



FUTURE HORIZONS Presents

2009 Industry Forecast Seminar Annual Briefing

*Concerned About The Industry Outlook
for 2009 and Beyond?*

Get The Proven Experts View At Future Horizons'
Annual Forecast Of The European & Worldwide
Semiconductor Industry (IFS2009)

A Focused Industry Briefing From

Future Horizons

The Global Semiconductor Industry Analysts

Seminar Programme Includes:

- **2009 Market Update ...**
The Key Factors Analysed
- **2010 Industry Outlook ...**
Blue Skys Or Continuing Stormy?
- **Industry Application Drivers ...**
IC Content & Forecast
- **Supply & Demand ...**
Wafer Fab Capacity Trends
- **Market Outlook ...**
5-Year Regional & Product Forecasts



Tuesday Jan 27, 2009

Hilton London Olympia Hotel, London, England

Future Horizons Ltd, • 44 Bethel Road • Sevenoaks • Kent TN13 3UE • England
Tel: +44 1732 740440 • Fax: +44 1732 740442

Affiliates in Tokyo, Japan, Israel & San Jose, California, USA

e-mail: mail@futurehorizons.com • www.futurehorizons.com

In Russia, Tel: +7 459 155 4635

Who Should Attend?

This Forum Is Vital For Executives Responsible For:

- Market Research & Marketing
- Strategic Marketing & Planning
- Executive Management
- Purchasing & Acquisition
- Finance & Administration
- Sales & Distribution Channels
- Investment & Banking
- Engineering & Design
- Project Management
- Government Organisations
- Business & Technical Press

Topics To Be Reviewed Include:

- World Economic Environment
- Analysing The Industry Cycles
- 2009 Growth Prospects
- Semiconductor Market 5-Year Forecast
- Key Application Markets
- Industry Capacity & Investment
- Regional Overview
- Market Trends & Outlook

For your travelling convenience, the seminar will be held from 10:30 AM until 4:00 PM inclusive. The Hilton London Olympia Hotel is a 20-minute taxi ride from Paddington Station, connecting with the Heathrow Express. Kensington Olympia is the nearest underground station, a 3 minute walk from the hotel. Lunch is included with the seminar. Registration and coffee is from 10:00 AM in the seminar room.

Get The Inside View At The Annual IFS 2009

The semiconductor industry is a volatile business where insights, experience and professionalism are key. Strategically timed at the beginning of the year, the Annual Industry Forecast Seminar summarises and presents the extensive research capability of Future Horizons industry analysts. Now in its eleventh year, the annual forecast seminars are a vital link in our charter to provide industry with high quality, cost effective, market research. Whether a seasoned veteran or industry newcomer, this seminar is invaluable to executives from the semiconductor, electronics and related industries. Delegates will receive copies of all the material presented in both binder and CD-ROM format.

*Meet the analysts - Get the facts - Hear the arguments -
Make your judgements - Justify your positions*

There Is No Better Way To Stay Well Informed

Seminar Contents

The 2008 chip market was the fourth successive year of single digit growth. Just when it looked like things were starting to get better, the financial markets imploded pushing the world to the brink of a major economic recession. The advanced economies already are struggling in recession, but the emerging regions are still growing, albeit at a more moderate pace. Can their strength offset the rich world's decline?

A slowing economy usually kills IC unit demand and softens ASPs, yet fab capacity is tight and Cap Ex very weak. Will these two effect counter balance each other to cushion the blow?

Wafer Fab Cap Ex was down 20 percent on 2007, to only 15 percent of sales, despite the industry running at 90+ percent utilisation levels. This is the first time ever investment has been cut back when capacity is 'full'. On current sentiment, 2009 Cap Ex will be cut back a further unprecedented 10 percent. The 2009 slowdown will help stretch existing capacity further ... were these cutbacks a stroke of good luck or are we building a massing future undersupply problem?

IC ASPs fell less steeply during 2008, helping them recover on a annualised basis. The economic slowdown will clearly put pressure on pricing but are the structural trends strong enough to offset this impact? If prices continue to fall, will poor profitability force some firms to fall on their sword?

There are many more questions ... get the answers from the experts. The analyses presented at our previous industry briefings have proved both accurate and informative, and this event promises to be no exception.

