



# 世界の半導体動向と 生き残りをかけた日本の半導体

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# 世界の半導体動向

Business Model	R&D	Products	Customer	Strength	Weakness
Fabless	高	ASSP	大規模顧客	アプリへのR&D投資	市場・技術の早い変化(ハイリスク)
Fab-Light	低	MCU, Analog, Power	多様	プロセス投資低	プロセスでの差別化
IDM	高	Processor, Memory	大規模顧客	プロセスで差別化	プロセス投資に必要な規模の確保

- Fabless
  - 工場を持たずに企画、開発、販売
  - Mobile, Tablet, Networkなど
- Fab-Light
  - 一部工場を持ち最先端は外部の工場使用
  - Analog/Power device, MCUなど
- IDM(Integrated Device Manufacturer)
  - 工場を持ち企画、開発、製造、販売
  - Processor, Analog/Power device, MCUなど

# Semiconductor Business Ranking in 2012-13 by iSuppli

2012 Rank	2013 Rank	Company Name	2012 Revenue	2013 Revenue	Percent Change	Percent of Total	Cumulative Percentage
1	1	Intel*	\$47,420	\$46,960	-1.0%	14.8%	14.8%
2	2	Samsung Electronics*	\$31,264	\$33,456	7.0%	10.5%	25.3%
3	3	Qualcomm	\$13,177	\$17,341	31.6%	5.5%	30.8%
10	4	Micron Technology*	\$6,772	\$14,168	109.2%	4.5%	35.2%
7	5	SK Hynix	\$8,970	\$13,335	48.7%	4.2%	39.4%
5	6	Toshiba	\$11,131	\$12,459	11.9%	3.9%	43.3%
4	7	Texas Instruments	\$12,035	\$11,379	-5.5%	3.6%	46.9%
9	8	Broadcom*	\$7,843	\$8,121	3.5%	2.6%	49.5%
8	9	STMicroelectronics	\$8,493	\$8,076	-4.9%	2.5%	52.0%
6	10	Renesas Electronics Corporation*	\$9,236	\$7,822	-15.3%	2.5%	54.5%
13	11	Infineon Technologies	\$4,821	\$5,096	5.7%	1.6%	56.1%
12	12	Advanced Micro Devices (AMD)	\$5,297	\$5,076	-4.2%	1.6%	57.7%
14	13	NXP	\$4,114	\$4,658	13.2%	1.5%	59.1%
18	14	MediaTek	\$3,357	\$4,434	32.1%	1.4%	60.5%
11	15	Sony	\$6,109	\$4,394	-28.1%	1.4%	61.9%
16	16	Freescale Semiconductor	\$3,740	\$3,958	5.8%	1.2%	63.1%
15	17	nVidia	\$3,826	\$3,612	-5.6%	1.1%	64.3%
19	18	Marvell Technology Group	\$3,168	\$3,281	3.6%	1.0%	65.3%
22	19	ON Semiconductor	\$2,869	\$2,740	-4.5%	0.9%	66.2%
23	20	Analog Devices	\$2,671	\$2,677	0.2%	0.8%	67.0%
		<b>Top 20 Companies</b>	<b>\$196,313</b>	<b>\$213,043</b>	<b>8.5%</b>	<b>67.0%</b>	
		<b>All Others</b>	<b>\$106,612</b>	<b>\$104,833</b>	<b>-1.7%</b>	<b>33.0%</b>	
		<b>Total Semiconductor</b>	<b>\$302,925</b>	<b>\$317,876</b>	<b>4.9%</b>	<b>100.0%</b>	

