

VLSIresearch - Critical Subsystems and Components Service Overview

The market for Critical Subsystems and Components for use in the semiconductor and related manufacturing equipment has emerged to become an important industry, worth over \$17Bn annually.

Critical Subsystems are defined as high technology and high value products, such as vacuum pumps, vacuum valves and power supplies, that actively affect the processing or handling of substrates during manufacturing. Critical Components are highly engineered materials or products that have been developed to deal with the demanding manufacturing conditions associated with the semiconductor and related industries. The suppliers of Critical Subsystems and Components have been instrumental in providing many of the enabling technologies that have allowed equipment manufacturers and device makers to advance to successive generations of processing equipment.

VLSIresearch's Critical Subsystems and Components Service is offered as an annual subscription with regular updates throughout the 12-month period. It provides subscribers with access to an online database of industry research and information to assist with strategic planning decisions and marketing communications. Companies which are currently benefiting from this service occupy all parts of the supply chain from the financial community and device manufacturers through to the equipment, subsystems, components and materials suppliers.

Service Overview

The service is available in two versions: “Market Leader” and “Driving Forces”.

		Driving Forces	Market Leader
		5 User Passwords	10 User Passwords
Database Access	<i>Market Leader Database</i>	✗	✓
	<i>Driving Forces Database</i>	✓	✓
	<i>300mm Fab Database</i>	✓	✓
Market Perspectives	<i>Monthly Graphics Files</i>	✓	✓
	<i>Forecast Overview</i>	✓	✓
Appraisals	<i>Appraisals relating to driving forces and critical component markets</i>	✓	✓
	<i>All Appraisals relating to critical subsystems and components</i>	✗	✓
Support	<i>Enquiries</i>	5 hours	10 hours
	<i>Decision Making Support</i>	✗	✓
	<i>Site Visit</i>	✗	✓
	<i>Marketing and Comms Support</i>	✗	✓
	<i>Proprietary support</i>	Upon request	Upon request

Feature Descriptions

Databases

Market Leader Database

The Market Leader database contains market share data for over 35 major critical subsystems and components segments (including Service & Support) relevant to the semiconductor, display, and solar cell manufacturing industries. Market share data for the previous five years is published on the online database. Historical market share data further than five years is available upon request.

Major Critical Subsystems and Components Segments

- Mass flow Controllers
- Integrated Process Diagnostics
- Residual Gas Analyzers
- FTIR Gas Analysis
- Liquid Analysis
- Particle Measurement Subsystems
- Integrated Wafer Metrology
- DUV Photolithography Sources
- Lens Subsystems
- DC Process Power
- RF Power Supplies
- RF Power Matching Networks
- Microwave Power Subsystems
- Power Instrumentation
- Fluorine Gas Generators
- Chillers
- Heat Exchangers
- Temperature Measurement
- Dry Pump
- Turbomolecular Pump
- Cryopump
- Pressure Gauges – Capacitance
- Pressure Gauges – Electronic
- Vacuum Robots
- Atmospheric Robots
- Wet Robotic Subsystems
- Linear Motion Subsystems
- Ozone Generating Subsystems
- Helium Backside Cooling Subs.
- Vapour Delivery Subsystems
- Gas Panels
- Point of use Abatement Subs.
- Ceramics
- Elastomer Seals

Driving Forces Database

The driving forces database contains all the information required to identify the size of potential markets for critical subsystems and components in semiconductor, display, data storage, and PV solar manufacturing equipment.

Driving Forces Database	
Critical Subsystems and Components	<ul style="list-style-type: none"> • 5 years revenue history and forecast for over 35 critical subsystem and component segments • Broken out by Total, Semi, FPD and Solar applications
Driving Forces: Equipment Demand (Semi, FPD, Solar PV)	<ul style="list-style-type: none"> • 5 years revenue history and forecast for each of the major equipment segments • 5 years unit demand history and forecast by equipment type • 5 years unit demand history and forecast by process chamber type • 5 years installed base history and forecast of equipment by equipment type • All of the above are broken out by Total, Semi, FPD and Solar PV applications
Driving Forces: End Consumer Demand	<ul style="list-style-type: none"> • Electronics • Semiconductors • Flat Panel Displays

300mm Fab Database

Lists over 100 active and planned fabs and includes information on location, capacity, capital expenditure, status, product type, and technology node.

Market Perspectives

Monthly Graphics Files

These are Excel spreadsheets containing the very latest forecasts and a series of industry health indicators such as equipment book-to-bill ratios, equipment utilization rates, inventory levels, and an industry 'weather forecast'. The weather forecast allows for a qualitative week-by-week comparison of the industry sentiment giving readers early sighting of any industry changes. This file is updated monthly.

Forecast Overview

This report provides information on what changed, why, and what this means for your business.

Appraisals

Appraisals are short advisories covering industry, market, and technical trends. Up to three years of previously published appraisals are accessible in the online databank as part of both the Driving Forces and Market Leader subscriptions.

Appraisals are added throughout the year on topics chosen according to their relevance to current market issues. Currently available appraisals include: Critical Subsystems regional analysis; semiconductor bill of materials analysis; supply chain commentary; Chinese OEMs; MEMs market analysis and LED market analysis.

Support

Decision Making Enquiries

Market Leader subscribers may request assistance with decisions or further explanation of the market data. The level of effort includes database and library searches that can typically be accessed within 15 minutes. Up to 10 hours of enquiries are included with the Market Leader subscription and up to 5 hours are included with the Driving Forces subscription. Requests are typically handled within 24 hours excluding non-business days. Additional support may be purchased.

Marketing Communications

Market Leader subscribers may call or email VLSIresearch for marketing and communications assistance. VLSIresearch can work with your marketing and communications personnel on topics ranging from simple fact checking to complex corporate positioning issues.

Site Visit

A visit to your company allows VLSIresearch or one of its affiliates to view your operations and new products. It also allows executives at your company to discuss issues and trends in the industry in a private and interactive format. VLSIresearch will endeavor to visit each Market Leader client once a year. Additional visits can be arranged for an additional fee.

Proprietary Support

VLSIresearch can undertake additional research to meet the specific proprietary needs of clients. The cost of such work will be quoted on request.

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