

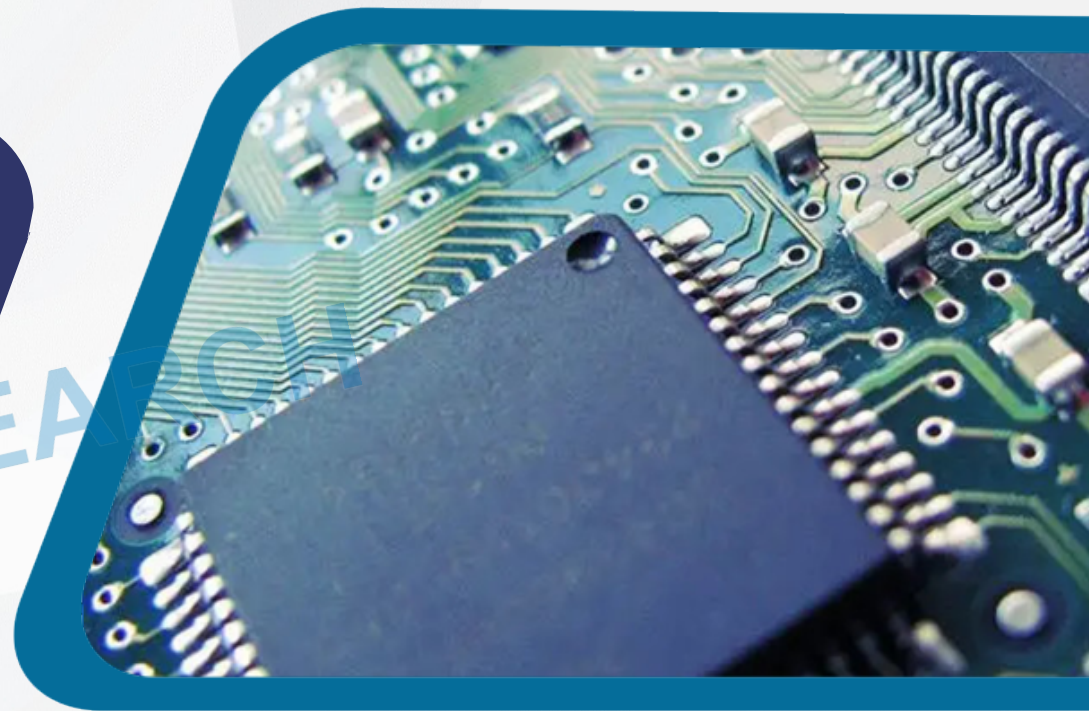


北京恒州博智国际信息咨询有限公司
QYResearch

全球知名的半导体行业咨询 公司

Semiconductor Market Research

网址: <https://www.qyresearch.com.cn>





公司简介

Who we are

QYResearch（北京恒州博智国际信息咨询有限公司）成立于2007年，总部位于美国洛杉矶和中国北京。经过连续18年多的沉淀，QYResearch是全球知名的大型咨询公司、具备全球高科技产业深度分析能力，并提供企业顾问咨询服务的研究机构。业务遍及世界160多个国家，在全球30多个国家有固定营销合作伙伴，在美国、欧洲、日本、韩国、印度、等有分支机构，在国内主要城市北京、石家庄、太原、大同、重庆、成都、长沙、武汉、昆明、广州、日照等地设有办公室和专业研究团队。

行业涵盖各高科技行业产业链细分市场，如半导体、消费电子、光电显示、化工材料、可再生能源、汽车科技、5G通信、人工智能、机器人、机械制造、食品药品、医疗器械、农业、石油天然气等。分析师团队来自各产业领域的精英，拥有深厚造诣和丰富研究经验。

半导体行业横跨半导体设备/零部件、半导体材料、IC设计、制造、封测、存储器、分立器件、传感器、光电显示、工程服务等。为全球及中国半导体产业链客户提供深度的市场调研服务，助力相关产业企业更快速发展。



服务范围

What we do

研究
报告

提供全球/中国市场调研报告

定制
咨询

根据客户需求，提供定制调研报告

竞争
分析

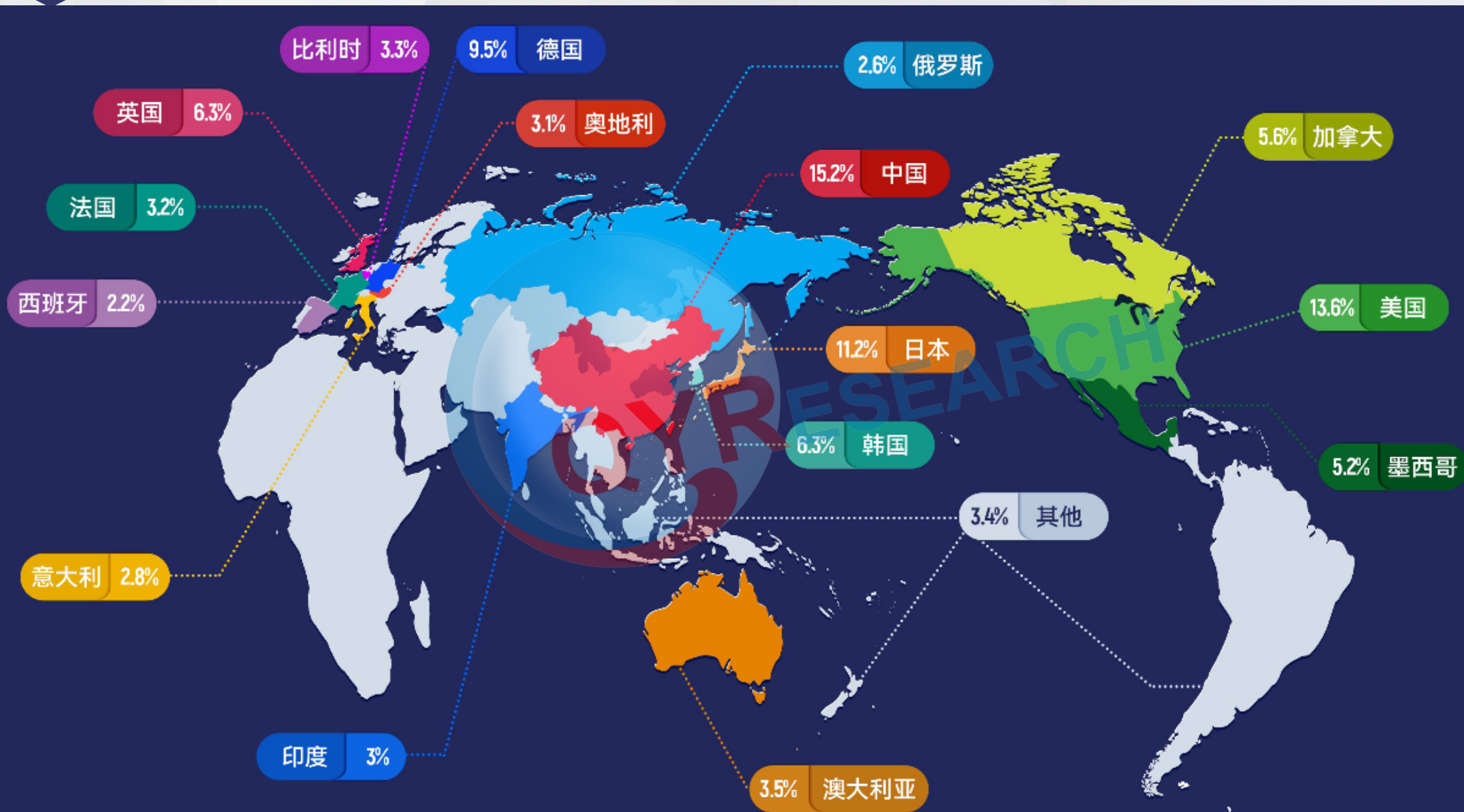
企业调研、份额、成本盈利、客户等

行业
分析

全球/地区规模、产销量、价格、进出口等



客户分布 Global Client Base





合作客户 Our Clients



全球客户数
突破**6.5万**



我们的理念

QYResearch珍视调研报告对于企业的重要价值，深耕细分行业调研领域17余年，持续积累、创新和完善研究方法，以专业求生存，以质量求发展，我们服务了全球超过65726家知名企业，并赢得了全球知名企业的信赖。

