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Global Semiconductor Physics IP Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Semiconductor Physics IP market size is predicted to grow from US$ 1323 million in 2025 to US$ 2612 million in 2032; it is expected to grow at a CAGR of 10.2% from 2026 to 2032.

Semiconductor Physical IP, also referred to as Semiconductor Foundation IP, refers to licensable silicon-proven building blocks that are tightly coupled with specific semiconductor process nodes and foundry platforms. Typical products include standard cell libraries, embedded memory compilers, I/O and GPIO libraries, ESD protection cells, eFuse, OTP, MTP, embedded NVM, PVT sensors, and selected process-dependent hard macros. These IP blocks provide the physical foundation for SoCs, ASICs, MCUs, AI chips, automotive semiconductors, communication chips, and industrial control ICs, helping design teams optimize area, power, performance, reliability, yield, and tape-out risk. Compared with processor IP or interface protocol IP, physical IP is less application-specific but more fundamental, acting as the underlying design infrastructure that enables a chip to be reliably implemented on a target process technology.

The unique value of semiconductor physical IP lies in its ability to productize, standardize, and silicon-validate the most fundamental and process-dependent building blocks in chip design. For chip design companies, standard cell libraries, memory compilers, I/O cells, ESD protection, eNVM, and PVT sensors may not directly define end-product differentiation, but they determine whether a chip can be reliably implemented, taped out successfully, and optimized for power, performance, area, yield, and reliability. As advanced-node development costs rise, SoC integration becomes more complex, and automotive and industrial chips demand higher long-term reliability, it is increasingly difficult for design teams to build all foundation libraries and hard

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macros internally. Proven physical IP has therefore become a critical tool for reducing design risk, shortening development cycles, and improving first-pass silicon success.

The global semiconductor physical IP market is characterized by a structure in which international platform vendors lead, foundry ecosystems play a central role, and regional specialists continue to fill important technology gaps. Companies such as Synopsys, Cadence, and Silvaco hold strong positions through long-standing foundry alignment, silicon-proven assets, and broad IP portfolios. Taiwan-based suppliers such as M31, Faraday, and eMemory benefit from close proximity to foundry and ASIC service ecosystems, with strengths in memory compilers, I/O, and embedded NVM. In Mainland China, companies such as VeriSilicon, Actt are gaining relevance as local chip design, specialty processes, and domestic semiconductor ecosystems expand. Competition is not defined only by the number of IP blocks offered, but also by process coverage, silicon validation history, customer trust, and long-term support capability. Smaller suppliers can still build defensible positions by focusing on low-power memory, eNVM, ESD/I/O, or specialty process libraries.

Looking forward, growth in semiconductor physical IP will be driven by the parallel expansion of advanced nodes and mature specialty processes. AI accelerators, data-center ASICs, automotive SoCs, and high-performance computing platforms will continue to require high-density standard cells, high-performance SRAM, and low-power hard macros at advanced nodes. At the same time, MCUs, mixed-signal ICs, industrial control chips, automotive electronics, and IoT devices will continue to rely heavily on mature and specialty processes, supporting demand for highly reliable, low-leakage, embedded NVM, and automotive-grade physical IP. Compared with processor IP or high-speed interface IP, physical IP is closer to an infrastructure asset within the semiconductor value chain. Its commercial relevance is less dependent on a single end-market cycle and more closely tied to the long-term rise of chip design complexity, process platform diversification, and regional supply-chain localization.

LPI (LP Information)' newest research report, the “Semiconductor Physics IP Industry Forecast” looks at past sales and reviews total world Semiconductor Physics IP sales in 2025, providing a comprehensive analysis by region and market sector of projected Semiconductor Physics IP sales for 2026 through 2032. With Semiconductor Physics IP sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Semiconductor Physics IP industry.

This Insight Report provides a comprehensive analysis of the global Semiconductor

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Physics IP landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Semiconductor Physics IP portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Semiconductor Physics IP market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Semiconductor Physics IP and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Semiconductor Physics IP.

This report presents a comprehensive overview, market shares, and growth opportunities of Semiconductor Physics IP market by product type, application, key players and key regions and countries.

