



Semiconductor Biz Insight

Your 5 minute monthly e-link digest brought to you by VLSI Consultancy

June 2011 Issue

Your monthly digest which aims to provide you a round up of the semiconductor headlines with a special focus to the Asian arena - direct to your inbox. Simply click on the relevant links provided to get the details.

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Hi,

A quick download of this month's snippets....

Intel announced that it will introduce the 3D transistor design/Tri-Gate/FinFET into high-volume manufacturing at the 22-nanometer node. TSMC, while acknowledging the advantages of the new design said that it has no plans to implement something similar in the generations to come for lack of an economically viable supporting eco-system. Its 20nm will be planar. AMD and GF have also ruled out following Intel's lead. A question that arises is whether this industry lead in process technology manufacturing also translate into a game changer for Intel in the Mobile Internet Devices' market.

Nvidia has been basking in some good news this month. Its Q1 results exceeded analysts' forecasts. Armed with its application processor and now baseband controller (thanks to Icera acquisition), it is consolidating in smartphones & tablets.

Equipment maker Applied Materials also posted strong second quarter results (an 85% jump); however it came with tempered growth expectations. Its \$4b Varian acquisition (biggest in the semiconductor equipment market in the past 5 years- and did you know that Applied Materials is the industry's most acquisitive company, with 13 announced deals in that period??) has also led to speculations in further equipment deals – one of them being a potential merger between Lam Research and Novellus.

Continuing on acquisitions, Sarance is the third IP core vendor Xilinx has purchased this year with an eye toward positioning itself as a "one-stop shop" for FPGA-based line card designs targeting 40 Gbps, 100 Gbps, and beyond. It previously bought

Omiino for its Optical Transport Network (OTN) expertise and Modelware for its traffic management and packet processing technology.

From my old domain (yep, ASICs), there is an interesting and bold initiative from Open-Silicon – “On time or on us” - industry’s first money backed design engineering schedules.

On an all-together different note – looks like the guys who coin names for the mobile OS platforms are real foodies – where else do you get this string of Gingerbread, Honeycomb, Ice Cream Sandwich (*Android*).... and now Mango (*Windows Phone 7*)??? ☺

If you have any thoughts on the above and would like to share them with me and your industry colleagues through this e-newsletter, please email me at meenu@asic-vlsi.com.

Have a ravenous month ahead!

Best Regards
Meenu

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LOCAL ASIA-PACIFIC NEWS

[Elpida, PTI, UMC join forces for TSV tech](#)

Source: EE Times – 2nd June 2011

The three companies have finalized a three-way collaboration to deliver 3D IC integration technologies for advanced manufacturing processes including 28nm. The companies said they would make use of Elpida's strengths in DRAM, UMC in logic and PTI in assembly to develop logic-plus-DRAM components.

[Infineon plans to invest over \\$400m in Asian operations](#)

Source: EE Times – 2nd June 2011

The company will likely focus on high powered power transmission and power generation for growth and intends to invest more than US\$70 million in Singapore alone for production capacity expansion and R&D activities.

[Mediatek partners with Yahoo](#)

Source: Zacks Equity Research – 1st June 2011

The Taiwanese chipmaker has agreed to embed Yahoo services within its chips, as both companies try to grab a share of the smartphone opportunity. Mediatek has developed the Maui Runtime Environment (“MRE”) software, which allows feature phones to download and run applications in a manner similar to a smartphone.

[Vietnam’s engineering curricula receives \\$300k donation](#)

Source: EE Times – 31st May 2011

KEY TAKE-AWAY

From the Asian arena

Investments and activities picked up this month in the region – Infineon’s \$400m investment, \$300k for Vietnam’s engineering curricula, Carsem expanding in Suzhou, Renesas and NI opening offices in India and Vietnam respectively and others.

Q1 results and financial health

Nvidia, Applied Materials reported good results. Marvell missed Wall Street estimates. Hynix may miss analysts’ forecasts for 2nd half operating profit. TSMC, while sticking to its 20% 2011 growth target for the company, reduced the 2011 chip market growth forecast. The industry outlook is wary.

Three test and measurement companies, namely Tektronix, Fluke and Keithley Instruments, have joined Vietnam's Higher Engineering Education Alliance Program (HEEAP) with a \$300,000 donation. The three companies are subsidiaries of Danaher, a Washington, D.C. based science and technology company.

