

Competitive Landscaping Tool (CLT)[™]

Battling for Success or Survival

By Dale Ford, Senior Vice President

Lead Analyst

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Dale Ford is a well-respected industry analyst with years of experience producing award winning market research reports and leading a team of analysts at Dataquest/Gartner Group recognized for being leading contributors within the organization. At iSuppli, Dale manages the research teams responsible for competitive analysis, forecasting, and supply/demand research of the electronics components industry. In addition, Dale focuses on research and enhanced visibility on the products, technologies, and players shaping the wireless communications market.

Dale was Chief Analyst and Director for Dataquest/Gartner Group, leading a team that delivered market research in seven syndicated services covering semiconductor applications, supply and pricing, and detailed equipment analysis. Prior to Dataquest/Gartner Group, he served at Sun Microsystems as a Product Marketing Associate.

Dale earned a BSEE degree with honors from Brigham Young University and an MBA from The Wharton School.

Compiled by iSuppli's worldwide group of industry experts, this market share database tool enables users who are interested in the global semiconductor industry to extract data and perform their own analysis across more than 131 product segments. Also available is the ability to extract a comprehensive view of 298 companies' performances.

The Competitive Landscaping Tool (CLT)[™] is an easy-to-use Microsoft Excel database that provides detailed coverage of the worldwide semiconductor market by company, product category, application market, and region. Users can set up their own data parameters and extract data exactly as they want to see it in user-friendly pivot tables.

Worldwide Ranking of the Top-20 Suppliers of Semiconductors in 2008						
(Ranking by Revenue in Millions of U.S. Dollars)						
2007 Rank	2008 Rank	Company Name	2007 Revenue	2008 Revenue	Percent Change	Percent of Total
1	1	Intel	33,995	33,767	-0.7%	13.1%
2	2	Samsung Electronics	19,691	16,902	-14.2%	6.5%
4	3	Toshiba	12,186	11,081	-9.1%	4.3%
3	4	Texas Instruments	12,275	11,068	-9.8%	4.3%
5	5	STMicroelectronics	10,000	10,325	3.3%	4.0%
8	6	Renesas Technology	8,001	7,017	-12.3%	2.7%
7	7	Sony	8,055	6,950	-13.7%	2.7%
13	8	Qualcomm	5,619	6,477	15.3%	2.5%
6	9	Hynix	9,047	6,023	-33.4%	2.3%
9	10	Infineon Technologies	6,201	5,954	-4.0%	2.3%
12	11	NEC Electronics	5,742	5,826	1.5%	2.3%
10	12	Advanced Micro Devices (AMD)	5,918	5,455	-7.8%	2.1%
14	13	Freescale Semiconductor	5,264	4,966	-5.7%	1.9%
19	14	Broadcom	3,746	4,643	23.9%	1.8%
17	15	Panasonic Corporation	3,880	4,473	15.3%	1.7%
15	16	Micron Technology	4,869	4,435	-8.9%	1.7%
11	17	NXP	5,746	4,055	-29.4%	1.6%
21	18	Sharp Electronics	3,401	3,607	6.1%	1.4%
18	19	Elpida Memory	3,838	3,599	-6.2%	1.4%
25	20	ROHM Semiconductor	2,633	3,348	27.2%	1.3%
		Top 20 Companies	170,107	159,971	-6.0%	61.9%
		All Others	103,056	98,479	-4.4%	38.1%
		Total Semiconductor	273,163	258,450	-5.4%	100.0%

Critical Questions Answered

- What was the overall size of the 2008 semiconductor market?
- How did individual product segments perform?
- In which geography did sales grow the most?
- Were there regional differences in company performances?
- What were the product strengths of specific companies?

Who Should Use This Tool?

- Purchasing
 - Purchasing managers
- Suppliers / Distributors
 - Marketing managers
 - Semiconductor vendors
- Investment community
 - Financial analysts
 - Market research analysts

Competitive Landscaping Tool (CLT)™**Annual Version**

This detailed database tool enables users who are interested in the global semiconductor industry to extract data and perform their own analysis across more than 131 semiconductor segments. Clients also have the ability to extract a comprehensive view of 298 companies' individual performances.

