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News Release

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INFINEON TECHNOLOGIES LEADS INDUSTRIAL SEMICONDUCTOR VENDOR SHARE RANKING IN 2012; MARKET UNCHANGED YEAR-ON-YEAR AT \$32.3 BILLION

London, England; April 15, 2013; According to analysis by Semicast Research, Infineon Technologies was the leading vendor of semiconductors to the industrial sector in 2012, although its lead over second placed Texas Instruments was cut to just a few tenths of a percent point. Both companies maintained a clear lead over the next largest vendors, STMicroelectronics and Renesas Electronics, with Analog Devices completing the top five. Semicast calculates that revenues for industrial semiconductors totaled \$32.3 billion in 2012, unchanged from 2011.

Semicast's definition of the industrial sector includes medical electronics and heavy transport (plant machinery, heavy truck and bus), but excludes military and aerospace electronics and marine communications. While historically overlooked by many vendors, semiconductor revenues in the industrial sector have now exceeded those in automotive since 2008, a trend which Semicast forecasts to continue over the medium term. Accordingly, the industrial sector has risen in importance at many semiconductor companies over the last five years and continues to do so as more vendors investigate the opportunities offered. Further, while industrial does not benefit from the hype and glamour of the consumer or wireless sectors, neither does it exhibit the "boom-and-bust" cycle so typical of the semiconductor industry as a whole.

In practice the industrial sector is a collection of markets within a market, encompassing areas as diverse as video surveillance, heart rate monitoring and agricultural machinery. This diverse application and customer base tends to smooth the ups and downs seen in many other verticals, but also leads to a fragmented semiconductor vendor ranking, since few suppliers have the expertise or resource to focus on all areas simultaneously, so target those segments which best fit their strengths.

Leading semiconductor vendors in industrial all have in-house expertise in either analog ICs, microcontrollers or power discretes. Together these three product categories account for almost two-thirds of semiconductor revenues in the industrial sector, reflecting the "real world" attributes of industrial applications, such as measurement, control and position. Intel remains the only manufacturer in the top ten vendor ranking which is not a supplier of any of these products, reflecting its position as the largest supplier of embedded microprocessors to the industrial sector.

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Colin Barnden, Principal Analyst at Semicast Research and study author, commented “Although supply to the industrial sector is led by some of the largest semiconductor vendors, the diverse nature of the application and customer base means there is room for success for many. Accordingly, companies who may have overlooked industrial applications in the past would be well advised to take a closer look”.

2012 Industrial Semiconductor Vendor Share Ranking

Infineon Technologies	7.1%
Texas Instruments	6.8%
STMicroelectronics	4.6%
Renesas Electronics	4.6%
Analog Devices	3.8%
Top 5 Total	26.9%
Others	73.1%

2012 Market Size: USD 32.3 billion
Source: Semicast Research

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Notes for Editors

1. Semicast has a strategic focus on industrial/medical electronics and provides on-going research services to the global industry. Its Industrial/Medical Electronics & Semiconductors Service has been developed specifically for semiconductor and component suppliers to understand detailed trends for industrial and medical electronics equipment revenues, equipment manufacturer market shares and semiconductor trends.
2. Semicast is always willing to work with journalists to provide quotations, opinions and market information for articles. If you require further information, please contact us at [press\[at\]semicast.net](mailto:press[at]semicast.net)
3. Semicast is a respected provider of independent market research on the semiconductor and electronics industry. It specializes in coverage of industrial and medical semiconductors, automotive electronics, telematics/infotainment, automotive semiconductors and embedded processing.