[Intel set to cash in on Reserve Bank of India's financial inclusion plan](#)

Source: Indian Express – 30th May 2011

Intel sees big opportunity in RBI's financial inclusion programme and is all set to launch its Universal Handheld Device (UHD) for banking operations by the end of this year. UHD is a compact instrument with seven inch screen and a biometric finger print readers along with a thermal printer, which can be used by business correspondents hired by banks to take banking to rural and remote areas of the country.

[Fujifilm Electronic Materials joins Sematech's resist Materials and Development centre](#)

Source: Euroasia Semiconductor – 24th May 2011

As a resist member of Sematech's lithography program, Fujifilm will collaborate with Sematech engineers on critical resist issues in extreme ultraviolet (EUV) lithography. Specific areas include reduction or elimination of line edge roughness (LER) in images below 22nm; ultimate resolution of new resists; and testing imaging materials for EUV sensitivity.

[Carsem expands MLP/QFN capacity in Suzhou](#)

Source: Electroiq – 24th May 2011

Once completed, the Suzhou expansion will bring Carsem's total MLP manufacturing capacity in their Ipoh, Malaysia and Suzhou, China factory locations to over 26 million units per day.

[New SIPLACE branch in Korea](#)

Source: Jade Kellard, Global SMT & Packaging – 23rd May 2011

Following the successful integration into the ASMPT group, branch offices under ASM AS Singapore have been set up in Korea, Malaysia and Taiwan.

[Oki joins FRAM race](#)

Source: Richard Wilson, Electronics Weekly – 20th May 2011

Oki is offering first samples of different devices with serial (I2C or SPI) or parallel interface are already available to evaluate the new parts. Mass production is scheduled for the third quarter 2011.

[NI opens R&D office in Vietnam](#)

Source: Colin Holland, EE Times – 15th May 2011

The company is optimistic about the Vietnam market over the next five years, focusing on sectors such as oil and gas, manufacturing, building and infrastructure

Rankings

From IC Insights' semiconductor supplier ranking – Intel retained top spot as well as extended its lead over Samsung. Among the top 20 suppliers, only seven companies outperformed the total worldwide semiconductor industry Q1 2011/Q1 2010 growth rate of 10%. Of the top seven performers, there was only one memory producer-Samsung.

Acquisitions

Some of them include – Toshiba/Landis+Gyr, Xilinx/Sarance, Rambus/Cryptography Research, Cadence/Altos, Applied Materials/Varian, Broadcom/SC Square, Nvidia/Icera

and automotive. The company is also looking to boost its collaborations with academic and research organizations.

[Huawei bags MobileOne Singapore LTE network deal](#)

Source: Benny Har-Even, Telecoms – 13th May 2011

Singaporean operator M1 has announced the deployment of the market's first commercial LTE network. Huawei is the winner of the contract to provide the core network infrastructure, with a five-year deal worth S\$280m (US\$225.4). This will include installation of macro base stations, distributed base stations and Evolved Packet Core (EPC).

[VIA produces low power Quad processor](#)

Source: Chandler Harris, Information Week – 12th May 2011

The VIA QuadCore processor, which is aimed at mainstream laptops and desktops, runs at 1.2 GHz and uses about 27.5 watts of power. However, even with an energy-efficient chip, VIA has an uphill battle with rivals Intel and AMD.

[Samsung announces 20nm DDR 2.0 Nand chip production](#)

Source: Techeye.net – 12th May 2011

It claims the MLC chip can turn data out at bandwidth of 400 Mbps, 10 times faster than the 40Mbps SDR NAND flash that is doing the rounds at the moment. The chip is 20-nanometre class. Samsung hopes that it will find its way into the next generation of smartphones as well as SATA 6Gbps SSDs.

[TSMC joins Sematech to accelerate technology development](#)

Source: Reuters – 11th May 2011

TSMC will join Sematech to collaborate on semiconductor research and development for IC process technologies for 20nm generation and beyond, including extreme ultra-violet (EUV) lithography, 3D interconnects, metrology, novel materials and device structures, and to develop critical infrastructure vital for next-generation manufacturing, including the transition to 450 mm wafer size.