Segmentation by Type:

SRAM Compiler IP

ROM Compiler IP

Others

Segmentation by Delivery Form:

Soft IP

Hard IP

Others

Segmentation by Licensing Model:

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Subscription

Buyout

Segmentation by Application:

IDM

Wafer Foundry

Fabless

OSAT

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

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India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Synopsys

Cadence

Silvaco Group, Inc.

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Dolphin Technology, Inc.

NSCore, Inc.

sureCore Ltd.

DXCorr Design Inc.

Agile Analog Ltd.

Sofics BV

M31 Technology

Faraday

eMemory Technology

VeriSilicon

Chengdu Analog Circuit Technology Inc.

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Semiconductor Physics IP Market Size (2021-2032)
  2.1.2 Semiconductor Physics IP Market Size CAGR by Region (2021 VS 2025 VS 2032)
  2.1.3 World Current & Future Analysis for Semiconductor Physics IP by Country/Region (2021, 2025 & 2032)
2.2 Semiconductor Physics IP Segment by Type
  2.2.1 SRAM Compiler IP
  2.2.2 ROM Compiler IP
  2.2.3 Others
  2.2.4 Semiconductor Physics IP Market Size by Type
    2.2.4.1 Semiconductor Physics IP Market Size CAGR by Type (2021 VS 2025 VS 2032)
    2.2.4.2 Global Semiconductor Physics IP Market Size Market Share by Type (2021-2026)
2.3 Semiconductor Physics IP Segment by Delivery Form
  2.3.1 Soft IP
  2.3.2 Hard IP
  2.3.3 Others
  2.3.4 Semiconductor Physics IP Market Size by Delivery Form
    2.3.4.1 Semiconductor Physics IP Market Size CAGR by Delivery Form (2021 VS 2025 VS 2032)
    2.3.4.2 Global Semiconductor Physics IP Market Size Market Share by Delivery Form (2021-2026)

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2.4 Semiconductor Physics IP Segment by Licensing Model
2.4.1 Subscription
2.4.2 Buyout
2.4.3 Semiconductor Physics IP Market Size by Licensing Model
2.4.3.1 Semiconductor Physics IP Market Size CAGR by Licensing Model (2021 VS 2025 VS 2032)
2.4.3.2 Global Semiconductor Physics IP Market Size Market Share by Licensing Model (2021-2026)
2.5 Semiconductor Physics IP Segment by Application
2.5.1 IDM
2.5.2 Wafer Foundry
2.5.3 Fabless
2.5.4 OSAT
2.5.5 Semiconductor Physics IP Market Size by Application
2.5.5.1 Semiconductor Physics IP Market Size CAGR by Application (2021 VS 2025 VS 2032)
2.5.5.2 Global Semiconductor Physics IP Market Size Market Share by Application (2021-2026)

3 SEMICONDUCTOR PHYSICS IP MARKET SIZE BY PLAYER

3.1 Semiconductor Physics IP Market Size Market Share by Player
3.1.1 Global Semiconductor Physics IP Revenue by Player (2021-2026)
3.1.2 Global Semiconductor Physics IP Revenue Market Share by Player (2021-2026)
3.2 Global Semiconductor Physics IP Key Players Head office and Products Offered
3.3 Market Concentration Rate Analysis
3.3.1 Competition Landscape Analysis
3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.4 New Products and Potential Entrants
3.5 Mergers & Acquisitions, Expansion

4 SEMICONDUCTOR PHYSICS IP BY REGION

4.1 Semiconductor Physics IP Market Size by Region (2021-2026)
4.2 Global Semiconductor Physics IP Annual Revenue by Country/Region (2021-2026)
4.3 Americas Semiconductor Physics IP Market Size Growth (2021-2026)
4.4 APAC Semiconductor Physics IP Market Size Growth (2021-2026)
4.5 Europe Semiconductor Physics IP Market Size Growth (2021-2026)
4.6 Middle East & Africa Semiconductor Physics IP Market Size Growth (2021-2026)