选择QYResearch，让我们与您紧密合作，共创辉煌、美好的未来！



半导体产业链

上游：半导体支撑产业

技术服务

软件工具

半导体材料

半导体设备

硅片

单晶炉

光刻胶

刻蚀机

光掩模

气相沉积设备

电子特种气体

光刻机

抛光材料

涂胶显影机

溅射靶材

检测设备

封装材料

清洗机

中游：半导体制造产业

集成电路设计

逻辑设计
电路设计

封装设计
输出版图

集成电路制造

光罩、护膜
切面、研磨、清洗
光罩校准
蚀刻

扩散、离子植入
气相沉积
氧化
晶圆测试

集成电路封测

晶圆切割
芯片粘接
引线焊接
光检

注塑
打码
电性测试
老化测试

下游：半导体产品终端应用

移动通信

个人电脑

大数据

云计算

人工智能

物联网

汽车电子

工业电子

虚拟现实

军事太空

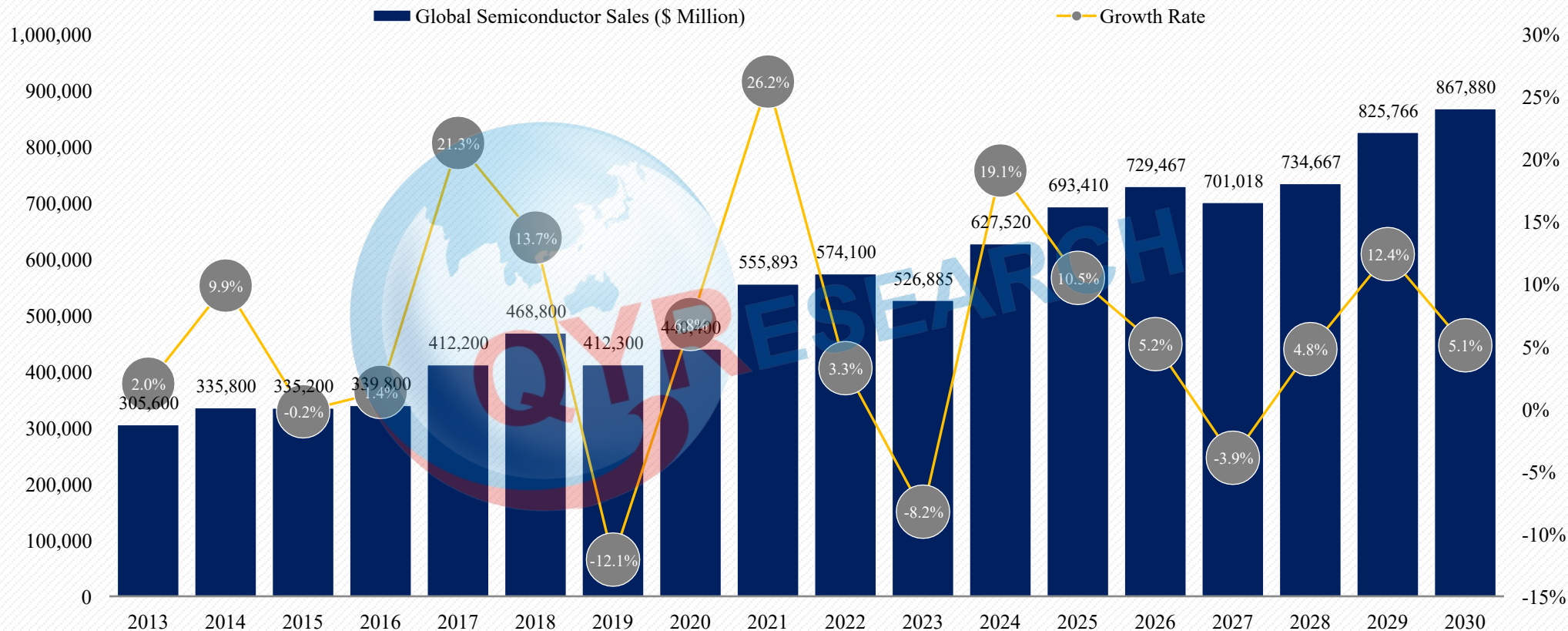
LED

OLED



半导体市场规模

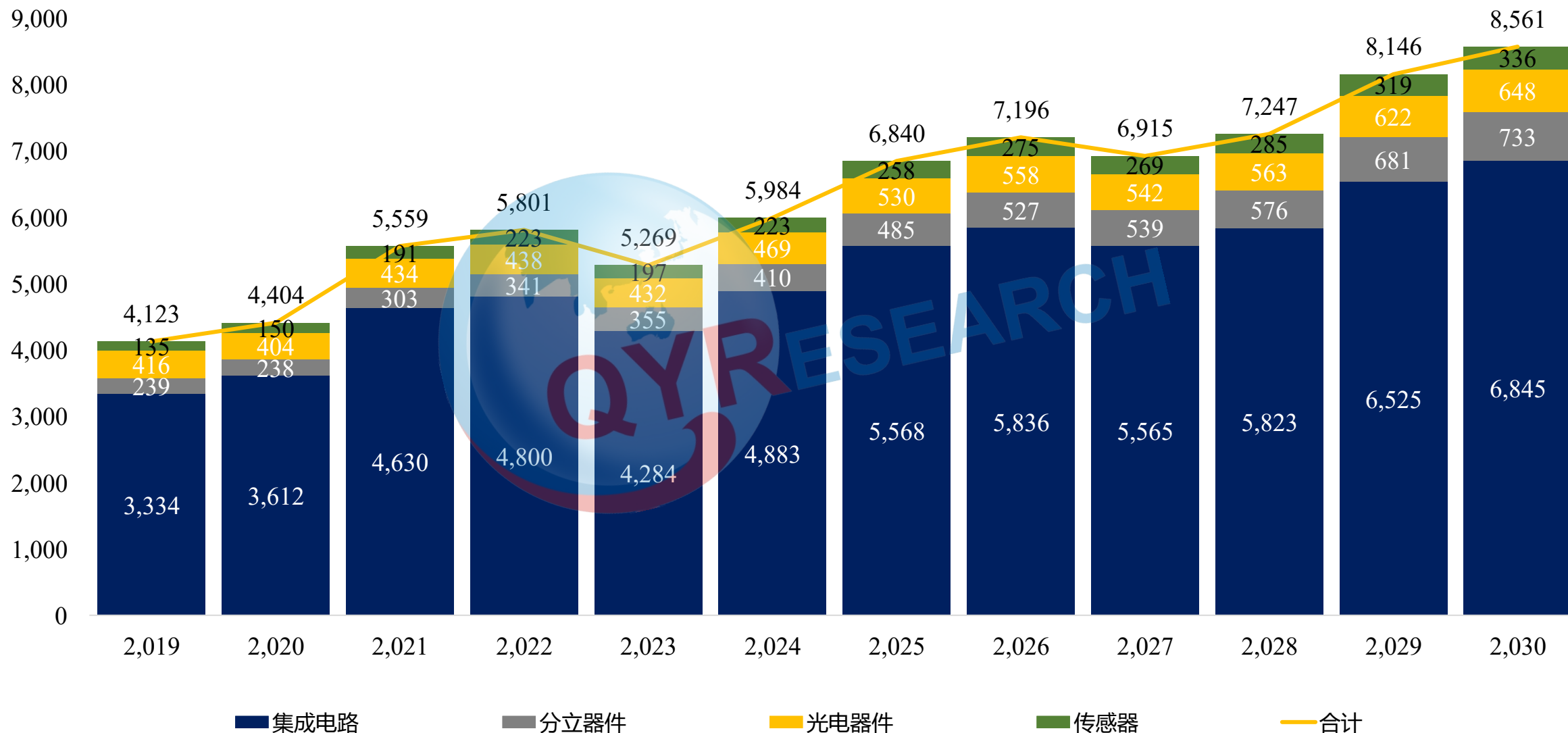
根据世界半导体贸易统计组织（WSTS），2024年全球半导体规模达到了6275亿美元。根据QYResearch预测，2030年全球半导体规模将达到8678亿美元。





半导体市场规模细分

根据世界半导体贸易统计组织（WSTS）数据，半导体细分领域，集成电路IC占比最高。





半导体-企业排名

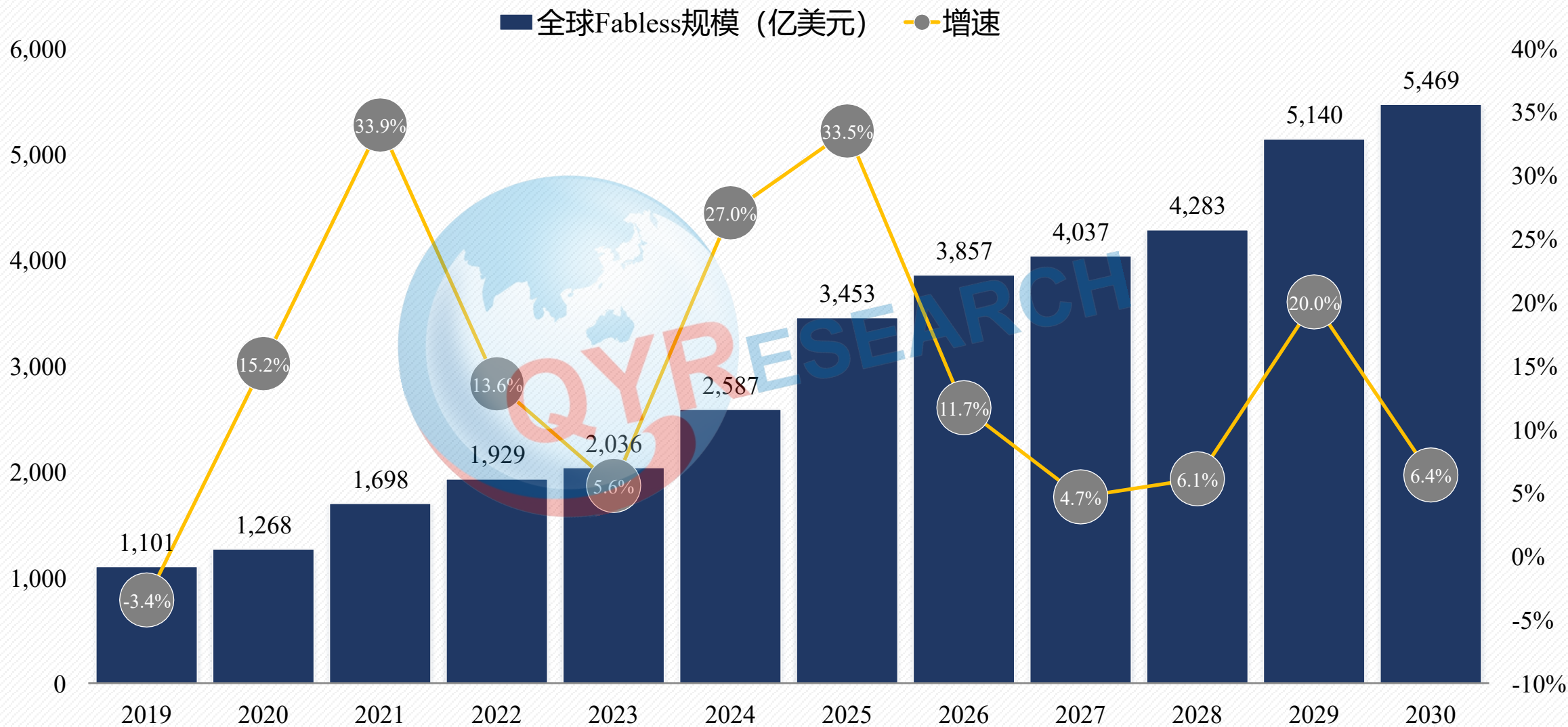
根据QYResearch调研，2023年全球半导体行业企业排名。

排名	企业名称	2023年半导体收入（百万美元）	2023年半导体收入份额	排名	企业名称	2023年半导体收入（百万美元）	2023年半导体收入份额
1	Intel	54,228	9.63%	31	Mitsubishi Electric	2,045	0.36%
2	Samsung	49,946	8.87%	32	Monolithic Power Systems, (MPS)	1,821	0.32%
3	NVIDIA	49,161	8.73%	33	Cirrus Logic, Inc.	1,789	0.32%
4	Qualcomm	30,382	5.40%	34	Vishay Intertechnology	1,712	0.30%
5	Broadcom	28,182	5.01%	35	Diodes Incorporated	1,662	0.30%
6	SK Hynix	24,574	4.36%	36	Fuji Electric	1,619	0.29%
7	AMD	22,680	4.03%	37	Socionext Inc.	1,571	0.28%
8	Texas Instruments (TI)	17,520	3.11%	38	LX Semicon	1,428	0.25%
9	Infineon	17,451	3.10%	39	Sanan Optoelectronics	1,417	0.25%
10	STMicroelectronics	17,239	3.06%	40	HiSilicon Technologies	1,390	0.25%
11	Micron Technology	15,540	2.76%	41	CR Micro	1,354	0.24%
12	MediaTek	13,827	2.46%	42	Synaptics	1,220	0.22%
13	NXP	13,276	2.36%	43	Hangzhou Silan	1,209	0.21%
14	Western Digital (WD)	12,318	2.19%	44	Allegro MicroSystems	1,049	0.19%
15	Analog Devices, Inc. (ADI)	12,306	2.19%	45	Nanya Technology	974	0.17%
16	Sony Semiconductor Solutions	11,379	2.02%	46	Himax Technologies	945	0.17%
17	Renesas Electronics	10,435	1.85%	47	Macronix	901	0.16%
18	Microchip Technology	8,439	1.50%	48	Semtech	869	0.15%
19	Onsemi	8,253	1.47%	49	Global Unichip Corporation (GUC)	855	0.15%
20	Kioxia	7,644	1.36%	50	Hygon Information Technology	835	0.15%
21	Marvell Technology Group	5,508	0.98%	51	GigaDevice	800	0.14%
22	Skyworks	4,772	0.85%	52	Littelfuse	767	0.14%
23	Novatek Microelectronics Corp.	3,588	0.64%	53	Yangzhou Yangjie Electronic	710	0.13%
24	Tsinghua Unigroup	3,216	0.57%	54	Silicon Motion	639	0.11%
25	Realtek Semiconductor	3,097	0.55%	55	Ingenic Semiconductor	628	0.11%
26	Toshiba	3,091	0.55%	56	Maxscend Technologies	608	0.11%
27	Rohm	2,905	0.52%	57	Raydium	598	0.11%
28	OmniVision Technology, Inc	2,492	0.44%	58	Goodix Limited	592	0.11%
29	Winbond	2,445	0.43%	59	Sitronix	545	0.10%
30	Nexperia	2,258	0.40%	60	Nordic Semiconductor	543	0.10%



半导体-Design

根据QYResearch调研，2023年全球半导体Fabless市场规模为2036亿美元，预计2030年将达到5469亿美元。





半导体-Fabless排名

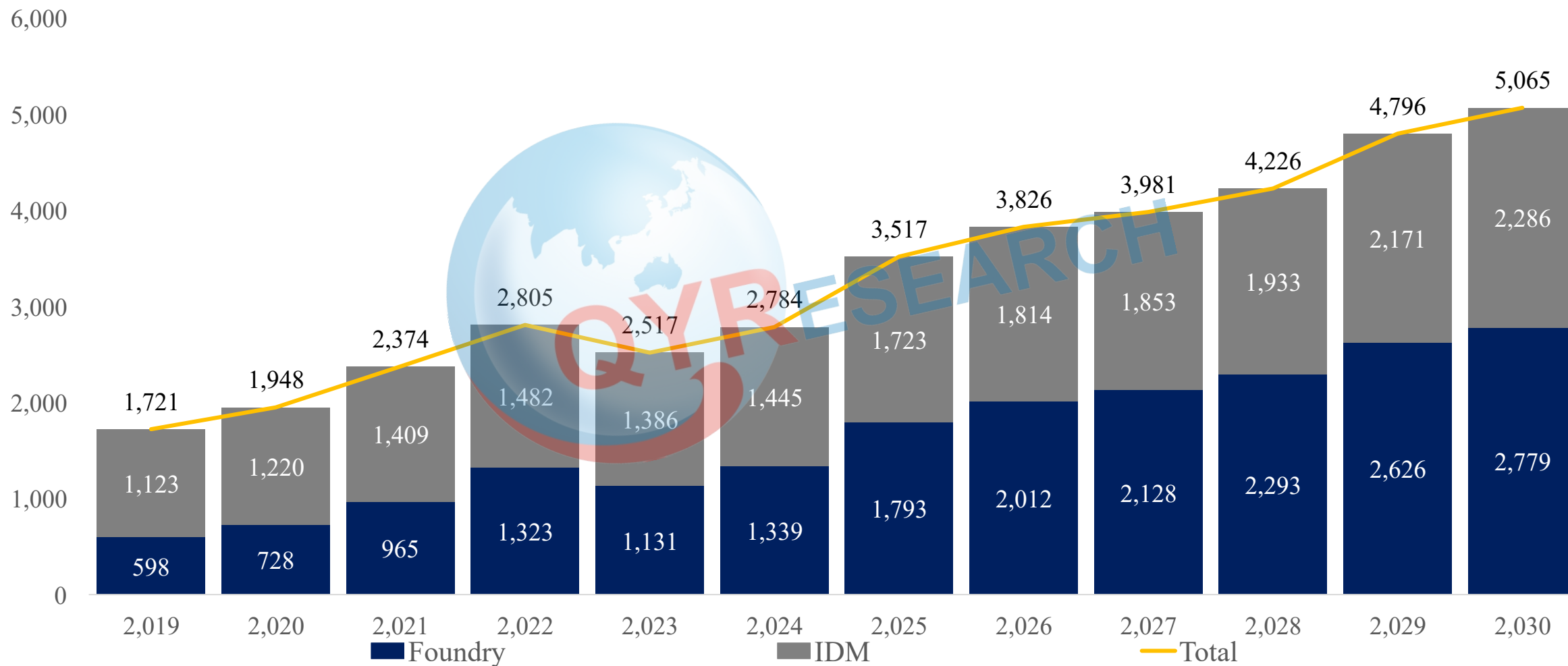
根据QYResearch调研，2023年全球半导体Fabless Top 3企业都分布在美国，其中英伟达占有全球超过20%的份额。

