

## Global Semiconductor Equipment: Markets, Market Shares, Market Forecasts

### Table Of Contents

<b>Chapter 1</b>	<b>Introduction</b>	<b>1-1</b>
<b>Chapter 2</b>	<b>Semiconductor Industry Driving Forces</b>	<b>2-1</b>
2.1	Introduction	2-1
2.2	Foundries	2-2
2.2.1	Foundry Capex Trends	2-2
2.2.2	Foundry Revenue Growth	2-4
2.2.3	Foundry Market Share	2-6
2.2.4	Revenue Growth by Foundry	2-7
2.2.5	Global Foundry / Logic Lithography Demand	2-8
2.2.6	Global Foundry Equipment Demand By Type	2-8
2.2.7	TSMC Wafer Price By Node	2-8
2.2.8	Foundry Technology Linewidth Roadmap	2-15
2.2.9	Capacity trend by linewidth	2-15
2.2.10	Capacity ratio by region	2-15
2.3	DRAM	2-20
2.3.1	Present and Future Capacity of DRAM by Manufacturer	2-20
2.3.2	DRAM Revenue Demand Forecast By Application	2-20
2.3.3	DRAM Market Shares	2-24
2.3.4	DRAM Capex	2-25
2.4	NAND	2-27
2.4.1	NAND Revenue Demand Forecast By Applications	2-27
2.4.2	NAND Market Shares	2-31

2.4.3	3D NAND Capacity	2-31
2.5	China	2-35
2.5.1	China's Semiconductor Infrastructure	2-35
2.5.2	China's Semiconductor Market	2-36
2.5.3	China's IC Production	2-37
2.5.4	China's IC Consumption	2-41
2.5.5	China's IC Production/Consumption Ratio	2-41
2.5.6	China's IC Import Requirements	2-41
2.5.7	China's IC Supply/Demand	2-41
2.5.8	China's IC Fab Capacity	2-46
2.5.9	China's IC Fab Capacity by Region	2-46
2.5.10	China's 8- And 12-Inch Fabs and Foundries	2-46
2.5.11	China's IC Fab Capacity by Wafer Size	2-46
2.5.12	China's IC Fab Capacity by Geometry	2-46
2.5.13	China's IC Production by Type	2-53
<b>Chapter 3</b>	<b>Market Business Sectors Shares and Forecast</b>	<b>3-1</b>
3.1	AMHS Market Shares and Forecast	3-1
3.2	CMP Market Shares and Forecast	3-4
3.3	Clean Market Shares and Forecast	3-7
3.3.1	Plasma Strip	3-8
3.3.2	Spray Processors	3-11
3.3.3	Wet Stations	3-14
3.4	Deposition Market Shares and Forecast	3-17
3.4.1	ALD	3-18
3.4.2	Epitaxy	3-21
3.4.3	MOCVD	3-24

3.4.4	LPCVD (non-tube)	3-27
3.4.5	LPCVD (tube)	3-30
3.4.6	PECVD	3-33
3.4.7	PVD	3-36
3.5	Ion Implantation Market Shares and Forecast	3-39
3.6	Lithography Market Shares and Forecast	3-42
3.6.1	Direct-Write E-Beam Lithography	3-43
3.6.2	Mask-Making Lithography	3-46
3.6.3	Steppers	3-49
3.7	Oxidation/Diffusion Market Shares and Forecast	3-52
3.8	Photoresist Processing (Track) Market Shares and Forecast	3-55
3.9	RTP Market Shares and Forecast	3-58
3.10	Plasma Etch Market Shares and Forecast	3-61
3.10.1	Dielectric	3-62
3.10.2	Conductor	3-65
3.11	Process Control Market Shares and Forecast	3-68
3.11.1	Lithography Metrology	3-69
3.11.2	Thin-Film Metrology	3-72
3.11.3	Wafer Inspection and Defect Review	3-75
<b>Chapter 4</b>	<b>U.S. Semiconductor Equipment Suppliers - Profiles</b>	<b>4-1</b>
4.1	Applied Materials	4-1
4.1.1	Business Sectors Covered In The Market Analysis Chapter	4-1
4.1.2	Company Profile	4-2
4.1.3	Company Financials	4-12
4.2	Axcelis Technologies	4-13
4.1.2	Business Sectors Covered In The Market Analysis Chapter	4-13

