

Semiconductor WEEK:

August 26, 2022

An overview of results and conclusions from recent reports at TechInsights

Chip Market Research Services

It's still very warm but there are bears around

- Order activity for semiconductor equipment continued to trend lower, slipping to 83 degrees
- The IC forecast for 2022 was also lowered from 13% to 7% due to a bigger-than-expected correction in the Memory market in 2H22
- Production and Capacity Plan

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales pulled up last week to levels 14% above 2021. However, the IC weather chilled 2°F to Cool. Zooming in on Analog & Power this week, the 13-wk MA grew 20% Y/Y, cooling off this year's peak of 32% in early March. TechInsights forecasts it will reach \$111B in 2022, with Y/Y growth of 17% that slides to 0% in 2023.

TechInsights' IC Supply/Demand indices weakened last week. Foundry dropped from Balanced to Saturated, as More Moore dipped from loose to Saturated. More than Moore held at Balanced, however OSAT fell to Loose. Memory stayed in Glut conditions, IDM in Loose, Analog and Power in Balanced, while Auto ICs remain in Shortage though it has steadily loosened since April.

Chip History Center

The dawn of automated inspection: **KLA ADD/100 Series.**

The tool that sparked the yield management revolution: **The KLA 2020**

The Chip Insider

Strategy and Tactics: Chiplet Strategy. Chips Act: how long. The Transistor's 75th Anniversary. Becoming Great.

Semiconductor Manufacturing Markets: Foundry & IDM Capital Expenditures

Semiconductor Stocks

- *TechInsights' Semiconductor Stock Indices all plunged this week along with the market*
- *Semiconductor Stock Index plunged*
- *Semiconductor Equipment Stock Index sunk*
 - *Veeco Instruments came out on top*
- *EDA Stock Index plunged*
- *Electronics Materials Stock Index fell*
 - *Tokyo Ohka was this week's biggest winner*
- *Hottest Stocks: Tokyo Ohka, Veeco Instruments, ASM Pacific Technology, JSR, Advantest, and Nikon*

TechInsights

The Chip Insider[®]'s Graphics File

August 2022



*It's still very warm but there are
bears around*



This issue contains the latest forecast.

- Order activity for semiconductor equipment continued to trend lower, slipping to 83 degrees
- The equipment forecast for 2022 was lowered from 13% to 10% as supply constraints continued to limit growth
- The IC forecast for 2022 was also lowered from 13% to 7% due to a bigger-than-expected correction in the Memory market in 2H22
- TechInsights' Chip Price Performance Index remains in a free-fall state, signaling more weakness ahead

Forecast as of August 2022:	2021	2022
Semi Equipment (\$B):	\$ 126.9	\$ 139.4
Sequential Change	36.9%	9.9%
Capacity Utilization:	97.2%	96.2%
ICs (\$B):	\$ 492.3	\$ 529.1
Sequential Change	27.4%	7.5%
IC Units (BU):	394.2	419.3
Sequential Change	23.7%	6.4%
Electronics (\$B) :	\$ 2,574	\$ 2,622
Sequential Change	18.9%	1.9%

TechInsights

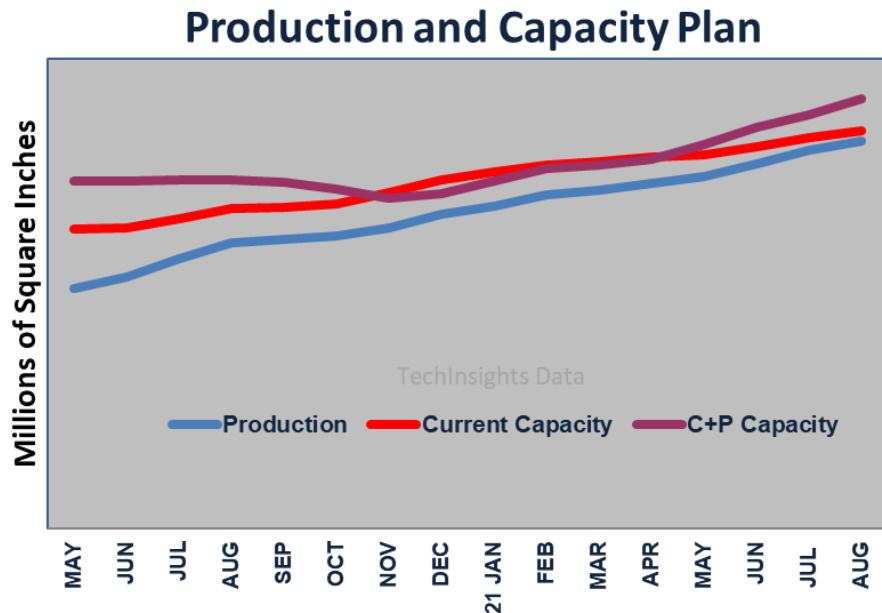
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The Chip Insider[®] Graphics

