

Global and China Foundry Industry Report, 2014-2015

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Abstracts

Global and China Foundry Industry Report, 2014-2015 highlights the followings:

1. Analysis of global semiconductor market and industry
2. Analysis of Chinese semiconductor market and industry
3. Analysis of global and China foundry industry
4. Study of 16 foundry vendors

Global foundry industry was worth about USD46.1 billion in 2014, up 18.2% from 2013, and is expected to reach USD52.8 billion in 2015, a year-on-year growth of 14.5%, and USD58.3 billion in 2016, rising by 6.4% against 2015, and increase by just 3.7% in 2017.

Substantial decline in growth rate of global foundry market in 2016 can be attributable to following aspects. First, markets for main electronic products like smartphone, tablet PC and laptop computer peaked in 2014 and has stalled or slid in 2015, with notable drop having been seen in tablet PC market. Device market lags slightly and will experience slowdown in 2016. Second, worldwide deflation and price slump of bulk commodities led by oil and iron ore may trigger a ripple effect, causing a fall in prices of semiconductor equipment. Third, global economic recovery could come to a standstill, as US Q1 GDP contracted 0.7% and China's GDP growth slowed down sharply.

Despite expansion in overall market size, for most companies, the market maybe contract after 2016. Growth comes mainly from the industry leader- TSMC. In spite of competition from Samsung, Global Foundries and even Intel, TSMC will further raise its market share.

The one that is in the most dangerous situation is Global Foundries, which is backed by UAE's sovereign fund. Prolonged low oil price is not a good thing for UAE that relies

heavily on oil, and it is inevitable that the country's fiscal revenue will go down. Global Foundries will finally become an abyss, as its losses are widening. Nearly ten billion dollar investment in Global Foundries will not be appreciated obviously. If oil price remains below USD40 for a long time, UAE's sovereign fund will surely sell Global Foundries and buyers are likely to be Chinese investors.

It was rumored recently that Chinese investors intended to acquire Global Foundries. If this became true, TSMC will have one less tough competitor. As Samsung's profit from mobile phone business drops, Memory has become main source of Samsung's profit. Moreover, Foundry makes meager profits or even losses, so Samsung will be more focused on Memory rather than Foundry. As to Intel, it has been groping in Foundry field with technologies that are the most advanced but not recognized by customers, showing that the most advanced is not necessarily the best.

It is very unlikely that Samsung will succeed in Foundry, as most of global electronics companies are direct or indirect rivals of Samsung, and no one will support its competitor for a long time. Furthermore, Samsung gets involved in legal battles with a large number of electronics companies over patent or other aspects, like patent dispute between the world's largest Graphic IC vendor NVIDIA and Samsung. NVIDIA only symbolically places orders with Samsung, but the number of orders to Samsung could be ignored, just a strategy for NVIDIA to bargain with TSMC, which is adopted by majority of electronic companies, especially during economic downturn, when they put more orders with TSMC.

In Foundry field, advanced technology doesn't always deliver good business performance. Take Global Foundries for example, technologically staying at same level with Samsung and IBM, Global Foundries recorded a widened net loss from USD900 million in 2013 to USD1.5 billion in 2015. EBITDA was much worse, down from USD1 billion in 2012 to more than USD400 million in 2014. EBITDA margin stood at only 11%, below the industry average.

Contents

1 GLOBAL SEMICONDUCTOR INDUSTRY

- 1.1 Overview of Semiconductor Market
- 1.2 Semiconductor Industry Supply Chain
- 1.3 Overview of Semiconductor Industry

2 FOUNDRY DOWNSTREAM MARKET

- 2.1 Mobile Phone Market
- 2.2 Global Mobile Phone Industry
- 2.3 Chinese Mobile Phone Market
- 2.4 Laptop Computer Market
- 2.5 Tablet PC Market
- 2.6 Server Market

3 FOUNDRY INDUSTRY

- 3.1 Industry Size
- 3.2 Industry Competition
- 3.3 Industry Ranking
- 3.4 7nm Foundry
- 3.5 Chinese IC Market
- 3.6 China Semiconductor Industry
- 3.7 Chinese Government's Supportive Policies for Semiconductor Industry
- 3.8 Recent M&As in China's Semiconductor Field
- 3.9 Forecast of China IC Industry Development
- 3.10 Development Goals of China Foundry Industry
- 3.11 China's Local Semiconductor Device Industry

