

Global Manufacturing Market Tracker

Len Jelinek, Senior Director and Chief Analyst
Chris Welch, Principal Analyst

ACTUALS AND FORECAST

Frequency, Time Period

- Annual: 5-year forecasts

Measures

- Revenue

Regions, Markets

- Worldwide

Detail Level

- Technology
- Wafer size

TECHNOLOGIES COVERED

- Memory
- Logic
- Microcomponents
- Analog
- Discrete
- Other

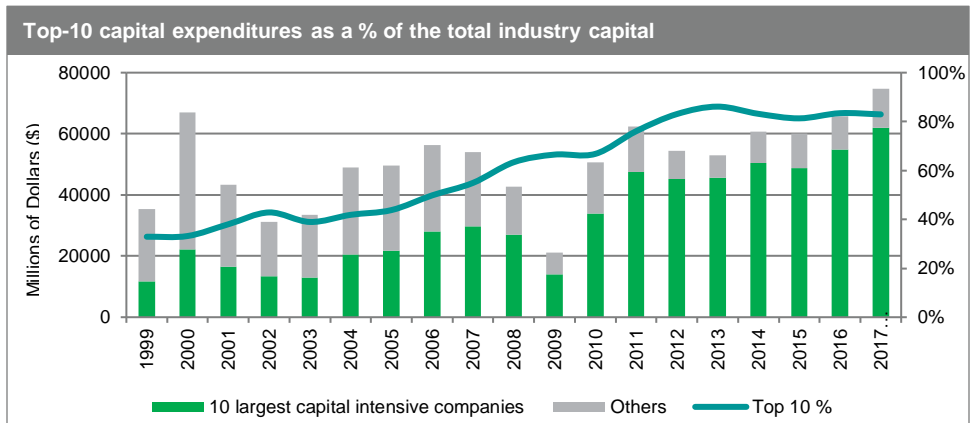
The semiconductor industry continues to be the enabler of technology innovations. In 2017, the semiconductor industry continued its transformation from an innovative high revenue growth industry to a consolidated and technology focused industry.

Global connectivity, the internet of things (IoT), wearables, autonomous driving and next generation communication 5G wireless broadband, continues to provide a framework for technology and revenue growth within our industry but the transitioning to real revenue growth within any of these areas of opportunity continues to remain elusive for virtually all of the semiconductor market players.

For manufacturers especially the Integrated Device Manufacturer (IDM) significant investments in capital and technology must be made in order to develop technology which will support the emerging market applications.

IHS Markit anticipates the industry will remain in transition as companies consolidate in order to improve operational efficiencies in order to strengthen financial performance. Broad based suppliers of technology that were once the global market leaders will continue to be forced to consolidate their technology and focus their product offerings.

The IHS Markit Global Manufacturing Market Tracker updates quarterly the latest information on strategies and partnerships of the key IDM's as they work to develop not only technology but new market opportunities.



Key Issues Addressed

- How will the technology transitions affect analog companies?
- Will the semiconductor industry continue to transition to a fabless manufacturing model or will the IDMs expand their manufacturing expertise and recapturing design of end market components?
- Are large mega manufacturing companies good for the semiconductor industry or is innovation better served through small entrepreneurial design companies?

Applicable To

- Purchasing
 - Strategic manufacturing analysts
 - Procurement managers
- Suppliers/distributors
 - Procurement managers
 - Suppliers of chemicals and consumables (silicon, chemicals)
- Other
 - Sales managers
 - CEOs

LEAD ANALYSTS

Len Jelinek – Director and Chief Analyst

Len Jelinek has focused his research on capacity management and technology transitions within the semiconductor industry. He works with clients to access individual corporate strategies that may be impacted by additional wafer manufacturing capacity in China as well as other global locations.

Len has developed an extensive database of wafer manufacturing suppliers both leading IDM's and pure play foundries service providers. This database can be used by clients to define corporate manufacturing strategies such as expand internal capacity versus transitioning to an outsourcing model.

Chris Welch - Principal Analyst

Chris works as a principal analyst within the semiconductor research group at IHS Markit. Chris conducts research and analysis on the global semiconductor manufacturing industry focusing on feature size migrations and wafer capacity for IDM (Independent Device Manufacturers). Additionally, he monitors and reports on raw silicon manufacturers and global supply trends and threats.

ABOUT IHS MARKIT

The Technology, Media and Telecom Group at IHS Markit is the leading source of information, insight and analytics in critical areas that shape today's technology ecosystem—from materials and components, to devices and equipment, to end markets and consumers. Businesses and governments in more than 150 countries around the globe rely on the deep market insight and expert independent analysis of our 300+ industry analysts in technology sectors spanning IT, telecom, media, industrial, automotive, electronics, solar and more.

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For more information [ihsmarket.com/technology](https://www.ihsmarket.com/technology)

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IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 85 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.