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China Semiconductor Industry Report, 2014-2015

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Abstracts

The report covers the followings:

1. Global Semiconductor Market and Industry;
2. China Semiconductor Market and Industry;
3. Eleven Chinese IC Design Companies
4. Five Chinese Foundries
5. Four Chinese Packaging and Testing Companies

According to China Semiconductor Industry Association, the total value of the entire semiconductor industry chain exceeded RMB300 billion in 2014, of which only RMB104.7 billion or one-third was concerned with products (excluding foreign companies). The IC export volume is still optimistic in a relative sense, but it is mostly contributed by foreign companies in China, rather than local enterprises.

Without foreign companies, Taiwanese enterprises and software business, Chinese semiconductor industryturns to be a real pattern like this: the output value of China semiconductor industry approximated USD12.5 billion in 2014, of which USD5 billion came from IC design, USD3.7 billion from IC fabrication, USD3.8 billion from IC packaging and testing. Apparently, IC design accounted for a higher proportion, in fact, the foundries of IC design companies mainly referred to Taiwanese TSMC or UMC, especially large IC design companies; about 80% of wafers were produced by Taiwanese TSMC. This means the irrelevance between IC design companies and foundries in Mainland China.

Since 2014, Chinese financial institutions or enterprises which are adept at capital operation and have huge capitalhave acquired semiconductor companies worldwide vigorously. China is trying to expand its semiconductor industry rapidly through acquisitions. However, the semiconductor industry requires long-term accumulation of

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talents and technologies, the semiconductor industry of China still has a long way to go even if it renders capital operation.

Chinese government makes great efforts to support the memory sector of the semiconductor industry with the investment of at least USD10 billion, because China is the largest memory market and buys 75% of the global memory. If the global memory industry structure remains stable, China will import tens of billions in USD of memory each year.

Most of Chinese IC design companies rely on their powerful parent companies which are partly state-owned enterprises with dominating positions and non-market-oriented operation to thrive and almost no independent IC design companies exist. For example, the parent company of Nari Smart-chip Microelectronics is a subsidiary of State Grid with main products - smart meter IC and a monopoly position. The parent company of CEC Huada is China Electronics Corporation (CEC) which monopolizes the ID card-use IC market. Non-state-owned large enterprises Huawei, ZTE, Datang Telecom (with TD-SCDMA technology) and SMIC Microelectronics act as the backers of Hisilicon, ZXIC, Leadcore Technology and Galaxycore respectively.

Independent IC design companies include Spreadtrum, RDA, Rockchip and Allwinner Technology. Spreadtrum and RDA which need a lot of money but hold limited financing channels have been acquired by state-owned enterprises. Major shareholders and technology sources of Goodix and FocalTech are actually Taiwanese companies.

In Mainland China, IC design companies are highly dependent on mobile phone and tablet PC markets. Some companies are even completely dependent on the smart card market, such as Nari Smart-chip Microelectronics, Fudan Microelectronics and Hua Hong Integrated Circuit.

Taiwanese IC design companies which are mostly independent firms are superior in technology to their counterparts in Mainland China; even if some Taiwanese companies relied on the parent companies at early stages, they have become dependent slowly, such as Himax and Novatek. Taiwanese IC design companies largely rely on the upstream industry chain instead of the downstream. Five of Taiwan's top 18 IC design companies focus on LCD driver because Taiwan's LCD panel industry ranks first in the world by shipment. In Chinese Mainland, IC design companies specialize in the digital field except RDA; in contrast, there are many Analog and Mixed IC design companies as well as two high-tech ASIC design companies of a certain scale in Taiwan.

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Contents

1 GLOBAL SEMICONDUCTOR INDUSTRY

1.1 Global Overview
1.2 Supply Chain
1.3 Semiconductor Industry Overview
1.4 Semiconductor Testing
1.5 Ranking of Global Packaging and Testing Companies
1.6 Scale of Foundry Industry

2 DOWNSTREAM MARKETS OF SEMICONDUCTOR INDUSTRY

2.1 Global Memory Market
2.2 DRAM Supply and Demand
2.3 NAND Supply and Demand
2.4 Global Mobile Phone Market
2.5 Global Mobile Phone Industry
2.6 Chinese Mobile Phone Market
2.7 Laptop Computer Market
2.8 Tablet PC Market
2.9 Server Market

3 CHINA'S SEMICONDUCTOR INDUSTRY AND MARKET

3.1 IC Market
3.2 Semiconductor Industry
3.3 Government’s Policies Incentive to Semiconductor Industry
3.4 Recent M&As in Semiconductor Industry
3.5 Development Forecast for IC Industry
3.6 Development Goals of Foundries
3.7 Semiconductor Packaging and Testing Industry
3.8 Ranking of Semiconductor Packaging and Testing Companies
3.9 IC Design Industry

