ACTUALS AND FORECAST

Frequency, Time Period
– Annual: 5-year forecasts
– Updated quarterly

Measures
– Revenue
– Capacity
– Wafer shipments

Regions, Markets
– Worldwide

TECHNOLOGIES COVERED

– CMOS logic

TECHNOLOGY, MEDIA & TELECOMMUNICATION ABSTRACT

Pure Play Foundry Market Tracker

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

A good year for the pure play foundry suppliers

Foundries that provide leading edge manufacturing nodes must continue to invest in technology transitions in order to differentiate themselves as the technology providers for the semiconductor industry.

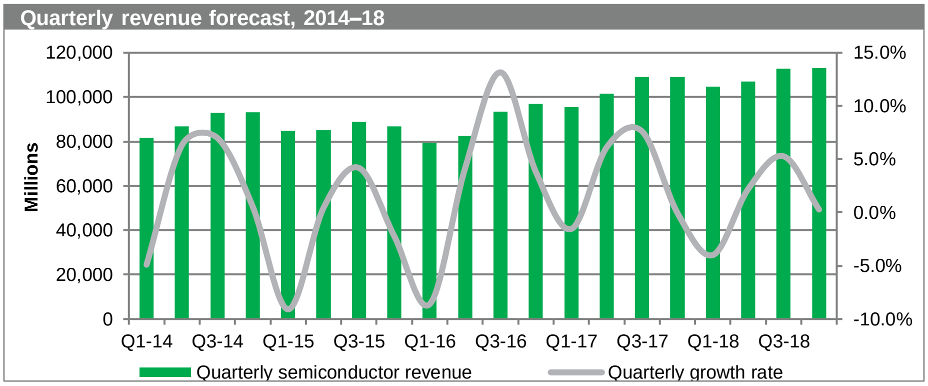
IHS Markit anticipates three significant trends will continue to shape manufacturing for foundry suppliers. First, the foundry industry will continue to be driven by rapid technology transitions. The need for faster, more power efficient advanced components for wireless and IoT applications will remain a primary focus especially for the tier one foundry suppliers.

Second, policies within China that are forcing preferential domestic manufacturing is resulting in a shift of manufacturing expansions to China. Most of the new construction will be close to completion by 2017. IHS Markit believes that the demand for semiconductors in the short-term will be insufficient to fill the Chinese expansions.

Third, the initial high demands supporting automotive and industrial applications will slow in 2018.This will result in an easing of current capacity constraints on 8-inch manufacturing.

The Pure Play Foundry Market Tracker updates quarterly the latest information on strategies and partnerships of the key 3rd party manufacturers as well as providing forecasts for the industry for the next several years.

Quarterly revenue forecast, 2014–18



Key Issues Addressed

- Where will fabless companies and IDM's find available capacity in the appropriate technology to meet their demands?
- What M&A are taking place in the foundry market, and how will they affect the suppliers as well as foundry users?
- How should companies view the Chinese foundry suppliers?
- What are the strategies for the key second tier foundries?

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 Telecommunication 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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