4.2.2	Company Profile	4-13
4.2.3	Company Financials	4-16
4.3	KLA	4-17
4.3.1	Business Sectors Covered In The Market Analysis Chapter	4-17
4.3.2	Company Profile	4-17
4.3.3	Company Financials	4-19
4.4	Lam Research	4-20
4.4.1	Business Sectors Covered In The Market Analysis Chapter	4-20
4.4.2	Company Profile	4-20
4.4.3	Company Financials	4-27
4.5	Mattson Technology	4-28
4.5.1	Business Sectors Covered In The Market Analysis Chapter	4-28
4.5.2	Company Profile	4-28
4.5.3	Company Financials	4-30
4.6	Opto Innovation	4-31
4.6.1	Business Sectors Covered In The Market Analysis Chapter	4-31
4.6.2	Company Profile - Nanometrics	4-31
4.6.3	Sectors Covered In The Market Analysis Chapter	4-35
4.6.4	Company Profile – Rudolph Technologies	4-35
4.6.5	Company Financials	4-38
4.7	Veeco	4-39
4.7.1	Business Sectors Covered In The Market Analysis Chapter	4-39
4.7.2	Company Profile	4-39
4.7.3	Company Financials	4-42
<b>Chapter 5</b>	<b>European Semiconductor Equipment Suppliers - Profiles</b>	<b>5-1</b>
5.1	Aixtron	5-1

5.1.1	Business Sectors Covered In The Market Analysis Chapter	5-1
5.1.2	Company Profile	5-1
5.1.3	Company Financials	5-3
5.2	ASM International	5-4
5.2.1	Business Sectors Covered In The Market Analysis Chapter	5-4
5.2.2	Company Profile	5-4
5.2.3	Company Financials	5-7
5.3	ASML	5-8
5.3.1	Business Sectors Covered In The Market Analysis Chapter	5-8
5.3.2	Company Profile	5-8
5.3.3	Company Financials	5-12
5.4	Carl Zeiss	5-13
5.4.1	Business Sectors Covered In The Market Analysis Chapter	5-13
5.4.2	Company Profile	5-13
5.4.3	Company Financials	5-15
5.5	Camtek	5-16
5.5.1	Business Sectors Covered In The Market Analysis Chapter	5-16
5.5.2	Company Profile	5-16
5.5.3	Company Financials	5-18
5.6	EV Group	5-19
5.6.1	Business Sectors Covered In The Market Analysis Chapter	5-19
5.6.2	Company Profile	5-19
5.6.3	Company Financials	5-21
5.7	LPE	5-22
5.7.1	Business Sectors Covered In The Market Analysis Chapter	5-22
5.7.2	Company Profile	5-22
5.7.3	Company Financials	5-22
5.8	Mycronic	5-23

5.8.1	Business Sectors Covered In The Market Analysis Chapter	5-23
5.8.2	Company Profile	5-23
5.8.3	Company Financials	5-24
5.9	Nova Measuring Instruments <sup>9</sup>	5-25
5.9.1	Business Sectors Covered In The Market Analysis Chapter	5-25
5.9.2	Company Profile	5-25
5.9.3	Company Financials	5-29
5.10	Oerlikon / Evatec	5-30
5.10.1	Business Sectors Covered In The Market Analysis Chapter	5-30
5.10.2	Company Profile	5-30
5.10.3	Company Financials	5-31
5.11	Semilab	5-32
5.11.1	Business Sectors Covered In The Market Analysis Chapter	5-32
5.11.2	Company Profile	5-32
5.11.3	Company Financials	5-33
<b>Chapter 6</b>	<b>Asian Semiconductor Equipment Suppliers - Profiles</b>	<b>6-1</b>
6.1	ACM Research	6-1
6.1.1	Business Sectors Covered In The Market Analysis Chapter	6-1
6.1.2	Company Profile	6-1
6.1.3	Company Financials	6-3
6.2	Advantest	6-4
6.2.1	Business Sectors Covered In The Market Analysis Chapter	6-4
6.2.2	Company Profile	6-4
6.2.3	Company Financials	6-5
6.3	AMEC	6-8
6.3.1	Business Sectors Covered In The Market Analysis Chapter	6-8

