

2010 Automotive Semiconductors

Semiconductor Applications Service



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Abstract

Growth in automotive semiconductor markets is closely tied to growth in light-vehicle production as a whole. Despite peaking in 2007, sales fell in 2008, and even more in 2009, down to 15.4 billion in sales, the largest single decline in the market's history. As the global financial crisis led to a significant slowdown in new vehicle sales and a steep decline in vehicle production in the last four months of 2008 and the first quarter of 2009, IC suppliers acted quickly to slow production in order to cease oversupply. As a result, total inventory levels stabilized somewhat in during the first quarter, and overall production improved somewhat in the second quarter, with the third quarter showing strong growth for semiconductor vendors, aided by the replenishment of the depleted inventories from the previous months.

Global automotive semiconductor revenue is forecast to recover, particularly from strong sales growth in regions such as China, India and Brazil, stabilization in Europe and Japan and recovery in North America. Global light vehicle production is forecast to rise steadily over the near term, from roughly 62 million autos in 2010 to around 76 million in 2015. Over this period, China is forecast to emerge as the key player, with production in China projected to exceed Japan in 2012 and North America in 2016. As global light vehicle production recovers, so too will automotive semiconductor sales, reaching \$17.3 billion in 2010.

Also contributing to sustained recovery in the automotive semiconductor market is the continued pervasion of electronics into almost all of the main systems in the vehicle. As consumers demand features that make driving safer and more environmentally friendly, while also adding increasingly sophisticated navigation systems, mobile connectivity, and entertainment, the total IC content per vehicle will increase dramatically.

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