排名	企业名称	2023 Fabless收入（百万美元）	2023 Fabless份额	排名	企业名称	2023 Fabless收入（百万美元）	2023 Fabless份额
1	英伟达	49,161	24.14%	18	奇景光电	945	0.47%
2	高通	30,382	14.92%	19	Semtech	869	0.43%
3	博通	28,182	13.84%	20	創意電子	855	0.42%
4	AMD	22,680	11.14%	21	海光信息	835	0.41%
5	联发科	13,827	6.79%	22	兆易创新	800	0.39%
6	美满电子	5,508	2.71%	23	慧荣科技	639	0.31%
7	联咏科技	3,588	1.76%	24	北京君正	628	0.31%
8	新紫光集团	3,216	1.58%	25	瑞鼎科技	598	0.29%
9	瑞昱半导体	3,097	1.52%	26	汇顶科技	592	0.29%
10	韦尔股份	2,492	1.22%	27	矽創电子	545	0.27%
11	Monolithic Power Systems	1,821	0.89%	28	Nordic	543	0.27%
12	Cirrus Logic, Inc.	1,789	0.88%	29	矽力杰	503	0.25%
13	Socionext Inc.	1,571	0.77%	30	复旦微电子	464	0.23%
14	乐尔幸半导体	1,428	0.70%	31	世芯电子	447	0.22%
15	海思半导体	1,390	0.68%	32	敦泰電子	442	0.22%
16	Synaptics	1,220	0.60%	33	MegaChips	411	0.20%
17	Allegro MicroSystems	1,049	0.52%	34	其他厂商	20,371	10.00%



半导体-制造

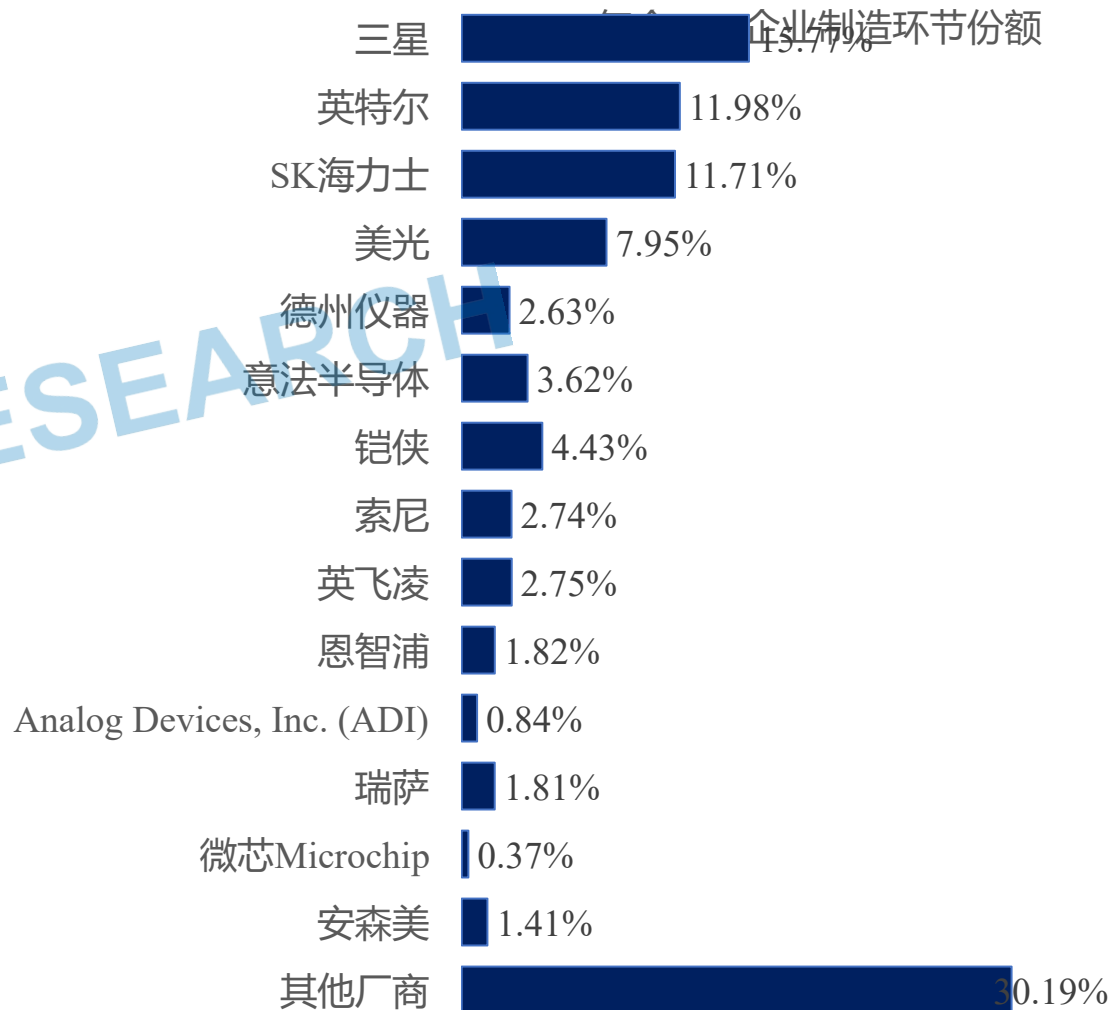
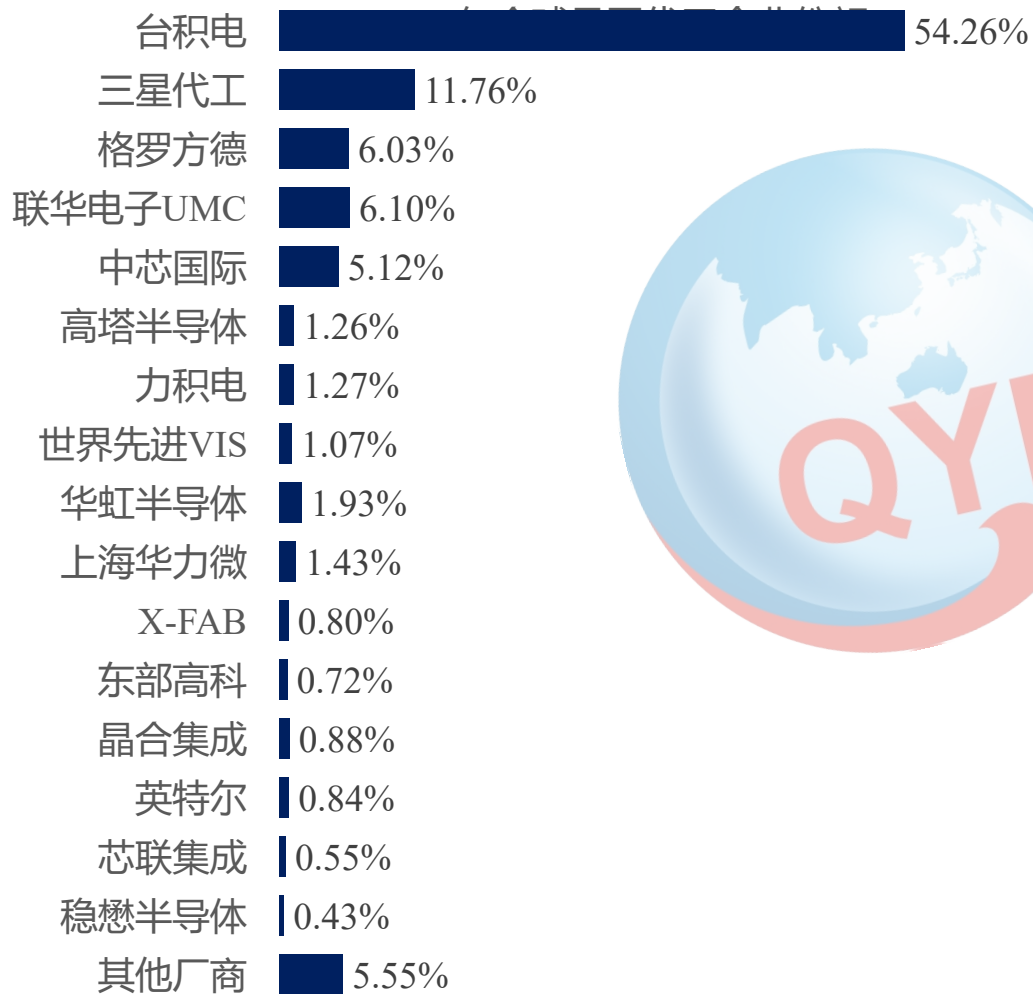
半导体制造环节企业主要有两大类：Foundry和IDM。根据QYResearch调研，2023年全球纯代工市场规模为1131亿美元、IDM制造环节规模为1386亿美元。预计2030年晶圆代工规模将达到2779亿美元。





半导体-制造企业份额

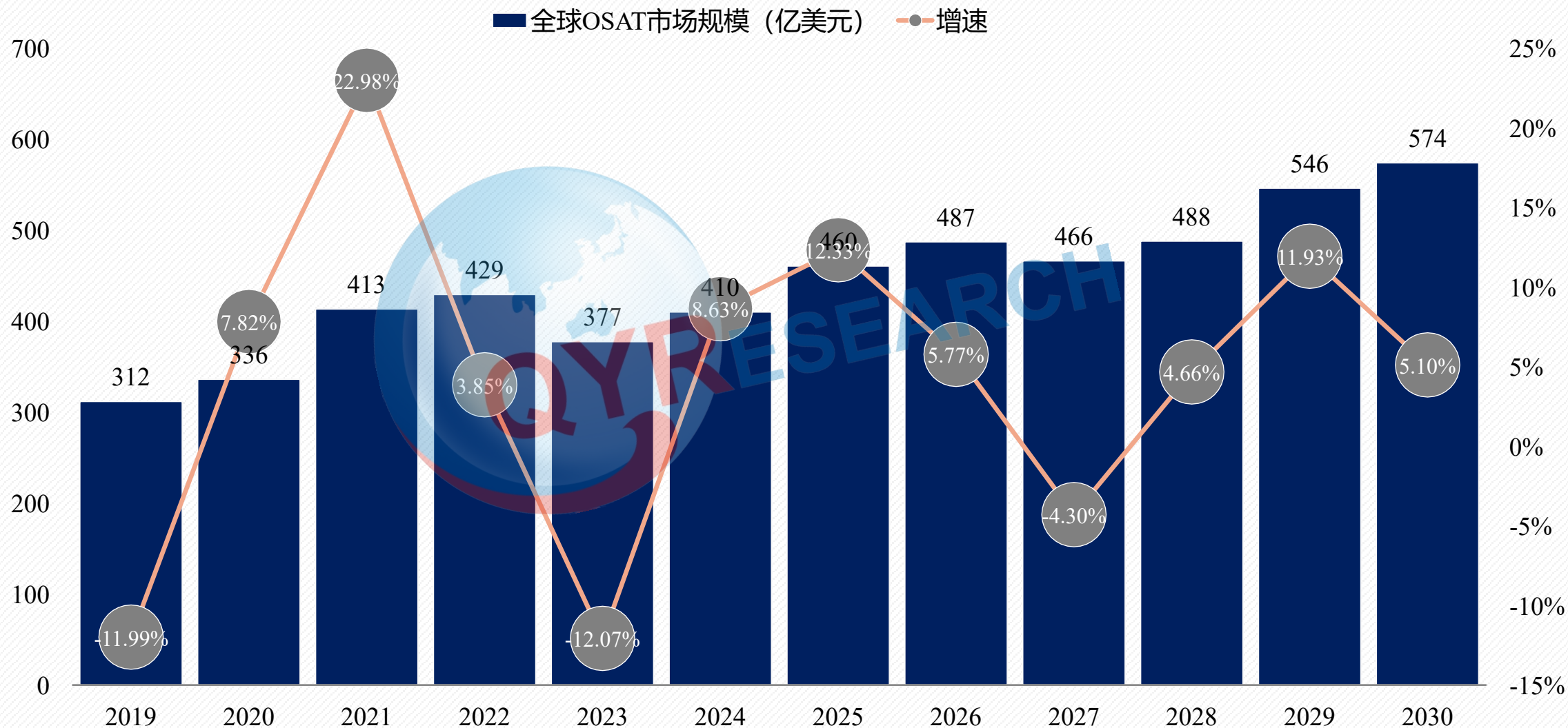
半导体制造环节企业主要有两大类：Foundry和IDM。其中Foundry最大厂商为台积电，2023年占全球54%；IDM最大企业主要分布在韩国、美国和欧洲。





半导体-OSAT

半导体封测环节企业主要有三大类：OSAT、IDM和Foundry。根据QYResearch调研，2023年全球OSAT市场规模为377亿美元，预计2030年将达到574亿美元。

