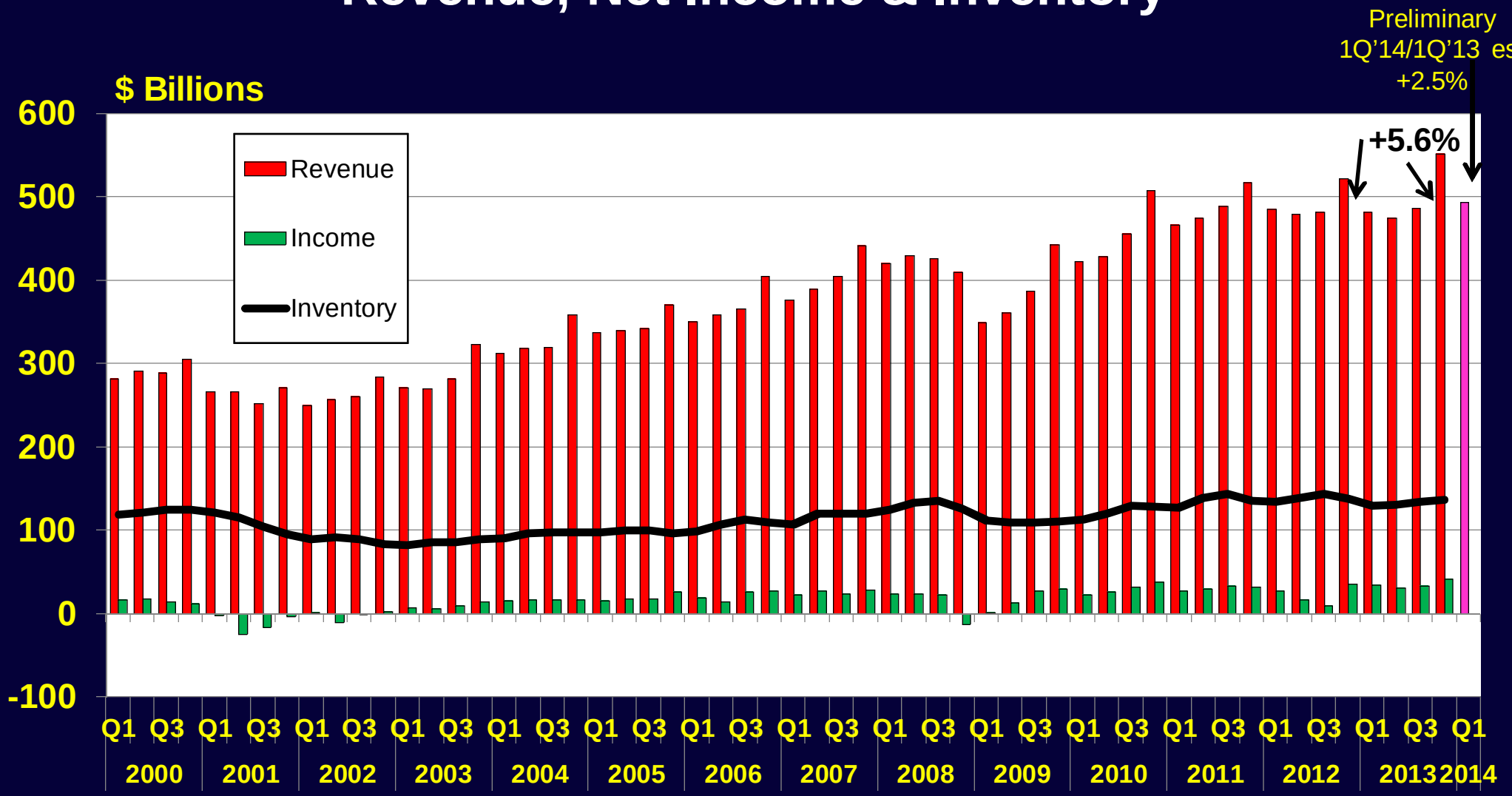
Chart 1

Electronic Equipment Suppliers
Composite of 141 Public Companies
Revenue, Net Income & Inventory



Computer 13, Internet 9, Storage 10, Communication 20, SEMI 20, Medical 23, Instruments 11, Military 6, Business & Office 3, Consumer 13, Automotive 11

Chart 2

Industrial Production – World

% Change vs. One Year Earlier

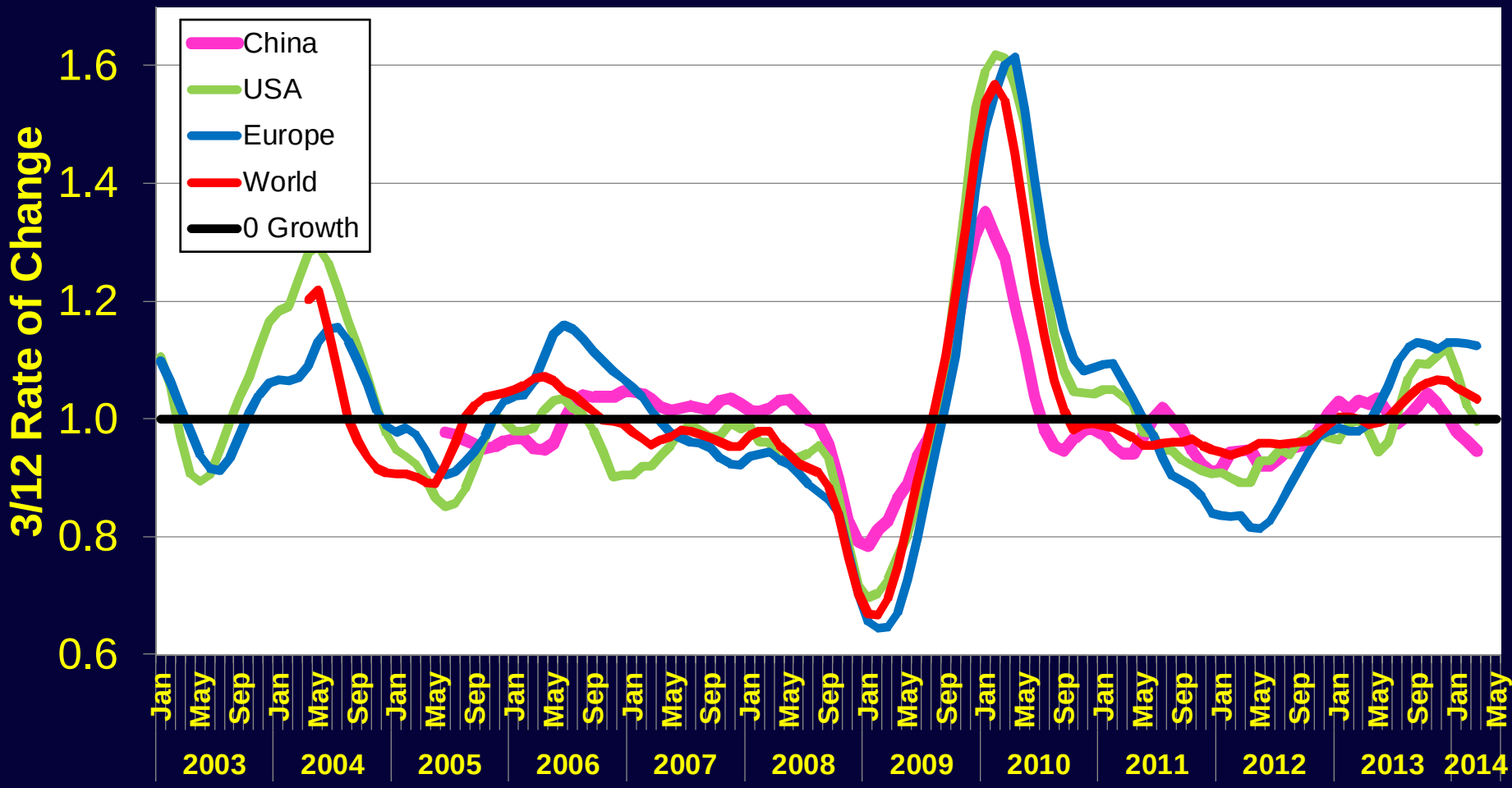
Britain	**+ 2.7 Feb**
Czech Republic	**+ 5.5 Jan**
France	**- 0.8 Feb**
Germany	**+ 4.8 Feb**
Italy	**+ 0.4 Feb**
Netherlands	**+ 5.2 Feb**
Russia	**+ 2.0 Feb**
Spain	**+ 3.2 Feb**
Euro Area	**+ 2.1 Jan**
Canada	**+ 3.4 Jan**
USA	**+ 3.0 Feb**
China	**+ 8.6 Feb**
India	**+ 0.1 Jan**
Malaysia	**+ 6.8 Feb**
Singapore	**+12.8 Feb**
S Korea	**+ 4.3 Feb**
Taiwan	**+ 7.0 Feb**
Thailand	**- 4.4 Feb**
Japan	**+ 6.9 Feb**