Production and Capacity Plan:

- Planned additions are on the rise

Production and Capacity Plan: chart gives rolling averages for semiconductor production, currently active capacity, and current plus planned capacity in millions of square inches of silicon wafers.



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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.

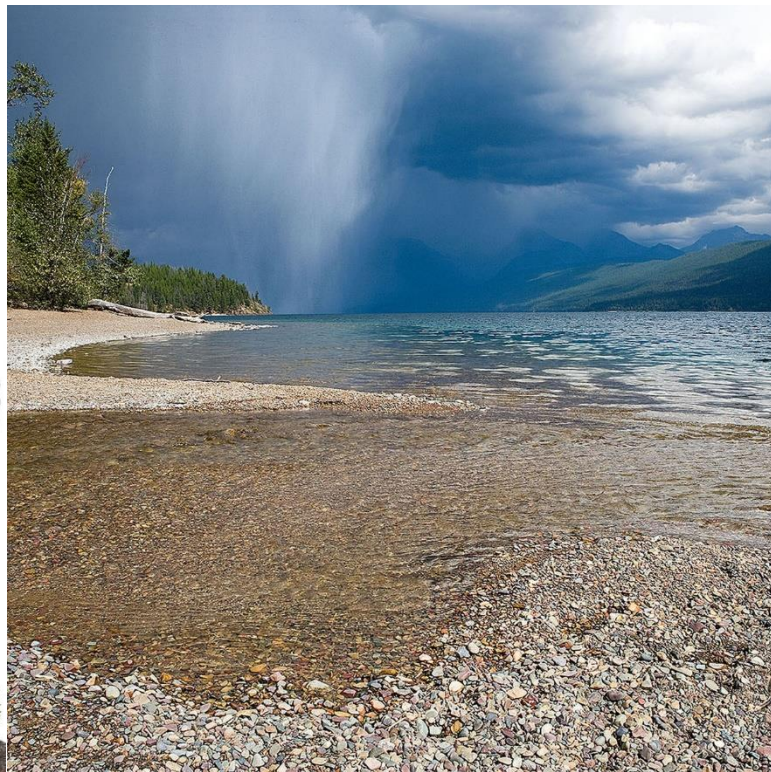
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Semiconductor Analytics

