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**News Release**

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**FREESCALE SEMICONDUCTOR DROPS TO THIRD PLACE AS INFINEON TECHNOLOGIES LEADS AUTOMOTIVE SEMICONDUCTOR RANKING IN 2009**

**London, England; May 5 2010; According to analysis by Semicast Research, Infineon Technologies was the largest supplier of semiconductors to the automotive sector in 2009. Freescale Semiconductor, for many years the leading supplier of automotive semiconductors, dropped to third place behind newly formed Renesas Electronics.**

Semicast's automotive semiconductor market share analysis ranks Infineon as the largest supplier in 2009, with long time market leader Freescale ranked third, ahead of STMicroelectronics and NXP Semiconductor. Semicast's analysis shows that most of the leading suppliers to the automotive sector lost share in 2009 with the exception of Texas Instruments and ON Semiconductor, which both recorded falling revenues but at a rate slower than the sector average.

The historical rankings in this market are altered somewhat by the creation of Renesas Electronics, which was formed on 1 April 2010 following the merger of Renesas Technology and NEC Electronics. Colin Barnden, Principal Analyst at Semicast Research and study author, commented "Presenting a combined market share for the two companies shows that Renesas Electronics has been market leader to the automotive sector for the last few years, ahead of Freescale. However Renesas Electronics' automotive activity is judged to have also been significantly impacted by the market decline in 2009, resulting in it falling into second place behind Infineon. Infineon has therefore moved from third ranked supplier to first in only two years".

The overall automotive semiconductor market is estimated to have fallen by 17% in 2009 to \$15.8 billion, the largest ever one year decline. Automotive semiconductor sales peaked in 2007 at \$20.0 billion, but fell in both 2008 and 2009 to a level now 20% below the peak. However future prospects for the auto industry look bright and Semicast forecasts growth in the automotive semiconductor market of 16% in 2010, with steady growth projected for the medium term. Automakers remain committed to the adoption of advanced electronic systems which make their vehicles more environmentally friendly, safer to drive and more pleasurable to travel in. The advanced capabilities of these systems are made possible by the rising adoption of ever faster, more powerful semiconductors. It is apparent that the ability of automakers to comply with more stringent safety and environmental legislation and to satisfy the expectations of the driver and passengers is dependent on ever increasing use of semiconductors. Looking to the future, as

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confidence grows and consumers return to buying new cars, so Semicast forecasts that the automotive semiconductor market will revert to steady growth.

### Market Share Estimates for Semiconductor Suppliers to the Automotive Sector in 2009

CY09 Rank	CY08 Rank	CY07 Rank	CY06 Rank	Supplier	CY09 Share
1	2=	3	3	Infineon Technologies	8.0%
2	1	1	1	Renesas Electronics *	7.6%
3	2=	2	2	Freescale Semiconductor	7.3%
4	4	4	4	STMicroelectronics	7.0%
5	5	5	5	NXP Semiconductor	5.7%
6	6	6	6	Bosch	4.3%
7	8	7	8	Texas Instruments	3.7%
8	7	8	7	Toshiba	3.3%
9	11	11	12	ON Semiconductor	2.0%
10	9	9	9	Fujitsu	1.8%
				Others	49.3%
<b>2009 Market Size: \$15.8 bn</b>					<b>100%</b>

Source: Semicast Research ; Table Revised: April 2010

\* Renesas Electronics includes Renesas Technology and NEC Electronics

### Notes for Editors

1. Semicast has a strategic focus on the automotive sector and provides on-going research services to the global industry. Its Automotive Electronics & Entertainment Systems Service (AEES) has been developed specifically to aid automakers, Tier 1 vendors and semiconductor and software suppliers to understand on-going trends for the key automotive “under-the-hood” electronics and entertainment systems in light vehicles and to rationalize that demand to long term forecasts for system volumes, electronics value and semiconductor TAM.
2. Semicast is always willing to work with journalists to provide quotations, opinions and market information for articles. If you require further information, please contact us at [press\[at\]semicast.net](mailto:press@semicast.net)
3. Semicast is a respected provider of independent market research on the semiconductor and electronics industry. It specializes in coverage of new and emerging applications including industrial semiconductors, wireless semiconductors, automotive electronics, telematics/infotainment, digital consumer convergence and embedded processing.

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