www.economist.com + Eurostat

Chart 3

World Purchasing Managers Index

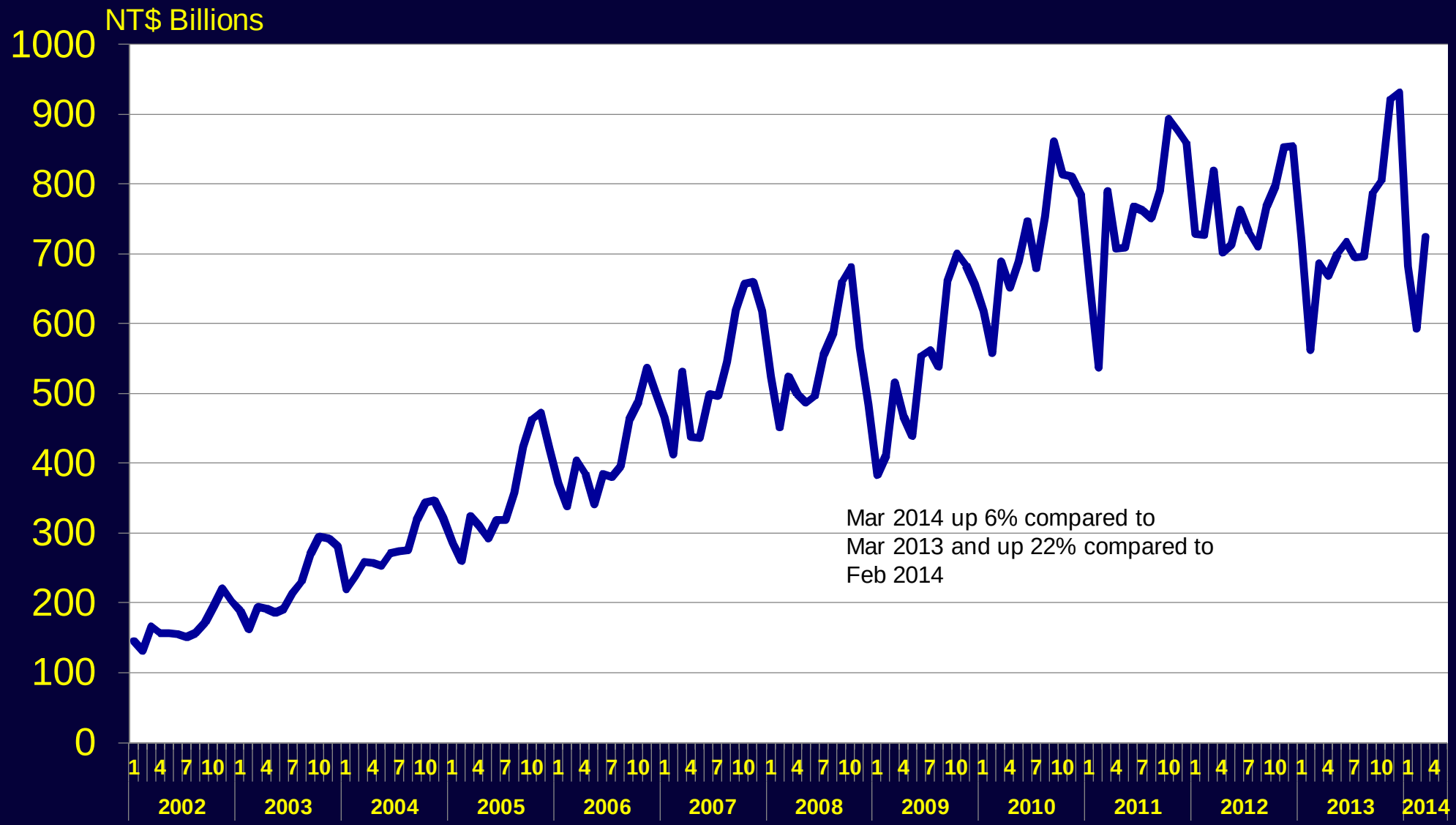
3/12 Rate of Change



ISM, JPMorgan, Markit Economics

Chart 4

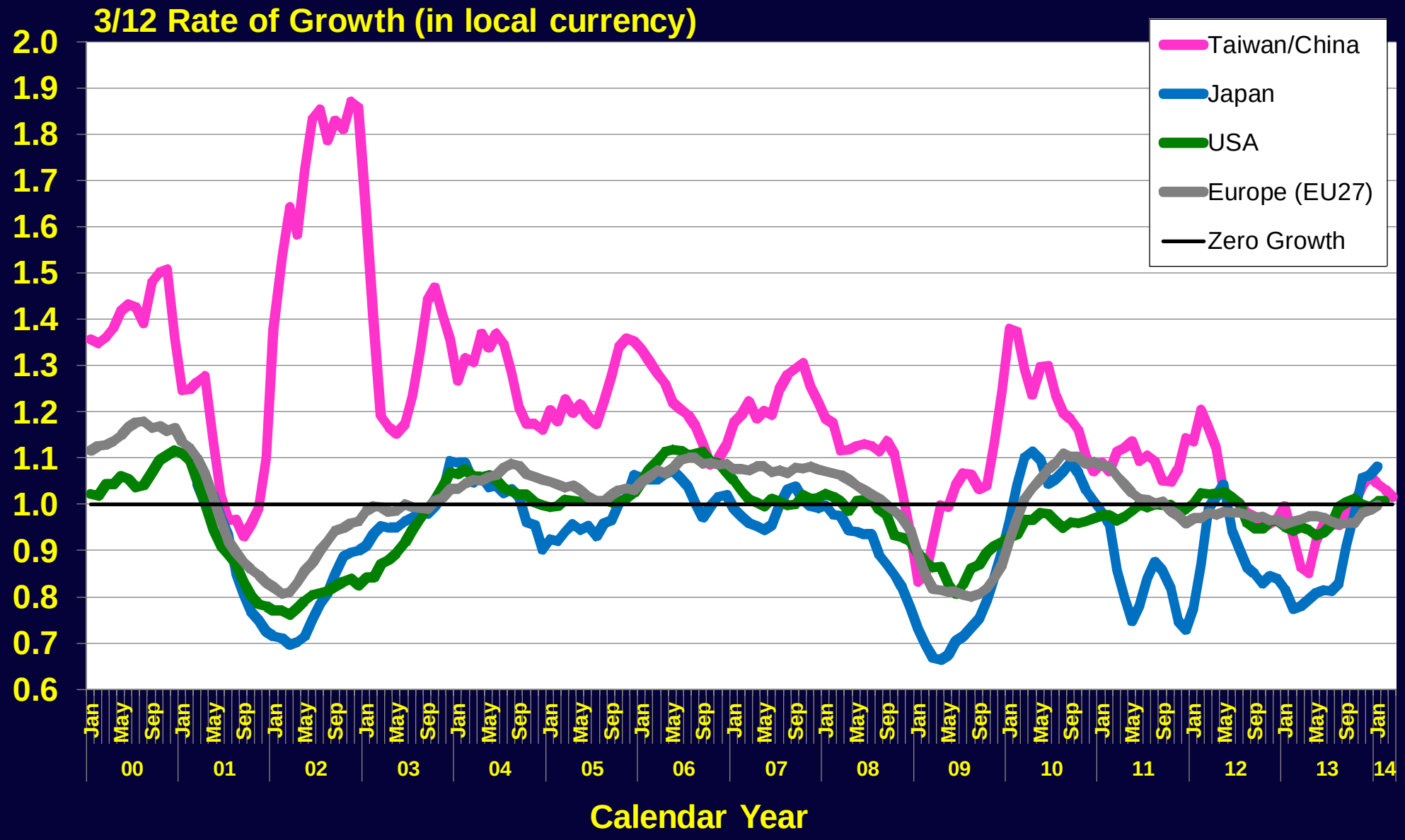
Taiwan/China Electronic Equipment Producers
Composite of 101 Manufacturers
Consolidated Revenue



