

# Semiconductor WEEK:

June 10, 2022

*An overview of results and conclusions from recent reports at TechInsights*

## Chip Market Research Services

### ***All eyes are focused on 2023***

- Order activity for semiconductor equipment resumed its decline, slipping 1.1 points in the first week of June
- Fab Capacity Utilization by Node

## Semiconductor Analytics

### **Last Week in the Semiconductor Market:**

Semiconductor sales growth dipped to single digit W/Y rates last week, with sales above 2021 levels. The IC weather was mixed with a 0°F rise last week. Zooming in on Analog & Power growth this week, the 13-wk MA continues to decelerate to the low 20% range. Growth is forecast to finish 2022 around +17% Y/Y, reaching \$111B.

TechInsights' IC Supply/Demand indices were mixed for the week, the DRAM Glut eased to Saturated, but More Moore Foundry eased from Tight to Balanced. NAND, IDM, More than Moore Foundry, OSAT, and Analog & Power remained Tight. Auto ICs are still in a Shortage.

Inflation in Electronics' Retail Prices is abating.

## Customer Satisfaction Survey

**White Paper:** Plasma-Therm The Top Etch & Clean Supplier in the TechInsights Customer Satisfaction Survey

## Chip History Center

**People:** In the early 2000s, a visionary team began to develop the first functional wafer fab AI decision making system under the leadership of one of the industry's greatest manufacturing legends, **Gary Heerssen**. Originally taped in 2004, **Thomas Sonderman** discusses Automated Precision Manufacturing

## The Chip Insider

**Strategy and Tactics:** Inflation – Why it's good for Semiconductors

## **Semiconductor Stocks**

- *TechInsights' Semiconductor Stock Indices sunk along with the market*
- *Semiconductor Stock Index sunk to a new yearly low*
  - *SMIC was this week's biggest winner*
- *Semiconductor Equipment Stock Index sunk*
- *EDA Stock Index plummeted*
- *Electronics Materials Stock Index decreased*
  - *SOITEC came out on top*
- *Hottest Stocks: SMIC, SkyWater Technology, Nikon, ASM Pacific Technology, MediaTek, and SOITEC*

**TechInsights**



# The Top Etch & Clean Supplier

## TechInsights Customer Satisfaction Survey 2022



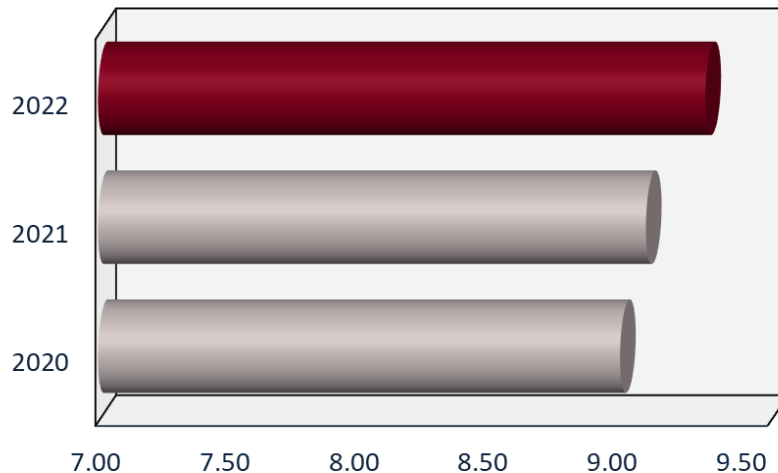


# Plasma-Therm ranks as 10 BEST Focused Chip Making Supplier



- Plasma-Therm awarded 5 Stars in the 10 BEST *Focused Suppliers of Chip Making Equipment*
  - improves 10 BEST rating by 23 basis points to an incredible 9.35
- Takes highest ratings of all 10 BEST *Focused Suppliers of Chip Making Equipment* in *recommend supplier, commitment, and overall value*
- Customers award Plasma-Therm with RANKED 1<sup>st</sup> in *Etch & Clean Equipment*
- Plasma-Therm's expertise in plasma processing technologies makes it the preferred supplier to major manufacturers and research institutions

