Fan-Out Wafer Level Packaging Patent Landscape

Description: With Apple and its A10 processor employing TSMC's InFO-PoP technology, the fan-out market has exploded. Apple's involvement will undoubtedly generate increased interest in the fanout platform, and market revenue is forecast to reach around US$2.5B in 2021, with 80% growth between 2015 - 2017.

Moreover, following the high-volume adoption of InFO and the further development of fan-out wafer level packaging technologies, a wave of new players may enter the market. The supply chain is also expected to evolve, with a considerable amount of investment in Fan-Out packaging capabilities.

In such a fast-growing Fan-Out market, it is essential to deeply understand the global patent landscape in order to anticipate changes, harvest business opportunities, mitigate risks, and make strategic decisions in order to strengthen one's market position and maximize return on one's IP portfolio.

The report thoroughly investigates the Fan-Out packaging patent landscape (chip-first, chip-last, face-down, face-up, single-die, multi-chip module, package-on-package, system-in-package, etc.), and this report contains detailed patent analyses including countries of filing, patents' legal status, and patented technologies, as well as patent owners, their IP position, and IP strategies.

More than 3,100 patents relating to over 1,200 inventions on Fan-Out packaging have been published worldwide through September 2016, coming from 100+ patent applicants. A first wave of patent applications occurred from 1999-2006, induced by Infineon. Patent applications have increased since then, with Freescale (NXP), STATS ChipPAC (JCET), SPIL, Amkor, and TSMC entering the Fan-Out IP arena. Today the number of enforceable patents is increasing worldwide, with several companies already standing out by virtue of their strong IP position.

All of major players involved has filed patents on Fan-Out packaging, except for Nanium, which does not file any patents at all but instead has adopted a different IP strategy that we discuss in this report. Another special case is the presence of patent licensing companies like Polaris Innovations (WiLAN), which in 2015 acquired key patents from Infineon/Qimonda. The visibility of such companies in the patent landscape is a tangible sign of the market explodes.

In the next few years Polaris Innovations could assert its patents to make money, and in this report we present its most critical patents. We have also noted Samsung's conspicuous IP presence in the FOWLP patent landscape, despite the company's unclear market position. R&D labs are also present (i.e. Fraunhofer, A - STAR, CEA), but to a lesser extent. Most new entrants in the FOWLP patent landscape are Chinese players (HuaTian Technology, NCAP, SMIC), and more recently we have observed Apple's appearance. Apple, which this year chose TSMC's InFO-PoP technology for its A10 APE, has recently filed some patents on Fan-Out wafer level packaging (chip-last, chip-first, PoP, and SiP), reflecting a genuine interest in the FOWLP platform.

Key Features Of The Report:

- IP trends, including time evolutions and countries of patent filings
- Patents’ current legal status
- Ranking of main patent applicants
- IP collaboration, joint development, and licensing agreements
- Key players’ IP position, and relative strength of their patent portfolios
- Patent segmentation by technology solution (chip-first, chip-last, facedown, face-up), process steps (die placement, molding, planarization, RDL), architecture (multi-chip, PoP, SiP, face-to-face package), and technical challenge (warpage, die shift)
- Matrix showing patent applicants and their patented technologies
- Technical solutions found in patents for warpage and die-shift issues.
- FOWLP IP profiles for 18 key companies, including countries of filing, patents’ legal status, patented technologies, prior art strength index, IP blocking potential, partnerships, and IP strategy
- Excel database with all patents (3,100+) analyzed in this report, including technology segmentation.
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