

# Semiconductor WEEK:

September 2, 2022

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

## Chip Market Research Services

### ***All eyes are focused on 2023***

- Order activity for semiconductor equipment continued to cool off, dropping by half a point to 83 degrees
- SOC Mobile, SOC Compute, and DAO are keeping the overall order activity in positive territory
- IC Inventory Levels

## Semiconductor Analytics

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

Semiconductor sales continued to rise last week at levels 7% above 2021 but were still down Q/Q. However, the IC weather cooled 3°F. Zooming in on Auto ICs this week, the 13-wk MA grew 24% Y/Y, cooling off last year's peak of 86% in July. TechInsights forecasts it will reach \$35B in 2022, with Y/Y growth of 23% which cools to 9% in 2023.

TechInsights' IC Supply/Demand indices continued to weaken last week. Foundry dropped from Saturated to Glut, as More Moore dipped to Glut. More than Moore and OSAT fell to Saturated. Memory stayed in Glut conditions, IDM in Loose, Analog and Power in Balanced, while Auto ICs remain in Shortage though it has steadily loosened since April. Electronics' Retail Price decline is showing early signs of bottoming.

## Chip History Center

**IBM's development of copper interconnect for ICs** September 1997: IBM was first with copper interconnect for semiconductors. IBM's announcement was a press release heard around the world.

**Intel: 50 Years of Leadership:** Six people have held the title of CEO over the first fifty years of Intel's existence. All six have faced and have had to overcome great challenges.

## The Chip Insider

**Strategy and Tactics:** Workforce Development Needs and New Export Controls.

## **Semiconductor Stocks**

- *TechInsights' Semiconductor Stock Indices all plummeted this week along with the market*
- *Semiconductor Stock Index plunged*
  - *JCET came out on top*
- *Semiconductor Equipment Stock Index plummeted*
- *EDA Stock Index plunged*
- *Electronics Materials Stock Index sunk*
  - *BASF was this week's only winner*
- *Hottest Stocks: BASF, JCET, DNP, STMicroelectronics, UMC, and Infineon*

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



## August 2022

*All eyes are focused on 2023*

- Order activity for semiconductor equipment continued to cool off, dropping by half a point to 83 degrees
- SOC Mobile, SOC Compute, and DAO are keeping the overall order activity in positive territory
- Within the equipment market there is bifurcation between WFE and the Back-end
- TechInsights' Chip Price Performance Index plunged



Forecast as of August 2022:	2021	2022
<b>Semi Equipment (\$B):</b>	<b>\$ 126.9</b>	<b>\$ 139.4</b>
Sequential Change	36.9%	9.9%
<b>Capacity Utilization:</b>	97.2%	96.2%
<b>ICs (\$B):</b>	<b>\$ 492.3</b>	<b>\$ 529.1</b>
Sequential Change	27.4%	7.5%
<b>IC Units (BU):</b>	394.2	419.3
Sequential Change	23.7%	6.4%
<b>Electronics (\$B) :</b>	<b>\$ 2,574</b>	<b>\$ 2,622</b>
Sequential Change	18.9%	1.9%

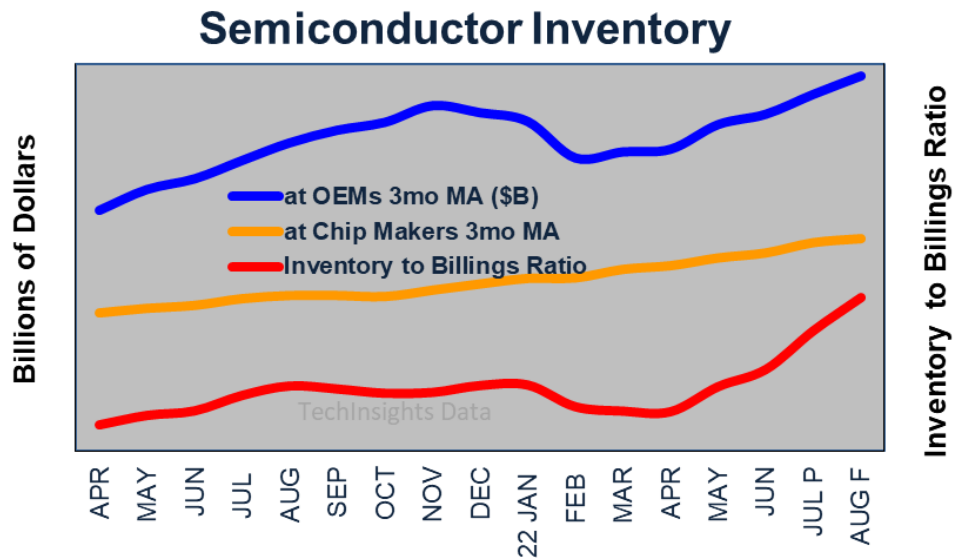
[Contact us to access more details](#)