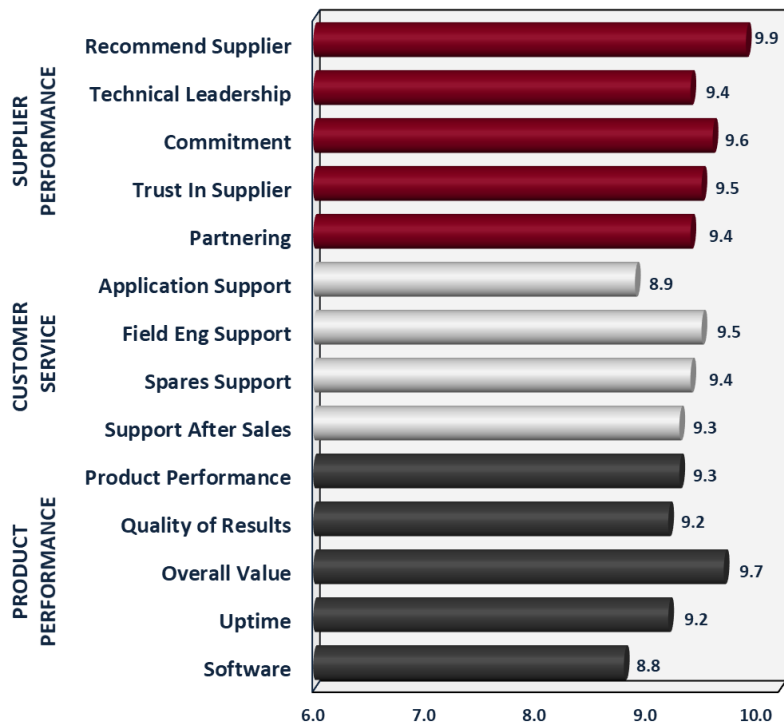
**Plasma-Therm's 10 BEST Award History**



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# How Customers Perceive Plasma-Therm

- Customers honor Plasma-Therm with an average rating of 9.6 in *Supplier Performance*
  - earns an exceptional 9.9 in *recommend supplier*
- Improves its ratings in 8 categories
  - *recommend supplier* and *overall value* up 80 basis points
  - *commitment* up 70 basis points
  - *technical leadership, quality of results, and uptime* up 40 basis points
  - *product performance* up 30 basis points
  - *application support* up 20 basis points
- Highest scores\*
  - *Recommend Supplier*
  - *Overall Value*
  - *Commitment*
  - *Trust In Supplier*
  - *Field Engineering Support*



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[Click for White Paper](#)

**Tech**  
Insights

# The Chip Insider<sup>®</sup>'s Graphics File

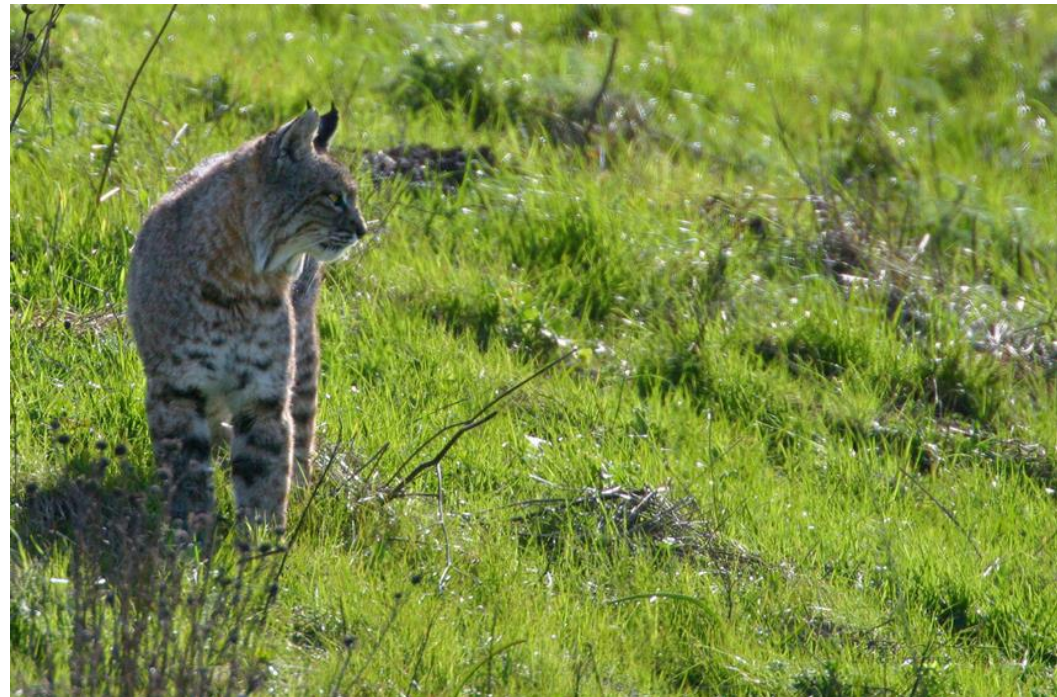


## May 2022

*All eyes are focused on 2023*

- Order activity for semiconductor equipment resumed its decline, slipping 1.1 points in the first week of June
- With the backlogs hovering at all-time highs and bookings stretching into 2023, the equipment market has plenty of runway left
- TechInsights' Chip Price Performance Index continued to trend lower, but at a slower rate

