

## Semiconductor Market Forecasts



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## Industrial/Medical Semiconductor Service

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## Abstract

The industrial sector remains undoubtedly the most complicated market for semiconductor manufacturers to serve. Applications cover a very diverse range and the supply chain is complicated. Owing to this complexity, the sector has historically been overlooked by many semiconductor vendors, who have elected instead to focus their marketing efforts on higher value and less complicated industries.

Although the industrial sector is fragmented and complex, it is also highly dependable. Equipment production volumes are unusually stable, industrial semiconductor devices rarely require the latest technology processes and the lifetime of an industrial design-win can often last ten years. Accordingly, the industrial sector has risen in importance at many semiconductor vendors over the last few years and revenues for semiconductors in the industrial sector exceeded those in automotive in both 2008 and 2009. The industrial sector also outperformed the overall semiconductor market in 2009.

Semicast has developed this study to focus on the strategic needs of semiconductor suppliers looking to identify the key equipment types driving semiconductor revenues in the industrial and medical sector and which market segments are forecast to have highest revenue growth. Last published in June 2008, the 2010 edition of the research builds on the work of the previous report, in particular to understand changes in the market composition and outlook following the economic downturn of 2008/9.

This study has been developed to be used as a companion report to the Semicast study **“Tactical Analysis of the World Industrial/Medical Electronics Market & Supply Chain”**, which meets the tactical needs of semiconductor suppliers looking to identify the key equipment types driving manufacturer revenues in the industrial and medical sector and who the leading OEMs are to focus resource on. Used together, the two reports provide a comprehensive tactical and strategic analysis of the industrial and medical sector for semiconductor vendors.

## Key Point Conclusions

- The industrial/medical market for semiconductors is forecast to grow from \$20.6 billion in 2009 to over \$35 billion in 2015.
- Compared to a total semiconductor market of around \$226 billion, the industrial/medical sector represented 9% of the total available market in 2009.
- Analog ICs and discretés were the largest semiconductor product categories in the industrial/medical sector in 2009, together accounting for around half of all semiconductor sales.
- 25 equipment types account for just over half of revenue growth and almost half of cumulative semiconductor revenues forecast for the industrial/medical sector over the period to 2015.
- Renesas Electronics is estimated to have been the leading supplier of semiconductors to the industrial/medical sector in 2009, ahead of Infineon Technologies and STMicroelectronics.

## Industrial/Medical Semiconductor Service - Overview

### Key features of the service include:

- Scope and specification developed specifically to meet strategic needs of semiconductor suppliers.
- Analysis of 135 industrial/medical equipment types (full list provided on page 4).
- Estimate and forecast for worldwide production volumes of each equipment type (2008-15).
- Estimate and forecast for semiconductor value in each equipment type (2008-15).
- Estimate and forecast for semiconductor TAM for each equipment type (2008-15).
- Identification and ranking of top 25 highest revenue applications.
- Analysis of supplier market shares for industrial/medical semiconductors in 2009.
- Highly quantitative analysis, with discussion summarized in short, easy to read bullet points.
- PDF and Excel delivery options available.
- Analyst support time to answer all reasonable questions relating to forecasts and conclusions

## Semiconductor Market Segmentation

The study provides analysis of the market for industrial/medical semiconductors into 16 product types:

- 4/8-bit MCU
- 32/64-bit MCU/eMPU
- Memory
- PLD/FPGA
- Standard Linear
- Power Discretes
- Actuators & Sensors
- LCDs
- 16-bit MCU
- Digital Signal Processor (DSP)
- Gate Arrays & Standard Cells
- Other Logic
- Application Specific Analog
- Other Discretes
- LEDs
- Other Optoelectronics

Further segmentation of the 32/64-bit MCU/eMPU category is also provided by architecture:

- ARM
- x86
- 68K/Coldfire
- Other
- MIPS
- Power Architecture
- SuperH

## Industrial/Medical Equipment Coverage

The equipment types analyzed by the study are as follows:

**Factory Automation & Control: Control & Compute** [Industrial Ethernet Infrastructure, Computer Numerical Control, Ruggedized/Industrial PCs, Single Board Computers, HMIs & Operator Panels, Machine Vision Inspection Systems, PLCs & PACs, Distributed & Remote I/O Modules] ; **Process Measurement & Field Instruments** [Process Analytical Instruments, Flow Measurement, Level Measurement, Pressure Measurement, Temperature Measurement, Process Variable Transmitters, Telemetry / RTUs, Process/Temperature Controllers, Position Sensing] ; **Switchgear** [Circuit Breakers, Contactors, Protection Relays, Solid State Relays] ; **Miscellaneous Automation** [Pumps, Robotics, Semiconductor Manufacturing & Test Equipment, Welding].