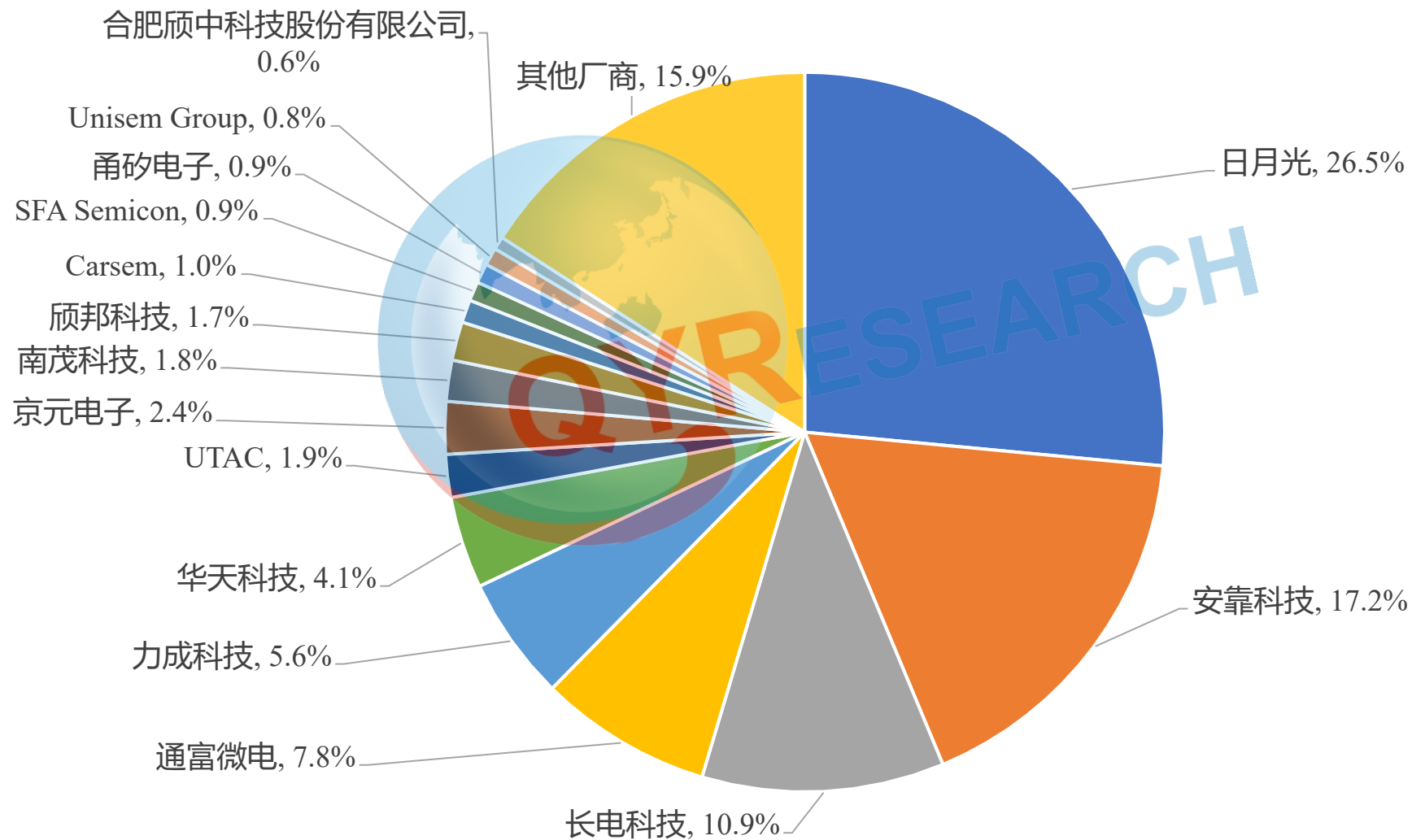




半导体-OSAT企业份额

根据QYResearch调研，2023年全球OSAT前15大厂商占有接近85%的市场份额，核心厂商主要分布在中国台湾、美国、中国大陆、东南亚等地区。

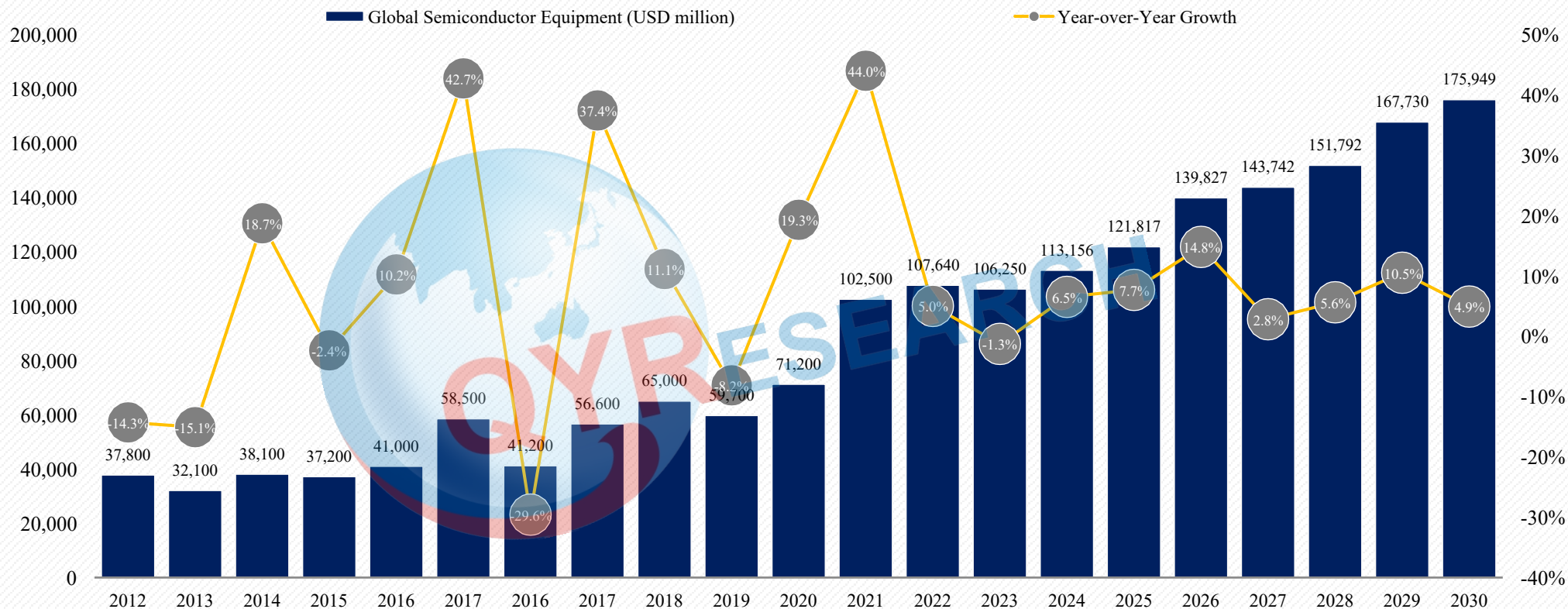
2023年全球OSAT企业市场份额





半导体设备

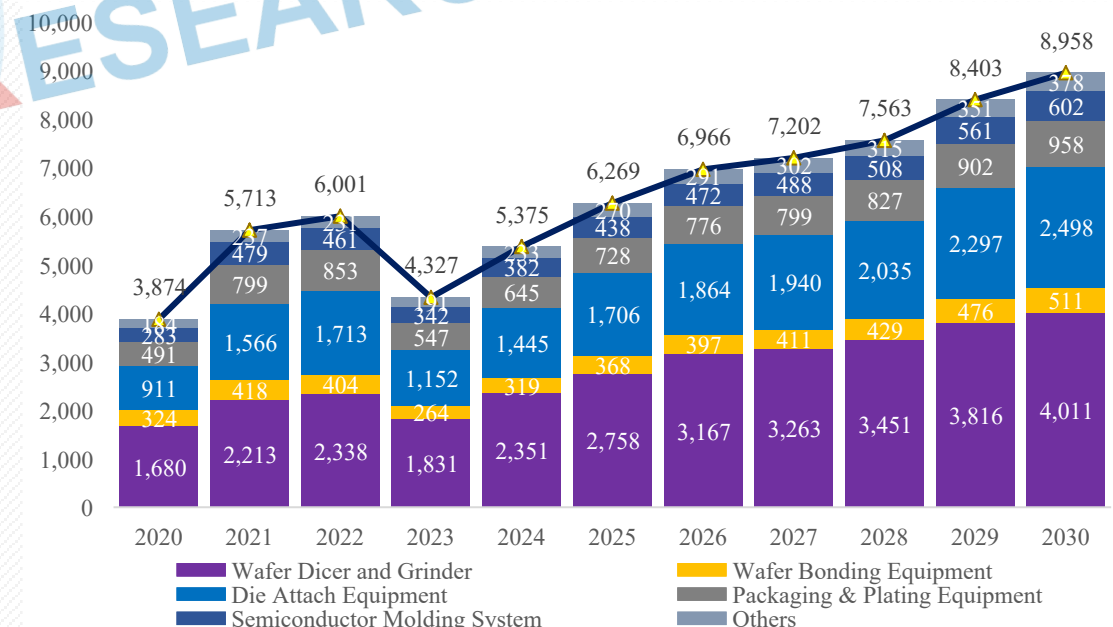
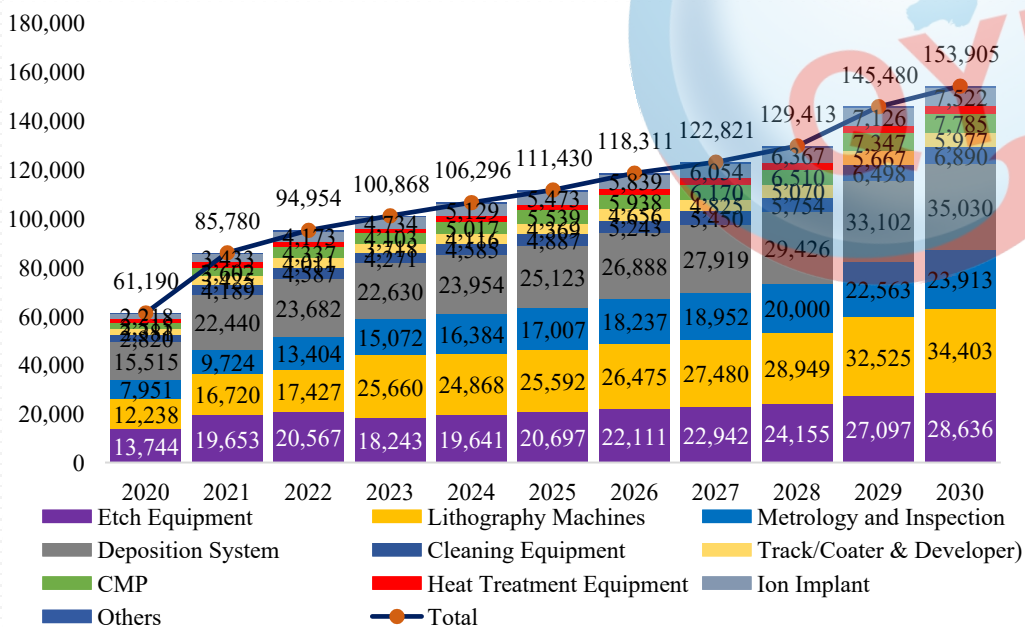
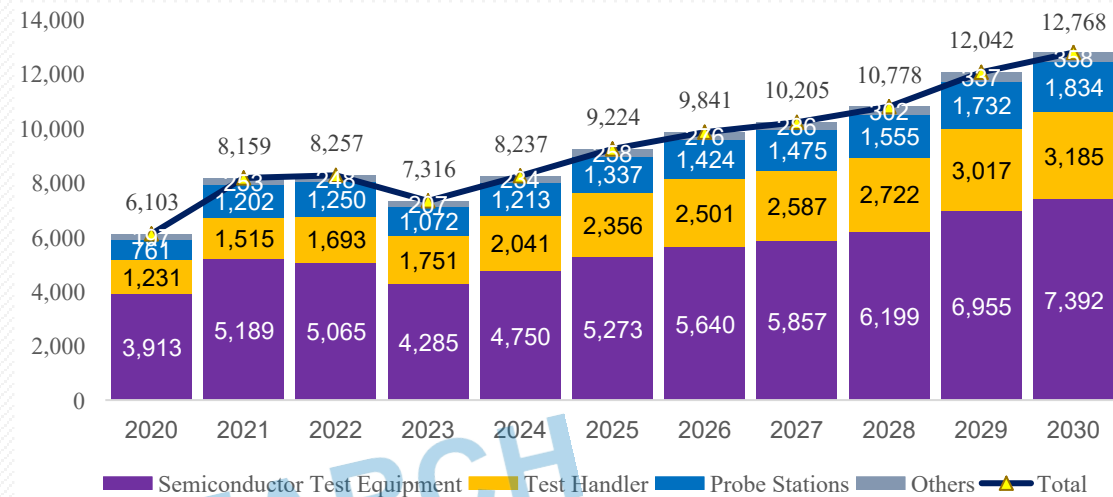
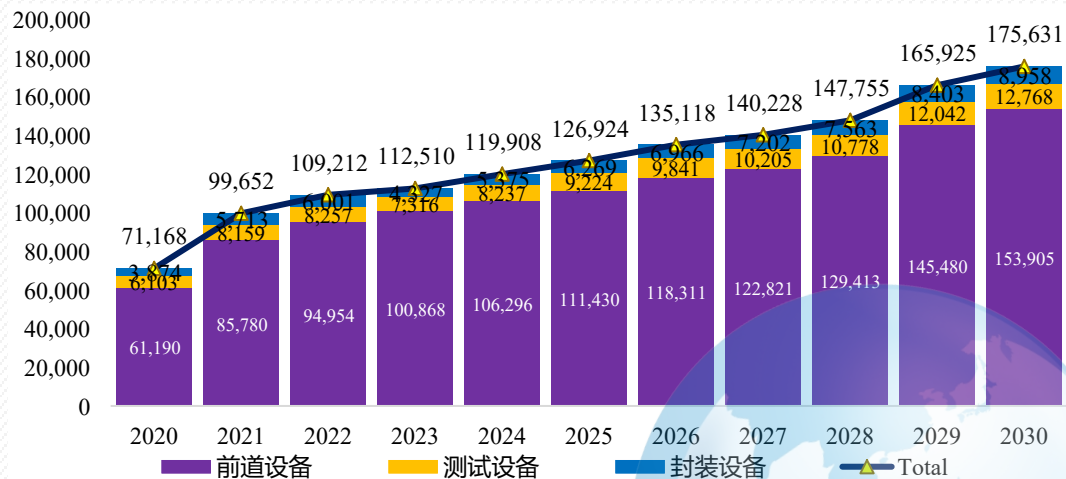
根据SEMI（国际半导体产业协会）数据，2024年全球半导体设备市场规模为1131亿美元，预计2030年将达到1759亿美元。此外，根据QYResearch调研，全球半导体二手/翻新设备市场规模也非常客观，2024年全球大约为37亿美元。





