

Semiconductor WEEK:

October 21, 2022

An overview of results and conclusions from recent reports at TechInsights

Chip Market Research Services

Bearish conditions abound

- Order activity for semiconductor equipment extended its decline, slipping to 76 degrees
- Worldwide Chip Making Equipment Markets

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales fell 7% last week, with monthly data updates taking it to 2020 levels. The IC weather cooled by 1°F, in Chilly conditions. Zooming in on forecast updates this week with Jul-Aug data in, the heat map proved more accurate than weekly data. There was a sharp turn in July, as memory fell off a cliff. Semis will reach \$637B in 2022, with Y/Y growth of 6% which drops to -3% in 2023.

TechInsights' IC Supply/Demand metrics remained Balanced for the 3rd week in a row which shows more signs of improvement. NAND crawled back to Balanced and IDM clawed its way to Loose from Saturated. However, Foundry returned to Glut after a brief stint at Saturated, as More Moore took the biggest hit. Analog & Power held at Tight for a second week.

Chip History Center

The lady bug and the microchip ... Little lil had heard that microchips had things as small as a micrometer and even as small as a handful of nanometers.

What's ALD? A children's story ... Did you know that the chip makers routinely make films one atom at a time? It's called Atomic Layer Deposition.

Bunny Suit History in Semiconductor Manufacturing In 1968, standard clean room practices were lax.

Semiconductor Stocks

- *TechInsights Semiconductor Stock Indices and the S&P 500 jumped this week*
- *Semiconductor Stock Index was led up by GLOBALFOUNDRIES*
- *Semiconductor Equipment Stock Index was led up by ASML*
 - *ASML was this week's biggest winner*
- *EDA Stock Index soared*
- *Electronics Materials Stock Index was led up by BASF*
 - *BASF came out on top*
- *Hottest Stocks: ASML, BESI, ASM International, Lam Research, GLOBALFOUNDRIES, and ON Semiconductor*

The Chip Insider[®]'s Graphics File



This issue contains the latest forecast.

October 2022

Bearish conditions abound

- Order activity for semiconductor equipment extended its decline, slipping to 76 degrees
- The 2022 IC forecast was downgraded to 5% from 7% in the previous update due to faster-than-expected deteriorating conditions in 2H22
- TechInsights' Chip Price Performance Index continued to trend lower

Forecast as of October 2022:	2022	2023
Semi Equipment (\$B):	\$ 136.9	\$ 118.2
Sequential Change	7.9%	-13.6%
Capacity Utilization:	95.4%	89.8%
ICs (\$B):	\$ 516.2	\$ 486.3
Sequential Change	4.9%	-5.8%
IC Units (BU):	412.9	405.9
Sequential Change	4.7%	-1.7%
Electronics (\$B) :	\$ 2,534	\$ 2,430
Sequential Change	-1.6%	-4.1%

[Contact us to access more details](#)

