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THE WORLDWIDE IC PACKAGING MARKET

2014 EDITION

**The Most Comprehensive Report Available
On The Global IC Packaging Industry**

Report Highlights

- **Industry Overview**
 - ◆ **Economic Overview**
 - ◆ **Semiconductor Industry Analysis**

- **Worldwide IC Packaging Market Forecasts, 2012–2018**
 - ◆ **Units**
 - ◆ **Package Prices**
 - ◆ **Packaging Revenue**
 - ◆ **By Semiconductor Product**
 - ◆ **By Package Family**
 - ◆ **By I/O Range**

- **OSAT IC Packaging Market Forecasts, 2012–2018**
 - ◆ **Units**
 - ◆ **Package Prices**
 - ◆ **Packaging Revenue**
 - ◆ **Competitive Rankings**
 - ◆ **Company Profiles**

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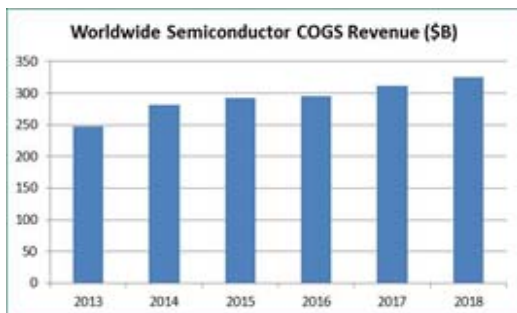
The Worldwide IC Packaging Market, 2014 Edition

Synopsis

While the integrated circuit (IC) market tends to be cyclical in nature, the general trend is for more ICs to be integrated into more products over time. The market is being driven by demand for handheld consumer devices as well as advanced computing products. All product segments (transportation, medical/industrial, communications and computers) are expanding rapidly with advances in semiconductor packaging technology leading innovation.

Following an unexpectedly robust year of growth (7.9%), in 2013, the semiconductor industry appears to have recovered its former strength after the devastating economic downturn at the end of the last decade. While the rate of growth for both semiconductors shipped and worldwide revenues will decline somewhat, the market is expected to post a respectable compounded growth of more than 4% over the next five years.

New Venture Research (NVR), in the **2014 Edition** of **The Worldwide IC Packaging Market**, analyzes the semiconductor industry and uses this analysis to forecast the future of the global IC packaging market. The report begins with an economic and industry overview, then examines the historic and future unit and revenue IC growth.



Source: SIA and NVR estimates

Following this high-level review, the report presents forecasts for the total worldwide IC packaging marketplace (Chapter 4), and explains the market segmentation defined by NVR. Next, the report dives deeply into an analysis of each semiconductor product type (Chapter 5), and segments these products by package family and I/O count range. The analysis returns to the individual package families (Chapter 6) and presents each in terms of semiconductor devices and I/O count. In all tables, unit shipments and revenue figures are displayed for each segment.

Next, the report presents NVR's continuing coverage of the outsourced semiconductor assembly and test (OSAT) market. These companies already comprise a significant share of the worldwide IC packaging market and will continue to grow in importance in the coming years. The report presents the total OSAT market in terms of both unit shipments and revenues. To help you further assess this group of companies, the report profiles the activities of the leading OSAT companies and the packages they offer.

The Worldwide IC Packaging Market, 2014 Edition continues NVR's leadership position in assessing the status and future of IC packaging. This report is an effective and economical tool for any company associated in the semiconductor industry to aid in assessing their own markets and potential areas of growth. The report sells for \$3495 and is delivered by email as a single-user PDF file. Extra single-user licenses sell for \$250 each and a corporate license is \$1000. With the purchase of the report, an Excel spreadsheet of all tables may be obtained for an additional \$750 and a printed copy for \$250.

About the Author

Jerry Watkins is an independent senior analyst with more than 17 years of experience in the field of market research and consulting. He has worked for leading research companies such as Frost & Sullivan, Lucid Information Services, and NSI Research both in management and as a writer. Mr. Watkins has authored many syndicated reports, previously in the telecommunications sector and more recently in the computing and merchant embedded computing industry. He holds three university degrees including a B.A. in History, as well as a M.A. in International Studies.

