

SMC027G – Table of Contents

INTRODUCTION	XXII
STUDY GOALS AND OBJECTIVES	XXII
REASONS FOR DOING THE STUDY	XXII
INTENDED AUDIENCE	XXII
SCOPE OF REPORT	XXIII
METHODOLOGY	XXIV
INFORMATION SOURCES	XXIV
ANALYST’S CREDENTIALS	XXIV
RELATED BCC REPORTS	XXIV
BCC ONLINE SERVICES	XXV
DISCLAIMER	XXV
SUMMARY	XXVI
SUMMARY TABLE VALUE OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY MARKETS, THROUGH 2013 (\$ MILLIONS)	XXVII
SUMMARY FIGURE GLOBAL VALUE OF THE CVD, ION IMPLANTATION, AND EPITAXY MARKETS, THROUGH 2013 (\$ MILLIONS)	XXVII
OVERVIEW	1
THIN FILM DEPOSITION PROCESS STATUS	1
TABLE 1 STATUS OF MAJOR DEPOSITION STUDIES BY BCC RESEARCH	2
DEPOSITION TECHNOLOGIES COVERED IN THIS REPORT	2
TABLE 2 KEY THIN FILM TECHNOLOGIES INCLUDED	3
MAJOR APPLICATIONS	3
TABLE 3 KEY APPLICATIONS OF THIN FILM TECHNOLOGIES BY MARKET	4
CLASSIFICATION OF MATERIALS	4
TABLE 4 TYPICAL MATERIALS AND THEIR APPLICATIONS	5
INDUSTRY STRUCTURE	6
INDUSTRY STRUCTURE	6
TABLE 5 KEY COMPANIES IN THE CVD, ION IMPLANTATION, AND EPITAXY BUSINESS	7
TABLE 5 (CONTINUED)	8
THIN FILM INDUSTRY CHANGES	9
TECHNOLOGY CONTINUES TO EXPAND IN CHINA	9
MERGER AND ACQUISITION TREND CONTINUES	10
GLOBAL CVD, ION IMPLANTATION, AND EPITAXY MANUFACTURING	10
TABLE 6 ESTMATED GLOBAL MANUFACTURING OFCVD, ION IMPLANTATION, AND EPITAXY EQUIPMENT (%)	10
FIGURE 1 ESTIMATED GLOBAL CVD, ION IMPLANTATION, AND EPITAXY MANUFACTURING, 2007-2013 (%)	11
GLOBAL CONSUMPTION OF CVD, ION IMPLANTATION, AND EPITAXY EQUIPMENT	12
TABLE 7 GLOBAL SHARE OF CVD, ION IMPLANTATION, AND EPITAXY CONSUMPTION, 2007-2013 (%)	12

FIGURE 2 GLOBAL SHARE OF CVD, ION IMPLANTATION, AND EPITAXY CONSUMPTION, 2007-2013 (%)	13
MARKET SHARES	13
TABLE 8 MARKET SHARES OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY MANUFACTURERS, 2007	14
COMPANY PROFILES	14
AIXTRON, AACHEN, GERMANY	15
AMEC INC., SHANGHAI, CHINA	15
APPLIED MATERIALS, INC., SANTA CLARA, CA	16
ASM INTERNATIONAL, THE NETHERLANDS	17
CVD EQUIPMENT CORPORATION, RONKOKOMA, NY	18
IBIS TECHNOLOGY CORPORATION, DANVERS, MA	18
IMPLANT SCIENCES CORPORATION, WAKEFIELD, MA.	19
NOVELLUS SYSTEMS, INC., SAN JOSE, CA	20
OERLIKON BALZERS, KOLN, GERMANY	20
OXFORD INSTRUMENTS, OXON, UNITED KINGDOM	21
RIBER COPORATION, BEZONS CEDEX, FRANCE	22
RICHTER PRECISION, INC., EAST PETERSBURG, PA	22
TOKYO ELECTRON LIMITED, TOKYO, JAPAN	23
ULVAC TECHNOLOGIES, INC., METHUEN, MASSACHUSETTS	24
VARIAN SEMICONDUCTOREQUIPMENT ASSOCIATES, GLOUCESTER, MA	24
VEECO INSTRUMENTS, INC., WOODBURY, NY	25
THIN FILM TECHNOLOGY	26
CVD TECHNOLOGY	26
BASIC THERMAL CVD	26
TABLE 9 KEY TECHNICAL ADVANTAGES OF THE CVD PROCESS	27
Coating Technology	28
METALLO-ORGANIC CVD	29
TABLE 10 KEY TECHNICAL ADVANTAGES OF MOCVD	30
ATMOSPHERIC PRESSURE CVD	30
TABLE 11 MAJOR ADVANTAGES OF THE APCVD PROCESS	31
LOW-PRESSURE CVD	31
PLASMA-ENHANCED CVD	31
TABLE 12 KEY ADVANTAGES OF PLASMA-ENHANCED CVD	32
HIGH-DENSITY PLASMA CVD	32
TABLE 13 MAJOR TECHNICAL ADVANTAGES OF HDP-CVD	33
TEOS Ozone Chemistry	34
TABLE 14 KEY TECHNICAL ADVANTAGES OF TEOS/OZONE CHEMISTRY	34
DEVELOPMENTS THAT ARE EXPANDING CVD	35
CARBON NANOTUBES AND CVD	35
CLUSTER TOOLS	36
Definition	36
Advantages	36
TABLE 15 TECHNICAL ADVANTAGES OF CLUSTER TOOLS	37