Taiwan listed companies, often with significant manufacturing in China

Chart 5

Regional Electronic Equipment Shipment Growth

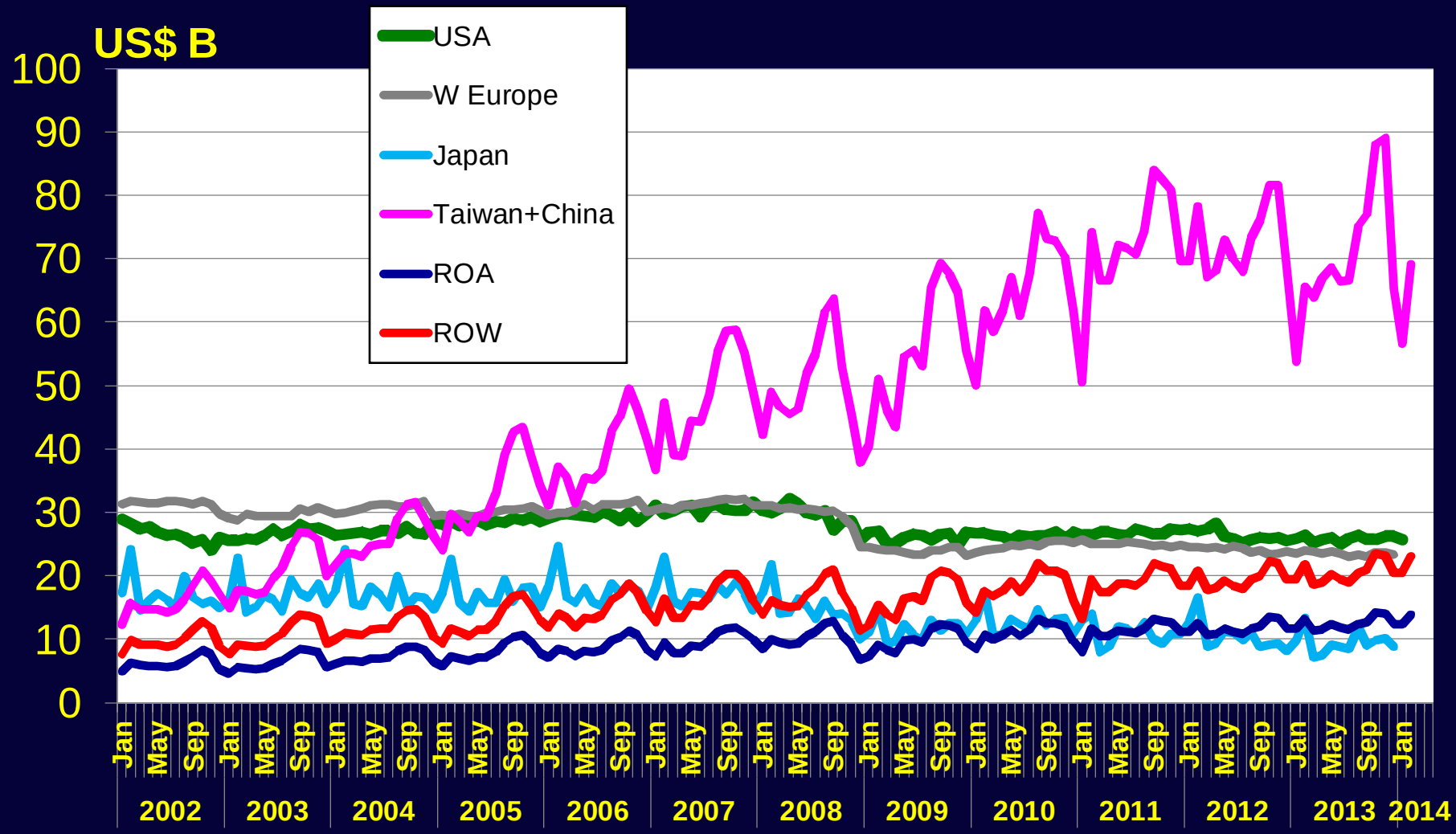


Sources: IPC, JPCA, Taiwan/China composite; Eurostat "wiring devices" for Europe

Chart 6

World Electronic Equipment Monthly Shipments

Converted @ Constant 2012 Exchange Rates

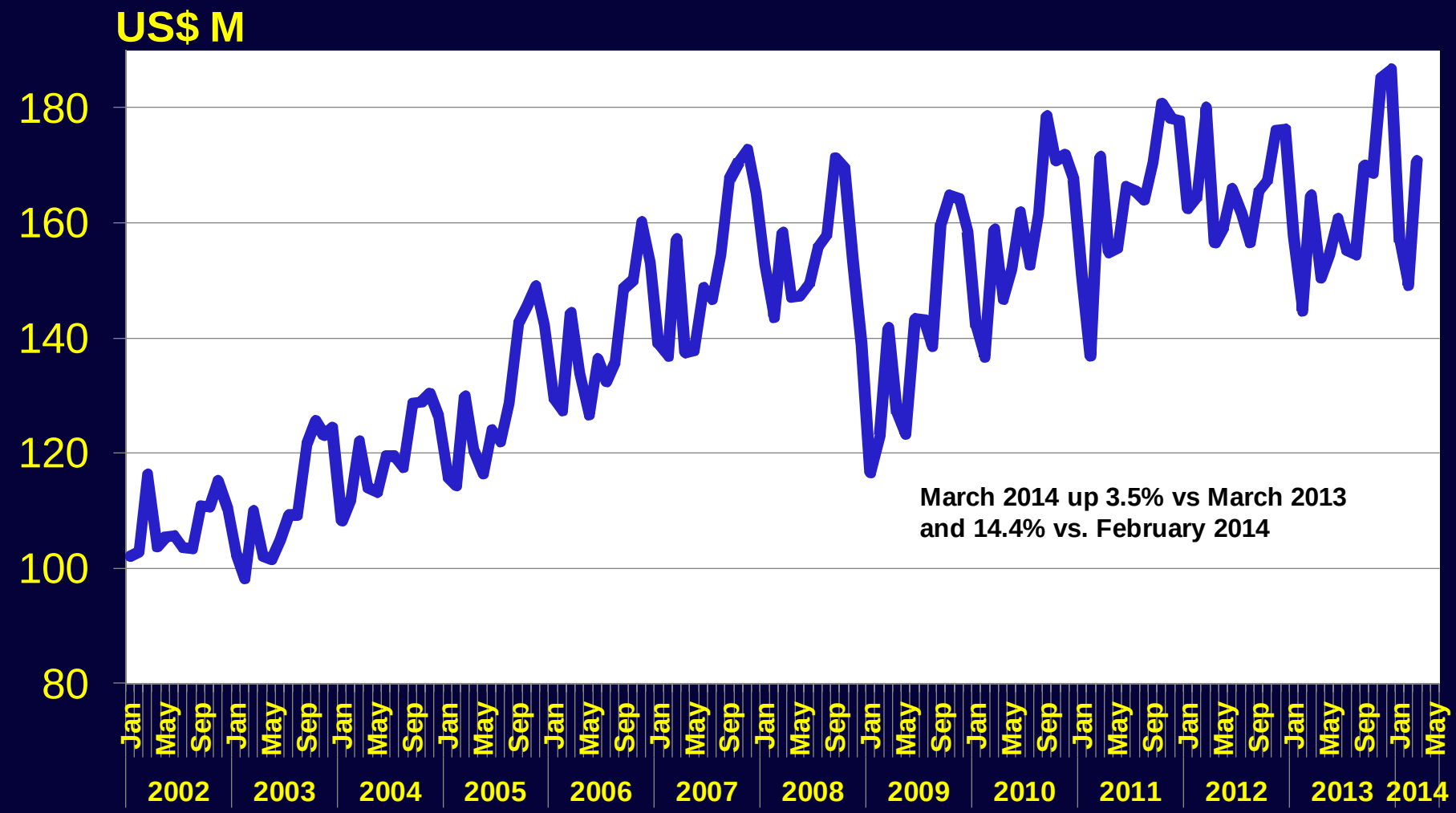


Source: Custer Consulting Group & Electronic Outlook Corp

Chart 7

World Electronic Equipment Monthly Shipments

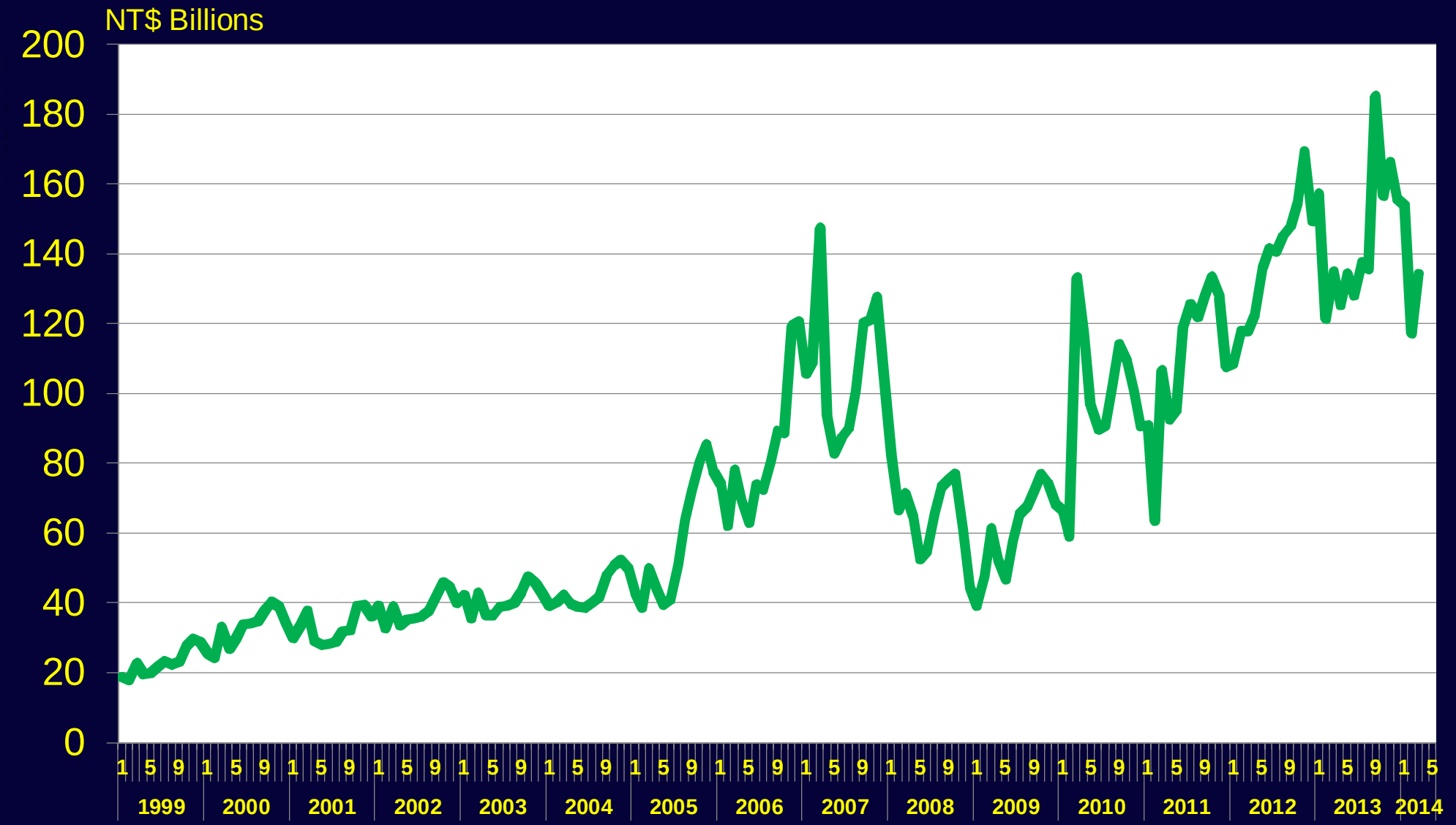
Converted @ Fluctuating Exchange Rates



Source: Custer Consulting Group & Electronic Outlook Corp

Chart 8

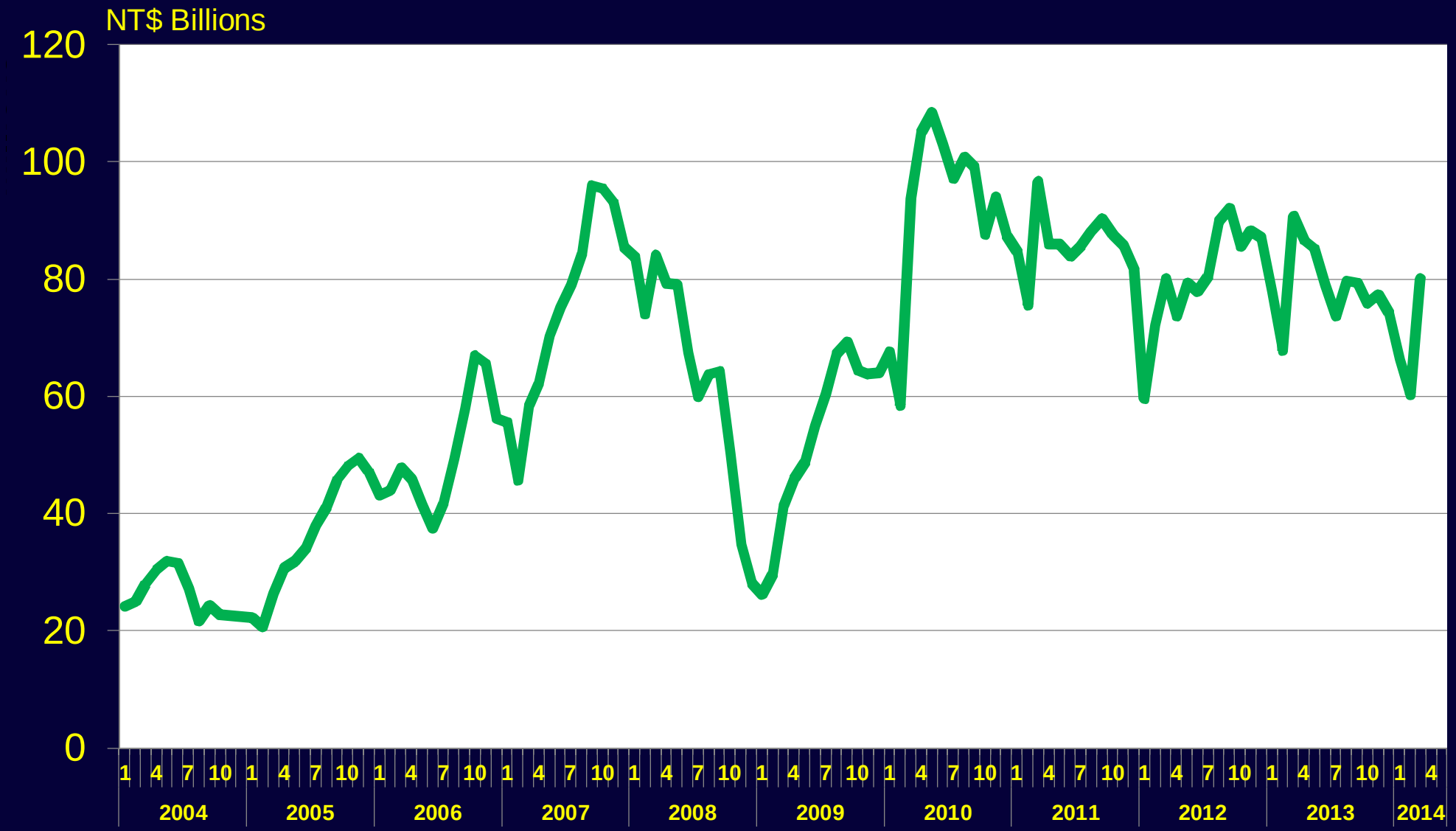
Taiwan/China Motherboard Vendor Sales
Composite of 22 Manufacturers



Taiwan listed companies, often with significant manufacturing in China

Chart 9

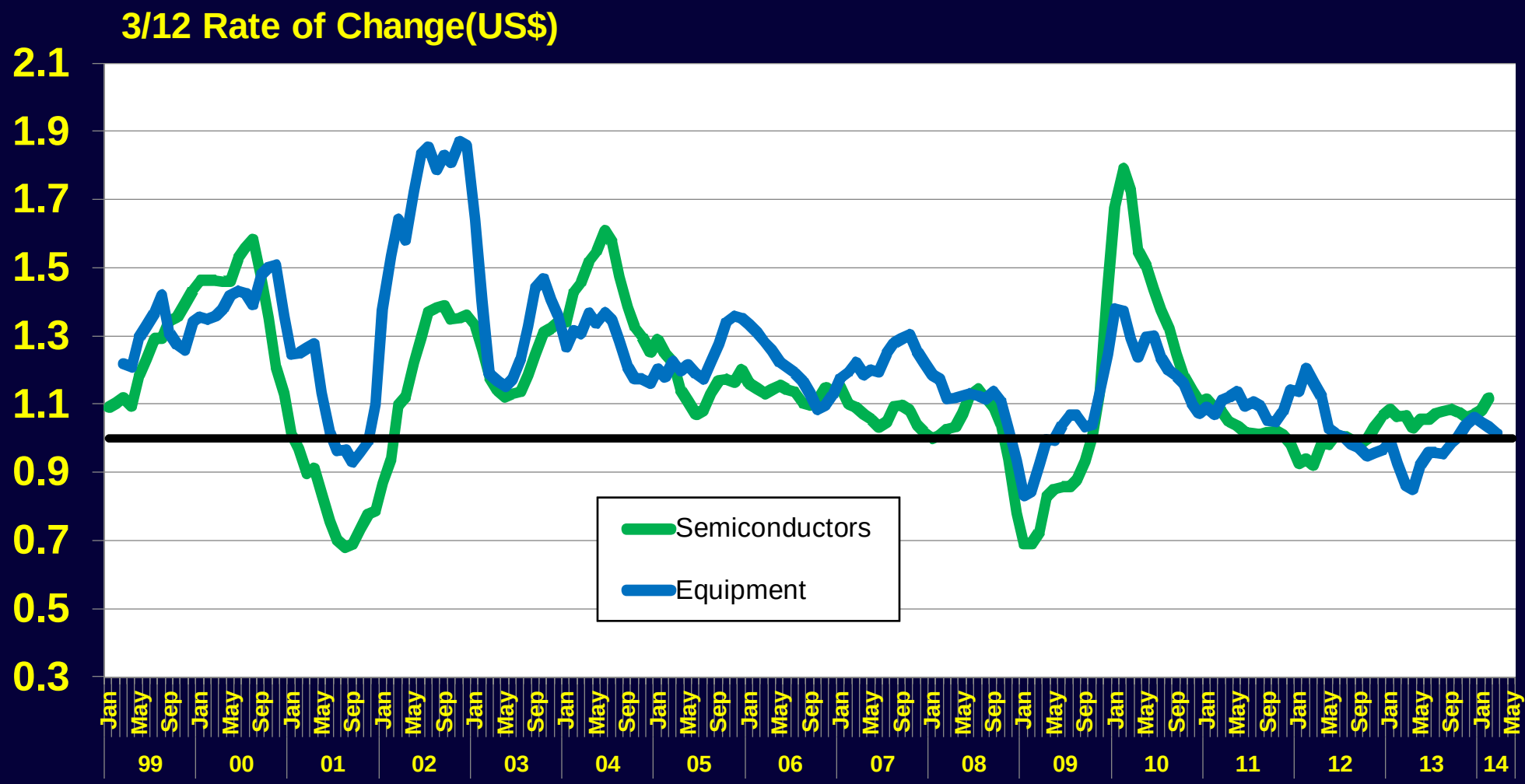
Taiwan Display Producers
Composite of 6 TFT-LCD Panel Manufacturers



Taiwan listed companies, often with significant manufacturing in China

Chart 10

Semiconductor Shipments to SE Asia vs. Taiwan/China Electronic Equipment Production



Total $ Semiconductor Shipments from All Countries to SE Asia www.sia-online.org/
101 Taiwan listed companies, often with significant manufacturing in China

Chart 11

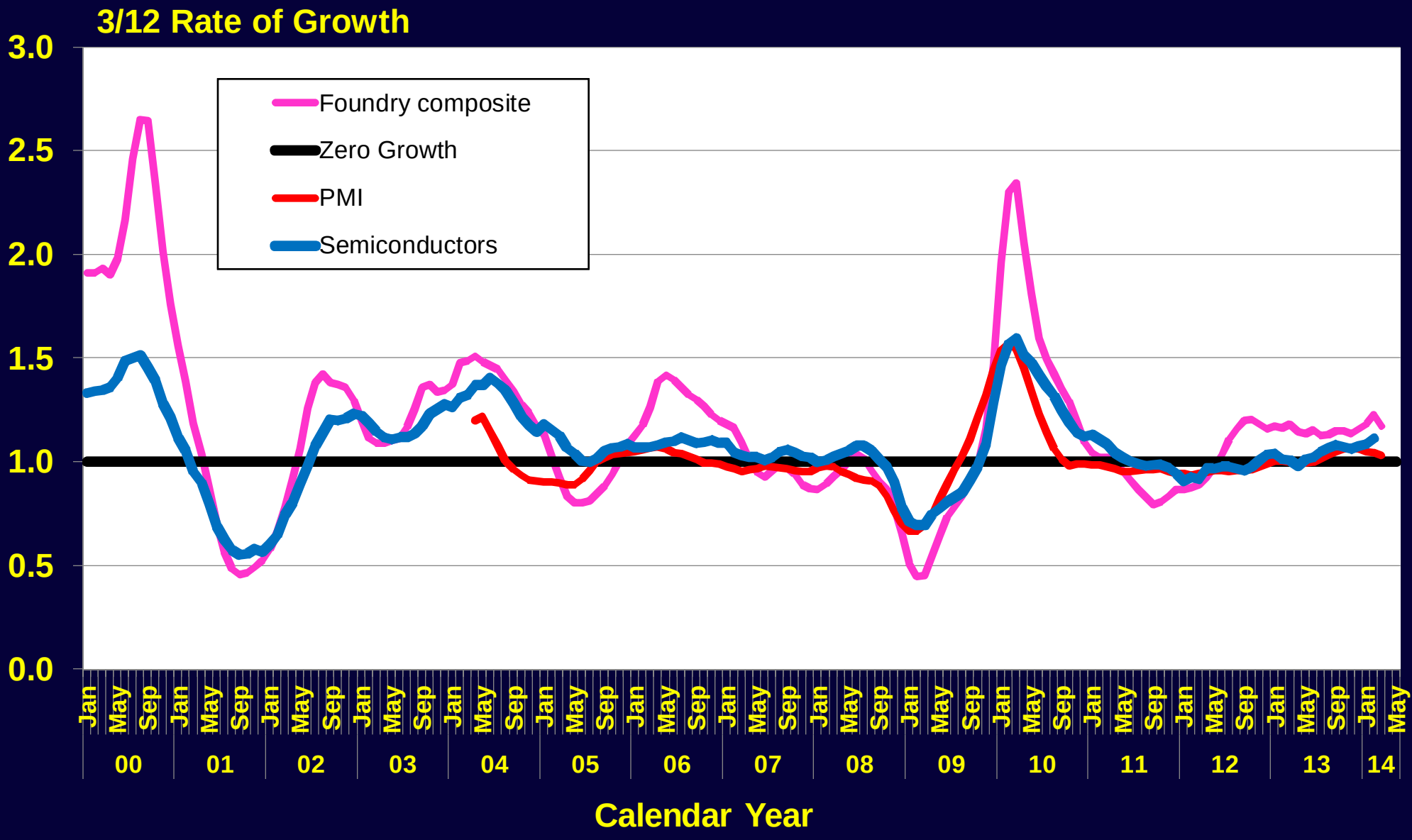
Taiwan Wafer Foundries
Composite of 14 Manufacturers



