

# Semiconductor WEEK:

August 5, 2022

## *An overview of results and conclusions from recent reports at TechInsights*

### Chip Market Research Services

#### *It's cooling off as more fog rolls in*

- Order activity for semiconductor equipment continued to trend lower, slipping to 86 degrees
- The activity in the Back-end is cooling off considerably due to weaker market conditions, especially in the Memory and consumer-centric markets
- IC Inventory Levels

### Semiconductor Analytics

#### *Last Week in the Semiconductor Market:*

Semiconductor sales slipped sequentially but were 8% above 2021 levels last week. The IC weather warmed 1°F.

Zooming in on NAND this week, the 13-wk MA grew 6% Y/Y, it peaked for the year at 35% growth in early March. TechInsights forecasts NAND will reach \$65B in 2022, with Y/Y growth of 7% that falls to -3% in 2023.

TechInsights' IC Supply/Demand indices held last week at Saturated, as conditions were mostly unchanged in a buyer's market. More Moore Foundry rose out of a Glut into Saturated levels. Chip demand is being cooled by inflation and monetary tightening. Capacity expansion and Just-in-Case are driving up supply and inventory.

Electronics' Retail Prices are declining as demand wanes.

### Customer Satisfaction Survey

**White Paper:** ASM Pacific Technology wins its Sixth Triple Crown

### Chip History Center

**Semiconductor Equipment Too Expensive:** Circa 1978 ... Wafer fab costs skyrocketing out of control. Predictions of a tool costing \$1B. And yet, they'll still make money.

**Maskless Lithography:** Circa 1977 ... IBM's EL-1: a milestone in e-beam lithography and semiconductor history.

### The Chip Insider

**Strategy and Tactics:** Exchange Rates. Forecasting Guide. Risk vs Uncertainty.

### Semiconductor Stocks

- *TechInsights' Semiconductor Stock Indices grew this week*
- *Semiconductor Stock Index was led up by SkyWater Technology*
  - *SkyWater was this week's biggest winner*
- *Semiconductor Equipment Stock Index was led up by Advantest*
- *EDA Stock Index was led up by Ansys*
- *Electronics Materials Stock Index fell*
- *Hottest Stocks: SkyWater Technology, JCET, Amkor, Advantest, SMIC, and AMD*

# ASM Pacific Technology

## Wins its Sixth Triple Crown

### TechInsights Customer Satisfaction Survey 2022



[Click for White Paper](#)


**TechInsights**



# ASM Pacific Technology Awarded 10 BEST Supplier



- ASM Pacific Technology, the world leader in the supply of semiconductor assembly and packaging equipment, receives 4½ Stars
  - increases score by 37 basis points to an impressive 8.84
- Awarded RANKED 1<sup>st</sup> in Assembly Equipment Suppliers for the sixth year in a row
- ASM Pacific Technology’s value driven and service-oriented customer partnerships delivers consistently high levels of customer satisfaction

LARGE SUPPLIERS OF CHIP MAKING EQUIPMENT	Rating	TechInsights Stars
Advantest	9.48	★★★★★
ASML	9.37	★★★★★
<b>ASM  Pacific Technology</b>	8.84	★★★★★
Edwards	8.45	★★★★★
Teradyne	8.15	★★★★★
Kokusai Electric	7.94	★★★★★
Lam Research	7.88	★★★★★
Tokyo Electron	7.73	★★★★★
Applied Materials	7.70	★★★★★
Hitachi High-Tech	7.63	★★★★★