ION IMPLANTATION TECHNOLOGY	37
TABLE 16 KEY TECHNICAL ADVANTAGES OF ION IMPLANTATION	38
BEAMLIN ION IMPLANTATION	39
TABLE 17 KEY ADVANTAGES OF BEAMLIN IMPLANTATION	39
PLASMA IMMERSION ION IMPLANTATION (PIII)	39
TABLE 18 KEY ADVANTAGES OF PIII	40
ION-ASSISTED DEPOSITION	41
Ion Beam-Assisted Deposition (IBAD)	41
TABLE 19 KEY TECHNICAL ADVANTAGES OF IBAD/PIIID	42
EPITAXY	42
MOLECULAR BEAM EPITAXY (MBE)	43
TABLE 20 MAJOR TECHNICAL ADVANTAGES OF MBE	43
Metal Organic Chemical Vapor Deposition (MOCVD)	44
DEVELOPMENTS THAT COULD EXPAND ION IMPLANTATION AND EPITAXY	44
TABLE 21 DEVELOPMENTS THAT COULD EXPAND THE USE OF ION IMPLANTATION AND EPITAXY	44
ANALYSIS OF PATENTS FOR CVD, ION IMPLANTATION, AND EPITAXY	45
PATENTS BY TECHNICAL TOPIC	45
TABLE 22 THIN FILM PRODUCT PATENTS BY TECHNICAL TOPIC, 2005–2007	45
PATENTS BY GLOBAL REGION	46
TABLE 23 CVD, ION IMPLANTATION, AND EPITAXY-RELATED PATENTS BY REGION, 2005–2007	46
PATENTS BY ASSIGNEES	47
TABLE 24 ASSIGNEES WITH THREE OR MORE PATENTS	47
TABLE 24 (CONTINUED)	48
SAMPLE PATENT ABSTRACTS	49
CVD Method for Depositing a High-k Dielectric Film	49
Fabricating Semiconductor Structures with Epitaxially Grown Source and Drain Structures	50
Ion Implantation System with an Interlock Function	50
Ion Implantation used in Silicon-in-insulator Wafer Transfer Process	50
Fabricating Nitride-based Transistors with a Protective Layer and a Low Damage Recess	51
Multicomponent Barrier Layers in Quantum Well Active Regions Enhance Confinement and Speed	51
Multicomponent Barrier ... (Continued)	52
CVD, ION IMPLANTATION, AND EPITAXY MARKETS	53
INDUSTRY APPROACH	53
INDUSTRY COMPETITIVENESS	53
MEASUREMENT OBJECTIVES	54
CVD, ION IMPLANTATION, AND EPITAXY IN THE MICROELECTRONICS MARKET	55
CVD, ION IMPLANTATION, AND EPITAXY	55
MICROELECTRONICS PRODUCT DEFINITION	56

TABLE 25 BASIC PRODUCTS USING CVD, ION IMPLANTATION, AND EPITAXY PRODUCTS	56
CHANGING PRODUCT CHARACTERISTICS	57
TABLE 26 INTEGRATED CIRCUIT CHARACTERISTICS	57
INDUSTRY COMPETITIVENESS OF THIN FILM PROCESSES IN MICROELECTRONICS	58
ECONOMIC CONDITIONS IN MICROELETRONICS	58
TABLE 27 GLOBAL DEMAND FOR KEY MICROELECTRONIC PRODUCTS BY TYPE, THROUGH 2007 (\$ BILLIONS)	58
THIN FILM PRODUCT DEVELOPMENT AND STANDARDS	59
SEMI	59
Impact of Globalization	60
Standards	60
TABLE 28 KEY ADVANTAGES OF STANDARDS	60
SEMATECH	61
Importance to Thin Film Equipment	61
International Technology Roadmap for Semiconductors (ITRS)	61
The Semiconductor Industry Association	62
TABLE 29 CHALLENGES FOR THE SIA	62
GLOBAL ECONOMIC ENVIRONMENT	63
Continued Chip Industry Growth Seen by Many	63
TABLE 30 ECONOMIC IMPACT ON CHIP INDUSTRY, 2008	64
TECHNOLOGY ADVANCES	64
CVD Metal Fill Technology	64
Using Epitaxy to Extend CMOS	65
MICROELECTRONICS COMPETITIVENS S FACTORS	65
Driving Force for CVD, Ion Implantation, and Epitaxy	66
Impact of Market Growth Factors	66
TABLE 31 IMPACT OF MAJOR FACTORS ON THE GROWTH OF CVD, ION IMPLANTATION, AND EPITAXY IN THE MICROELECTRONICS INDUSTRY (%)	67
SEMICONDUCTOR APPLICATIONS FOR CVD	67
MICROELECTRONIC MARKET SEGMENTS	67
CVD APPLICATIONS	67
TABLE 32 BASIC/EMERGING CVD SEMICONDUCTOR APPLICATIONS	68
Changes in Applications with Copper	69
Dielectric Processing Options	69
TABLE 33 CHANGING APPLICATIONS OF CVD FOR SEMICONDUCTORS	70
Impact of Larger Wafer Sizes	70
New Applications—MEMS Devices and Nanotechnology	70
TABLE 34 ADVANTAGES OF CVD IN MAKING CARBON NANOTUBES	71
IMPLANTATION APPLICATIONS FOR SEMICONDUCTORS	71
TABLE 35 SEMICONDUCTOR APPLICATIONS OF ION IMPLANTATION	72
Doping of Integrated Circuits	72
TABLE 36 DOPANT SPECIES USED IN CMOS IMPLANTS	73