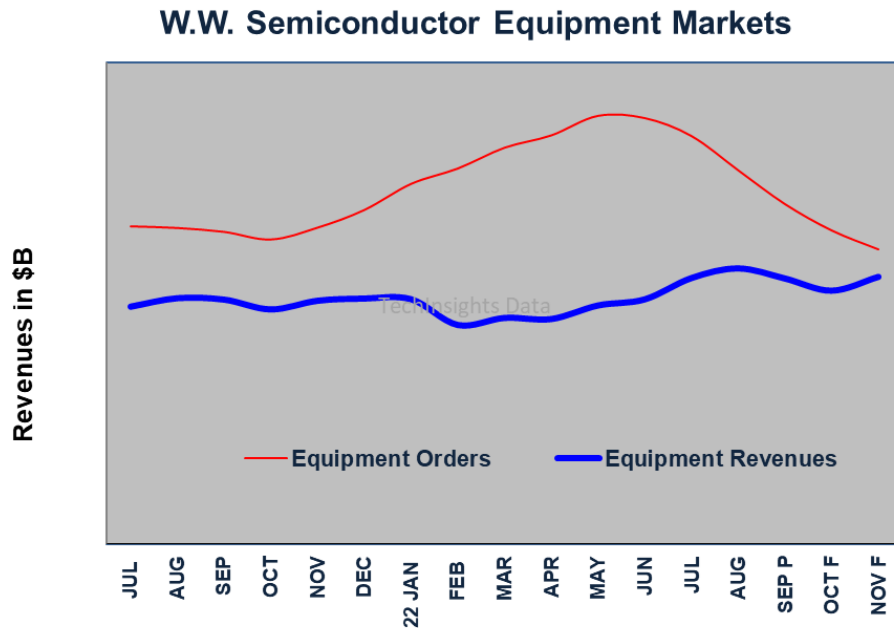
TechInsights

The Chip Insider[®] Graphics

Worldwide Chip Making Equipment Markets

- Equipment Orders are falling

Worldwide Chip Making Equipment Markets: Chart shows rolling averages in \$B for semiconductor equipment orders and revenues, contrasted against a 36-month rolling average of revenues



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2022 SIA AWARDS DINNER THURSDAY, NOVEMBER 17, 2022

SAN JOSE MARRIOTT
301 S MARKET ST, SAN JOSE, CA 95113
SIA Reception: 5-6:30 p.m.
Dinner, Awards, Keynote: 6:30-8:30 p.m.
After-Dinner Reception: 8:30-10 p.m.

NOYCE AWARD RECIPIENT

LIP-BU TAN

Executive Chairman and Former CEO
Cadence Design Systems,
Inc. Founder and Chairman
Walden International
Founding Managing Partner
Walden Catalyst Ventures



KEYNOTE SPEAKER

JIM FARLEY

President and CEO
of Ford Motor
Company



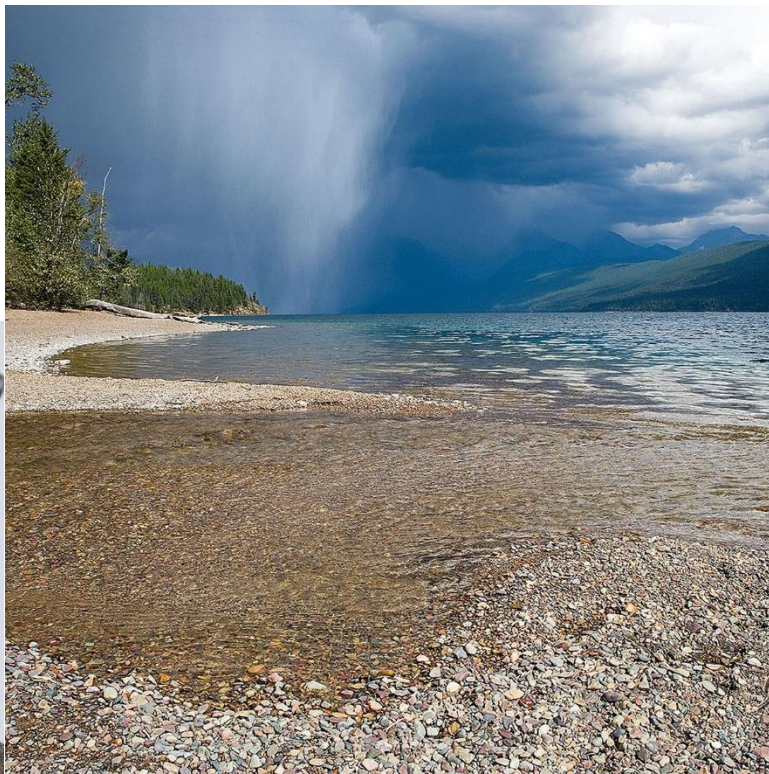
For more information about tickets and
sponsorship opportunities please contact
Sarah Ravi at sravi@semiconductors.org