6.3.2	Company Profile	6-8
6.3.3	Company Financials	6-9
6.4	Avaco	6-10
6.4.1	Business Sectors Covered In The Market Analysis Chapter	6-10
6.4.2	Company Profile	6-10
6.4.3	Company Financials	6-11
6.5	Canon	6-12
6.5.1	Business Sectors Covered In The Market Analysis Chapter	6-12
6.5.2	Company Profile	6-12
6.5.3	Company Financials	6-14
6.5.6	Canon Anelva	6-16
6.6.1	Business Sectors Covered In The Market Analysis Chapter	6-16
6.6.2	Company Profile	6-16
6.6.3	Company Financials	6-17
6.7	Daifuku	6-18
6.7.1	Business Sectors Covered In The Market Analysis Chapter	6-18
6.7.2	Company Profile	6-18
6.7.3	Company Financials	6-19
6.8	Ebara	6-20
6.8.1	Business Sectors Covered In The Market Analysis Chapter	6-20
6.8.2	Company Profile	6-20
6.8.3	Company Financials	6-22
6.9	Eugene Technology	6-24
6.9.1	Business Sectors Covered In The Market Analysis Chapter	6-24
6.9.2	Company Profile	6-24
6.9.3	Company Financials	6-25
6.10	Hitachi High-Technologies	6-26
6.10.1	Business Sectors Covered In The Market Analysis Chapter	6-26

6.10.2	Company Profile	6-26
6.1.3	Company Financials	6-28
6.10	Hitachi Kokusai Electric	6-29
6.11.1	Business Sectors Covered In The Market Analysis Chapter	6-29
6.11.2	Company Profile	6-29
6.11.3	Company Financials	6-30
6.12	Hwatsing	6-31
6.12.1	Business Sectors Covered In The Market Analysis Chapter	6-31
6.12.2	Company Profile	6-31
6.12.3	Company Financials	6-31
6.13	JEOL	6-32
6.13.1	Business Sectors Covered In The Market Analysis Chapter	6-32
6.13.2	Company Profile	6-32
6.13.3	Company Financials	6-33
6.14	Jusung Engineering	6-33
6.14.1	Business Sectors Covered In The Market Analysis Chapter	6-34
6.14.2	Company Profile	6-34
6.14.3	Company Financials	6-35
6.15	KC Tech	6-36
6.15.1	Business Sectors Covered In The Market Analysis Chapter	6-36
6.15.2	Company Profile	6-36
6.15.3	Company Financials	6-37
6.16	Lasertec	6-38
6.16.1	Business Sectors Covered In The Market Analysis Chapter	6-38
6.16.2	Company Profile	6-38
6.16.3	Company Financials	6-39
6.17	Murata Machinery	6-40
6.17.1	Business Sectors Covered In The Market Analysis Chapter	6-40



6.17.2	Company Profile	6-40
6.17.3	Company Financials	6-41
6.18	Murata Machinery	6-42
6.18.1	Business Sectors Covered In The Market Analysis Chapter	6-42
6.18.2	Company Profile	6-42
6.18.3	Company Financials	6-44
6.19	Nikon	6-45
6.19.1	Business Sectors Covered In The Market Analysis Chapter	6-45
6.19.2	Company Profile	6-45
6.19.3	Company Financials	6-46
6.20	Nippon Sanso	6-48
6.20.1	Business Sectors Covered In The Market Analysis Chapter	6-48
6.20.2	Company Profile	6-48
6.20.3	Company Financials	6-49
6.21	Nissin Ion Equipment	6-50
6.21.1	Business Sectors Covered In The Market Analysis Chapter	6-50
6.21.2	Company Profile	6-50
6.21.3	Company Financials	6-50
6.22	NuFlare Technology	6-51
6.22.1	Business Sectors Covered In The Market Analysis Chapter	6-51
6.22.2	Company Profile	6-51
6.22.3	Company Financials	6-52
6.23	Piotech	6-53
6.23.1	Business Sectors Covered In The Market Analysis Chapter	6-53
6.23.2	Company Profile	6-53
6.23.3	Company Financials	6-53
6.24	PSK	6-54
6.24.1	Business Sectors Covered In The Market Analysis Chapter	6-54

