

SEMICON[®] West2014



SEMICON[®] West 2014 Post Show Report

July 8–10, 2014

Moscone Center, San Francisco, California

2014 Highlights:

- Unique SEMICON West International Visitor attendance grew 21% over 2013, accounting for 15% of total visitors
- New technology and business conferences: the *Semiconductor Technology Symposium (STS)* and the *Sustainable Manufacturing Forum*
- R&D programs addressing critical technology issues and opportunities (including IoT, R&D collaboration, compound semiconductors, and silicon photonics) attracted capacity crowds
- *2nd Silicon Innovation Forum*—Connecting innovative start-ups and investors
- Featured Keynotes:
 - Mark Adams, Micron
 - Dr. Bob Metcalfe, University of Texas
 - Sanjay Ravi, Microsoft Corporation

“SEMICON West proved to be a great investment. As a first time exhibitor, we were able to get our company name and capabilities recognized by key customers. We will definitely be back next year!”

Liz Soriano
Teksoft, Inc.

Attendance

Total Attendance (Visitors and Exhibitors)*	26,140
Total Verified Visitors*	17,473

* SEMICON West and Intersolar North America

Exhibitor Information

Total SEMICON Exhibiting Companies	699
Total Net Exhibit Area	127,586 sq. ft.

International Attendance

Total Intl. Verified SEMICON Visitors: (15% of verified unique SEMICON Visitors)	1,567
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Major Countries Represented (Percent of International Visitors)

Japan	25%	United Kingdom	4%
South Korea	17%	Canada	3%
Taiwan	9%	Israel	3%
Mainland China	7%	France	2%
Germany	6%	Netherlands	2%
Singapore	6%		

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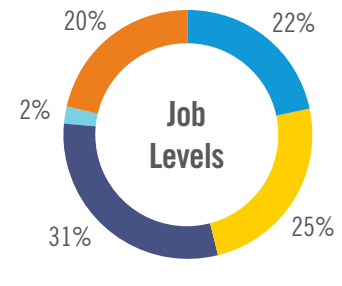
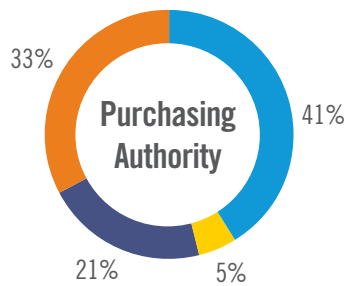
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Visitor Profile

SEMICON West attracts a highly influential audience from every segment and sector of the global microelectronics industries, including semiconductors, solar/PV, LEDs, MEMS, printed/flexible electronics, and other adjacent markets.

Influential Buyers



- 33% Final Decision Maker
- 41% Recommend/Evaluate/Consult
- 5% Specify
- 21% No Role/Other

- 20% Executive Management
- 22% Senior Management
- 25% Other Management
- 31% Non-management
- 2% Other

Focus on Engineering

SEMICON West attracts a highly skilled and technology-focused audience, with 41% of visitors representing engineering and product management job functions.

Primary Job Functions

Research and Development	11%
Manufacturing Engineering/Operations Management	8%
Design Engineering (incl. Software, Systems, Test, Hardware)	7%
Product Management/Engineering	7%
Fabrication and Process Engineering	3%
Assembly/Packaging Engineering	2%
Quality Assurance and Test Engineering	2%
Facilities Engineering/Engineering Support	1%
Marketing/Sales/Business Development	27%
Executive Management/Board Member	16%
Purchasing/Procurement	4%
Manufacturing and Production	3%
Financial/Industry Analyst	3%
Manufacturing Agent/Representative	1%
Training	1%
Environment/Health & Safety	1%
Government/Public Policy	1%
Human Resources Management	1%
Other	4%

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Areas of Interest

SEMICON West visitors are interested in a broad range of industries, technologies, and products from across the supply chain, from design to final manufacturing.