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5 AMERICAS

5.1 Americas Semiconductor Physics IP Market Size by Country (2021-2026)
5.2 Americas Semiconductor Physics IP Market Size by Type (2021-2026)
5.3 Americas Semiconductor Physics IP Market Size by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Semiconductor Physics IP Market Size by Region (2021-2026)
6.2 APAC Semiconductor Physics IP Market Size by Type (2021-2026)
6.3 APAC Semiconductor Physics IP Market Size by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia

7 EUROPE

7.1 Europe Semiconductor Physics IP Market Size by Country (2021-2026)
7.2 Europe Semiconductor Physics IP Market Size by Type (2021-2026)
7.3 Europe Semiconductor Physics IP Market Size by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Semiconductor Physics IP by Region (2021-2026)
8.2 Middle East & Africa Semiconductor Physics IP Market Size by Type (2021-2026)
8.3 Middle East & Africa Semiconductor Physics IP Market Size by Application

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(2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 GLOBAL SEMICONDUCTOR PHYSICS IP MARKET FORECAST

10.1 Global Semiconductor Physics IP Forecast by Region (2027-2032)
  10.1.1 Global Semiconductor Physics IP Forecast by Region (2027-2032)
  10.1.2 Americas Semiconductor Physics IP Forecast
  10.1.3 APAC Semiconductor Physics IP Forecast
  10.1.4 Europe Semiconductor Physics IP Forecast
  10.1.5 Middle East & Africa Semiconductor Physics IP Forecast
10.2 Americas Semiconductor Physics IP Forecast by Country (2027-2032)
  10.2.1 United States Market Semiconductor Physics IP Forecast
  10.2.2 Canada Market Semiconductor Physics IP Forecast
  10.2.3 Mexico Market Semiconductor Physics IP Forecast
  10.2.4 Brazil Market Semiconductor Physics IP Forecast
10.3 APAC Semiconductor Physics IP Forecast by Region (2027-2032)
  10.3.1 China Semiconductor Physics IP Market Forecast
  10.3.2 Japan Market Semiconductor Physics IP Forecast
  10.3.3 Korea Market Semiconductor Physics IP Forecast
  10.3.4 Southeast Asia Market Semiconductor Physics IP Forecast
  10.3.5 India Market Semiconductor Physics IP Forecast
  10.3.6 Australia Market Semiconductor Physics IP Forecast
10.4 Europe Semiconductor Physics IP Forecast by Country (2027-2032)
  10.4.1 Germany Market Semiconductor Physics IP Forecast
  10.4.2 France Market Semiconductor Physics IP Forecast
  10.4.3 UK Market Semiconductor Physics IP Forecast
  10.4.4 Italy Market Semiconductor Physics IP Forecast
  10.4.5 Russia Market Semiconductor Physics IP Forecast

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10.5 Middle East & Africa Semiconductor Physics IP Forecast by Region (2027-2032)
10.5.1 Egypt Market Semiconductor Physics IP Forecast
10.5.2 South Africa Market Semiconductor Physics IP Forecast
10.5.3 Israel Market Semiconductor Physics IP Forecast
10.5.4 Turkey Market Semiconductor Physics IP Forecast
10.6 Global Semiconductor Physics IP Forecast by Type (2027-2032)
10.7 Global Semiconductor Physics IP Forecast by Application (2027-2032)
10.7.1 GCC Countries Market Semiconductor Physics IP Forecast

11 KEY PLAYERS ANALYSIS

11.1 Synopsys
11.1.1 Synopsys Company Information
11.1.2 Synopsys Semiconductor Physics IP Product Offered
11.1.3 Synopsys Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.1.4 Synopsys Main Business Overview
11.1.5 Synopsys Latest Developments
11.2 Cadence
11.2.1 Cadence Company Information
11.2.2 Cadence Semiconductor Physics IP Product Offered
11.2.3 Cadence Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.2.4 Cadence Main Business Overview
11.2.5 Cadence Latest Developments
11.3 Silvaco Group, Inc.
11.3.1 Silvaco Group, Inc. Company Information
11.3.2 Silvaco Group, Inc. Semiconductor Physics IP Product Offered
11.3.3 Silvaco Group, Inc. Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.3.4 Silvaco Group, Inc. Main Business Overview
11.3.5 Silvaco Group, Inc. Latest Developments
11.4 Dolphin Technology, Inc.
11.4.1 Dolphin Technology, Inc. Company Information
11.4.2 Dolphin Technology, Inc. Semiconductor Physics IP Product Offered
11.4.3 Dolphin Technology, Inc. Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.4.4 Dolphin Technology, Inc. Main Business Overview
11.4.5 Dolphin Technology, Inc. Latest Developments