[Renesas Mobile inaugurates its Bangalore R&D centre](#)

Source: Global SMT & Packaging South East Asia – 11th May 2011

The opening of the R&D centre is an important step for Renesas Mobile, and underlines the opportunities Renesas Electronics and Renesas Mobile Corporation see in India. Renesas Mobile started operations on December 1, 2010 with the completion of Renesas Electronics acquisition of the Wireless Modem group of Nokia.

[TSMC to spin off its SSL business](#)

Source: LEDs Magazine – 3rd May 2011

The Board of Directors of TSMC has approved a proposal to transfer the company's solar business and its solid-state lighting (SSL) business into two newly-established,

wholly-owned subsidiaries.

[LG Display, Cree part ways over LED chips](#)

Source: Kim Yoo-Chul, Korea Times – 3rd May 2011

LG Display has terminated its contract with Cree for light-emitting diode (LED) chips used for the former's flat-screen products. As part of LG Display's strategy to diversify its procurement channels for LED chips and LED-related businesses, it has also been running a joint venture with Taiwan's Amtran Technology and the LED packaging house of Everlight Electronics China.

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INDUSTRY HEADLINES

[Broadcom ignites innovation with PC industry's first 40nm Wi-Fi and Bluetooth combo chip](#)

Source: TMCnet – 30th May 2011

The combo chip supports a variety of platforms including next generation Windows® and Android-based systems.

[Open-Silicon introduces On Time or On us program](#)

Source: PRNewswire – 27th May 2011

Open-Silicon has introduced the semiconductor industry's first money backed design engineering schedules. The company will meet the schedule delivering a prototype on time

[Intel rewrites Atom roadmap](#)

Source: Rick Merritt, EE Times – 17th May 2011

In its latest effort to drive its x86 chips into smartphones and tablets and counter mounting competition from ARM based chips, Intel will quicken the pace at which it rolls out new Atom core designs, drive down the target power of its notebook chips and expand the thermal range of its SoCs.

[Cadence unveils online EDA store](#)

Source: EFY Times – 16th May 2011

By providing all the necessary resources to take a design from concept to final board implementation, the new OrCAD Capture Marketplace provides access to a rich design ecosystem in a new delivery model.

[TSMC does not see triple gate transistors as economically viable solution](#)

Source: Anon Shiloy, Xbitlabs – 11th May 2011

TSMC said that while Intel's 22nm manufacturing technology with tri-gate

transistors has a number of advantages, it has no plans to implement something similar in the generations to come. "We need the ecosystem to be ready for FinFETs, which means design tools, IP, design kits and so on. For us 20-nm will be planar," said Maria Marced, president of TSMC Europe.

[Marvell tips 10Gbase-T PHYs](#)

Source: Dylan McGrath, EE Times – 11th May 2011

As expected, Marvell has entered the market for 10GBase-T physical layer (PHY) chips, introducing two devices that the company said were designed to offer breakthrough benefits to switch, server and storage customers.

[New technology integrates phone antennas into decorative films](#)

Source: Doug Smock, Design News – 10th May 2011

In future devices, the number of antennas could grow to 16 to cover bandwidths such as GSM, UMTS, Bluetooth, and Wi-Fi, as well as RFID for near-field communication applications – all contained within a shrinking space. Bayer Material Science has developed and applied for a patent on a technology in which polymer electronics are printed on polycarbonate films already used to decorate phones.

[Solarflare's 10Gbase-T line bought by Marvell](#)

Source: ELPort.News – 11th May 2011

The player in high-performance, low-latency 10 Gigabit Ethernet (10GbE) server adapters and software announced its exit from the physical layer (PHY) business through the sale of the company's 10GBASE-T assets to an unnamed merchant semiconductor company, reportedly Marvell.

[Global Android market share increases to 35% in Q1](#)

Source: Telecom Paper – 5th May 2011

Android led the global smartphone market for the second quarter running, with 35.7 million units shipped in the first quarter increasing its share to 35 per cent, according to a study by Canalys. At the same time, APAC became the largest smartphone market region, with year-on-year growth of 98 per cent to 37.3 million units, putting it ahead of EMEA for the first time since Q3 2007

[Intel unveils 3-D chip technology](#)

Source: Sacramento Business Journal – 4th May 2011

Intel said it will introduce the 3-D transistor design called Tri-Gate into high-volume manufacturing at the 22-nanometer node in an Intel chip codenamed "Ivy Bridge".