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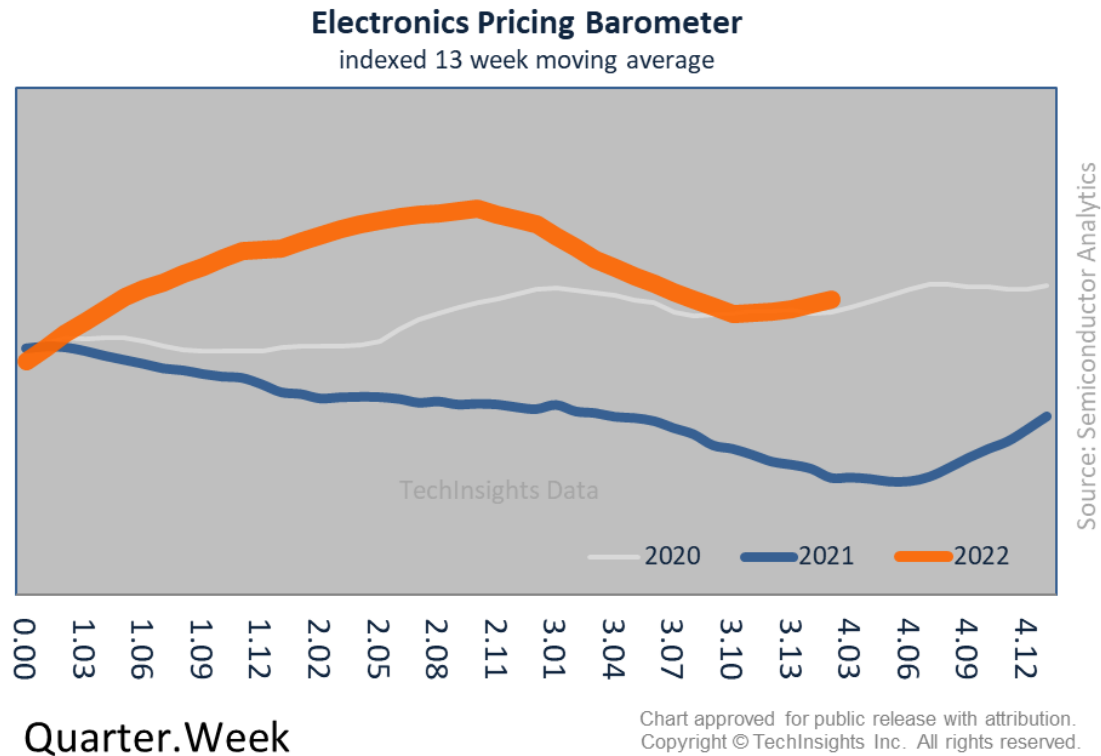


IC Weather Measures Order Activity S/D Measures Pricing Power

Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Electronics' Retail Price
Down Trend has
bottomed.



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.

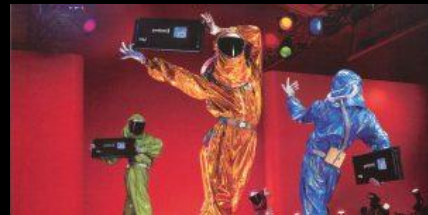
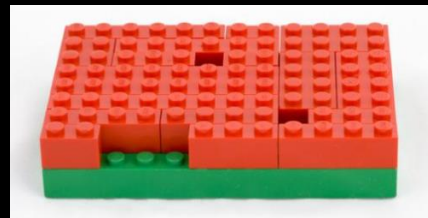
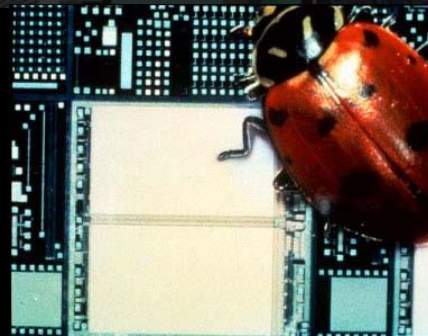
[Click here to watch online](#)



The lady bug and the microchip ... Little lil had heard that microchips had things as small as a micrometer and even as small as a handful of nanometers ... A children's story about microns and nanometers that traces Little Lil the ladybug and her journey across a silicon wafer and down into a semiconductor integrated circuit. It was created to help kids get a visual sense out of what micrometers and nanometers are compared to the things they encounter everyday.

What's ALD? A children's story ... Did you know that the chip makers routinely make films one atom at a time? It's called Atomic Layer Deposition. It sounds very complicated, but this story makes it so simple even a child could understand.

