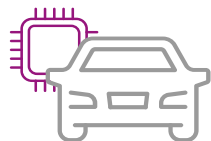


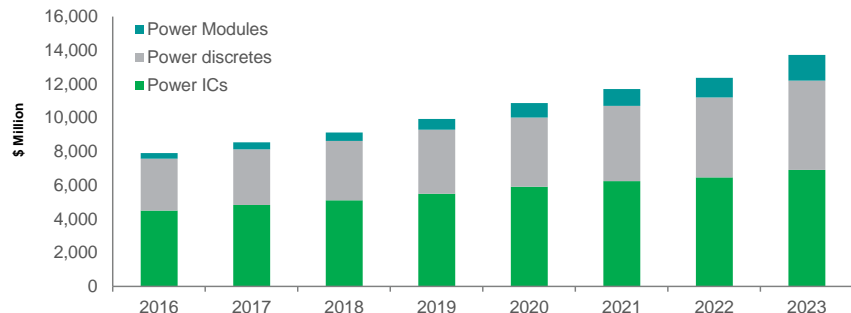


Light vehicle builds flatten, power semiconductor sales accelerate



The Power Semiconductors in Automotive report starts from vehicle build forecasts and expected electronics modules fitment rates. Power semiconductor bill-of-material estimates based on teardowns, interviews and industry knowledge combine to forecast device units, ASPs and revenues to 2023. It provides detailed global analysis of 35 automotive electronics modules and 30 power semiconductor device types.

Power semiconductor automotive revenue



Global growth forecast (2017-2023)

2% Vehicle builds



7% Power semiconductor units



6% Power semiconductor revenues



Total light vehicle electronic control units are forecast to **grow by over 50%** from 1.6B units in 2017 to 2.5B in 2023., despite current high level fitment rates in body, safety and chassis.

Functional safety requirements and maturing module lifecycles are leading to **more complex ICs (SBCs, ASICs, PMICs, etc.)** replacing standalone single function devices.

HEV-EV s are expected to be 28% of the market by 2023, driving annual **revenue growth of 11% for power discretes and 32% for power modules.**

Annual revenues in **ADAS grow 17%** as advanced safety features become a showroom differentiator across all market segments.

Power semiconductor revenue per vehicle

\$89.71
2017

\$128.54
2023

For more information, refer to the IHS Markit report at: technology.ihs.com/602939