

# 2018-2023 Global Silicon-on-Insulator (SOI) Consumption Market Report

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## Abstracts

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In this report, LP Information covers the present scenario (with the base year being 2017) and the growth prospects of global Silicon-on-Insulator (SOI) market for 2018-2023.

Silicon-On-Insulator (SOI) is a semiconductor fabrication technique developed by IBM that uses pure crystal silicon and silicon oxide for integrated circuits (ICs) and microchips. An SOI microchip processing speed is often 30% faster than today's complementary metal-oxide semiconductor (CMOS)-based chips and power consumption is reduced 80%, which makes them ideal for mobile devices. SOI chips also reduce the soft error rate, which is data corruption caused by cosmic rays and natural radioactive background signals.

SOI, as the name suggests, consists of a top thin layer of silicon and a bottom thick layer of silicon. An insulator material such as silicon dioxide (SiO<sub>2</sub>) is placed between these two layers. SOI offers high performance, low power consumption, and high speed compared to traditional silicon wafers. All these factors make it an ideal choice for portable applications such as mobile phones, portable digital assistants (PDAs), notebooks, digital cameras, and others. These wafers were developed in the 1960s for defense and military applications, and the commercialization of these wafers took place gradually

The growth of this market is propelled by the growth in the consumer electronics market, low wafer and gate cost, low operating voltage, and miniaturization of semiconductor devices.

Based on diameters, 200 mm SOI wafers held the largest share of the SOI market in 2017. The market for these wafers is expected to grow at a high rate between 2017 and 2025. 200 mm wafers are mainly used for manufacturing RFSOI wafers, which are

further used in smartphones for manufacturing antenna switches and other important components. Currently, virtually all the RF chips, including 2G, 3G, and 4G, are manufactured by using 200 mm SOI wafers. The improvement will be primarily driven by the growth in sales volumes for 300 mm wafers and by controlling production costs on the small diameter line that is running at full capacity. The loading rate of the 300 mm production lines improved significantly, but still remains globally low.

BESOI, ELTRAN, SoS, SiMOX and smart cut are the technology segment of the market. Smart cut technology accounted for the largest share of the SOI market in 2017. Soitec (France) developed the smart cut technology in collaboration with CEA-Leti (microelectronics research lab). The licensing of Soitec's Smartcut™ technology to other companies is anticipated to further increase the SOI wafer supply.

Soitec, the world's leading provider of SOI wafers, has been pioneering the SOI technology. This company accounted for more than 69% of the revenues of the world SOI wafers market in 2017. The other key participants in the SOI wafer market are SunEdison (acquired by Globalwafers Co., Ltd. in 2016), Shin-Etsu Handotai Co. Ltd. and a few others like SUMCO CORPORATION, Ultrasil Corporation and etc.

Manufacturer are focusing on strategies such as new product launches, expansions, contracts, and collaborations to enhance their product offerings and expand their business.

The computing and mobile segment accounted for the largest share of the overall SOI market in 2017. Power consumption is one of the burning issues faced by the consumer electronics segment. There are various issues associated with the conventional bulk CMOS technology, such as slow processing speed, high power consumption, low battery life, and soft errors such as data loss caused due to cosmic rays and natural radioactive background signals. The SOI microchip overcomes all these issues and improves the processing speed and performance by up to 30% compared with the CMOS-based chips; it also reduces the power consumption by up to 80%. These features make it ideal for use in computers and cell phones.

Asia-Pacific is predicted to witness the fastest growth over the forecast period owing developing integrated circuit industry. The leading players are emphasizing on modernizing their plants in APAC and fab facilities with advanced technologies. The countries such as China (Taiwan included) and Japan have the largest semiconductor manufacturing base, which is further helping the SOI market grow in this region. The increase in production facilities, rising demand for consumer electronics products, and continuous upgradation and improved efficiency of fab facilities are the key factors driving the growth of the SOI market in APAC.

The key factors restraining the growth of the SOI market are the lack of available IP ecosystem and the floating body effect. The floating body effect is one of the major drawbacks of the SOI devices. It is the dependence of body potential on the history of

biasing.

Over the next five years, LPI(LP Information) projects that Silicon-on-Insulator (SOI) will register a 17.5% CAGR in terms of revenue, reach US\$ 1320 million by 2023, from US\$ 500 million in 2017.

This report presents a comprehensive overview, market shares, and growth opportunities of Silicon-on-Insulator (SOI) market by product type, application, key manufacturers and key regions.

To calculate the market size, LP Information considers value and volume generated from the sales of the following segments:

Segmentation by product type:

300 mm SOI

Small Diameters

Segmentation by application:

Automobile and Smart Industry

Consumer Electronic

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Spain

Middle East & Africa

Egypt

South Africa

Israel

Turkey

## GCC Countries

The report also presents the market competition landscape and a corresponding detailed analysis of the major vendor/manufacturers in the market. The key manufacturers covered in this report:

Soitec SA

Shin-Etsu Chemical

SunEdison

In addition, this report discusses the key drivers influencing market growth, opportunities, the challenges and the risks faced by key manufacturers and the market as a whole. It also analyzes key emerging trends and their impact on present and future development.

## RESEARCH OBJECTIVES

To study and analyze the global Silicon-on-Insulator (SOI) consumption (value & volume) by key regions/countries, product type and application, history data from 2013 to 2017, and forecast to 2023.

To understand the structure of Silicon-on-Insulator (SOI) market by identifying its various subsegments.

Focuses on the key global Silicon-on-Insulator (SOI) manufacturers, to define, describe and analyze the sales volume, value, market share, market competition landscape, SWOT analysis and development plans in next few years.

To analyze the Silicon-on-Insulator (SOI) with respect to individual growth trends, future prospects, and their contribution to the total market.

To share detailed information about the key factors influencing the growth of the market (growth potential, opportunities, drivers, industry-specific challenges and risks).

To project the consumption of Silicon-on-Insulator (SOI) submarkets, with respect to key regions (along with their respective key countries).

To analyze competitive developments such as expansions, agreements, new product launches, and acquisitions in the market.

To strategically profile the key players and comprehensively analyze their growth strategies.

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