[Aixtron reports continued revenue growth in LED equipment](#)

Source: LEDs Magazine – 4th May 2011

Aixtron saw its revenue grow by a third in the first quarter of 2011, and believes it is well placed to benefit from on-going LED industry expansion in China.

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FINANCIAL WATCH

[MStar shares boosted by buyback plan](#)

Source: Focus Taiwan – 1st June 2011

Triggered by the company's announcement that it will buy back 6 million shares at NT\$200-300 each, shares of integrated circuit designer MStar Semiconductor rose sharply the next morning.

[Hynix says second-half earnings may miss estimates as chip demand slows](#)

Source: Jun Yang, Bloomberg – 1st June 2011

The company may miss analysts' forecasts for second-half operating profit as demand for memory chips slows.

[Marvell results miss estimates; shares tumble](#)

Source: CNBC – 26th May 2011

Sales for the most recent quarter reached \$802.4 million, down from \$856 million last year.

[Applied Materials profit jumps 85% but outlook weak](#)

Source: Shara Tibken, Fox Business – 24th May 2011

The semiconductor equipment company said its growth expectations have been tempered by near-term economic conditions, including inflation in emerging markets, unrest in the Middle East and the disaster in Japan.

[Fab tool book-to-bill ratio up in April](#)

Source: EE Times – 19th May 2011

The April bookings figure is 1.1 per cent more than the March level of \$1.58 billion, and is 10.8 per cent above the \$1.44 billion in orders posted in April 2010, SEMI said.

[Intel remains "firmly in control" of top semiconductor supplier sport – IC Insights](#)

Source: Suzanne Deffree, EDN – 19th May 2011

According to the market research company, Intel showed 25% Q1 year-over-year growth for the quarter. That growth was matched by only one other company on IC Insights list of the top 20 suppliers: Broadcom, which ranked 11th with approximately \$1.75 billion in sales. Number two ranked Samsung showed 15% Q1 year-over-year growth.

[Abu Dhabi's ATIC investing in chip plant, sees acquisitions](#)

Source: Anthony DiPaola, Bloomberg – 18th May 2011

GlobalFoundries will invest about \$5.5 billion this year, almost double last year's

outlay, to expand plants in Singapore, Dresden and New York state. ATIC's share of the spending will be about \$3 billion. As the Abu Dhabi investor continues to spend, it will raise its stake in GlobalFoundries to 90 per cent by the end of the year and increase it later to as much as 95 per cent, said Daniel Durn, ATIC's executive director of investments and strategy.

[Nvidia's Q1 results exceed analysts' forecast](#)

Source: EE Times – 17th May 2011

Attributing its remarkable performance to strong sales of Tegra mobile applications processor, Nvidia reported sales for the quarter of \$962 million (up 8.5 per cent from the previous quarter and down 4 per cent from the year-ago quarter) and a net income in accordance with GAAP of \$135.2 million (down from \$171.7 million in the prior quarter and down from \$137.6 million in the year-ago quarter).

[TSMC says Q3 chip prices already fixed](#)

Source: Reuters – 17th May 2011

The comments came after Taiwan's Economic Daily newspaper reported that TSMC was in talks with clients to lower prices by 3-5 per cent in the third quarter.

[TSMC reduces 2011 chip market growth forecast](#)

Source: EE Times – 13th May 2011

While still thinking that the foundry chip market can grow 11 per cent in 2011 and expecting itself to outgrow that sector by sticking to its 20 per cent 2011 growth target, the foundry giant now projects a 2 per cent growth for the worldwide semiconductor market in 2011, down from its original forecast of 4 per cent

[Conexant Holdings announces investment from August Capital](#)

Source: Reuters – 12th May 2011

The newly private chipmaker announced that August Capital has made an investment in the Company. August Capital joins Golden Gate Capital as investors in Conexant.

[Freescale plans \\$1 billion IPO](#)

Source: Sinead Carew, Reuters – 10th May 2011

Freescale Semiconductor Holdings aims to raise about \$1 billion in an IPO, returning to the market after a record-breaking 2006 private equity buyout as investor interest in the semiconductor industry grows.