Plasma Doping	73
Silicon-on-Insulator Technology	74
Hydrogen Implantation and Wafer Bonding	74
Oxygen Implantation (SIMOX)	75
Other Semiconductor Applications	75
EPITAXY APPLICATIONS FOR SEMICONDUCTORS	75
MOCVD for Silicon Wafers	76
MBE Applications	76
TABLE 37 COMPOUND SEMICONDUCTOR DEVICES MANUFACTURED BY MBE	76
Quantum Well Lasers	77
KEY MATERIALS USED IN SEMICONDUCTOR APPLICATIONS	78
CVD MATERIALS	78
TABLE 38 MAJOR MATERIALS DEPOSITED BY CVD IN THE FABRICATION OF SEMICONDUCTORS	78
Dielectrics	79
Conductors	79
ION IMPLANTATION MATERIALS	79
TABLE 39 KEY MATERIALS USED FOR ION IMPLANTATION IN SEMICONDUCTOR FABRICATION	80
MBE MATERIALS	80
TABLE 40 TYPICAL MATERIALS USED IN MBE OPERATIONS	81
SEMICONDUCTOR MARKET DRIVERS AND TRENDS	81
THIN FILM EQUIPMENT DEMAND	82
CMOS Business Model	82
Fluctuating Growth Trends	83
TABLE 41 GLOBAL GROWTH TREND FOR SEMICONDUCTORS AND THIN FILM EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE RATIO)	83
CVD	84
ION IMPLANTATION	84
MBE	85
OTHER MICROELECTRONIC APPLICATIONS	85
COMPONENTS	85
FLAT-PANEL DISPLAYS	86
LIGHT-EMITTING DIODES	86
TABLE 42 OVERVIEW OF OTHER MICROELECTRONIC APPLICATIONS FOR THIN FILM EQUIPMENT	86
Market Drivers for Other Microelectronic Products	87
FORECAST ASSUMPTIONS—CVD, ION IMPLANTATION, AND EPITAXY IN MICROELECTRONICS	88
TABLE 43 FORECAST ASSUMPTIONS: THIN FILM GROWTH IN THE MICROELECTRONICS INDUSTRY	88
TABLE 43 (CONTINUED)	89
TABLE 44 PROJECTED GLOBAL GROWTH TREND FOR CVD, ION IMPLANTATION, AND EPITAXY THIN FILM TECHNOLOGIES, THROUGH 2013 (VALUE AND PERCENTAGE RATIO)	89

FORECAST—VALUE OF CVD SHIPMENTS	90
TABLE 45 VALUE OF GLOBAL CVD EQUIPMENT SHIPMENTS FOR THE MICROELECTRONICS INDUSTRY, THROUGH 2013 (\$ MILLIONS)	90
FIGURE 3 GLOBAL CVD SHIPMENTS FOR MICROELECTRONICS (\$ MILLIONS)	91
FORECAST—VALUE OF IMPLANTATION EQUIPMENT SHIPMENTS	92
TABLE 46 FORECAST—VALUE OF GLOBAL IMPLANTATION EQUIPMENT FOR THE MICROELECTRONICS MARKET, THROUGH 2013 (\$ MILLIONS)	92
FIGURE 4 GLOBAL SHIPMENT VALUE OF ION IMPLANTATION EQUIPMENT FOR MICROELECTRONICS (\$ MILLIONS)	93
FORECAST—VALUE OF MBE EQUIPMENT SHIPMENTS	94
TABLE 47 FORECAST—GLOBAL VALUE OF MBE SHIPMENTS FOR MICROELECTRONIC APPLICATIONS, THROUGH 2013 (\$ MILLIONS)	94
FIGURE 5 GLOBAL VALUE OF MBE EQUIPMENT FOR MICROELECTRONICS, 2007-2013 (\$ MILLIONS)	94
FORECAST-VALUE OF DEPOSITED CVD MATERIALS	95
Measurement Considerations	96
TABLE 48 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD IN THE MICROELECTRONICS INDUSTRY, THROUGH 2013 (\$ MILLIONS)	96
FIGURE 6 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD, 2007-2013 (\$ MILLIONS)	97
FORECAST—VALUE OF ION IMPLANTATION MATERIALS	97
TABLE 49 GLOBAL VALUE OF MATERIALS USED FOR IMPLANTATION IN THE MICROELECTRONICS MARKET, THROUGH 2013 (\$ THOUSANDS)	98
FIGURE 7 GLOBAL VALUE OF MATERIALS IMPLANTED IN THE MICROELECTRONICS MARKET, 2007-2013 (\$ THOUSANDS)	99
FORECAST—VALUE OF MBE MATERIALS	99
TABLE 50 GLOBAL VALUE OF MATERIALS USED FOR MBE IN THE MICROELECTRONICS MARKET, THROUGH 2013 (\$ MILLIONS)	100
FIGURE 8 GLOBAL VALUE OF MATERIALS CONSUMED BY MBE BY THE MICROELECTRONICS INDUSTRY, 2007-2013 (\$ MILLIONS)	100
FORECAST—VALUE OF THIN FILM EQUIPMENT SERVICES	101
TABLE 51 VALUE OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY SERVICES IN THE MICROELECTRONICS INDUSTRY, THROUGH 2013 (\$ MILLIONS)	101
SUMMARY	102
TABLE 52 SUMMARY OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY SHIPMENTS, MATERIALS AND SERVICES FOR MICROELECTRONICS, THROUGH 2013 (\$ MILLIONS)	102
Summary (Continued)	103
CVD AND ION IMPLANTATION IN THE MEDICAL EQUIPMENT MARKET	104

