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VLSI RESEARCH INC

2007 Top Ten FPD Equipment Suppliers

—The top four companies maintained their positions from last year.

Santa Clara, CA, April 14, 2008: VLSI Research Inc has announced the Top Ten Flat Panel Display (FPD) Equipment Suppliers of 2007. The FPD Equipment Industry sales reached \$6.0B in 2007, down 26% from the \$8.1B achieved a year ago. **Applied Materials, Ulvac Inc., Tokyo Electron Ltd., and Nikon Corporation** maintained the top four spots from 2006 despite all having double digit declines in sales. The rest of the VLSI Top Ten fared no better, as the entire group contracted by 28% to \$4.2B.

There was substantial movement in the remaining positions of the Top Ten Equipment Suppliers. **Hitachi High-Technologies** jumped two spots, securing themselves within the top five, while **Hitachi Plant Technologies** moved up three to obtain the sixth position. **Daifuku** moved up four spots and **Shibaura Machatronics** gained three to make the seventh and eight positions, respectively. **Canon**, which was number one in 2005, came in as the ninth largest supplier of 2007. Finally, **Dainippon Screen Manufacturing Company** closed out the Top Ten.

As for the Next Five, **Toray Engineering, Semes**, and **Mitsuboshi Diamond Industrial** took the eleventh, twelfth, and thirteenth positions, respectively. Propelled by an atypical 2007 double digit growth, **YAC** climbed to the fourteenth spot. **Micronics Japan** rounded out the Top 15.

Top Ten Display Equipment Suppliers[†]

<u>2007</u>		<u>2007</u>	<u>2006</u>	<u>2005</u>	<u>2006</u>	<u>2005</u>
<u>Rank</u>	<u>Company</u>	<u>\$M</u>	<u>\$M</u>	<u>\$M</u>	<u>Rank</u>	<u>Rank</u>
1	Applied Materials	797	989	757	1	3
2	Ulvac, Inc.	783	954	846	2	2
3	Tokyo Electron LTD.	640	860	756	3	4
4	Nikon Corporation	377	626	647	4	5
5	Hitachi High-Technologies Corp.	326	395	406	7	7
6	Hitachi Plant Technologies, Ltd.	291	330	378	9	8
7	Daifuku	276	266	254	11	10
8	Shibaura Mechatronics Corp.	253	278	223	10	11
9	Canon, Inc.	236	591	1079	5	1
10	Dainippon Screen Mfg. Co., Ltd.	220	544	536	6	6
	<u>Next Five</u>					
11	Toray Engineering Co., Ltd.	188	348	321	8	9
12	Semes Co., Ltd.	136	133	NA	13	20
13	Mitsuboshi Diamond Industrial Co., Ltd	116	124	151	15	12
14	YAC. Co., Ltd.	106	65	63	19	21
15	Micronics Japan Co., Ltd.	69	93	108	16	15

[†]Includes revenues from display related manufacturing system sales, service and support.

According to VLSI Research, the Top 15 Suppliers comprised 80.6% of the FPD equipment industry (which consists of approximately 70 companies) in 2007, down one percent from 2006. Of the Top 15, all but two are Japanese companies.

2007 was the second negative year in a row for the volatile FPD Equipment Industry, which also decreased by 2% in 2006. However, the Flat Panel Display Industry, which purchases the equipment, has had double digit growths for the past six years, increasing by 35% in 2007 alone.

This increased revenue growth, combined with eroding capacity due to lower capital expenditures in the past two years, suggests that the FPD equipment industry is likely due for an upturn soon.

The data in this press release were extracted from VLSI Research's advisory titled 2007 Top Ten Equipment Suppliers to the Flat Panel Display Industry published in April 2008. Details on this report and other VLSI studies can be found by visiting the website at www.vlsiresearch.com.

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