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MERGERS, ACQUISITIONS, JOINT VENTURES, SPIN OFFS AND PEOPLE

[ProMOS sells China 8-inch fab](#)

Source: Simmtester - 24th May 2011

ProMOS Technologies announced the sale of ProMOS (Chongqing) Technologies, its wholly owned subsidiary semiconductor maker located in Xiyong Micro-electronics Industrial Park in Chongqing, western China, including the equipment of a 8-inch fab, to AVIC Systems, a subsidiary of China's state-owned enterprise Aviation Industry Corporation of China (AVIC), at a preliminary price of CNY100 million.

[Rohde & Schwarz and Synopsys form LTE testing alliance](#)

Source: Benny Har-even, Telecoms – 23rd May 2011

Synopsys is providing access to its standards-compliant reference libraries of algorithms for end-to-end simulation of uplink and downlink transmissions over LTE and LTE Advanced, while Rohde & Schwarz is providing signal generators which have been verified against the Synopsys libraries.

[Toshiba buys smart meter maker Landis+Gyr for \\$2.3b](#)

Source: Matthew Lynley – 19th May 2011

While Toshiba is mostly visible as a consumer electronics manufacturer, its Infrastructure Systems Group is actually a large developer and deployer of nuclear power technology. Landis+Gyr builds electricity meters that are capable of wirelessly transmitting energy consumption and pricing data in real time between utilities, their customers and the meters themselves

[Xilinx acquires Sarance Technologies to cap high speed IP core shopping spree](#)

Source: Stephen Hardy, Lightwave – 17th May 2011

The FPGA vendor has snapped up Sarance Technologies, which specializes in Ethernet MAC, Interlaken, and bridging cores, for an undisclosed amount. Sarance is the third IP core vendor Xilinx has purchased this year with an eye toward positioning itself as a “one-stop shop” for FPGA-based line card designs targeting 40 Gbps, 100 Gbps, and beyond.

[Rambus to pay \\$342.5m for Cryptography Research](#)

Source: CBS News – 13th May 2011

Technology licensor Rambus is paying \$342.5 million in cash and stock for Cryptography Research, a privately held chip security research and development and licensing company. Companies that license Cryptography's technologies include Microsoft, Samsung Electronics and Visa.

[SMIC forms JV to build Wuhan fab](#)

Source: Simmtester – 12th May 2011

SMIC has announced it plans to create a joint venture with Hubei Science & Technology Investment Group Co. Ltd. to invest in the Wuhan Xinxin Semiconductor Manufacturing Corp. 300-mm wafer fab. SMIC is undertaking to provide \$1 billion of capitalization to the un-named JV but said that the implementation of the JV may also be dependent on market conditions.

[Epiq buys strengthen IMI's position in automotive segment](#)

Source: ELPort.News – 11th May 2011

Integrated Micro-Electronics (IMI) will purchase three subsidiaries of Epiq, an EMS provider that emphasizes electronic and electro-mechanical systems and subsystems for the automotive and industrial equipment markets.

[Cadence acquires Altos Design Automation](#)

Source: Silicon Valley/San Jose Business Journal – 10th May 2011

Cadence has bought Altos which provides tools to characterize foundation IPs. The EDA vendor said that the offering gives its customers greater visibility into the effects of noise, timing, and power at every phase of the design cycle.

[Nvidia to buy phone chipmaker Icera for \\$367 million](#)

Source: Sinead Carew, Reuters – 9th May 2011

With this deal, Nvidia enters the competitive market for baseband. Its shares rose as much as 2.7 per cent before giving back some of those gains. Buying Icera's technology will let Nvidia package its high-end application processors, which enable features like video on smartphones and tablets, with cell phone communications.

[Broadcom to buy security chip developer SC Square for \\$42m](#)

Source: Yossi Nissan, Globes – 9th May 2011

SC Square is Broadcom's ninth acquisition in Israel and fourth acquisition since October 2010. The company bought semiconductor developer Provigent for 340 million in March 2011, image processing company Sightic Vista for \$10-20 million in November 2010, and femtocell company Percello Ltd. for up to \$98 million in October 2010.

[Applied Materials' Varian purchase may spur equipment deals](#)

Source: Ian King, Bloomberg – 6th May 2011

The \$4.0b purchase by the semiconductor equipment maker may trigger a round of acquisitions in the chip machinery industry. Applied Materials, is paying a 55 per cent premium for Varian, to help regain ground in a business where it had lost market share.