4 FOUNDRY VENDORS

- 4.1 TSMC
- 4.2 UMC
- 4.3 SMIC
- 4.4 VIS
- 4.5 POWERCHIP
- 4.6 HHGRACE

- 4.7 DONGBU HITEK
- 4.8 TOWER
- 4.9 X-FAB
- 4.10 ASMC
- 4.11 Samsung
- 4.12 MAGNACHIP
- 4.13 GLOBALFOUNDRIES
- 4.14 Fujitsu
- 4.15 Huali Microelectronics
- 4.16 XMC

List Of Charts

LIST OF CHARTS

Global Semiconductor Market Size, 2013-2019E
Global Semiconductor Market Breakdown by Product, 2012-2016E
Market Size Growth of Various Semiconductor Products, 2012-2016E
Semiconductor Outsourced Supply Chain
Semiconductor Company Systems
Semiconductor Outsourced Supply Chain Example
Food Chain IC CAD Design Industry
Top25 Semiconductor Sales Leaders, 2014Q1
Top25 Semiconductor Sales Leaders, 2015Q1
Worldwide IC Sales by Company Headquarters Location, 1990-2013
Fabless IC Sales Market Share by Company Headquarters Location, 2013
Top 10 IC Manufacturers in China, 2008-2013
Mainstream Tech-node on Typical Smartphone IC, 2011-2018E
Average IC Costs Per 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
Shipments of Major Mobile Phone Vendors, 2015Q1
Market Share of Major Mobile Phone Vendors, 2015Q1
Market Share of Major Mobile Phone Operating Systems, 2015Q1
Worldwide Smartphone Sales to End Users by Vendor in 2014 (Thousands of Units)
Worldwide Smartphone Sales to End Users by Operating System in 2014 (Thousands of Units)
Shipments of Global Top10 Mobile Phone Vendors, 2014
Market Share of Major Chinese Smartphone Vendors, 2014
Market Share of Major Vendors in Chinese 4G Mobile Phone Market, 2014
Laptop Computer Shipments, 2008-2015
Shipments of Major Global Notebook PC ODM Vendors, 2010-2014
Global Tablet PC Shipments, 2011-2016E
Shipments of Top5 Tablet PC Vendors, 2014Q4
Shipments, Market Share and Growth of Top5 Tablet PC Vendors, 2014
Global Server Market Size, 2013-2018E
Worldwide Server Systems Factory Revenue of Top 5 Corporate Family, 2013
Worldwide Server Systems Factory Revenue of Top 5 Corporate Family, 2014Q4
Market Share of Global Server Vendors, 2015

Global Foundry Market Size, 2008-2017E
Global Foundry Capacity by Node, 2012-2018E
Global Foundry Revenue by Node, 2012-2018E
Global Foundry Ranking by Revenue, 2005-2014
Ranking of Global Foundries by Sales, 2005-2014
Operating Profit Margin of Major Global Foundries, 2013-2015
Chinese IC Market Size, 2011-2017E
China's IC Imports, 2006-2014
China's IC Exports, 2006-2014
Sales of China IC Industry, 2008-2014
Capex of China IC Industry, 2008-2014
Top 10 IC Design Houses in China by Sales, 2004&2014
China Foundry Sales Share of the Pure-play IC Foundry Market, 2002-2018E
China National IC Fund Structure
Organizational Structure of TSMC
Revenue, Gross Margin and Operating Margin of TSMC, 2005-2015
Wafer Shipments and Utilization of TSMC, 2012-2014
Consolidated Statement of Financial Position Data of TSMC, 2012-2014
Quarterly Revenue VS Gross Margin of TSMC, 2013Q1-2015Q1
Quarterly Revenue VS Net Margin of TSMC, 2013Q1-2015Q1
Quarterly Shipment VS Operation Margin of TSMC, 2013Q1-2015Q1
Quarterly Revenue of TSMC by Node, 2012Q1-2015Q1
Quarterly Revenue Breakdown of TSMC by Application, 2012Q1-2015Q1
Quarterly Revenue Breakdown of TSMC by Region, 2012Q1-2014Q2
Quarterly Wafer Shipments and ASP of TSMC, 2013Q1-2015Q1
Fab List of TSMC
Financial Figures of TSMC's Shanghai Factory, 2013
Revenue and Operating Margin of UMC, 2004-2015
Shipments and Capacity Utilization of UMC, 2004-2014
Quarterly Shipment VS utilization of UMC, 2013Q1-2015Q1
Quarterly Revenue and Gross Margin of UMC, 2012Q3-2015Q1
Quarterly Revenue Breakdown of UMC by Node, 2012Q3-2015Q1
Quarterly Revenue Breakdown of UMC by Region, 2012Q3-2015Q1
Quarterly Revenue Breakdown of UMC by Application, 2012Q3-2015Q1
Quarterly Capacity of UMC, 2006Q1-2015Q2
Operating Revenue Breakdown of UMC by Location of Customers, 2012-2014
Milestones of SMIC
Fab Capacity of SMIC
Revenue and Operating Margin of SMIC, 2003-2015