**Motor Drives:** AC Variable Speed Drives, DC Drives, Servo Drives, Stepper Drives, Soft Starters/Brakes.

**Lighting, Building Automation, HVAC&R: Lighting** [Electronic Lighting Ballasts, Exit & Emergency Exit Lighting, Lighting Controls, Street/Traffic Lighting & Control] ; **Building Automation** [Fire Detection, Fire Alarm Control Panels & Annunciators, Fire Alarm Notification, Intruder Alarm Control Panels, Intruder Detection & Notification, CCTV/Video Surveillance Cameras, CCTV/Video Surveillance Equipment, Electronic Access Control, Time & Attendance Equipment, Elevators & Escalators] ; **HVAC & Refrigeration**[Boilers & Warm Air Furnaces, Circulator Pumps, Compressors, Electronic Room Thermostats & Controls, Humidifiers/Dehumidifiers, Unitary Air Conditioners, Commercial Refrigeration] ; **Environment** [Electronic Utility Metering, Electronic Sanitation Control, Actuator Driven Blinds, Doors & Windows].

**EPOS, EFT & ID:** ATM (Automated Teller Machines), Handheld EFT Transaction Terminals, POS Authentication Pads, EPOS/ECR/Cash Drawer, Handheld Data Terminals, Fuel Dispensers, Vending/Payment/Change Machines, Card Readers, Coin Acceptors & Currency Validators, Printers, Scanners, Smart Cards.

**Test & Measurement: Application Specific T&M** [Automotive Test Equipment, DSL Test Equipment, Fiber Optic Test Equipment, LAN/MAN/WAN Test Equipment, SONET/SDH Test Equipment, Wireless Comms Test Equipment, Other Test Equipment] ; **General Purpose T&M** [Counters & Timers, Logic Analyzers, Digital Multimeters, Network Analyzers, Digital Oscilloscopes, PC-based Test Equipment, RF Power Meters, PXI/VXI-based Test Equipment, Resistance Meters, Signal/Function Generators, Spectrum Analyzers, Other General Purpose T&M] ; **Instrumentation** [Calibration Instruments, pH/ORP Instruments, Chart Recorders & Data Acquisition, Laboratory Instrumentation, Scales & Weighing, X-Ray Instrumentation].

**Consumer Medical:** Blood Glucose Meters, Blood Pressure Monitors, Electronic Cholesterol Monitors, Heart Monitors & Pedometers, Electronic Thermometers, Pregnancy Testers/Fertility Monitors

**Medical Imaging & Diagnostics: Medical Imaging** [CT, Ultrasound, MRI, PET/PET-CT, Analog X-Ray, Digital X-Ray, Picture Archiving & Communications (PACS)] ; **Diagnostics, Therapy & Monitoring** [ECG, Dialysis Machines, Medical Ventilators, Professional Care Diagnostics Equipment, Multiparameter Patient Monitors, Medical Lasers, Medical Endoscopes, Infusion Pumps, Pacemakers, Implantable Cardioverter Defibrillators (ICDs), Cardiac Resynchronization Therapy (CRT), Pain Management Devices, External Defibrillators, Analog Hearing Aids, Digital Hearing Aids, Fitness Machines, Electronic Beds, Wheelchairs, Powered Scooters].

**Power & Energy:** AC/DC Power Supplies, DC/DC Converters, DC/AC Power Inverters, Industrial Battery Chargers, UPS, Generators, Renewable Energy (Hydro/Solar/Wind).

**Industrial Transport:** Construction & Lifting Machinery, Agricultural Equipment & Machinery, Materials Handling Vehicles, Heavy Trucks & Busses, Refrigerated Trailers, Electric Motorized Vehicles, Trains/Trams/Subway Carriages.