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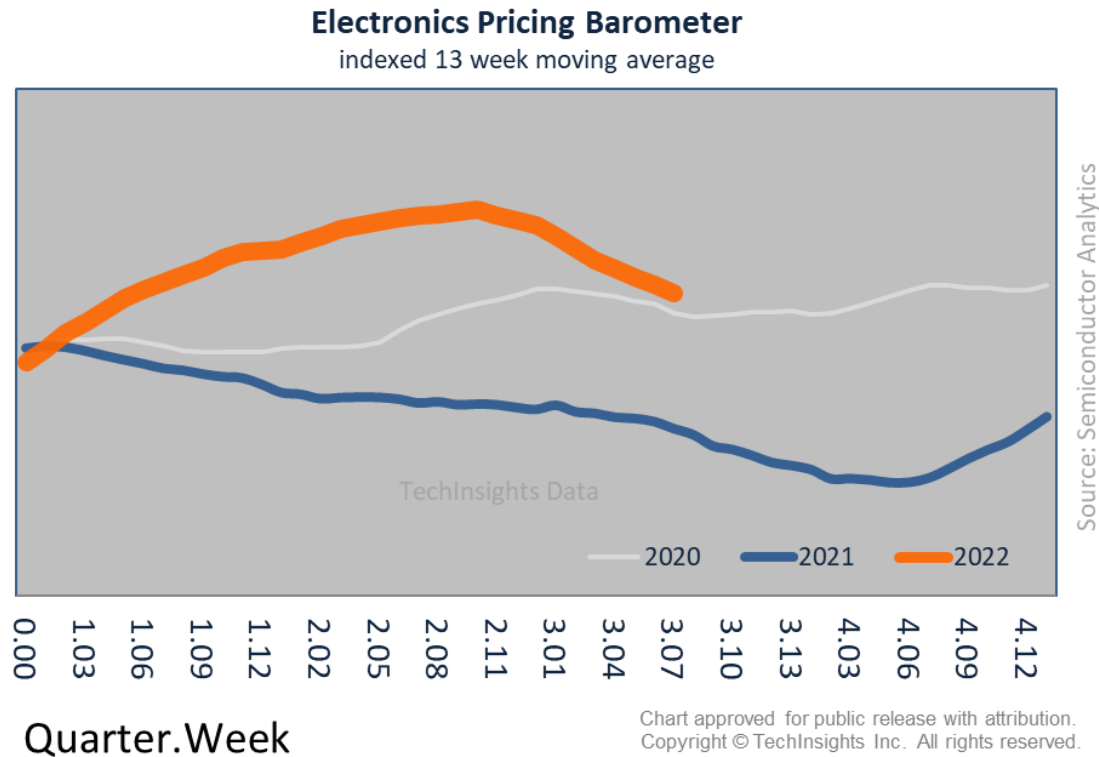


1: Measures Order Activity 2: Measures Pricing Power

Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Electronics' Retail Price decline is showing early signs of bottoming.





Strategy and Tactics: Chiplet Strategy. Chips Act: how long. The Transistor's 75th Anniversary. Becoming Great.

Summaries:

Chips and Chiplet Strategy: It is a strategic error to believe a chiplet strategy without big silicon will be competitive. Some strategic thinkers are promoting the concept that packaging multiple chiplets of mature and legacy silicon in an advanced package will offset the disadvantages the mature silicon brings against its big silicon alternatives. Note, I'm introducing the concept of 'big' silicon here to contrast it with mature silicon and avoid the word 'immature' because big silicon is anything but immature, with the exception of "risk" production wafers. I am calling it 'big' because of its big cost, big die size, big performance, while each transistor sips little power. In contrast, mature silicon delivers lower cost, smaller die size, lower performance, while each transistor drinks more power – legacy silicon can down power like it's tequila shots on a Friday night... Instead, a chiplet strategy with mature silicon is more than swapping out the 488 engine in a Ferrari Pista for a Ford flathead 4. And that's a key point: the efficient chiplet strategist is ...

The Chips Act: how long will it take? With market conditions shifting quickly from shortage to glut ... It was not about fixing short-term shortages, for which government investment could never be a solution. Instead, it was about having greater diversity of supply so that such shortages would be less likely to happen in the future. It was also ... around national security, because semiconductors are essential to leadership in this century. In the early 60s, President Kennedy said, "We choose to go to the moon in this decade and do the other things, not because they are easy, but because" ...

The Transistor's 75th Anniversary: This December will be a special month to celebrate the history of our industry... More than an anniversary, there are a lot of R&D and marketing lessons to learn from their discovery... Mervin Kelly, Bell Labs Director of Research at the time had a vision for a switch that had no moving or hot parts. ...

