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When will semis recover?

By Mark LaPedus

HALF MOON BAY, Calif. -- Here's the \$64,000 question: When will the global economy--and the electronics industry--recover?

Some say late 2009. Others believe 2010 or 2011. The pessimists claim 2013.

It's hard to say, but one thing is clear: "We are in a deep and protected global slowdown," warned Randy Bane, vice president and chief economist at Applied Materials Inc. (Santa Clara, Calif.). "There is no doubt there will be broad consolidation and restructuring" in the industry.

Bane sees an economic recovery sooner than later. "The recovery (will happen) in late '09 or 2010," he said.

For the semiconductor industry, the first half of 2009 is expected to be weak, "with some recovery in the second half," he said.

At present, the IC forecasts from experts are all over the map, ranging from minus 7.5 percent to minus 15 percent in 2009, according to Bane. Fab equipment could fall between 25-to-45 percent this year, he added.

Jim Feldhan, president of Semico Research Corp., has a slightly different view. "2009 will be a horrible year," he said.

In 2009, the IC industry will fall 5.9 percent, he said. On the other hand, the industry could see select "shortages" this year.

Going forward, there is expected to be a "mild recovery" in 2010, he added. In 2010, Semico projects that the IC industry will grow 7 percent.

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