CVD AND ION IMPLANTATION IN THE MEDICAL EQUIPMENT MARKET	
104	
MEDICAL PRODUCT DEFINITION	105
TABLE 53 BASIC TYPES OF MEDICAL DEVICES	105
INDUSTRY COMPETITIVENESS OF THIN FILM PROCESSES IN THE MEDICAL PRODUCT MARKET	106
GLOBAL ECONOMICS	106
TABLE 54 GLOBAL PRODUCTION OF MEDICAL EQUIPMENT AND SUPPLIES BY REGION, 2007–2013 (%)	106
TABLE 55 POSITIVE ECONOMIC FACTORS FOR THE MEDICAL DEVICE INDUSTRY	107
COST ISSUES	108
TECHNOLOGY	108
MEDICAL MARKET COMPETITIVENESS FACTORS	109
Driving Force for CVD and Ion Implantation	110
Impact of Market Growth Factors	110
TABLE 56 IMPACT OF MAJOR FACTORS ON THE GROWTH OF CVD AND ION IMPLANTATION IN THE MEDICAL INDUSTRY (%)	110
MEDICAL INDUSTRY APPLICATIONS	111
CVD PROCESS	111
TABLE 57 OVERVIEW OF CVD APPLICATIONS IN THE MEDICAL INDUSTRY	111
ION IMPLANTATION APPLICATIONS	112
TABLE 58 MAJOR MEDICAL APPLICATIONS OF ION IMPLANTATION IN THE MEDICAL INDUSTRY	112
TYPES OF CVD AND ION IMPLANTATION EQUIPMENT USED IN MEDICAL APPLICATIONS	113
MAJOR MATERIALS USED FOR MEDICAL APPPLICATIONS	113
CVD MATERIALS	113
TABLE 59 KEY MATERIALS DEPOSITED BY CVD FOR MEDICAL APPLICATIONS	114
ION IMPLANTATION MATERIALS	114
TABLE 60 KEY MATERIALS USE FOR ION IMPLANTATION AND IBAD IN THE MEDICAL MARKET	114
MEDICAL MARKET DRIVERS AND TRENDS	115
THIN FILM EQUIPMENT DEMAND	115
Fluctuating Growth Trends	116
TABLE 61 GLOBAL GROWTH TREND FOR MEDICAL EQUIPMENT AND THIN FILM EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE RATIOS)	116
CVD	117
ION IMPLANTATION	117
FORECAST ASSUMPTIONS—CVD AND ION IMPLANTATION IN THE MEDICAL INDUSTRY	117
TABLE 62 FORECAST ASUMPTIONS—THIN FILM GROWTH IN THE MEDICAL PRODUCTS INDUSTRY	118

TABLE 63 PROJECTED GLOBAL GROWTH TREND FOR CVD AND ION TECHNOLOGIES IN MEDICAL, THROUGH 2013 (VALUE AND PERCENTAGE RATIO)	119
FORECAST—VALUE OF MEDICAL CVD SHIPMENTS	119
TABLE 64 VALUE OF GLOBAL CVD SHIPMENTS FOR THE MEDICAL EQUIPMENT MARKET, THROUGH 2013 (\$ MILLIONS)	120
FIGURE 9 GLOBAL SHIPMENTS OF CVD EQUIPMENT FOR THE MEDICAL SUPPLY BUSINESS, 2007-2013 (\$ MILLIONS)	121
FORECAST—VALUE OF MEDICAL IMPLANT EQUIPMENT SHIPMENTS	121
TABLE 65 FORECAST—VALUE OF GLOBAL ION IMPLANTATION EQUIPMENT SHIPMENTS FOR THE MEDICAL SUPPLY BUSINESS, THROUGH 2013 (\$ MILLIONS)	122
FIGURE 10 GLOBAL VALUE OF ION IMPLANTATION EQUIPMENT SHIPPED FOR MEDICAL PRODUCTS, 2007-2013 (\$ MILLIONS)	122
FORECAST—VALUE OF CVD DEPOSITED MATERIALS	123
Measurement Considerations	123
TABLE 66 GLOBAL VALUE OF CVD-DEPOSITED MATERIALS IN THE MEDICAL SUPPLY INDUSTRY, THROUGH 2013 (\$ MILLIONS)	124
FIGURE 11 GLOBAL VALUE OF THIN FILM EQUIPMENT FOR THE MEDICAL SUPPLY BUSINESS, THROUGH 2013 (\$ MILLIONS)	124
FORECAST—VALUE OF IMPLANTATION MATERIALS	125
TABLE 67 GLOBAL VALUE OF MATERIALS USED FOR ION IMPLANTATION IN THE MEDICAL SUPPLY INDUSTRY (\$ THOUSANDS)	125
FIGURE 12 VALUE OF MATERIALS USED FOR ION IMPLANTATION APPLICATIONS, 2007-2013 (\$ THOUSANDS)	126
FORECAST—VALUE OF THIN FILM EQUIPMENT SERVICES	126
CVD Services	126
Ion Implantation Services	127
TABLE 68 VALUE OF GLOBAL CVD AND ION IMPLANTATION SERVICES IN THE MEDICAL MARKET, THROUGH 2013 (\$ MILLIONS)	127
CVD IN THE CUTTING TOOL MARKET	128
CVD IN THE CUTTING TOOL MARKET	128
PRODUCT DEFINITION	129
TABLE 69 BASIC TYPES OF CUTTING TOOLS	129
CUTTING TOOL INDUSTRY COMPETITIVENESS	130
ECONOMIC CONDITIONS	130
Economic Warnings	130
INTERNATIONAL CONDITIONS	131
Changing Market Shares	131
TABLE 70 GLOBAL CUTTING TOOL MARKET BY REGION, 2007-2013 (%)	131
TECHNOLOGY	132
CUTTING TOOL GROWTH FACTORS	132
Driving Force for CVD	133
Impact of Market Growth Factors	133