VIA Technologies, Advance Microelectronics, Advance Wireless Semiconductor, Episil Technologies, Inotera Memories, Macronix Intl, Mosel Vitelic, Powerchip Semi, Precision Silicon, ProMOS Tech, TSMC, United Microelectronics, Vanguard International Semi, Winbond Electronics

Chart 12

Global Semiconductor Shipments vs. Taiwan Foundry Composite & Global PMI



http://www.census.gov/indicator/www/m3/

Chart 13

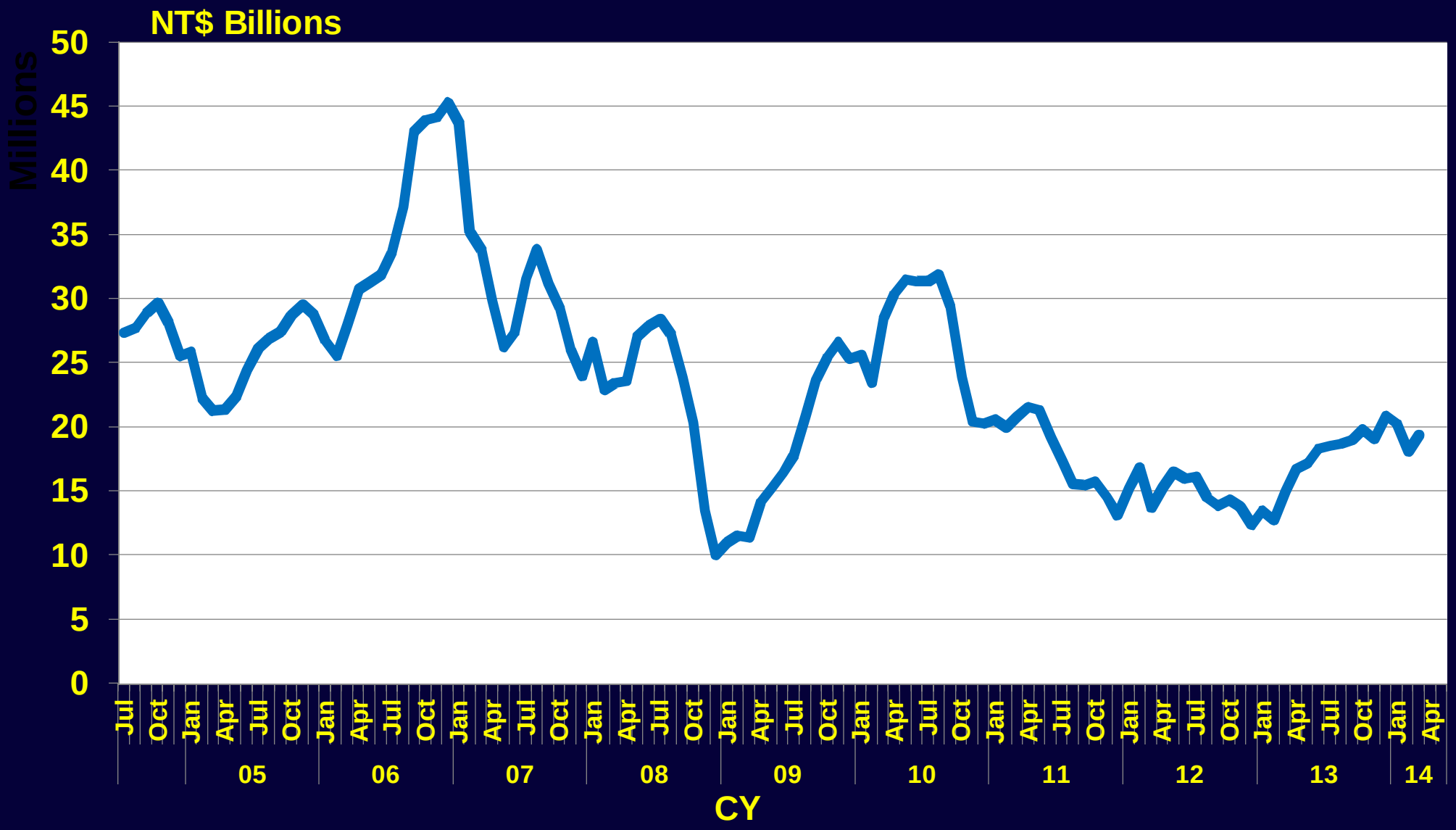
Taiwan Package & Test Companies Composite of 20 Manufacturers



ASE, Ardentec, ChipMOS Tech, Chipbond Tech, E'dale Tech, Formosa, Advance Tech, Fupo Elec, Greatek Elec, International Semiconductor Tech, King Yuan Elec, Lingsen Precision, Orient Semiconductor, Powertech Tech, Signality System, Sigurg Microelectronics, SPIL, Thalin Semiconductor, Vate Tech, Walton Advanced Tech

Chart 14

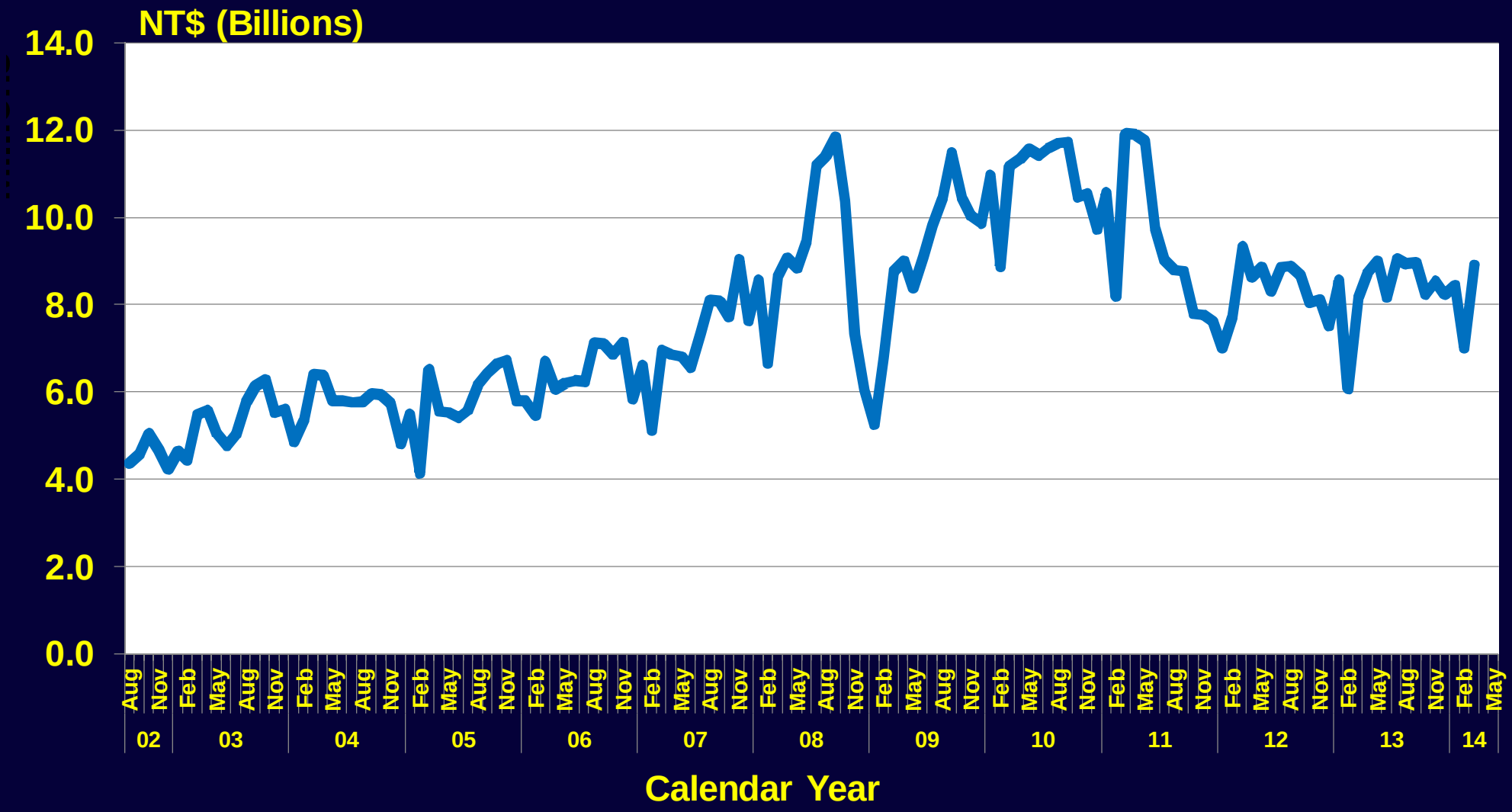
Taiwan Memory Companies
Composite of 8 Manufacturers



Silicon Integrated Systems, Inotera Memories, Macronix Intl, Mosel Vitelic, NanYa Tech, Powerchip Semiconductor, ProMOS, Winbond Elec

Chart 15

Taiwan Passive Component Companies
Composite of 25 Manufacturers



Chilsin Electronics, Cyntec, (FCE) Feei Cheng Enterprise, Holy Stone Enterprise, 3H (Honey Hope Honesty Enterprise), HJC (Hua Jung Components), Inpaq, Jaan Chem Technological, Kaimei Electronic, King Core Electronics, Laser Tek, Leatec Fine Ceramics, Lelon Electronics, Linton Technology, PTTC (Polytronics Technology Corp), PDC (Prosperity Dielectrics Co), Ralec Electronic, Ta-I Technology, Taiwan Alpha Electronic, Team Young Advanced Ceramics, Teapo Electronic, Thinking Electronic Industrial, WTC (Walsin Technology Corp), Yageo, YCTC (Yeh-Chiang Technology Corp)

