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17 Semiconductor Companies Forecast to Have >\$10.0 Billion in Sales This Year

AMD, NXP, and Analog Devices are expected to join the ranks of the "megasuppliers" in 2021.

IC Insights is updating its comprehensive forecasts and analyses of the IC industry for its 25th edition of *The McClean Report*, which will be released in January 2022.

Throughout next year, the report will include updated quarterly rankings of the worldwide top-25 semiconductor suppliers.

The 17 companies forecast to have worldwide semiconductor (IC and O-S-D—optoelectronic, sensor, and discrete) sales of >\$10.0 billion in 2021 are shown in Figure 1. Three additional semiconductor companies—AMD, NXP, and Analog Devices—are expected to join the noteworthy "megasuppliers" list in 2021.

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Semiconductor Companies with >\$10 Billion in Sales in 2021F

2021F Rank	2020 Rank	Company	Headquarters	2020 Total IC	2020 Total O-S-D	2020 Total Semi	2021F Total IC	2021F Total O-S-D	2021F Total Semi	2021/2020 % Change
1	2	Samsung	South Korea	58,555	3,298	61,853	78,850	4,235	83,085	34%
2	1	Intel	U.S.	76,328	0	76,328	75,550	0	75,550	-1%
3	3	TSMC (1)	Taiwan	45,572	0	45,572	56,633	0	56,633	24%
4	4	SK Hynix	South Korea	26,094	981	27,075	35,628	1,639	37,267	38%
5	5	Micron	U.S.	22,542	0	22,542	30,087	0	30,087	33%
6	6	Qualcomm (2)	U.S.	19,357	0	19,357	29,136	0	29,136	51%
7	8	Nvidia (2)	U.S.	14,659	0	14,659	23,026	0	23,026	57%
8	7	Broadcom Inc. (2)	U.S.	15,941	1,803	17,744	18,864	2,099	20,963	18%
9	12	MediaTek (2)	Taiwan	10,985	0	10,985	17,551	0	17,551	60%
10	9	TI	U.S.	12,731	843	13,574	15,889	1,015	16,904	25%
11	15	AMD (2)	U.S.	9,763	0	9,763	16,108	0	16,108	65%
12	11	Infineon	Europe	7,542	3,683	11,225	9,113	4,503	13,616	21%
13	10	Apple* (2)	U.S.	11,440	0	11,440	13,430	0	13,430	17%
14	14	ST	Europe	6,804	3,374	10,178	8,400	4,174	12,574	24%
15	13	Kioxia	Japan	10,553	0	10,553	12,132	0	12,132	15%
16	17	NXP	Europe	7,582	809	8,391	9,711	1,004	10,715	28%
17	19	Analog Devices (3)	U.S.	7,722	405	8,127	9,575	504	10,079	24%
—	—	Top-25 Total		364,170	15,196	379,366	459,683	19,173	478,856	26%

(1) Foundry

(2) Fabless

(3) Includes acquired company's sales in 2020 and 2021 results.

Source: Company reports, IC Insights

*Custom devices for internal use.

Figure 1

These megasuppliers include nine suppliers headquartered in the U.S., three in Europe, two in Taiwan and South Korea, and one in Japan. The list includes six fabless companies (Qualcomm, Nvidia, Broadcom, MediaTek, AMD, and Apple) and one pure-play foundry (TSMC). In total, the megasuppliers' sales are expected to jump by 26% in 2021 compared to 2020, one point greater than the forecasted total worldwide semiconductor industry 2021/2020 increase of 25%.

In order to make the year-over-year growth rate comparisons more reflective of actual growth, the sales figures include each company's semiconductor sales from acquisitions in 2020 and 2021 regardless of when the acquisition was finalized. For example, Analog Devices officially closed its deal to acquire Maxim on August 25, 2021. However, IC Insights added Maxim's full-year 2020 IC sales of \$2,354 million to Analog Devices' 2020 semiconductor sales for a total of \$8,127 million. Moreover, \$665 million was added to Analog Devices' 1Q21 sales to account for Maxim's 1Q21 revenue with another \$720 million added to Analog Devices' 2Q21 sales to reflect Maxim's semiconductor sales in that timeperiod. Since the deal was finalized at the end of August, about two-thirds the way through 3Q21, \$500 million in sales was added to Analog Devices' 3Q21 sales. With these adjustments, Analog Devices' 2021/2020 semiconductor sales are forecast to jump by 24%.

Growth rates among the 17 2021 megasuppliers are expected to range from AMD's 65% to Intel's -1%. Four companies—AMD, MediaTek, Nvidia, and Qualcomm—are forecast to post a sales gain of greater than 50% this year.

