

Asia-Pacific Semiconductor (Silicon) Intellectual Property - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia-Pacific Semiconductor Intellectual Property Market is expected to register a CAGR of 8.3% during the forecast period.

Key Highlights

- The government has also played a significant role in molding the market in China. Since August 2020, the government of China has issued several new related policy measures to boost the development of its semiconductor industry. To begin with, in August 2020, China's State Council issued a Notice on different policies to promote the development of the IC industry and software industry.
- Also, in March 2021, the government issued several implementing measures that include criteria companies must meet to qualify for government preferences, tax, and tariff provisions. In addition, China's new policies encourage the United States and foreign semiconductor companies to transfer specific technology, intellectual property, research, and development to operations in China, driving growth in the domestic market. Furthermore, such policies offer preferential terms over the next ten years, including IP protection, tax, and financing for companies willing to establish capabilities, including production facilities in China.
- Taiwan is one of the largest producers of semiconductors in the world. The country is home to Taiwan Semiconductor Manufacturing Limited (TSMC), United Microelectronics Corporation, and other prominent players, driving the country's semiconductor industry. The semiconductor market in the country is also growing due to support from the government. Recently, the National development fund announced that between 2021 and 2025, the Taiwan companies have planned USD 107 billion investment for the semiconductor industry's growth. The government is also helping develop new semiconductor technologies with funding support and talent recruitment programs. Therefore, the increase in the semiconductor market leads to a rise in intellectual properties as well.
- However, The complexity of system on chip (SoC) designs is outpacing systems engineering capabilities. Increasing design complexity has given rise to increasing data size and thus, making semiconductor development more challenging than before,

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and is restraining the growth of the studied market. Further, the overall semiconductor market witnessed significant growth in 2020 compared to 2019, despite the COVID-19 pandemic, and it is further expected to grow in the coming years, owing to massive end-user demand. This has also supported the growth of the market vendors.

- For instance, in October 2020, Cadence reported a revenue of USD 667 million in the third quarter of 2020, compared to the revenue of USD 580 million reported for the same period in 2019. The company also raised its 2020 revenue and earnings forecast due to higher second-half hardware and IP sales activity in China and continuing progress in the system design and analysis business. For the fourth quarter of 2020, the company expected the total revenue in the range of USD 720 million-USD 740 million.

APAC Semiconductor (Silicon) Intellectual Property Market Trends

Consumer Electronics to Hold a Major Market Share

- The consumer electronics industry is evolving exponentially, and the pressure of demands from the consumer side has been compelling suppliers to provide differentiated products and be the first movers in the market. Currently, smart products are comprised of complex electronic systems that require an error-less operation. Faster data rates, device miniaturization, support for multiple wireless technologies, and longer battery life demand rigorous analysis. Furthermore, demand for various feature integrations onto a single device has led to intricate circuit board designs.

- Semiconductors are integrated into communication devices such as mobile phones and consumer electronics like gaming consoles, TV sets, and household appliances. The invention of integrated circuits (ICs) was one of the major drivers behind the development of the consumer electronics industry, including broadband and increasingly mobile applications.

- The market is continued in a strong position due to the data processing application market, driven by increased tablet sales and the communications market by smartphone sales. Moreover, consumer electronics also benefitted from a growth in units sold, particularly in digital set-top boxes.

- Vendors in the market are developing and integrating new technologies for applications in the consumer electronics market. For instance, in May 2021, Synopsys Inc. announced multiple SoC tape-outs at early adopters of the next-generation Arm Cortex-X2, Cortex-A510, and Cortex-A710 CPUs based on Arm Mali G710 GPUs, Armv9, and Arm DynamIQ. These next-generation SoCs were developed for high-end consumer devices to deliver improved performance and power efficiency through Arm's new architectural innovations. Furthermore, the company jointly developed flows and methodologies aiming at 5nm, 4nm, and 3nm advanced-process technologies.

- Moreover, Imagination Technologies provides Semiconductor IP solutions targeting smartphones, digital television, tablet, and set-top box. The company integrates semiconductor design capability with PowerVR multimedia and AI cores to create advanced SoCs for further smartphone revolution.

The Automobile Segment is Anticipated to Register High Growth Rate

- The fast pace of innovation in the automobile industry has directly impacted the cost of automobile electronics in the total cost of vehicle design and build. As a result, this has led to an increased focus on the value of the IP needed to complete technology integration in the automotive space. Autonomous vehicles have become one of the largest consumers of semiconductor chips. Advanced driver assistance systems, autonomous driving systems, and in-vehicle infotainment drive the need for sensors such as LiDARs and RADARs, interconnected cameras, displays, and onboard processors.

- It is anticipated that each autonomous car will be able to create and consume up to 4 terabytes of data per hour. High-speed wired connectivity is crucial to moving this data from sensors to processing nodes and connecting the automotive components

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with low latency. Moreover, due to stringent safety requirements, automotive connectivity has to be resilient and reliable to interference and noise under harsh environments. In 2020, MIPI, a mobility-oriented global business alliance, released the first automotive long-reach SerDes interface specification, allowing data rates as high as 16 gigabits per second with a plan to 48 gigabits per second and beyond.

- Many companies are utilizing the autonomous vehicles trend by providing automotive semiconductor IPs. For instance, Achronix Semiconductor Corporation's Speedcore eFPGA IP enables automotive semiconductor suppliers to include a custom amount of programmable logic in their devices which permits more customization than a typical CPU or GPU.
- Further, the automobile sector is witnessing the integration of Machine Learning (ML) and Artificial Intelligence (AI) in vehicles, primarily for enabling autonomous driving functionalities. Additionally, combining 5G networks is expected to make vehicle-to-everything (V2X) technology more viable in major metropolitan areas. General Motors has launched a production vehicle equipped with V2X technology, the Buick GL8, in China. It is the first such brand with this technology in China. General Motors also announced that 5G technology would be available on new Cadillac and most Chevrolet and Buick vehicles starting in 2022.
- Incorporating such advanced technologies in the automobile sector drives the need for semiconductors, resulting in driving application-specific semiconductor IPs. As a result, companies are investing to fulfill the market demands.

APAC Semiconductor (Silicon) Intellectual Property Industry Overview

The Asia Pacific Semiconductor (Silicon) Intellectual Property Market is a highly competitive market and consists of several significant players like Faraday Technology Corporation, Cadence Design Systems Inc., Fujitsu Ltd, eMemory Technology Inc., etc. In terms of market share, few of the major players currently dominate the market. These companies are leveraging strategic collaborative initiatives to increase their market share and increase their profitability.

- June 2021 - Faraday Technology Corporation announced its LPDDR4 and LPDDR4X combo PHY IP up to 4.2Gbps, which is currently available in Samsung's 14nm LPC process. The highly compact design provides additional flexibility with two hardened configurations supporting both in-line rectangular and corner-edge placement.
- June 2021 - Synopsys Inc. partnered with Samsung Foundry to provide Synopsys Fusion Design Platform to enable Samsung Foundry to achieve first-pass silicon success for multi-subsystem system-on-chip (SoC). It augments the extended power, performance, and area benefits of its next-generation, 3nm gate-all-around (GAA) process technology.
- April 2021 - eMemory Technology Inc. partnered with Achronix Semiconductor Corporation, a prominent provider of FPGA-based data accelerator devices for improving security at the semiconductor chip level. eMemory will contribute its NeoFuse and NeoPUF IP to the Achronix portfolio.

Additional Benefits:

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

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