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

## IC Inventory Levels:

- Inventories are rising

**IC Inventory Levels:** chart gives rolling averages for semiconductor integrated circuit inventories held at OEMs, in Die Banks, and the total Inventory-to-Billing Ratio



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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

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Electronics' Retail Price decline is showing early signs of bottoming.



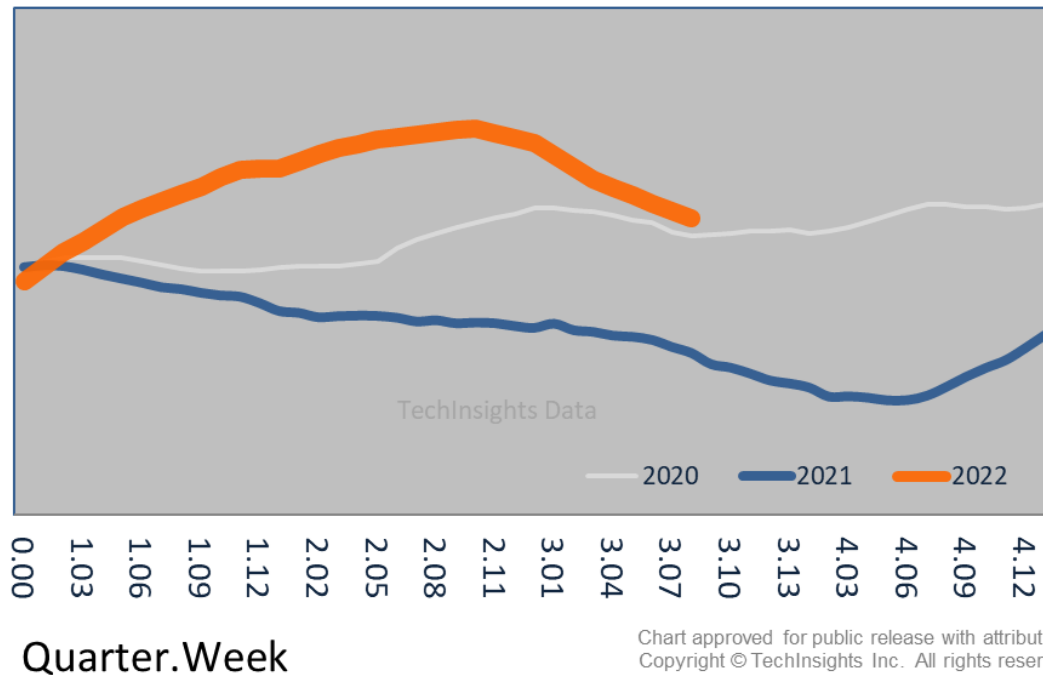
1: Measures Order Activity 2: Measures Pricing Power

# Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Electronics' Retail Price decline is showing early signs of bottoming.

Electronics Pricing Barometer  
indexed 13 week moving average



Source: Semiconductor Analytics

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**Strategy and Tactics:** *Workforce Development Needs and New Export Controls.*

### **Summaries:**

#### **Happenings, Comments, Questions & Answers:**

*Chips and Chiplet Strategy... “Fast forward to tomorrow when those fabs are built. How are we going to fill them with people? America has the technology and capital to lead. The big issue will be having the people with the STEM skills needed to work in the fabs.” I saw this reference to illiteracy in George Will’s great WaPo column... In the article he writes, “More than half of Americans between ages 16 and 74 read below the sixth-grade level...”*

*Export Controls on EDA and Wide Bandgap Substrates: New announcement from the US on restrictions of chip tech exports. There are two restrictions that affect our industry: One is on Gallium-Oxide and Diamond substrates and the other ECAD tools... Five years ago, China’s EDA offerings were essentially unusable. Today they are very competitive with...*