Becoming Great: The transistor became great because Mervin Kelly understood the problem and the solution. While Kelly's vision was following a research-and-then-develop vector, it would become great because it was a direct application of the market creation maxim of "Problems are markets and solutions are products." ... a solid-state version that brought the clear benefit of PPAC, as industry insiders now like to call it (Power, Performance, Area, and Cost)... An important lesson here is the tight linkage between R&D, markets, products, and their ultimate value to the world. Markets and products don't appear without R&D solutions to problems. Development of solutions to wants that are not needed with few benefits are a waste of resources no less than building bridges to nowhere. Leading R&D in a productive direction that creates growth is about having a grand strategy around products, markets, solutions, products, needs, and benefits while ignoring the wants and features.

"Strategy requires a sense of the whole that reveals the significance of respective parts."

– John Lewis Gaddis

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TechInsights

The Chip Insider®

Semiconductor Manufacturing Markets

Foundry & IDM Capital Expenditures

- Changes Since Last Forecast
- Company Focus
- Advanced Logic & Foundry
- DRAM & NAND
- Semiconductor Manufacturing CapEx
- TechInsights' View

WildPhotons: A person can only grow...



Company Focus

Spending is expected to decline in 2023 as supply constraints diminish and inventories enter a correction phase

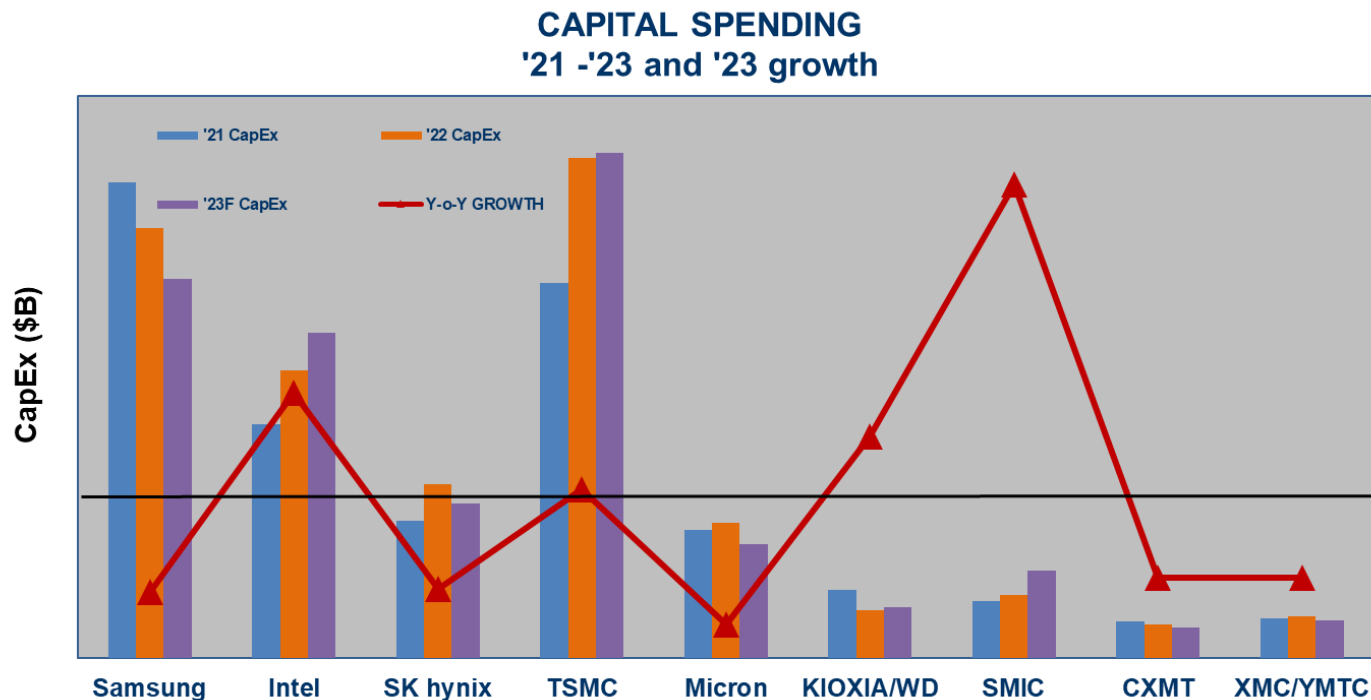


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THE CHIP HISTORY CENTER

The Virtual Museum of Semiconductors

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Semiconductors are to the information age what engines are to the industrial age. Chips are the steam engine, the internal combustion engine, and the fractional horsepower engine rolled up into one. The Chip History Center is dedicated to preserving that history for future generations.