TABLE 71 IMPACT OF MAJOR FACTORS ON THE GROWTH OF CVD IN THE CUTTING TOOL INDUSTRY (%)	133
CUTTING TOOL APPLICATIONS	134
TABLE 72 MAJOR CVD CUTTING TOOL APPLICATIONS	134
TYPES OF CVD REACTORS	135
CVD versus PVD Process	136
ADVANTAGES OF CVD IN CUTTING TOOL COATING	136
MAJOR MATERIALS USED IN CUTTING TOOLS	137
TABLE 73 KEY MATERIALS DEPOSITED BY CVD IN THE CUTTING TOOL INDUSTRY	137
CUTTING TOOL MARKET DRIVERS AND TRENDS	138
CVD EQUIPMENT DEMAND	139
Fluctuating Growth Trends	139
TABLE 74 GLOBAL GROWTH TREND FOR THE CUTTING TOOL INDUSTRY AND CVD EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE RATIO)	139
FORECAST ASSUMPTIONS—CVD IN CUTTING TOOLS	140
TABLE 75 FORECAST ASSUMPTIONS FOR CVD GROWTH IN CUTTING TOOLS	141
TABLE 76 PROJECTED GLOBAL GROWTH TREND OF CVD FOR THE CUTTING TOOL INDUSTRY, THROUGH 2013	142
FORECAST—VALUE OF CVD CUTTING TOOL INDUSTRY SHIPMENTS	142
TABLE 77 FORECAST—VALUE OF CVD EQUIPMENT FOR THE CUTTING TOOL MARKET, THROUGH 2013 (\$ MILLIONS)	143
FIGURE 13 GLOBAL VALUE OF CVD EQUIPMENT FOR THE CUTTING TOOL INDUSTRY, 2007-2013 (\$ MILLIONS)	143
FORECAST—VALUE OF DEPOSITED CVD MATERIALS	144
Measurement Considerations	144
TABLE 78 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD IN THE CUTTING TOOL INDUSTRY, THROUGH 2013 (\$ MILLIONS)	145
FIGURE 14 GLOBAL VALUE OF MATERIALS FOR CVD IN THE CUTTING TOOL INDUSTRY (\$ MILLIONS)	145
FORECAST—VALUE OF CVD SERVICES	146
TABLE 79 GLOBAL VALUE OF CVD COATING SERVICES IN THE CUTTING TOOL INDUSTRY, THROUGH 2013 (\$ MILLIONS)	147
CVD AND ION IMPLANTATION IN THE INDUSTRIAL MARKET	148
CVD AND ION IMPLANTATION IN THE INDUSTRIAL MARKET	148
PRODUCT DEFINITION	149
TABLE 80 BASIC TYPES OF INDUSTRIAL PRODUCTS	149
INDUSTRIAL MARKET COMPETITIVENESS	150
AUTOMOTIVE MARKET	150
Domestic and International Economic Conditions	150
TABLE 81 CLOSING GAP BETWEEN U.S AND ASIAN AUTOMAKERS (% OF MARKET)	151
External Factors	151
TABLE 82 EXTERNAL FACTORS IMPACTING THE AUTO INDUSTRY	151

Technology	152	
AEROSPACE MARKET	152	
Economic Considerations	152	
TABLE 83 U.S. AEROSPACE SALES BY PRODUCT, 2001–2006		(\$
BILLIONS)	152	
International Market	153	
Technology	154	
MARKET GROWTH FACTORS FOR INDUSTRIAL CVD AND ION		
IMPLANTATION	154	
Driving Force for CVD	155	
Impact of Market Growth Factors	155	
TABLE 84 IMPACT OF MAJOR FACTORS ON CVD AND ION IMPLANTATION		
GROWTH IN THE INDUSTRIAL MARKET (%)	156	
INDUSTRIAL THIN FILM APPLICATIONS	156	
CVD PROCESS	156	
ION IMPLANTATION APPLICATIONS	157	
TABLE 85 MAJOR APPLICATIONS FOR CVD AND ION IMPLANTATION IN		
THE INDUSTRIAL MARKET	158	
TYPES OF CVD AND ION IMPLANTATION EQUIPMENT USED IN INDUSTRIAL		
APPLICATIONS	158	
MAJOR MATERIALS USED FOR INDUSTRIAL APPLICATIONS	159	
CVD MATERIALS	159	
TABLE 86 KEY MATERIALS DEPOSITED BY CVD FOR INDUSTRIAL		
APPLICATIONS	159	
ION IMPLANTATION MATERIALS	160	
TABLE 87 KEY MATERIALS USED FOR ION IMPLANTATION IN THE		
INDUSTRIAL MARKET	160	
INDUSTRIAL MARKET DRIVERS AND TRENDS	160	
THIN FILM EQUIPMENT DEMAND	161	
Fluctuating Growth Trends	162	
TABLE 88 GLOBAL GROWTH TREND FOR INDUSTRIAL PRODUCTS AND		
THIN FILM EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE		
RATIOS)	162	
CVD	162	
ION IMPLANTATION	163	
FORECAST ASSUMPTIONS—CVD AND ION IMPLANTATION IN THE		
INDUSTRIAL MARKET	163	
TABLE 89 FORECAST ASSUMPTIONS—THIN FILM GROWTH IN THE		
INDUSTRIAL MARKET	164	
TABLE 90 PROJECTED GLOBAL GROWTH TREND FOR CVD AND ION THIN		
FILM TECHNOLOGIES IN THE INDUSTRIAL SECTORS, THROUGH 2013		
(VALUE AND PERCENTAGE RATIO)	165	
FORECAST—VALUE OF INDUSTRIAL CVD EQUIPMENT SHIPMENTS	165	
TABLE 91 VALUE OF GLOBAL CVD SHIPMENTS FOR THE INDUSTRIAL		
MARKET, THROUGH 2013 (\$ MILLIONS)	166	

