2009 | ABSTRACT

Pure Play Foundry Market Tracker

Global Uncertainty in Consumer Markets Slows Demand

By Len Jelinek, Principal Analyst

Forecast

Frequency, Time Period
- Annual
- Quarterly

Measures
- Revenue
- Capacity
- Wafer shipments

Regions, Markets
- Worldwide

Detail Level
- All

Applications/Products Covered

- All

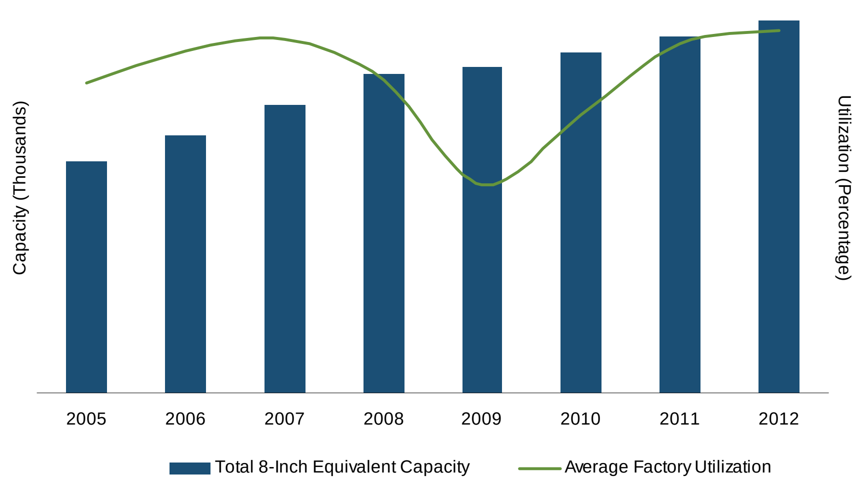
Technologies Covered

- CMOS logic

2009 will be the most challenging year ever for the Pure Play Foundry manufacturer! iSuppli is forecasting that year over year revenue will decline by 44.8%. Current factory utilizations are forcing foundries to reduce expenses in both capital for expansion, as well as R&D. iSuppli anticipates that the overall strategy for manufacturing will significantly be altered over the next two years with "Asset Light" being transformed into an "Asset Sharing". The key question facing companies is; "Which foundries have available capacity and technology that will result in market share growth?"

iSuppli's Pure Play Foundry Market Tracker will provide the latest information on strategies and partnerships of the key players within the industry while providing opinions for manufacturers to consider as they manage their way through 2009.

Pure Play Foundry Capacity and Utilization



Critical Questions Answered

- Where will fabless companies and IDM's find available capacity in the appropriate technology to meet their demands?
- What mergers or acquisitions are taking place in the foundry market, and how will they affect the suppliers as well as foundry users?
- What role will the Chinese foundries play in the market recovery in 2009 and beyond?
- What are the strategies for the key second tier foundries, and how can a small fabless company choose the right partner?
- Where should second tier foundries spend their CAPEX to maximize their investments? How long will this slow down last?

Who Should Read This?

- Purchasing
  - Strategic manufacturing analysts
  - Procurement managers
- Supplier/Distributors
  - Procurement managers
- Other
  - Sales managers
  - CEOs

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iSuppli

Lead Analyst

Len Jelinek, Principal Analyst
Since joining iSuppli, Len has focused his research on capacity management and technology transitions within the semiconductor industry. Len works with clients to access individual corporate strategies that may be impacted by additional wafer manufacturing capacity in China as well as other global locations.

Len has developed an extensive database of wafer manufacturing suppliers both leading IDM's and pure play foundries service providers. This database can be used by clients to define corporate manufacturing strategies such as expand internal capacity versus transitioning to an outsourcing model.

Len came to iSuppli after 28 years of experience in semiconductor manufacturing and business management in the semiconductor industry. He has gained invaluable experience with specific emphasis on program management, financial analysis, and manufacturing during his employ with ON Semiconductor and Motorola.

Len holds a BS in Chemistry from Arizona State University and an MBA from the University of Phoenix.

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Sample Database (continued)

Pure Play Foundry Service Providers and Selected Joint Ventures

Advanced Semiconductor Manufacturing Corporation (ASMC)
Altis Semiconductor
Chartered Semiconductor
China Resources Microelectronics Limited (Formally CSMC Technologies)
Dongbu HiTek
Episil Technologies Incorporated
Grace Semiconductor Manufacturing Corporation
He Jian Technology
Jazz Semiconductor
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Silterra Malaysia Sdn. Bhd.
System on Silicon Manufacturing (SSMC)
Taiwan Semiconductor Manufacturing Corporation (TSMC)
Tower Semiconductor
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Foundry Revenue Analysis

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Foundry Capacity and Utilization 0.35-micron
Foundry Capacity and Utilization 0.25-micron
Foundry Capacity and Utilization 0.18-micron
Foundry Capacity and Utilization 0.15-micron
Foundry Capacity and Utilization 0.13-micron
Foundry Capacity and Utilization 0.09-micron
Foundry Capacity and Utilization 0.065-micron
Foundry Capacity and Utilization 0.045-micron

China Foundry Capacity and Utilization Data

Capacity and Utilization of Major Chinese Pure Play Foundries