4 TYPICAL IC DESIGN COMPANIES IN CHINA

4.1 Hisilicon
4.2 Spreadtrum

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4.3 Datang Semiconductor
4.4 Beijing Nari Smart-chip Microelectronics Technology
4.5 Galaxycore Microelectronics
4.6 Rockchip
4.7 Allwinner Technology
4.8 Silan Microelectronics
4.9 CEC Huada Electronic Design
4.10 ZXIC
4.11 GigaDevice
4.12 SMIC Microelectronics
4.13 RDA Microelectronics

5 FOUNDRIES

5.1 SMIC
5.2 HHGrace
5.3 Huali Microelectronics
5.4 XMC
5.5 ASMC

6 SEMICONDUCTOR PACKAGING AND TESTING COMPANIES

6.1 JCET
6.2 Nantong Fujitsu Microelectronics
6.3 Tianshui Huatian Technology
6.4 China Wafer Level CSP

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Selected Charts

SELECTED CHARTS

Global Semiconductor Market Size, 2013-2019E
Product Distribution of Global Semiconductor Market, 2013-2016E
Growth Rate of Global Semiconductor Products by Market Size, 2013-2016E
Semiconductor Outsourced Supply Chain
Semiconductor Company Systems
Semiconductor Outsourced Supply Chain Example
Food Chain IC CAD Design Industry
Top25 Semiconductor Sales Leaders, 1Q2014
Top25 Semiconductor Sales Leaders, 1Q2015
Worldwide IC Sales by Company Headquarters Location, 1990-2013
Fabless IC Sales Marketshare by Company Headquarters Location, 2013
Top 10 IC Manufacturers in China, 2008-2013
Ranking of FIQFN Vendors, 2013
Ranking of FOWLP Vendors, 2013
Ranking of Stacked Package Vendors, 2013
Ranking of Global Top 24 Packaging and Testing Companies by Revenue, 2013-2015
Operating Margin and Gross Margin of Global Major OSAT Vendors, 2013-2015
Global Foundry Market Size, 2008-2018E
Global Memory Market Size, 2009-2016E
Global Memory Market by Type, 2014
Automotive Memory Market Size, 2008-2015
Automotive Memory Market by Technology, 2010-2015
DRAM Industry Capex, 2008-2015
DRAM Oversupply Ratio, 2013-2016E
DRAM Demand by Devices, 2013-2015E
DRAM GB/SystemDRAM GB/System, 2013-2015
DRAM Oversupply Ratio, Q1 2014-Q4 2016
NAND Industry Capex, 2008-2015E
Mainstream Tech-node on Typical Smartphone IC, 2011-2018E
Average IC Costs of a Mobile Phone, 2008-2016E
Frequency Bands per Mobile Handset Device, 2000-2018E
Cellular Terminal Shipment Forecast by Cellular Standard, 2000-2018E
LTE-enabled Cellular Terminal Forecast, 2011-2018E
Global Mobile Phone Shipment, 2007-2015
Global 3G/4G Mobile Phone Shipment by Region, 2011-2014

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Major Mobile Phone Vendors' Shipment, Q1 2015
Market Share of Major Mobile Phone Vendors, Q1 2015
Market Share of Major Mobile Phone OS, Q1 2015
Worldwide Smartphone Sales to End Users by Vendor, 2014
Worldwide Smartphone Sales to End Users by Operating System, 2014
Shipment of Global Top 10 Smartphone Vendors, Q1 2015
Share of Major Vendors in Chinese Smartphone Market, 2014
Share of Major Vendors in Chinese 4G Mobile Phone Market, 2014
Share of Major Vendors in Chinese Smartphone Market, Q1 2015
Laptop Computer Shipment, 2008-2015
Shipment of Global Major Laptop ODM Vendors, 2010-2014
Global Tablet PC Shipment, 2011-2016E
Shipment of Top Five Tablet Vendors, Q4 2014
Shipment, Market Share and Growth of Top Five Tablet Vendors, 2014
Global Server Market Size, 2013-2018E
Top 5 Corporate Family, Worldwide Server Systems Factory Revenue, 2013
Top 5 Corporate Family, Worldwide Server Systems Factory Revenue, Q4 2014
Market Share of Global Server Vendors, 2015
China's IC Market Size, 2011-2017E
China's IC Import Value, 2006-2014
China's IC Export Value, 2006-2014
Revenue of China IC Industry, 2008-2014
Capex of China IC Industry, 2008-2014
Ranking of Top 10 IC Design Companies in China by Revenue, 2004 vs 2014
China Foundry Sales Share of Pure-play IC Foundry Market, 2002-2018
Structure of China's IC Foundation
Size of China's Semiconductor Packaging and Testing Industry, 2009-2015
Number and Capacity of Semiconductor Packaging and Testing Enterprises in China, 2010-2014
Ranking of Top 30 IC Packaging and Testing Enterprises in China by Revenue, 2014
Top 18 IC Design Companies in Taiwan, 2014
Ranking of Top 30 IC Design Companies in China, 2013
Huawei's Revenue and Operating Margin, 2007-2015
Huawei's Selected Financial Data, 2010-2014
Huawei's Revenue by Region, 2011-2014
Huawei's Revenue by Business, 2011-2014
Spreadtrum's Revenue, 2003-2014
Selected Financial Data of Datang Semiconductor, 2014
Selected Financial Data of Leadcore Technology, 2012-2014

