

## **TSIA Q2 2020 Statistics on Taiwan IC Industry**

August 11, 2020

According to WSTS, Q2 2020 worldwide semiconductor revenue reached US\$103.6 billion, a year-to-year growth of 5.1% and down 0.9% on-quarter. Sales quantity reached 218.7 billion ICs, a 2.7% decrease on-year and down 2.4% on-quarter. ASP was US\$0.474, an 8.1% increase on-year and up 1.5% on-quarter.

Semiconductor revenue in the US reached US\$22.8 billion in Q2 2020, a 29% growth on-year and up 3.1% on-quarter. Revenue in Japan reached US\$8.7 billion, a 2.2% decrease on-year and up 0.5% on-quarter. Revenue in Europe reached US\$8.1 billion, a 17.1% drop on-year and down 19.9% on-quarter. Revenue in China reached US\$36.8 billion, a 4.7% rise on-year and up 6.6% on-quarter. Revenue in Asia (excluding China) reached US\$27.1 billion, a 0.4% increase on-year and down 6.7% on-quarter.

The TSIA survey showed that Q2 2020 Taiwan IC revenue as a whole (including design, manufacturing, packaging and testing) totaled NT\$749.7 billion (US\$24.3B) (up 3.6% on-quarter and 19.9% increase on-year), with NT\$187.9B in design (US\$6.1B) (7.7% increase on-quarter and up 10.6% on-year), NT\$427.3B in manufacturing (US\$13.8B) (1.9% increase on-quarter and up 27% on-year) (Foundry NT\$382.8B (US\$12.4B), 1.1% growth on-quarter and up 28% on-year; Memory and other manufacturing products NT\$44.5B (US\$1.4B), 9.3% increase on-quarter and up 19.0% on-year), NT\$91.0B in packaging (US\$2.9B) (1.7% growth on-quarter and up 12.3% on-year), and NT\$43.5B in testing (US\$1.4B) (7.4% increase on-quarter and up 14.5% on-year). Exchange rate NT\$/US\$ is 30.9.

Taiwan IC revenue in 2020 is expected to reach NT\$3,001.9B (US\$97.1B) (12.6% growth from 2019), with NT\$768.4B in design (US\$24.9B) (10.9% increase), NT\$1,702.5B in manufacturing (US\$55.1B) (15.7% growth, Foundry NT\$1,531.4B (US\$49.6B), up 16.7%; Memory and other manufacturing products NT\$171.1B (US\$5.5B), up 7.2%), NT\$361.0B in packaging (US\$11.7B) (4.2% increase), and NT\$170.0B in testing (USD\$5.5B) (up 10.1%). Exchange rate NT\$/US\$ is 30.9.

## Major Indices of Taiwan IC Industry

NT\$B	20Q1	20Q1 /19Q4	20Q1 /19Q1	20Q2	20Q2 /20Q1	20Q2 /19Q2	20Q3	20Q3 /20Q2	20Q3 /19Q3	20Q4	20Q4 /20Q3	20Q4 /19Q4	2020(e)	20/19(e)
Industry Revenue	723.8	-4.0%	28.3%	749.7	3.6%	19.9%	794.1	5.9%	10.0%	734.3	-7.5%	-2.7%	3,001.9	12.6%
IC Design	174.5	-7.7%	18.1%	187.9	7.7%	10.6%	215.0	14.4%	15.6%	191.0	-11.2%	1.0%	768.4	10.9%
IC Manufacturing	419.3	-1.6%	36.6%	427.3	1.9%	27.0%	443.6	3.8%	10.2%	412.3	-7.1%	-3.3%	1,702.5	15.7%
Foundry	378.6	-1.7%	39.0%	382.8	1.1%	28.0%	400.0	4.5%	12.3%	370.0	-7.5%	-3.9%	1,531.4	16.7%
Memory & Other Manufacturing	40.7	-1.2%	18.0%	44.5	9.3%	19.0%	43.6	-2.0%	-6.2%	42.3	-3.0%	2.7%	171.1	7.2%
IC Packaging	89.5	-7.3%	18.9%	91.0	1.7%	12.3%	91.5	0.5%	-2.1%	89.0	-2.7%	-7.8%	361.0	4.2%
IC Testing	40.5	-4.7%	18.1%	43.5	7.4%	14.5%	44.0	1.1%	11.1%	42.0	-4.5%	-1.2%	170.0	10.1%
Product Revenue	215.2	-6.6%	18.0%	232.4	8.0%	12.1%	258.6	11.3%	11.2%	233.3	-9.8%	1.3%	939.5	10.2%
WW Revenue (US\$B) & Growth (%)	-	-	-	-	-	-	-	-	-	-	-	-	426.0	3.3%

## 2016-2020 IC Revenue

NT\$B	2016	16/15	2017	17/16	2018	18/17	2019	19/18	2020(e)	20/19(e)
Industry Revenue	2,449.3	8.2%	2,462.3	0.5%	2,619.9	6.4%	2,665.6	1.7%	3,001.9	12.6%
IC Design	653.1	10.2%	617.1	-5.5%	641.3	3.9%	692.8	8.0%	768.4	10.9%
IC Manufacturing	1,332.4	8.3%	1,368.2	2.7%	1,485.6	8.6%	1,472.1	-0.9%	1,702.5	15.7%
Foundry	1,148.7	13.8%	1,206.1	13.8%	1,285.1	6.6%	1,312.5	2.1%	1,531.4	16.7%
Memory & Other Manufacturing	183.7	-16.8%	162.1	-11.8%	200.5	23.7%	159.6	-20.4%	171.1	7.2%
IC Packaging	323.8	4.5%	333.0	2.8%	344.5	3.5%	346.3	0.5%	361.0	4.2%
IC Testing	140.0	6.5%	144.0	2.9%	148.5	3.1%	154.4	4.0%	170.0	10.1%
Product Revenue	836.8	2.9%	779.2	-6.9%	841.8	8.0%	852.4	1.3%	939.5	10.2%
WW Revenue (US\$B) & Growth (%)	338.9	1.1%	412.2	21.6%	468.8	13.7%	412.3	-12.0%	426.0	3.3%

(e): estimate

Source : TSIA, IEK-ITRI (August 2020)

Note:

- IC Industry Revenue = IC design + Manufacturing + Packaging + Testing
- IC Production Revenue = IC Design + Memory and other manufacturing products
- IC Manufacturing Revenue = Foundry + Memory and other manufacturing products
- Revenue of Inotera (acquired by Micron) was excluded from Taiwan Memory revenue from 2017.
- Only companies headquartered in Taiwan are included in this report.

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