

Thick-SOI '08

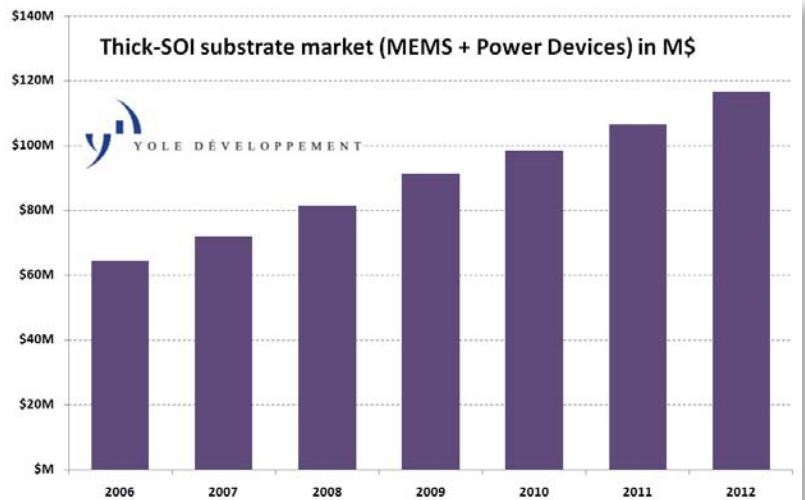
Thick-SOI Applications, Markets & Players 2006-2012 Report

In 2012, MEMS applications will account for 46% of the demand for thick-SOI wafers, representing a global market of over \$115M

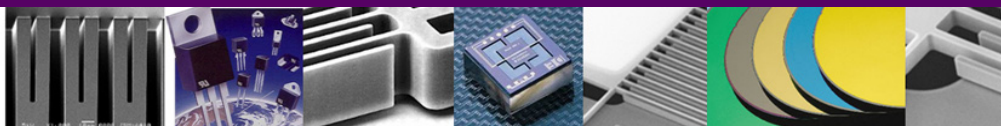
Consulting company Yole Développement releases in May 2008 its report dedicated to thick-SOI substrates. The term thick-SOI refers to a semiconductor substrate with an active, single-crystal silicon layer whose thickness exceeds 1 μ m. It lies on a buried oxide which is set on top of a silicon wafer carrier. This structure is widely used in MEMS and in Power Device electronics.

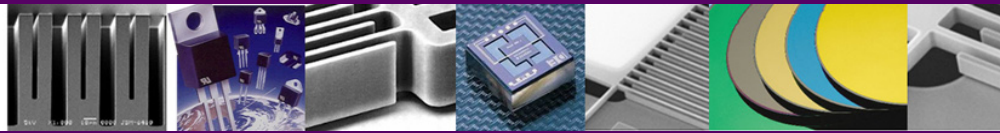
In 2007, thick-SOI substrates accounted for a \$72M market, representing approximately 380,000 6" (equiv.) wafer units. MEMS currently accounts for 38% of this market, and this figure is expected to exceed 45% by 2012. The other outlet for these products is the power semiconductor industry.

MEMS business is boosting thick-SOI demand thanks to the market dynamism of products such as accelerometers or gyroscopes, which are now widely used in numerous consumer products (cell-phones, game-pads, cameras...). MEMS-related activities are expected to drive more than 300,000 6" thick-SOI substrates in 2012.



Power electronics was the first sector with a need for thick-SOI: this technology was developed to design and manufacture some of the plasma TV (PDP) drivers ICs. As a result, the very high market penetration of plasma technology in large flat panel displays led to very rapid ramp-up in this segment. In 2006, about 200,000 6"-thick SOI wafers were processed. This being said, competition from LCD technology is currently reversing this trend: whereas the CAGR of thick-SOI PDP-related business was routinely above 25% in the past years, annual growth is forecasted to be only 6% after 2008.