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11.5 NSCore, Inc.
11.5.1 NSCore, Inc. Company Information
11.5.2 NSCore, Inc. Semiconductor Physics IP Product Offered
11.5.3 NSCore, Inc. Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.5.4 NSCore, Inc. Main Business Overview
11.5.5 NSCore, Inc. Latest Developments
11.6 sureCore Ltd.
11.6.1 sureCore Ltd. Company Information
11.6.2 sureCore Ltd. Semiconductor Physics IP Product Offered
11.6.3 sureCore Ltd. Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.6.4 sureCore Ltd. Main Business Overview
11.6.5 sureCore Ltd. Latest Developments
11.7 DXCorr Design Inc.
11.7.1 DXCorr Design Inc. Company Information
11.7.2 DXCorr Design Inc. Semiconductor Physics IP Product Offered
11.7.3 DXCorr Design Inc. Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.7.4 DXCorr Design Inc. Main Business Overview
11.7.5 DXCorr Design Inc. Latest Developments
11.8 Agile Analog Ltd.
11.8.1 Agile Analog Ltd. Company Information
11.8.2 Agile Analog Ltd. Semiconductor Physics IP Product Offered
11.8.3 Agile Analog Ltd. Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.8.4 Agile Analog Ltd. Main Business Overview
11.8.5 Agile Analog Ltd. Latest Developments
11.9 Sofics BV
11.9.1 Sofics BV Company Information
11.9.2 Sofics BV Semiconductor Physics IP Product Offered
11.9.3 Sofics BV Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.9.4 Sofics BV Main Business Overview
11.9.5 Sofics BV Latest Developments
11.10 M31 Technology
11.10.1 M31 Technology Company Information
11.10.2 M31 Technology Semiconductor Physics IP Product Offered
11.10.3 M31 Technology Semiconductor Physics IP Revenue, Gross Margin and

+357 96 030922
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Market Share (2021-2026)
11.10.4 M31 Technology Main Business Overview
11.10.5 M31 Technology Latest Developments
11.11 Faraday
11.11.1 Faraday Company Information
11.11.2 Faraday Semiconductor Physics IP Product Offered
11.11.3 Faraday Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.11.4 Faraday Main Business Overview
11.11.5 Faraday Latest Developments
11.12 eMemory Technology
11.12.1 eMemory Technology Company Information
11.12.2 eMemory Technology Semiconductor Physics IP Product Offered
11.12.3 eMemory Technology Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.12.4 eMemory Technology Main Business Overview
11.12.5 eMemory Technology Latest Developments
11.13 VeriSilicon
11.13.1 VeriSilicon Company Information
11.13.2 VeriSilicon Semiconductor Physics IP Product Offered
11.13.3 VeriSilicon Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.13.4 VeriSilicon Main Business Overview
11.13.5 VeriSilicon Latest Developments
11.14 Chengdu Analog Circuit Technology Inc.
11.14.1 Chengdu Analog Circuit Technology Inc. Company Information
11.14.2 Chengdu Analog Circuit Technology Inc. Semiconductor Physics IP Product Offered
11.14.3 Chengdu Analog Circuit Technology Inc. Semiconductor Physics IP Revenue, Gross Margin and Market Share (2021-2026)
11.14.4 Chengdu Analog Circuit Technology Inc. Main Business Overview
11.14.5 Chengdu Analog Circuit Technology Inc. Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Semiconductor Physics IP Market Size CAGR by Region (2021 VS 2025 VS 2032) & ($ millions)
Table 2. Semiconductor Physics IP Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of SRAM Compiler IP
Table 4. Major Players of ROM Compiler IP
Table 5. Major Players of Others
Table 6. Semiconductor Physics IP Market Size CAGR by Type (2021 VS 2025 VS 2032) & ($ millions)
Table 7. Global Semiconductor Physics IP Market Size by Type (2021-2026) & ($ millions)
Table 8. Global Semiconductor Physics IP Market Size Market Share by Type (2021-2026)
Table 9. Major Players of Soft IP
Table 10. Major Players of Hard IP
Table 11. Major Players of Others
Table 12. Semiconductor Physics IP Market Size CAGR by Delivery Form (2021 VS 2025 VS 2032) & ($ millions)
Table 13. Global Semiconductor Physics IP Market Size by Delivery Form (2021-2026) & ($ millions)
Table 14. Global Semiconductor Physics IP Market Size Market Share by Delivery Form (2021-2026)
Table 15. Major Players of Subscription
Table 16. Major Players of Buyout
Table 17. Semiconductor Physics IP Market Size CAGR by Licensing Model (2021 VS 2025 VS 2032) & ($ millions)
Table 18. Global Semiconductor Physics IP Market Size by Licensing Model (2021-2026) & ($ millions)
Table 19. Global Semiconductor Physics IP Market Size Market Share by Licensing Model (2021-2026)
Table 20. Semiconductor Physics IP Market Size CAGR by Application (2021 VS 2025 VS 2032) & ($ millions)
Table 21. Global Semiconductor Physics IP Market Size by Application (2021-2026) & ($ millions)
Table 22. Global Semiconductor Physics IP Market Size Market Share by Application