半导体设备

根据SEMI及QYResearch调研，全球半导体前道、后道设备及各细分规模





半导体设备-企业排名

根据QYResearch调研数据，2023年全球前45大半导体设备厂商占有大约97%的市场份额。

排名	企业	2023年半导体设备收入（百万美元）	2023份额	排名	企业	2023年半导体设备收入（百万美元）	2023份额
1	ASML	23,115	21.8%	24	NuFlare Technology, Inc.	544	0.51%
2	应用材料	19,698	18.5%	25	盛美上海	523	0.49%
3	东京电子	12,997	12.2%	26	Veeco	500	0.47%
4	泛林半导体	8,922	8.4%	27	Wonik IPS	375	0.35%
5	KLA Pro Systems	7,620	7.2%	28	拓荆科技	371	0.35%
6	SCREEN	2,965	2.8%	29	华海清科	321	0.30%
7	北方华创	2,458	2.3%	30	SUSS MicroTec Group	275	0.26%
8	爱德万	2,354	2.2%	31	ULVAC TECHNO, Ltd.	238	0.22%
9	ASM International	2,206	2.1%	32	芯源微	237	0.22%
10	Hitachi High-Tech	1,900	1.8%	33	Eugene Technology	188	0.18%
11	泰瑞达	1,819	1.7%	34	比思科集团	172	0.16%
12	Lasertec	1,516	1.4%	35	Jusung Engineering	168	0.16%
13	DISCO Corporation	1,441	1.4%	36	Oxford Instruments	159	0.15%
14	Canon U.S.A.	1,267	1.2%	37	中科飞测	123	0.12%
15	Nikon Precision Inc	1,248	1.2%	38	至纯科技	108	0.10%
16	细美事	1,210	1.1%	39	TES CO., LTD	77	0.05%
17	Ebara Technologies	1,028	1.0%	40	Samco Inc.	56	0.05%
18	Axcelis Technologies Inc	884	0.8%	41	精测电子	56	0.05%
19	中微公司	882	0.8%	42	Plasma-Therm	55	0.03%
20	Kokusai Electric	834	0.8%	43	弘塑科技	50	0.03%
21	屹唐半导体	792	0.7%	44	漢辰科技	30	0.02%
22	Onto Innovation	683	0.6%	45	天虹科技	28	0.01%
23	爱思强	575	0.5%	46	其他厂商	3,186	3.00%



半导体二手设备-企业排名

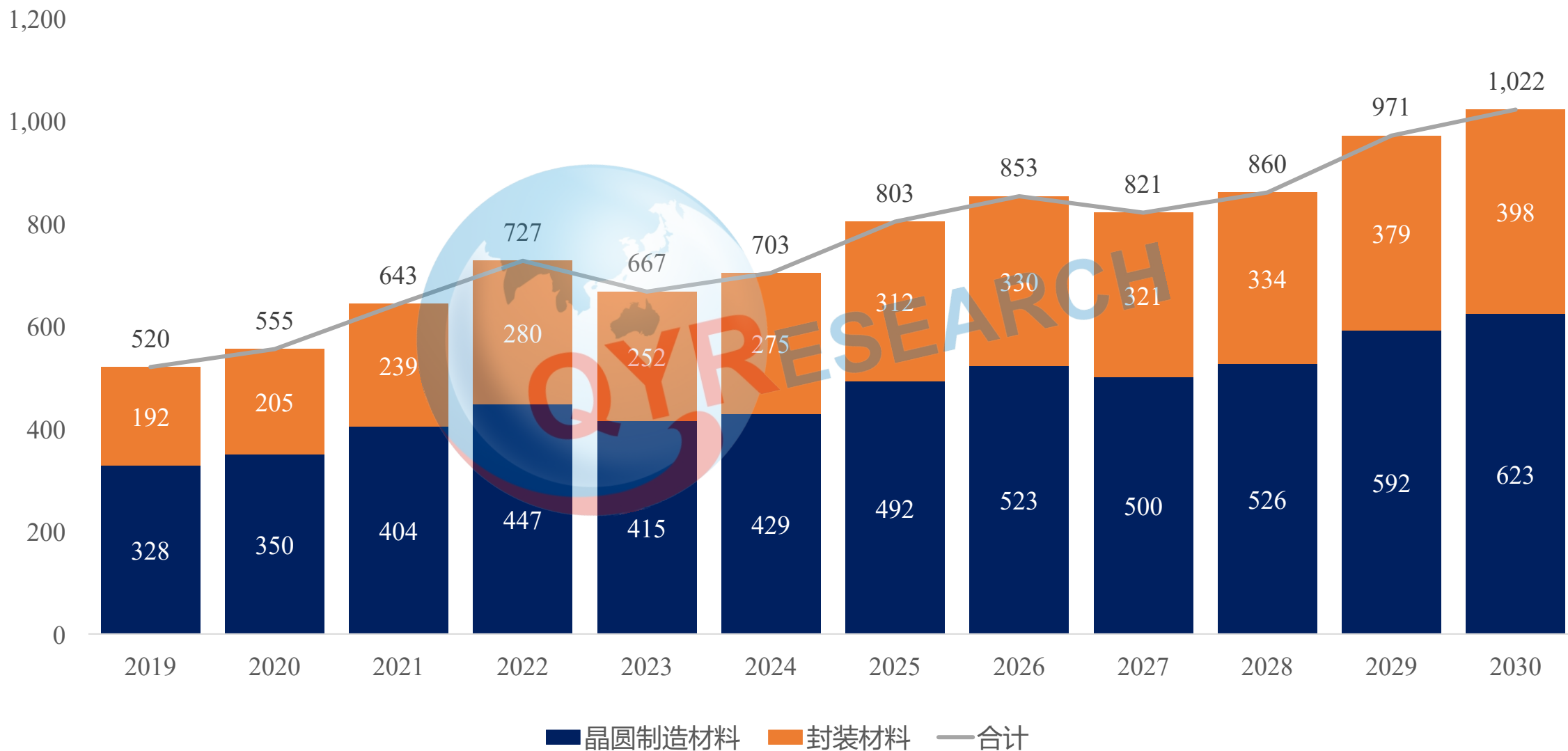
根据QYResearch调研数据，2023年全球前50大半导体二手/翻新设备厂商占有大约95%的市场份额。

排名	企业名称	2023二手设备收入（百万美元）	2023份额	排名	企业名称	2023二手设备收入（百万美元）	2023份额
1	Lam Research	897.56	25.12%	26	Canon U.S.A.	21.27	0.60%
2	Applied Materials, Inc. (AMAT)	458.80	12.84%	27	Moov Technologies, Inc.	20.27	0.57%
3	KLA Pro Systems	342.90	9.60%	28	合肥开悦半导体	19.72	0.55%
4	ASML	341.49	9.56%	29	嘉芯半导体	19.72	0.55%
5	CAE Online	129.15	3.61%	30	Maestech Co., Ltd	19.42	0.54%
6	SurplusGLOBAL	115.00	3.22%	31	争丰半导体	16.96	0.47%
7	Nikon	87.11	2.44%	32	上海微高精密	15.71	0.44%
8	吉姆西半导体	80.67	2.26%	33	寶虹科技	15.60	0.44%
9	Kokusai Electric	53.91	1.51%	34	E-Tech Solution Inc.	15.58	0.44%
10	Intel Resale Corporaton	52.67	1.47%	35	亦亨电子	15.49	0.43%
11	三井住友金融与租赁	43.83	1.23%	36	Entrepix, Inc	15.18	0.42%
12	ASM International	42.81	1.20%	37	AMTE (Advanced Materials Technology & Engineering)	14.14	0.40%
13	无锡卓海科技	33.10	0.93%	38	DISCO Corporation	14.04	0.39%
14	江苏大摩半导体	32.66	0.91%	39	ClassOne Equipment	13.33	0.37%
15	PJP TECH	31.98	0.90%	40	CIS Corporation	13.24	0.37%
16	上海图双精密	31.75	0.89%	41	Meidensha Corporation	12.24	0.34%
17	Ichor Systems	30.32	0.85%	42	Semicat, Inc	11.87	0.33%
18	TEL (Tokyo Electron Ltd.)	29.41	0.82%	43	EquipNet, Inc	11.52	0.32%
19	Hightec Systems	29.15	0.82%	44	上海广奕电子	11.38	0.32%
20	盛吉盛	27.75	0.78%	45	靖洋集團	10.78	0.30%
21	Russell Co., Ltd	27.21	0.76%	46	Intertec Sales Corp.	10.41	0.29%
22	Axcelis Technologies Inc	25.97	0.73%	47	Axus Technology	10.32	0.29%
23	Ebara Technologies, Inc. (ETI)	25.91	0.73%	48	AG Semiconductor Services (AGSS)	9.86	0.28%
24	江苏晋誉达	25.26	0.71%	49	ULVAC TECHNO, Ltd.	9.54	0.27%
25	Macquarie Semiconductor and Technology	23.06	0.65%	50	SCREEN SPE Germany GmbH	9.12	0.26%