Forecast as of May 2022:	2021	2022
<b>Semi Equipment (\$B):</b>	<b>\$ 126.6</b>	<b>\$ 152.4</b>
Sequential Change	36.6%	20.3%
<b>Capacity Utilization:</b>	97.2%	96.9%
<b>ICs (\$B):</b>	<b>\$ 492.3</b>	<b>\$ 571.7</b>
Sequential Change	27.4%	16.1%
<b>IC Units (BU):</b>	394.2	439.0
Sequential Change	23.7%	11.4%
<b>Electronics (\$B) :</b>	<b>\$ 2,574</b>	<b>\$ 2,758</b>
Sequential Change	18.9%	7.1%



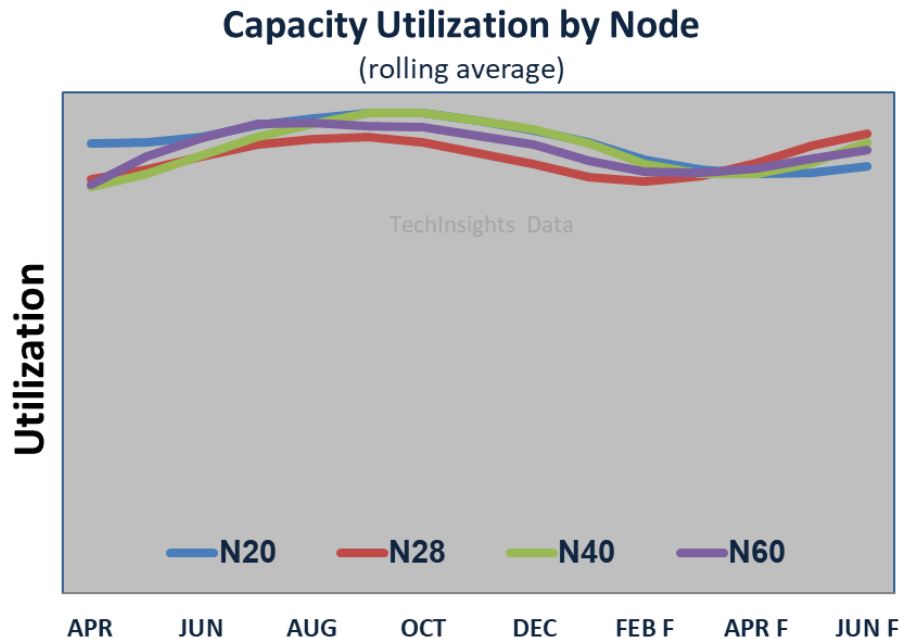
[Contact us to access more details](#)

# The Chip Insider<sup>®</sup> Graphics

## Capacity Utilization by Node:

- Utilization rates remain at high levels

**Fab Capacity Utilization by Node:** chart gives rolling averages for 20nm 22nm 28nm 32nm 40nm 45nm 60nm 65nm and larger



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## Workforce Development Solutions...

with Ajit Manocha of SEMI



## What the conversation is about:

- Labor shortages have become the echo pandemic from the ravages COVID has had on the economy.
- This is no truer than in the semiconductor industry, where Workforce Development has long been on the To-Do lists of many.
- Most industry efforts appear to be more about lobbying others to do something about workforce development.
- It's really hard to do something substantive about it but SEMI is.

[Click here to watch online](#)

# Semiconductor Analytics

## Last Week in the Semiconductor Market:

Semiconductor sales growth dipped to single digit W/Y rates last week, with sales above 2021 levels. The IC weather was mixed with a 0°F rise last week. Zooming in on Analog & Power growth this week, the 13-wk MA continues to decelerate to the low 20% range. Growth is forecast to finish 2022 around +17% Y/Y, reaching \$111B.

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Inflation in Electronics' Retail Prices is abating.