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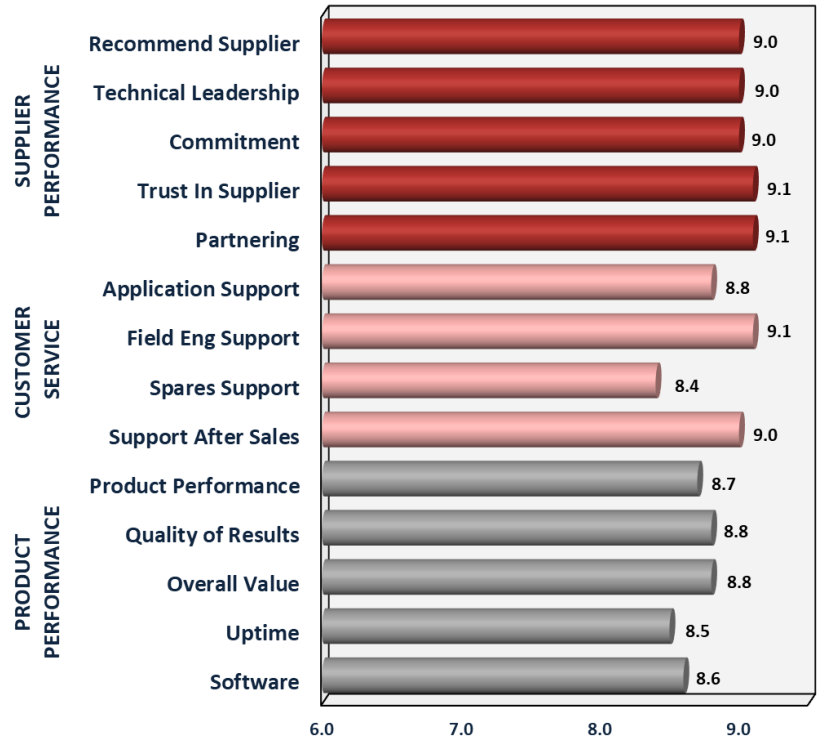
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# How Customers Perceive ASM Pacific Technology

- Improves ratings in all 14 categories
  - *quality of results* up 80 basis points
  - *technical leadership, overall value, and software* up 50 basis points
  - *recommend supplier, trust in supplier, spares support, and product performance* up 40 basis points
- Earns the highest score of all THE BEST *Assembly Equipment Suppliers* in 12 categories
- Highest scores\*
  - *Trust In Supplier*
  - *Partnering*
  - *Field Engineering Support*
  - *Recommend Supplier*
  - *Technical Leadership*
  - *Commitment*
  - *Support After Sales*

\*Listed in order of score, highest to lowest



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**TechInsights**

# The Chip Insider<sup>®</sup>'s Graphics File



## July 2022

*It's cooling off as more fog rolls in*



- Order activity for semiconductor equipment continued to trend lower, slipping to 86 degrees
- Subcon/Adv. Packaging led the decline with temperatures tumbling 8 points last week
- The activity in the Back-end is cooling off considerably due to weaker market conditions, especially in the Memory and consumer-centric markets
- TechInsights' Chip Price Performance Index remained in a free-fall state

Forecast as of July 2022:	2021	2022
<b>Semi Equipment (\$B):</b>	<b>\$ 126.6</b>	<b>\$ 143.1</b>
Sequential Change	36.6%	13.0%
<b>Capacity Utilization:</b>	97.2%	96.5%
<b>ICs (\$B):</b>	<b>\$ 492.3</b>	<b>\$ 555.8</b>
Sequential Change	27.4%	12.9%
<b>IC Units (BU):</b>	394.2	426.0
Sequential Change	23.7%	8.1%
<b>Electronics (\$B) :</b>	<b>\$ 2,574</b>	<b>\$ 2,732</b>
Sequential Change	18.9%	6.1%

