

## VLSI RESEARCH INC

### 2006 Top Ten FPD Equipment Suppliers —Applied Materials acquired number one spot for the first time.

Santa Clara, CA, May 10, 2007: VLSI Research Inc is pleased to announce the Top Ten FPD Equipment Suppliers in 2006. **Applied Materials** acquired the number one spot for the first time in VLSI's Top Ten FPD Equipment Suppliers for 2006. The number two and three spots went to **Ulvac** and **Tokyo Electron**. **Nikon** moved up one position to obtain the number four spot. **Dainippon Screen** advanced one position to number six spot. **Shibaura Mechatronics** overtook the number nine spot from **Daifuku** by selling a mere \$0.3M more equipment than Daifuku.

#### Top Ten Display Equipment Suppliers<sup>†</sup>

<u>2006</u>		<u>2006</u>	<u>2005</u>	<u>2004</u>	<u>2005</u>	<u>2004</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	989	757	611	3	5
2	Ulvac, Inc.	954	846	803	2	2
3	Tokyo Electron Ltd.	860	756	834	4	1
4	Nikon Corporation	633	647	580	5	6
5	Canon, Inc.	591	1079	647	1	4
6	Dainippon Screen Mfg. Co., Ltd.	544	536	664	7	3
7	Hitachi High-Technologies Corp.	525	588	424	6	7
8	Hitachi Plant Technologies, Ltd.	330	378	NA	8	NA
9	Shibaura Mechatronics Corporation	278	223	269	10	8
10	Daifuku	278	254	218	9	9
<u>Next Five</u>						
11	Photon Dynamics	164	131	154	13	10
12	Orbotech Ltd.	129	79	65	15	14
13	Mitsuboshi Diamond Industrial Co., Ltd	124	151	138	11	11
14	Micronic Laser Systems AB	122	120	85	14	12
15	Micronics Japan Co., Ltd.	111	142	83	12	13

<sup>†</sup>Includes revenues from display related manufacturing system sales, service and support.

The sales values shown in the table above include revenues realized from the sale of panel processing equipment, test and related equipment, and assembly equipment, plus the value of service and support.

The display equipment industry, however, took a step back in 2006 as overall revenues declined 5% to \$7.7B. Panel display manufacturers built up too much capacity and inventories, which lessened the demand for display equipment in the second half of 2006.

The combined revenue of the Top Ten Display equipment suppliers declined slightly from \$6.1B in 2005 to \$6.0B in 2006. Two companies registered sales increases of 20% or more, led by **Applied Materials** at 31%. **Shibaura Mechatronics** followed at 25%. Both **Ulvac** and **Tokyo Electron** enjoyed sales increases above 10%. On the opposite end, there were a handful of companies which experienced market contraction. **Canon**'s sales fell 45%. Sales decreased 13% for **Hitachi Plant Technologies**, and 11% for **Hitachi High-Technologies**.

**Photon Dynamics**, **Orbotech**, **Mitsubishi Diamond Industrial**, **Micronic Laser** and **Micronics Japan** rounded up the next five spots to make up the top 15. The combined revenues of the top 15 companies totaled \$6.6B, down 1% from previous year.

The data in this press release were extracted from VLSI Research's advisory titled 2006 top Ten Equipment Suppliers to the Flat Panel Display Industry published in May 2007. Details on this report and other VLSI studies can be found by visiting the website at [www.vlsiresearch.com](http://www.vlsiresearch.com).

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