

# 2008 POST SHOW REPORT

## OVERVIEW



### SEMICON® West 2008

Event: July 15–17, 2008

Moscone Center, San Francisco, California, USA

SEMICON West is the flagship annual event for the global microelectronics industries, featuring manufacturing products and technologies for semiconductors, photovoltaics, MEMS, solid state lighting, flexible electronics, and related technologies.

#### SEMICON West 2008 Highlights:

- *Verified visitor attendance increased 19%*
- *Increased attendance across all major product interest categories*
  - *85% increase in manufacturing equipment interest*
  - *58% increase in materials interest*
- *Increased focus on photovoltaic and solar technologies, including new co-location with Intersolar North America*
- *First SEMI Packaging Summit, featuring Amkor, IBM, Intel, R3Logic, and TSMC*
- *Keynotes from Elpida Memory, IBM, Intel, Cadence Design Systems, and the Telecommunication Industry Association*

## EXHIBITORS

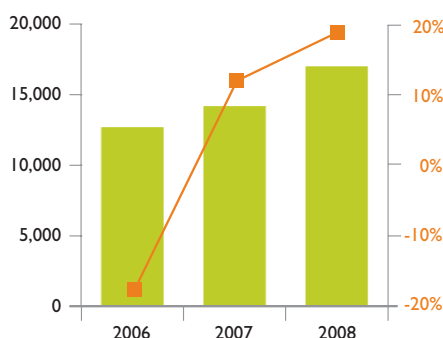
	2008
Number of Exhibiting Companies	1,121
Net Exhibit Space in Square Feet	274,770

## REGISTRATION

### Registration increased over 2007:

*Verified visitor attendance grew 19% in 2008.*

Verified Visitors 2006–2008



	2008	2007	+/-
Total Verified Visitors	17,048	14,348	19%
Registered Visitors	27,845	24,160	15%
Registered Exhibitors	17,619	17,858	-1%
Total Registered (including exhibitors)	45,464	42,018	8%
Total Verified International Visitors (from outside the U.S.)	2,523	2,394	5%

## SEMICON West and Intersolar North America

Registered Visitor Interest	
SEMICON West and Intersolar	55%
SEMICON West—Only	41%
Intersolar—Only	5%

Total equals more than 100% due to rounding.

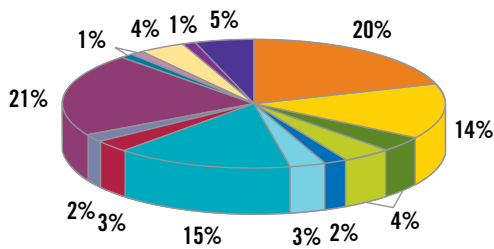
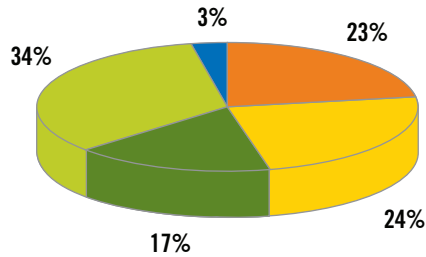
## VISITOR INFORMATION

**SEMICON West attracts the decision-makers who influence and direct the selection of products and suppliers.**

*SEMICON West attendees represent every level and every discipline in the buying cycle.*

### Visitor Job Levels

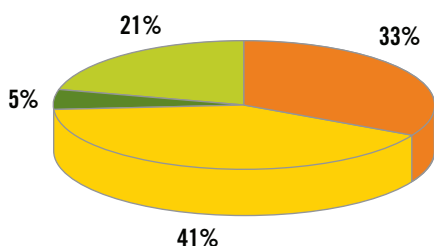
Executive Management (Chair, President, Chief, etc.)	23%
Senior Management (VP, Director, etc.)	24%
Other Management	17%
Staff (non-management)	34%
Other	3%



### Visitor Main Job Function

Executive Management	20%
Manufacturing / Engineering / Operations Management	14%
Product Management	4%
Fabrication and Process Engineering	4%
Assembly / Packaging Engineering	2%
Quality Assurance and Test Engineering	3%
Research and Development Engineering	15%
Purchasing / Procurement	3%
Facilities Engineering / Engineering Support	2%
Marketing and Sales	21%
Environment, Health & Safety	1%
Government / Public Policy	1%
Financial / Industry Analyst	4%
Training	1%
Other	5%

**40% of visitors represent engineering functions, with 15% involved in R&D engineering and 14% involved in manufacturing (fab) management.**