半导体材料

根据SEMI数据，2023年全球半导体材料市场规模为667亿美元，预计2030年将达到1022亿美元。其中晶圆制造材料占比62%、封装材料占比38%。

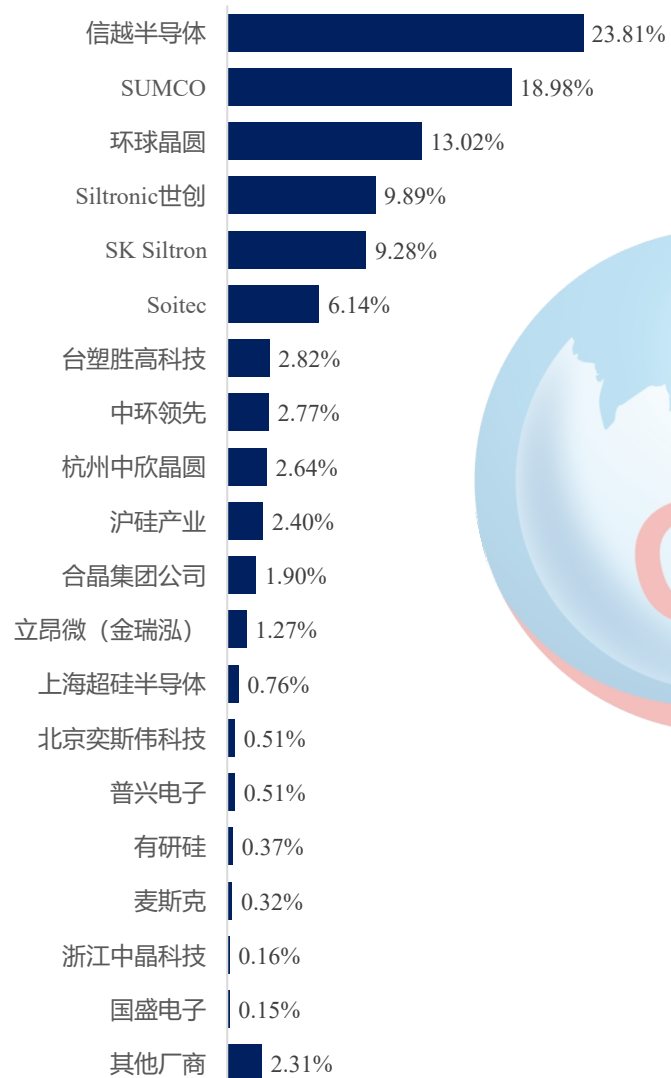




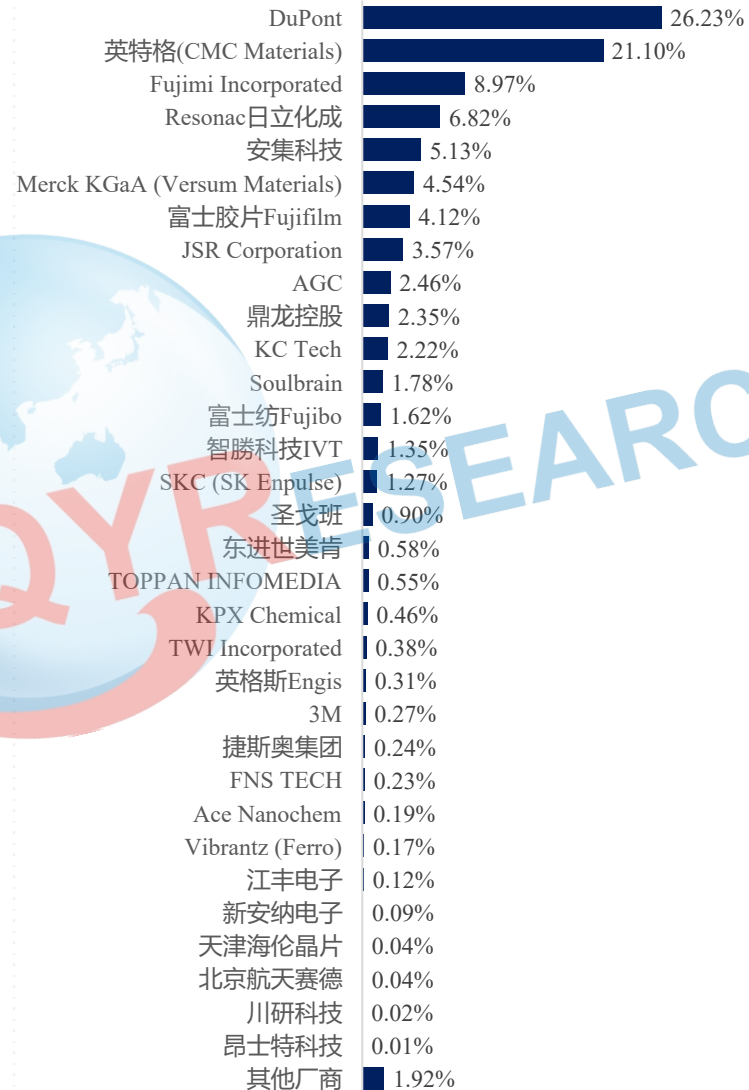
半导体材料-细分

如下是三个代表性的半导体材料，根据QYResearch调研，全球范围内企业排名如下：

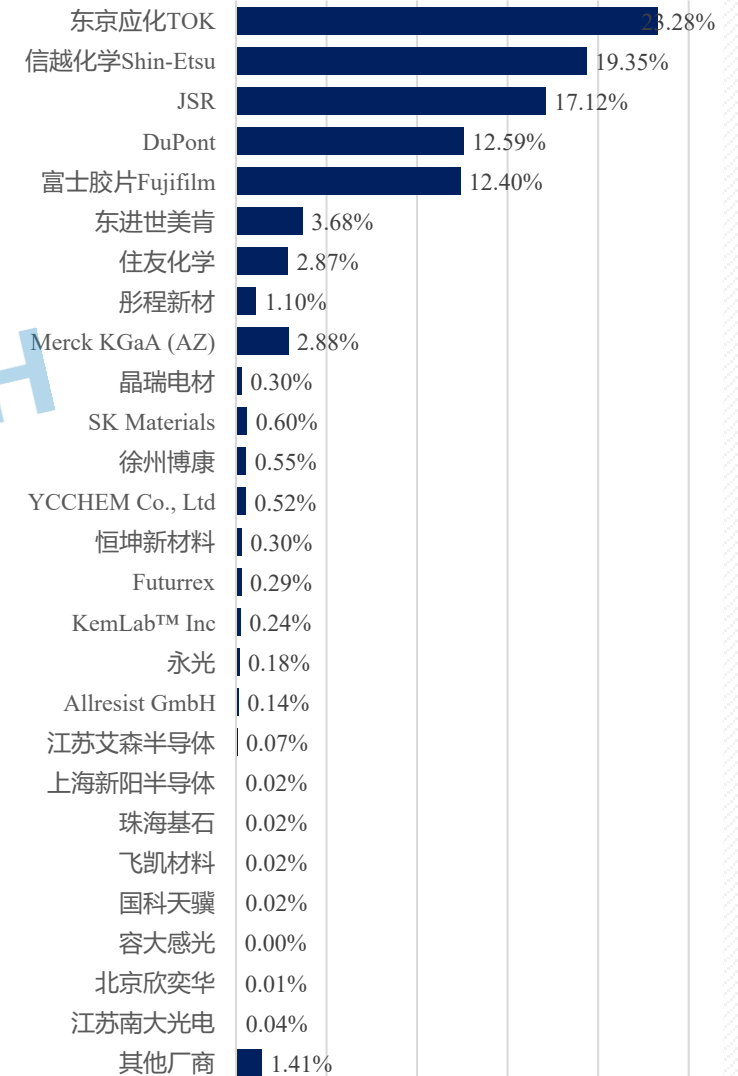
2023全球半导体硅片市场排名



2023全球CMP抛光液与抛光垫排名



2023全球半导体光刻胶企业排名





半导体设备零部件

根据QYResearch数据，2023年全球半导体设备零部件市场规模为286亿美元，预计2030年将达到472亿美元。核心厂商主要分布在美国、欧洲和日本。全球前60大厂商占有大约80%的市场份额。

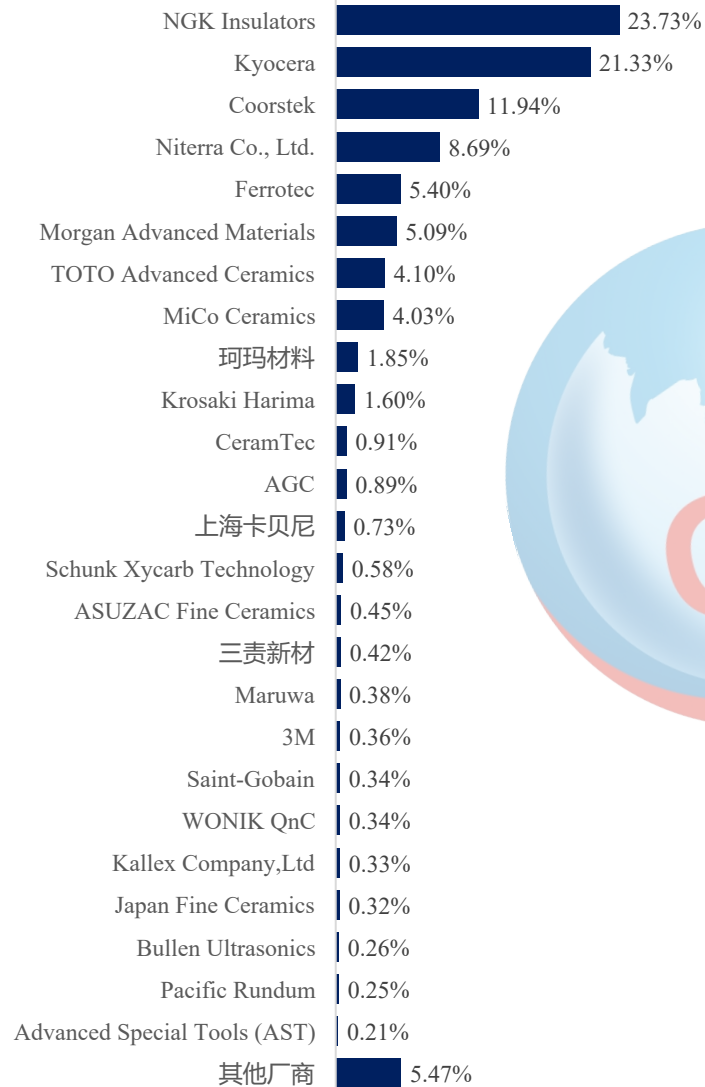
排名	企业名称	2023零部件收入（百万美元）	2023份额	排名	企业名称	2023零部件收入（百万美元）	2023份额
1	ZEISS	2,728	9.52%	31	GST (Global Standard Technology)	169.33	0.59%
2	Entegris	1,642	5.73%	32	Foxsemicon Integrated Technology	160.62	0.56%
3	MKS Instruments	1,481	5.17%	33	CSK	159.32	0.56%
4	Atlas Copco (Leybold, and Edwards Vacuum)	1,471	5.13%	34	Pfeiffer Vacuum GmbH	157.30	0.55%
5	Trumpf	1,149	4.01%	35	DAIHEN Corporation	151.04	0.53%
6	Ultra Clean Holdings Inc. (UCT)	1,016	3.55%	36	Watlow (CRC)	150.98	0.53%
7	NGK Insulators	905	3.16%	37	Shin-Etsu Polymer	149.47	0.52%
8	VAT Vakuumventile	826	2.88%	38	TOTO Advanced Ceramics	144.97	0.51%
9	ASML	775	2.71%	39	Advanced Thermal Sciences Corporation (ATS)	143.00	0.50%
10	Ichor Systems	767	2.67%	40	Morgan Advanced Materials	121.13	0.42%
11	Applied Materials, Inc. (AMAT)	735	2.57%	41	SMC Corporation	120.30	0.42%
12	Advanced Energy	707	2.47%	42	Sevenstar	119.88	0.42%
13	Brooks Automation	593	2.07%	43	Miraial Co., Ltd.	118.73	0.41%
14	Kyocera	558	1.95%	44	Unisem	117.17	0.41%
15	HORIBA	541	1.89%	45	Shinwa Controls	116.04	0.40%
16	Ebara Corporation	532	1.86%	46	Swagelok	111.99	0.39%
17	RORZE Corporation	528	1.84%	47	MiCo Ceramics Co., Ltd.	110.40	0.39%
18	Lam Research	521	1.82%	48	Yaskawa	107.84	0.38%
19	Ferrotec	481	1.68%	49	Schunk Xycarb Technology	107.36	0.37%
20	Pall	420	1.46%	50	Kuze	97.90	0.34%
21	Fujikin	355	1.24%	51	Tosoh Quartz Corporation	91.70	0.32%
22	Camfil	293	1.02%	52	LOT Vacuum	88.29	0.31%
23	Kawasaki Robotics	269	0.94%	53	Dockweiler	87.43	0.31%
24	Parker	247	0.86%	54	Durex Industries	83.44	0.29%
25	Coorstek	228	0.80%	55	KITZ SCT	82.74	0.29%
26	Niterra Co., Ltd.	228	0.80%	56	Kashiyama Industries	76.94	0.27%
27	CKD	215	0.75%	57	XP Power (Comdel)	65.93	0.23%
28	Hirata Corporation	209	0.73%	58	Nippon Seisen	62.69	0.22%
29	JEL Corporation	193	0.67%	59	GEMÜ	53.88	0.19%
30	SHINKO	180	0.63%	60	HandyTube	51.88	0.18%



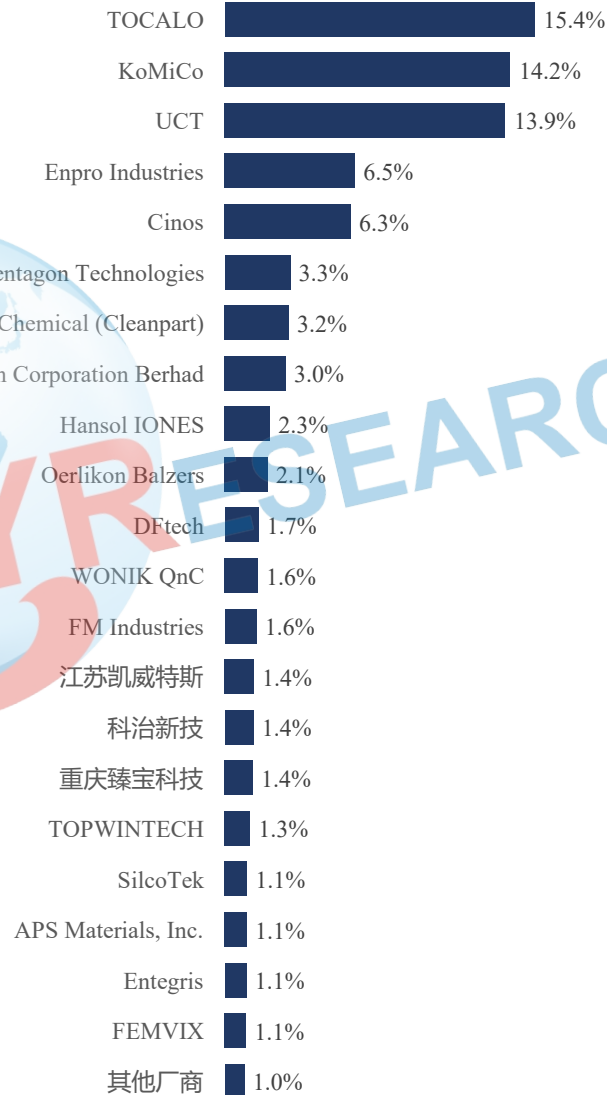
半导体零部件/服务-细分

如下是三个代表性的半导体零部件/服务，根据QYResearch调研，全球范围内企业排名如下：

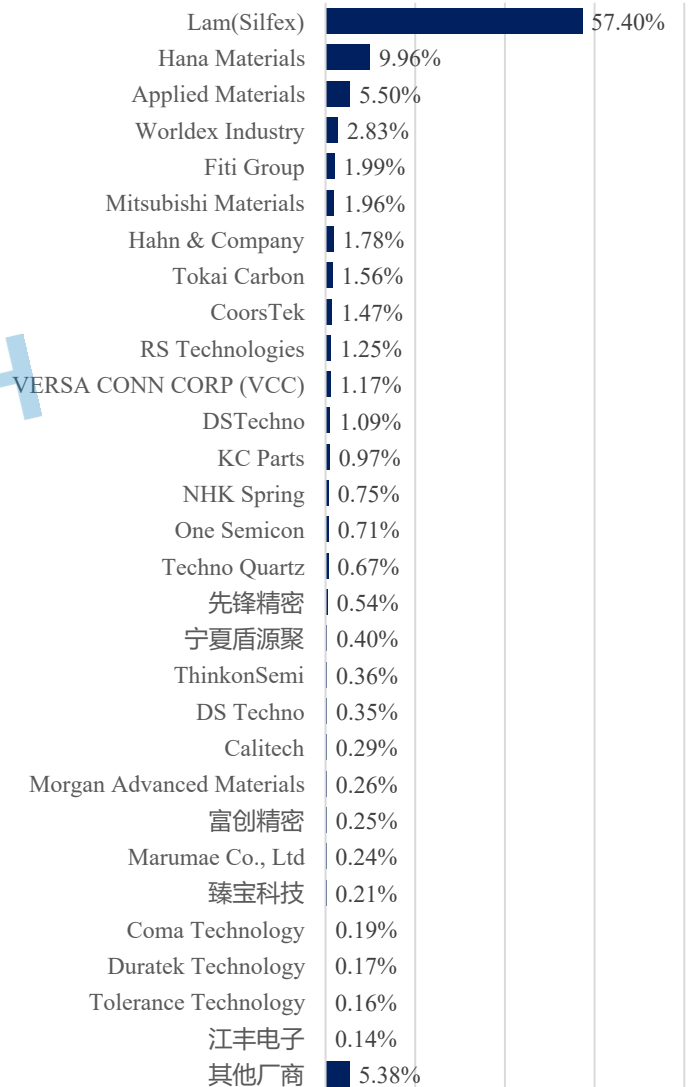
2023全球半导体设备用陶瓷排名



2023年全球半导体熔射服务企业排名



2023全球半导体Showhead排名





QYResearch报告介绍

QYResearch提供半导体产业链各细分产品调研报告，包括常规报告和定制调研，涵盖半导体产业链及下游各个细分领域产品。

报告类型	介绍
常规报告	涉及到全球总体规模、增长空间、核心地区产销量规模、企业销量/收入价格份额/排名、产品趋势、技术趋势、应用趋势、SWOT分析、成本分析等。在全球和中国行业咨询/调研领域，占据重要地位，客户遍布全球。
定制调研	如供应链关系、客户信息、成本分析、可行性调研、IPO、专精特新等。