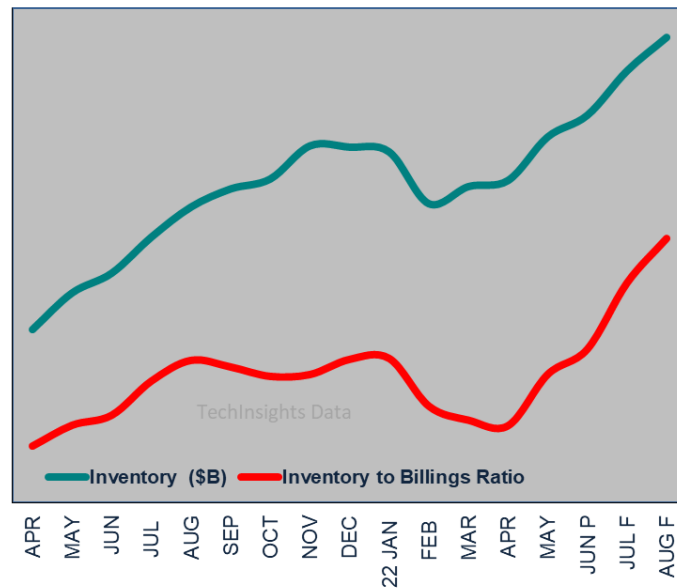
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# The Chip Insider<sup>®</sup> Graphics

Overall inventories are surging

**IC Inventory Levels:** chart gives rolling averages for semiconductor integrated circuit inventories held at OEMs and in Die Banks

## Semiconductor Inventory



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## Insights Interview:

# 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](#)

# Semiconductor Analytics

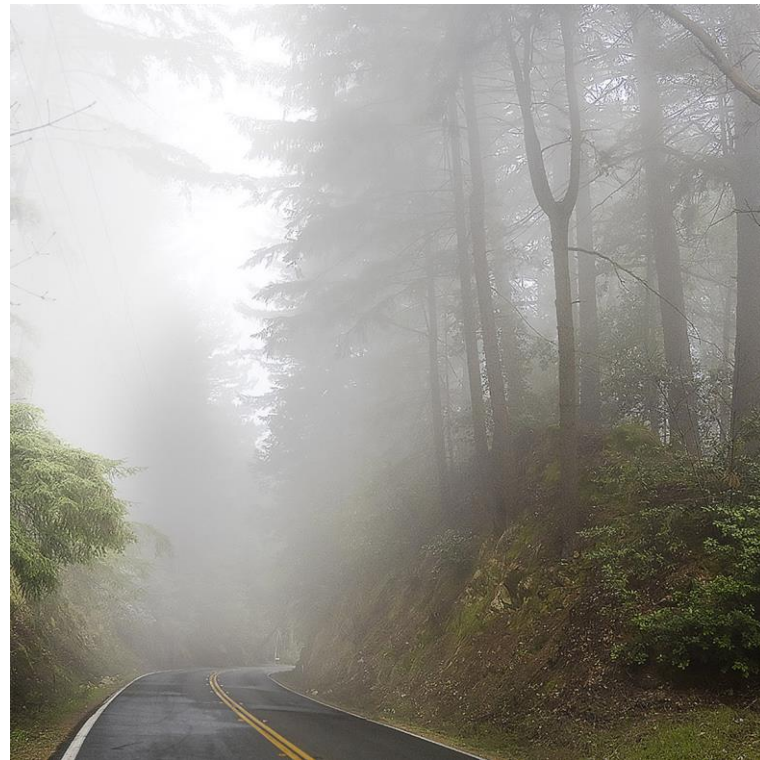
## Last Week in the Semiconductor Market:

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Electronics' Retail Prices are declining as demand wanes.



