



China IC Design Industry Report, 2010

Jan. 2011

This report

- ◆ **Analyzes the status quo and development of the global and China IC design industry**

- ◆ **Focuses on the basic IC design enterprises, Communication IC Design Enterprises, Multimedia IC Design Enterprises , Smart Card IC Design Enterprises, also other IC design enterprises**

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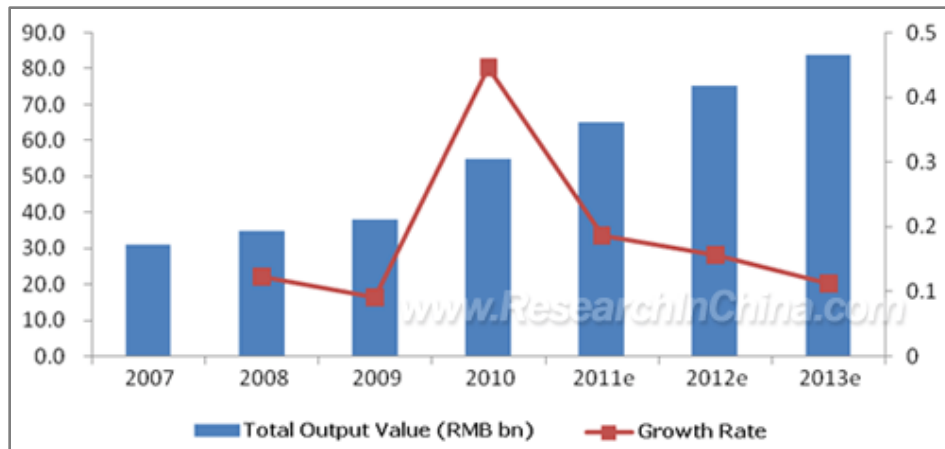
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Abstract

China's IC design industry has been progressing rapidly, with an annual compound growth rate of 38% during 2001-2009. In 2009, the operating income of Chinese IC design companies climbed 15%, while that of global IC industry dropped 11%.

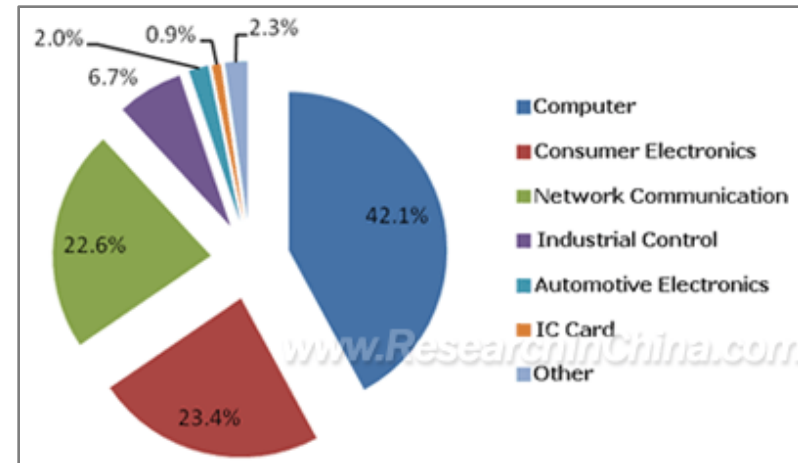
China's semiconductor downstream market demand is flourishing; computer remains the largest application field, followed by consumer electronics and network communication devices.

Total Output Value and Growth Rate of Chinese IC Design Industry, 2007-2013E (Unit: RMB bn, %)



Source: ResearchInChina

Application Structure of Chinese IC Market, 2010



Source: ResearchInChina

Chinese IC design enterprises are still weak. In 2009, the revenue of HiSilicon Technologies Co., Ltd., the largest IC design enterprise in China, was merely 1/5 of that of the world's No.10 IC design enterprise and even 1/40 of that of the global No.1 IC design enterprise.

There were only 5 Chinese Mainland IC design companies each with revenue exceeding US\$100 million in 2009, but there were 10 in 2010, and except Nationz Technologies, HiSilicon Technologies Co., Ltd., and Shenzhen State Micro Technology Co., Ltd. (SMiT), the rest 7 were related to mobile phone industry.

Ingenic Semiconductor Co., Ltd., a supplier of 32-bit embedded CPU products, ranked the third in China's consumer electronics chip market and the first in educational electronics chip market in 2009, and it will go public in Growth Enterprises Market (GEM) Board in 2011. Furthermore, such traditional basic IC design companies as Shanghai Belling Co., Ltd., China Resources Microelectronics Limited, Jilin Sino-Microelectronics Co., Ltd. (JSMC), and Solomon Systech (International) Limited have tapped into the fields of new display, automotive

electronics, MEMS, etc. while maintaining traditional IC business, and each of them obtained a net income growth rate of over 100% across the first three quarters of 2010.

IC Design Companies with the Revenue Surpassing US\$100M in China, 2010

No.	Company	Revenue (Unit: US\$100M)
1	Spreadtrum Communications (Shanghai) Co., Ltd.	3.45
2	RDA Microelectronics (Shanghai) Inc.	2.1
3	BYD Company Limited	1.5
4	Telegent Systems (Shanghai)	1.4
5	GalaxyCore Inc.	1.3
6	Leadcore Technology Co., Ltd.	1.3
7	Nationz Technologies	1.1
8	HiSilicon Technologies Co., Ltd.	1.0
9	SMiT	1.0
10	Vimicro Corporation	1.0

Source: www.laoyaoba.com

In the field of network communication IC design, RDA Microelectronics, listed on Nasdaq in 2010, has blossomed into a powerful RF IC company in China. Huawei has no longer completely relied on the WCDMA mobile phone chip of Qualcomm after that of HiSilicon Technologies Co., Ltd. was successfully developed. In Q3 2010, the market share of Spreadtrum Communications in 2G mobile phone chip advanced to 22% from 5% in a year ago.

In the field of multimedia IC design, besides traditional companies such as Vimicro Corporation, Hangzhou Silan Microelectronics Co., Ltd (Silan), and Actions Semiconductor Co., Ltd., companies like Telegent Systems (Shanghai), Haier (Beijing) IC Design Company Ltd, Hangzhou Nationalchip Science & Technology Co., Ltd., and Montage Technology have developed rapidly and been equipped with comparatively powerful design capability.

In the field of smart card IC design, the market share of local chip manufacturers is rising, but the high-order smart card and large capacity chip still depend on overseas manufacturers. Local smart card IC enterprises cover Datang Microelectronics Technology Co., Ltd. (DMT), Beijing Tongfang Microelectronics Co., Ltd. (TMC), Shanghai Fudan Microelectronics Group Co., Ltd., Invengo Information Technology Co., Ltd., etc.

And in other fields of IC design, lots of excellent local IC companies have sprung up, including Zhuhai Orbita Control Engineering Co., Ltd. specializing in highly reliable embedded SOC chip products, Beijing Fuxing Xiaocheng Electronic Technology Stock Co., Ltd. specializing in smart ammeter IC, and Qingdao Eastsoft Communication Technology Co., Ltd. engaged in power line communication chip design.

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