

China IC Industry Report, 2006



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China IC industry has become a focus of the global semiconductor industry. Thanks to the huge market demand, low production cost, rich human resource, stable economic development, and favorable government policies, China IC industry has achieved a rapid development in recent years.

Presently, the production bases of notebook PC, digital camera, and other IT products are shifting to China in a large scale. China has become a global production base of IT products. As advantages still exist in terms of production such as skilled workers, R&D talents, land, and capital etc, China will still be the first choice of foreign investment in the new round of shifting of the global manufacturing industry.

A harmonious development pattern of IC design industry, chip manufacturing industry and packaging & testing industry has taken its initial shape in China IC industry. Three concentrative industrial regions of Yangtze River Delta, Pearl River Delta and Bohai Bay Rim Region have formed, in which many IC industrialization bases have been set up. Over 90% sales revenue of China IC industry come from the above three regions. Central and Western IC industry relies on the drive of some key cities, such as Xi'an, Chengdu, Changsha and Wuhan, etc. China's chip manufacturing techniques have reached international mainstream level, and design and packaging & testing technologies approach international level as well. However, China is still in a weak position in the global IC industry compared to US and Europe as a whole.

China IC industry has grown rapidly since 2000. In 2005, its sales revenue achieved RMB 380.37 billion, up by 30.8% year-on-year, much higher than the growth rate of 8% of the global semiconductor industry in the same period. China had become the largest region of the global IC market and shared 21% sales revenue in 2005.

Since 2005, the structure of China IC industry tends to be rational, the proportion of packaging & testing industry in the whole IC industry chain decreases to 50%, while the proportions of IC design industry and IC manufacturing industry increase continuously due to fast development. In 2005, IC packaging & testing industry, IC design industry and IC manufacturing industry in China increased by 20.3%, 60.8% and 54.5% respectively year-on-year. Besides, in the whole industry chain, the output value of packaging & testing industry accounted for 45.3%, IC design industry 17% and IC manufacture industry 33%. Although IC packaging & testing industry still ranks first in the IC industry chain, the structures of the three industries have been gradually approaching foreign advanced standards, and the industrial structure tends to be rational.

Regarding policies, the Eleventh Five-Year Plan (2006-2010) has clarified to accelerate the development of key industries such as IC, software, key components, etc and tries to provide a most favorable development environment for the IC industry, and is likely to issue more favorable policies in the future.

The position of China's IT production bases and the great development momentum of electronic information product manufacturing industry guarantee that the upstream IC products own a broad market potential and will boost the IC market to keep the rapid development steps as well.

The booming development of China's domestic IC industry greatly attracts the attention of venture capitals. In recent years, 10 more semiconductor enterprises such as Hangzhou Silan IC Co., Jiangsu Changjiang Electronics Technology Co., SMIC, and CSMC Technologies Corporation, etc have gone public

successively. Taking 2004 for example, according to statistics, the venture capital in domestic IC industry achieved USD 424 million, which mainly focuses on IC design field, and over 30 IC design enterprises had acquired investment of USD 353 million in total. Meanwhile, the related fields of IC industry chain attract some attention as well. China's IC industry is full of business opportunities, high return could be expected for investment companies.

The global IC industry will enter a new round of booming period since 2006. Along with the continuous launch of new technologies and products, it also will enter a steady development period, whose fluctuation will be much smaller compared to the past five years. So, a promising and bright future can be expected for China IC industry in the future.

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