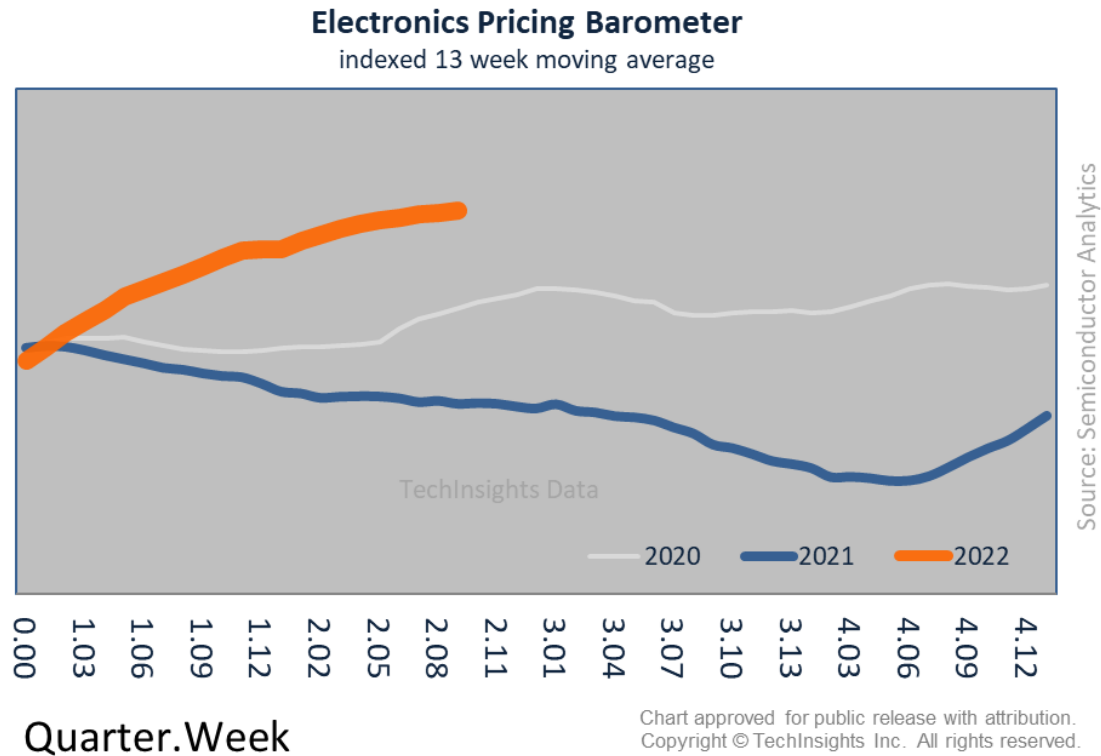
1: Measures Order Activity 2: Measures Pricing Power



# Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Inflation in Electronics'  
Retail Prices is abating



## Innovation in Memory ...

with Scott DeBoer of Micron  
Technology



## What the conversation is about:

- Scott DeBoer of Micron Technology has a conversation with Dan Hutcheson about what it takes to innovate in Memory today. Scott leads Micron's global technology development and engineering efforts – from silicon design to high-value system solutions.

[Click here to watch online](#)



**Strategy and Tactics:** Inflation – Why it's good for Semiconductors

### Summaries:

**Inflation – Why it's good for Semiconductors:** Price inflation is something one hears about almost every day. Running in the high single-digit range in most large countries. Its impact reverberates up and down the semiconductor supply chain on a daily basis as supply chain managers try to find cheaper alternatives and senior managements hold cabals with sales and marketing over when, how, and where to raise prices. The short-term disruption is clearly bad. But the long-term gains to be made, once the short term is adjusted for and new business models emerge, will be great for the winners who prevail over the challenge...

A strategic inflection point similar to that reached by the auto industry in the mid-1920s – something my father and I predicted would eventually happen in a 1996 Scientific American article titled, "Technology and Economics in the Semiconductor Industry" is happening today... around 10 years ago, I wrote Chip Insiders with predictions of manufacturing costs starting to rise significantly in the early 2020s if the industry failed to execute on 450mm. That said, it's clear to everyone areal productivity gains in fabs are not keeping up with rising manufacturing capacity and fab costs. Hence the need for a profitable reversal in the roughly 20-year decline in ASPs...

This is most apparent in DRAMs, which have faced the storms slowing shrinkonomics the longest... they have been able to systematically raise revenue-per-square-inch of silicon produced. And they have been profitable while doing it.

**The Opportunities:** So what's good about the inflation conversation in the overall economy, is that it provides a smoke screen to ease the ... to an inflationary future. Whatever happens tactically across these markets, the strategic message is clear: semiconductor inflation is here to stay... To paraphrase Falstaff in Shakespeare's The Merry Wives of Windsor "The world is semiconductor's oyster, which with fab will open."

