

# SEMI PV Group & Yole Worldwide PV Equipment Data Collection Program

*Global Bookings and  
Billings Data Collection  
Program for PV Equipment*



# The History of Market Data Programs at SEMI

- **Semiconductor Capital Equipment – since 1991 (monthly)**
  - Worldwide Semiconductor Equipment Market Statistics (WW SEMS)
    - In cooperation with Semiconductor Equipment Association of Japan (SEAJ)
    - ~150 participating companies
    - Covers bookings (3-mo. avg.) and billings (actual) by 23 categories and seven end-market regions
- **SEMI North American Book to Bill (monthly)**
- **Mass Flow Controller Sales (monthly)**
- **Semiconductor Wafer Shipments (monthly) and Revenues (quarterly)**
- **Polysilicon Shipments (quarterly)**
- **Photoresist, Ancillary Chemicals, and Electronics Gas Sales (quarterly)**
- **Leadframe Shipments (monthly)**

# About Yole Développement

- Yole Développement is a market research and strategy consulting company, founded in 1998.
- Involved in photovoltaic industry, MEMS, advanced packaging and compound semiconductor.
- In addition to custom analysis, Yole Développement also publishes reports and a newsletter for the PV industry:



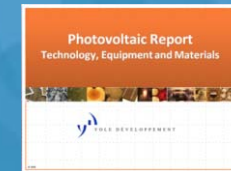
PV manufacturing news



PV Fab database



Cost simulation tool



PV Technology Equipment and Material report

- Yole Développement has 20 full-time analysts, with both technical and marketing/management background, operating worldwide

# Why a Data Program for PV Equipment?

- Interest in providing timely and credible global information about the growing PV equipment market
  - For market analysis
  - For competitive analysis
  - For use in financial and PR communications

# PV Equipment Data Program Advantages

## SEMI PV Group

- Global presence and connections
- Existing data collection infrastructure
- Growing membership and program activity in PV ([www.pvgroup.org](http://www.pvgroup.org))

## Yole

- Strong analyst team and active presence in tracking and analyzing the PV market
- Global PV client base along the whole PV value chain – including cell and module makers.

# PV Equipment Data Program

## *Suggested Categories to Start With*

### **Initial categories may include:**

- Diffusion furnace
- Firing furnace
- Laser scribes
- MOCVD tools
- Module laminator
- PECVD for thin films
- Screen printers
- SiN coater
- Sputtering for thin films
- Tester and sorter
- Metrology
- Wet Bench
- Wafer Manufacturing
- Automation and Wafer Handling
- Equipment Subsystems and Components

*Final categories to be determined by interest of participants*

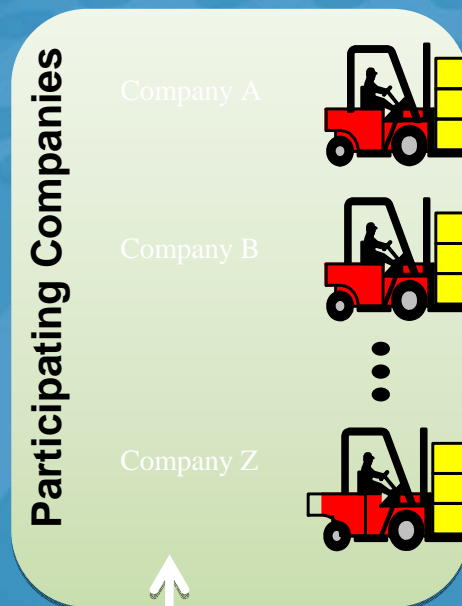
# PV Equipment Data Program

- Collected and issued quarterly
- Begins with the IQ 2009 bookings and billings data
- Report published in May (Subsequent reports to be issued in August, November, & February)
- Quarterly equipment market data report is **free to the participants.**
- Quarterly market analysis by Yole made available to participants
  - \$900 annually for SEMI PV Group members and \$1,500 annually for non-SEMI members
- Non-participants may also subscribe to the quarterly market data report and the quarterly analysis by Yole.

# Methodology for Data Collection

1. Proprietary company data input directly to independent accounting firm  
*sent every quarter*

2. Data aggregated and company confidentiality insured



4. Quarterly Data and Industry summary report prepared  
*released every quarter*  
(Worldwide PV Equipment Market Statistics Report)

3. Reports & analysis produced and distributed  
*released every quarter*



# Confidentiality is Key

- Individual company data available to independent accounting firm only
- Dedicated computer at the accounting firm
- Minimum of three companies must participate in any category
- Employ 75 percent market share exclusion rule

***Neither SEMI PV Group nor Yole will see or have access to individual company data***

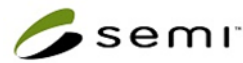
# What Your Company Will Receive For Participating

Each quarter,

- An Excel-based Worldwide PV Equipment Market Statistics Report
  - Detailing the market billings and orders for PV equipment by category and by region where the equipment is sold into (these are to be defined)
  - A three to five page PowerPoint based analysis from Yole

