Renesas Electronics leads OE Automotive Semiconductor Vendor Ranking in 2011; Freescale falls to fourth behind STMicroelectronics

According to the latest analysis by Semicast Research, Renesas Electronics was the leading supplier of semiconductors to the OE automotive sector in 2011, ahead of Infineon Technologies. Freescale Semiconductor, for many years the leading supplier of automotive semiconductors, dropped to fourth position behind STMicroelectronics, while NXP Semiconductor retained its position as fifth ranked supplier.

Semicasts OE automotive semiconductor market share analysis ranks Renesas Electronics as the leading supplier in 2011, with an estimated market share of 13.6%. Renesas Electronics, which was formed on 1 April 2010 following the merger of Renesas Technology and NEC Electronics, held a substantial lead over the second placed supplier, Infineon Technologies, which had an estimated market share of 9.8%. While tied for third place in 2010, STMicroelectronics is judged to have been the clear third placed supplier in 2011 with a market share of 8.9%, now ahead of Freescale on 8.1%. Colin Barnden, Principal Analyst at Semicast Research and study author, commented "The list of suppliers making up the top five leading positions to the OE automotive semiconductor market has now remained unchanged since 2006, despite the dramatic rises and falls in the market over this period".

Increased production of hybrid electric and battery electric vehicles is forecast to offer substantial new revenue opportunities for semiconductor suppliers in the years ahead, with production of hybrid vehicles forecast to rise from five million in 2011 to 62 million in 2018. Demand for power discretes and modules is judged to have risen strongly in 2011, in-line with increased production of hybrid/electric vehicles and this is judged to have helped the specialist power semiconductor suppliers, in particular Infineon Technologies and STMicroelectronics, to increase share last year. Hybrid vehicles use power discretes and modules extensively in the engine management system, to control the motor/generator units either when running from the hybrid powertrain, or when energy is being stored under braking.

Semicast forecasts global light vehicle production volumes to grow to 82.2 million in 2012, from 76.4 million in 2011. Almost two-thirds of this increase is forecast for Brazil, Russia, India and China, with China now the engine of growth for global light vehicle production. Semicast forecasts light vehicle production to grow moderately in North America in 2012 and also in Japan, as the supply chain is restored following the disruption caused by the March 2011 earthquake and tsunami. In comparison, Semicast sees European light vehicle production stalling in 2012, as the debt crisis and on-going possibility of one or more countries exiting the Eurozone continue to cause uncertainty and act as a brake on business investment and consumer confidence.

The market for OE automotive semiconductors grew to an estimated USD 22.7 billion in 2011, from USD 20.8 billion in 2010.

Market Share Estimates for the Top Five Semiconductor Suppliers to the OE Automotive Sector in 2011

Renesas Electronics 13.6%
Infineon Technologies 9.8%
STMicroelectronics 8.9%
Freescale Semiconductor 8.1%
NXP Semiconductor 6.9%

Source: Semicast Research

www.semicast.net [1]

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[1] http://www.semicast.net