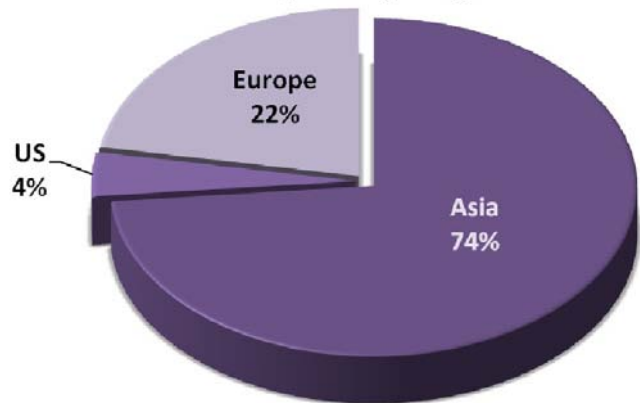




The leading company in the thick-SOI wafer business is still SEH (J), followed by SUMCO (J). Asia supplies about 75% of all thick-SOI wafers and is consuming in between 40% to 50% of the worldwide wafer volume in MEMS and Power Electronics.

Due to its involvement in both sectors, namely MEMS and Power electronics, DENSO (J) still leads the pack of the TOP 25 thick-SOI users, with STM, NEC and Fuji following fairly closely behind. The largest pure-MEMS player is Silex Microsystems, the Swedish company.

2007 Thick-SOI vendor revenues split by region



IN 2011, THE \$100M MARK WILL BE REACHED FOR SUBSTRATES, AND 10% CAGR IS FORECASTED UNTIL 2012.



Bio

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This report provides a unique description on the thick-SOI material business in a single package. It highlights the main metrics and the key market trends that will help material and equipment vendors to position their R&D efforts and anticipate the changes and forecasted evolution of their business.

Companies mentioned in the report

APM, ABB, Agiltron, Analog Devices, APM, Atotech, Auxitrol, Colibrays, Covalent Materials, Dalsa Semiconductor, Delphy, Denso, E2V, FST, Fraunhofer IZM, Freescale Sendai, Fuji Electric, GE sensing, Grunfos, Hitachi, Honeywell, IceMOS, IMT, Intersema (Semefab), Isonics Semiconductor, Kearfott, Komatsu, Kulite, LG Siltron, Matsushita, MEMS Engineering, Micralyne, Mitsubishi, Murata, National Semiconductor, NEC, NXP, OKI Electric, Okmetic, Olivetti Ijet, Pirelli, Pixtronix, Presens, QinetiQ, SEH: Shin Etsu Hendotai, SiGen, Siimpel, Silex Microsystems, Simgui, SMI (Elmos), SOITEC-TRACIT, STM, SUMCO, Teledyne Scientific & Imaging LLC, Texas Instrument, THALES Avionic, TMT, Tokyo Electron, Toshiba, Tronic's, TSMC, Ultrasil Corporation, Virginia SC, VTI, Wafer World, X'FAB...

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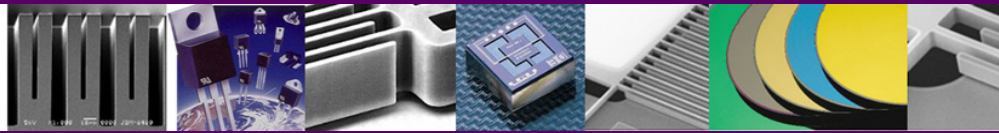


