

## Semiconductor Trends in 2023

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HONGKONG, CHINA, March 26, 2023 /EINPresswire.com/ -- The [IC industry](#)'s survival or demise depends on the market's wind direction. It is evident that the three main markets for ICs—PC, mobile phone, and consumer electronics—are experiencing weak demand, and many IC design firms are continuing to cut back on the number of wafers they are investing in wafer foundries this year. The usual off-season of the IC design industry may be much weaker under such a semiconductor market. Whether the market will recover this year is difficult to predict. Several of the largest driver IC producers stated plainly that "the industry is still in a downturn"; other IC design factories noted that clients are very careful with their stocking because they are uncertain about the future and only prepare the bare minimum quota.

Of course, despite the fact that the consumer electronics industry is still experiencing a downturn, we shouldn't be upset about it. It is clear that a variety of applications, including artificial intelligence, augmented reality, and virtual reality, the Internet of Things, self-driving cars, cloud computing, 5G and 6G, smart cities, healthcare, etc., all depend on advancements in semiconductor technology to achieve their innovation. In other words, the semiconductor industry's development potential is vast and extensive, and after a little period of adjustment, it will unavoidably resume its rapid development. In light of this, we may continue to have high expectations for 2023 and the growth of the semiconductor sector.

Globally speaking, established technology continues to be prevalent. The production capacity of mature technology in my country still heavily depends on imports due to the limitations of the current technological development stage of domestic equipment and materials, so domestically controllable technology serves as the primary force behind subsequent domestic expansion.

The ability of independent fab companies to control core semiconductor foundry rights will be crucial to international competition. A new industrial chain structure based on the self-sufficiency of fab industries will be developed in mainland China. Three phases of building are separated: a foreign capital-led stage, a domestic capital-led stage (mostly using American equipment), and a domestic capital-led stage (mainly based on domestic equipment). Due to the United States' technology embargo, domestic equipment will be used more frequently to build fabs in the future.

The design and production linkages in the chip business have been separated, and the supply chain is geographically segmented, which has increased the possibility of a supply-demand mismatch brought on by outside sources. The sector of smart cockpits is predicted to be the center of competition in the process of tram intelligentization over the next three to five years.

Owing to a lack of chip foundries and algorithm computing power, as well as the gaps in local rules and regulations, the development of smart trams cannot in the near future be centered on intelligent driving. Before 2025, it is predicted that aided driving will continue to predominate in the field of intelligent driving, with intelligent driving innovation serving as a supplement. Long-term, autonomous driving will spell the end for sophisticated electric vehicles.

According to historical laws, the stock price will respond to the inflection point of inventory and price; take a look at the inflection point of the inventory of consumer chips and the inflection point of the localization rate of domestic semiconductors. The worst stage of the fundamentals of the semiconductor sector has passed. Consumer semiconductors are anticipated to start moving upward in 2024, with both volume and price increases.

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