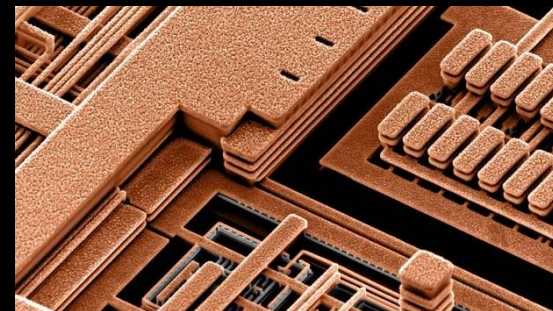
**Maxims:** *Align your core strengths... It is a very dangerous error to fail to align the chain of getting products to customers. Yet, it is a very common error. Most companies, when they do make it, fail to recognize it as the source of their problems.*

*“If you don’t like what’s being said, change the conversation”*

*— Don Draper, Mad Men*



**IBM's development of copper interconnect for ICs** September 1997: IBM was first with copper interconnect for semiconductors. IBM's announcement was a press release heard around the world. The images were stunning at the time. More important was that it marked the successful culmination of a decade-long search for a material to replace aluminum. IBM would ramp copper production in three quarters on its 220nm microprocessors. Everyone was working on a solution ... most on the wrong solution. The interesting untold stories center around the decision-making process at IBM and the untruths propagated by the PR machines of the day. One of the hardest things to do in R&D management is to choose which mountain to climb. Otherwise, your resources will be wasted away while researchers try to climb every mountain.



**Intel: 50 Years of Leadership:** Six people have held the title of CEO over the first fifty years of Intel's existence. All six have faced and have had to overcome great challenges. At the same time, no leader can be great without great followers. The real question is, what did these leaders set out to accomplish, did they achieve their goals, and what problems did they leave for each that followed them.



Supporters:



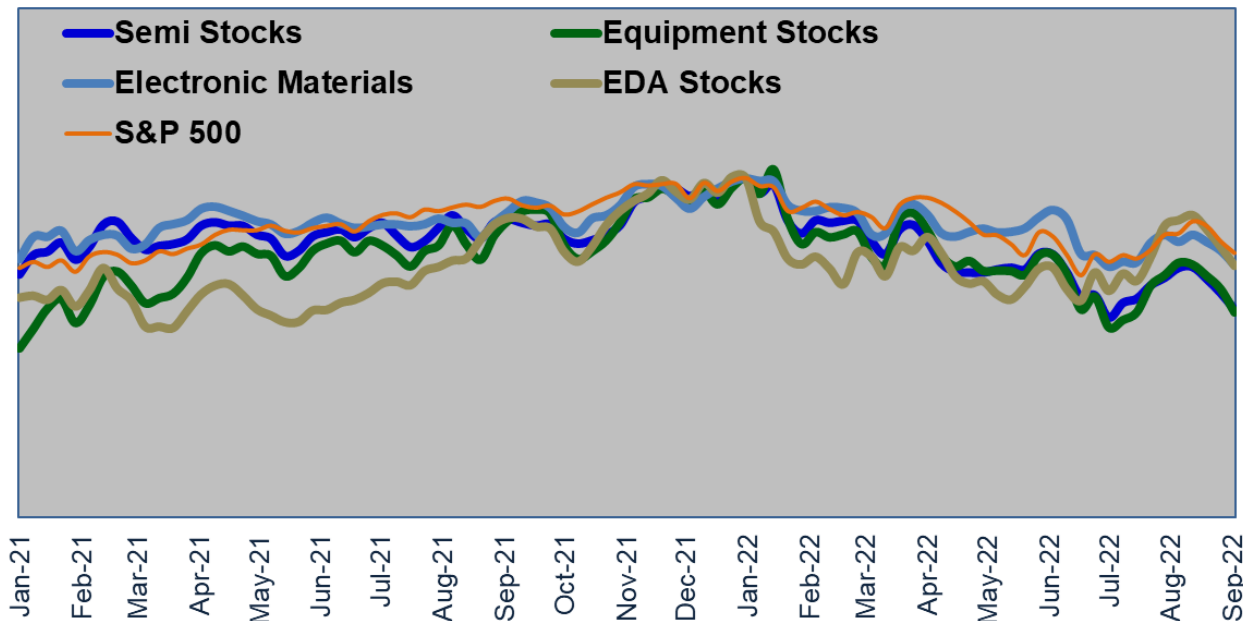


# semiStockWEEK: *TechInsights' Semiconductor Stock Indices all plummeted again this week along with the market.*



## Semiconductor Industry Stock Performance Indices

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



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### TechInsights' Stock Indices:

Semiconductors -5.4%  
Equipment -7.5%  
Electronic Materials -4.1%  
EDA -5.4%

# Semiconductor Stocks:

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

Weekly Gains			9/2/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
<b>IDM</b>			<b>Fab-lite to Fabless</b>		
Intel	-6.4%	12	AMD	-12.0%	19
Micron	-2.3%	15	Analog Devices	-6.3%	17
ON Semiconductor	-5.7%	15	Broadcom	-4.0%	13
Samsung Electronics	-4.2%	-	IBM	-2.0%	13
SK hynix	-3.6%		Infineon	-1.8%	12
STMicroelectronics	-1.3%	10	MagnaChip Semiconductor	-3.3%	16
Western Digital	-8.4%	8	MaxLinear	-7.1%	9
<b>Foundry &amp; OSAT</b>			MediaTek	-8.6%	-
Amkor	-8.1%	7	NVIDIA	-16.1%	26
ASE	-5.3%	6	Panasonic	-2.7%	11
GLOBALFOUNDRIES	-4.6%	24	Qualcomm	-7.2%	11
JCET	-0.2%	14	Silicon Laboratories	-10.1%	31
SkyWater Technology	-11.8%	-	Skyworks	-3.9%	9
SMIC	-4.0%	10	Texas Instruments	-3.8%	19
TSMC	-4.5%	13			
UMC	-1.7%	7			

Above Avg

Top 4-6

Top 1-3

**TechInsights' Semiconductor Stock Index** plunged again this week. JCET, STMicroelectronics, Infineon, and UMC decreased the least and claimed four of the top six stock spots.

IDM -4.6%  
 Foundry & OSAT -5.0%  
 Fabless & Fablite -6.3%

AMD<sup>AMD</sup> Analog Devices<sup>ADI</sup> Amkor<sup>AMKR</sup> ASE<sup>ASE</sup>  
 ASX<sup>ASX</sup> Broadcom<sup>AVGO</sup> GLOBALFOUNDRIES<sup>GFS</sup>  
 IBM<sup>IBM</sup> Infineon<sup>IFNYY.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

**TechInsights' Semiconductor Equipment Stock Index** plummeted this week, Kulicke & Soffa, Lam Research, ASM Pacific Technology, and Nikon were the only four companies to finish above the weekly average.

WFE -7.8%  
Test -9.7%  
Assembly -5.8%

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>

Weekly Gains			9/2/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
<b>Wafer Fab:</b>			<b>Test:</b>		
Applied Materials	-7.7%	12	Advantest	-8.7%	-
ASM International	-6.4%	21	Teradyne	-7.9%	14
ASML	-8.4%	25	FormFactor	-12.5%	18
KLA	-6.7%	15			
Lam Research	<b>-5.1%</b>	13	<b>Assembly:</b>		
Onto Innovation	-11.2%	-	BESI	-8.7%	-
Nikon	<b>-5.2%</b>	-	Kulicke & Soffa	<b>-3.5%</b>	11
TEL	-7.3%	-	ASM Pacific Technology	<b>-5.2%</b>	
Veeco Instruments	-12.6%	12			

Above Avg

Top 4-6

Top 1-3

# Electronic Materials Stocks:

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

Weekly Gains			9/2/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
<b>EDA</b>			DNP	-0.4%	-
Cadence	-5.4%	39	DuPont de Nemours	-5.3%	5
Synopsys	-6.9%	37	JSR	-3.7%	-
Ansys	-3.8%	30	Shin-Etsu	-5.3%	-
<b>Electronic Materials</b>			SOITEC	-5.6%	-
BASF	2.1%	2	Tokyo Ohka	-7.0%	-
Entegris	-8.0%	21			

Above Avg
Top 4-6
Top 1-3

TechInsights' EDA Stock Index plunged.

TechInsights' Electronic Materials Stock Index sunk this week, BASF was this week's only winner.