FIGURE 15 GLOBAL VALUE OF AUTOMOTIVE CVD SYSTEMS IN THE AUTOMOTIVE MARKET, 2007-2013 (\$ MILLIONS)	167
FIGURE 16 GLOBAL VALUE OF CVD SYSTEMS IN THE AEROSPACE MARKET, THROUGH 2013 (\$ MILLIONS)	167
FORECAST—VALUE OF INDUSTRIAL ION IMPLANTATION EQUIPMENT SHIPMENTS	168
TABLE 92 FORECAST—VALUE OF ION IMPLANTATION EQUIPMENT SHIPPED FOR THE INDUSTRIAL SEGMENT, THROUGH 2013 (\$ MILLIONS)	168
FIGURE 17 GLOBAL VALUE OF ION-RELATED EQUIPMENT IN THE AUTOMOTIVE AND AEROSPACE INDUSTRIES, 2007-2013 (\$ MILLIONS)	169
FORECAST—VALUE OF CVD DEPOSITED MATERIALS	169
Measurement Considerations	170
TABLE 93 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD IN THE INDUSTRIAL MARKETS, THROUGH 2013 (\$ MILLIONS)	170
FIGURE 18 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD FOR THE INDUSTRIAL MARKET, 2007-2013 (\$ MILLIONS)	171
FORECAST—VALUE OF ION IMPLANTATION MATERIALS	171
TABLE 94 GLOBAL VALUE OF MATERIALS USED FOR ION-RELATED INDUSTRIAL APPLICATIONS, THROUGH 2013 (\$ THOUSANDS)	172
FIGURE 19 GLOBAL VALUE OF MATERIALS USED FOR ION-RELATED INDUSTRIAL APPLICATIONS, 2007-2013 (\$ THOUSANDS)	173
FORECAST—VALUE OF THIN FILM EQUIPMENT SERVICES	173
CVD Services	173
Ion Services	174
TABLE 95 VALUE OF GLOBAL CVD AND ION IMPLANTATION SERVICES IN THE INDUSTRIAL MARKET, THROUGH 2013 (\$ MILLIONS)	174
Ion Services (Continued)	175
SUMMARY TABLE VALUE OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY MARKETS, THROUGH 2013 (\$ MILLIONS) XXVII	
TABLE 1 STATUS OF MAJOR DEPOSITION STUDIES BY BCC RESEARCH	2
TABLE 2 KEY THIN FILM TECHNOLOGIES INCLUDED	3
TABLE 3 KEY APPLICATIONS OF THIN FILM TECHNOLOGIES BY MARKET	4
TABLE 4 TYPICAL MATERIALS AND THEIR APPLICATIONS	5
TABLE 5 KEY COMPANIES IN THE CVD, ION IMPLANTATION, AND EPITAXY BUSINESS	7
TABLE 6 ESTMATED GLOBAL MANUFACTURING OF CVD, ION IMPLANTATION, AND EPITAXY EQUIPMENT (%)	10

TABLE 7 GLOBAL SHARE OF CVD, ION IMPLANTATION, AND EPITAXY CONSUMPTION, 2007-2013 (%)	12
TABLE 8 MARKET SHARES OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY MANUFACTURERS, 2007	14
TABLE 9 KEY TECHNICAL ADVANTAGES OF THE CVD PROCESS	27
TABLE 10 KEY TECHNICAL ADVANTAGES OF MOCVD	30
TABLE 11 MAJOR ADVANTAGES OF THE APCVD PROCESS	31
TABLE 12 KEY ADVANTAGES OF PLASMA-ENHANCED CVD	32
TABLE 13 MAJOR TECHNICAL ADVANTAGES OF HDP-CVD	33
TABLE 14 KEY TECHNICAL ADVANTAGES OF TEOS/OZONE CHEMISTRY	34
TABLE 15 TECHNICAL ADVANTAGES OF CLUSTER TOOLS	37
TABLE 16 KEY TECHNICAL ADVANTAGES OF ION IMPLANTATION	38
TABLE 17 KEY ADVANTAGES OF BEAMLINE IMPLANTATION	39
TABLE 18 KEY ADVANTAGES OF PIII	40
TABLE 19 KEY TECHNICAL ADVANTAGES OF IBAD/PIIID	42
TABLE 20 MAJOR TECHNICAL ADVANTAGES OF MBE	43
TABLE 21 DEVELOPMENTS THAT COULD EXPAND THE USE OF ION IMPLANTATION AND EPITAXY	44
TABLE 22 THIN FILM PRODUCT PATENTS BY TECHNICAL TOPIC, 2005–2007	45
TABLE 23 CVD, ION IMPLANTATION, AND EPITAXY-RELATED PATENTS BY REGION, 2005–2007	46
TABLE 24 ASSIGNEES WITH THREE OR MORE PATENTS	47
TABLE 25 BASIC PRODUCTS USING CVD, ION IMPLANTATION, AND EPITAXY PRODUCTS	56
TABLE 26 INTEGRATED CIRCUIT CHARACTERISTICS	57
TABLE 27 GLOBAL DEMAND FOR KEY MICROELECTRONIC PRODUCTS BY TYPE, THROUGH 2007 (\$ BILLIONS)	58
TABLE 28 KEY ADVANTAGES OF STANDARDS	60
TABLE 29 CHALLENGES FOR THE SIA	62
TABLE 30 ECONOMIC IMPACT ON CHIP INDUSTRY, 2008	64
TABLE 31 IMPACT OF MAJOR FACTORS ON THE GROWTH OF CVD, ION IMPLANTATION, AND EPITAXY IN THE MICROELECTRONICS INDUSTRY (%)	67
TABLE 32 BASIC/EMERGING CVD SEMICONDUCTOR APPLICATIONS	68
TABLE 33 CHANGING APPLICATIONS OF CVD FOR SEMICONDUCTORS	70
TABLE 34 ADVANTAGES OF CVD IN MAKING CARBON NANOTUBES	71
TABLE 35 SEMICONDUCTOR APPLICATIONS OF ION IMPLANTATION	72
TABLE 36 DOPANT SPECIES USED IN CMOS IMPLANTS	73
TABLE 37 COMPOUND SEMICONDUCTOR DEVICES MANUFACTURED BY MBE	76
TABLE 38 MAJOR MATERIALS DEPOSITED BY CVD IN THE FABRICATION OF SEMICONDUCTORS	78

