



## FOUNDRY MARKET TRENDS: NO LONGER "TAIWAN-CENTRIC" THIRD QUARTER 2009

**AUGUST 2009** 

STUDY NUMBER: MA105-09

© Copyright Semico Research, 2009. All rights reserved.
Reproduction in whole or part is prohibited without the express written permission of Semico.
The contents of this report represent the interpretation and analysis of statistics and information that is generally available to the public or released by responsible agencies or individuals, but is not guaranteed as to its accuracy or completeness. The reader acknowledges that they use this information at their own risk.

## **TABLE OF CONTENTS**

Executive Overview	3
Methodology	
Foundry Market Overview	
A Quick Recovery	5
GLÖBALFOUNDRÍES	
Demand-side Overview	11
Foundry Demand by Technology	11
Foundry Demand by Product Type	
Foundry Demand by Company Type	14
Supply-side Overview	16
Appendix A	18
Definitions	

## **LIST OF FIGURES**

Figure 1: Foundry Capacity Utilization	6
Figure 2: 300mm Foundry Wafer Capacity	8
Figure 3: Potential Growth of Common Platform Supply Base	9
Figure 4: Foundry Demand by Technology	11
Figure 5: 2009 Foundry Demand by Product Type	13
Figure 6: Foundry Demand By Company Type	14
Figure 7: Foundry Supply by Technology	16
LIST OF TABLES	
Table 1: Total Industry and Foundry Wafer Demand	6
Table 2: GLOBALFOUNDRIES SWOT Analysis	7
Table 3: Foundry Capital Expenditures	9
Table 4: Foundry Wafer Demand by Technology	12
Table 5: Foundry Wafer Supply by Technology	17