### Visitor Purchasing Authority

Final Decision Maker	33%
Recommend	41%
Specify or Evaluate	5%
No Role	21%

**Powerful buying influence: 79% of SEMICON West visitors are involved in product selection and purchasing.**

## VISITOR INFORMATION

***SEMICON West visitors are interested in a diverse range of products and technologies.***

*Product segment interests grew significantly at SEMICON West 2008, with growth across all major product areas.*

Visitors Product Interest*		
Equipment	41%	% change from 2007
CMP	26%	+995%
Wafer Processing Equipment	22%	+169%
Deposition (CVD, PVD, ALD, Plating)	21%	+131%
Test Equipment	21%	+21%
Inspection & Measurement Products	16%	+33%
Nanotechnology Equipment / Tools	15%	+168%
Assembly & Packaging Equipment	12%	+77%
<b>Materials</b>	<b>16%</b>	
Wafers and Substrates	17%	+39%
Photovoltaic Materials	15%	+370%
Process Materials	12%	+28%
Chemicals & Solids	11%	+10%
Nanotechnology Materials	11%	+131%
Assembly & Packaging Materials	10%	+37%
<b>Solar</b>	<b>32%</b>	
Photovoltaic Cells and Modules	28%	‡
Equipment and Materials	19%	‡
Photovoltaic Installations and Components	14%	‡
Inverters	13%	‡
PV Power Plants	13%	‡
PV Concentrator Systems	10%	‡
<b>Other Products and Services</b>	<b>11%</b>	
Business Services or Consulting	7%	+23%
Factory Control Automation/Facilities	7%	+23%
Sub-Systems	7%	+187%
Design Software	6%	+11%

\* Multiple answer questions. Primary categories reflect percentage of total visitor's responses (108,248); selected detailed categories reflect percentage of verified visitors (17,048)

‡ New category for 2008

***SEMICON West attracts the most diverse and global audience of any industry event.***

*International attendance grew 5% in 2008, with international attendees representing 15% of all visitors.*

International Visitors					
<b>Japan</b>	27%	<b>Singapore</b>	4%	<b>Other Europe</b>	8%
<b>South Korea</b>	16%	<b>China</b>	3%	<b>Other Asia</b>	5%
<b>Germany</b>	12%	<b>United Kingdom</b>	3%	<b>Other</b>	6%
<b>Taiwan</b>	6%	<b>France</b>	2%		
<b>Canada</b>	6%	<b>Israel</b>	2%		

## CUSTOMERS REPRESENTED

*SEMICON West is integral to the product qualification and selection process of every major device manufacturer and OEM in the microelectronics industry.*

## Customers at SEMICON West 2008 Include:

### IDMs/ Fabless

- Altera
- AMD
- Analog Devices
- Atmel
- Avago
- Broadcom
- Cypress
- Elpida
- Fairchild
- Freescale
- Hynix
- IBM
- Intersil
- IM Flash
- Infineon
- Intel
- Intersil
- LSI
- Marvell
- Maxim
- Micrel
- Micron
- nVidia
- National Semiconductor
- NEC
- Numonyx
- NXP
- Powerchip
- Qimonda
- Qualcomm
- SanDisk
- Spansion
- Texas Instruments
- Toshiba
- Vishay
- Winbond
- Xilinx

### Foundries

- Chartered
- SMIC
- TSMC
- UMC
- X-Fab

### OEMs

- Advantest
- ASM
- ASML
- Applied Materials
- Canon
- Dainippon Screen
- KLA-Tencor
- Lam Research
- Nikon
- Teradyne
- Tokyo Electron
- Verigy

### Packaging/Test Companies

- Amkor
- ASE
- SPIL/Siliconware
- STATSChipPAC
- UTAC

### Solar/PV

- BP Solar
- Kyocera
- Nanosolar
- Q-Cells
- Solaria
- Solexel
- Solyndra
- SunPower
- SVTC

## Products Sold by Visiting Companies \*

<b>Device Manufacturing</b>	<b>29%</b>
Semiconductor (IC or Discrete Device Manufacturing /IDM)	25%
Photovoltaic	13%
Test, Assembly and Packaging Contract Service Provider	9%
Nanotechnology	6%
Wafer Fab Foundry Services Provider	5%
<b>Equipment</b>	<b>25%</b>
Wafer Processing Equipment	13%
Photovoltaic Equipment	9%
Test Equipment	8%
Inspection and Measurement Products	7%
Assembly and Packaging Equipment	6%
<b>Materials</b>	<b>21%</b>
<b>Sub-Systems, Components or Parts</b>	<b>5%</b>
<b>Other Products and Services</b>	<b>20%</b>

\* Multiple answer questions. Primary categories reflect percentage of total visitor's responses (46,819); selected detailed categories reflect percentage of verified visitors (17,048).