

Semiconductor WEEK:

An overview of results and conclusions from the week's reports at VLSI

- **Semiconductor Stocks**

- Chip Stocks bounce back and beat the S&P 500 amid better-than-feared results.
- UTEK soars as the company raises its yearly sales outlook

Semiconductor Analytics

- Semiconductor market shifting to favor Non-Application Specific ICs
- PC ICs bounce off lower channel in July
- Handset & Tablet IC sales soft
- Wireless Infrastructure IC demand hot
- Server & HPC IC upper channel continues to slope down
- Flash is pulling back ahead of DRAM
- DRAM price holiday ends
- Mobile DRAM in wireless demand slump
- Auto softens with weakening auto market
- LED, MEMS, and Power stay hot

- **The Chip Insider® Graphics & Weather Report**

- Equipment Order activity fell
- Foundries and Memory continued to pull back
- VLSI's CPPI fell as spot prices turned south across the board.
- 300mm utilization approaching buy levels

- **Emerging Markets & Strategy**

- Semicon West Highlights
 - The Best of West
 - Will Qualcomm build a fab?

- **VLSI's Uploads**

- None

The Best of West

- Semicon has transitioned to private meetings and little PR
- As a result commenting on good parts of the discussions have become impossible in order to maintain confidentiality
- Here is VLSI's BEST in West list from Semicon 2012:
- Best New Tool: EV Group's EVG[®]850TB/DB automated temporary bonding and debonding system
 - To support thin-wafer processing for high-volume 3D IC and TSV manufacturing
- Best PR party: Impress Labs
 - Central location and number of companies and crowds was impressive
- Best Customer Party: Soitec's SF MOMA Reception
 - Best high caliber attendance
- Best off the beaten path product: Red's glass coated cast copper bonding wire

Strategy & Tactics

- Dan's take on the Best of West
 - The New Semicon Sales Model
 - Soitech hits home run with 2D FD SOI
 - Edwards with their vacuum vision
 - RED Micro Wire copper bonding wire
 - Addresses headache of oxidation and die-cracking, dielectric-busting hardness
- The Growing U.S. Centricity of the Semiconductor Industry
 - largest number of new fab projects in U.S.
 - Intel and Samsung only chip makers in the \$10B cap ex club
 - both invest heavily in the U.S.
- Will Qualcomm build a fab?
- ASML and Intel: Strategic Brilliance
- Maxims applied: Nokia's failure