## Sample Tables

Global Equipment Production Estimates and Forecasts in the Medical Imaging & Diagnostics Sector

Units (000s)	2008	2009	2010	2011	2012	2013	2014	2015	CAGR (09/15)	DIFF (09-15)	SUM (09>15)
<b>Medical Imaging</b>									-	0	0
CT									-	0	0
Ultrasound									-	0	0
MRI									-	0	0
PET/PET-CT									-	0	0
Analog X-Ray									-	0	0
Digital X-Ray									-	0	0
Picture Archiving & Communications (PACS)									-	0	0
<b>Diagnostics, Therapy &amp; Monitoring</b>									-	0	0
EKG									-	0	0
Dialysis Machines									-	0	0
Medical Ventilators									-	0	0
Professional Care Diagnostics Equipment									-	0	0
Multiparameter Patient Monitors									-	0	0
Medical Lasers									-	0	0
Medical Endoscopes									-	0	0
Infusion Pumps									-	0	0
Pacemakers									-	0	0
Implantable Cardioverter Defibrillators (ICDs)									-	0	0
Cardiac Resynchronization Therapy (CRT)									-	0	0
Pain Management Devices									-	0	0
External Defibrillators									-	0	0
Analog Hearing Aids									-	0	0
Digital Hearing Aids									-	0	0
Fitness Machines									-	0	0
Electronic Beds									-	0	0
Electronic Wheelchairs									-	0	0
Powered Scooters									-	0	0
<b>Sector Total</b>	0	0	0	0	0	0	0	0	-	0	0
<b>Annual Growth Rate</b>		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			

Source: Semicast Research

Table Revised: March 2010

Global Market for Semiconductors & LCDs in the Medical Imaging & Diagnostics Sector by Product

Revenues (US\$ Millions)	2008	2009	2010	2011	2012	2013	2014	2015	CAGR (09/15)	DIFF (09-15)	SUM (09>15)
<b>Actuators &amp; Sensors</b>									-	0.0	0.0
<b>Analog ICs</b>									-	0.0	0.0
Application Specific Analog									-	0.0	0.0
Standard Linear									-	0.0	0.0
<b>Discretes</b>									-	0.0	0.0
Power Discretes									-	0.0	0.0
Other Discretes									-	0.0	0.0
<b>Logic ICs</b>									-	0.0	0.0
Gate Arrays & Standard Cells									-	0.0	0.0
PLD/FPGA									-	0.0	0.0
Other Logic									-	0.0	0.0
<b>MCU/eMPU/DSP</b>									-	0.0	0.0
4/8-bit MCU									-	0.0	0.0
16-bit MCU									-	0.0	0.0
32/64-bit MCU/eMPU									-	0.0	0.0
-ARM sub-total									-	0.0	0.0
-MIPS sub-total									-	0.0	0.0
-Power Architecture sub-total									-	0.0	0.0
-68K/Coldfire sub-total									-	0.0	0.0
-x86 sub-total									-	0.0	0.0
-SuperH/RX sub-total									-	0.0	0.0
-Other 32/64-bit sub-total									-	0.0	0.0
Digital Signal Processor									-	0.0	0.0
<b>Memory ICs</b>									-	0.0	0.0
<b>Optoelectronics</b>									-	0.0	0.0
LEDs									-	0.0	0.0
Other Optoelectronics									-	0.0	0.0
LCDs									-	0.0	0.0
<b>Total</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Total (excluding LCDs)</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Annual Growth Rate</b>		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			

Source: Semicast Research

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## Analyst Biography

Colin Barnden - Principal Analyst



Colin joined Semicast Research in June 2006 and is principal analyst for semiconductor research and vice president of business development. Prior to joining Semicast, he worked for 12 years at IMS Research, rising to the position of Senior Research Director of its Semiconductor Research Group and responsible for analyst coverage on the analog/mixed signal, optoelectronic and embedded processing industries. Colin also set-up and established IMS Research's Automotive Electronics Group. During his tenure, Colin authored dozens of reports and became a well respected industry analyst. He holds a B.S. in Electronic Engineering from Aston University, England.

## About Semicast

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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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