

# Global and China Semiconductor Equipment Industry Report, 2014-2015

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## Abstracts

Global and China Semiconductor Equipment Industry Report, 2014-2015 covers the following:

1. Global Semiconductor Market and Industry;
2. China Semiconductor Market and Industry;
3. Global and China Semiconductor Equipment Market and Industry;
4. Fifteen Semiconductor Equipment Vendors

In 2014, the global semiconductor equipment market size totaled USD38 billion, up 10.4% from 2013. It is predicted that in 2015 this figure will climb to USD40.5 billion, a rise of 6.7% from a year ago, and that the market size in 2016 will slump by 5.6% as compared to 2015. However, the possible shrinkage in 2016 might come from the following factors:

Firstly, following a peak in 2014, main electronic products such as smartphones and tablet and laptop PCs have stagnated or declined. This is particularly true of tablet PCs, which has presented a significant decline. On the other hand, equipment market delays being sluggish but will without doubt decline in 2016.

Secondly, due to the global deflation, prices for bulk commodity led by oil and iron ore plunged and would cause knock-on effect, which would in turn result in a fall in semiconductor equipment prices.

Thirdly, global economic recovery will probably come to a halt, with the US GDP dropping by 0.7% in 2015Q1. Moreover, China's GDP growth slowed obviously. The both countries constituted the major driving force of the global economy. The

stimulatory effect of US QE began to fade away, and therefore the economy might go down.

In the future, it is difficult to come up with a start product like smartphones. Thus, the prospects for the semiconductor industry remain uncertain.

In 2014, semiconductor equipment vendors made remarkable performance, with a substantial rise in operating profit, though their revenue did not increased. The merger of Applied Material and Tokyo Electron was rejected by the US Department of Commerce. In future, more of M&A plans may well be intervened by the government, after all semiconductor equipment market is a highly concentrated market.

In 2015, the Chinese semiconductor companies and institutions showed their strength, launching a series of mergers and acquisitions. The Chinese enterprises are adept in and fond of capital operation rather than industrial production. The semiconductor equipment market size in China will reach USD4.4 billion in 2015, of which the domestic companies, mostly engaged in low-end equipment, will account for just 14%.

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