Others: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: Others: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: Europe: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: Europe: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Germany: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Germany: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: France: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: France: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: United Kingdom: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: United Kingdom: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 76: Italy: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 77: Italy: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 78: Spain: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 79: Spain: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 80: Russia: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 81: Russia: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 82: Others: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 83: Others: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 84: Latin America: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 85: Latin America: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 86: Brazil: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 87: Brazil: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 88: Mexico: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 89: Mexico: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 90: Others: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 91: Others: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 92: Middle East and Africa: Semiconductor Intellectual Property Market: Sales Value (in Million US\$), 2018 & 2023

Figure 93: Middle East and Africa: Semiconductor Intellectual Property Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 94: Global: Semiconductor Intellectual Property Industry: SWOT Analysis

Figure 95: Global: Semiconductor Intellectual Property Industry: Value Chain Analysis

Figure 96: Global: Semiconductor Intellectual Property Industry: Porter's Five Forces Analysis

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