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Global and China IC Substrate Industry Report, 2015

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Abstracts

Global and China IC Substrate Industry Report, 2015 highlights the followings:

1. Status quo of semiconductor and IC packaging industry
2. Analysis on downstream market of IC substrate
3. Development trend of IC substrate
4. Analysis on IC substrate industry
5. Research on 12 IC substrate vendors
6. Research on 6 IC substrate peripheral companies

IC substrate industry may be in a predicament in 2015, rooted in two aspects: first, the maturing of FOWLP; second, the tablet sales decline and sluggish smartphone growth. In addition, the prosperity of IC substrate industry in 2013 stimulated large-scale expansion of enterprises in 2014, thus leading to an insufficient rate of capacity utilization.

For FC-CSP substrate with mobile phone and tablet PC as the core market facing strong competition from FOWLP that has overwhelming superiorities including low profile, higher speed, more I/O, higher integration, less processing step, especially needing no substrate which slashes cost as IC substrate accounts for more than half of the total cost of IC.

Although it is in its infancy without obvious cost advantage, FOWLP has been an irresistible trend, the traditional FC-CSP substrate will have to reduce the price to enter a competition, and the demand for the latter will be sharply reduced by more than 60% once FOWLP matures. So in 2015, FC-CSP substrate vendors have to substantially reduce the price to gain market advantage in advance. It is expected that in 2015 the IC substrate market will encounter a 7% scale-down to USD7.12 billion.

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In the downstream market, large screen mobile phone squeezed the living space of tablet PC which declined significantly. And the single-functional tablet PC is mostly used as a toy for children with less demand for replacement. In the field of smartphone, China as the world's largest smartphone market declined in 2014.

SiP packaging substrate will be the highlight for IC substrate market in 2015 as core components of high-end smart watches must adopt SiP packaging. Both the two core processors built in Apple Watch use SiP packaging technology. The most important SiP substrate of Apple Watch calls for the most difficult production, priced 4-5 times higher than FCCSP applied to general ARM processor. The orders are shared by Nanya, Kinsus and other Taiwanese vendors. ASE undertakes Apple Watch's SI chip SiP packaging business.

The PC market is also likely to recover in 2015 for tablet PC slump means the recovery of laptop computer market. Laptop computer market saw the first growth in 2014 after three consecutive years of decline and is expected to continue the trend in 2015. And laptop discrete graphics card accounts for a zooming proportion, signifying GPU shipments boost.

Another excellent performer in IC substrate applications is the memory market.

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