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MARKET OUTLOOK

[Taiwan's chip industry set to be world's largest in 2011](#)

Source: EE Times – 2nd June 2011

As per SEMI, Taiwan will overtake Japan in the No. 1 spot as Taiwan's market grew from \$6.87 billion in 2009 to an estimated \$9.11 billion in 2010, representing a growth rate of 36.2 per cent. Amid this growth, Taiwan's domestic chip industry accounts for nearly half of the market capitalization on the Taiwan Stock Exchange (TSE).

[Potential \\$45b power device market looks to new substrates, packaging, process flows](#)

Source: Dr Paula Doe, SEMI – 24th May 2011

According to HIS iSuppli, alternative energy applications may help drive the power semiconductor market to \$45 billion by 2014. To meet their needs for more efficient high-voltage power management, growing markets like solar generation and vehicle electrification need are looking to GaN and SiC, innovative high-temperature packaging technology, and integrated process flows for integrating high voltage or RF with conventional CMOS.

[In-Stat sees 3G/4G in 78% of tablets by 2015](#)

Source: ELPort.News – 19th May 2011

Also, in 2015, it is projected that over 50 percent of all 3G/4G tablets 2015 will have LTE WAN connectivity and 52 percent of cellular-connected portable and computing devices in Asia will be GSM devices.

[Mobile OS dynamics set to shakeup Apps processor rankings](#)

Source: BusinessWire – 19th May 2011

According to Strategy Analytics, the most successful applications processor vendors are those with a broad portfolio to address multiple smartphone price tiers, and this is likely to continue.

[3D TV set market to grow 500% in 2011](#)

Source: Marketwire – 17th May 2011

"We expect 100% of all 40-inch and above DTV sets will eventually be 3D enabled. This will not only cause shipments of 3D TV sets to increase, but will also grow the number of households worldwide with 3D TV sets. 3D content providers need not worry that consumers will be unable to view their content", said Michelle Abraham of In-Stat.

[Global NFC handset shipments to reach 550m units by 2015](#)

Source: Telecom Paper – 13th May 2011

According to a study by IHS iSuppli, the decision by three major US mobile carriers (AT&T, Verizon and T-Mobile) to partner with credit card companies on a mobile commerce initiative will boost the market for embedded payment technology in mobile phones and this will enable the rise in shipments.

[SEMI forecasts strong growth for APAC chip industry](#)

Source: EE Times – 13th May 2011

Industry forecast for semiconductor revenue growth for 2011 is expected to reach a range of 5 to 10 per cent. With positive demand in the electronics sector, especially for mobile devices, SEMI expects the semiconductor industry to keep continued growth.

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IEWS AND OPINIONS

[NXP's Rick Clemmer: Bright lights, big opportunity](#)

Source: Suzanne Deffree, EDN – 17th May 2011

Rick Clemmer, executive director, president, and CEO of NXP Semiconductors discusses speculation on NXP's future, the company's most recent quarter, and how NXP's NFC (near field communication) strategy is allowing it to shine with major lighting application moves.

[Light, life and LEDs: Taking LEDs beyond lighting](#)

Source: Suzanne Deffree, EDN – 4th May 2011

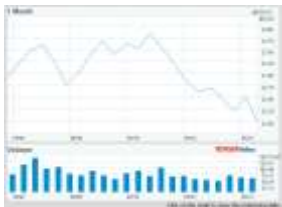
Avnet's Cary Eskow discusses the physiological benefits brought on by emerging uses of LED that could change the game for solid state lighting and make LEDs more than just a light source.

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STOCK WATCH

Source: NASDAQ

1 month chart for Intel, TSMC, TI, Broadcom, STM, Xilinx, KLA-Tencor, Qualcomm, LSI, UMC, Applied Materials, Teradyne, Toshiba and Infineon



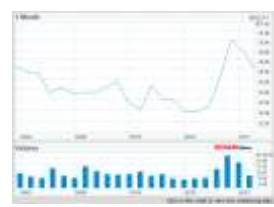
INTEL



TSMC



TI



BROADCOM



STM



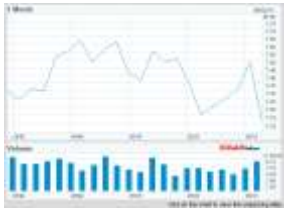
XILINX



KLA-TENCOR



QUALCOMM



LSI



UMC



APPLIED MATERIALS



TERADYNE



TOSHIBA



INFINEON

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