6.24.2	Company Profile	6-54
6.24.3	Company Financials	6-55
6.25	Raintree Scientific Instruments	6-56
6.25.1	Business Sectors Covered In The Market Analysis Chapter	6-56
6.25.2	Company Profile	6-56
6.25.3	Company Financials	6-57
6.26	Screen Semiconductor Solutions	6-58
6.26.1	Business Sectors Covered In The Market Analysis Chapter	6-58
6.26.2	Company Profile	6-58
6.26.3	Company Financials	6-60
6.27	SEMES	6-61
6.27.1	Business Sectors Covered In The Market Analysis Chapter	6-61
6.27.2	Company Profile	6-61
6.27.3	Company Financials	6-62
6.28	SEN	6-63
6.28.1	Business Sectors Covered In The Market Analysis Chapter	6-63
6.28.2	Company Profile	6-63
6.28.3	Company Financials	6-63
6.29	TES	6-64
6.29.1	Business Sectors Covered In The Market Analysis Chapter	6-64
6.29.2	Company Profile	6-64
6.29.3	Company Financials	6-65
6.30	Tokyo Electron	6-66
6.30.1	Business Sectors Covered In The Market Analysis Chapter	6-66
6.30.2	Company Profile	6-66
6.30.3	Company Financials	6-69
6.31	Tokyo Seimitsu	6-70
6.31.1	Business Sectors Covered In The Market Analysis Chapter	6-70

6.31.2	Company Profile	6-70
6.31.3	Company Financials	6-71
6.32	Topcon Technohouse	6-72
6.32.1	Business Sectors Covered In The Market Analysis Chapter	6-72
6.32.2	Company Profile	6-72
6.32.3	Company Financials	6-72
6.33	Toray Engineering	6-73
6.33.1	Business Sectors Covered In The Market Analysis Chapter	6-73
6.33.2	Company Profile	6-73
6.33.3	Company Financials	6-74
6.34	Ulvac	6-75
6.34.1	Business Sectors Covered In The Market Analysis Chapter	6-75
6.34.2	Company Profile	6-75
6.34.3	Company Financials	6-76
6.35	Ushio	6-77
6.35.1	Business Sectors Covered In The Market Analysis Chapter	6-77
6.35.2	Company Profile	6-77
6.35.3	Company Financials	6-77
6.36	Wonik IPS	6-78
6.36.1	Business Sectors Covered In The Market Analysis Chapter	6-78
6.36.2	Company Profile	6-78
6.36.3	Company Financials	6-78
<b>LIST OF TABLES</b>		
1.1	Global Wafer Front End Equipment Companies	1-2
1.2	Capex By Company	1-5
2.1	Foundry Capex (\$ Millions)	2-3