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Galaxycore's Revenue and Gross Margin, 2011-2014
Galaxycore's Revenue by Product, 2011-2014
Galaxycore's Revenue by Pixel, 2011-2014
Galaxycore's Product Shipment, 2011-2014
Galaxycore's Assets, Liabilities and Cash Flow, 2011-2014
Balance Sheet of Allwinner Technology, 2012-2014
Revenue and Profit of Allwinner Technology, 2012-2014
Selected Financial Indicators of Allwinner Technology, 2012-2014
Revenue of Allwinner Technology by Application, 2012-2014
Major Suppliers of Allwinner Technology, 2014
Major Suppliers of Allwinner Technology, 2013
Major Suppliers of Allwinner Technology, 2012
Major Products of Allwinner Technology
Silan's Revenue by Business, 2010-2014
GigaDevice's Product Structure
GigaDevice's Balance Sheet, 2011-2013
GigaDevice's Revenue and Operating Income, 2011-2013
GigaDevice's Cash Flow, 2011-2013
GigaDevice's Financial Indicators, 2011-2013
Distribution of GigaDevice's Clients, 2013
Distribution of GigaDevice's Suppliers, 2013
Revenue and Operating Margin of SMIC Microelectronics, 2009-2015
Revenue of SMIC Microelectronics by Business, 2009-2014
Revenue of SMIC Microelectronics by Product, 2009-2014
RDA's Product Roadmap
RDA's Main Customers
RDA's Revenue by Product
SMIC's Milestones
SMIC's Fab Capacity
SMIC's Revenue and Operating Margin, 2007-2015
SMIC's Capacity, 2008-2014
SMIC's Gross Margin, 2008-2014
SMIC's Balance Sheet, 1Q2015
SMIC's Cash Flow, 1Q2015
SMIC's Net Profit and Gross Margin, 3Q2011-1Q2015
SMIC's EBITDA, 3Q2011-1Q2015
SMIC's Utilization Rate, 3Q2011-1Q2015
SMIC's Revenue by Region, 2010-2014
SMIC's Quarterly Revenue Breakdown by Geography, 2013Q2-2015Q1

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SMIC's Revenue by Application, 2010-2014
SMIC's Quarterly Revenue Breakdown by Application, 2013Q2-2015Q1
SMIC's Revenue Breakdown by Node, 2010-2014
SMIC's Quarterly Revenue Breakdown by Node, 2013Q2-2015Q1
SMIC's Quarterly Capacity, 2013Q2-2015Q1
SMIC's Technology Migration on Application
Revenue, Gross Profit and Operating Income of Huahong Grace, 2011-2015
Revenue, Net Income and Asset-Liability Ratio of Huahong Group, 2011-2014
Revenue Breakdown of Huahong Grace by Product, 2011-2014
Revenue Breakdown of Huahong Grace by Node, 2011-2014
Capacity Utilization of Huahong Grace, 2011-2014
Revenue Breakdown of Huahong Grace by Client, 2011-2014
Revenue Breakdown of Huahong Grace by Region, 2011-2014
Revenue Breakdown of Huahong Grace by Application, 2011-2014
XMC's Roadmap
XMC's 3D IC Technology Platform
Revenue and Gross Margin of Shanghai Advanced Semiconductor Manufacturing, 2008-2015
ASMC's Revenue by Application, Q2 2013-Q1 2015
ASMC's Revenue by Region, Q2 2013-Q1 2015
ASMC's Revenue by Client, Q2 2013-Q1 2015
ASMC's Revenue by Fab, Q2 2013-Q1 2015
ASMC's UTILRate (%), Q2 2013-Q1 2015
JCET's Revenue and Operating Margin, 2006-2015
JCET's Output, 2011-2014
JCET's CHIP Packaging Cost Structure, 2012-2013
JCET's Revenue by Product, 2013-2014
Global CU Pilluar Capacity Distribution, 2012
JCET's Assets and Liabilities, 2009-2014
JCET's Quarterly Revenue, Q1 2007-Q1 2015
JCET's Quarterly Net Income, Q1 2007-Q1 2015
Revenue and Profit of JCET's Major Subsidiaries, 2013-2014
JCET's Roadmap
Revenue and Operating Income of Nantong Fujitsu Microelectronics, 2007-2015
Balance Sheet of Nantong Fujitsu Microelectronics, 2012-2014
Cash Flow of Nantong Fujitsu Microelectronics, 2012-2014
Key Ratio of Nantong Fujitsu Microelectronics, 2012-2014
Revenue and Operating Margin of TianShuiHuaTian microelectronics, 2006-2015
Revenue and Operating Income of China Wafer Level CSP, 2010-2015

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Revenue of China Wafer Level CSP by Client, 2014

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