MANUFACTURING

Semiconductor Device Manufacturing (IDM, foundry)	28%	Electronic Manufacturing Services (EMS)	17%
Assembly and Test Services	20%	Fabless Semiconductor Manufacturer / Design Services	12%

MANUFACTURING EQUIPMENT

Wafer Processing/Front-end Manufacturing Equipment	55%	Assembly and Packaging Equipment	25%
Test Equipment	28%	Flat Panel Display Manufacturing Equipment	17%
Inspection and Measurement/Metrology Products	27%	Secondary Equipment and Services	8%
Thin Film Manufacturing Equipment	26%	Other Equipment	11%

MATERIALS

Wafers and Substrates	36%	Assembly and Packaging Materials	20%
Process Materials	28%	Test Materials	16%
Chemicals and Solids	20%	Gases	12%
		Other Materials	9%

COMPONENTS/SUB-SYSTEMS/SOFTWARE

Components, Parts and Accessories	11%	Software—Electronic Design (EDA)/ Silicon Intellectual Property (IP)	8%
Factory Control Automation/Facilities	11%	Optical Interconnect/Photonics	6%
Sub-systems	10%	Abatement Systems/EHS/Safety	3%
Software—Manufacturing/ Factory Automation	9%		

SERVICES/SUPPORT PRODUCTS

Manufacturing Services or Manufacturing Consulting	10%	Support Products (includes consumables)	7%
Business Services or Consulting	7%	Other	2%

Numbers reflect percentages of unique SEMICON visitors



Technology Interests

SEMICON West attracts a diverse range of visitors from across the microelectronics industry with multiple industry and technology interests.

SEMICON West Visitors Technology Interests

Semiconductors	78%
MEMS	35%
LEDs/Solid State Lighting	29%
Photovoltaics/PV	26%
Nano-electronics	25%
Flat Panel Display	23%
Flexible/Printed Electronics	19%
Other	3%

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Key Visiting Companies and Organizations

SEMICON West attracts visitors from around the world and from every major microelectronics company, including buying teams from the world's top capital spending IDMs, foundries, fabless, OSATs, and OEMs.

IDMS/FOUNDRIES

- Cypress
- Fujitsu
- GLOBALFOUNDRIES
- IBM
- IDT
- IM Flash
- Infineon
- Intel
- Micron
- NXP
- Panasonic
- Renesas
- Samsung
- SKHynix
- Spansion
- STMicroelectronics
- TI
- Toshiba
- TSMC
- UMC
- X-Fab

FABLESS/SYSTEM OEMS

- 3M
- Agilent
- Altera
- AMD
- Analog Devices
- Apple
- Atmel
- Avago
- Bloom Energy
- Bridgelux
- Broadcom
- Cisco
- Cree
- CSR
- Fairchild
- Flextronics
- Freescale
- Google
- Hewlett-Packard
- HGST
- Huawei
- International Rectifier
- Intersil
- Jabil
- JDSU
- Lattice Semiconductor
- LG
- Lockheed Martin
- LSI
- Magnachip
- Marvell
- Maxim
- Micrel
- Microsoft Corporation
- Northrop Grumman
- nVidia
- O2 Micro
- ON Semiconductor
- Oracle
- Philips Lumileds
- Qualcomm
- Raytheon
- SanDisk
- Sanmina
- Seagate Technology
- Sony
- Tyco
- Vishay Siliconix
- Western Digital
- Xilinx

OSATs

- Amkor Technology
- ASE
- Siliconware/SPIL
- STATSChipPAC
- Unisem

UNIVERSITIES/RESEARCH

- Arizona State University
- Carnegie Mellon
- cea-Leti
- College of Nanoscale Science and Engineering (CNSE) of the University at Albany—State University of New York (SUNY)
- Columbia University
- Cornell University
- Fraunhofer Institute
- Georgia Tech
- IMEC
- Intermolecular
- Johns Hopkins University
- Kansas State University
- Lawrence Berkeley National Lab
- Lawrence Livermore National Lab
- Oregon State University
- Sandia National Lab
- San Jose State University
- Santa Clara University
- SEMATECH
- Stanford University
- University of California—Berkeley
- University of California—Davis
- University of California—Santa Cruz
- University of Michigan
- University of New Mexico
- University of Texas at Austin
- University of Washington
- Xerox Research Centre of Canada