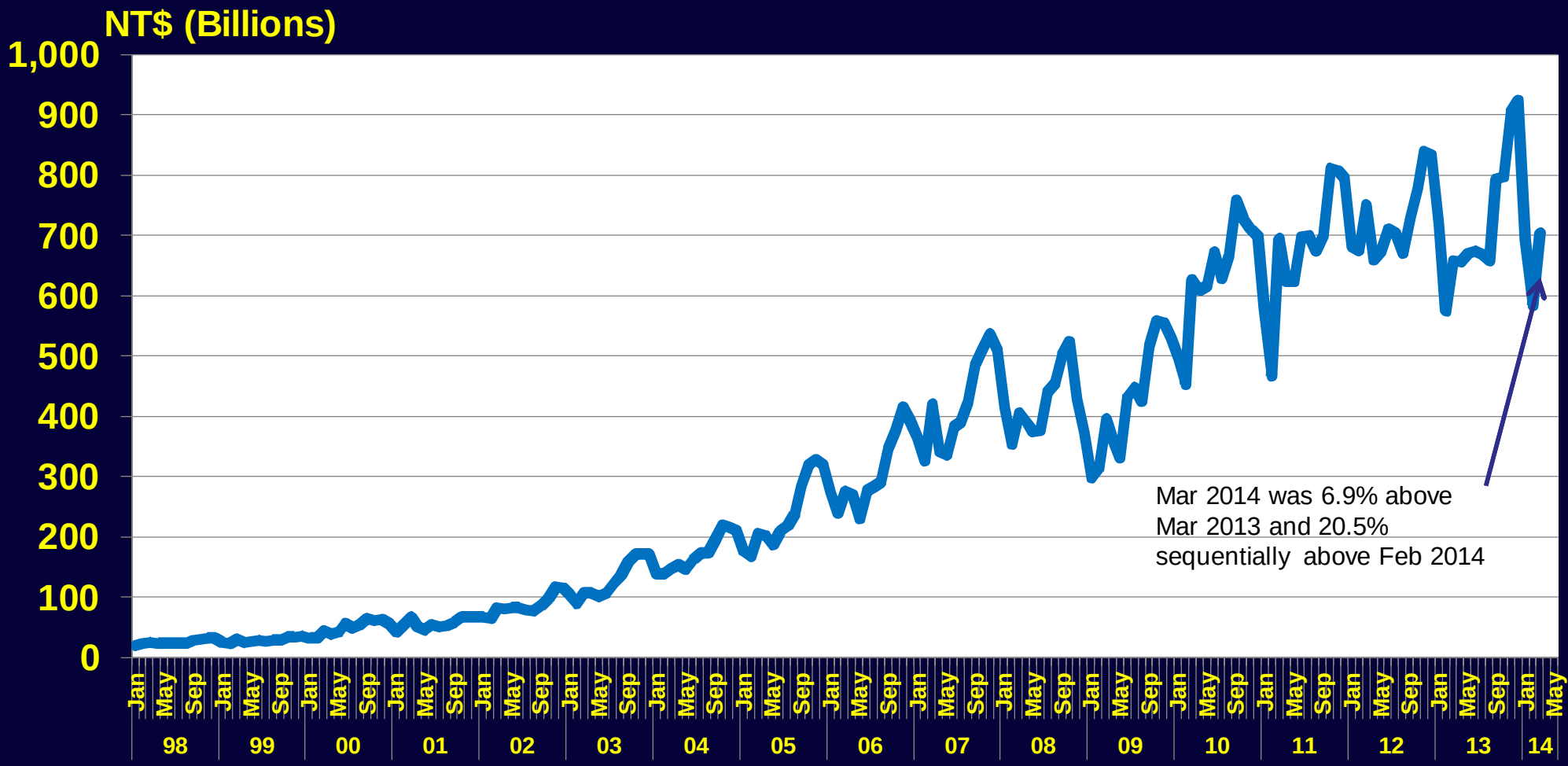
Chart 16

Taiwan Solar/Photovoltaic Panel Companies
Composite of 17 Manufacturers


NT$ (Billions)
25
20
15
10
5
0
Jan May Sep Jan May Sep Jan May Sep

Chart 17

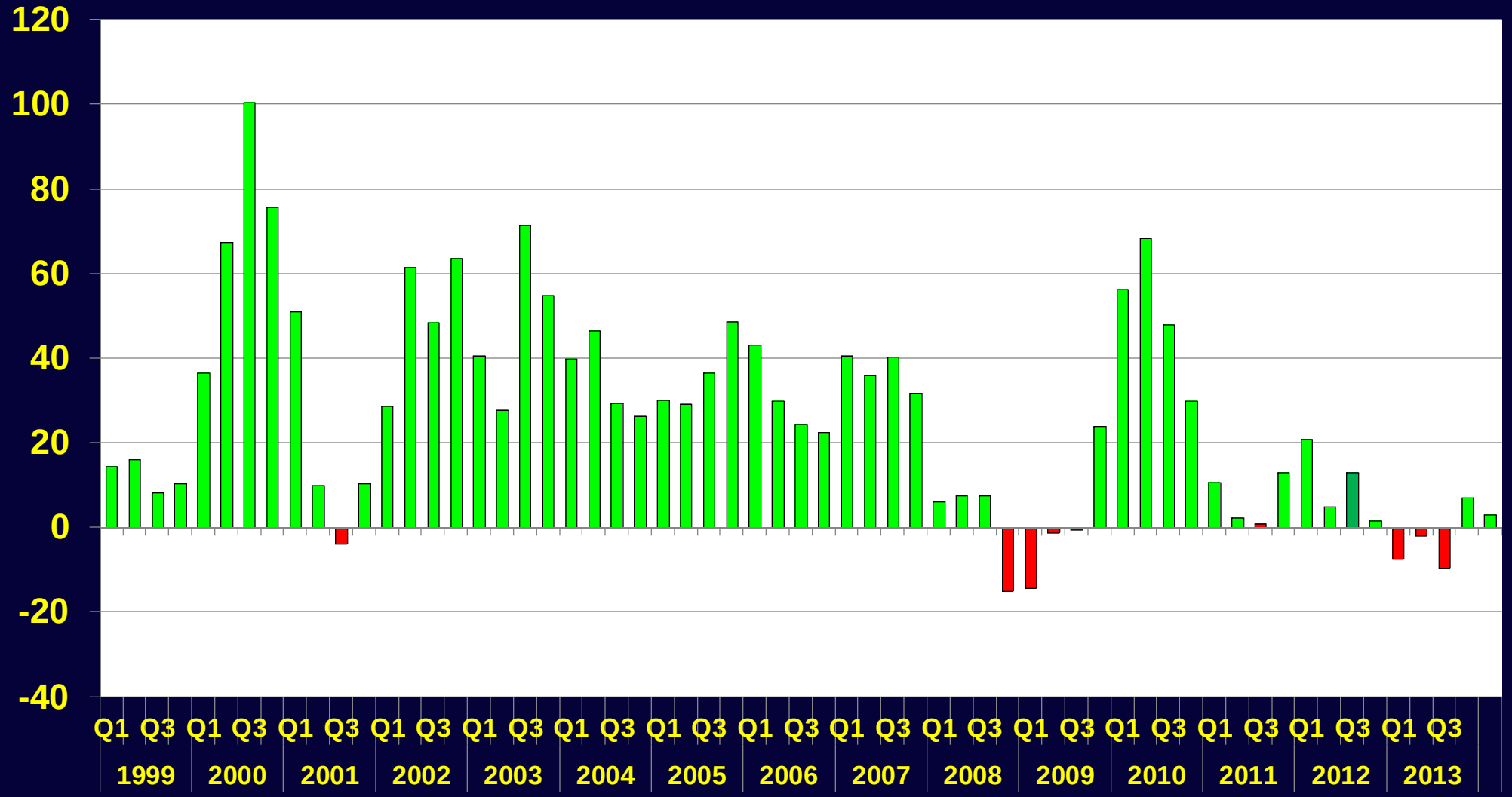
Taiwan ODM Companies
Composite Sales of 11 Large Manufacturers



Asustek Computer, Chei Mei, Compal Electronics, Foxconn, Chimei Innolux , Inventec, Inventec Appliance, Lite On Technology, Mitac International, Pegatron, Quanta Computer, Wistron, Chei Mei Display replacing Chei Mei & Innolux Display 3/10 & later

Chart 18

Large ODM Companies
Composite of 10 Public Manufacturers
Quarterly Revenue Growth

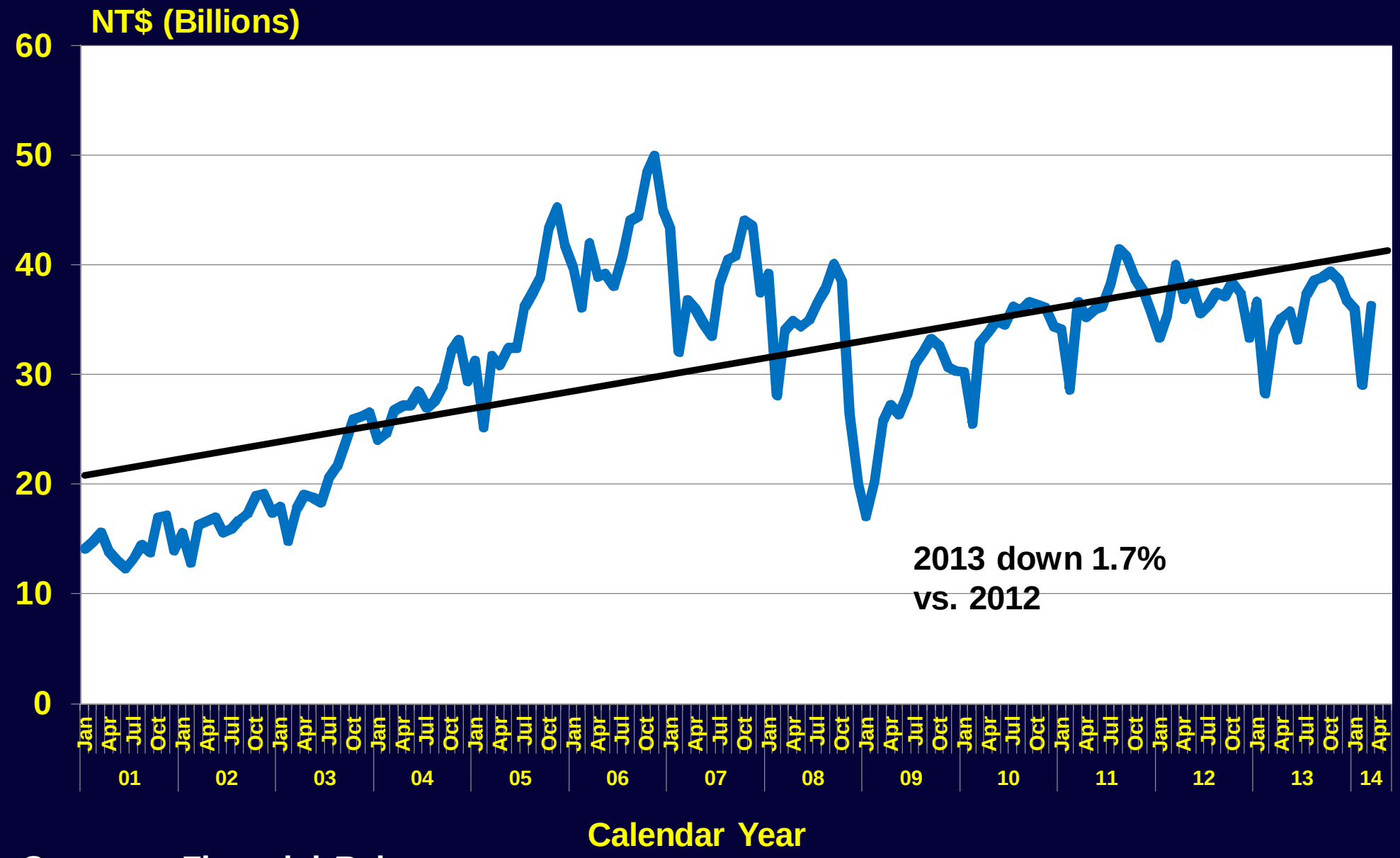


Asustek Computer, Compal Electronics, Foxconn, Chimei Innolux, Inventec, Inventec Appliance, Lite On Technology, Mitac International, Pegatron, Quanta Computer, Wistron

Chart 19

Taiwan Rigid & Flex PCB Shipments

Broad Composite of 46 Taiwan-listed Manufacturers



Company Financial Releases

Chart 20

Taiwan Rigid Laminate/Prepreg Vendors Composite of 8 Large Manufacturers

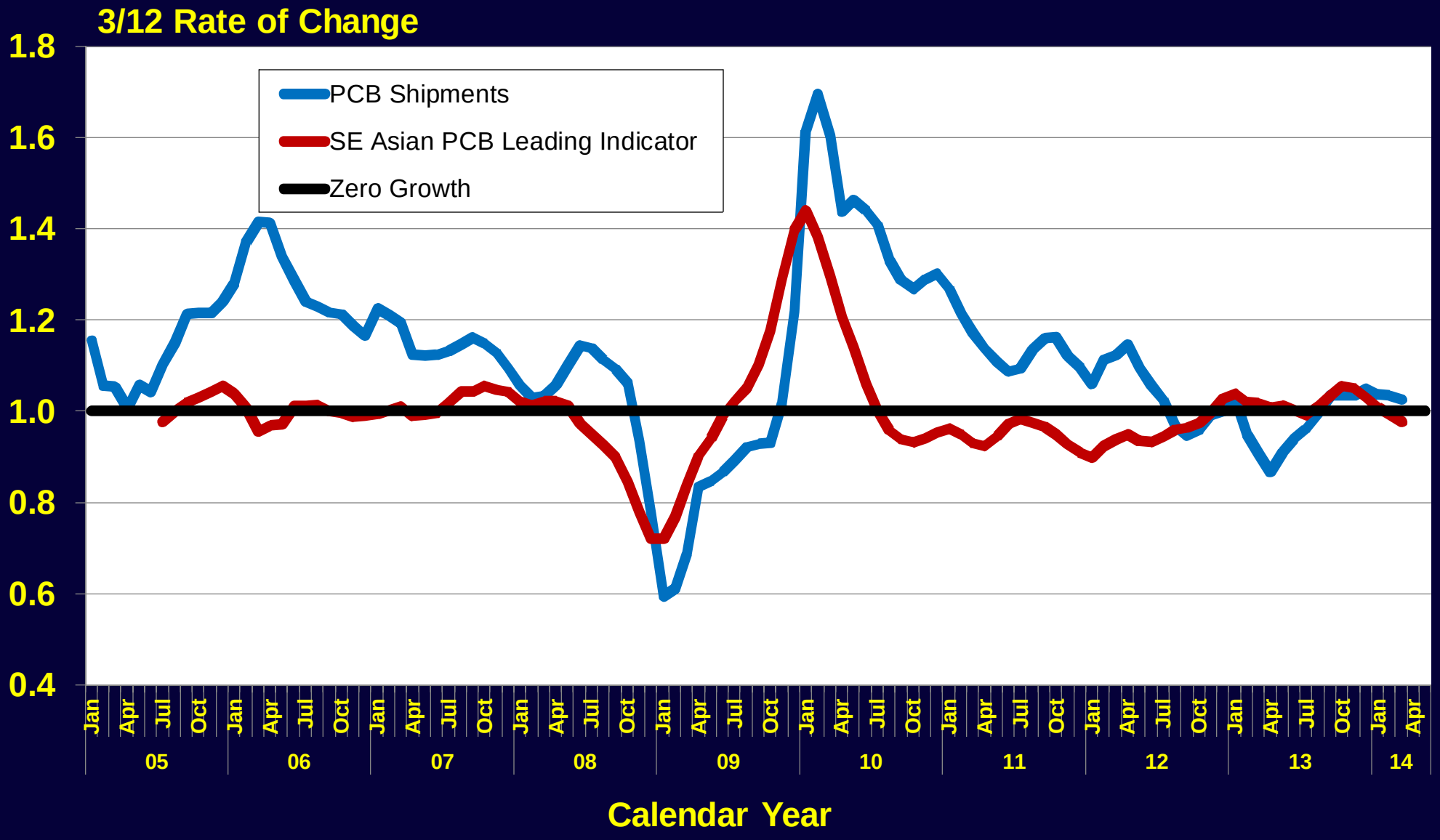


Company Financial Releases

Elite Materials, Top Union Electronics, Taiwan Union Technology, Hwa Woei Laminate, Uniplus Electronics, Iteq, Taiwan Leader Advanced Technology, Shinemore Technology

