

## Top 10 Critical Subsystems Suppliers for 2012

July 16, 2013

VLSIresearch released its 2012 Top 10 Suppliers of Critical Subsystems to the Semiconductor and Related Manufacturing Industries today. Sales of critical subsystems declined 24% to a value of \$6.2Bn in 2012 and all of the top 10 suppliers were affected by the slowdown. The top 10 from last year remained the same and most companies held their positions. The combined top 10 critical subsystem's share of the market fell from 56% in 2011 to 55% in 2012.

Company	Rank 2011	Rank 2012	Critical Subsystems Revenues 2012, \$M
Carl Zeiss SMT	1	1	1075
Edwards	2	2	420
MKS Instruments, Inc.	3	3	390
Brooks Automation, Inc.	5	4	360
Pfeiffer Vacuum Technology	4	5	330
Horiba, Ltd.	6	6	190
Cymer Inc	8	7	165
EBARA Corporation	9	8	160
Advanced Energy Industries, Inc.	7	9	155
Hirata	10	10	115

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Carl Zeiss SMT maintained its top spot among critical subsystems suppliers with lenses valued at \$1075M while Edwards consolidated its second place with sales of \$420M. MKS Instruments benefited from the diversity of its products to hold third place and close the gap with Edwards. Brooks Automation gained fourth place as their acquisition of Crossing Automation in the final quarter of 2012 gave their revenues the boost to leapfrog Pfeiffer Vacuum. HORIBA consolidated its sixth spot even though sales were down 25% as a result of the continued high yen and the economic depression in Japan. Cymer and EBARA Corporation both jumped up a place to seventh and eighth respectively with Advanced Energy taking ninth. Finally, Hirata managed to just stay ahead of Ultraclean Technology to retain tenth.

Several acquisitions took place in 2012 and are expected to make a difference in 2013. ASML announced their intention to acquire Cymer in order to accelerate the development of EUV light source technology, and Brooks Automation acquired Crossing Automation. On a smaller scale, MKS Instruments acquired Plasmart which will strengthen its position in the Korean market.

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