

2009 Automotive Infotainment Semiconductors

Automotive Markets – Worldwide



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Susie Inouye

Myson Robles-Bruce

Matt Scherer

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Reno, NV 89523

Phone: 775.624.6200

www.databeans.net

Abstract

It's no great secret that the world's top automobile manufacturers are reeling after a particularly bad 2008 that dropped total autos shipped to 65.6 million from 69.1 million in 2007. As difficult as 2008 was, 2009 is predicted to be even worse with 63.2 million autos to ship by year's end. This underscores an industry downturn in mature regions such as the United States, European Union, and Japan that is now spreading to previously fast growing new markets, such as India and China, because of the global financial and lending markets which has significantly affected GDP growth and caused many consumers to hold off of purchasing a new vehicle in the short term.

Part of the over \$800 billion automotive market is the automotive semiconductor market. This segment of the \$200 billion chip industry was just over \$20 billion in 2008 and expected to contract to \$15 billion this year. Automotive semiconductors include optoelectronics, discretives, sensors, and integrated circuits, including microcontrollers, logic, power management, mixed signal products and memory. The market for semiconductors in the automotive industry is growing at an average annual growth rate of 9 percent each year, faster than vehicle production and slightly faster than automotive electronics revenue.

Even though electronic content is steadily rising in cars and trucks, cost containment is a critical industry issue. 2008 was a difficult year for these major automotive electronics suppliers as global vehicle production and consumption fell drastically, and 2009 is shaping up to be even worse with a projected \$3.2 billion in total infotainment semiconductor revenue, a drop of 23 percent. However, in order to return to profitability, suppliers must take necessary painful steps in order to restructure their business models. Positive profits are predicted to return by 2010 and will experience growth of 10 percent annually over the forecasted period which will cause the market to reach \$5 billion by 2014.

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Publication Number: 09AUTO- Infotainment

Research Analyst: Susie Inouye

✉ sinouye@databeans.net

Research Analyst: Matt Scherer

✉ matt@databeans.net

Research Analyst: Myson Robles-Bruce

✉ myson@databeans.net
