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Europe Embedded Non-Volatile Memory Market Forecast to 2030 - Regional Analysis - by Product (eFlash, eE2PROM, FRAM, and Others) and Application (Consumer Electronics, Automotive, Robotics, and Others)

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Abstracts

The Europe embedded non-volatile memory market was valued at US$ 157.69 million in 2022 and is expected to reach US$ 709.69 million by 2030; it is estimated to record a CAGR of 20.7% from 2022 to 2030.

Expansion of Automotive Industry Drives Europe Embedded Non-Volatile Memory Market

The impact of modern technology has positively shaped the automotive industry. The advent of digital technology worldwide has made it possible for manufacturers to implement advanced solutions in automobiles. Today, cars are equipped with a range of sophisticated technologies for making driving safer, comfortable, and enjoyable for users, which increases the demand for embedded non-volatile memory in the automotive industry. The embedded non-volatile memory is integrated into embedded systems, which are highly used in both regular and hybrid automotive vehicles. These memories help the automotive user to store code and other data after the vehicle's system restarts. The embedded non-volatile memory is used in ADAS technology incorporated in electric and hybrid vehicles. The growing demand for electric and hybrid vehicles is driving the market. For instance, according to the International Energy Agency (IEA), electric vehicle sales increased by 10 million in 2022. Approximately 14% of all new cars sold across the globe were electric. The increasing sales of electric cars globally raises the adoption of embedded non-volatile memory among automotive manufacturers. These memories are used to store data in the absence of a power

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supply. The growing demand for embedded systems in the automotive industry is driving the Europe market. The embedded system is made up of microcontrollers that use embedded non-volatile memory for data storage. In automotive vehicles, over 100 microcontrollers are utilized, including AVR, 8051, and PIC. All these microcontrollers use embedded non-volatile memory to achieve higher performance with lower power. The microcontrollers are deployed in an embedded system to reduce overheating and the release of gases. These systems are used even in luxury automobiles to make them more network-savvy, energy-efficient, and safe to drive. The expansion of the automotive industry is fueling the embedded non-volatile memory market growth. The key players in the market are partnering to develop high-performance embedded systems used in autonomous vehicles. For instance, in May 2022, Magna International Inc. partnered with BlackBerry Limited to develop next-generation ADAS solutions for automotive original equipment manufacturers (OEMs). Magna International Inc. is leveraging BlackBerry Limited's various QNX software platforms, such as QNX Software Development Platform, QNX Platform for ADAS, and QNX OS for Safety in design engineering, systems integration, and validation and performance optimization roles. The partnership helps Magna International to develop high-performance and secure embedded systems for ADAS, autonomous driving, and infotainment systems, driving the embedded non-volatile memory market. The development of high-performance and secure embedded systems requires embedded non-volatile memory that is capable of storing data and information in the absence of a power supply is fueling the market growth.

Europe Embedded Non-Volatile Memory Market Overview

The embedded non-volatile memory market in Europe is segmented into the UK, Germany, Italy, France, Russia, and the Rest of Europe. Germany, France, the UK, and the Nordic countries are at the forefront of the regional semiconductors industry. A positive outlook toward adopting advanced technologies in manufacturing and commercial operations is driving the Europe embedded non-volatile memory market. The automotive sector-led by Germany due to the presence of well-established automotive manufacturers such as Daimler AG, VW, BMW, Porsche, Opel, and Audi-is the largest contributor to the embedded non-volatile memory market in Europe. The region comprises several major automotive manufacturing assembly and production plants. There are ~298 vehicle assembly plants across Europe. The automotive sector in Europe produced 4,371,499 and 3,581,851 units of commercial and passenger vehicles and sold 2,498,016 and 2,625,506 units in 2019 and 2020, respectively. Moreover, car manufacturers are making high investments in their EV production capabilities, which is further propelling the embedded non-volatile memory market

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growth in Europe. Europe has been rapidly embracing the Internet of Things (IoT) to maximize the overall industrial output. Moreover, a rise in the aging population in the region also creates a demand for advanced healthcare devices. The healthcare sector is developing and introducing innovative devices to meet customer demands. Advanced technologies such as IoT and AI are further creating a demand for microelectronics and electronic devices; thus, companies are expanding their footprint in the European embedded non-volatile memory market. The telecommunications sector in Europe is also experiencing a strong growth rate, with a firm establishment of 4G networks and significant growth prospects for 5G networks. According to Ericsson's mobility report, the 5G adoption in Western Europe would reach 69% of the total connectivity technology market by 2026; it would reach 33% in Central and Eastern Europe, while the LTE (4G) would account for the rest 65% by the same year. On average, 69% of the EU population uses mobile devices to access the Internet. The increasing demand for fast internet services is augmenting the growth of the telecommunications sector, thereby driving the demand for the embedded non-volatile memory market for 5G-supported electronic devices.