Bunny Suit History in Semiconductor Manufacturing In 1968, standard clean room practices were lax. Facilities were kept reasonably clean, but employees wore their own clothes and the environment was not sterile. An early technician remembered "a couple of people.... bringing pizzas in and setting them on top of the diffusion furnaces to keep them warm." Eventually bunny suits that sealed particles in would be required to maintain semiconductor yields. Here's a history of that evolution from Intel



semiStockWEEK:

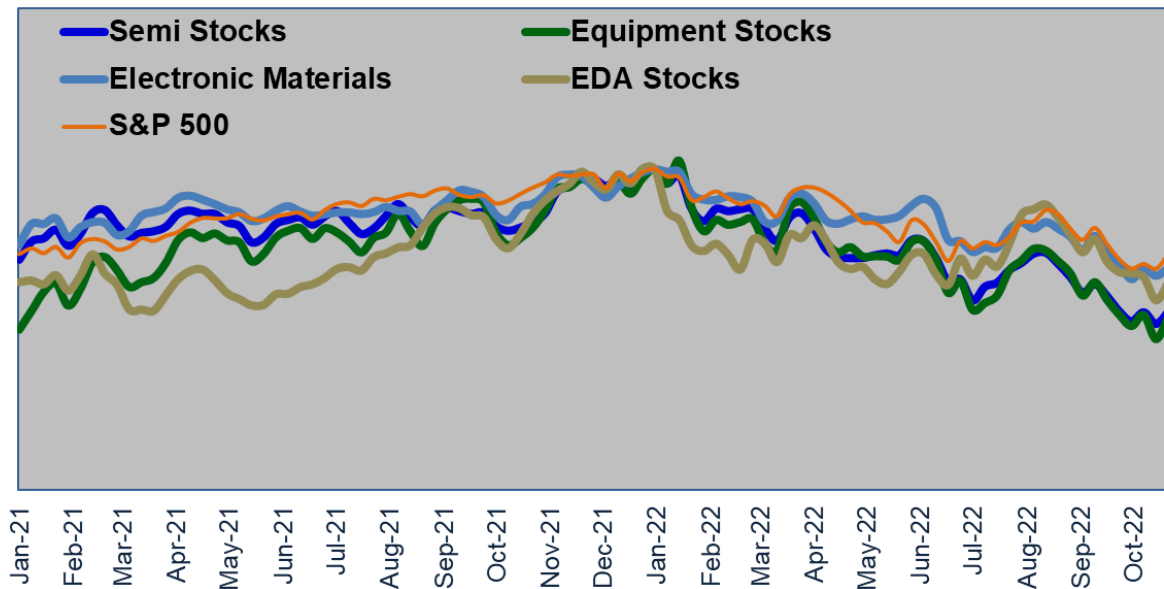
TechInsights' Semiconductor Stock Indices and the S&P 500

jumped this week as investors believe it's possible the Federal Reserve officials may ease aggressive rate increases sooner than anticipated.



Semiconductor Industry Stock Performance Indices

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



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TechInsights' Stock Indices:

Semiconductors +4.9%

Equipment +9.6%

Electronic Materials +2.8%

EDA +6.5%

Semiconductor Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			10/21/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
IDM			Fab-lite to Fabless		
Intel	4.1%	11	AMD	5.1%	14
Micron	6.3%	13	Analog Devices	7.2%	14
ON Semiconductor	13.7%	12	Broadcom	5.3%	11
Samsung Electronics	-0.7%	—	IBM	8.1%	12
SK hynix	-5.2%		Infineon	9.2%	11
STMicroelectronics	8.8%	8	MagnaChip Semiconductor	-4.1%	13
Western Digital	3.4%	6	MaxLinear	4.6%	7
Foundry & OSAT			MediaTek	-3.1%	—
Amkor	12.5%	5	NVIDIA	11.0%	26
ASE	5.4%	5	Panasonic	1.9%	10
GLOBALFOUNDRIES	15.1%	20	Qualcomm	5.3%	9
JCET	2.2%	12	Silicon Laboratories	9.0%	24
SkyWater Technology	13.5%	—	Skyworks	4.3%	7
SMIC	4.3%	10	Texas Instruments	7.7%	17
TSMC	-0.2%	13			
UMC	7.2%	6			

Above Avg

Top 4-6

Top 1-3

TechInsights' Semiconductor Stock Index was led up by GLOBALFOUNDRIES who was awarded \$30 million in federal funding to advance the development and production at GLOBALFOUNDRIES Vermont facility. ON Semiconductor also being a top performer this week .

