

Asia Pacific Logic IC - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Asia-Pacific logic integrated circuit (IC) market was valued at USD 123.58 billion in the previous year. It is expected to register a CAGR of about 7.65%, reaching USD 194.92 billion during the forecast period.

Key Highlights

- The increasing demand for industrial automation solutions, advanced medical and consumer devices, and electric vehicles in the Asia Pacific regions are among the major factors driving the growth of the logic integrated circuits market.
- Logic integrated circuits or logic ICs are semiconductor device that implements a basic logical operation based on one or more digital input signals. These ICs are used in almost every electrical and electronic equipment and circuitry.
- Over the years, the Asia Pacific region has witnessed significant development, with countries such as China, Japan, and South Korea emerging as the leading countries in terms of infrastructural and economic growth. For instance, China's industrial and manufacturing industry has grown so much that it is widely regarded as the global manufacturing hub, as most global players have established their manufacturing units in the country.
- Inspired by the growth of China, countries such as India, Taiwan, Thailand, and Vietnam, among others, have also started to up the ante by taking several initiatives, such as launching PLI schemes and making regulatory changes, to create a favorable scenario for the growth of the industrial sector in their respective regions. Furthermore, with the growing entry of global countries in these regions, the adoption of advanced industrial solutions such as automation, robotics, IIoT, etc. are also increasing, which altogether creates a favorable outlook for the growth of the studied market in the region.
- Moreover, the IT and telecom industry in the Asia Pacific region has also expanded rapidly, with countries such as India, Singapore, and China, among others, witnessing the highest growth owing to factors such as the availability of skilled workforce at a lower cost and favorable government regulations making Some of the Asian countries a favorite destination to outsource IT services. The emergence of IT giants such as TCS, Infosys, Wipro, etc, also drives this growth.

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-However, factors such as a higher development cost owing to the complexity associated with logic ICs are among the major factors challenging the studied market's growth. Additionally, the short life cycle of logic ICs is another major factor restraining the studied market's growth.

Asia Pacific Logic IC Market Trends

IT & Telecommunications to Hold a Significant Market Share

- Over the years, the Asia Pacific region has transformed into a major IT & telecommunication industry market. A large population base is among the major factors behind the growth of these industries as they not only make a large consumer base but also help in the development of a skilled workforce for industries such as IT to thrive.
- In recent years, the Asia-Pacific region has also experienced rapid growth in digitalization, resulting in transformational market trends such as online learning and remote working. Additionally, enterprises are progressively adopting next-generation ICT solutions such as artificial intelligence, cloud technology, big data, and enterprise-grade networks to assist digital transformation. All this has been made possible due to the region's growth of IT & telecommunication infrastructure.
- Furthermore, the region has also been significantly adopting rich media content and digital services such as digital financial services, video streaming, conferencing, and eCommerce to meet consumers' evolving digital lifestyles, which is also positively influencing the growth of the IT & telecommunication sector in the region.
- With telecommunication technologies such as 5G taking over the world, the Asia Pacific region is just a little behind, with countries like China even outpacing developed countries such as the United States in terms of the deployment of 5G infrastructure. Over the coming years, the region will also witness rapid growth in the 5G subscriber base. For instance, according to Ericsson, the North East Asia region will dominate the 5G market owing to the highest growth in the number of subscribers. By 2028, the number of 5G subscribers in the region will increase to 1,710 million from 408 million in 2021. Hence, the confluence of such trends will positively impact the studied market's growth in the region.

China to Hold a Significant Market Share

- China is expected to remain a lucrative market for the growth of the logic ICs market owing to the presence of a large consumer base for consumer electronic and computing products, wherein logic ICs are widely used. Additionally, a large industrial and manufacturing sector footprint, wherein advanced technologies such as automation and robotics are increasingly finding their place, also positively influences the demand for logic ICs.
- In recent years, China's IT and telecommunication industry has expanded significantly. The presence of a large telecom subscriber base has helped the telecom players grow significantly. For instance, according to the National Bureau of Statistics of China, in April 2023, the telecommunication industry in China generated a cumulative revenue of about CNY 144.88 billion (USD 20 billion), representing a year-on-year growth rate of approximately 7.3% that month.
- The arrival of 5G has also been positively influencing the growth of the IT & telecommunication industry in China, as it is driving investment in installing new equipment and base stations, driving the demand for logic ICs. According to MIIT, 5G base stations are expected to reach 2.31 million in 2022, from 0.15 million in 2019.
- Furthermore, China is also among the major markets for consumer electronic products owing to a higher penetration of consumer electronic gadgets such as smartphones, virtual reality, wearables, and drones. Additionally, the presence of an extensive electronics manufacturing ecosystem and supply chain also positively influences the studied market's growth.

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The Asia Pacific logic integrated circuits (IC) market is witnessing increased competition due to rising demand across various end-user industries. This surge in demand has also attracted new entrants, intensifying the competition among market players. Vendors are employing diverse strategies to gain a competitive advantage, including forming partnerships, introducing new products, and engaging in mergers and acquisitions. Notable market participants include Toshiba Electronic Devices and Storage Corporation, STMicroelectronics NV, and Renesas Electronics.

In April 2023, Japan's Ministry of Industry revealed its plans to grant Rapidus, a state-backed chip manufacturer, an additional JPY 300 billion (approximately USD 3 billion) in funding. This funding aims to support the construction of a semiconductor facility on the northern island of Hokkaido, responding to Rapidus's requirement for capital to initiate mass production of advanced logic chips. These investments are expected to facilitate the company's expansion in the chip manufacturing sector.

In December 2022, IBM announced a collaboration with Rapidus, an emerging advanced logic foundry specializing in the development, design, and sales of advanced logic semiconductors. This partnership seeks to further promote the adoption of logic scaling technology in Japan. Through this collaboration, Rapidus will harness IBM's extensive expertise in semiconductor research and design.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry value Chain Analysis
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.3.1 Threat of New Entrants
 - 4.3.2 Bargaining Power of Buyers
 - 4.3.3 Bargaining Power of Suppliers
 - 4.3.4 Threat of Substitute Products
 - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Impact of Macroeconomic Factors on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Growing Adoption of Automation & Robotics
 - 5.1.2 A Growing Penetration of Consumer Electronic Devices

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5.2 Market Restraints

5.2.1 Design Complexity & Reliability

6 MARKET SEGMENTATION

6.1 By Type

6.1.1 TTL (Transistor Transistor Logic)

6.1.2 CMOS (Complementary Metal Oxide Semiconductor)

6.1.3 Mixed-Signal IC

6.2 By Product Type

6.2.1 ASIC

6.2.2 ASSP

6.2.3 PLD

6.3 By Application

6.3.1 Consumer Electronics

6.3.2 Automotive

6.3.3 IT & Telecommunications

6.3.4 Manufacturing and Automation

6.3.5 Other Applications (Healthcare, Aerospace & Defense, etc.)

6.4 By Country

6.4.1 China

6.4.2 Japan

6.4.3 South Korea

6.4.4 Rest of Asia Pacific

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 STMicroelectronics NV

7.1.2 Intel Corporation

7.1.3 Texas Instruments Incorporated

7.1.4 Renesas Electronics Corporation

7.1.5 Broadcom Inc.

7.1.6 NXP Semiconductor Inc.

7.1.7 ON SEMICONDUCTOR CORPORATION

7.1.8 Microchip Technology Inc

7.1.9 Nexperia

7.1.10 Analog Devices Inc.

7.1.11 Toshiba Electronic Devices and Storage Corporation

8 INVESTMENT ANALYSIS

9 FUTURE OUTLOOK OF THE MARKET

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