Europe Embedded Non-Volatile Memory Market Revenue and Forecast to 2030 (US$ Million)

Europe Embedded Non-Volatile Memory Market Segmentation

The Europe embedded non-volatile memory market is segmented based on product, application, and country. Based on product, the Europe embedded non-volatile memory market is categorized into eFlash, eE2PROM, FRAM, and others. The eFlash segment held the largest market share in 2022.

In terms of application, the Europe embedded non-volatile memory market is categorized into consumer electronics, automotive, robotics, and others. The others segment held the largest market share in 2022.

Based on country, the Europe embedded non-volatile memory market is segmented into Germany, France, the UK, Italy, Russia, and the Rest of Europe. Germany dominated the Europe embedded non-volatile memory market share in 2022.

Microchip Technology Inc, Tower Semiconductor, GlobalFoundries Inc, eMemory Technology Inc, Texas Instruments Inc, Hua Hong Semiconductor Ltd, Taiwan Semiconductor Manufacturing Co Ltd, United Microelectronics Corp, Semiconductor Manufacturing International Corp, and Synopsys Inc are some of the leading companies

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operating in the Europe embedded non-volatile memory market.

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Contents

1. INTRODUCTION

1.1 The Insight Partners Research Report Guidance
1.2 Market Segmentation

2. EXECUTIVE SUMMARY

2.1 Key Insights
2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

3.1 Coverage
3.2 Secondary Research
3.3 Primary Research

4. EUROPE EMBEDDED NON-VOLATILE MEMORY MARKET LANDSCAPE

4.1 Overview
4.2 Ecosystem Analysis
  4.2.1 List of Vendors in Value Chain:

5. EUROPE EMBEDDED NON-VOLATILE MEMORY MARKET - KEY INDUSTRY DYNAMICS

5.1 Drivers
  5.1.1 Increase in Adoption of Consumer Electronics
  5.1.2 Expansion of Automotive Industry
5.2 Restraints
  5.2.1 Global Shortage of Semiconductor Chips
5.3 Opportunities
  5.3.1 Increasing Demand in Low-Power IoT Modules
5.4 Trends
  5.4.1 Growing Investment in Commercialization of Embedded Non-Volatile Memory
5.5 Impact of Drivers and Restraints:

6. EMBEDDED NON-VOLATILE MEMORY MARKET - EUROPE MARKET ANALYSIS

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6.1 Embedded Non-Volatile Memory Market Revenue (US$ Million), 2022 - 2030
6.2 Embedded Non-Volatile Memory Market Forecast and Analysis

7. EUROPE EMBEDDED NON-VOLATILE MEMORY MARKET ANALYSIS - PRODUCT

7.1 eFlash
  7.1.1 Overview
  7.1.2 eFlash Market Revenue and Forecasts to 2030 (US$ Million)
7.2 eE2PROM
  7.2.1 Overview
  7.2.2 eE2PROM Market Revenue and Forecasts to 2030 (US$ Million)
7.3 FRAM
  7.3.1 Overview
  7.3.2 FRAM Market Revenue and Forecasts to 2030 (US$ Million)
7.4 Others
  7.4.1 Overview
  7.4.2 Others Market Revenue and Forecasts to 2030 (US$ Million)

8. EUROPE EMBEDDED NON-VOLATILE MEMORY MARKET ANALYSIS - APPLICATION

8.1 Consumer Electronics
  8.1.1 Overview
  8.1.2 Consumer Electronics Market Revenue and Forecasts to 2030 (US$ Million)
8.2 Automotive
  8.2.1 Overview
  8.2.2 Automotive Market Revenue and Forecasts to 2030 (US$ Million)
8.3 Robotics
  8.3.1 Overview
  8.3.2 Robotics Market Revenue and Forecasts to 2030 (US$ Million)
8.4 Others
  8.4.1 Overview
  8.4.2 Others Market Revenue and Forecasts to 2030 (US$ Million)