1: Measures Order Activity 2: Measures Pricing Power

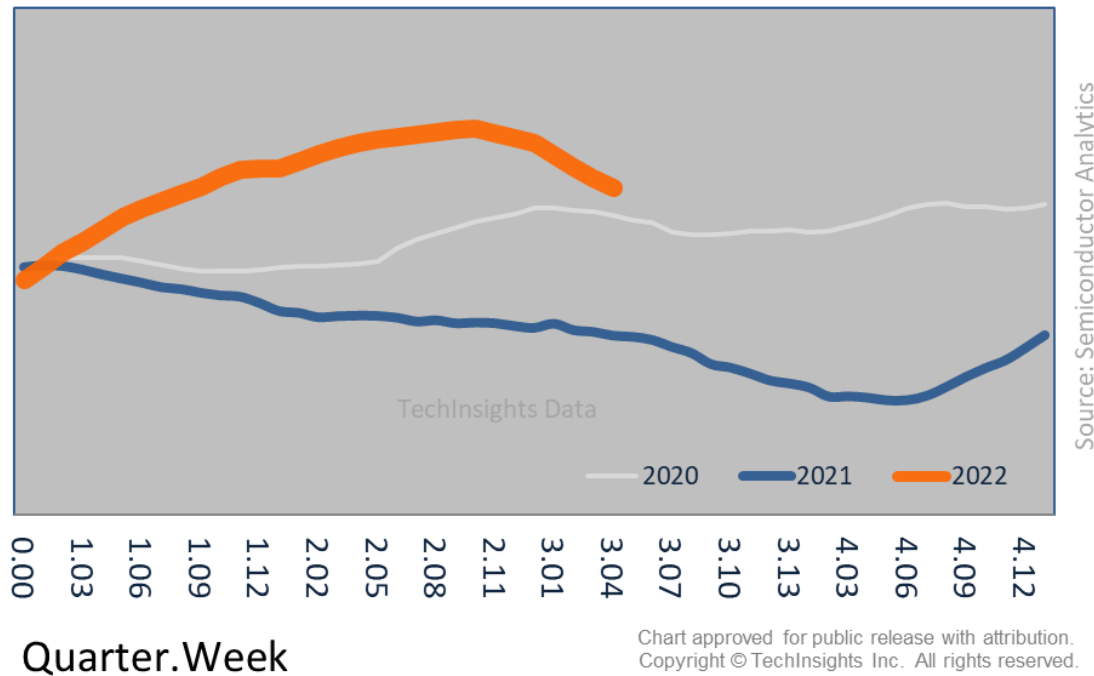


# Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Electronics' Retail Prices continue to decline as demand wanes

Electronics Pricing Barometer  
indexed 13 week moving average



Source: Semiconductor Analytics

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## Strategy & Tactics



**Strategy and Tactics:** Exchange Rates. Forecasting Guide.  
Risk vs Uncertainty.

### Summaries:

**Comments, Questions & Answers:** Dan, What's up with exchange rates? The Euro is at parity with the Dollar and the Yen is approaching 140 to the dollar. Back at the start of 2021, the Euro was around 80 cents and the yen near 100. This is going to be a swing factor in next year's sales and market share distribution.

**Dan's Guide to Forecasting:** SEMICON West made it clear we've entered a difficult forecasting environment, so it's a good time to back over my favorite tools and methods. I've been forecasting since the mid-seventies, so it's reasonable to expect I've learned plenty from the successes and failures. Over the years I've learned accuracy is far more about the mind than it is about the tools... Key Concepts in Forecasting ... rules of forecasting and laws ... Or to paraphrase Mike Tyson, "Everybody has a model until reality punches them in the face." ... forecasting tools ... Econometrics ... Linear Regression ... ARIMA time-series models ... AI and Deep Learning ... Bias ...

**Maxims Reloaded:** Risk vs Uncertainty: Know which is the basis behind any decision that needs to be made. Misreading situations of risk versus uncertainty in decision-making can result in bad decisions because the best method under one can be the worst under another. It's how the world's financial system almost collapsed between 2007 and 2008.

*"When everything seems to be going against you ...  
remember that the airplane takes off against the wind"*  
— Henry Ford

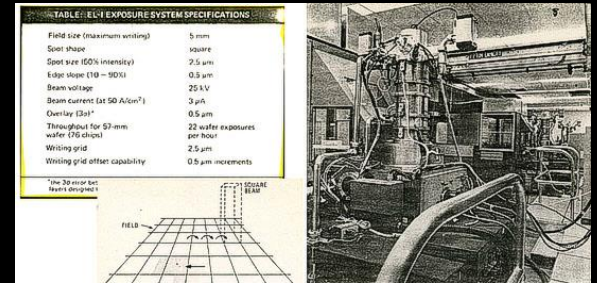
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**TechInsights**



**Semiconductor Equipment Too Expensive:** Circa 1978 ... Wafer fab costs skyrocketing out of control. Predictions of a tool costing \$1B. And yet, they'll still make money. This Electronic News article addresses a constantly recurring issue in Integrated Circuit history: that semiconductor equipment costs are skyrocketing out of control. Mentioned are the rise in process steps, new wafer sizes, lithography tool prices for which he was fairly accurate in his projections. But the projection of a single tool costing >\$1B was never to be. Read this to find out which tool might command this exorbitant price.