Company View

- Displays revenue for all semiconductor segments for a selected company
- Semiconductor revenue splits for all categories by company headquarters location
- Table that correlates semiconductor revenues with published company financial data for public companies

Semiconductor Segment View

- Ranks revenues for all companies in a selected semiconductor segment
- Category definitions aligned with WSTS categories

Custom Market Segment View

- Ranks companies based on aggregation of selected semiconductor segment revenues

Application View

- Ranks companies for select market
- Ability to aggregate application markets
- Application market views for six major segments

Companies

- 298 semiconductor suppliers

Technologies

- All semiconductor devices (131 categories and sub-categories)

Time Periods

- Full Years 2001 - 2008

Regions

- Worldwide
- Regional (for "Total Semiconductor" only)

Major M&A Activity

- Noted directly in Total Semiconductor Ranking Table

Fabless Identification**Financial Profit Data ~ New ~**

- Displays Gross Profit, Gross Margin, Operating Profit and Operating Margin data for 210 companies (out of 298 companies in the database).
- Ability to rank companies by profit and margin data
- Full Years 2007 - 2008

Quarterly Version

This database tool provides users with quarterly updates on more than 30 semiconductor product segments and 132 companies' individual performances. The easy-to-use database enables users to extract data and perform their own analysis of the global semiconductor market. Clients also have the ability to extract a comprehensive view of 132 companies' individual performances.

Company View

- Displays revenue for all semiconductor segments for a selected company
- Semiconductor revenue splits for all categories by company headquarters location
- Table that correlates semiconductor revenues with published company financial data for public companies

Semiconductor Segment View

- Ranks revenues for all companies in selected semiconductor segment
- Category definitions aligned with WSTS categories

Custom Market Segment View

- Ranks companies based on aggregation of selected semiconductor segment revenues and/or time periods

Application View

- Ranks companies for select market
- Ability to aggregate application markets
- Application market views for six major segments

Companies

- 132 semiconductor suppliers
- Represents 91% of market

Technologies

- 34 major semiconductor devices

Time Periods

- Quarterly beginning Q1 2002
- Ability to aggregate time periods

Regions

- Worldwide
- Regional (for "Total Semiconductor" only)

Major M&A Activity

- Noted directly in Total Semiconductor Ranking Table

Fabless Identification**Financial Profit Data ~ New ~**

- Displays Gross Profit, Gross Margin, Operating Profit and Operating Margin data for 110 companies (out of 132 companies in the database).
- Ability to rank companies by profit and margin data
- Data beginning Q1 2007

Regional Version

This detailed database tool enables users who are interested in the regional semiconductor markets to extract data and perform their own analysis across more than 30 product segments. Clients also have the ability to extract a comprehensive view of more than 298 companies' individual performances.

Company View

- Displays revenue for all semiconductor segments for a selected company
- Semiconductor revenue splits for all categories by company headquarters location
- Table that correlates semiconductor revenues with published company financial data for public companies

Semiconductor Segment View

- Ranks revenues for all companies in selected semiconductor segment
- Category definitions aligned with WSTS categories

Custom Market Segment View

- Ranks companies based on aggregation of selected semiconductor segment revenues

Application View

- Ranks companies for select market
- Ability to aggregate application markets
- Application market views for six major segments

Companies

- 298 semiconductor suppliers

Technologies

- 37 major semiconductor devices

Time Periods

- Full Years 2003 - 2008

Regions

- Worldwide
- Americas
- Japan
- Asia-Pacific
- EMEA (Europe/Middle East/Africa)

Major M&A Activity

- Noted directly in Total Semiconductor Ranking Table

Fabless Identification**Financial Profit Data ~ New ~**

- Displays Gross Profit, Gross Margin, Operating Profit and Operating Margin data for 210 companies (out of 298 companies in the database).
- Ability to rank companies by profit and margin data
- Full Years 2007 - 2008