Samsung's semiconductor sales are forecast to be nearly \$83.1 billion in 2021, making it the largest semiconductor supplier this year. Driven by a resurgent memory market and relatively flat sales results from Intel, Samsung once again replaced Intel as the leading semiconductor producer beginning in 2Q21 (Figure 2). With the DRAM market NAND flash markets showing strong growth in 2021, Samsung is forecast to register a 34% increase in 2021/2020 sales and open up a \$7.5 billion lead over second-ranked Intel this year.

Samsung Displaces Intel Again for Top Spot in Semiconductor Sales in 2021

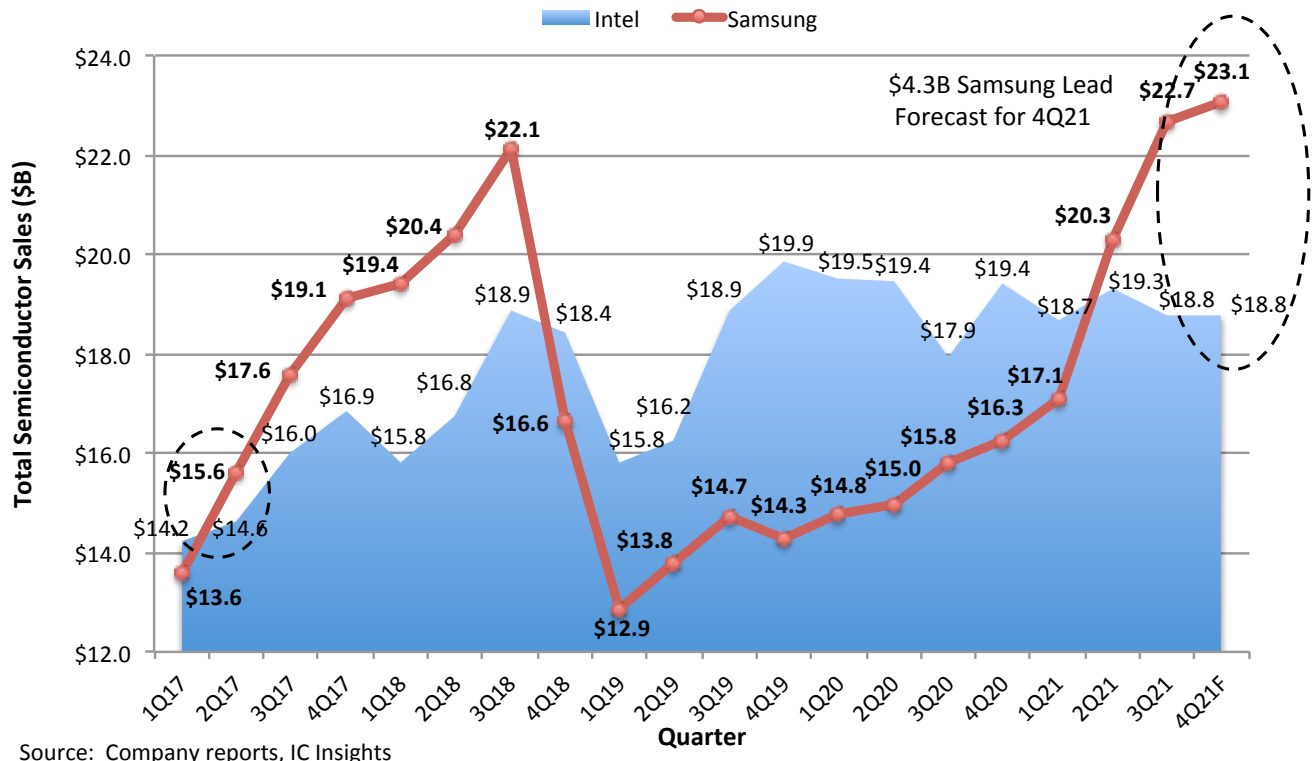


Figure 2

Report Details: *The 2022 McClean Report*

The 2022 edition of *The McClean Report—A Complete Analysis and Forecast of the Semiconductor Industry*, will be released in January 2022. A subscription to *The McClean Report* service includes the January *Semiconductor Industry Flash Report*, which provides clients with IC Insights' initial overview and annual forecast of the semiconductor industry for the upcoming year and through 2026. In addition to the January *Semiconductor Industry Flash Report*, *Quarterly Updates* to the report will be released in February, May, August, and November of next year. An individual user license to the 2022 edition of *The McClean Report* is available for \$5,390 and a multi-user worldwide corporate license is available for \$8,590. The Internet access password and the information accessible to download will be available through November 2022.

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About IC Insights

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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