

Agenda

Industry Forecast Seminar 2011

14th July, Crown Plaza, Heathrow

10.15
Official Registration & Coffee

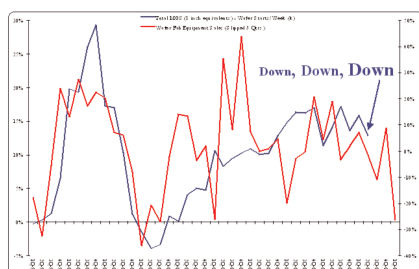
10.30
Welcome & Introduction

10.45
Economic Outlook
* Current world status/outlook * 2011 World GDP Contributions * World GDP Growth Trends Comparison of advanced & emerging economies * Oil and Interest Rate trends * Economic outlooks for: US, China, Japan, Eurozone & India

11.15
Semiconductor Industry Outlook
* Current Industry Status and Outlook * Key Market Drivers * Industry Issues

12.00
Industry Capacity
* Manufacturing basics * SC Equipment sales trends * New capacity Vs Wafer Capacity Ex spend * Capital spend & SC market compared * MOS capacity build out by wafer size * much much more...

13.00
Seminar Lunch



14.00
Key Application Markets
* TV's * Set Top Boxes * Automotive * Near Field Communication * Smart Metering * Medical* Solid State Lighting * Mobile Phones * Smart Phones * Computing * PC Market

14.45
Coffee Break

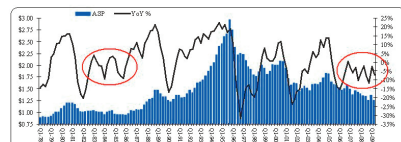
15.00
Key Application Markets Continued

15.30
European Semiconductor Market
* Regional Overview including: Europe, Japan, USA, Russia/CIS * Industry Summary

15.45
Forecast Summary & Closing Remarks

16.00
Wrap Up

NB: Agenda is subject to change



IC ASP Growth Rate Peaks & Troughs, 1978-2007				IC ASP Growth Rate Transitions, 1978-2007			
Low To High	Qtr	High To Low	Qtr	Low To High	Qtr	High To Low	Qtr
Q1-78	1	Q1-83	1	Q1-78 to Q4-80	11	Q4-83 to Q1-82	3
Q1-82	16	Q4-84	16	Q1-83 to Q4-86	27	Q4-86 to Q1-89	3
Q1-86	33	Q4-84	26	Q1-86 to Q4-84	19	Q4-84 to Q4-86	3
Q4-86	27	Q3-80	27	Q4-86 to Q3-80	15	Q3-80 to Q3-80	4
Q1-80	13	Q1-85	18	Q3-80 to Q1-85	14	Q1-85 to Q1-86	4
Q1-86	33	799	799	Q1-86 to 799	799	799	799
Range: 48 Years Range: 47 Years				Range: 37 Years Range: 12 Years			