***Access to timely and accurate information!***

# Worldwide PV Equipment Market Statistics Report- Sample Format



**Worldwide PV- 2009 Billings**  
**Worldwide Photovoltaic Equipment Market Statistics by Category and By Region**  
 (U.S. DOLLARS IN THOUSANDS, ACTUAL BILLINGS)

|                        | 1Q09             | 2Q09             | 3Q09             | 4Q09             | Total              |
|------------------------|------------------|------------------|------------------|------------------|--------------------|
| <b>Total Equipment</b> |                  |                  |                  |                  |                    |
| Europe                 | \$55,680         | \$48,000         | \$55,680         | \$36,048         | \$195,408          |
| North America          | 194,972          | \$97,484         | 194,972          | \$192,842        | \$680,270          |
| Asia                   | 209,756          | \$72,088         | 209,756          | \$182,957        | \$674,557          |
| ROW                    | 14,228           | -\$1,432         | 14,228           | \$11,172         | \$38,196           |
| <b>Total</b>           | <b>\$474,636</b> | <b>\$216,140</b> | <b>\$474,636</b> | <b>\$423,019</b> | <b>\$1,588,431</b> |
| <b>Category 1</b>      |                  |                  |                  |                  |                    |
| Europe                 | \$4,640          | \$4,000          | \$4,640          | \$3,004          | \$16,284           |
| North America          | 16,248           | \$8,124          | 16,248           | 10,474           | \$51,093           |
| Asia                   | 17,480           | \$6,007          | 17,480           | 12,296           | \$53,262           |
| ROW                    | 1,186            | -\$119           | 1,186            | 931              | \$3,183            |
| <b>Total</b>           | <b>\$39,553</b>  | <b>\$18,012</b>  | <b>\$39,553</b>  | <b>\$26,704</b>  | <b>\$123,822</b>   |
| <b>Category 2</b>      |                  |                  |                  |                  |                    |
| Europe                 | \$4,640          | \$4,000          | \$4,640          | \$3,004          | \$16,284           |
| North America          | 16,248           | \$8,124          | 16,248           | 20,000           | \$60,619           |
| Asia                   | 17,480           | \$6,007          | 17,480           | 12,296           | \$53,262           |
| ROW                    | 1,186            | -\$119           | 1,186            | 931              | \$3,183            |
| <b>Total</b>           | <b>\$39,553</b>  | <b>\$18,012</b>  | <b>\$39,553</b>  | <b>\$36,231</b>  | <b>\$133,348</b>   |
| <b>Category 3</b>      |                  |                  |                  |                  |                    |
| Europe                 | \$4,640          | \$4,000          | \$4,640          | \$3,004          | \$16,284           |
| North America          | 16,248           | \$8,124          | 16,248           | 20,000           | \$60,619           |
| Asia                   | 17,480           | \$6,007          | 17,480           | 12,296           | \$53,262           |
| ROW                    | 1,186            | -\$119           | 1,186            | 931              | \$3,183            |
| <b>Total</b>           | <b>\$39,553</b>  | <b>\$18,012</b>  | <b>\$39,553</b>  | <b>\$36,231</b>  | <b>\$133,348</b>   |
| <b>Category 4</b>      |                  |                  |                  |                  |                    |
| Europe                 | \$4,640          | \$4,000          | \$4,640          | \$3,004          | \$16,284           |
| North America          | 16,248           | \$8,124          | 16,248           | 20,000           | \$60,619           |
| Asia                   | 17,480           | \$6,007          | 17,480           | 12,296           | \$53,262           |
| ROW                    | 1,186            | -\$119           | 1,186            | 931              | \$3,183            |
| <b>Total</b>           | <b>\$39,553</b>  | <b>\$18,012</b>  | <b>\$39,553</b>  | <b>\$36,231</b>  | <b>\$133,348</b>   |
| <b>Category 5</b>      |                  |                  |                  |                  |                    |
| Europe                 | \$4,640          | \$4,000          | \$4,640          | \$3,004          | \$16,284           |
| North America          | 16,248           | \$8,124          | 16,248           | 10,474           | \$51,093           |
| Asia                   | 17,480           | \$6,007          | 17,480           | 30,000           | \$70,967           |
| ROW                    | 1,186            | -\$119           | 1,186            | 931              | \$3,183            |
| <b>Total</b>           | <b>\$39,553</b>  | <b>\$18,012</b>  | <b>\$39,553</b>  | <b>\$44,409</b>  | <b>\$141,526</b>   |

# What We Need from Your Company

1. Identify the equipment category types where your company will provide data.
2. Identify a contact person at your company who will provide data and who will receive the report each quarter.
3. Once #2 and #3 are determined, SEMI PV Group will have its financial firm provide your company an input sheet to be used for submitting data.
4. When data collection takes place, send your company's data by the 30th of each month following the calendar quarter.
  - a) For example, send IQ 2009 data by April 30th
  - b) Send data directly to [aasemidata@netgate.net](mailto:aasemidata@netgate.net) or fax: 1.650.357.6051
5. If there is a reason for a reporting delay, please contact SEMI PV Group.
6. Notify SEMI PV Group if there is a change in the contact person at your company.

# PV Equipment Categories by Equipment Segment

## Suggested PV Equipment Segments

Automation and Wafer Handling  
Diffusion Furnace  
Equipment Subsystems & Components (i.e. MFC)  
Firing Furnace  
Laser Scribes  
Metrology  
MOCVD Tools  
Module Laminator  
PECVD for Thin Films  
Screen Printers  
SiN Coater  
Sputtering for Thin Films  
Testers and Sorters  
Wet Benches  
Wafer Manufacturing (crystal pullers, saws, etc.)  
Other Suggested or Recommended Categories?

Can your company submit  
data for this category?

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

Yes/No

# PV Equipment Categories

## Regions to Report

### Country or Region

### Can your company submit separate data for this country or region?

Europe (inc. Middle East)

Yes/No

Japan

Yes/No

North America

Yes/No

China

Yes/No

Taiwan

Yes/No

Rest of World

Yes/No

Other?

Yes/No

# Participate Now!

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Interested in participating or learning more?

Contact us at [mktstats@semi.org](mailto:mktstats@semi.org).