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							
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%
12-Aug-22	79.2	79.6	86.8	91.2	0.3%	-0.6%	1.9%	1.3%	33	22.3%	-22	-17.4%	39.7%	89.8	3.3%
19-Aug-22	76.4	77.0	85.1	88.0	-3.6%	-3.3%	-1.9%	-3.6%	9	17.4%	-46	-8.1%	25.5%	88.7	-1.2%
26-Aug-22	73.1	74.0	83.1	83.9	-4.3%	-3.9%	-2.3%	-4.7%	2	1.1%	-53	-17.8%	18.9%	85.1	-4.0%
02-Sep-22	69.2	68.4	79.6	79.4	-5.4%	-7.5%	-4.1%	-5.4%	1	2.1%	-54	-16.1%	18.2%	82.3	-3.3%

# Links to Conference Call Transcripts

**September 2<sup>nd</sup>**

[Broadcom Inc. \(AVGO\) Q3 2022 Earnings Call Transcript](#)

[Micron Technology, Inc. \(MU\) Presents at Deutsche Bank 2022 Technology Conference \(Transcript\)](#)

[ON Semiconductor Corporation \(ON\) Deutsche Bank 2022 Technology Conference \(Transcript\)](#)

[Intel Corp \(INTC\) Deutsche Bank Technology Conference Transcript](#)

[Western Digital Corporation \(WDC\) Deutsche Bank 2022 Technology Conference \(Transcript\)](#)

**August 26<sup>th</sup> and before**

[NVIDIA Corporation \(NVDA\) CEO Jensen Huang on Q2 2023 Results - Earnings Call Transcript](#)

[Applied Materials, Inc.'s \(AMAT\) CEO Gary Dickerson on Q3 2022 Results - Earnings Call Transcript](#)

[Synopsys, Inc. \(SNPS\) CEO Aart de Geus on Q3 2022 Results - Earnings Call Transcript](#)

[Analog Devices Inc. \(ADI\) CEO Vincent Roche on Q3 2022 Results - Earnings Call Transcript](#)

[Agilent Technologies, Inc. \(A\) CEO Mike McMullen on Q3 2022 Results - Earnings Call Transcript](#)

[SkyWater Technology, Inc. \(SKYT\) CEO Thomas Sonderman on Q2 2022 Results - Earnings Call Transcript](#)

[Magnachip Semiconductor Corporation \(MX\) CEO YJ Kim on Q2 2022 Results - Earnings Call Transcript](#)

[ACM Research, Inc. \(ACMR\) CEO David Wang on Q2 2022 Results - Earnings Call Transcript](#)

[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](#)

# Links to Conference Call Transcripts

[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](#)

[STMicroelectronics N.V. \(STM\) CEO Jean-Marc Chery on Q2 2022 Results - Earnings Call Transcript](#)

[ASE Technology Holding Co., Ltd. \(ASX\) Q2 2022 Results - Earnings Call Transcript](#)

[Cohu, Inc. \(COHU\) CEO Luis Müller on Q2 2022 Results - Earnings Call Transcript](#)

[KLA Corporation \(KLAC\) CEO Rick Wallace on Q4 2022 Results - Earnings Call Transcript](#)

[MKS Instruments, Inc. \(MKSI\) CEO John Lee on Q2 2022 Results - Earnings Call Transcript](#)

[Samsung Electronics Co., Ltd. \(SSNLF\) Q2 2022 Results - Earnings Call Transcript](#)

[FormFactor, Inc. \(FORM\) CEO Michael Slessor on Q2 2022 Results - Earnings Call Transcript](#)

[Lam Research Corporation \(LRCX\) CEO Tim Archer on Q4 2022 Results - Earnings Call Transcript](#)

[QUALCOMM Incorporated \(QCOM\) CEO Cristiano Amon on Q3 2022 Results - Earnings Call Transcript](#)

[MaxLinear, Inc. \(MXL\) CEO Kishore Seendripu on Q2 2022 Results - Earnings Call Transcript](#)

[Camtek Ltd \(CAMT\) CEO Rafi Amit on Q2 2022 Results - Earnings Call Transcript](#)

[Teradyne, Inc. \(TER\) CEO Mark Jagiela on Q2 2022 Results - Earnings Call Transcript](#)

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[United Microelectronics Corporation \(UMC\) Management on Q2 2022 Results - Earnings Call Transcript](#)

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