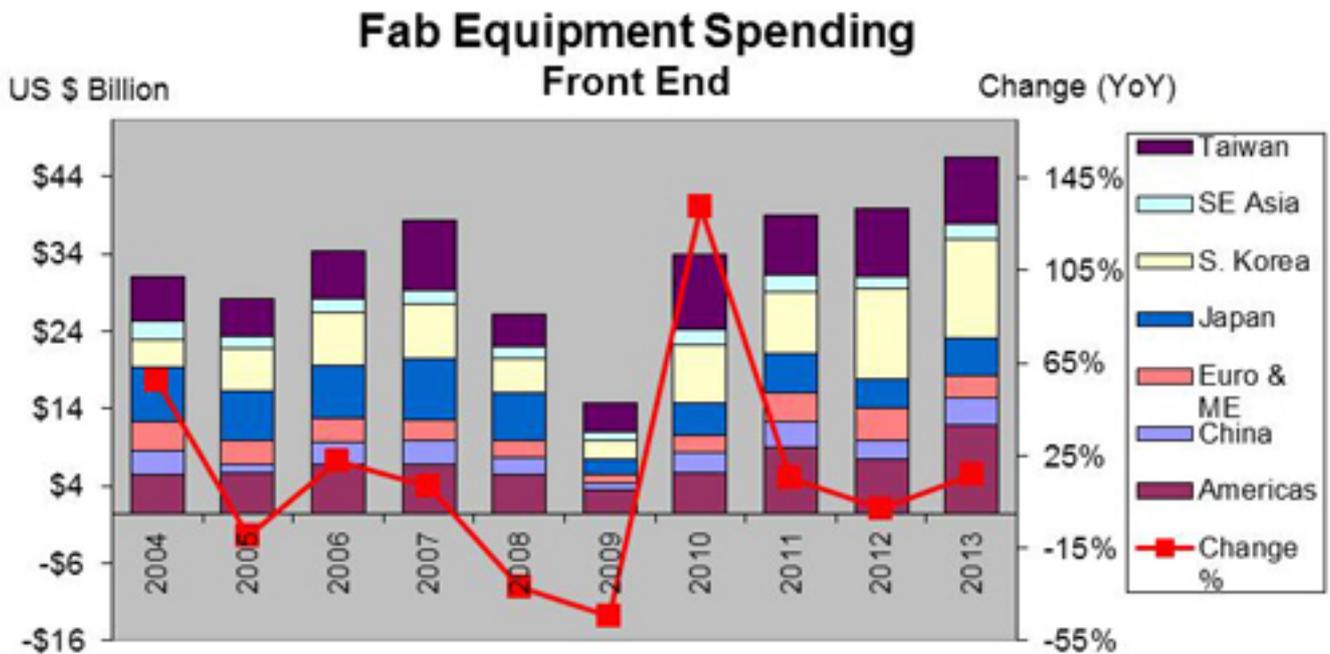


## Fab Equipment Spending: Positive Growth for 2012 and 2013; All-Time Record for 2013

SEMI

Breaking the barrier into positive growth for 2012, the end-of-May edition of the SEMI World Fab Forecast shows improved growth in fab equipment spending this year — at US\$ 39.5 billion, a two percent year-over-year (YoY) increase. For 2013, fab equipment spending is expected to reach an all-time record high, with \$46.3 billion or 17 percent growth from 2012. Even with a small growth rate, 2013 will yield an all-time record high for fab equipment spending, if macro-economic factors do not intervene.