半导体板块	报告覆盖（如下我们代表性的调研领域）
半导体材料	包括制造材料、封装材料等，半导体硅片、光刻胶、CMP抛光材料、溅射靶材、电子特气、高纯化学试剂、IC载板/ABF/MIS、引线框架、陶瓷基板/封装等。
设备及零部件	半导体新设备、翻新/二手设备、辅助设备、设备零部件/耗材等，零部件如金属件、陶瓷件、塑料件、泵阀、Robot、EFEM、ESC、MFC、射频电源、Chiller、UHP、AMHS等。
芯片/器件	如各类逻辑/模拟芯片、存储IC、传感器、分立器件/模块、硅基、二代/三代半导体、IGBT、MOSFET、SIC功率器件、光电器件、电源管理芯片、功率半导体、PCB等。
器件制造/封装/及其他	晶圆代工、特色工艺、氮化镓/碳化硅代工、逻辑、CIS、先进封装、先进/尖端制程、成熟制程、外延、Coating/Cleaning、洁净室/二次配工程。



QYResearch引用案例

中国企业招股书-1



深圳中科飞测科技股份有限公司

招股说明书

序号	设备类型	销售额 (亿美元)	占全球总销售额比例
10	晶圆介质薄膜量测设备	2.3	3.0%
11	X 光量测设备	1.7	2.2%
12	掩膜版关键尺寸量测设备	1.0	1.3%
13	三维形貌量测设备	0.7	0.9%
14	晶圆金属薄膜量测设备	0.4	0.5%
15	其他	2.9	3.9%
合计		76.5	100.0%

数据来源: VLSI Research、QY Research

https://pdf.dfcfw.com/pdf/H2_AN202305151586646384_1.pdf?1684177481000.pdf



胜科纳米(苏州)股份有限公司

招股意向书



数据来源: QY Research



股票代码
301626

苏州天脉导热科技股份有限公司招股说明书

进入富士康、中芯电子、海康威视、启基科技、宁德时代等知名客户供应链，抢占全球高端市场份额。

2021 年，公司导热界面材料实现收入为 15,215.66 万元，根据 QYResearch 及观研报告网的预测数据，2021 年，全球及中国导热界面材料市场规模分别约为 57.96 亿元和 13.50 亿元，据此估算，公司导热界面材料全球和国内市场份



根据 QY Research 数据，半导体专用温控设备国内市场集中度较高，年至 2022 年市占率前六厂商合计市占率水平维持在 90%左右，其中公司：一家国内厂商，公司产品已经打破国外厂商垄断地位。

根据 QY Research 数据，2018 年至 2022 年全球及中国半导体专用温控设备市场空间情况如下：



<https://www.baecld.com.cn/>



据 SEMI (国际半导体产业协会)、ICMtia (集成电路材料产业技术创新联盟) 统计数据 (将统计的美元数据乘以各年平均汇率折算) 显示，最近几年，全球半导体引线框架市场规模均在 210 亿元以上 (将统计的美元数据按照各年平均汇率折算)，2021 年全球半导体引线框架市场规模约 246.45 亿元。根据 QYResearch 统计数据，2022 年全球引线框架市场规模约为 269 亿元，2023 年全球半导体引线框架市场规模约为 279.20 亿元 (按增长率 3.8%测算)，预计 2029 年将达到 352 亿元，2023-2029 期间年复合增长率 (CAGR) 为 3.8%。



钧微电子科技有限公司

招股说明书



数据来源: QYResearch

苏州楷威特半导体股份有限公司

招股意向书

① 市场规模

A、PWM 控制 IC 的市场规模

根据 QYResearch 测算，2022 年全球 PWM 控制 IC 的市场规模为 50.74 亿美元，预计 2028 年将达到 67.70 亿美元，年增长率为 4.92%。2022 年中国 PWM 控制 IC 的市场规模约为 19.75 亿美元，预计 2028 年将达到 30.12 亿美元，年增长率 7.28%；其中中国高可靠领域 PWM 控制 IC 市场规模为 5.00 亿美元，预计 2028 年将达到 7.61 亿美元，年增长率 7.26%。



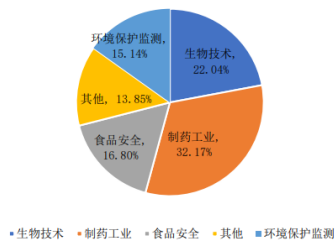
QYResearch引用案例

中国企业招股书-2

苏州赛分科技股份有限公司 首次公开发行股票并在科创板上市招股说明书

根据 QYResearch 数据,在全球范围内,色谱柱市场主要受生物技术与制药工业的推动,该领域消费量占色谱柱整体市场份额的比例合计达到 54.21%。其次为食品安全与环境保护监测领域,分别占色谱柱整体市场份额的 16.80%与 15.14%。

全球色谱柱应用领域消费量市场份额占比情况



数据来源: QYResearch

热管理材料是帮助产品提高散热效果的功能性材料,用于提高热传导效率,使得热量均匀分散,是消费电子、汽车电子、通信设备等领域不可或缺的材料。随着下游行业的不断发展,全球热管理行业保持持续发展态势,根据 QY Research 统计数据显示,到 2020 年,全球热管理材料市场将达到 108.90 亿美元,预计到 2027 年全球热管理材料市场将达到 139.80 亿美元,年复合增长率达 3.63%。

1-1-103

广东思泉新材料股份有限公司 招股说明书(申报稿)

近年来,随着我国导热材料行业技术不断进步,在下游应用领域快速发展的推动下,中国导热材料市场规模不断扩大。根据新材料在线预测,2020 年,中国导热材料市场需求规模有望达到 155.3 亿元,预计 2021-2025 年复合增长率 9.69%。

UGREEN 绿联

深圳市绿联科技股份有限公司

招股说明书

(3) 充电类——手机数据线

同行业公司	2021 年度手机数据线市场占有率情况	
	中国市场	全球市场
Belkin	1.12%	0.41%
安克 (Anker)	0.15%	0.60%
公牛 (Bull)	0.94%	0.20%
海能实业 (Ce-link)	1.32%	0.34%
品胜 (Pisen)	2.18%	0.54%
发行人	1.59%	0.58%

注:数据来源于 QYResearch

² 数据来源: QYRESEARCH,《Global Heating Element Market Research Report 2022》,图中带*年份为预测数据,下文我国电热元件市场规模数据亦来源于此报告

1-1-96

杭州热威电热科技股份有限公司

招股意向书



深圳安培龙科技股份有限公司

招股说明书

在过去几年,热敏电阻的应用范围不断扩大,全球市场规模保持稳定增长。根据 QYResearch 的统计,2018 年热敏电阻的全球销售额为 9.05 亿美元,同比增长约 6%,未来几年,仍将持续增长,预计 2025 年全球销售额为 10.40 亿美元。

从下游市场来看,消费类产品为热敏电阻的主要销售市场,占比为 53.23%,其次为工业设备,占比为 11.12%。从区域来看,亚太地区是最大的消费市场,就数量而言,占据了约 88% 的市场份额,预计 2018-2025 年的复合增长率为 6.12%,保持相对较快的增长速度。



全球前驱体市场规模(单位:亿美元)



资料来源:富士经济

中国市场是全球半导体前驱体的主要市场之一。根据 QYResearch 数据,2021 年中国半导体前驱体市场规模达到 5.9 亿美元,预计 2028 年将达到 11.56 亿美元,年复合增长率预计为 10%。



QYResearch引用案例

国外企业招股书-1



Prospectus

dated May 7, 2021

hGears' core sales region, Europe, is one of the fastest growing and largest regions for precision components with a market value of EUR 1.1 billion corresponding to a share of 27.3% of the total global precision components market in the financial year ended December 31, 2020 (source: Arizton 2020; IHS 2020; Markets and Markets 2020; QYResearch 2020). European sales volumes of electric and hybrid vehicles are expected to grow strongly at a compound annual growth rate ("CAGR") of ca. 43% p.a. between 2018 and 2025 (source: IHS 2021). E-axes of electric and hybrid vehicles include high precision components, thereby increasing demand. The market for e-bikes with mid-

<https://ir.hgears.com/wp-content/uploads/hGears-Securities-Prospectus-7-May-2021.pdf>



Cal-Comp Technology (Philippines), Inc.
(incorporated in the Republic of the Philippines)

INDUSTRY

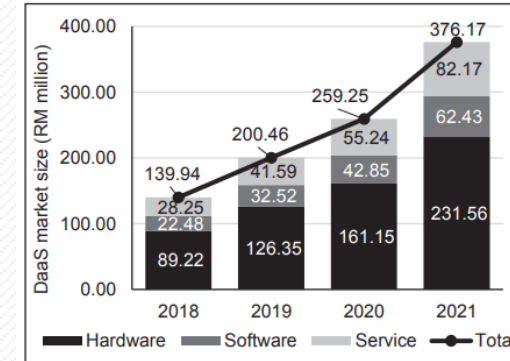
The information set out in this section "Industry" has been extracted from the Global Electronics Manufacturing Services (EMS) Market Size, Status and Forecast 2023 published by QY Research dated May 2018.

Electronics manufacturing services is a term used for companies that design, manufacture, test, distribute, and provide return/repair services for electronic components and assemblies for original equipment manufacturers. The concept is also referred to as electronics contract manufacturing ("ECM").



<https://www.sns.com.my/wp-content/pdf/file/SNS-Prospectus.pdf>

DaaS market size, 2018 – 2021



Sources: Malaysia DaaS Market Size by QY Research Inc, SMITH ZANDER analysis



AIRTHINGS ASA

(A public limited liability company incorporated under the laws of Norway)

Listing of the Company's Shares on Oslo Børs

The Company's current operations are primarily focused in the North-American market has an important foothold in numerous European countries, including the Nordics, Germany and the UK. Essentially every building and household in North-America and Europe is total addressable market is considered large. Currently, Airthings considers the North-markets as its main markets, but the Company's strategic ambition is to also grow in other

¹ European Commission CORDIS EU research results, International Energy Agency (IEA)

² QYResearch "Impact of COVID-19 Outbreak on Random Gas Sensors Gas sensors, of global market (2020), page 10 cont.



QYResearch引用案例

国外企业招股书-2

bioretec

Bioretec Ltd

Listing on Nasdaq First North Growth Market Finland
Share Issue of approximately EUR 25 million
Subscription Price of EUR 3.90 per Offer Share

¹³ Source: For spinal cage: Global Market Analysis and Forecast Model (COVID-19 market impact), Allied Market Research, QYR, for other products: GlobalDataReport 2020, Trauma Fixation (Orthopedic Devices).

https://danskebank.fi/PDF/IPO/Bioretec/Bioretec_Ltd-Offering_Circular.pdf

FORM S-3
REGISTRATION STATEMENT
UNDER
THE SECURITIES ACT OF 1933

biote Corp.

(Exact name of Registrant as specified in its charter)

Beyond the breadth and depth of our commercial and operational platform, the Biote name has achieved strong brand recognition among practitioners and patients in the communities we serve, as illustrated by QY Research's market research publication entitled "South & North America Hormone Replacement Therapy Market Insights and Forecast to 2026." Practitioners undertaking the Biote Method can be confident that

<https://ir.biote.com/static-files/c8484bc9-a3b6-4ffe-98f8-764a9b2972b2>

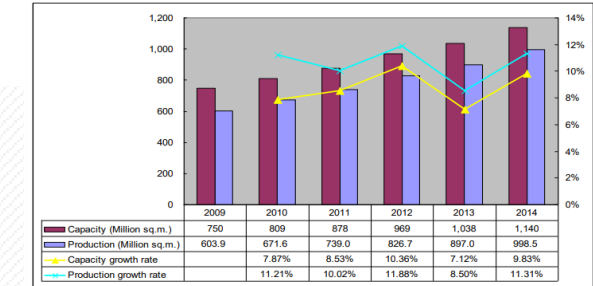


SHARDA CROP CHEM LIMITED

https://www.sebi.gov.in/sebi_data/attachdocs/1409562203410.pdf

RED HERRING PROSPECTUS
Dated August 27, 2014
Please read Section 32 of the Companies Act, 2013
Book Built Issue

Figure 2009-2014 Global Major Manufactures Heavy Duty Conveyor Belts Capacity Production and Growth Rate



Source: QY Research Heavy Duty Conveyor Belts Industry Report

REGISTRATION STATEMENT
UNDER
THE SECURITIES ACT OF 1933

CAMBIUM NETWORKS CORPORATION

(Exact name of Registrant as specified in its charter)

Market opportunity

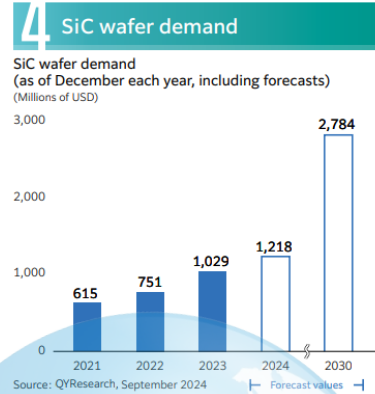
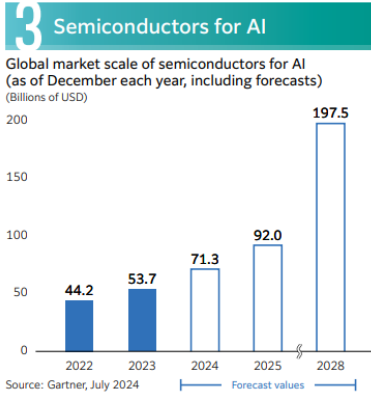
The majority of our revenues today come from PTP and PMP solutions. According to Sky Light Research, the PTP Mic expected to grow from \$3.1 billion in 2017 to \$4.2 billion through 2021. According to QYResearch, the PMP market is expected to grow from \$0.5 billion in 2017 to \$0.9 billion in 2025. We entered the Wi-Fi market in 2016 and it has become a meaningful part of our business.