Chart 21

SE Asia CCG PCB Leading Indicator
vs. China/Taiwan PCB Shipments @ Fluctuating Exchange

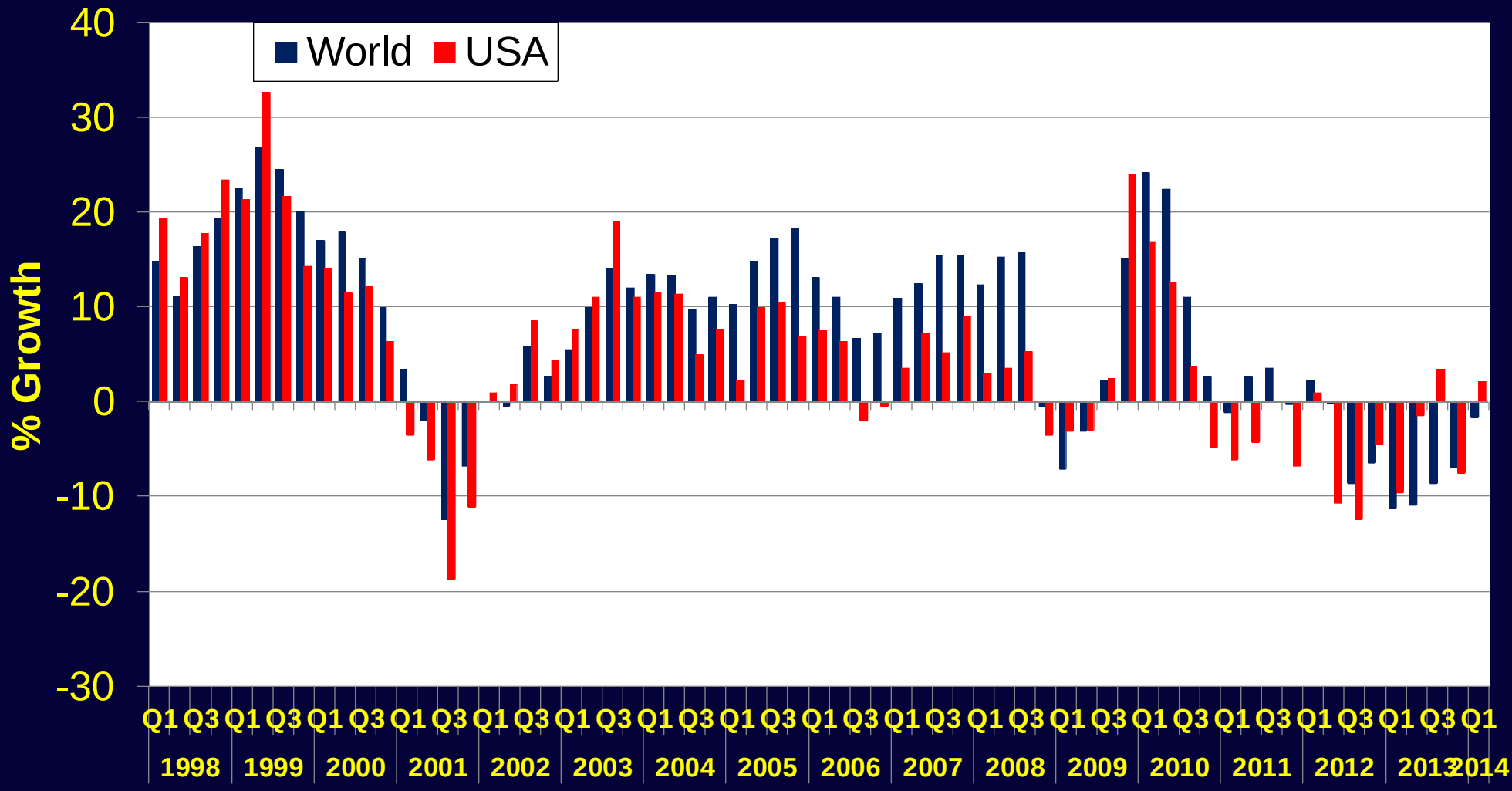


Source: Custer Consulting Group

Chart 22

Personal Computer Market Growth

World & USA



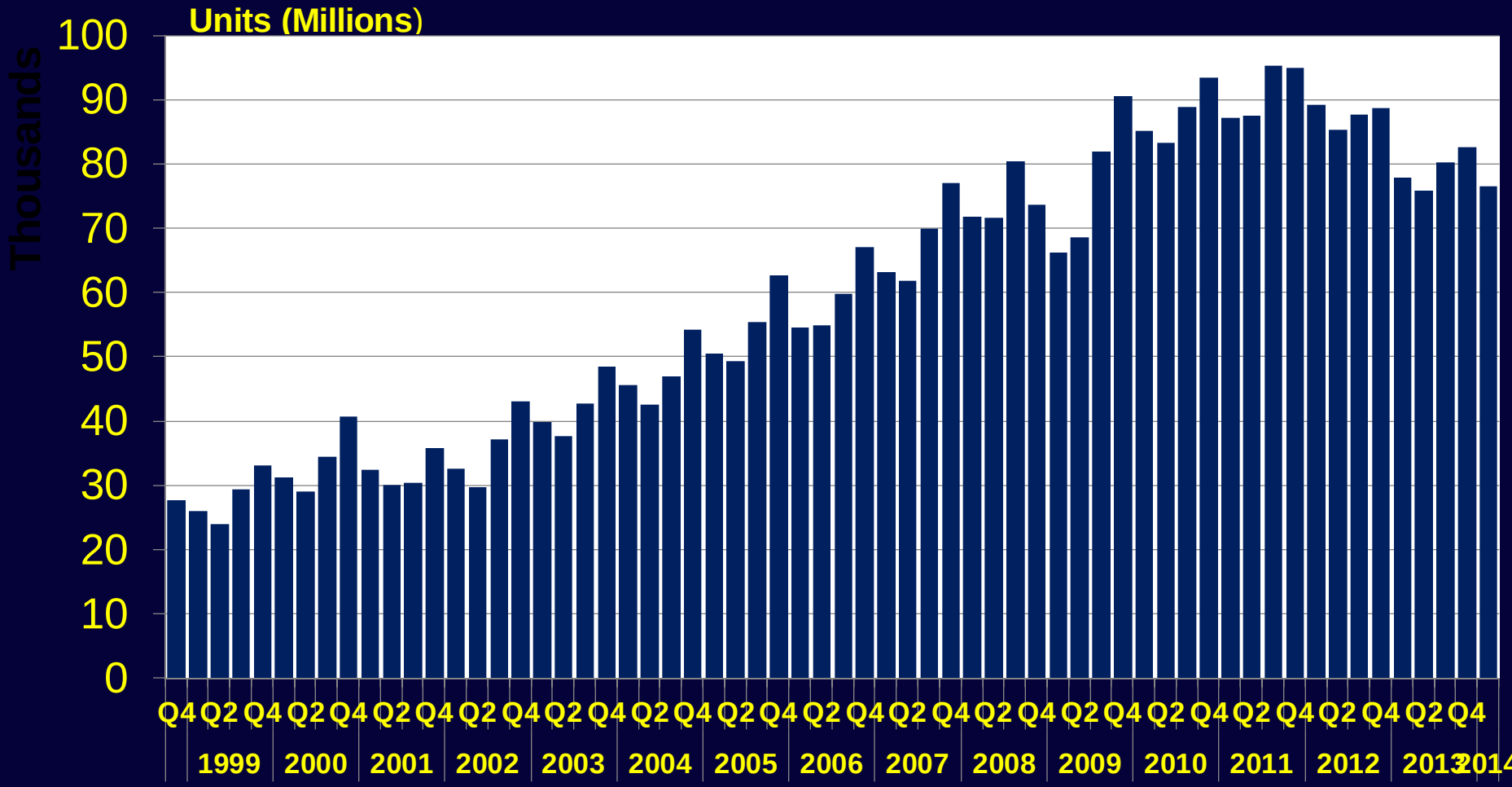
Gartner Dataquest

Chart 23

Personal Computer Unit Shipments

World

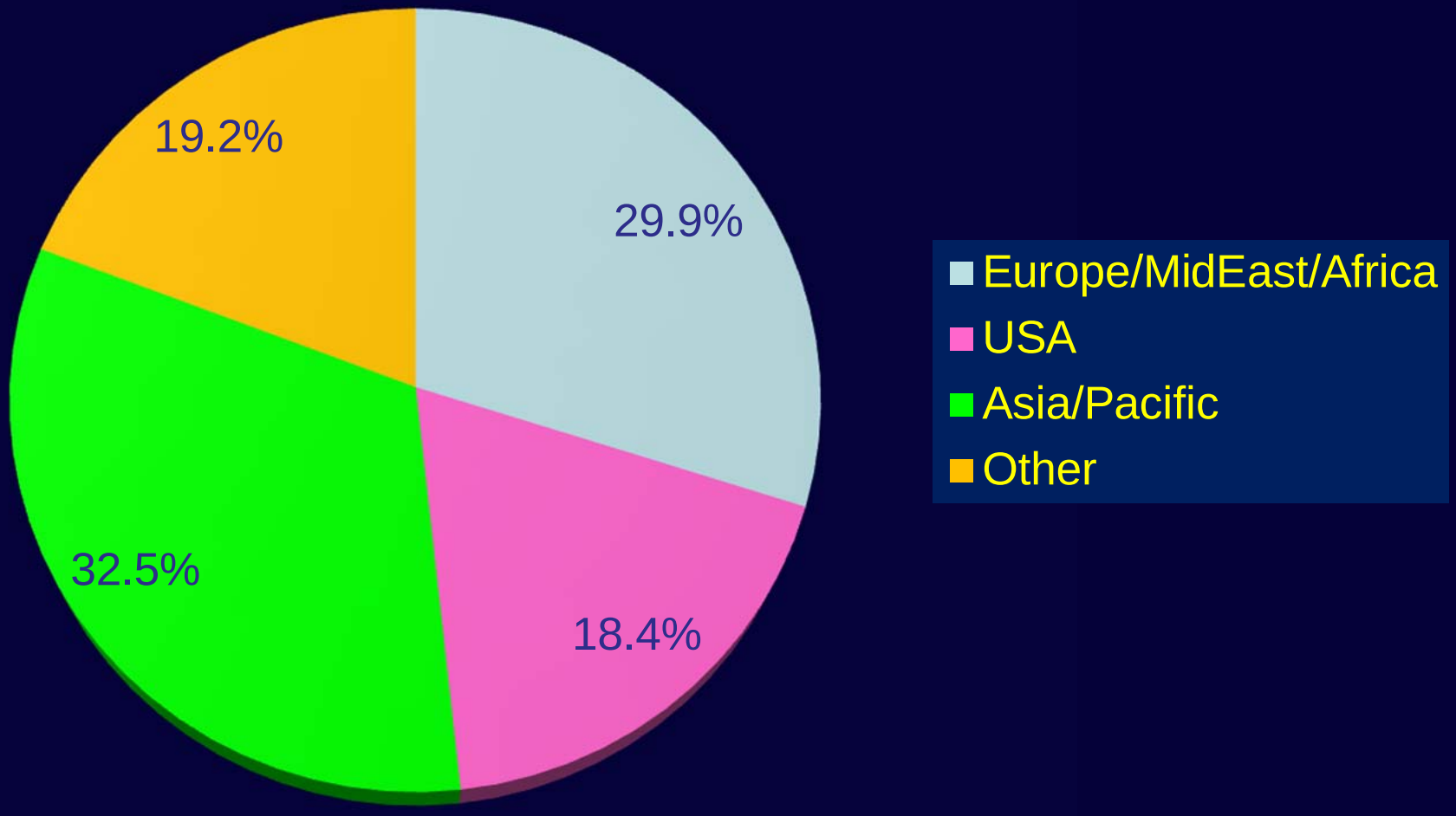
Units



Gartner Dataquest 4/14 & prior reports
Server & Media Tablets not included

Chart 24

World Personal Computer Market 1Q'14



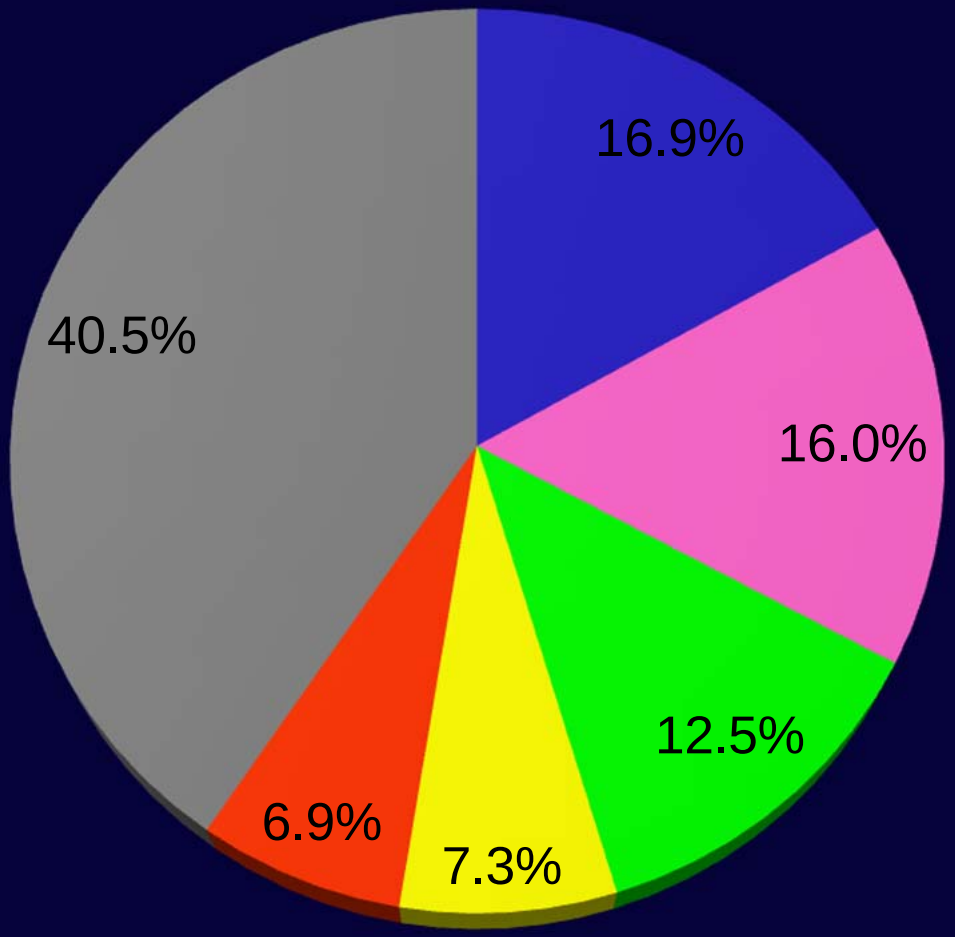
TOTAL: 76.6 Million Units

