

SPECIAL 2009 STUDY

Global Wafer Capacity Analysis and Forecast

Detailed Analysis of Existing Wafer Capacity and a Complete Forecast through 2014

- Capacity by **Wafer Size**
- Capacity by **Minimum Process Geometry**
- Capacity by **Technology Type**
- Capacity by **Geographic Region**
- Capacity by **IC Device Type**

DID YOU KNOW?

- China has not succeeded in its plan to become an IC manufacturing powerhouse.
- The top 10 companies having the most installed capacity account for nearly 55% of the total worldwide capacity.
- Well over one-third of all capacity installed is for memory products.
- In 2008, 300mm wafers became the highest volume wafer size in terms of surface area available for device fabrication, and are expected to be about 50% in 2009.
- Japan still has the world's largest amount of fab capacity, but Taiwan is expected to soon take over that position.
- South Korea has the world's highest concentration of capacity at 80nm or finer geometries.

Find details like these in this special study

The most comprehensive examination

IC Insights is proud to offer this special 2009 study on the IC industry's wafer fabrication capacity. IC Insights believes that global IC fab capacity trends have been forever altered by the worst recession in 63 years. The newly updated *Global Wafer Capacity Analysis and Forecast* report is an ideal tool for understanding the "new realities" of the market.

This study will **greatly assist IC material and equipment suppliers** in creating long-term strategic marketing plans.

Use this study to find:

- **Capacity, wafer start, utilization forecasts**
 - **Rankings of companies with highest capacity**
 - **Capacity forecasts for Taiwan, Korea, China**
 - **300mm wafer fab count and specifications**
 - **Forecasts for leading-edge (<50nm) capacity**
- ...and more!

The *Global Wafer Capacity Analysis and Forecast* is based on IC Insights' proprietary database that lists over 445 individual IC fabrication facilities representing nearly 115 companies.

This study offers a detailed breakdown of the IC industry's wafer fab capacity as it stood at the mid-point of 2009 and then projects capacity for each year through

2014. The data were compiled, summarized, and extended into the future using both bottom-up and top-down research methodologies. Surveys of hundreds of fabs from around the world formed the basis for analyzing the industry's current capacity status. Future projections were based on both survey results and IC Insights' overall economic forecast for the IC industry.

DATA ARRANGED IN SEVERAL CATEGORIES

Wafer Size

300mm, 200mm, 150mm, 125mm, 100mm

Minimum Geometry

$\geq 0.7\mu$, $< 0.7\mu - \geq 0.4\mu$, $< 0.4\mu - \geq 0.3\mu$, $< 0.3\mu - \geq 0.2\mu$, $< 0.2\mu - \geq 0.16\mu$,
 $< 0.16\mu - \geq 0.12\mu$, $\leq 0.12\mu - \geq 80\text{nm}$, $< 80\text{nm} - \geq 50\text{nm}$, $< 50\text{nm}$

Technology Type

CMOS, BiCMOS/BCD, Bipolar

Geographic Region/Country

Americas, Europe, Japan, Korea, Taiwan, China, ROW (Rest of World)

IC Device Type

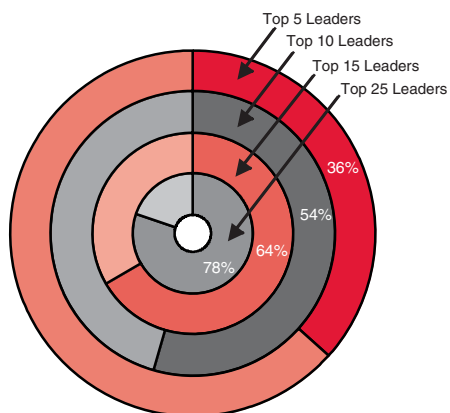
Analog, Memory, Logic, Microcomponent, Foundry

A detailed breakdown of wafer capacity in mid-2

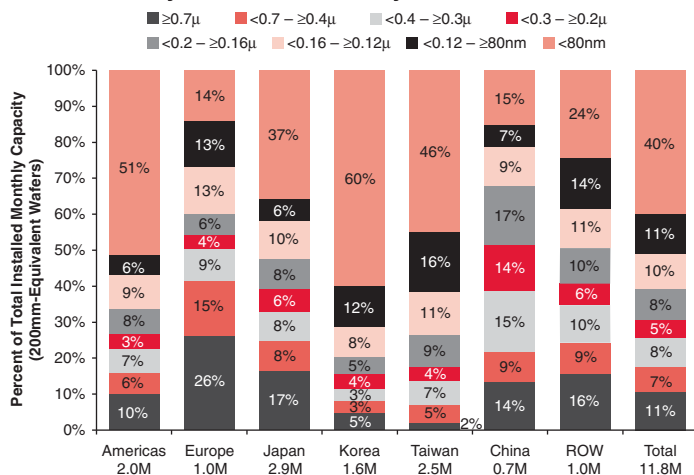
of the IC industry's wafer fab capacity

SOME OF THE MORE THAN 50 CHARTS AND TABLES

Capacity Leaders' Shares of WW Capacity as of Jul-2009
(11.8 Million 200mm-Equivalent Wafers per Month)



Installed Monthly Capacity for Each Geographic Region by Minimum Geometry as of Jul-2009



Regional Capacity by Product Type as of Jul-2009
(200mm-Equivalent Wafers Per Month x1000)