<https://investors.cambiumnetworks.com/static-files/423c3b11-ce30-4c1a-a2d9-c56a588f005a>



QYResearch引用案例

国外企业引用情况，大量日本、韩国、欧美客户及机构，引用QYResearch报告数据



Taiwan to require the new cars to be equipped with TPMS. In the future, Japan, India, and other countries will also begin to regulate the installation of TPMS on new cars, which will drive market opportunities. According to QY Research, the global market for tire pressure monitor systems is expected to reach US\$3,630.65 million by 2024.

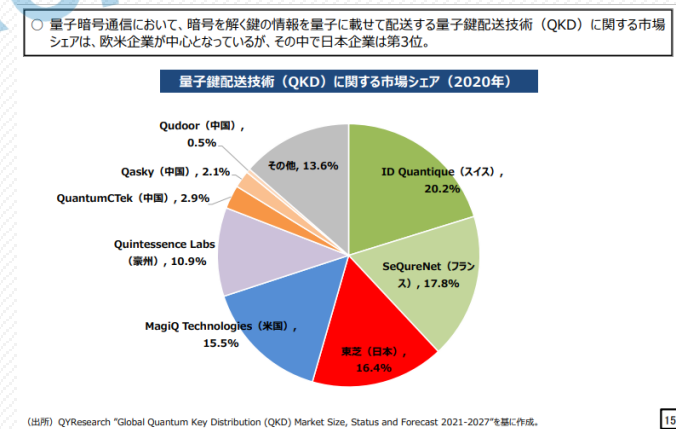
<https://www.ircms.jp/irexport/fujimiinc/file/a79408118033399.pdf>

https://www.sysgration.com/uploads/financial_report/2022/2022_Annual_Report_EN.pdf



The diffusion of next-generation vehicles is a highly feasible event in both scenarios, with or without the introduction of policies, but in the 1.5°C scenario, the diffusion will be rapid due to policy support. The Company believes that it has the technological superiority and technological development capability to respond to this rapid spread, and that it can promptly respond to the rapid market expansion and grow the Company's business.

- *1 Cellulose Nano Fiber
- *2 QY Research (Japan) "Supercapacitor Global Market Share and Ranking, Overall Sales and Demand Forecast 2024-2030" (report dated January 1, 2024)
- *3 Market Research Community (U.K.) "Reinforced Plastics Market Size, Trends, Analysis, and Outlook to 2030" (report dated September 30, 2023)
- *4 Research Conducted on the Cellulose Nanofiber Global Market (2023) / News and Topics / Yano Research Institute Ltd. (yanoresearch.com)



https://www.nipponpapergroup.com/english/csr/npg_esgdb2024_e_ALL.pdf

https://www.cas.go.jp/jp/seisaku/atarashii_sihonsyugi/kaigi/dai4/shiryoku1r.pdf



QYResearch引用案例

国外企业引用情况

Qualcomm

20+ Years in mobile location tech² ~10B Devices shipped with our location capabilities

1. QYResearch, Ranking of Global Top GNSS Chip Manufacturers by Revenue, Apr. '20
2. Internal data

https://www.qualcomm.com/content/dam/qcomm-martech/dm-assets/documents/5g_positioning_for_the_connected_intelligent_edge.pdf

inTEST

Large and Growing Global In-Circuit Tester Market

Estimated SAM ~\$200 million*

Flying probe and integrated circuit
Estimated mid-single digit CAGR

Positive Market Trends

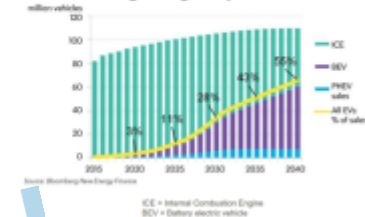
Strong growth in automotive electronics, consumer electronics and medical equipment

Primary markets for in-circuit testers:
U.S., Japan and China

Significant growth potential in Europe
due to the major automotive manufacturers
in the region

Acculogic has a large growth opportunity in the EV battery testing market, which according to Bloomberg, is expected to grow 40x by 2030

Annual global light duty vehicle sales



*Market data based on Future Market Insights 2021 report, QY Research 2021 report and Company estimates

inTEST

<https://ir.intest.com/static-files/764f3f61-551b-4c10-bc3f-00560c8d0a69>



Thin Film Lithium Niobate

- TFLN is rapidly emerging as the new darling child of the telecom and datacom industries
- Modulators built using TFLN consume very little power, are capable of operating with extremely high bandwidth, and hold the promise of miniaturization
- TFLN is in limited supply, coming exclusively from China
- TFLN is already in high demand; a processed six-inch TFLN wafer can potentially yield over \$3 million in sellable inventory

TFLN Modulator Market¹

\$185M

Market Size in 2022

41%

CAGR 2023- 2029

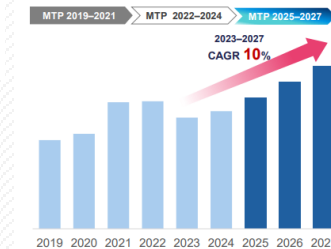
\$2B

Market Size in 2029

¹ QY Research, Sept. 2022



Total demand forecast



*Yamaha Motor estimates based on data/materials from Fuji Keizai and QY Research

https://assets.ctfassets.net/i1dyhzybi8ad/5ZQB8nfOQW7FtofotV8qVG/3621eb1874b82ecc4e2aa92d34bd6d4f/QCi_Investor_Presentation_November_2024.pdf

https://global.yamaha-motor.com/ir/library/report/pdf/2025/robot_en_01.pdf



QYResearch引用案例

国外企业引用情况



FY 2023 annual sales of world's MIM market:
About 4 billion dollars (about 590 billion yen)

CAGR (2018-2029): **10.7%**

Source : Secondary Sources, Expert Interviews and QYResearch, 2023

Growing demand for molded parts in the medical and defense industry that require high precision

<https://www.npr-riken.co.jp/en/ir/plan/pdf/plan.pdf>



Key Facts at a Glance

Park Systems achieved a compound average growth rate (CAGR) of 30% between 2015 and 2022, securing its position as the global leader in AFM, according to the Global Atomic-Force Microscopy, Market Report 2023 released by QYResearch*. The company currently has a sales network spanning over 30 countries with 500+ employees, with more than 37% of them engaged in R&D.

Revenue compounded growth
30%
FY2015 - FY2022

R&D investment
37%
Manpower of headcount

AFM market share*
#1
2022 Global AFM market leader

Market capitalization
>1.3 trillion
Currency in KRW (July 19, 2023)

Global network
63 sites
14 Direct offices

Recognition
Forbes Asia's 200
Named to Forbes Asia's 200 listing in 2020/2023



国内メーカーの課題

技術面

【分析】

- TEM 像のコントラストは独特のものであり、TEM 像を正確に解釈するにはそのコントラストの発生原理を理解することが重要
- 高エネルギーの電子線を使用するため、試料が破壊される場合がある。特に高分子分析では、一般的に、電子線の照射により、①材料内に生じた活性ラジカルによる結合の切断と再結合(非弾性散乱によるイオン化)、②材料内の原子との衝突により原子がはじき出されてしまうことによる損傷、③フォノンによる温度上昇、④欠陥の二次的拡散、が起こるとされ、試料自体の導電性や試料の厚みや染色の有無など、様々な試料作製条件なども考慮する必要がある

【前処理】

- 電子線を透過できるだけの超薄切片を作成することが極めて重要な要素だが、一部の試料において薄片化が困難な場合がある
- 試料加工および観察により、試料が変質・変形することがある

経済面

- 高コストであり、高い初期投資が市場の障壁となる
- 透過電子顕微鏡の原価は、輸入関税等の政府による輸出入規制によって上昇傾向

出典：QYResearch「透過型電子顕微鏡（TEM）の世界市場調査レポート:規模、現状、予測2023-2029」、公益社団法人高分子学会HP、他公開レポート情報

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https://www.meti.go.jp/meti_lib/report/2023FY/000066.pdf

ANALYST NET Company Report

GCC Management™ Analysis Report: Tamagawa Holdings Co., Ltd.

JASDAQ (Standard) Securities Code: 6838 September 10, 2020

Creating shareholder value consistent with Sustainable Development Goals, in high-growing communication and energy infrastructure fields, by deploying technology and financial prowess

Related areas with high growth potential			
Segment		Details	Period and CAGR
Electronic and Communication Device Business	5G capital spending	Global 5G-related capex estimate: \$3.6 bln in 2020 to \$41.8 bln in 2026 (Source: https://edge-of-cloud.blogspot.com/2017/06/5g-and-ite-infrastructure-spending.html)	2020 - 2026 50.5% (11.6 times)
		Global 5G-related capex estimate: CAGR of 64.1% in 2017 - 2025 (Source: Infinium Global Research)	2017 - 2025 64.1% (17.4 times)
	Small atomic clocks	The world's market for small atomic clocks: \$9.402 mln in 2017 to \$23.402 mln in 2025 (Source: QY Research "Global Miniature Atomic Clock Market Insights, Forecast to 2025")	2017 - 2025 12.1% (2.5 times)

https://www.tmex.co.jp/dcms_media/other/en_20200911.pdf



QYResearch引用案例

国外企业引用情况

EPSON

P8

- ¹ Renewable electricity adoption ratio at all Epson Group sites. Excludes some sales sites and leased properties where the amount of electricity consumed cannot be determined.
- ² Ratio of sustainable resources (renewable resources + closed-loop materials + less depletable resources) to raw materials
- ³ Source: IDC's Worldwide Quarterly Hardcopy Peripherals Tracker 2024Q2 Share by Brand
- ⁴ Source: IDC's Worldwide Quarterly Hardcopy Peripherals Tracker 2024Q2 Share by Brand. Laser printers = up to 90 ppm monochrome laser printers. Color laser = up to 69 ppm
- ⁵ FY2023 unit volume share for projectors with 500 lumens or more, excluding screenless TV products. Source: Futuresource Consulting Ltd.
- ⁶ Market share based on unit sales of industrial SCARA robots, 2023. (Source: Fuji Keizai: "2024 Reality and Future Outlook of Worldwide Robot Market")
- ⁷ Source: QYRESEARCH "Global Timing Device Market Report" (2023)

https://corporate.epson/en/investors/publications/pdf/integrated-report/epson_ir2024_10_e.pdf



QY Research, 2021, Global trimethylgallium
Beijing, China, QY Research press release
<https://www.qyresearch.com/index/detail/tmg-sales-market-report-2021>.)

As LED demand increased beginning in 2010, producers began expanding capacity for TMG, the metal-organic chemical used to fabricate the GaN epitaxial layer on LED epiwafers. When TMG and nitrogen gas are fed into the metal-organic chemical vapor deposition reactor and heated, a GaN layer is formed on the epiwafer. TMG's purity and quality determine an LED's brightness and reliability. There were five major TMG producers worldwide in 2021. Akzo Nobel N.V. (Netherlands) manufactured TMG in Texas; Albemarle Corp. (Baton Rouge, LA) manufactured TMG in the Republic of Korea; the Dow Chemical Co. (Midland, MI) manufactured TMG in Massachusetts and the Republic of Korea; Jiangsu Nata Optoelectronic Material Co., Ltd. (China) manufactured TMG in Jiangsu Province, China; and SAFC Hitech Inc. (a subsidiary of Sigma Aldrich Corp., St. Louis, MO) manufactured TMG in Taiwan and the United Kingdom (QY Research, 2021).

<https://pubs.usgs.gov/myb/vol1/2021/myb1-2021-gallium.pdf>



그림7 대추전자재료 영업이익 및 영업이익률 추이



자료: QYResearch Korea, 이베스트투자증권 리서치센터

<https://ssl.pstatic.net/imgstock/upload/research/company/1681948865871.pdf>



11%
SOM Market CAGR*

\$2.3B
SOM TAM by 2025*

*Source: QYResearch Global System on Module (SOM) Market Report, History and Forecast 2014-2025



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https://www.edge-ai-vision.com/wp-content/uploads/2021/05/ET082_Khona_Xilinx.pdf



感谢您的观看
THANKS

咨询热线：4006068865

邮箱：market@qyresearch.com