Semiconductor Equipment Industry Report, 2009

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Abstract

The drastic fluctuations in semiconductor industry are astonishing. NAND flash memory stood out conspicuously during the period of 2005-2007, the shipment boosted up, and manufacturers successively invested in NAND field. The emerging DDR2 was once promoted greatly by Microsoft Vista. In wafer OEM, a fierce competition on advanced manufacturing process is under way, and the manufacturers all have continuously pushed forward 90nm and 65nm, so the shipment of semiconductor equipments increased considerably. The coming into being of new packaging forms such as FC, CSP, and WLP also conduced to the development of semiconductor equipment industry. Therefore, the period from 2005 to 2007 was the boom for semiconductor industry, and many manufacturers doubled their revenue. However, while they were in high spirits, the semiconductor industry had started to plunge.

The decline in 2008 was just the beginning, the year of 2009 witnessed more dramatically drop, and the revenue of nearly all the manufacturers was less than 50% of the level in 2007, or even 20%. Especially lithography industry in the front-end area of semiconductor equipment, the top three manufacturers, ASML, NIKON and CANON, respectively fell by 44%, 73% and 84%. Almost all the manufacturers have suffered the loss.

It was a bit better for the manufacturers in the back-end field of semiconductor equipment industry, particularly testing sector, it witnessed a small drop.

The situation improved in the second half of 2009, particularly in memory field, the largest market in semiconductor equipment industry. In IDM sector, Intel is still the largest semiconductor equipment client. Since semiconductor equipment industry is lack of unparalleled applications, revolutionary products and technologies, so it is not likely that the rapid growth during 2005-2007 will come back.

Global Top 20 Semiconductor Manufacturers by Revenue, 2007-2009 (Unit: US$ mln)

	2007	2008	2009	Operating Profit Margin, 2009
Applied Material	6,788	4,088	2,008	7.8%
ASML	4,609	3,525	1,960	-8.5%
Tokyo Electron	5,362	3,453	1,558	-21.0%
KLA-Tencor	2,326	1,771	1,520	-38.0%
Lam Research	2,245	1,502	1,116	25.2%
Nikon	1,806	1,333	488	-23.6%
Carl Zeiss SMT	1,208	1,314	1,068	10%
Dainippon Screen	1,196	832	746	
Teradyne	707	825	728	-21.7%
Advantest	1,608	788	340	-37.7%
ASM International	1,023	787	519	-24.7%
Hitachi High-Technologies	960	711	688	-24.0%
Novellus system	1,200	703	398	-19.4%
Canon	784	608	98	
Varian	863	491	362	-11.9%
Verigy	633	464	336	-32.7%
Daifuku	335	402	138	
Aixtron	261	366	349	13.2%
Hitachi Kokusai Electric	618	361	178	-17.4%
Tokyo Semitsu	568	334	128	

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