Product	Americas	Europe	Japan	Korea	Taiwan	China	ROW	Total
Analog	278	303	373	30	19	63	95	1,161
Memory	563	105	1,124	1,128	1,166	91	206	4,383
Logic	270	206	824	211	51	3	80	1,645
Micro	633	285	386	26	5	4	126	1,465
Foundry	165	74	117	167	1,260	553	395	2,731
Other	56	61	97	57	0	5	106	382
Total	1,965	1,034	2,921	1,619	2,501	719	1,008	11,767

- 113 Manufacturers Included in the Data Compilation
- Annual IC Industry Wafer Capacity History and Forecast
- Worldwide Annual Installed Capacity Trends
- Changes in Worldwide Annual Capacity Volume
- Installed Wafer Capacity Leaders
- Capacity Leaders' Shares of Total WW Capacity
- Capacity Leaders per Geographic Region
- Worldwide Installed Capacity by Geographic Region
- Regional Installed Capacity by Wafer Size
- Installed Capacity for Each Wafer Size by Region
- Installed Capacity Forecast by Geographic Region
- Worldwide Installed Capacity by Wafer Size
- Installed Capacity Leaders per Wafer Size
- 300mm Wafer Fabs
- 300mm Wafer Starts and Fab Count
- Number of Companies with 200mm vs. 300mm Fabs
- Potential 450mm Wafer Players
- Installed Capacity Forecast by Wafer Size
- Worldwide Installed Capacity by Process Technology
- Regional Installed Capacity by Process Technology
- Worldwide Installed Capacity by Minimum Geometry
- Regional Installed Capacity by Minimum Geometry
- Installed Capacity Leaders per Minimum Geometry
- Installed Capacity Forecast by Minimum Geometry
- SICAS' Historical Wafer Capacity by Dimensions
- Worldwide Installed Capacity by Product Type
- IC Devices Contained Within Each Product Category
- Foundry Capacity by IC Device Type
- Regional Installed Capacity by Product Type
- Installed Capacity Forecast by Product Type

Each Purchase Includes:



Three-ring binder copy for ...

Quick access to an off-the-shelf reference.



CD-ROM copy for ...

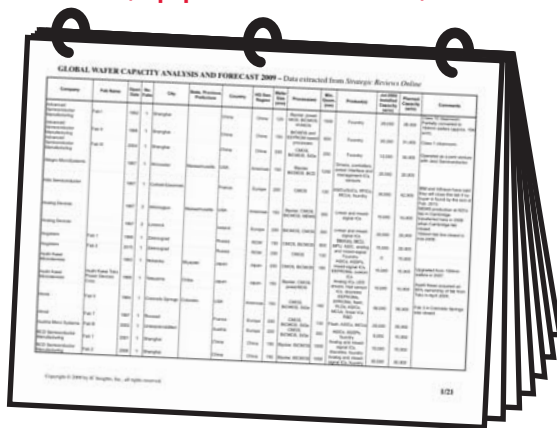
Keyword searching and portability with indexed Adobe PDF documents, Excel spreadsheets of fab data, as well as color graphics files of charts, tables, and illustrations for use in your presentations.

Free call-in privileges on information presented.

**\$500 Discount
for Repeat Clients***

DETAILED FAB SPECS PROVIDED

(in paper and electronic form)



Company • Fab Name and Location • Date Opened • Wafer Size and Capacity • Process(es) • Minimum Geometry • Product(s)

ORDER FORM – Global Wafer Capacity Analysis and Forecast 2009

1 ORDER OPTIONS (choose one)



Individual Subscriber

Includes both binder and CD-ROM copies.

Individual Subscriber \$3,985 x 1 = \$ _____

Discount for Repeat Clients* **-\$500** = \$ _____



Company-wide Use Subscriber

Includes both binder and CD-ROM copies, as well as a redistribution license for company-wide use.

Multi-User Corporate License \$6,790 x 1 = \$ _____

Discount for Repeat Clients* **-\$500** = \$ _____

Additional Copies (sent to same address) \$495 ea. x _____ = \$ _____

TOTAL: = \$ _____

*Discount offered to clients that purchased the Global Wafer Capacity study in previous years.

2 PAYMENT METHOD (choose one)

Credit Card American Express MasterCard Visa
Card # _____ Exp _____

Cardholder Name _____

Signature _____

Billing and shipping addresses the same? Yes or No
If not, please provide billing address

Company Check Payable in U.S. dollars to IC Insights.

Order will ship upon receipt of check.

Purchase Order P.O. # _____

Please fax or attach copy of purchase order.

3 SHIPPING ADDRESS

Name _____

Title/Position _____

Company _____

Address _____

Suite/Mail Stop _____

City _____

State/County _____

Zip/Postal Code _____

Country _____

Phone _____ Fax _____

E-Mail _____

Is this the end-user? Yes or No (N/A for multi-user license)
If not, please attach end-user contact information

4 SEND ORDER. THANK YOU!

FAX: +1-480-348-9745

PHONE: +1-480-348-1133

MAIL: IC Insights, Inc.
13901 North 73rd Street, Suite 205
Scottsdale, Arizona 85260 USA

E-MAIL: Send pertinent information to
order@icinsights.com

web

SATISFACTION GUARANTEED

Your satisfaction is important to us. If the subscription does not meet your needs, you may cancel it within 15 days for a full refund.

To learn more about other market research services and publications offered by IC Insights, visit our web site at www.icinsights.com