IDM +4.3%
Foundry & OSAT +7.5%
Fabless & Fablite +5.1%

AMD^{AMD} Analog Devices^{ADI} Amkor^{AMKR} ASE^{ASE}
ASX^{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

TechInsights' Semiconductor Equipment Stock Index was led up by ASML who was this week's biggest winner. BESI, ASM International, and Lam Research also claiming the top stock spots this week as quarterly earning reports release.

WFE +11.1%

Test +5.5%

Assembly +8.3%

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

Weekly Gains			10/21/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
Wafer Fab:			Test:		
Applied Materials	10.2%	10	Advantest	1.4%	—
ASM International	18.5%	17	Teradyne	8.3%	14
ASML	21.9%	19	FormFactor	6.7%	14
KLA	10.2%	12			
Lam Research	17.3%	10	Assembly:		
Onto Innovation	7.2%	—	BESI	18.7%	—
Nikon	1.7%	—	Kulicke & Soffa	7.6%	9
TEL	4.7%	—	ASM Pacific Technology	-1.4%	
Veeco Instruments	7.8%	10			

Above Avg

Top 4-6

Top 1-3

Electronic Materials Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			10/21/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
EDA			DNP	-0.4%	—
Cadence	7.4%	32	DuPont de Nemours	6.5%	5
Synopsys	6.8%	28	JSR	-0.3%	—
Ansys	5.4%	24	Shin-Etsu	-2.0%	—
Electronic Materials			SOITEC	4.5%	—
BASF	9.5%	2	Tokyo Ohka	-0.5%	—
Entegris	4.7%	16			
			Above Avg	Top 4-6	Top 1-3

TechInsights' EDA Stock Index soared.

TechInsights' Electronic Materials Stock Index rose this week, BASF and DuPont de Nemours came out on top.

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							
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%
02-Sep-22	69.2	68.4	79.6	79.4	-5.4%	-7.5%	-4.1%	-5.4%	1	2.1%	-54	-16.1%	18.2%	82.3	-3.3%
09-Sep-22	71.4	71.8	83.3	82.7	3.2%	4.9%	4.6%	4.2%	50	13.1%	-5	-9.5%	22.6%	85.3	3.6%
16-Sep-22	68.3	67.3	78.8	77.0	-4.3%	-6.2%	-5.4%	-6.9%	4	2.3%	-50	-24.2%	26.5%	81.3	-4.8%
23-Sep-22	64.5	63.7	76.0	74.4	-5.5%	-5.5%	-3.5%	-3.4%	3	1.6%	-52	-15.8%	17.4%	77.5	-4.6%
30-Sep-22	62.0	60.8	72.5	74.1	-3.9%	-4.4%	-4.7%	-0.4%	5	4.7%	-49	-11.7%	16.4%	75.2	-2.9%
07-Oct-22	64.3	63.6	75.3	73.2	3.7%	4.6%	3.9%	-1.3%	46	9.8%	-7	-7.8%	17.6%	76.4	1.5%
14-Oct-22	61.4	57.6	73.3	67.4	-4.6%	-9.5%	-2.6%	-7.9%	8	5.8%	-47	-16.1%	21.9%	75.2	-1.6%
21-Oct-22	64.4	63.1	75.3	71.8	4.9%	9.6%	2.8%	6.5%	45	21.9%	-10	-5.2%	27.1%	78.7	4.7%

Links to Conference Call Transcripts

October 21st

[BE Semiconductor Industries N.V. \(BESIX\) Q3 2022 Earnings Call Transcript](#)

[Lam Research Corporation \(LRCX\) Q1 2023 Earnings Call Transcript](#)

October 14th and before

[Taiwan Semiconductor Manufacturing Company Limited \(TSM\) Q3 2022 Earnings Call Transcript](#)