**Dan's Book Shelf:** Leading Change by John Kotter and Change by John Kotter, Vanessa Akhtar, and Gaurav Gupta.

*"If you don't like what's being said, change the conversation"*

— Don Draper, Mad Men

[Contact us to get the full report and more](#)



**People:** In the early 2000s, a visionary team began to develop the first functional wafer fab AI decision making system under the leadership of one of the industry's greatest manufacturing legends, [Gary Heerssen](#). The team's lineage was from TI's and IBM's fully automated fabs built in the seventies and eighties. They took the lessons they learned there to build a system that would enable them to compete against companies with five times their resources. The system they built was composed of 3 parts: advanced process control, integrated production scheduling, and yield management systems to keep a fab operating efficiently. Here are some video conversations about what they accomplished and where they were going:



Originally taped in 2004, [Thomas Sonderman](#) discusses Automated Precision Manufacturing and how it allows a company to compete effectively in the semiconductor industry. The interview covers the IT needs in semiconductor manufacturing.



Dick Deininger discusses Advanced Process Control technology in wafer fabs in this 2003 interview series. He also expands on how their partnership with IBM was helping them compete more effectively: [Dick Deininger on Advanced Process Control](#) [Where is APC used?](#)

[Joint Process Development with IBM](#)

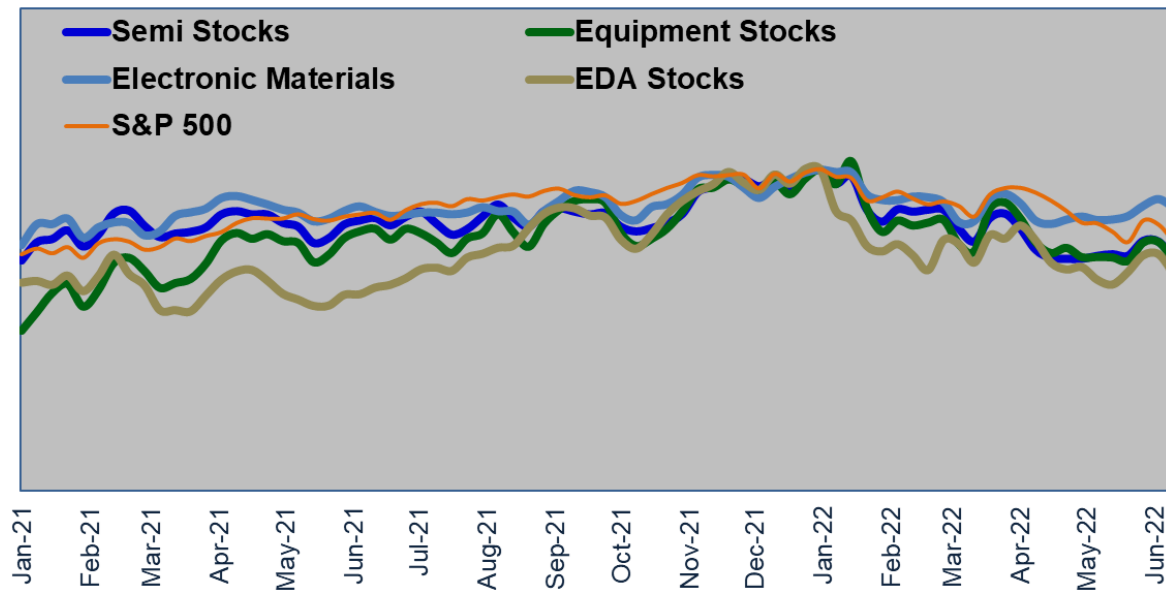
# semiStockWEEK:

*TechInsights' Semiconductor Stock Indices sunk this week along with the market as inflation continues to soar. Semiconductor Index fell to a new yearly low.*



## Semiconductor Industry Stock Performance Indices

(Stock Prices Indexed to 100 in last week of 2021)



### TechInsights' Stock Indices:

Semiconductors -5.2%  
Equipment -5.7%  
Electronic Materials -2.5%  
EDA -6.5%



# Semiconductor Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			6/10/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
<b>IDM</b>			<b>Fab-lite to Fabless</b>		
Intel	-9.7%	12	AMD	-10.8%	21
Micron	-10.5%	6	Analog Devices	-5.0%	16
ON Semiconductor	-4.4%	13	Broadcom	-3.9%	14
Samsung Electronics	-4.5%	—	IBM	-3.5%	14
SK hynix	-3.3%		Infineon	-10.1%	15
STMicroelectronics	-8.4%	11	MagnaChip Semiconductor	-6.7%	14
Western Digital	-10.1%	7	MaxLinear	-2.0%	9
<b>Foundry &amp; OSAT</b>			MediaTek	3.6%	—
Amkor	-7.1%	7	NVIDIA	-9.3%	29
ASE	-3.0%	8	Panasonic	-8.1%	10
GLOBALFOUNDRIES	-11.9%	23	Qualcomm	-5.7%	11
JCET	-0.3%	13	Silicon Laboratories	-5.8%	34
SkyWater Technology	8.9%	—	Skyworks	-6.1%	9
SMIC	9.7%	11	Texas Instruments	-8.5%	19
TSMC	-5.4%	15			
UMC	-2.1%	9			

