

OEM Semiconductor Spend Tracker w/ EMS & ODM Factory Location Database – 2017

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ACTUALS AND FORECAST

Frequency, Time Period

- Semi-annual releases, with quarterly interim report updates
- 7-year annual series (2012 - 2018)

Measures

- Company Revenue
- Company Headquarters Location
- System Net Revenue
- Net Spend
- Geographic Region
- Application Market
- Application Sub-Market
- Semiconductor Component Category
- Semiconductor Device Category
- Point of Consumption
 - OEM (In-house)
 - ODM
 - EMS

Regions, Markets

- Americas, Asia Pacific, EMEA (Europe, Middle East & Africa), Japan

ELECTRONICS EQUIPMENT MARKETS

- Automotive, Computer Peripherals, Computer Platforms, Consumer, Industrial, Wired Communications, Wireless Communications
- 39 Sub-market categories

SEMICONDUCTOR COMPONENTS

- Analog IC, Discretes, Logic IC, Memory, Microcomponent IC, Optical, Sensors and Actuators
- 28 Device categories

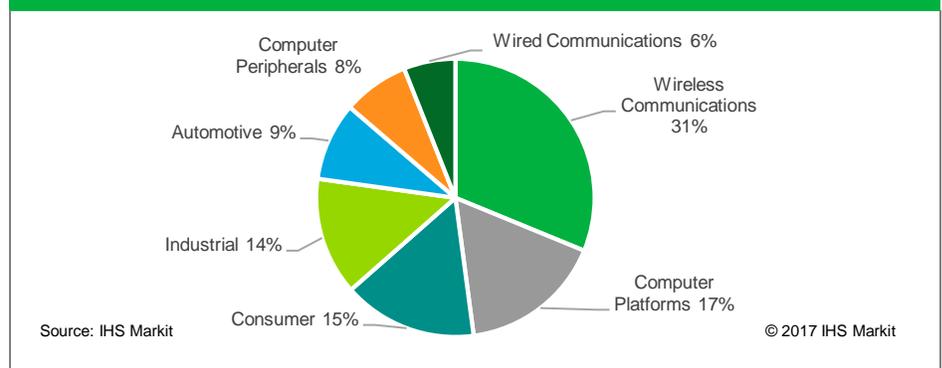
The most comprehensive product suite of its kind, the OEM Semiconductor Spend Tracker provides complete and detailed analysis of semiconductor procurement habits for over 230 of the top electronics OEM companies.

Whether you're interested in top-line numbers or a specific company's semiconductor purchasing trends, this tracker provides you with key benchmark metrics that allow you to better plan your sales and marketing strategies, allocate your selling resources, and identify potential design-win opportunities.

OEM Semiconductor Spend Tracker contains both qualitative and quantitative research elements to best serve your needs. The database tool in Excel pivot table format allows you to examine the dataset in a myriad of ways - quickly drilling down to the information you need.

The EMS & ODM Factory Location Database, authored by IHS Markit Sr. Principal Analyst Dan Panzica, contains detailed factory location analysis for over 300 OEM/EMS/ODM electronics companies around the world.

Worldwide Semiconductor Spending by Equipment Market, Top Electronics OEMs



Key Issues Addressed

- On which customers should I focus my selling resources?
- As a buyer of semiconductors, how does my market power compare to other OEMs?
- To what degree does my OEM customer outsource, and how does that affect my selling process?
- Who are the top prospects in the various regions? For the various chip types?
- Where should we align our resources – technical support, sales support or customer service?

Applicable To

- Semiconductor Suppliers
- OEMs
- Design Firms
- EMS Providers
- Electronics Distributors
- Material Suppliers
- Governmental Agencies
- Academic Institutions

LEAD ANALYSTS

Myson Robles-Bruce

Myson Robles-Bruce is a Principal Analyst with responsibility for the OEM Semiconductor Spend and Design Activity research area, and also leads production of the Application Market Forecast Tool (AMFT). He brings more than 17 years of experience to IHS Markit.

Mr. Robles-Bruce began his career in electronics market research and analysis at Apple and since that time has authored numerous reports and articles for publication.

Prior to joining IHS Markit, he gained valuable experience in the semiconductor industry at National Semiconductor, and at Databeans, where he was the first employee hired, and a major contributor to the development of that company.

Among other degrees, Mr. Robles-Bruce holds an MBA from Azusa Pacific University, and a Master of Library and Information Science (MLIS) from San Jose State University.

Chee Seng Tan

Chee Seng Tan is a researcher and analyst for the global semiconductor value chain, consisting of market shares, applications forecasts and design activity products at IHS Markit in Penang, Malaysia.

His responsibilities include tracking and analyzing global OEMs semiconductor purchasing trends, their design influence and R&D center locations.

Mr. Tan graduated from Liverpool John Moores University with Master and Bachelor degrees in Microelectronics.

He is fluent in English, Chinese Mandarin and Malay.

Methodology

Spending estimates were prepared using systems revenue and/or unit data and applying semiconductor content ratios to the data. These ratios were obtained from the IHS Markit Application Market Forecast Tool and various other research methods including examining bill-of-materials and teardowns. The assumptions were further fine-tuned based on the product mix and design preference of the individual OEM/Brand. This initial model data was then augmented by input on spending from the OEM/Brand themselves, suppliers, or other industry sources.

How "Spending" is Defined

In order to properly account for chip consumption by certain companies, IHS Markit has eliminated the double accounting of purchased "branded" subsystems such as storage systems, monitors, mice, keyboards, etc. Also, many companies engage in buy-resell activities to round out product lines. For this analysis, purchases of notebook computers and handsets from ODMs are considered as part of the OEM supply chain.

Semiconductor Spend Estimates

IHS Markit used its extensive databases on semiconductor content of various system types as the primary first pass method of determining the chip spend by account. These numbers were then modified by various primary research methods (primarily interviews). IHS Markit analysts who are experts in systems markets, EMS/ODM outsourcing, and semiconductor devices were also utilized to ensure quality.

Regional and EMS/ODM Estimates

Inputs for these estimates were obtained from the actual companies and from analyst disclosures and various secondary sources. IHS Markit also uses its own Competitive Landscape Tool and Application Market Forecast Tool to provide regional chip shipment guidelines. Regional spend guidelines were created using research and data on semiconductor spending from the IHS Markit EMS & ODM Factory Location Database.

Executive Summary and Monthly Market Insights

OEM Semiconductor Spend Tracker Executive Summary reports go together hand in hand with the databases, offering qualitative opinionated research that highlights trends in OEM semiconductor spending.

Online research area is updated monthly with Market Insight articles covering special topics of interest to subscribing clients. These articles often contain the latest semiconductor spending data available for OEMs, application markets, and components.

TRAX Online

TRAX offers Web-based interactive customization and visual charting of OEM Semiconductor Spend Tracker data.

Commentary from IHS Markit analysts attending Mobile World Congress and their insights on all things mobile

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