TABLE 39	KEY MATERIALS USED FOR ION IMPLANTATION IN SEMICONDUCTOR FABRICATION	80
TABLE 40	TYPICAL MATERIALS USED IN MBE OPERATIONS	81
TABLE 41	GLOBAL GROWTH TREND FOR SEMICONDUCTORS AND THIN FILM EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE RATIO)	83
TABLE 42	OVERVIEW OF OTHER MICROELECTRONIC APPLICATIONS FOR THIN FILM EQUIPMENT	86
TABLE 43	FORECAST ASSUMPTIONS: THIN FILM GROWTH IN THE MICROELECTRONICS INDUSTRY	88
TABLE 44	PROJECTED GLOBAL GROWTH TREND FOR CVD, ION IMPLANTATION, AND EPITAXY THIN FILM TECHNOLOGIES, THROUGH 2013 (VALUE AND PERCENTAGE RATIO)	89
TABLE 45	VALUE OF GLOBAL CVD EQUIPMENT SHIPMENTS FOR THE MICROELECTRONICS INDUSTRY, THROUGH 2013	(\$ MILLIONS) 90
TABLE 46	FORECAST—VALUE OF GLOBAL IMPLANTATION EQUIPMENT FOR THE MICROELECTRONICS MARKET, THROUGH 2013 (\$ MILLIONS)	92
TABLE 47	FORECAST—GLOBAL VALUE OF MBE SHIPMENTS FOR MICROELECTRONIC APPLICATIONS, THROUGH 2013 (\$ MILLIONS)	94
TABLE 48	GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD IN THE MICROELECTRONICS INDUSTRY, THROUGH 2013	(\$ MILLIONS) 96
TABLE 49	GLOBAL VALUE OF MATERIALS USED FOR IMPLANTATION IN THE MICROELECTRONICS MARKET, THROUGH 2013 (\$ THOUSANDS)	98
TABLE 50	GLOBAL VALUE OF MATERIALS USED FOR MBE IN THE MICROELECTRONICS MARKET, THROUGH 2013 (\$ MILLIONS)	100
TABLE 51	VALUE OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY SERVICES IN THE MICROELECTRONICS INDUSTRY, THROUGH 2013 (\$ MILLIONS)	101
TABLE 52	SUMMARY OF GLOBAL CVD, ION IMPLANTATION, AND EPITAXY SHIPMENTS, MATERIALS AND SERVICES FOR MICROELECTRONICS, THROUGH 2013 (\$ MILLIONS)	102
TABLE 53	BASIC TYPES OF MEDICAL DEVICES	105
TABLE 54	GLOBAL PRODUCTION OF MEDICAL EQUIPMENT AND SUPPLIES BY REGION, 2007–2013 (%)	106
TABLE 55	POSITIVE ECONOMIC FACTORS FOR THE MEDICAL DEVICE INDUSTRY	107
TABLE 56	IMPACT OF MAJOR FACTORS ON THE GROWTH OF CVD AND ION IMPLANTATION IN THE MEDICAL INDUSTRY (%)	110
TABLE 57	OVERVIEW OF CVD APPLICATIONS IN THE MEDICAL INDUSTRY	111
TABLE 58	MAJOR MEDICAL APPLICATIONS OF ION IMPLANTATION IN THE MEDICAL INDUSTRY	112
TABLE 59	KEY MATERIALS DEPOSITED BY CVD FOR MEDICAL APPLICATIONS	114

TABLE 60	KEY MATERIALS USE FOR ION IMPLANTATION AND IBAD IN THE MEDICAL MARKET	114
TABLE 61	GLOBAL GROWTH TREND FOR MEDICAL EQUIPMENT AND THIN FILM EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE RATIOS)	116
TABLE 62	FORECAST ASUMPTIONS—THIN FILM GROWTH IN THE MEDICAL PRODUCTS INDUSTRY	118
TABLE 63	PROJECTED GLOBAL GROWTH TREND FOR CVD AND ION TECHNOLOGIES IN MEDICAL, THROUGH 2013 (VALUE AND PERCENTAGE RATIO)	119
TABLE 64	VALUE OF GLOBAL CVD SHIPMENTS FOR THE MEDICAL EQUIPMENT MARKET, THROUGH 2013 (\$ MILLIONS)	120
TABLE 65	FORECAST—VALUE OF GLOBAL ION IMPLANTATION EQUIPMENT SHIPMENTS FOR THE MEDICAL SUPPLY BUSINESS, THROUGH 2013 (\$ MILLONS)	122
TABLE 66	GLOBAL VALUE OF CVD-DEPOSITED MATERIALS IN THE MEDICAL SUPPLY INDUSTRY, THROUGH 2013 (\$ MILLIONS)	124
TABLE 67	GLOBAL VALUE OF MATERIALS USED FOR ION IMPLANTATION IN THE MEDICAL SUPPLY INDUSTRY	(\$ THOUSANDS) 125
TABLE 68	VALUE OF GLOBAL CVD AND ION IMPLANTATION SERVICES IN THE MEDICAL MARKET, THROUGH 2013	(\$ MILLIONS) 127
TABLE 69	BASIC TYPES OF CUTTING TOOLS	129
TABLE 70	GLOBAL CUTTING TOOL MARKET BY REGION, 2007-2013 (%)	131
TABLE 71	IMPACT OF MAJOR FACTORS ON THE GROWTH OF CVD IN THE CUTTING TOOL INDUSTRY (%)	133
TABLE 72	MAJOR CVD CUTTING TOOL APPLICATIONS	134
TABLE 73	KEY MATERIALS DEPOSITED BY CVD IN THE CUTTING TOOL INDUSTRY	137
TABLE 74	GLOBAL GROWTH TREND FOR THE CUTTING TOOL INDUSTRY AND CVD EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE RATIO)	139
TABLE 75	FORECAST ASSUMPTIONS FOR CVD GROWTH IN CUTTING TOOLS	141
TABLE 76	PROJECTED GLOBAL GROWTH TREND OF CVD FOR THE CUTTING TOOL INDUSTRY, THROUGH 2013	142
TABLE 77	FORECAST—VALUE OF CVD EQUIPMENT FOR THE CUTTING TOOL MARKET, THROUGH 2013 (\$ MILLIONS)	143
TABLE 78	GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD IN THE CUTTING TOOL INDUSTRY, THROUGH 2013 (\$ MILLIONS)	145
TABLE 79	GLOBAL VALUE OF CVD COATING SERVICES IN THE CUTTING TOOL INDUSTRY, THROUGH 2013 (\$ MILLIONS)	147
TABLE 80	BASIC TYPES OF INDUSTRIAL PRODUCTS	149
TABLE 81	CLOSING GAP BETWEEN U.S AND ASIAN AUTOMAKERS (% OF MARKET)	151
TABLE 82	EXTERNAL FACTORS IMPACTING THE AUTO INDUSTRY	151