Source: HIS iSuppli Research, 2012-2013

# Semiconductor Business Ranking in 2005-13 by iSuppli

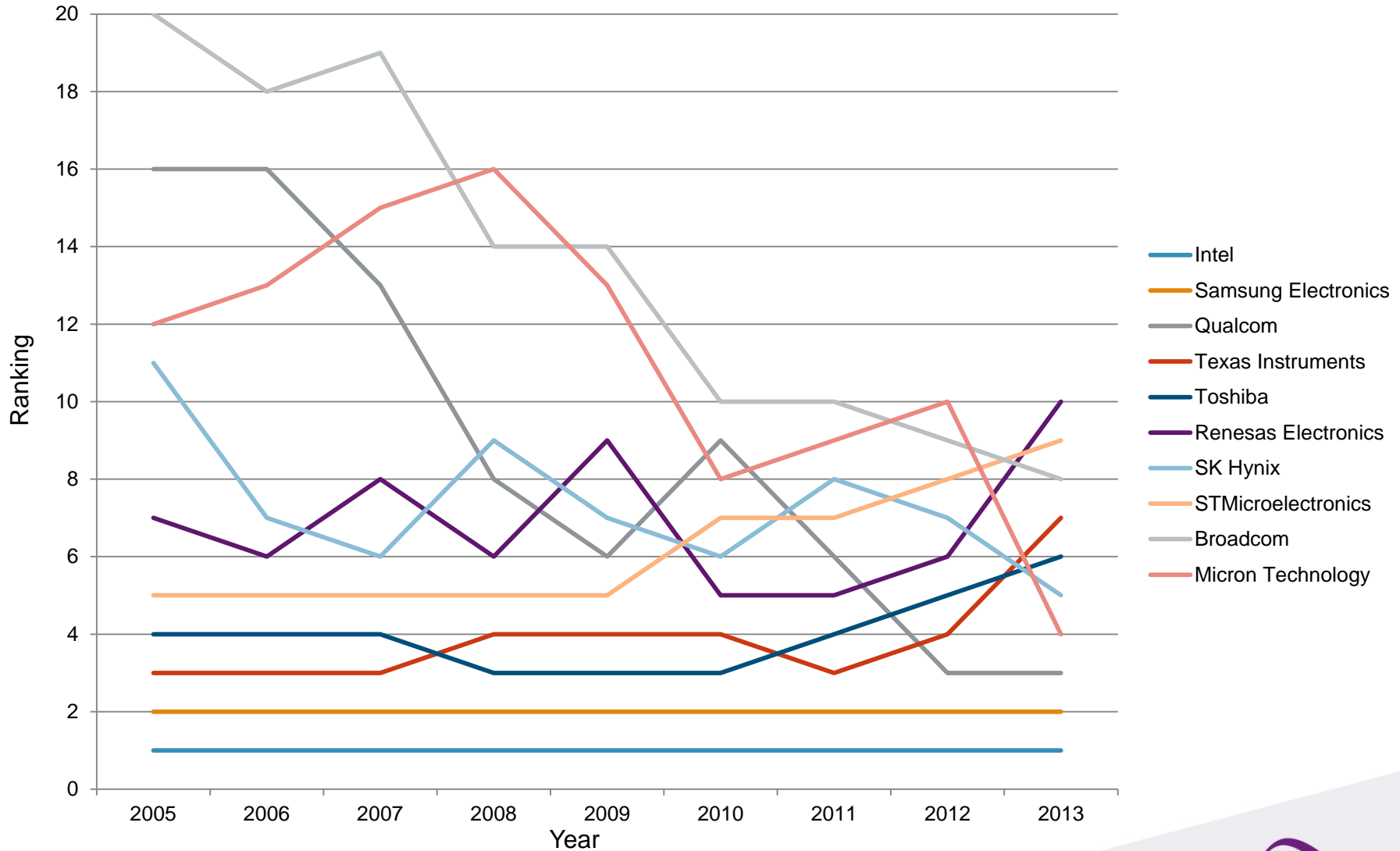
Semiconductor Business Ranking in 2005-2013 by iSuppli									
Company Name	2005	2006	2007	2008	2009	2010	2011	2012	2013
Intel	1	1	1	1	1	1	1	1	1
Samsung Electronics	2	2	2	2	2	2	2	2	2
Qualcom	16	16	13	8	6	9	6	3	3
Texas Instruments	3	3	3	4	4	4	3	4	7
Toshiba	4	4	4	3	3	3	4	5	6
Renesas Electronics	7	6	8	6	9	5	5	6	10
SK Hynix	11	7	6	9	7	6	8	7	5
STMicroelectronics	5	5	5	5	5	7	7	8	9
Broadcom	20	18	19	14	14	10	10	9	8
Micron Technology	12	13	15	16	13	8	9	10	4