**Maskless Lithography:** Circa 1977 ... IBM's EL-1: a milestone in e-beam lithography and semiconductor history. This Electronics article marks a milestone that heralds the recurring dream that direct-write lithography using an electron beam would someday replace masks and optical lithography. The specs of this system show just how good IBM research is as an institution. Achieving a square beam was a major breakthrough. Its registration accuracy was better than half that of any optical aligner in its day. It was needed to ensure lines could be stitched together. Most important was its throughput of 22 wafers-per-hour, which brought IBM's EL-1 closest to displacing optical.



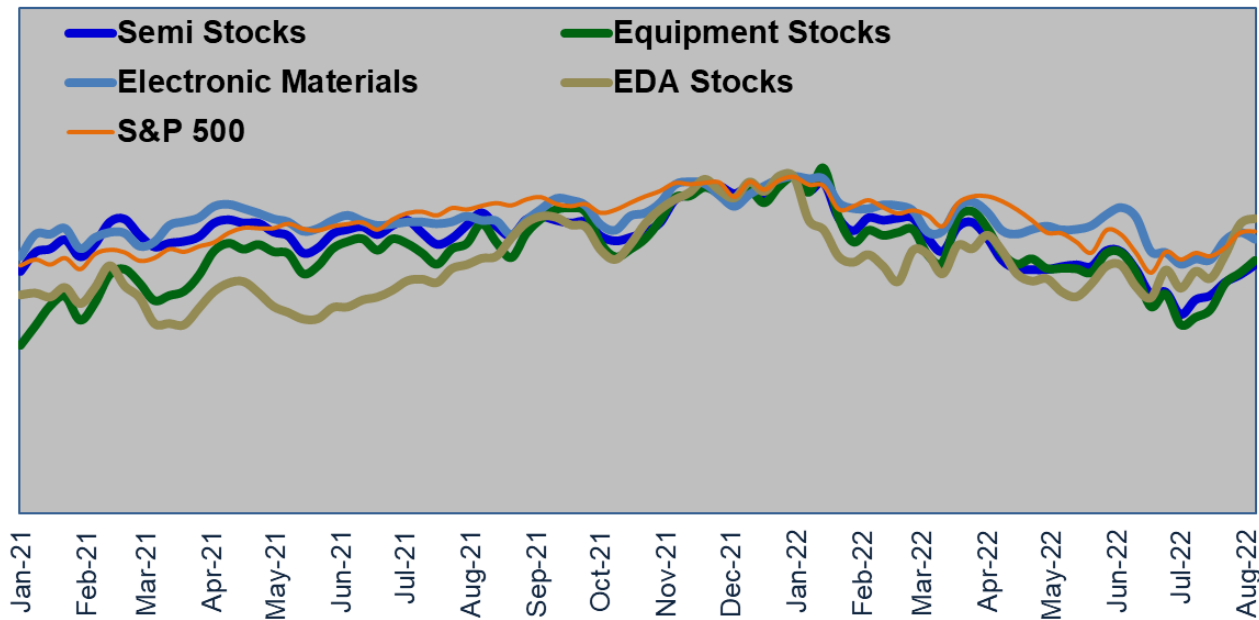
# semiStockWEEK:

TechInsights' Semiconductor Stock Indices grew this week with the exception of the Electronic Materials stocks which fell this week.



