Semicon West, 2003

The Back-End Leads the Recovery

A Breakfast Briefing for the Packaging, Test and EMS Industry

Friday, July 18, 2003 7:30 AM - 9:30 AM

Gartner Dataquest Global Events Center

251 River Oaks Parkway, San Jose, California

2002 was better than 2001, but didn't have the strength to get the semiconductor industry moving. As we enter the second half of 2003, are we finally going to see the significant growth for which we have waited almost 3 years? Will the entire electronics industry develop the momentum that led to double-digit growth in 2002 for packaging and assembly? Is the transition to newer packaging schemes and return to outsourcing enough to grow packaging and test even more this year? Is demand returning so that the EMS industry can thrive again?

In these uncertain times, you need accurate, reliable market intelligence that strategically guides you in the right direction. At this breakfast briefing, attendees will hear Dataquest analysts provide you the answers to these and other pointed industry questions by providing precise, productive, and critical information to help in your business decision-making process.

Agenda

7:00 a.m.  Registration

7:45 a.m  Welcome and Introduction - Jim Walker, VP Research

7:50 a.m  Outlook for Semiconductor Manufacturing: Ready, Set, Go?

Klaus Rinnen, Managing VP

In the wake of the Iraq situation, uncertainty is turning into certainty at increased pace. So, there is renewed hope for economic recovery. With inventory issues under control and utilization improving, the semiconductor industry is poised for expansion when corporate spending returns.

- What is the demand picture for 2003 and beyond?
- What is the state of the manufacturing industry and its suppliers?
- What is the capacity status of the industry?
- Are there any risks and success factors for the next upcycle?
8:05 a.m.  **Packaging is Leading the Recovery**  
Jim Walker, VP Research

2002 saw the packaging and assembly outsourcing industry grow 18 percent, while the semiconductor industry, as a whole, grew a meager 1 to 2 percent. Is it more than coincidence that this growth phase in packaging parallels the other major industry recession of 1985 to 1987? How similar is transition to the “third wave” of array and stacked packaging to the transition from through-hole to surface mount packages which occurred also in the 1985 to 1987 time period? Do the convergence of electronics manufacturing processes parallel history as well?

- What is the Semiconductor Packaging forecast for the upcoming years?
- What role will the convergence of packaging and board level assembly play in the future of high-tech manufacturing and the growing MEMS industry?
- Is the new "killer" application really an application? Or, is it a technology?

8:25 a.m.  **Packaging Market Trends-Structural Changes Brought by System-in-Package**  
Masao Kuniba, Principal Analyst

System In Package (SIP) is the critical technology to survive transient markets. IDMs and SATS providers must take a more compound and flexible approach to invigorate the packaging and assembly market. Describing the overall market trends based on Package Forecast by package type.

- What affect will SIP have on the packaging market?
- Will system-in-package demand spark renewed growth in the multi-functional Mobile Electronics Industry and who will the manufacturer be?
- What is the growth of the Semiconductor Assembly and Test Services (SATS) Market?

8:45 a.m.  **The Road Ahead for ATE: Bumpy Ride or Smooth Sailing?**  
Laurie Balch, Principal Analyst

The ATE industry is still languishing in the doldrums of the semiconductor downturn. Even as the market begins to improve, the test business faces a number of challenges in both changing business and technological dynamics. As the market upturn develops, how a company reacts will determine its success for years to come.

- Who are the major players in the ATE test market?
How will the changing business and technological dynamics impact the ATE industry?

What must vendors do to succeed in the new market arena?

What approaches should customers evaluate for tackling their future test needs?

9:05 a.m.  
**Is There A Glass Ceiling for EMS?**  
Al Velosa, Associate Director, Consulting

The Electronic Manufacturing Services (EMS) total available market (TAM) is traditionally estimated using the aggregate cost of goods sold for electronic equipment. However, due to business, economic and proprietary technology reasons, OEMs may not outsource some of their components and materials. This would imply that there may be a "Glass Ceiling" for EMS firms that is lower than the traditional TAM. The implications this may have upon the growth and business of the EMS industry will be explored.

- What size and projected growth rates are expected for the EMS industry in the future?
- How will the EMS firms modify their core capabilities and business models maintain their market share?
- How will the ODM business model effect the EMS industry?

9:25 a.m.  
Wrap Up and Final Comments - Jim Walker, VP Research

9:30 a.m.  
Adjourn
REGISTER

The cost of this Briefing is US $75.

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