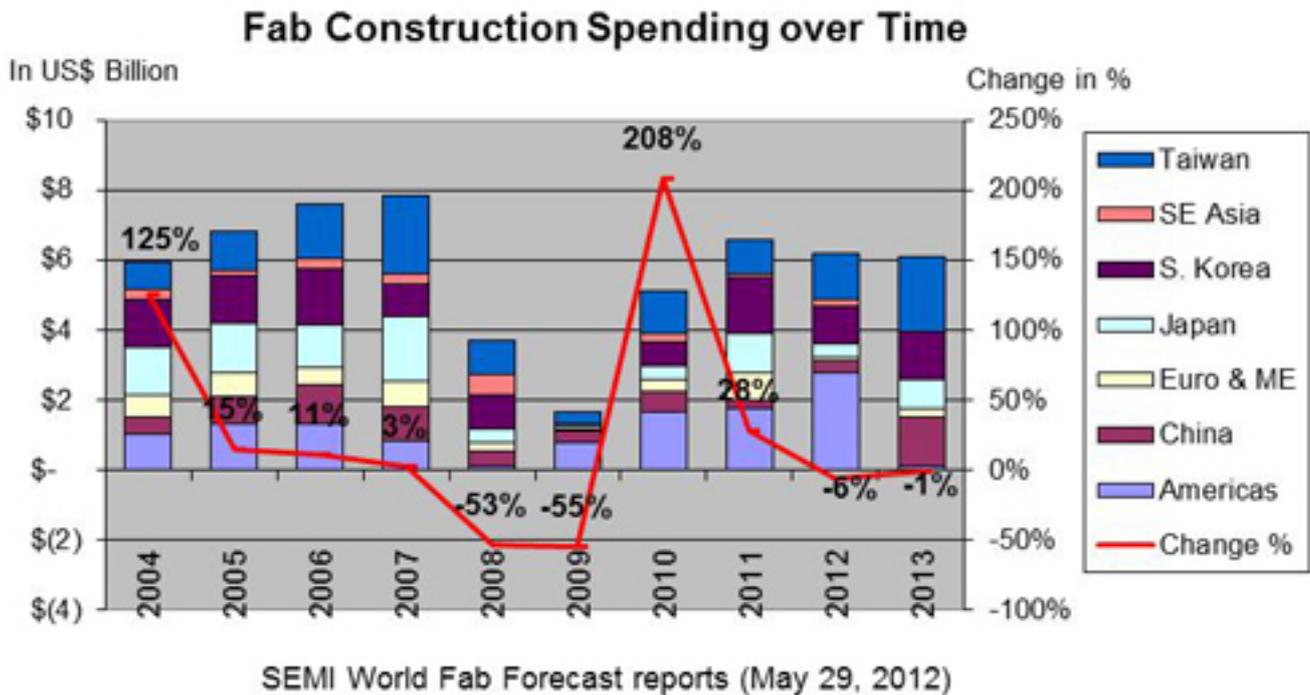


SEMI World Fab Forecast reports (May 29, 2012)

Regions planning to spend the most on fab equipment in 2012 are: Korea (over \$11 billion), Taiwan (\$8.5 billion), and the Americas (\$8.3 billion). In 2013, the largest spending is expected again in Korea (over \$12.5 billion), the Americas (over \$11.5 billion), and Taiwan (over \$8 billion). All product types are increasing equipment spending in 2012 with the largest increase seen in 2012 for Memory and Foundry.

Construction spending has an improved outlook when compared to just a few months ago, with major announcements from Intel, Samsung, SMIC, TSMC, UMC and others. SEMI has identified about 45 planned projects (including new and on-going) in 2012 and 24 planned in 2013. Fab construction spending will drop now only 6 percent in 2012 to \$6.2 billion. Fab construction spending in 2013 is also expected to improve dramatically, with a decline of only about 1 percent to \$6.1 billion, close

to breaking the 0 percent barrier.



In 2012, 11 new fabs will begin construction. In 2013, however, only 7 new fabs will begin construction, though this picture may change the closer we get to 2013.

The combined planned capacity of all new fabs beginning construction in 2012 will be 900,000 wafers per month (in 200mm equivalents). Memory accounts for 60 percent of this capacity, Foundry 20 percent, and System LSI another 20 percent. The new fabs beginning construction in 2013 have a planned capacity for 550,000 wafers per month.

This latest data was published in the May edition of the SEMI World Fab Forecast. Using a bottom-up approach, the quarterly World Fab Forecast report tracks multiple projects in over 1,150 fabs worldwide. Since the February edition, over 340 updates have been made concerning more than 225 fabs, keeping the industry up to date on the ever-changing announcements of spending for fab equipment and construction.

The SEMI World Fab Forecast uses a bottom-up approach methodology, providing high-level summaries and graphs; and in-depth analyses of capital expenditures, capacities, technology and products by fab. Additionally, the database provides forecasts for the next 18 months by quarter. These tools are invaluable for understanding how the semiconductor manufacturing will look in 2011, 2012 and 2013, and learning more about capex for construction projects, fab equipping, technology levels, and products. Learn more about the SEMI fab databases at: <http://www.semi.org/MarketInfo/FabDatabase> [1] and [http://www.youtube.com/user/SEMI\\_mktstats](http://www.youtube.com/user/SEMI_mktstats) [2]

SEMI's Worldwide Semiconductor Equipment Market Subscription (WWSEMS) data tracks only new equipment for fabs and test and assembly and packaging houses. The SEMI World Fab Forecast and its related Fab Database reports track any equipment needed to ramp fabs, upgrade technology nodes, and expand or change wafer size, including new equipment, used equipment, or in-house equipment.

## About SEMI

SEMI is the global industry association serving the nano- and microelectronics manufacturing supply chains. SEMI member companies are the engine of the future, enabling smarter, faster and more economical products that improve our lives. Since 1970, SEMI has been committed to helping members grow more profitably, create new markets and meet common industry challenges. SEMI maintains offices in Beijing, Bengaluru, Berlin, Brussels, Grenoble, Hsinchu, Moscow, San Jose, Seoul, Shanghai, Singapore, Tokyo, and Washington, D.C. For more information, visit [www.semi.org](http://www.semi.org) [3]

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## Links:

- [1] <http://www.semi.org/MarketInfo/FabDatabase>
- [2] <http://www.youtube.com/user/SEMImarktstats>
- [3] <http://www.semi.org/>
- [4] <http://www.semi.org/en/node/mailto:dgeiger@semi.org>
- [5] <http://www.semi.org/en/node/mailto:dtracy@semi.org>