Sign Up Now ... Get The Proven Experts' View

44 Bethel Road ' Sevenoaks ' Kent TN13 3UE ' England ' Fax: +44 1732 740442 ' In Russia, Tel: +7 495 155 4635

Registration Information

**Please Register Me
For The Following
The IFS 2009**

**Send Completed Form By Fax/Mail [Or
Online @ www.futurehorizons.com](mailto:Online@www.futurehorizons.com)**

Hilton London Olympia Prices & Information

Please use [this link for the](#) Hotel Reservation form to take advantage of the special discounted seminar room rate. This rate is NOT available if you book directly with the hotel. Accommodation is NOT included in the seminar fee.



Rates per room per night including English Breakfast But NOT UK VAT
Standard Room - UK £129
Deluxe Guest Room - UK £169
(£40 supplement)
Double Occupancy £10 supplement

Registration

Registration should be made using this form - please copy for additional delegates to qualify for the group discount. Participation is subject to space availability.

Please register early to ensure seminar availability

Group Discounts

10% group discount price applies to three or more delegates from the same facility registering at the same time with the registration fee paid on a single invoice.

Cancellations

Cancellations made less than two weeks prior to the seminar are subject to a 50% cancellation fee and must be confirmed in **writing**, otherwise the full seminar fee will apply. Refunds will not be granted after the seminar date or for no-shows. Substitutions may be made at any time up to the seminar date and confirmed in writing to Future Horizons.

In the unlikely event that the seminar is cancelled, delegates will be notified and all fees paid will be refunded in full.

Payment can be made by cheque (drawn on a **UK bank only**), or by bank transfer to:
Future Horizons Ltd, Royal Bank of Scotland, 3a Edinburgh Road, Portsmouth,
PO1 1DA, UK, Sort Code: 16:28:24 Account No: 11686316

Seminar	Date Venue	Check Box
Tues 27 Jan 2009	Hilton Olympia Hotel, London	
If you cannot attend, Seminar Proceedings are available on request NB. Payments In UK Pounds Sterling Only		

Delegate Details (Or Attach Business Card)

Full Name <i>Mr/Ms/Mrs</i>		
Job Title		
Company		
Full Postal Address		
Post Code		
VAT/TVA/MWS/IVA No.		
(Please Note - This Must Be Supplied)		
PO No.		
Phone	Fax	
E-mail		
Special Diet?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If "Yes", specify:
Overnight Hotel?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If "Yes", see information left

Registration Fee (Per Delegate)

Standard Rate	£495.00	VAT @ 15% £74.25	Total Fee £569.25
Group rate (3 or more)	£445.00	VAT @ 15% £66.75	Total Fee £511.75
Proceedings Only (Inc P&P)	£415	VAT @ 15% NA	Total Fee £415.00

An invoice will be sent by fax/email on receipt of seminar registration.

Pre-Payment Mandatory Payment by UK Cheque: ☐ or Bank Transfer: ☐

All Seminars Must Be Pre-Paid IN FULL

It is the delegate's responsibility to ensure that payment has been made.

The registration fee includes instructional costs, course presentation binder material, coffee breaks and lunch. Accommodation at the hotel is NOT included.

If overnight hotel is required, please see the information (left) and use this reservation form to make your booking.

UK VAT APPLIES TO ALL UK-BASED SEMINARS

US Affiliate:

Pathfinder Research

13901 North 73rd Street, Suite 205
Scottsdale, Arizona 85260, USA
Tel: + 1 480 348 1133
Fax: + 1 480 348 9745
hfeeney@pathfinder-research.com

Russian Affiliate:

Electronintorg Ltd

20 Usievicha Street
125190 Moscow, Russia
Tel: +7 459 155 4635
Fax: + 7 495 787 3869
elersm@mail.ru

Israel Affiliate:

Amir Ben Artzi Content & Media

40 Derech Hayam St.
Havatzelet Hasharon, 42937 Israel
Tel: + 972 73 7367966
Fax: + 972 9 8665799
amir@amircm.com

Far East Affiliate:

Semicon Research Ltd

Kagami Ishi Bldg., 1-11-7, Bunkyo-Ku
Yushima, Tokyo 113, Japan
Tel: + 81 3 5684 3941
Fax: + 81 3 5684 3943
o_ohtake@semiconresearch.com

Future Horizons Ltd, • 44 Bethel Road • Sevenoaks • Kent TN13 3UE • England

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e-mail: mail@futurehorizons.com • www.futurehorizons.com