Source: HIS iSuppli Research, 2005-2013



# Semiconductor Business Ranking in 2005-13 by iSuppli

Source: HIS iSuppli Research, 2005-2012



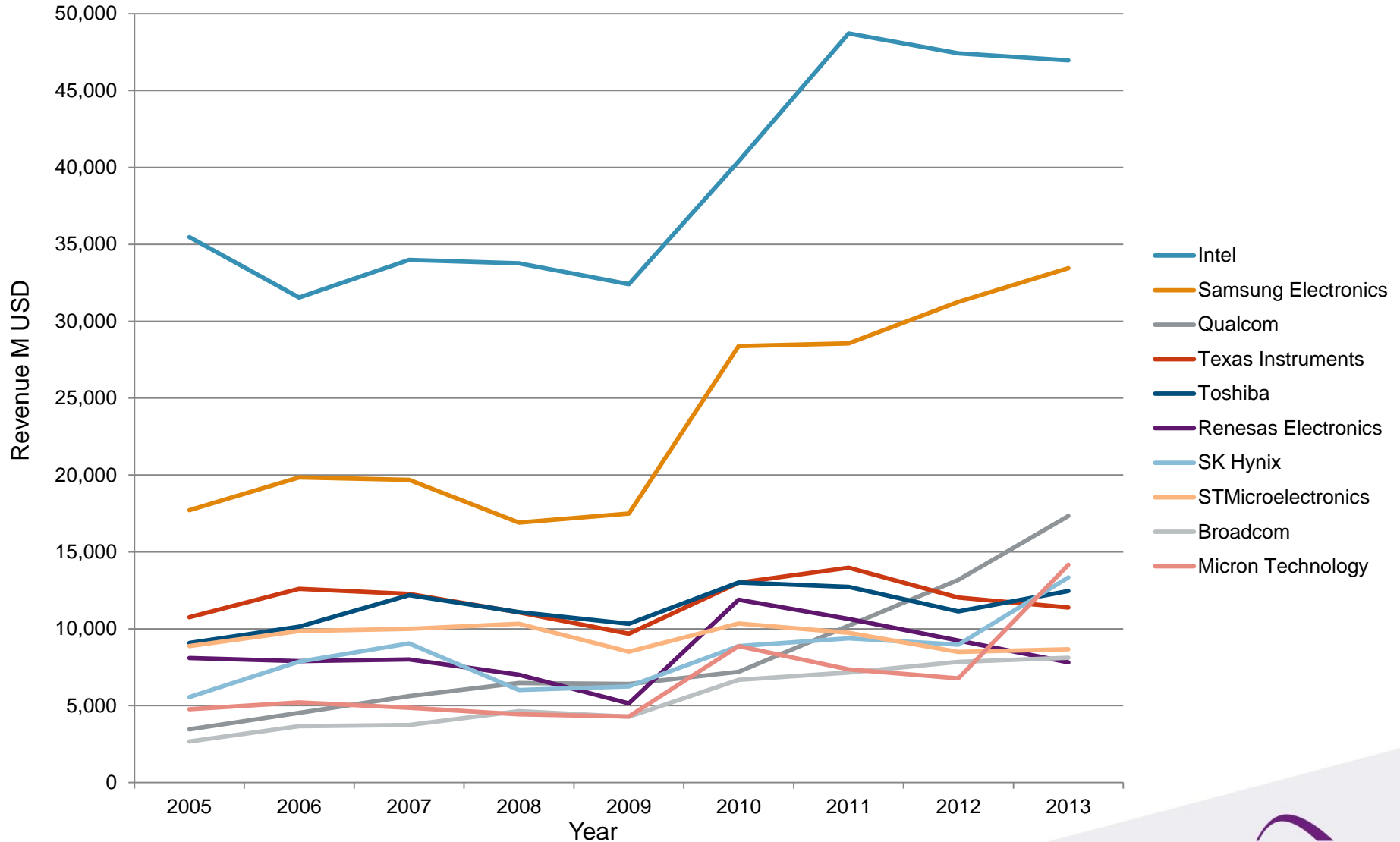
# Semiconductor Revenue in 2005-2013 by iSuppli

Semiconductor Business Ranking(Revenue M\$) in 2005-2013 by iSuppli								MUSD	
Company Name	2005	2006	2007	2008	2009	2010	2011	2012	2013
Intel	35,466	31,542	33,995	33,767	32,410	40,394	48,721	47,420	46,960
Samsung Electronics	17,710	19,842	19,691	16,902	17,496	28,380	28,563	31,264	33,456
Qualcom	3,457	4,529	5,619	6,477	6,409	7,204	10,198	13,177	17,341
Texas Instruments	10,745	12,600	12,275	11,068	9,671	12,994	13,967	12,035	11,379
Toshiba	9,077	10,141	12,186	11,081	10,319	13,010	12,729	11,131	12,459
Renesas Electronics	8,107	7,900	8,001	7,017	5,153	11,893	10,648	9,236	7,822
SK Hynix	5,560	7,865	9,047	6,023	6,246	8,876	9,375	8,970	13,335
STMicroelectronics	8,881	9,854	10,000	10,325	8,510	10,346	9,735	8,493	8,676
Broadcom	2,671	3,668	3,746	4,643	4,278	6,682	7,160	7,843	8,121
Micron Technology	4,775	5,210	4,869	4,435	4,293	8,876	7,365	6,772	14,168

Source: HIS iSuppli Research, 2005-2012

# Semiconductor Revenue in 2005-2013 by iSuppli

Source: HIS iSuppli Research, 2005-2012







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