[Aehr Test Systems \(AEHR\) Q1 2023 Earnings Call Transcript](#)

[Micron Technology, Inc. \(MU\) Q4 2022 Earnings Call Transcript](#)

[Analog Devices Inc. \(ADI\) 13th Annual U.S. All Stars Conference \(Transcript\)](#)

[Advanced Micro Devices, Inc. \(AMD\) Goldman Sachs Communacopia + Technology Conference \(Transcript\)](#)

[QUALCOMM Incorporated \(QCOM\) Goldman Sachs 2022 Communacopia + Technology Conference \(Transcript\)](#)

[NVIDIA Corporation \(NVDA\) Presents at Goldman Sachs 2022 Communacopia + Technology Conference \(Transcript\)](#)

[NXP Semiconductors N.V. \(NXPI\) Goldman Sachs 2022 Communacopia + Technology Conference \(Transcript\)](#)

[Western Digital Corporation \(WDC\) Goldman Sachs Communacopia + Technology Conference Transcript](#)

[Applied Materials, Inc. \(AMAT\) Presents at Goldman Sachs Communacopia + Technology Conference \(Transcript\)](#)

[Western Digital Corporation \(WDC\) Presents at Evercore ISI 2nd Annual TMT Conference \(Transcript\)](#)

[ON Semiconductor Corporation \(ON\) Presents at Citi 2022 Global Technology Conference \(Transcript\)](#)

Links to Conference Call Transcripts

[ASML Holding NV \(ASML\) Citi 2022 Global Technology Conference \(Transcript\)](#)

[International Business Machines Corporation \(IBM\) Evercore ISI 2nd Annual Technology, Media & Telcom Conference 2022 Call Transcript](#)

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[Texas Instruments \(TXN\) Presents at Citigroup 2022 Global Technology Conference - Conference Call Transcript](#)

[Broadcom Inc. \(AVGO\) Q3 2022 Earnings Call Transcript](#)

[Micron Technology, Inc. \(MU\) Presents at Deutsche Bank 2022 Technology Conference \(Transcript\)](#)

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

[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](#)

Links to Conference Call Transcripts

[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 Advanced Energy](#)

[Industries, Inc. \(AEIS\) CEO Stephen Kelley on Q2 2022 Results - Earnings Call Transcript](#)

[Qorvo, Inc.'s \(QRVO\) CEO Bob Bruggeworth on Q1 2023 Results - Earnings Call Transcript](#)

[Microchip Technology Incorporated's \(MCHP\) CEO Ganesh Moorthy on Q1 2023 Results - Earnings Call Transcript](#)

[Advanced Micro Devices, Inc.'s \(AMD\) CEO Lisa Su on Q2 2022 Results - Earnings Call Transcript](#)

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

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

[ON Semiconductor Corporation's \(ON\) CEO Hassane El-Khoury on Q2 2022 Results - Earnings Call Transcript](#)

[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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- Electronics & Macroeconomy – V22.10
- Diffusion Rates and Utilization – V22.10
- Long-Term Semi and Eqpt Forecast – V22.09
- Silicon Demand – V22.09
- CapEx Distribution – V22.09
- Semiconductor Forecast – V22.09
- Advanced Packaging – V22.07
- Packaging Demand – V22.06

Equipment Database Module:

- IC Equipment Forecast:
 - Yearly – V22.08
- WFE Equipment Market Shares:
 - Yearly – V22.05
 - Quarterly – V22.09
- Scanner & Stepper Shipments – V22.09
- WFE by Applications – V22.09

Customer Satisfaction Survey Uploads:

- [2022 CSS Databases](#)
- 2022 Survey Documents

Critical Subsystems Uploads:

- Critical Subsystems Forecasts – V22.05
- Device Forecast Summary – V22.05
- Manufacturing Equipment Forecasts – V22.05
- Substrate Processing Equipment Shipments – V22.05
- Substrate Processing Equipment Installed Base – V22.05
- Chamber Shipments – V22.05
- Supplier Shares – V22.03

Test Connectivity Reports:

- Test and Burn-In Socket Report : V21.04
- Probe Card Report: V21.04
- Device Interface Board Report: V20.05

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