## Semiconductor Industry Stock Performance Indices

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



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### TechInsights' Stock Indices:

Semiconductors +3.1%  
Equipment +3.8%  
Electronic Materials -1.9%  
EDA +1.5%

# Semiconductor Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			8/5/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
<b>IDM</b>			<b>Fab-lite to Fabless</b>		
Intel	-2.5%	10	AMD	8.3%	19
Micron	1.0%	10	Analog Devices	3.1%	18
ON Semiconductor	1.3%	14	Broadcom	3.0%	13
Samsung Electronics	0.2%	-	IBM	1.4%	13
SK hynix	0.6%		Infineon	4.1%	14
STMicroelectronics	1.6%	11	MagnaChip Semiconductor	-5.2%	11
Western Digital	-4.1%	6	MaxLinear	4.7%	10
<b>Foundry &amp; OSAT</b>			MediaTek	5.0%	-
Amkor	12.3%	7	NVIDIA	4.5%	29
ASE	3.6%	6	Panasonic	0.4%	11
GLOBALFOUNDRIES	3.1%	22	Qualcomm	3.6%	11
JCET	13.2%	13	Silicon Laboratories	3.3%	35
SkyWater Technology	33.8%	-	Skyworks	3.5%	9
SMIC	9.3%	11	Texas Instruments	3.0%	20
TSMC	1.4%	14			
UMC	1.9%	7			

Above Avg

Top 4-6

Top 1-3

**TechInsights' Semiconductor Stock Index** was led up by SkyWater Technology which announced its membership in ASIC today. Other top performers this week were JCET, Amkor, SMIC, and AMD.

IDM -0.3%  
 Foundry & OSAT +9.8%  
 Fabless & Fablite +3.0%

AMD<sup>AMD</sup> Analog Devices<sup>ADI</sup> Amkor<sup>AMKR</sup> ASE  
 ASX<sup>ASX</sup> Broadcom<sup>AVGO</sup> GLOBALFOUNDRIES<sup>GFS</sup>  
 IBM<sup>IBM</sup> Infineon<sup>IFNNY.PK</sup> Intel<sup>INTC</sup>  
 JCET<sup>600584.SS</sup> Micron Technology<sup>MU</sup> On  
 Semiconductor<sup>ON</sup> Panasonic<sup>PC</sup> MagnaChip  
 Semiconductor<sup>MX</sup> MaxLinear<sup>MXL</sup>  
 MediaTek<sup>2454.TW</sup> NVIDIA<sup>NVDA</sup> Qualcomm<sup>QCOM</sup>  
 Samsung Electronics<sup>005930.KS</sup> Silicon  
 Laboratories<sup>SLAB</sup> SkyWater Technology<sup>SKYT</sup>  
 Skyworks<sup>SWKS</sup> SMIC<sup>SMI</sup> STMicroelectronics<sup>STM</sup>  
 Texas Instruments<sup>TXN</sup> TSMC<sup>TSM</sup> UMC<sup>UMC</sup>  
 Western Digital<sup>WDC</sup>

# Chip Equipment & Related Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			8/5/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
<b>Wafer Fab:</b>			<b>Test:</b>		
Applied Materials	3.4%	13	Advantest	10.8%	-
ASM International	1.0%	22	Teradyne	-0.1%	16
ASML	0.5%	28	FormFactor	0.4%	20
KLA	3.2%	17			
Lam Research	3.9%	14	<b>Assembly:</b>		
Onto Innovation	7.3%	-	BESI	1.4%	-
Nikon	2.2%	-	Kulicke & Soffa	4.9%	8
TEL	6.2%	-	ASM Pacific Technology	7.0%	
Veeco Instruments	1.7%	11			

Above Avg
Top 4-6
Top 1-3

**TechInsights' Semiconductor Equipment Stock Index** was led up by Advantest which was one of this week's top performers. Almost all companies finished in positive territory this week.

