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Press Release

2011 Top 10 Suppliers of Critical Subsystems to the Semiconductor and Related Manufacturing Industries

Santa Clara, CA – April 23, 2012: VLSIresearch released its 2011 Top 10 Suppliers of Critical Subsystems to the Semiconductor and Related Manufacturing Industries today. Several acquisitions and divestments, combined with strong spending on lithography tools resulted in a number of changes compared to 2010.

Once again, Carl Zeiss SMT continued to pull away from the field in first place with record sales of lenses valued at \$1,545M. Edwards also put in a strong performance, retaking second place from MKS Instruments who slipped back into third. Brooks Automation performed well and retained its fourth place, but the big gainer was Pfeiffer Vacuum Technology. Their acquisition of Alcatel-Lucent's Vacuum Technology Unit ("Adixen") at the end of 2010 resulted in a jump of sixteen places to fifth. Horiba consolidated its sixth position, while Advanced Energy Industries lost 2 places as the sale of its Aera mass flow business to Hitachi Metals took effect. Cymer and EBARA posted steady growth and retained their eighth and ninth places. Finally, a surge in sales in the first quarter of 2011 helped Hirata squeeze into the Top 10 for the first time.

Top 10 Suppliers of Critical Subsystems 2011

Company	Rank 2010	Rank 2011	Critical Subsystems Revenues 2011, \$M
Carl Zeiss SMT	1	1	1545
Edwards	3	2	585
MKS Instruments	2	3	530
Brooks Automation	4	4	425
Pfeiffer Vacuum Technology	21	5	310
Horiba Ltd	6	6	250
Advanced Energy Industries	5	7	235
Cymer Inc.	8	8	235
EBARA Corporation	9	9	190
Hirata	13	10	180

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2011 was a record year for suppliers of Critical Subsystems. Sales grew 9.3% to reach a value of \$7.88Bn. The main driver for the industry was capital expenditures on semiconductor manufacturing equipment for 32nm and below technology nodes. This stimulated demand for high value Critical Subsystems throughout the year and offset weakening demand from the flat panel display, data storage, LED and photovoltaic industries. The outlook for 2012 is for another record year with sales likely to beat the \$8Bn mark for the first time.

Critical Subsystems are products that have been designed to address specific applications within the semiconductor and related manufacturing industries, and actively affect the processing and handling of substrates.

About VLSIresearch inc

VLSIresearch inc is the leading provider of market research and economic analysis on the technical, business, and economic aspects within nanotechnology and related industries. The company is known for its unparalleled accuracy, innovation in market research, and its sharply focused insight into the rapidly changing landscape of the industries covered. Its databases on manufacturing are used throughout the industry, and by government. VLSIresearch's primary databases and reports cover the semiconductor, flat panel display, PV cell and module manufacturing industries, and the market for critical subsystems and components within these and associated high technology industries. VLSIresearch was founded in 1976.

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Critical Subsystemss: [Chip Market Research Services](#), [Customer Satisfaction Report](#), [Industry Pulse Pro®](#) , [PV-Solar](#), [Critical Subsystems](#)

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