2.2	Pure Play Foundry Forecast	2-5
2.3	Pure Play Foundry Revenue Shares	2-7
2.4	Foundry / Logic Lithography Demand	2-9
2.5	New Capacity Equipment Demand By Type	2-10
2.6	TSMC Wafer Price By Node – 2020-2025	2-11
2.7	TSMC Wafer Price By Node – 2025	2-12
2.8	TSMC Chip Features By Node	2-13
2.9	TSMC Top Customers By Revenue	2-14
2.10	Technology Roadmaps For China Foundries	2-16
2.11	Global Foundry Market By Linewidth	2-17
2.12	Foundry Capacity By Region	2-19
2.13	DRAM Wafer Capacity Forecast by Fab - Wafers	2-21
2.14	DRAM Earnings Comparisons by Company	2-22
2.15	DRAM Revenue Demand Forecast by Application	2-23
2.16	DRAM Market Shares	2-25
2.17	DRAM Capex Forecast by Company	2-26
2.18	NAND Wafer Capacity by Fab	2-28
2.19	NAND Earnings Comparison by Company	2-29
2.20	NAND Bit Growth Demand Forecast by Application	2-30
2.21	NAND Market Shares	2-32
2.22	Average Selling Prices (ASPs) Forecast	2-33
2.23	NAND Capex Forecast By Company	2-34
2.24	China Manufacturing Capacity	2-38
2.25	Chinese Equipment Suppliers And Top Foreign Supplier	2-39
2-26	China’s 8- And 12-Inch Fabs and Foundries	2-49
3.1	AMHS Market Forecast	3-2
3.2	CMP Market Forecast	3-5
3.3	Plasma Strip Market Forecast	3-9

3.4	Spray Processors Market Forecast	3-12
3.5	Wet Stations Market Forecast	3-15
3.6	ALD Market Forecast	3-19
3.7	Epitaxy Market Forecast	3-22
3.8	MOCVD Market Forecast	3-25
3.9	LPCVD (non-tube) Market Forecast	3-28
3.10	LPCVD (tube) Market Forecast	3-31
3.11	PECVD Market Forecast	3-34
3.12	PVD Market Forecast	3-37
3.13	Ion Implantation Market Forecast	3-40
3.14	Direct-Write E-Beam Lithography Market Forecast	3-44
3.15	Mask-Making Lithography Market Forecast	3-47
3.16	Steppers Market Forecast	3-50
3.17	Oxidation Market Forecast	3-53
3.18	Photoresist Processing (Track) Market Forecast	3-56
3.19	RTP Market Forecast	3-59
3.20	Dielectric Etch Market Forecast	3-63
3.21	Conductive Etch Market Forecast	3-66
3.22	Lithography Metrology Market Forecast	3-70
3.23	Thin-Film Metrology Market Forecast	3-73
3.24	Wafer Inspection and Defect Review Market Forecast	3-76
<b>LIST OF FIGURES</b>		
1.1	Semiconductor Equipment Billings	1-6
2.1	China's IC Production Forecast	2-40
2.2	China's IC Consumption	2-42
2.3	China's IC Production/Consumption Ratio	2-43

2.4	IC Import to China	2-44
2.5	China's IC Supply/Demand	2-45
2.6	China's IC Fab Capacity	2-47
2.7	China's IC Fab Capacity by Region	2-48
2.8	China's IC Fab Capacity by Wafer Size	2-51
2.9	China's IC Fab Capacity by Geometry	2-52
2.10	China's IC Production by Application	2-54
3.1	AMHS Market Shares	3-3
3.2	CMP Market Shares	3-6
3.3	Plasma Strip Market Shares	3-10
3.4	Spray Processors Market Shares	3-13
3.5	Wet Stations Market Shares	3-16
3.6	ALD Market Shares	3-20
3.7	Epitaxy Market Shares	3-23
3.8	MOCVD Market Shares	3-26
3.9	LPCVD (non-tube) Market Shares	3-29
3.10	LPCVD (tube) Market Shares	3-32
3.11	PECVD Market Shares	3-35
3.12	PVD Market Shares	3-38
3.13	Ion Implantation Market Shares	3-41
3.14	Direct-Write E-Beam Lithography Market Shares	3-45
3.15	Mask-Making Lithography Market Shares	3-48
3.16	Steppers Market Shares	3-51
3.17	Oxidation Market Shares	3-54
3.18	Photoresist Processing (Track) Market Shares	3-57
3.19	RTP Market Shares	3-60
3.20	Dielectric Etch Market Shares	3-64
3.21	Conductive Etch Market Shares	3-67

3.22	Lithography Metrology Market Shares	3-71
3.23	Thin-Film Metrology Market Shares	3-74
3.24	Wafer Inspection and Defect Review Market Shares	3-77