Capacity of SMIC, 2008-2014
Gross Margin of SMIC, 2008-2014
Balance Sheet of SMIC, 2015Q1
Cash Flow of SMIC, 2015Q1
Net Profit and Gross Margin of SMIC, 2011Q3-2015Q1
EBITDA of SMIC, 2011Q3-2015Q1
Utilization Rate of SMIC, 2011Q3-2015Q1
Revenue Breakdown of SMIC by Region, 2010-2014
Quarterly Revenue Breakdown of SMIC by Geography, 2013Q2-2015Q1
Revenue Breakdown of SMIC by Application, 2010-2014
Quarterly Revenue Breakdown of SMIC by Application, 2013Q2-2015Q1
Revenue Breakdown of SMIC by Node, 2010-2014
Quarterly Revenue Breakdown of SMIC by Node, 2013Q2-2015Q1
Quarterly Capacity of SMIC, 2013Q2-2015Q1
SMIC Technology Migration on Application
Organizational Structure of VIS
Revenue and Operating Margin of VIS, 2005-2015
Quarterly Revenue and Gross Margin of VIS, 2012Q1-2015Q1
Quarterly Revenue and Utilization Rate of VIS, 2012Q1-2015Q1
Quarterly Revenue Breakdown of VIS by Node, 2012Q4-2015Q1
Quarterly Revenue Breakdown of VIS by Application, 2012Q1-2015Q1
Quarterly Revenue Breakdown of VIS by Product, 2012Q1-2015Q1
Organizational Structure of Powerchip
Monthly Revenue of Powerchip, May 2013-May 2015
Revenue, Gross Profit and Operating Income of HHGrace, 2011-2015
Revenue, Net Income and Asset-liability Ratio of Huahong Group, 2011-2014
Revenue Breakdown of HHGrace by Product, 2011-2014
Revenue Breakdown of HHGrace by Node, 2011-2014
Capacity Utilization of HHGrace, 2011-2014
Revenue Breakdown of HHGrace by Client, 2011-2014
Revenue Breakdown of HHGrace by Region, 2011-2014
Revenue Breakdown of HHGrace by Application, 2011-2014
Revenue and Operating Margin of DongbuHiTek, 2005-2015
Fabs of DongbuHitek
Revenue and Gross Margin of TowerSemi, 2003-2015
Tower Semiconductor Shareholders Structure
Revenue and Gross Margin of ASMC, 2003-2015
Revenue Breakdown of ASMC by Application, 2013Q2-2015Q1
Revenue Breakdown of ASMC by Region, 2013Q2-2015Q1

Revenue Breakdown of ASMC by Client, 2013Q2-2015Q1
Revenue Breakdown of ASMC by Fab, 2013Q2-2015Q1
Utilization Rate of ASMC, 2013Q2-2015Q1
Revenue and Operating Margin of Samsung's System LSI Division, 2010-2015
Revenue Breakdown of Samsung's System LSI Division by Business, 2011-2015
Revenue and Gross Margin of MagnaChip, 2005-2015
Revenue and Operating Margin of MagnaChip, 2005-2015
Revenue Breakdown of MagnaChip by Product, 2004-2014
Revenue Breakdown of MagnaChip by Region, 2006-2014
Wafer Fabs of MagnaChip
Financial Figures for Global Foundries, 2012/2013
Milestones of Global Foundries
Global Footprints of Global Foundries
Revenue and Operating Margin of Fujitsu's Devices Solution, FY2006-FY2015
Roadmap of XMC
XMC's 3D IC Technology Platform

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