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(2021-2026)
Table 23. Global Semiconductor Physics IP Revenue by Player (2021-2026) & ($ millions)
Table 24. Global Semiconductor Physics IP Revenue Market Share by Player (2021-2026)
Table 25. Semiconductor Physics IP Key Players Head office and Products Offered
Table 26. Semiconductor Physics IP Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 27. New Products and Potential Entrants
Table 28. Mergers & Acquisitions, Expansion
Table 29. Global Semiconductor Physics IP Market Size by Region (2021-2026) & ($ millions)
Table 30. Global Semiconductor Physics IP Market Size Market Share by Region (2021-2026)
Table 31. Global Semiconductor Physics IP Revenue by Country/Region (2021-2026) & ($ millions)
Table 32. Global Semiconductor Physics IP Revenue Market Share by Country/Region (2021-2026)
Table 33. Americas Semiconductor Physics IP Market Size by Country (2021-2026) & ($ millions)
Table 34. Americas Semiconductor Physics IP Market Size Market Share by Country (2021-2026)
Table 35. Americas Semiconductor Physics IP Market Size by Type (2021-2026) & ($ millions)
Table 36. Americas Semiconductor Physics IP Market Size Market Share by Type (2021-2026)
Table 37. Americas Semiconductor Physics IP Market Size by Application (2021-2026) & ($ millions)
Table 38. Americas Semiconductor Physics IP Market Size Market Share by Application (2021-2026)
Table 39. APAC Semiconductor Physics IP Market Size by Region (2021-2026) & ($ millions)
Table 40. APAC Semiconductor Physics IP Market Size Market Share by Region (2021-2026)
Table 41. APAC Semiconductor Physics IP Market Size by Type (2021-2026) & ($ millions)
Table 42. APAC Semiconductor Physics IP Market Size by Application (2021-2026) & ($ millions)
Table 43. Europe Semiconductor Physics IP Market Size by Country (2021-2026) & ($

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millions)
Table 44. Europe Semiconductor Physics IP Market Size Market Share by Country (2021-2026)
Table 45. Europe Semiconductor Physics IP Market Size by Type (2021-2026) & ($ millions)
Table 46. Europe Semiconductor Physics IP Market Size by Application (2021-2026) & ($ millions)
Table 47. Middle East & Africa Semiconductor Physics IP Market Size by Region (2021-2026) & ($ millions)
Table 48. Middle East & Africa Semiconductor Physics IP Market Size by Type (2021-2026) & ($ millions)
Table 49. Middle East & Africa Semiconductor Physics IP Market Size by Application (2021-2026) & ($ millions)
Table 50. Key Market Drivers & Growth Opportunities of Semiconductor Physics IP
Table 51. Key Market Challenges & Risks of Semiconductor Physics IP
Table 52. Key Industry Trends of Semiconductor Physics IP
Table 53. Global Semiconductor Physics IP Market Size Forecast by Region (2027-2032) & ($ millions)
Table 54. Global Semiconductor Physics IP Market Size Market Share Forecast by Region (2027-2032)
Table 55. Global Semiconductor Physics IP Market Size Forecast by Type (2027-2032) & ($ millions)
Table 56. Global Semiconductor Physics IP Market Size Forecast by Application (2027-2032) & ($ millions)
Table 57. Synopsys Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 58. Synopsys Semiconductor Physics IP Product Offered
Table 59. Synopsys Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 60. Synopsys Main Business
Table 61. Synopsys Latest Developments
Table 62. Cadence Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 63. Cadence Semiconductor Physics IP Product Offered
Table 64. Cadence Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 65. Cadence Main Business
Table 66. Cadence Latest Developments
Table 67. Silvaco Group, Inc. Details, Company Type, Semiconductor Physics IP Area