The dawn of automated inspection: [KLA ADD/100 Series](#).

The tool that sparked the yield management revolution: [The KLA 2020](#)

#FactFriday: [Do you know what KLA stands for today and in the past?](#)



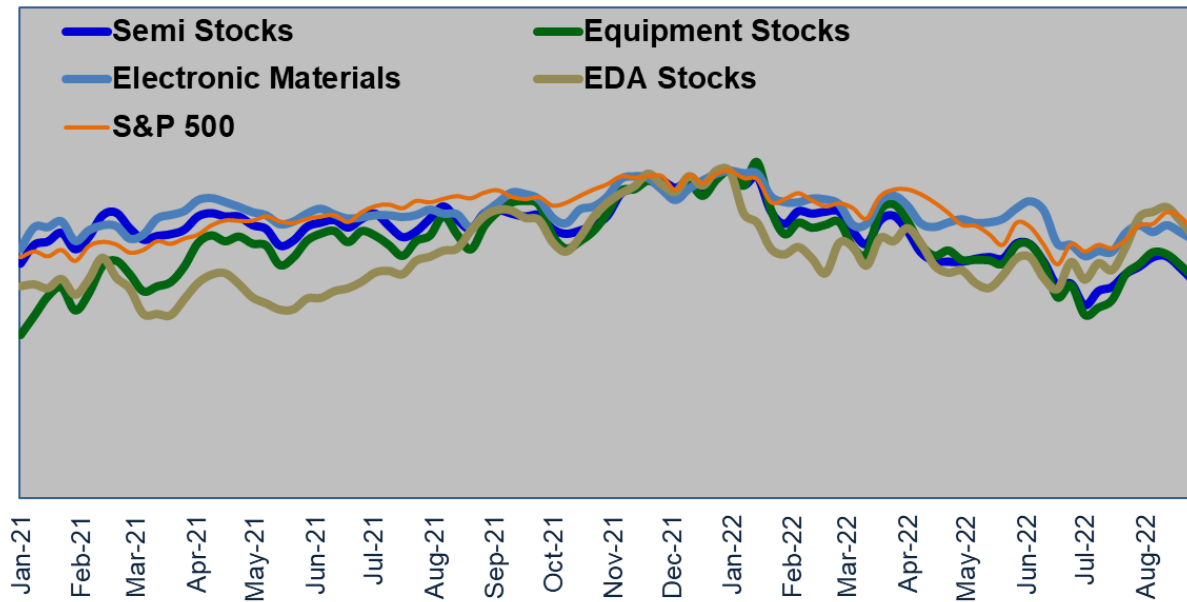
semiStockWEEK:

TechInsights' Semiconductor Stock Indices all plunged this week along with the market.



Semiconductor Industry Stock Performance Indices

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



TechInsights' Stock Indices:

Semiconductors -4.3%
Equipment -3.9%
Electronic Materials -2.3%
EDA -4.7%

Semiconductor Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			8/26/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
IDM			Fab-lite to Fabless		
Intel	-5.7%	13	AMD	-5.0%	20
Micron	-4.8%	15	Analog Devices	-5.6%	17
ON Semiconductor	-1.3%	15	Broadcom	-5.0%	14
Samsung Electronics	-1.5%	—	IBM	-5.8%	14
SK hynix	-1.3%		Infineon	-6.9%	12
STMicroelectronics	-4.8%	10	MagnaChip Semiconductor	-2.6%	16
Western Digital	-4.6%	9	MaxLinear	-2.3%	9
Foundry & OSAT			MediaTek	-2.2%	—
Amkor	-4.8%	7	NVIDIA	-8.9%	29
ASE	-4.1%	7	Panasonic	-1.1%	11
GLOBALFOUNDRIES	-0.9%	24	Qualcomm	-6.2%	11
JCET	-8.1%	15	Silicon Laboratories	-5.3%	33
SkyWater Technology	-17.8%	—	Skyworks	-5.3%	9
SMIC	-1.5%	10	Texas Instruments	-3.9%	20
TSMC	-2.8%	14			
UMC	-5.2%	7			

Above Avg

Top 4-6

Top 1-3

TechInsights' Semiconductor Stock Index plunged this week with no companies finishing in positive territory. Twelve companies finishing above the weekly average.

