Global and China Automotive Semiconductor Industry Report, 2014-2015

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Abstracts

Global and China Automotive Semiconductor Industry Report, 2014-2015 mainly focuses on the following:

1. Global automotive market and industry;
2. China’s automotive market and industry;
3. Automotive semiconductor industry and market;
4. Fifteen major automotive semiconductor companies

In 2014, the global automotive semiconductor market size approximated USD28 billion, up 7.3% from 2013. It is predicted that in 2015 the market size will amount to USD29.6 billion, up 5.7% from a year earlier, and that by 2016 the growth rate will continue to decline, to only 3.7%. That was mainly attributed to the following two factors: first, remarkable deflation globally, which resulted in a substantial depreciation of the Japanese yen and the euro against the dollar; second, China, the world’s largest auto market, is very likely to go into decline. In 2015, China’s auto market is expected to edge up merely 1%, but may slide by 2% in 2016.

Automotive semiconductor falls into five categories: power semiconductor, sensor semiconductor, processor (main for MCU) semiconductor, ASSP (principally Connectivity and Amplifier) semiconductor, and logic semiconductor. In the field of traditional automobiles, the semiconductor costs for each unit approximate USD320, of which power occupies 26% and sensor 16%. In HEV, however, this figure is USD690, of which power represents as much as 75%. In EV, the semiconductor costs come to USD700, of which power accounts for 55%. But due to ongoing depressed oil prices, the market space of HEV/EV has been considerably squeezed. If the oil price returns back more than USD100, then the automotive semiconductor market will increase

significantly.

In 2015, the market size of automotive sensors would reach about USD4.7 billion. Automotive sensors consist of CMOS Image Sensor, Pressure, Acceleration, Speed and Position, Magnetic (Hall effect), and Angle, among which CMOS Image Sensor mainly involves ON Semiconductor and OVT. The largest pressure sensor player is Sensata, which is also the biggest auto sensor maker worldwide. Moreover, Sensata is adept at Speed and Position. As the world's second largest auto sensor company, Bosch specializes in Acceleration and Angle. ON Semiconductor is the world's third largest sensor company. Infineon, the fourth largest sensor player in the world, mainly operates Magnetic (Hall effect) and Acceleration. Allegro, the world's fifth sensor player under Sanken, is good at Magnetic (Hall effect) and Acceleration. In addition, other large auto sensor companies include Analog Devices, Melexis, Micronas, NXP, and STMicroelectronics.

In 2015, the market size of automotive processors, including MCU, DSP, and GPU, totaled some USD7 billion. In MCU market, Renesas takes absolutely the first place, with a market share of 40%, in contrast to 22% for Freescale. In the 32-Bit MCU market, Freescale accounts for the largest portion, Infineon and TI follows with 13% and 8% share, respectively. Other large players include STMicroelectronics and Spansion (Cypress).

Automotive power semiconductor mainly involves Power Management ICs, MOSFET, IGBT, and Diodes (Fast Recovery, Schottky, and High Voltage). HEV/EV needs a large quantity of IGBT, whose price is very high, thus leading to a sharp increase in costs of power semiconductor. Low-power circuit typically uses MOSFET while high-power and high-current circuit needs IGBT. SiC MOSFET is the most efficient, with high temperature resistance, far lower price than that of GaN, and more mature technology. So, it has good prospects in the future.

Automotive power semiconductor market has a low concentration, which provides a living space to some small companies. It is worth noting that to develop hybrid electric vehicle, Toyota ventured into the field of power semiconductor, so that its strength in IGBT is not inferior to specialized IGBT companies. Besides, Toyota is also not dwarfed by specialized automotive power semiconductor players in SiC MOSFET field.

Infineon, the largest automotive power semiconductor vendor, acquired IR, a move that helped bridge the gap in LV MOSFET, with the market share rising to 24%. STMicroelectronics, which specializes in Power Management, ranks second. What

+44 20 8123 2220
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comes next is Renesas, Fuji Electric, and Bosch.

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