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Served and Its Competitors
Table 68. Silvaco Group, Inc. Semiconductor Physics IP Product Offered
Table 69. Silvaco Group, Inc. Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 70. Silvaco Group, Inc. Main Business
Table 71. Silvaco Group, Inc. Latest Developments
Table 72. Dolphin Technology, Inc. Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 73. Dolphin Technology, Inc. Semiconductor Physics IP Product Offered
Table 74. Dolphin Technology, Inc. Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 75. Dolphin Technology, Inc. Main Business
Table 76. Dolphin Technology, Inc. Latest Developments
Table 77. NSCore, Inc. Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 78. NSCore, Inc. Semiconductor Physics IP Product Offered
Table 79. NSCore, Inc. Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 80. NSCore, Inc. Main Business
Table 81. NSCore, Inc. Latest Developments
Table 82. sureCore Ltd. Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 83. sureCore Ltd. Semiconductor Physics IP Product Offered
Table 84. sureCore Ltd. Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 85. sureCore Ltd. Main Business
Table 86. sureCore Ltd. Latest Developments
Table 87. DXCorr Design Inc. Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 88. DXCorr Design Inc. Semiconductor Physics IP Product Offered
Table 89. DXCorr Design Inc. Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 90. DXCorr Design Inc. Main Business
Table 91. DXCorr Design Inc. Latest Developments
Table 92. Agile Analog Ltd. Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 93. Agile Analog Ltd. Semiconductor Physics IP Product Offered
Table 94. Agile Analog Ltd. Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 95. Agile Analog Ltd. Main Business
Table 96. Agile Analog Ltd. Latest Developments
Table 97. Sofics BV Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 98. Sofics BV Semiconductor Physics IP Product Offered
Table 99. Sofics BV Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 100. Sofics BV Main Business
Table 101. Sofics BV Latest Developments
Table 102. M31 Technology Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 103. M31 Technology Semiconductor Physics IP Product Offered
Table 104. M31 Technology Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 105. M31 Technology Main Business
Table 106. M31 Technology Latest Developments
Table 107. Faraday Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 108. Faraday Semiconductor Physics IP Product Offered
Table 109. Faraday Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 110. Faraday Main Business
Table 111. Faraday Latest Developments
Table 112. eMemory Technology Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 113. eMemory Technology Semiconductor Physics IP Product Offered
Table 114. eMemory Technology Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 115. eMemory Technology Main Business
Table 116. eMemory Technology Latest Developments
Table 117. VeriSilicon Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors
Table 118. VeriSilicon Semiconductor Physics IP Product Offered
Table 119. VeriSilicon Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 120. VeriSilicon Main Business
Table 121. VeriSilicon Latest Developments
Table 122. Chengdu Analog Circuit Technology Inc. Details, Company Type, Semiconductor Physics IP Area Served and Its Competitors

