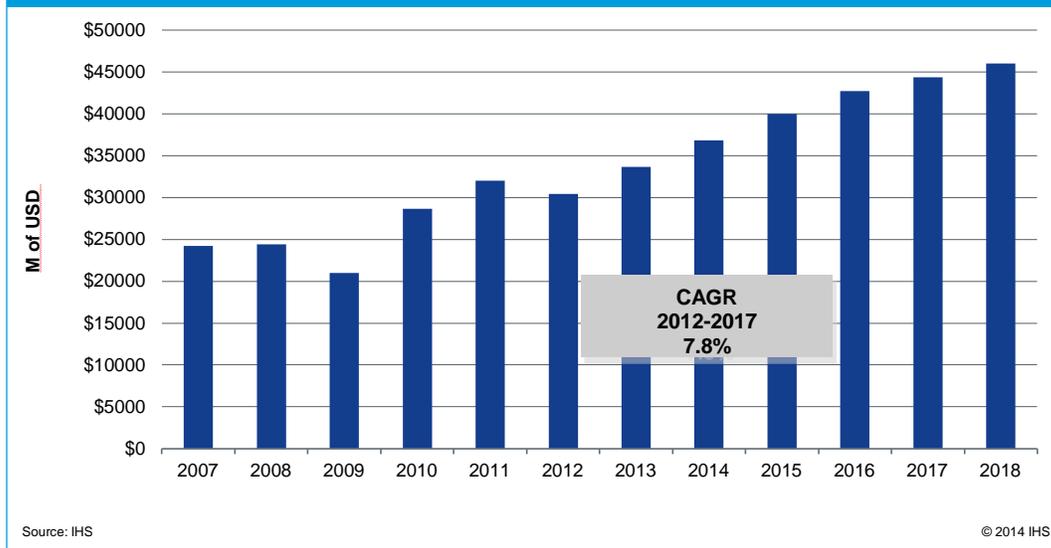




The industrial electronics market was worth \$33.7 billion in 2013 or 10% of the entire semiconductor market. Industrial electronics spans a variety of application fields comprising manufacturing and process automation, test and measurement, medical electronics, building and home control, energy generation and distribution, and military and civil aerospace.

Industrial electronics is not just a niche; it is an exciting market with more than 100 semiconductor suppliers – over 50 of these companies earned more than \$100 million from this segment in 2013. It is an exciting market because it typically provides higher margins than other semiconductor categories, is less cyclic, and the mid- to long-term demand for industrial electronics is bound to soar: Factory automation will need more intelligence, but so will buildings to reduce their energy consumption and emissions. The medical electronics market will continue in its goal to benefit an increasingly ageing population. Finally, growing demand in BRIC countries for building infrastructure and also aerospace will also drive the growth of the industrial electronics market.

Industrial Semiconductor Market, 2007-2018



Key Issues Addressed

- What are the fastest growing segments?
- What are the key trends and regulations driving the market?
- Who are the suppliers and buyers of semiconductors for industrial electronics?
- Where are industrial electronics devices designed?
- What is the impact of the emerging BRIC countries?
- What are the opportunities for fast growing markets e.g. smart meters and LED general lighting?

Applicable To

- Semiconductor companies
- Purchasing departments at system companies, e.g. for medical devices, defense and aerospace, energy, automation ...
- OEM, EMS and ODM
- Semiconductor foundries
- Semiconductor distributors

Actuals and Forecast

Frequency, Time Period

- 6-year historical and 6-year annual forecast (2007 - 2018 data)
- Quarterly update

Measures

- Revenue and shipment by semiconductor device, by segment, and sub-segment
- Market shares
 - By application segment (top 10)
 - By semiconductor device category (top 10)
 - Cross analysis of revenue distribution by application segment and semiconductor category for top 20 semiconductor suppliers

Regions, Markets

- Worldwide
- Regional breakout by region and country of semi spending

Semiconductor Device Categories

- Memory IC
 - DRAM
 - Flash Memory
 - Other Memory
- Micro-component IC
 - Microprocessor (MPU)
 - Microcontroller (MCU)
- Logic Application Specific IC
- Analog IC
 - General Purpose Analog
 - Analog Application Specific IC
- Discretes
 - RF & Microwave
 - Power Transistor, Thyristor, Rectifier & Power Diode
 - Small Signal & Other Discretes
- Optical Semiconductor
 - Image Sensors
 - LEDs
 - Other Optical Components
- Sensors and Actuators

Lead Analysts

Robbie Galoso, Principal Analyst

Robbie specializes in market research with years of experience in primary and secondary research projects involving companies in the Electronics industry. At IHS, Robbie manages the overall data quality of its semiconductor market share databases and its timely delivery to clients. Robbie's research reports provide insights shaping the products and companies in the industrial electronics market which includes factory automation, security, energy, medical, military & aerospace segments. His responsibilities also include synthesis of worldwide economic trends to help generate accurate market forecasts. Prior to joining IHS in 2002 as an analyst, Robbie was an analyst for two Fortune 500 companies. Robbie earned his Bachelor of Business Administration in International Business and Economics from Loyola Marymount University and Master of Business Administration from Peter Drucker School of Management at Claremont Graduate University.

Tom Hackenberg, Principal Analyst

Tom Hackenberg is the IHS Technology principal analyst responsible for microcontrollers and digital signal processors across all markets and applications. This includes providing both forecasts for MCUs and DSPs and the competitive landscape for the primary competitors in these markets.

In addition to this broad coverage, Tom specializes in providing support for processor forecasts and analysis for two specific target markets greatly influencing the overall MCU and DSP markets. The first is automotive where his areas of specialty include processors used for infotainment, advanced driver assist systems, power train and body electronics. The second is industrial electronics with specialization focusing on processors used in automation, medical, building automation, energy, military/aerospace and other industrial markets. Tom is well versed in all processor components including CPUs, GPUs, MPUs, MCUs, ASICs & ASSPs, FPGAs and configurable processors.

Tom holds a BSEE from the University of Texas at Austin specializing in Processors and FPGAs.

About IHS (www.ihs.com)

IHS (NYSE: IHS) is the leading source of information, insight and analytics in critical areas that shape today's business landscape. Businesses and governments in more than 165 countries around the globe rely on the comprehensive content, expert independent analysis and flexible delivery methods of IHS to make high-impact decisions and develop strategies with speed and confidence. IHS has been in business since 1959 and became a publicly traded company on the New York Stock Exchange in 2005. Headquartered in Englewood, Colorado, USA, IHS is committed to sustainable, profitable growth and employs 8,000 people in 31 countries around the world.

Segments/Sub-segments Covered

Manufacturing and Process Automation

- Control
- Motor Drive
- Human Machine Interface
- Networking
- Other Manufacturing and Process Automation

Energy Generation & Distribution

- Energy generation
- Energy distribution
- Energy conversion and storage
- Oil and gas exploration and exploitation

Medical electronics

- Consumer medical devices
- Diagnostic, patient monitoring and therapy
- Medical imaging
- Medical instruments

Test & Measurement

- General Purpose T&M
- ATE
- Application Specific T&M

Building & Home Control

- Climate control
- Lighting
- Security
- Metering (in homes and buildings)
- Others

Military & Civil Aerospace

- Satellites
- Missiles and munitions
- Avionics
- Homeland security
- Terrestrial transport
- Other military and civil aerospace

Other Industrial

- Terminals
- Transportation
- Power Tools
- Others

Sample Table of Contents

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 - Semiconductor Market growth drivers
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- Industrial Semiconductor market by device
- Top Semiconductor suppliers for industrial electronics markets
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