Above Avg

Top 4-6

Top 1-3

### TechInsights' Semiconductor Stock Index

sunk to a new yearly low this week. SMIC was this week's biggest winner followed by SkyWater Technology and MediaTek who were the only other top performers to finish in positive territory.

IDM -7.3%

Foundry & OSAT -1.4%

Fabless & Fablite -5.8%

AMD<sup>AMD</sup> Analog Devices<sup>ADI</sup> Amkor<sup>AMKR</sup> ASE<sup>ASE</sup>  
 ASX<sup>ASX</sup> Broadcom<sup>AVGO</sup> GLOBALFOUNDRIES<sup>GFS</sup>  
 IBM<sup>IBM</sup> Infineon<sup>IFNNY.PK</sup> Intel<sup>INTC</sup>  
 JCET<sup>600584.SS</sup> Micron Technology<sup>MU</sup> On  
 Semiconductor<sup>ON</sup> Panasonic<sup>PC</sup> MagnaChip  
 Semiconductor<sup>MX</sup> MaxLinear<sup>MXL</sup>  
 MediaTek<sup>2454.TW</sup> NVIDIA<sup>NVDA</sup> Qualcomm<sup>QCOM</sup>  
 Samsung Electronics<sup>005930.KS</sup> Silicon  
 Laboratories<sup>SLAB</sup> SkyWater Technology<sup>SKYT</sup>  
 Skyworks<sup>SWKS</sup> SMIC<sup>SMI</sup> STMicroelectronics<sup>STM</sup>  
 Texas Instruments<sup>TXN</sup> TSMC<sup>TSM</sup> UMC<sup>UMC</sup>  
 Western Digital<sup>WDC</sup>

# Chip Equipment & Related Stocks:

## Weekly Growth and Forward P/E Ratios by Company

**TechInsights' Semiconductor Equipment Stock Index** sunk, Nikon and ASM Pacific Technology came out on top claiming two of the top six stock spots this week.

WFE -6.1%  
Test -8.7%  
Assembly -1.8%

Applied Materials <sup>AMAT</sup> Advantest <sup>ATEYY</sup>  
ASM International <sup>ASMIY</sup>  
ASM Lithography <sup>ASML</sup> ASM Pacific <sup>0522.HK</sup>  
BE Semiconductor <sup>BESIJ.PK</sup>  
FormFactor <sup>FORM</sup> KLA <sup>KLAC</sup>  
Kulicke & Soffa <sup>KLIC</sup> Lam Research <sup>LRCX</sup>  
Onto Innovation <sup>ONTO</sup> Nikon <sup>7731</sup>  
Teradyne <sup>TER</sup> Tokyo Electron Limited <sup>8035</sup>  
Veeco <sup>VECO</sup>

Weekly Gains			6/10/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
<b>Wafer Fab:</b>			<b>Test:</b>		
Applied Materials	-11.4%	13	Advantest	-10.1%	—
ASM International	-5.3%	21	Teradyne	-9.7%	16
ASML	-7.5%	27	FormFactor	-6.4%	20
KLA	-7.9%	15			
Lam Research	-7.7%	14	<b>Assembly:</b>		
Onto Innovation	-9.1%	—	BESI	-2.3%	—
Nikon	6.0%	—	Kulicke & Soffa	-8.0%	8
TEL	-7.2%	—	ASM Pacific Technology	5.0%	
Veeco Instruments	-4.8%	11			

Above Avg

Top 4-6

Top 1-3

# Electronic Materials Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			6/10/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
<b>EDA</b>			DNP	-3.5%	—
Cadence	-6.0%	36	DuPont de Nemours	-5.1%	5
Synopsys	-6.8%	34	JSR	-0.8%	—
Ansys	-6.6%	30	Shin-Etsu	-1.7%	—
<b>Electronic Materials</b>			SOITEC	0.7%	—
BASF	-6.4%	2	Tokyo Ohka	-0.5%	—
CMC Materials	-2.3%	23			
			Above Avg	Top 4-6	Top 1-3

TechInsights' EDA Stock Index plummeted.