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Table 123. Chengdu Analog Circuit Technology Inc. Semiconductor Physics IP Product Offered
Table 124. Chengdu Analog Circuit Technology Inc. Semiconductor Physics IP Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 125. Chengdu Analog Circuit Technology Inc. Main Business
Table 126. Chengdu Analog Circuit Technology Inc. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Semiconductor Physics IP Report Years Considered
Figure 2. Research Objectives
Figure 3. Research Methodology
Figure 4. Research Process and Data Source
Figure 5. Global Semiconductor Physics IP Market Size Growth Rate (2021-2032) ($ millions)
Figure 6. Semiconductor Physics IP Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 7. Semiconductor Physics IP Sales Market Share by Country/Region (2025)
Figure 8. Semiconductor Physics IP Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 9. Global Semiconductor Physics IP Market Size Market Share by Type in 2025
Figure 10. Global Semiconductor Physics IP Market Size Market Share by Delivery Form in 2025
Figure 11. Global Semiconductor Physics IP Market Size Market Share by Licensing Model in 2025
Figure 12. Semiconductor Physics IP in IDM
Figure 13. Global Semiconductor Physics IP Market: IDM (2021-2026) & ($ millions)
Figure 14. Semiconductor Physics IP in Wafer Foundry
Figure 15. Global Semiconductor Physics IP Market: Wafer Foundry (2021-2026) & ($ millions)
Figure 16. Semiconductor Physics IP in Fabless
Figure 17. Global Semiconductor Physics IP Market: Fabless (2021-2026) & ($ millions)
Figure 18. Semiconductor Physics IP in OSAT
Figure 19. Global Semiconductor Physics IP Market: OSAT (2021-2026) & ($ millions)
Figure 20. Global Semiconductor Physics IP Market Size Market Share by Application in 2025
Figure 21. Global Semiconductor Physics IP Revenue Market Share by Player in 2025
Figure 22. Global Semiconductor Physics IP Market Size Market Share by Region (2021-2026)
Figure 23. Americas Semiconductor Physics IP Market Size 2021-2026 ($ millions)
Figure 24. APAC Semiconductor Physics IP Market Size 2021-2026 ($ millions)
Figure 25. Europe Semiconductor Physics IP Market Size 2021-2026 ($ millions)
Figure 26. Middle East & Africa Semiconductor Physics IP Market Size 2021-2026 ($ millions)

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Figure 27. Americas Semiconductor Physics IP Value Market Share by Country in 2025
Figure 28. United States Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 29. Canada Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 30. Mexico Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 31. Brazil Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 32. APAC Semiconductor Physics IP Market Size Market Share by Region in 2025
Figure 33. APAC Semiconductor Physics IP Market Size Market Share by Type (2021-2026)
Figure 34. APAC Semiconductor Physics IP Market Size Market Share by Application (2021-2026)
Figure 35. China Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 36. Japan Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 37. South Korea Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 38. Southeast Asia Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 39. India Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 40. Australia Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 41. Europe Semiconductor Physics IP Market Size Market Share by Country in 2025
Figure 42. Europe Semiconductor Physics IP Market Size Market Share by Type (2021-2026)
Figure 43. Europe Semiconductor Physics IP Market Size Market Share by Application (2021-2026)
Figure 44. Germany Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 45. France Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 46. UK Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 47. Italy Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 48. Russia Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 49. Middle East & Africa Semiconductor Physics IP Market Size Market Share by Region (2021-2026)
Figure 50. Middle East & Africa Semiconductor Physics IP Market Size Market Share by

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Type (2021-2026)
Figure 51. Middle East & Africa Semiconductor Physics IP Market Size Market Share by Application (2021-2026)
Figure 52. Egypt Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 53. South Africa Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 54. Israel Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 55. Turkey Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 56. GCC Countries Semiconductor Physics IP Market Size Growth 2021-2026 ($ millions)
Figure 57. Americas Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 58. APAC Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 59. Europe Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 60. Middle East & Africa Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 61. United States Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 62. Canada Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 63. Mexico Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 64. Brazil Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 65. China Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 66. Japan Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 67. Korea Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 68. Southeast Asia Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 69. India Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 70. Australia Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 71. Germany Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 72. France Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 73. UK Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 74. Italy Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 75. Russia Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 76. Egypt Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 77. South Africa Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 78. Israel Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 79. Turkey Semiconductor Physics IP Market Size 2027-2032 ($ millions)
Figure 80. Global Semiconductor Physics IP Market Size Market Share Forecast by Type (2027-2032)
Figure 81. Global Semiconductor Physics IP Market Size Market Share Forecast by Application (2027-2032)

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Figure 82. GCC Countries Semiconductor Physics IP Market Size 2027-2032 ($ millions)

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