WFE +3.3%  
 Test +3.7%  
 Assembly +4.4%

Applied Materials <sup>AMAT</sup> Advantest <sup>ATEYY</sup>  
 ASM International <sup>ASMIY</sup>  
 ASM Lithography <sup>ASML</sup> ASM Pacific <sup>0522.HK</sup>  
 BE Semiconductor <sup>BESII.PK</sup>  
 FormFactor <sup>FORM</sup> KLA <sup>KLAC</sup>  
 Kulicke & Soffa <sup>KLIC</sup> Lam Research <sup>LRCX</sup>  
 Onto Innovation <sup>ONTO</sup> Nikon <sup>7731</sup> Teradyne <sup>TER</sup>  
 Tokyo Electron Limited <sup>8035</sup> Veeco <sup>VECO</sup>

# Electronic Materials Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			8/5/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
<b>EDA</b>			DNP	-2.0%	–
Cadence	0.3%	41	DuPont de Nemours	-3.9%	5
Synopsys	1.8%	38	JSR	-17.1%	–
Ansys	2.3%	32	Shin-Etsu	1.8%	–
<b>Electronic Materials</b>			SOITEC	4.1%	–
BASF	2.0%	2	Tokyo Ohka	4.1%	–
Entegris	-3.8%	23			

Above Avg
Top 4-6
Top 1-3

TechInsights' EDA Stock Index was led up by Ansys.

TechInsights' Electronic Materials Stock Index fell this week, the only winners were SOITEC, Tokyo Ohka, and BASF.

Ansys, Inc. <sup>ANSS</sup>    BASF <sup>BASFY</sup>  
 Entegris <sup>ENTG</sup>    Cadence <sup>CDNS</sup>    DNP <sup>7912</sup>  
 DuPont <sup>DD</sup>    JSR <sup>4185</sup>    Shin-Etsu <sup>4063</sup>  
 SOITEC <sup>SOI.PA</sup>    Synopsys <sup>SNPS</sup>    Tokyo Ohka <sup>4186</sup>

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							
31-Dec-21	100.0	100.0	100.0	100.0	1.5%	2.3%	0.7%	-0.2%	44	8.1%	-11	-2.7%	10.8%	100.0	0.9%
07-Jan-22	96.6	96.3	99.4	89.7	-3.4%	-3.7%	-0.6%	-10.3%	10	7.4%	-45	-17.5%	24.9%	98.1	-1.9%
14-Jan-22	98.5	102.0	99.3	87.4	2.0%	5.9%	-0.1%	-2.5%	36	23.7%	-20	-4.9%	28.6%	97.8	-0.3%
21-Jan-22	90.1	90.4	93.8	81.0	-8.5%	-11.4%	-5.6%	-7.3%	3	5.1%	-53	-20.3%	25.4%	92.3	-5.7%
28-Jan-22	87.1	84.5	92.4	79.7	-3.4%	-6.6%	-1.5%	-1.7%	11	5.0%	-45	-21.8%	26.8%	93.0	0.8%
04-Feb-22	90.2	87.3	92.3	81.5	3.5%	3.3%	-0.1%	2.3%	41	17.5%	-13	-4.3%	21.8%	94.4	1.6%
11-Feb-22	89.6	86.1	93.2	78.7	-0.7%	-1.4%	1.0%	-3.4%	20	10.6%	-33	-8.9%	19.5%	92.7	-1.8%
18-Feb-22	90.1	86.8	93.0	75.0	0.6%	0.8%	-0.2%	-4.7%	28	12.2%	-26	-7.0%	19.2%	91.2	-1.6%
25-Feb-22	90.1	87.5	91.9	82.5	0.0%	0.8%	-1.3%	9.9%	30	14.7%	-25	-9.5%	24.2%	92.0	0.8%
04-Mar-22	85.3	81.4	86.8	81.5	-5.3%	-6.9%	-5.5%	-1.2%	7	6.4%	-48	-18.6%	25.0%	90.8	-1.3%
11-Mar-22	82.1	79.7	87.1	76.9	-3.7%	-2.2%	0.3%	-5.7%	9	9.7%	-45	-11.1%	20.8%	88.2	-2.9%
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%



# Links to Conference Call Transcripts

August 5<sup>th</sup>

[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](#)

July 22<sup>nd</sup> and before

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