Includes desk-based PCs, mobile PCs, mini-notebooks but not Media Tablets

Gartner 4/14

Chart 25

World Personal Computer Market 1Q'14



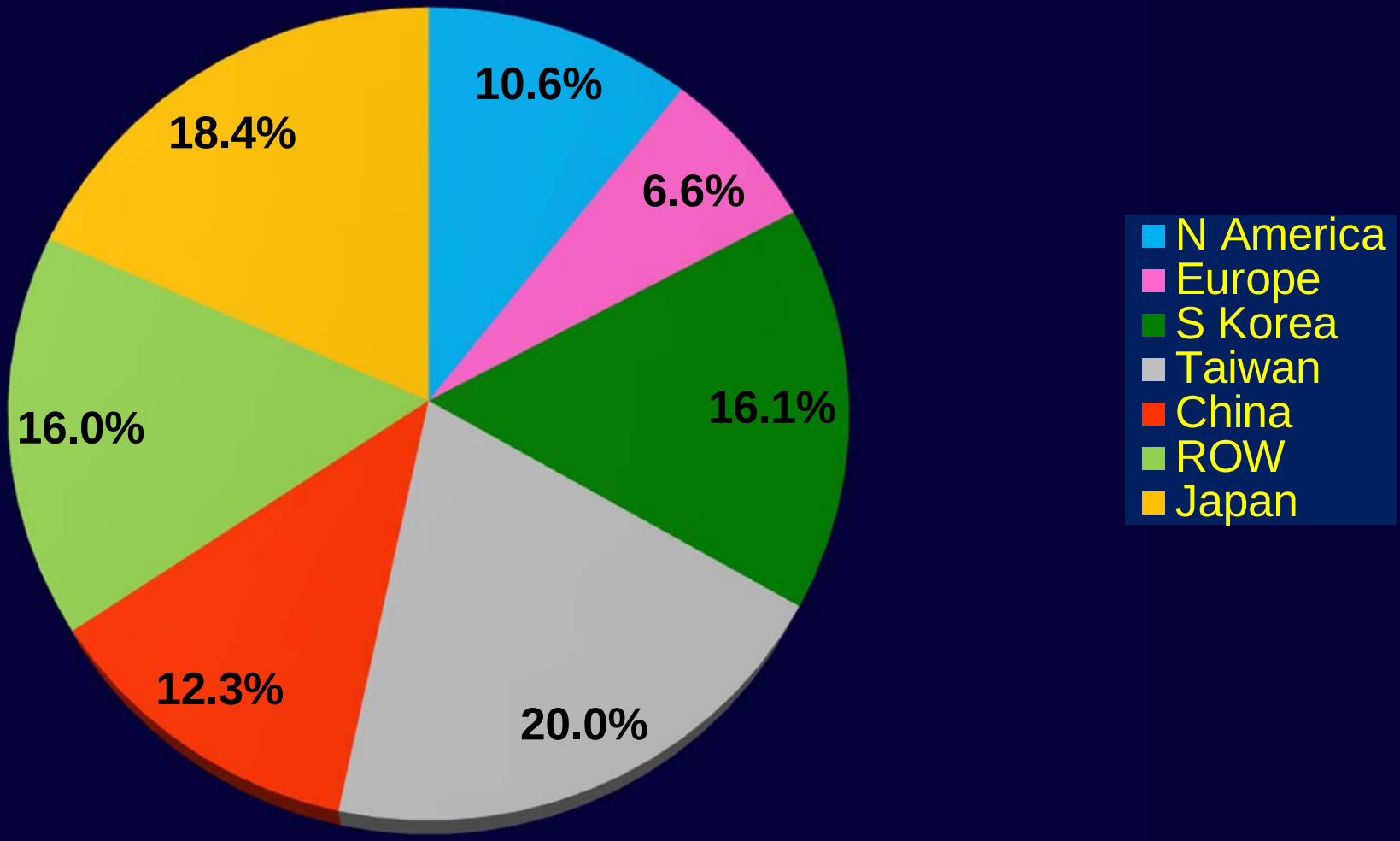
TOTAL: 76.6 Million Units

Includes desk-based PCs, mobile PCs, mini-notebooks but not Media Tablets

Gartner 4/14

Chart 26

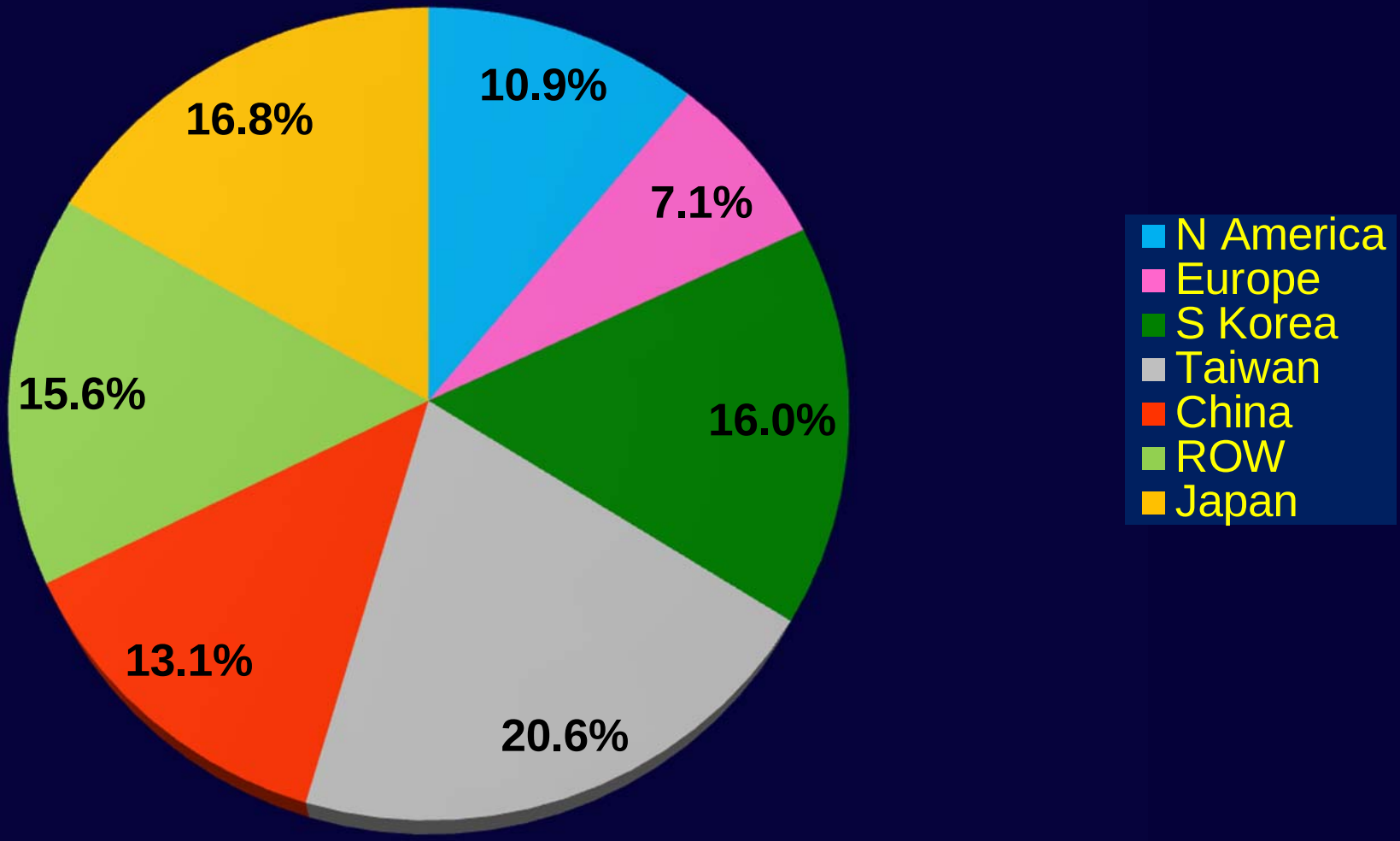
2012 Semiconductor Materials Market
$44.8 Billion



SEMI 4/14

Chart 27

2013 Semiconductor Materials Market
$43.5 Billion



SEMI 4/14

Chart 28

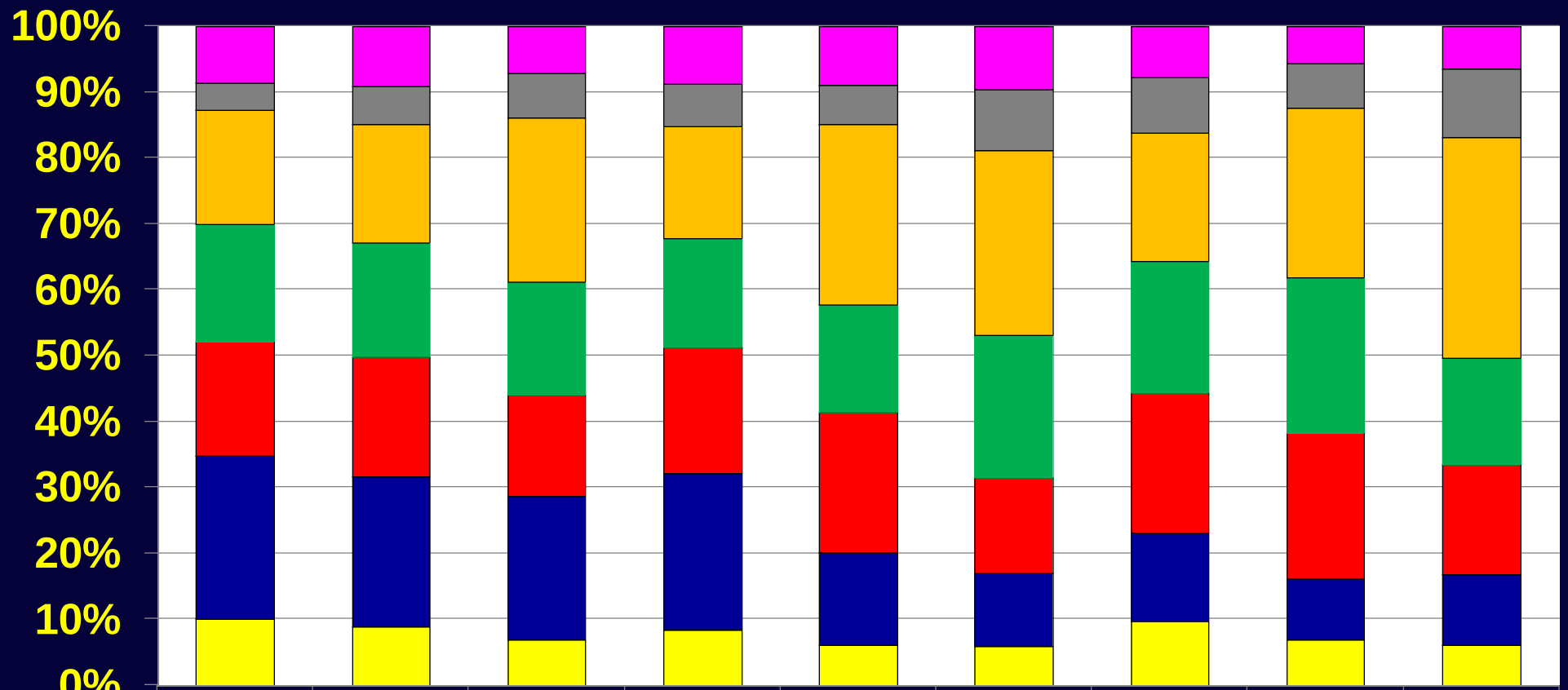
Top SEMI Equipment Revenues
2013 vs 2012 (US$ Millions)