TechInsights' Electronic Materials Stock Index decreased, SOITEC came out on top.

Ansys, Inc. <sup>ANSS</sup>    BASF <sup>BASFY</sup>  
 CMC Materials <sup>CCMP</sup>    Cadence <sup>CDNS</sup>  
 DNP <sup>7912</sup>    DuPont <sup>DD</sup>    JSR <sup>4185</sup>  
 Shin-Etsu <sup>4063</sup>    SOITEC <sup>SOI.PA</sup>  
 Synopsys <sup>SNPS</sup>    Tokyo Ohka <sup>4186</sup>

The Prior Week's Close	TechInsights' Indices of Chip Industry Stocks				Weekly Growth				Companies Up	Max Growth	Companies Down	Min Growth	Range of Growth	S&P 500	S&P 500 Growth
	Semi Stocks	Equipment Stocks	Materials Stocks	EDA Stocks	Semi Stocks	Equipment Stocks	Materials Stocks	EDA Stocks							
05-Nov-21	94.4	95.0	98.0	94.6	6.1%	6.1%	4.6%	2.5%	45	30.5%	-8	-29.8%	60.3%	98.6	2.0%
12-Nov-21	95.9	95.5	98.7	96.4	1.5%	0.4%	0.7%	1.9%	31	8.5%	-16	-12.1%	20.6%	98.3	-0.3%
19-Nov-21	98.3	97.5	98.2	99.4	2.6%	2.1%	-0.4%	3.2%	39	12.2%	-16	-16.8%	29.0%	98.6	0.3%
26-Nov-21	97.7	96.0	95.5	96.8	-0.6%	-1.6%	-2.8%	-2.7%	16	11.8%	-39	-9.6%	21.4%	98.6	0.1%
03-Dec-21	95.9	94.5	92.9	95.0	-1.9%	-1.6%	-2.7%	-1.9%	12	6.0%	-44	-11.1%	17.1%	95.2	-3.5%
10-Dec-21	97.5	96.9	95.7	98.8	1.6%	2.6%	3.0%	4.0%	40	13.2%	-15	-7.5%	20.7%	98.9	3.8%
17-Dec-21	94.7	93.8	97.7	96.5	-2.9%	-3.2%	2.1%	-2.3%	12	25.6%	-43	-15.6%	41.2%	96.9	-1.9%
24-Dec-21	98.6	97.7	99.3	100.2	4.1%	4.2%	1.7%	3.8%	50	13.8%	-6	-2.8%	16.6%	99.2	2.3%
31-Dec-21	100.0	100.0	100.0	100.0	1.5%	2.3%	0.7%	-0.2%	44	8.1%	-11	-2.7%	10.8%	100.0	0.9%
07-Jan-22	96.6	96.3	99.4	89.7	-3.4%	-3.7%	-0.6%	-10.3%	10	7.4%	-45	-17.5%	24.9%	98.1	-1.9%
14-Jan-22	98.5	102.0	99.3	87.4	2.0%	5.9%	-0.1%	-2.5%	36	23.7%	-20	-4.9%	28.6%	97.8	-0.3%
21-Jan-22	90.1	90.4	93.8	81.0	-8.5%	-11.4%	-5.6%	-7.3%	3	5.1%	-53	-20.3%	25.4%	92.3	-5.7%
28-Jan-22	87.1	84.5	92.4	79.7	-3.4%	-6.6%	-1.5%	-1.7%	11	5.0%	-45	-21.8%	26.8%	93.0	0.8%
04-Feb-22	90.2	87.3	92.3	81.5	3.5%	3.3%	-0.1%	2.3%	41	17.5%	-13	-4.3%	21.8%	94.4	1.6%
11-Feb-22	89.6	86.1	93.2	78.7	-0.7%	-1.4%	1.0%	-3.4%	20	10.6%	-33	-8.9%	19.5%	92.7	-1.8%
18-Feb-22	90.1	86.8	93.0	75.0	0.6%	0.8%	-0.2%	-4.7%	28	12.2%	-26	-7.0%	19.2%	91.2	-1.6%
25-Feb-22	90.1	87.5	91.9	82.5	0.0%	0.8%	-1.3%	9.9%	30	14.7%	-25	-9.5%	24.2%	92.0	0.8%
04-Mar-22	85.3	81.4	86.8	81.5	-5.3%	-6.9%	-5.5%	-1.2%	7	6.4%	-48	-18.6%	25.0%	90.8	-1.3%
11-Mar-22	82.1	79.7	87.1	76.9	-3.7%	-2.2%	0.3%	-5.7%	9	9.7%	-45	-11.1%	20.8%	88.2	-2.9%
18-Mar-22	87.9	90.3	92.7	83.7	7.1%	13.3%	6.5%	8.8%	53	31.3%	-2	-5.9%	37.2%	93.6	6.2%
25-Mar-22	89.1	91.8	94.0	82.9	1.3%	1.7%	1.3%	-0.9%	36	9.2%	-16	-5.5%	14.7%	95.3	1.8%
01-Apr-22	85.4	87.8	91.5	86.1	-4.2%	-4.3%	-2.6%	3.9%	5	5.0%	-50	-23.1%	28.1%	95.4	0.1%
08-Apr-22	80.1	81.9	87.1	82.3	-6.2%	-6.8%	-4.8%	-4.4%	2	5.5%	-53	-17.6%	23.1%	94.2	-1.3%
15-Apr-22	78.1	79.2	86.4	76.9	-2.5%	-3.3%	-0.9%	-6.6%	6	4.2%	-49	-10.9%	15.1%	92.2	-2.1%
22-Apr-22	77.8	80.5	87.4	75.2	-0.3%	1.6%	1.3%	-2.2%	30	9.3%	-25	-18.8%	28.1%	89.6	-2.8%
29-Apr-22	77.8	78.2	88.2	75.7	0.0%	-2.9%	0.9%	0.7%	22	21.1%	-32	-14.9%	36.0%	86.7	-3.3%
06-May-22	78.6	78.3	87.3	72.6	0.9%	0.1%	-1.0%	-4.1%	30	12.0%	-25	-11.7%	23.7%	86.5	-0.2%
13-May-22	79.0	78.1	87.5	71.4	0.5%	-0.1%	0.2%	-1.6%	28	8.2%	-25	-10.0%	18.2%	84.4	-2.4%
20-May-22	78.6	77.3	88.3	74.5	-0.5%	-1.1%	1.0%	4.3%	22	17.9%	-30	-7.7%	25.6%	81.9	-3.0%
27-May-22	82.3	81.9	90.9	78.7	4.8%	6.0%	2.9%	5.6%	48	30.3%	-7	-7.8%	38.1%	87.2	6.6%
03-Jun-22	82.1	82.0	92.6	78.9	-0.3%	0.1%	1.9%	0.3%	29	7.7%	-26	-4.6%	12.3%	86.2	-1.2%
10-Jun-22	77.8	77.3	90.3	73.8	-5.2%	-5.7%	-2.5%	-6.5%	6	9.7%	-49	-11.9%	21.6%	81.8	-5.1%