TABLE OF CONTENTS

• EXECUTIVE SUMMARY	p4	
• THICK SOI MARKET ANALYSIS	p5	
– Thick SOI application fields		– Comparison with mainstream SC market: in 2007, Power Devices was accounting for ~9%
– Thick SOI definitions		– Focus on discretes market: 2005->2007: IGBTs are pushing
– Market for MEMS: 2006-2012 thick SOI wafers volume split by MEMS devices		– Focus on IPM: Voltage regulators are leading the market
– Market for Power Devices: 2006-2012 thick SOI wafers volume		– 2007 Top-20 company main products (discretes and power modules)
– 2006-2012 total wafers volume (6" equiv. units)		– 2005-2012 wafers consumption (6" equiv. wafer units)
– 2006-2012 value in M\$ (MEMS & Power Devices)		– Power Devices: Definitions
– 2007 Top25 thick-SOI wafers company consumption.		– What kind of devices is SOI targeting?
– Estimation in 6" wafer units MEMS & Power Device Markets		– What kind of applications is SOI targeting?
– Bonded-SOI vs. Epi-SOI		– Use of SOI in Power devices IPM Deep Trench Isolation (DTI)
– Geographical breakdown for thick-SOI usage in 2007		– What kind of components is targeting SOI ?
– Thick-SOI: Main technical trends. Top Si layer & BOX thickness		– The Membrane Power Device
– Thick SOI wafer suppliers	p16	– What kind of components is targeting SOI ? Example of DENSO Research Center
– Thick-SOI 2007 estimated production		– SOI competing technologies
– Estimation of 2007 6" equiv. thick-SOI wafers production per company in units		– Who's using thick SOI for power devices ?
– 2007 thick-SOI vendor revenues. Breakdown by region		– Example of thick-SOI application: Plasma Display Panel (PDP) driver IC
– Short company profiles:		– Plasma Display Panel (PDP) driver IC. 2005-2012 market data (units & value)
• Icemos Technology		– Example of thick-SOI applications: PDP scan drivers
• Covalent Materials		– Positioning of SOI technologies in display drivers
• Isonics Semiconductor		– Example of PDP scan drivers: NEC PDP scan drivers road map 192 then 256 outputs
• Simgui		– Conclusions for Power Devices
• SEH: Shin Etsu Hendotai		
• SOITEC – TRACIT		• RECENT NEWS IN POWER DEVICES AND THICK-SOI
• Okmetic		p81
• MEMS Engineering		
• Ultrasil Corporation		– Toshiba: High Voltage Three-Phase Motor Drivers with Built-In Power Management Circuits
		– ATMEL: 1st high voltage automotive load driver IC on SOI- BCD technology
• 2006-2012 MEMS MARKET	p29	– On the feasibility of super junction thick-SOI power LD MOS transistors for RF base station applications
– Micromachining approaches in MEMS		– Philips "A-BCD" thick SOI technology
– SOI-MEMS micromachining		– Toshiba SOI news
– Use of different materials in the MEMS field		– Infineon & ABB SOI news
– 2006-2012 MEMS market value (M\$)		– ±600V ±2A TRIAC in SOI substrates for domestic applications (source Leti & STM)
– 2006-2012 MEMS market value split by application		
– MEMS CAGR ranking by products		• OTHER MARKETS: IMAGE SENSORS & PHOTONICS
– MEMS market forecast: comments		p89
– 2007 MEMS manufacturer TOP 30 revenues		
– 2008 TOP 30 MEMS players: comments		– Thick SOI in Back-Side Illumination imaging sensors
– MEMS substrates size evolution. Si and SOI		– CMOS imagers: SOI process of OKI
– SOI use in selected MEMS Companies		– Thick-SOI for waveguides technology
• Vacuum cavities on SOI wafers for MEMS & IC integration		– IBM: Si photonics scaling in microelectronic applications
• 3D integration of MEMS: DALSA Semiconductor		– SOI in Photonics applications
• RF MEMS Players. Teledyne Scientific & Imaging LLC – Tunable Capacitors		
• Silicon Microphone Players. Auxitrol		• CONCLUSIONS:
• Silicon Microphone Players. Pixtronix (Analog Devices foundry)		p95
		– Summary for Thick-SOI needs
• 2006-2012 POWER DEVICE MARKET	p51	
– Power Devices definition		• THICK-SOI USAGE DETAILS PER COMPANY: PRODUCTS, WAFER SIZE, SOI WAFER SPECIFICATION, SUPPLIER INFORMATION, OTHERS...
– Power Devices segmentation		p99
– Main applications of power devices		
– Si Power Devices Capabilities. Where SOI can be used?		– Analog Devices, APM, Denso, E2V, Freescale, Honeywell, Matsushita, OKI Electric, STM Catania, STM Tours, TMT, TSMC, Atotech, Dalsa Semiconductor, Fraunhofer IZM, Freescale Sedai, IMT, Micralyne, Pirelli, Siimpel, Silex Microsystems, Texas Instrument, VTT, X-Fab, Fraunhofer IPMS, Chemnitz Univ.
– Power Devices Technical Challenges		
– Most targeted applications by devices type		
– 2006-2012: The global power devices market: IPM will represent more than 50% by 2008		
– Revenues breakdown per application		

