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## **Only 10 "Real" Players in 300mm Wafer Capacity Space**

*"Power" rating determines which companies will be primary adders of capacity in near future*

Semiconductor industry capital spending is becoming more concentrated, with a greater percentage of spending coming from a shrinking number of companies. As a result, IC industry capacity is also becoming more concentrated, and this trend is especially prevalent in 300mm wafer technology.

To determine which companies are most likely to come out on top of the dwindling group of leading-edge IC manufacturers, IC Insights created a "Power" Rating combining each company's rank in 300mm wafer capacity and its rank in capital spending.

While the details behind the Power rating are provided in

IC Insights' *Global Wafer Capacity 2010-11* report, it basically states that the lower the combined value of the capacity and capital spending ranks, the more likely a company is to be a significant player in future 300mm capacity additions (Figure 1).

Capital-spending ability plays a huge role in determining whether a company can install significant amounts of 300mm capacity. Although GlobalFoundries ranked 10th in 300mm capacity in 2010, the company landed three spots higher at 7th in the "Power" ranking, the biggest jump of any of the top 10 companies. TSMC is another top-10 company to show a higher "Power" rank than its installed capacity rank (3rd versus 5th, respectively). These two foundries are getting a boost from their currently aggressive capital spending plans and are very likely to add a significant amount of 300mm capacity over the next few years.

Overall, IC Insights believes that the top-10 companies in the "Power" ranking will be the primary drivers in adding capacity over the next few years. Among the companies ranked 11 through 22 are five that are moving to or continuing with a fab-lite strategy—Renesas, IBM, TI, ST, and Fujitsu. Even though TI and ST are adding some 300mm capacity for analog ICs, these five companies are essentially out of the running for adding large blocks of new 300mm capacity in the future. The others in the 11-to-22 group are mostly limited by funding availability (e.g., Powerchip, SMIC, ProMOS, Winbond, and Xinxin) or by a lack of desire (e.g., Rohm and Panasonic) to add significant amounts of 300mm capacity to produce leading-edge digital ICs.

### **MORE INFORMATION CONTACT**

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With only about 10 “real” players in the 300mm capacity space, the customer base for leading-edge IC production equipment has become very narrow. In IC Insights’ opinion, leading-edge IC equipment and materials suppliers must now strive to make these 10 companies a high-priority in their marketing strategies if they want to be successful over the next 5-10 years.

### "Power" Ranking of 300mm Wafer Capacity Leaders (2010)

300mm "Power" Ranking	Company	Headquarters Region	300mm Capacity Rank for 2010	Capital Spending Rank for 2010	300mm "Power" Rating*
1	Samsung	Korea	1	1	2
2	Intel	Americas	3	3	6
3	TSMC	Taiwan	5	2	7
4	Hynix	Korea	2	6	8
5	Toshiba/SanDisk	Japan/Americas	4	5	9
6	Micron	Americas	6	8	14
7	GlobalFoundries	Americas	10	4	14
8	Nanya	Taiwan	9	7	16
9	Elpida	Japan	7	10	17
10	UMC	Taiwan	12	9	21
11	Renesas	Japan	14	12	26
12	Powerchip	Taiwan	8	18	26
13	IBM	Americas	13	15	28
14	Texas Instruments	Americas	17	11	28
15	SMIC	China	18	13	31
16	ProMOS	Taiwan	11	21	32
17	STMicroelectronics	Europe	20	14	34
18	Fujitsu	Japan	16	22	38
19	Rohm	Japan	22	17	39
20	Panasonic	Japan	19	23	42
21	Winbond	Taiwan	15	28	43
22	Xinxin	China	21	29	50
<b>TOTAL</b>		—	—	—	—

\*Combined capacity and capital spending rankings (lower figure is best)

Source: Companies, IC Insights

**Figure 1**

### Report Details

IC Insights’ *Global Wafer Capacity 2010-11* report offers a thorough examination of the IC industry’s current capacity condition and projects changes in capacity levels through the year 2015. Buyers of the *Global Wafer Capacity* report get both a full-color hard copy and an electronic copy on CD-ROM for \$4,185

(repeat *Global Wafer Capacity* clients receive \$500 discount). The report is also available under a multi-user corporate license for \$6,990. Visit <http://www.icinsights.com/services/global-wafer-capacity/> for more information.

**About IC Insights**

IC Insights, Inc., based in Scottsdale, Arizona USA, is dedicated to providing high-quality, cost-effective market research for the semiconductor industry. Founded in 1997, IC Insights offers coverage of global economic trends, the semiconductor market forecast, capital spending and fab capacity trends, product market details, and technology trends, as well as complete IC company profiles and evaluations of end-use applications driving demand for ICs.

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