Premier Sponsors



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Media Partners and Attendees

More than 50 international trade and business publications and more than 100 journalists and industry analysts partnered with SEMI to bring extensive global coverage of news and information about and from SEMICON West and our participating companies.

Media partners and attending publications included:

2014 MEDIA PARTNERS AND ATTENDEES

- 3D InCites
- Adhesives & Sealants Industry (ASI)
- Apptheneum.com
- Association of Vacuum Equipment Manufacturers (AVEM)
- AZoNetwork
- Bodo's Power Systems
- BSN
- Ceramic Industry
- Chip Design Magazine
- Chip Scale Review
- CITEWorld
- Compound Semiconductor
- Controlled Environments
- EDN
- EE Times (UBM)
- Electronic Products (Hearst)
- Envirobeat.com
- Evaluation Engineering
- Extension Media
- Flow Control
- Gases & Instrumentation
- Global LEDs/OLEDs Magazine
- Global SMT & Packaging
- I-Connect 007
- IEEE Spectrum
- IHS Chemical
- IHS Electronics 360
- IOM3/IOM Communications
- JJI PRESS
- LEDs Magazine
- MEMS Journal, Inc.
- MEPTec
- Mergermarket
- MetaWord, Inc.
- Mexico EMS
- Mid-Atlantic Tech Publication
- NASA Tech Briefs
- NP Communications
- Photonics Spectra
- Physics Today
- Pradeep's Point
- Reuters
- Semiconductor Engineering
- Semiconductor Packaging News
- Semiwiki.com
- Silicon Semiconductor
- Solid State Technology
- Sperling Media Group
- TAP Times
- Tech Briefs Media Group
- Techfocus Media
- Trafalgar Publications Ltd.
- U.S. Tech Interactive
- Vacuum Technology & Coating
- Wall Street Journal
- World Journal
- Yole Développement

INVESTORS AND ANALYSTS

- AlixPartners
- AO ASSET MGMT
- Applied Ventures
- Ashfield Capital
- Band of Angels
- B. Riley
- Berenberg
- BIS Research
- Brandes Investment Partners
- Brean Capital, LLC
- Capitol Forum
- Chardan Capital Markets
- Columbia Management
- Coughlin Associates
- Craig-Hallum Capital Group
- Crosslink Capital
- DCM
- Deutsche Bank
- Dow Ventures
- eda 2 asic Consulting, Inc.
- Fortuna Publishing Ltd. (UK)
- Gartner
- Goldman Sachs & Co.
- HSBC
- IDC
- IHS
- Intel Capital
- ISI Group
- ITRI
- Jefferies
- Jefferies LLC
- JETRO San Francisco
- JP Morgan
- Linley Group
- Litchfield Hills Research, LLC
- Mergermarket Group
- Merriman Capital
- Needham & Company, LLC
- Nomura
- phase 4 research
- Piper Jaffray
- Pund-IT, Inc.
- RBC CAPITAL MARKETS
- Robert W Baird & Co.
- Samsung Ventures Investment Corp.
- SemiAccurate
- Semiconductor Advisors, LLC
- SEMICO Research
- Sequoia Capital Global Equities
- SNS Securities
- Sterne Agee
- Summit Research Partners
- Tallwood Ventures
- Techcet Group
- The Linley Group
- TIRIAS Research
- TIRIAS Research
- Topeka Capital Markets
- UBS
- VLSIresearch
- Westwood Marketing, LLC
- Woodside Research
- Ziff Brothers Investments