# Links to Conference Call Transcripts

**June 10<sup>th</sup>**

[ON Semiconductor Corporation's \(ON\) Management Presents at BofA Securities 2022 Global Technology Conference \(Transcript\)](#)

[Qualcomm, Inc. \(QCOM\) Presents at Bank of America 2022 Global Technology Conference](#)

[Western Digital Corp. \(WDC\) Presents at BofA Securities 2022 Global Technology Conference \(Transcript\)](#)

[DuPont de Nemours, Inc. \(DD\) CEO Ed Breen Presents at Deutsche Bank's 13th Annual Global Materials Conference \(Transcript\)](#)

[Intel Corporation's \(INTC\) Management Presents at Bank of America Securities Global Technology Brokers Conference \(Transcript\)](#)

**June 3<sup>rd</sup> and before**

[HP Inc's \(HPQ\) CEO Enrique Lores on Cowen 50th Annual Technology, Media & Telecom Conference \(Transcript\)](#)

[International Business Machines Corporation's \(IBM\) CEO Arvind Krishna Presents at Bernstein 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[American Superconductor Corporation \(AMSC\) CEO Daniel McGahn on Q4 2021 Results - Earnings Call Transcript](#)

[Texas Instruments Incorporated's \(TXN\) CEO Rich Templeton Presents at Bernstein 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[HP Inc.'s \(HPQ\) CEO Enrique Lores at Bernstein's 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[QUALCOMM Incorporated's \(QCOM\) CEO Cristiano Amon Presents at Bernstein 38th Annual Strategic Decisions Brokers Conference \(Transcript\)](#)

[Lam Research Corporation \(LRCX\) CEO Tim Archer Presents at Bernstein 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[Broadcom Inc. \(AVGO\) CEO Hock Tan on Q2 2022 Results and VMware Acquisition \(Transcript\)](#)

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