

2014 Top 10 Semiconductor Equipment Suppliers

(worldwide sales, equipment and service)

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2014 Rank	AOW	Company
1	NA	Applied Materials
2	EU	ASML
3	JA	Tokyo Electron
4	NA	Lam Research
5	NA	KLA-Tencor
6	JA	SCREEN Group
7	JA	Advantest Corporation
8	NA	Teradyne
9	JA	Hitachi High-Technologies
10	JA	Nikon Corporation

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- Tokyo Electron and Nikon achieved over 30% growth for the year
 - Both TEL and Nikon are well positioned in all key customer segments
- Number of companies had well over 20% growth rates
 - They benefitted from improved semiconductor business that drove equipment demand
 - Mobile was key driver for all segments
- All Test and Assembly equipment suppliers showed over 20% growth
 - Broad and robust demand for equipment in 2014

Key Business Drivers in 2014

- Memory suppliers invested strongly in factories
 - Solid demand for memory throughout the year
 - Applied Materials, ASML, Lam Research, and TEL saw business growing with high memory capex
- Foundries invested in 20nm capacity ramp in early 2014
 - They provided healthy baseline demand for leading equipment suppliers
- Applied Materials, ASML, Lam Research, KLA-Tencor, HHT and TEL continue to do well at foundries
 - Mobile remained the fundamental driver
 - All segments: WFE, Test, and Assembly benefitted
- Broader semiconductor growth increased Assembly and Test sales

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