IDM -3.4%
Foundry & OSAT -5.7%
Fabless & Fablite -4.7%

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

Chip Equipment & Related Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			8/26/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
Wafer Fab:			Test:		
Applied Materials	-5.6%	13	Advantest	-0.5%	–
ASM International	-5.8%	22	Teradyne	-6.9%	15
ASML	-6.5%	26	FormFactor	-5.8%	19
KLA	-3.4%	16			
Lam Research	-4.9%	13	Assembly:		
Onto Innovation	-4.2%	–	BESI	-7.5%	–
Nikon	-0.7%	–	Kulicke & Soffa	-7.3%	10
TEL	-1.6%	–	ASM Pacific Technology	-0.3%	
Veeco Instruments	0.1%	12			

Above Avg

Top 4-6

Top 1-3

TechInsights' Semiconductor Equipment Stock Index sunk this week, Veeco Instruments came out on top. ASM Pacific Technology, Advantest, and Nikon claiming the top stock spots this week.

WFE -3.6%

Test -4.4%

Assembly -5.0%

Applied Materials ^{AMAT} Advantest ^{ATEYY}

ASM International ^{ASMIY}

ASM Lithography ^{ASML} ASM Pacific ^{0522.HK}

BE Semiconductor ^{BESII.PK}

FormFactor ^{FORM} KLA ^{KLAC}

Kulicke & Soffa ^{KLIC} Lam Research ^{LRCX}

Onto Innovation ^{ONTO} Nikon ⁷⁷³¹ Teradyne

^{TER} Tokyo Electron Limited ⁸⁰³⁵ Veeco

^{VECO}

Electronic Materials Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			8/26/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
EDA			DNP	-1.3%	—
Cadence	-5.4%	41	DuPont de Nemours	-4.4%	5
Synopsys	-2.2%	38	JSR	-0.3%	—
Ansys	-6.4%	32	Shin-Etsu	-1.9%	—
Electronic Materials			SOITEC	-2.9%	—
BASF	-6.4%	2	Tokyo Ohka	1.1%	—
Entegris	-2.7%	21			
			Above Avg	Top 4-6	Top 1-3

TechInsights' EDA Stock Index plunged.

TechInsights' Electronic Materials Stock Index fell this week, Tokyo Ohka was this week's biggest winner.

Ansys, Inc. ^{ANSS} BASF ^{BASFY}
 Entegris ^{ENTG} Cadence ^{CDNS} DNP ⁷⁹¹²
 DuPont ^{DD} JSR ⁴¹⁸⁵ Shin-Etsu ⁴⁰⁶³
 SOITEC ^{SOI.PA} Synopsys ^{SNPS} Tokyo Ohka ⁴¹⁸⁶