9. EUROPE EMBEDDED NON-VOLATILE MEMORY MARKET - COUNTRY ANALYSIS

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9.1 Europe
9.1.1 Europe Embedded Non-Volatile Memory Market Overview
9.1.2 Europe Embedded Non-Volatile Memory Market Revenue and Forecasts and Analysis - By Countries
9.1.2.1 Germany Embedded Non-Volatile Memory Market Revenue and Forecasts to 2030 (US$ Mn)
9.1.2.1.1 Germany Embedded Non-Volatile Memory Market Breakdown by Product
9.1.2.1.2 Germany Embedded Non-Volatile Memory Market Breakdown by Application
9.1.2.2 France Embedded Non-Volatile Memory Market Revenue and Forecasts to 2030 (US$ Mn)
9.1.2.2.1 France Embedded Non-Volatile Memory Market Breakdown by Product
9.1.2.2.2 France Embedded Non-Volatile Memory Market Breakdown by Application
9.1.2.3 UK Embedded Non-Volatile Memory Market Revenue and Forecasts to 2030 (US$ Mn)
9.1.2.3.1 UK Embedded Non-Volatile Memory Market Breakdown by Product
9.1.2.3.2 UK Embedded Non-Volatile Memory Market Breakdown by Application
9.1.2.4 Italy Embedded Non-Volatile Memory Market Revenue and Forecasts to 2030 (US$ Mn)
9.1.2.4.1 Italy Embedded Non-Volatile Memory Market Breakdown by Product
9.1.2.4.2 Italy Embedded Non-Volatile Memory Market Breakdown by Application
9.1.2.5 Russia Embedded Non-Volatile Memory Market Revenue and Forecasts to 2030 (US$ Mn)
9.1.2.5.1 Russia Embedded Non-Volatile Memory Market Breakdown by Product
9.1.2.5.2 Russia Embedded Non-Volatile Memory Market Breakdown by Application
9.1.2.6 Rest of Europe Embedded Non-Volatile Memory Market Revenue and Forecasts to 2030 (US$ Mn)
9.1.2.6.1 Rest of Europe Embedded Non-Volatile Memory Market Breakdown by Product
9.1.2.6.2 Rest of Europe Embedded Non-Volatile Memory Market Breakdown by Application

10. COMPETITIVE LANDSCAPE

10.1 Heat Map Analysis By Key Players

11. INDUSTRY LANDSCAPE

11.1 Overview

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11.2 Market Initiative
11.3 New Product Development
11.4 Merger and Acquisition

12. COMPANY PROFILES

12.1 Microchip Technology Inc
  12.1.1 Key Facts
  12.1.2 Business Description
  12.1.3 Products and Services
  12.1.4 Financial Overview
  12.1.5 SWOT Analysis
  12.1.6 Key Developments
12.2 Tower Semiconductor
  12.2.1 Key Facts
  12.2.2 Business Description
  12.2.3 Products and Services
  12.2.4 Financial Overview
  12.2.5 SWOT Analysis
  12.2.6 Key Developments
12.3 Globalfoundries Inc
  12.3.1 Key Facts
  12.3.2 Business Description
  12.3.3 Products and Services
  12.3.4 Financial Overview
  12.3.5 SWOT Analysis
  12.3.6 Key Developments
12.4 eMemory Technology Inc.
  12.4.1 Key Facts
  12.4.2 Business Description
  12.4.3 Products and Services
  12.4.4 Financial Overview
  12.4.5 SWOT Analysis
  12.4.6 Key Developments
12.5 Texas Instruments Inc
  12.5.1 Key Facts
  12.5.2 Business Description
  12.5.3 Products and Services
  12.5.4 Financial Overview

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12.5.5 SWOT Analysis
12.5.6 Key Developments
12.6 Hua Hong Semiconductor Limited
12.6.1 Key Facts
12.6.2 Business Description
12.6.3 Products and Services
12.6.4 Financial Overview
12.6.5 SWOT Analysis
12.6.6 Key Developments
12.7 Taiwan Semiconductor Manufacturing Co Ltd
12.7.1 Key Facts
12.7.2 Business Description
12.7.3 Products and Services
12.7.4 Financial Overview
12.7.5 SWOT Analysis
12.7.6 Key Developments
12.8 United Microelectronics Corp
12.8.1 Key Facts
12.8.2 Business Description
12.8.3 Products and Services
12.8.4 Financial Overview
12.8.5 SWOT Analysis
12.8.6 Key Developments
12.9 Semiconductor Manufacturing International Corp
12.9.1 Key Facts
12.9.2 Business Description
12.9.3 Products and Services
12.9.4 Financial Overview
12.9.5 SWOT Analysis
12.9.6 Key Developments
12.10 Synopsys Inc
12.10.1 Key Facts
12.10.2 Business Description
12.10.3 Products and Services
12.10.4 Financial Overview
12.10.5 SWOT Analysis
12.10.6 Key Developments

13. APPENDIX

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13.1 Word Index

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