	2012	2013	2013/2012
Applied Materials	5,513	5,460	- 1.0%
ASML	4,888	5,303	+ 8.5%
Lam Research	2,806	3,163	+12.7%
Tokyo Electron	4,219	3,057	-27.5%
KLA-Tencor	2,464	2,163	-12.2%
Dainippon Screen Mfg	1,484	1,224	-17.6%
Hitachi High-Technologies	1,138	862	-24.2%
Advantest	1,423	845	-40.6%
Teradyne	918	822	-10.4%
Nikon Corporation	1,007	636	-36.8%
Others	12,296	10,244	-16.7%
All companies	38,154	33,778	-11.5%

Gartner 4/13

Chart 29

Semiconductor Equipment Manufacturing Market

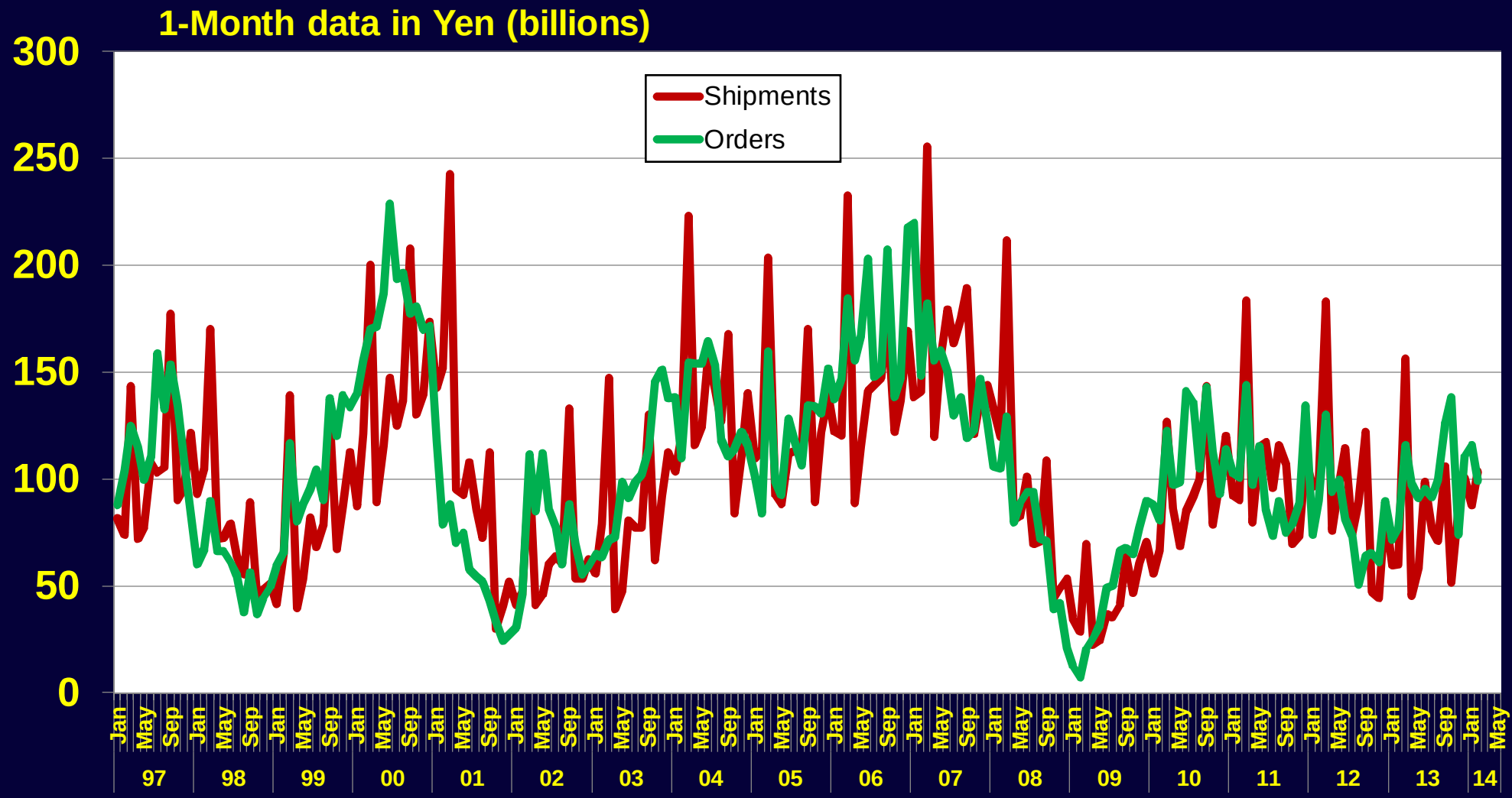


	2005	2006	2007	2008	2009	2010	2011	2012	2013
ROW	2.86	3.71	3.05	2.61	1.44	3.84	3.41	2.1	2.07
China	1.33	2.31	2.92	1.89	0.94	3.68	3.65	2.5	3.27
Taiwan	5.72	7.31	10.65	5.01	4.35	11.25	8.52	9.53	10.57
S Korea	5.83	7.01	7.35	4.89	2.6	8.63	8.66	8.67	5.13
N America	5.7	7.32	6.55	5.63	3.39	5.75	9.26	8.15	5.26
Japan	8.18	9.21	9.31	7.04	2.23	4.44	5.81	3.42	3.38
Europe	3.26	3.59	2.94	2.45	0.97	2.34	4.22	2.55	1.91

SEMI/SEAJ 4/14

Chart 30

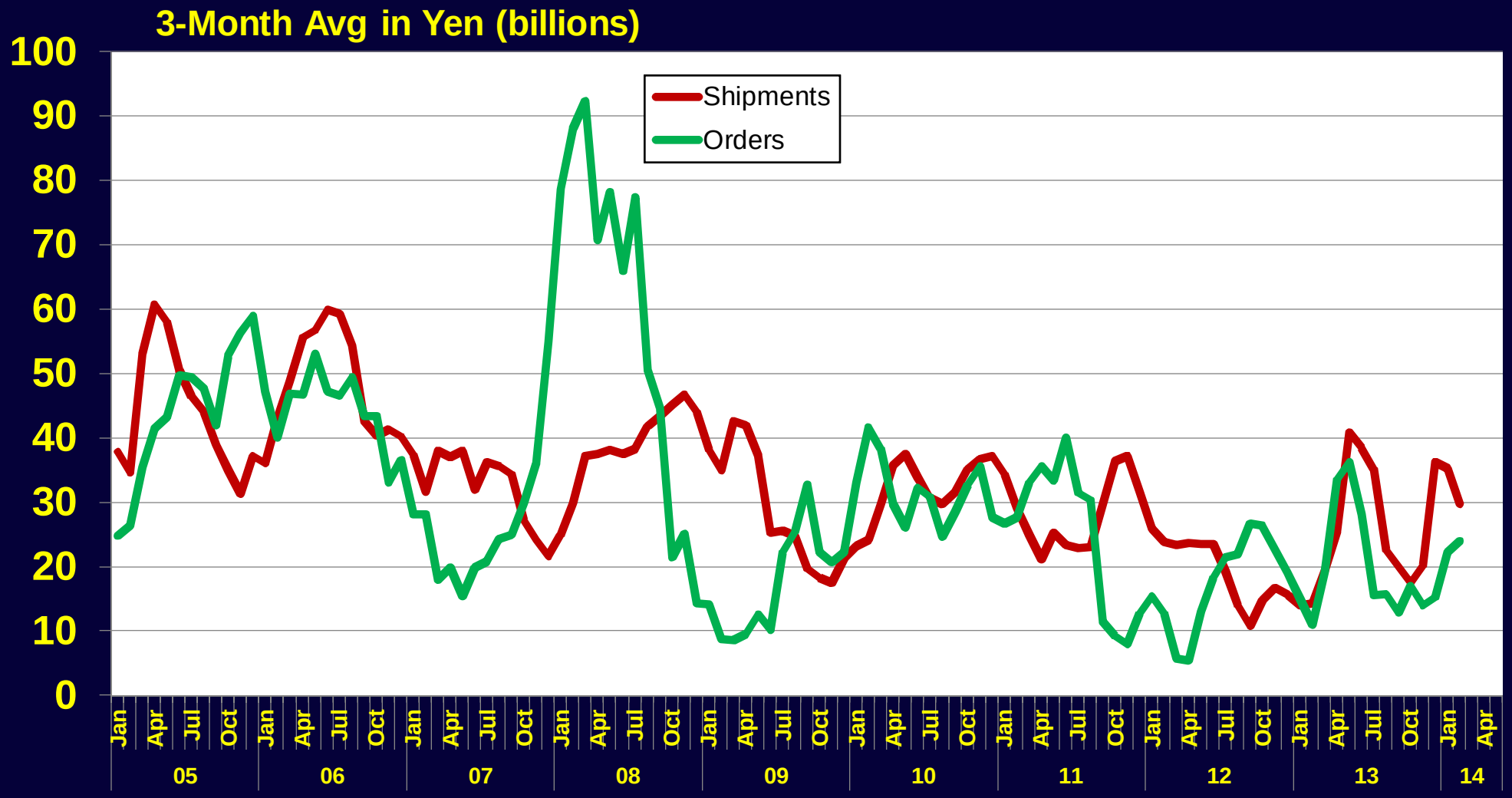
Japanese Semiconductor Equipment
Global Shipments & Orders



SOURCE Semiconductor Equipment Association of Japan; www.seaj.or.jp/english/

Chart 31

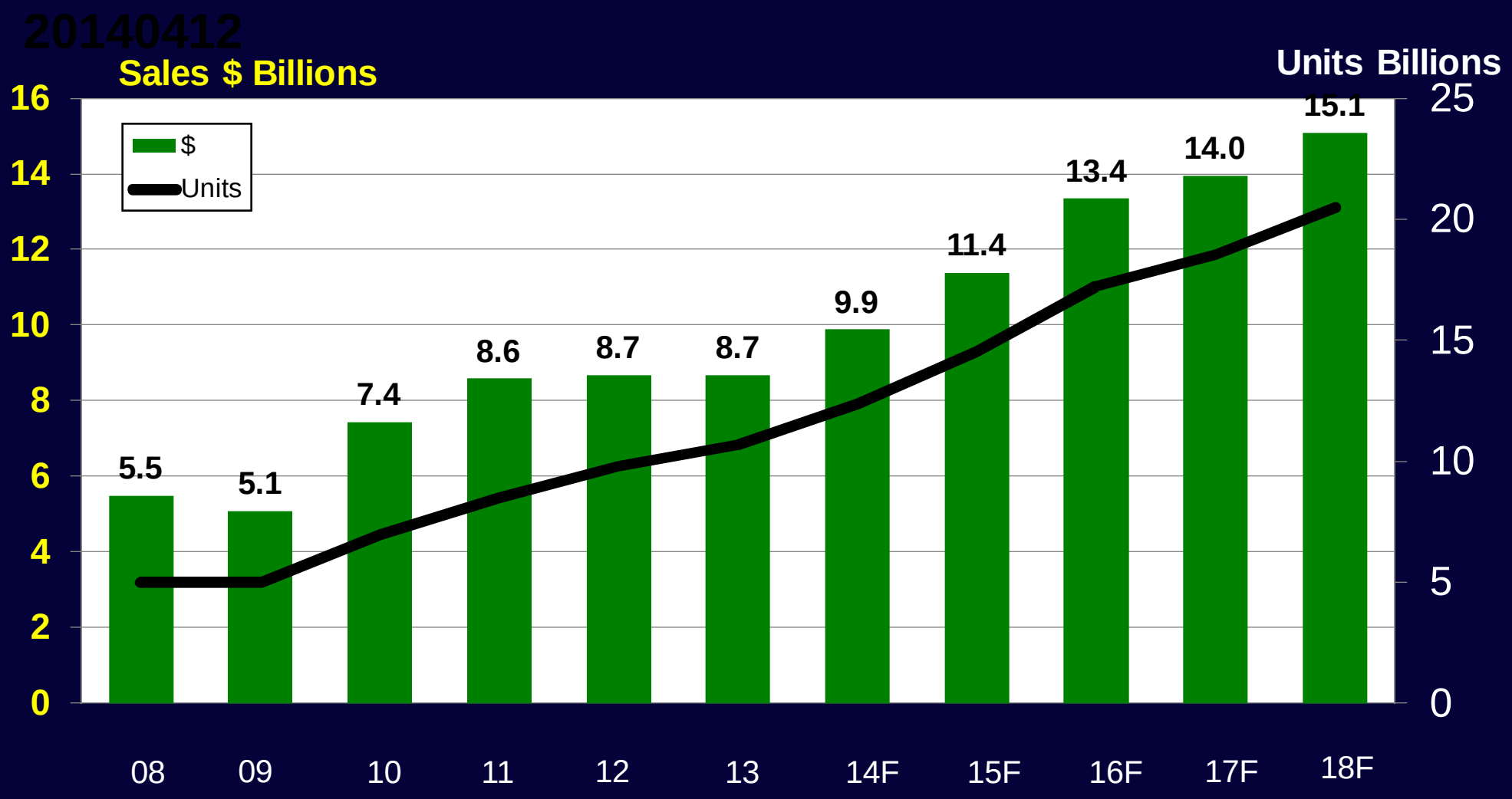
Japanese Flat Panel Display Equipment
Global Shipments & Orders



SOURCE Semiconductor Equipment Association of Japan; www.seaj.or.jp/english/

Chart 32

Sensor/Actuator Market



IC Insights 4/14