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							
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%
17-Jun-22	72.0	69.1	82.3	71.2	-7.5%	-10.6%	-8.9%	-3.6%	2	4.0%	-53	-17.3%	21.3%	77.1	-5.8%
24-Jun-22	72.5	72.1	82.0	77.8	0.8%	4.3%	-0.3%	9.3%	41	12.8%	-14	-19.4%	32.2%	82.1	6.4%
01-Jul-22	67.2	64.9	79.3	73.5	-7.3%	-10.1%	-3.3%	-5.6%	3	6.1%	-52	-20.1%	26.2%	80.3	-2.2%
08-Jul-22	70.7	66.6	80.5	77.5	5.2%	2.7%	1.5%	5.5%	47	20.5%	-7	-4.8%	25.3%	81.8	1.9%
15-Jul-22	71.7	68.5	80.3	75.8	1.4%	2.8%	-0.2%	-2.2%	32	10.1%	-21	-9.1%	19.2%	81.1	-0.9%
22-Jul-22	74.9	74.7	84.9	81.5	4.4%	9.1%	5.7%	7.5%	52	66.7%	-3	-8.3%	75.0%	83.1	2.5%
29-Jul-22	76.6	77.2	86.7	88.8	2.4%	3.3%	2.2%	9.0%	39	12.4%	-16	-9.9%	22.3%	86.7	4.3%
05-Aug-22	79.0	80.1	85.1	90.1	3.1%	3.8%	-1.9%	1.5%	47	33.8%	-8	-17.1%	50.9%	87.0	0.4%
12-Aug-22	79.2	79.6	86.8	91.2	0.3%	-0.6%	1.9%	1.3%	33	22.3%	-22	-17.4%	39.7%	89.8	3.3%
19-Aug-22	76.4	77.0	85.1	88.0	-3.6%	-3.3%	-1.9%	-3.6%	9	17.4%	-46	-8.1%	25.5%	88.7	-1.2%
26-Aug-22	73.1	74.0	83.1	83.9	-4.3%	-3.9%	-2.3%	-4.7%	2	1.1%	-53	-17.8%	18.9%	85.1	-4.0%

Links to Conference Call Transcripts

August 26th

[NVIDIA Corporation \(NVDA\) CEO Jensen Huang on Q2 2023 Results - Earnings Call Transcript](#)

August 19th and before

[Applied Materials, Inc.'s \(AMAT\) CEO Gary Dickerson on Q3 2022 Results - Earnings Call Transcript](#)

[Synopsys, Inc. \(SNPS\) CEO Aart de Geus on Q3 2022 Results - Earnings Call Transcript](#)

[Analog Devices Inc. \(ADI\) CEO Vincent Roche on Q3 2022 Results - Earnings Call Transcript](#)

[Agilent Technologies, Inc. \(A\) CEO Mike McMullen on Q3 2022 Results - Earnings Call Transcript](#)

[SkyWater Technology, Inc. \(SKYT\) CEO Thomas Sonderman on Q2 2022 Results - Earnings Call Transcript](#)

[Magnachip Semiconductor Corporation \(MX\) CEO YJ Kim on Q2 2022 Results - Earnings Call Transcript](#)

[ACM Research, Inc. \(ACMR\) CEO David Wang on Q2 2022 Results - Earnings Call Transcript](#)

[Western Digital Corporation \(WDC\) CEO David Goeckeler on Q4 2022 Results - Earnings Call Transcript](#)

[Skyworks Solutions, Inc.'s \(SWKS\) CEO Liam Griffin on Q3 2022 Results - Earnings Call Transcript](#)

[Kulicke and Soffa Industries, Inc. \(KLIC\) CEO Fusen Chen on Q3 2022 Results - Earnings Call Transcript](#)

[Infineon Technologies AG \(IFNNY\) CEO Jochen Hanebeck on Q3 2022 Results - Earnings Call Transcript](#)

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[Cirrus Logic, Inc.'s \(CRUS\) CEO John Forsyth on Q1 2023 Results - Earnings Call Transcript](#)

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[Amkor Technology, Inc. \(AMKR\) CEO Giel Rutten on Q2 2022 Results - Earnings Call Transcript](#)

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[SK Hynix, Inc.'s \(HXSCF\) Q2 2022 Results - Earnings Call Transcript](#)

[LG Electronics Inc.'s \(LGEAF\) Q2 2022 Results - Earnings Call Transcript](#)

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[ASE Technology Holding Co., Ltd. \(ASX\) Q2 2022 Results - Earnings Call Transcript](#)

[Cohu, Inc. \(COHU\) CEO Luis Müller on Q2 2022 Results - Earnings Call Transcript](#)

[KLA Corporation \(KLAC\) CEO Rick Wallace on Q4 2022 Results - Earnings Call Transcript](#)

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[Taiwan Semiconductor Manufacturing Company Limited \(TSM\) CEO C. C. Wei on Q2 2022 Results - Earnings Call Transcript](#)

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