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Chapter 2: Executive Summary

Chapter 3: The State of the Industry

Global Electronics Industry Outlook

Global Electronics Market

Chapter 4: Worldwide IC Packaging Market Analysis and Forecasts - 2012-2018

<u>Package Type</u>	<u>I/O Count Range</u>
DIP	004-018
SOT	020-032
SO	034-100
TSOP	104-304
DFN	308-999
CC	1,000+
QFP	
QFN	
PGA	
BGA	
FBGA	
WLP	
DCA	

Chapter 5: IC Package Market Analysis and Forecasts by Semiconductor Device - 2012-2018

Device Types: Package Types: I/O Count:

MPU	DIP	004-018
MCU	SOT	020-032
DSP	SO	034-100
DRAM	TSOP	104-304
Flash	DFN	308-999
SRAM	CC	1,000 +
ROM/EPROM	QFP	
EEPROM/Other	QFN	
Digital Bipolar	PGA	
Standard Logic	BGA	
Gate Arrays	FBGA	
Standard Cell/PLD	WLP	
Display Drivers	DCA	

Special Purpose Logic and Application Specific
Analog - All Segments

Chapter 6: IC Package Market Analysis and Forecasts by Packaging Family - 2012-2018

Overview

Dual In-line Package Markets

Small Outline Transistor Markets

Small Outline Markets

Thin Small Outline Packages Markets

Dual Flat Pack No Lead Markets

Chip Carrier Markets

Quad Flat Pack Markets

Quad Flat Pack No Leads Markets

Pin Grid Array Package Markets

Ball Grid Array Package Markets

Fine Pitch Ball Grid Array Package Markets

Wafer Level Packaging Markets

Direct Chip Attach Markets

Chapter 7: OSAT Market Analysis and Forecasts

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Unit, Revenue, Pricing Forecasts by Package Family

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Chapter 8: OSAT Company Profiles

3D Plus, Inc.

Advotech

AIC Semiconductor

Amkor

Anst China

ASE

Azimuth

Carsem

ChipMOS

Cirtek

CORWIL Technology

Deca Technologies

FlipChip Int'l

HANA Microelectronics

HANA Micron

i2a Technology

J-Devices

Jiangsu Changjiang

Lingsen

PrecisionMillennium

Microtech

NANIUM

Nantong Fujitsu

OSE

Powertech

Shinko Electric

Signetics

Sigurd

Siliconware

SPEL

STATS ChipPAC

Tera Probe

Tianshui Huatian Tech

Unisem

UTAC

Vigilant Technology

XinTec

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IC Packaging Revenue Forecast	Small Outline Transistor Packages by Device
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Price per I/O by Package Family	SO Forecasts
Package Price Forecasts	Thin Small Outline Packages
IC Product Forecasts	TSOP Forecasts—3 I/O Ranges
MPU	Dual Flat Pack No Lead Packages
MCU	DFN Forecasts—2 I/O Ranges
DSP	Chip Carrier Packages by Device
DRAM	Chip Carrier Forecasts—2 I/O Ranges
Flash	Quad Flat Packs by Device
SRAM	QFP Forecasts—2 I/O Ranges
ROM and EPROM	Quad Flat Pack by Device
EEPROM/Other Memory	QFN Forecasts—4 I/O Ranges
Digital Bipolar	Pin Grid Arrays by Device
Standard Logic	PGA Forecasts—2 I/O Ranges
Gate Arrays	Ball Grid Array Packages by Device
Cell-Based and PLD	BGA Forecasts—4 I/O Ranges
Display Drivers	Fine Pitch Ball Grid Array by Device
Special Purpose Logic	FBGA Forecasts—6 I/O Ranges
Amplifiers	Wafer Level Packages by Device
Interfaces	WLP Forecasts—4 I/O Ranges
Voltage Regulators	Direct Chip Attach ICs by Device
Data Converters	
Application Specific Analog	OSAT Total Forecast
	Packaging OSAT Rankings

Publish Date: August 2014 - 400+ Pages

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