Global and China Semiconductor Equipment Industry Report, 2014-2015

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Global and China Semiconductor Equipment Industry Report, 2014-2015covers the following:

1. Global Semiconductor Market and Industry;
2. China Semiconductor Market and Industry;
3. Global and China Semiconductor Equipment Market and Industry;
4. Fifteen Semiconductor Equipment Vendors

In 2014, the global semiconductor equipment market size totaled USD38 billion, up 10.4% from 2013. It is predicted that in 2015 this figure will climb to USD40.5 billion, a rise of 6.7% from a year ago, and that the market size in 2016 will slump by 5.6% as compared to 2015. However, the possible shrinkage in 2016 might come from the following factors:

Firstly, following a peak in 2014, main electronic products such as smartphones and tablet and laptop PCs have stagnated or declined. This is particularly true of tablet PCs, which has presented a significant decline. On the other hand, equipment market delays being sluggish but will without doubt decline in 2016.

Secondly, due to the global deflation, prices for bulk commodity led by oil and iron ore plunged and would cause knock-on effect, which would in turn result in a fall in semiconductor equipment prices.

Thirdly, global economic recovery will probably come to a halt, with the US GDP dropping by 0.7% in 2015Q1. Moreover, China's GDP growth slowed obviously. The both countries constituted the major driving force of the global economy. The stimulatory effect of US QE began to fade away, and therefore the economy might go down.

In the future, it is difficult to come up with a start product like smartphones. Thus, the prospects for the semiconductor industry remain uncertain.

In 2014, semiconductor equipment vendors made remarkable performance, with a substantial rise in operating profit, though their revenue did not increased. The merger of Applied Material and Tokyo Electron was rejected by the US Department of Commerce. In future, more of M&A plans may well be intervened by the government, after all semiconductor equipment market is a highly concentrated market.

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In 2015, the Chinese semiconductor companies and institutions showed their strength, launching a series of mergers and acquisitions. The Chinese enterprises are adept in and fond of capital operation rather than industrial production. The semiconductor equipment market size in China will reach USD4.4 billion in 2015, of which the domestic companies, mostly engaged in low-end equipment, will account for just 14%.

Revenue of Major Global semiconductor Vendors, 2006-2015 (USD mln)

(USD mln)

Ranking	Company	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
1	ASML	4,538	5,145	4,367	2,268	5,976	7,551	6,080	6,858	7,758	7,820
2	Tokyo Electron	5,030	6,291	4,343	2,324	5,827	5,802	5,270	4,720	4,523	5,518
3	Applied Materials	6,557	6,512	4,005	1,960	5,304	5,415	5,536	4,775	5,940	5,980
4	KLA-Tencor	2,349	2,771	2,112	1,323	2,893	2,876	3,102	2,606	2,886	2,710
5	Lam Research	2,201	2,624	1,904	1,198	2,952	2,804	3,170	3,680	4,861	5,100
6	Dainippon Screen	1,723	1,740	1,141	1,105	2,160	2,105	1,770	1,638	1,471	1,460
7	Nikon	1,881	2,148	1,742	787	1,168	1,646	1,330	2,030	1,600	1,890
8	Advantest	1,907	1,657	884	416	1,135	1,547	1,806	1,510	1,440	1,610
9	ASM International	548	612	401	218	407	625	476	610	723	730
10	Teradyne	1,089	877	925	552	1,565	1,429	1,160	1,023	1,300	1,330
11	Novellus Systems	1,637	1,510	970	582	1,308	1,319	Acquired by Lam Research			
12	Hitachi High-Technologies	1,264	1,385	1,056	474	1,093	1,139	1,290	1,180	1,160	1,090
13	Varian Semiconductor Equipment	786	1,074	687	396	1,088	1,096	Merged into Applied Materials in 2012			
14	Kulicke & Soffa	371	328	225	763	830	791	785	500	597	650

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