RESEARCH BULLETIN

IC Insights

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Intel Extends Lead Over Samsung in 1Q11 Top 20 Semi Ranking!

Toshiba moves into third place, Nvidia jumps into top 20, and Elpida falls four places.

A ranking of the 1Q11 top semiconductor suppliers is included as part of IC Insights' soon-to-be-released May *Update* to *The McClean Report*. As shown in Figure 1, Intel remained firmly in control of the number one spot in the ranking. In fact, Intel extended its lead over second-ranked Samsung by registering a 44% higher sales level than Samsung in 1Q11 as compared to a 24% margin for all of 2010.

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Nvidia's 1Q11/1Q10 sales declined by 6%, but it replaced Panasonic, whose 1Q11/1Q10 sales declined by 9%, in the top 20 ranking. As shown in Figure 1, there are two pure-play foundries in the top 20 ranking. Excluding these two foundry companies, Marvell and ON Semiconductor would have been included in the top 20 ranking. It should be noted that with ON's purchase of Sanyo Semiconductor in 1Q11, its 1Q11/1Q10 semiconductor sales jumped by 58% (from $550 million in 1Q10 to $$871 in 1Q11).

In total, the top 20 semiconductor suppliers showed an 11% increase in 1Q11 sales as compared to 1Q10. This growth rate is one point greater than IC Insights' full-year 2011 worldwide semiconductor market forecast of 10%.

As shown in Figure 2, there was a wide range of year-over-year growth rates among the top 20 suppliers in 1Q11. Unlike last year, the memory companies did not secure the top growth rate positions. In fact, the top six 1Q11/1Q10 growth rate increases were logged by non-memory suppliers.

Of the big five memory suppliers in the top 20 ranking (i.e., Samsung, Toshiba, Hynix, Micron, and Elpida), all but Elpida registered 1Q11/1Q10 growth. However, with strong results from their flash memory products helping to offset weakness in their DRAM segments, Samsung, Micron, and Toshiba were each able to display double-digit 1Q11/1Q10 semiconductor sales increases. In contrast, DRAM-dependent Elpida registered the worst 1Q11/1Q10 performance with a 31% drop in revenue.

Among the top 20 suppliers, only seven companies outperformed the total worldwide semiconductor industry 1Q11/1Q10 growth rate of 10%. Of the top seven performers, there was only one memory producer—Samsung. The remaining top performing companies included MPU supplier Intel, pure-play foundry TSMC, and logic-intensive suppliers like Broadcom, Qualcomm, Fujitsu, and Freescale.

1Q11 Top 20 Semiconductor Sales Leaders ($M)

1Q11 Rank	2010 Rank	Company	Headquarters	2010 Tot Semi	1Q10 Tot Semi	1Q11 Tot Semi	1Q11/1Q10 % Change
1	1	Intel	U.S.	40,154	9,485	11,819	25%
2	2	Samsung	South Korea	32,455	7,132	8,185	15%
3	5	Toshiba	Japan	13,028	3,240	3,550	10%
4	3	TSMC*	Taiwan	13,307	2,885	3,392	18%
5	4	TI	U.S.	13,037	2,990	3,167	6%
6	6	Renesas	Japan	11,650	2,787	3,032	9%
7	8	ST	Europe	10,346	2,311	2,508	9%
8	7	Hynix	South Korea	10,432	2,455	2,490	1%
9	9	Micron	U.S.	9,092	2,077	2,295	10%
10	10	Qualcomm**	U.S.	7,204	1,608	1,962	22%
11	11	Broadcom**	U.S.	6,589	1,404	1,752	25%
12	12	AMD**	U.S.	6,494	1,574	1,613	2%
13	14	Infineon	Europe	6,049	1,438	1,358	-6%
14	15	Sony	Japan	5,645	1,520	1,310	-14%
15	16	Freescale	U.S.	4,357	998	1,167	17%
16	18	Fujitsu	Japan	4,147	978	1,148	17%
17	13	Elpida	Japan	6,446	1,625	1,115	-31%
18	17	NXP	Europe	4,321	1,079	1,036	-4%
19	19	UMC*	Taiwan	3,965	870	945	9%
20	23	Nvidia**	U.S.	3,575	996	936	-6%
Top 20 Total				212,293	49,452	54,780	11%

*Foundry **Fabless

Source: IC Insights, company reports

Figure 1

1Q11 Top 20 Semiconductor Sales Leaders
Ranked by Growth ($M)

1Q11 Rank	Company	Headquarters	1Q10 Tot Semi	1Q11 Tot Semi	1Q11/1Q10 % Change
1	Broadcom**	U.S.	1,404	1,752	25%
2	Intel	U.S.	9,485	11,819	25%
3	Qualcomm**	U.S.	1,608	1,962	22%
4	TSMC*	Taiwan	2,885	3,392	18%
5	Fujitsu	Japan	978	1,148	17%
6	Freescale	U.S.	998	1,167	17%
7	Samsung	South Korea	7,132	8,185	15%
8	Micron	U.S.	2,077	2,295	10%
9	Toshiba	Japan	3,240	3,550	10%
10	Renesas	Japan	2,787	3,032	9%
11	UMC*	Taiwan	870	945	9%
12	ST	Europe	2,311	2,508	9%
13	TI	U.S.	2,990	3,167	6%
14	AMD**	U.S.	1,574	1,613	2%
15	Hynix	South Korea	2,455	2,490	1%
16	NXP	Europe	1,079	1,036	-4%
17	Infineon	Europe	1,438	1,358	-6%
18	Nvidia**	U.S.	996	936	-6%
19	Sony	Japan	1,520	1,310	-14%
20	Elpida	Japan	1,625	1,115	-31%
Top 20 Total			49,452	54,780	11%

**Fabless

Source: IC Insights, company reports

Figure 2

Report Details:

IC Insights has released the new 2011 edition of *The McClean Report*. Packed with 363 tables and graphs, the 2011 *McClean Report* subscription also comes with free monthly updates by e-mail from March-November (including a 200+ page *Mid-Year Report*). A single-user subscription to the 2011 edition of *The McClean Report* is priced at $3,190 and includes an Internet access password. The subscription is also available under a multi-user worldwide corporate license for $6,290.

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IC Insights, Inc., based in Scottsdale, Arizona USA, is dedicated to providing high-quality, cost-effective market research for the semiconductor industry. Founded in 1997, IC Insights offers coverage of global economic trends, the semiconductor market forecast, capital spending and fab capacity trends, product market details, and technology trends, as well as complete IC company profiles and evaluations of end-use applications driving demand for ICs.

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