TABLE 83 U.S. AEROSPACE SALES BY PRODUCT, 2001–2006	(\$ BILLIONS)	152
TABLE 84 IMPACT OF MAJOR FACTORS ON CVD AND ION IMPLANTATION GROWTH IN THE INDUSTRIAL MARKET (%)		156
TABLE 85 MAJOR APPLICATIONS FOR CVD AND ION IMPLANTATION IN THE INDUSTRIAL MARKET		158
TABLE 86 KEY MATERIALS DEPOSITED BY CVD FOR INDUSTRIAL APPLICATIONS		159
TABLE 87 KEY MATERIALS USED FOR ION IMPLANTATION IN THE INDUSTRIAL MARKET		160
TABLE 88 GLOBAL GROWTH TREND FOR INDUSTRIAL PRODUCTS AND THIN FILM EQUIPMENT, THROUGH 2007 (VALUE AND PERCENTAGE RATIOS)		162
TABLE 89 FORECAST ASSUMPTIONS—THIN FILM GROWTH IN THE INDUSTRIAL MARKET		164
TABLE 90 PROJECTED GLOBAL GROWTH TREND FOR CVD AND ION THIN FILM TECHNOLOGIES IN THE INDUSTRIAL SECTORS, THROUGH 2013 (VALUE AND PERCENTAGE RATIO)		165
TABLE 91 VALUE OF GLOBAL CVD SHIPMENTS FOR THE INDUSTRIAL MARKET, THROUGH 2013 (\$ MILLIONS)		166
TABLE 92 FORECAST—VALUE OF ION IMPLANTATION EQUIPMENT SHIPPED FOR THE INDUSTRIAL SEGMENT, THROUGH 2013	(\$ MILLIONS)	168
TABLE 93 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD IN THE INDUSTRIAL MARKETS, THROUGH 2013 (\$ MILLIONS)		170
TABLE 94 GLOBAL VALUE OF MATERIALS USED FOR ION-RELATED INDUSTRIAL APPLICATIONS, THROUGH 2013 (\$ THOUSANDS)		172
TABLE 95 VALUE OF GLOBAL CVD AND ION IMPLANTATION SERVICES IN THE INDUSTRIAL MARKET, THROUGH 2013	(\$ MILLIONS)	174
SUMMARY FIGURE GLOBAL VALUE OF THE CVD, ION IMPLANTATION, AND EPITAXY MARKETS, THROUGH 2013	(\$ MILLIONS)	XXVII
FIGURE 1 ESTIMATED GLOBAL CVD, ION IMPLANTATION, AND EPITAXY MANUFACTURING, 2007-2013 (%)		11
FIGURE 2 GLOBAL SHARE OF CVD, ION IMPLANTATION, AND EPITAXY CONSUMPTION, 2007-2013 (%)		13
FIGURE 3 GLOBAL CVD SHIPMENTS FOR MICROELECTRONICS	(\$ MILLIONS)	91
FIGURE 4 GLOBAL SHIPMENT VALUE OF ION IMPLANTATION EQUIPMENT FOR MICROELECTRONICS (\$ MILLIONS)		93
FIGURE 5 GLOBAL VALUE OF MBE EQUIPMENT FOR MICROELECTRONICS, 2007-2013 (\$ MILLIONS)		94
FIGURE 6 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD, 2007-2013 (\$ MILLIONS)		97

FIGURE 7 GLOBAL VALUE OF MATERIALS IMPLANTED IN THE MICROELECTRONICS MARKET, 2007-2013 (\$ THOUSANDS)	99
FIGURE 8 GLOBAL VALUE OF MATERIALS CONSUMED BY MBE BY THE MICROELECTRONICS INDUSTRY, 2007-2013 (\$ MILLIONS)	100
FIGURE 9 GLOBAL SHIPMENTS OF CVD EQUIPMENT FOR THE MEDICAL SUPPLY BUSINESS, 2007-2013 (\$ MILLIONS)	121
FIGURE 10 GLOBAL VALUE OF ION IMPLANTATION EQUIPMENT SHIPPED FOR MEDICAL PRODUCTS, 2007-2013 (\$ MILLIONS)	122
FIGURE 11 GLOBAL VALUE OF THIN FILM EQUIPMENT FOR THE MEDICAL SUPPLY BUSINESS, THROUGH 2013 (\$ MILLIONS)	124
FIGURE 12 VALUE OF MATERIALS USED FOR ION IMPLANTATION APPLICATIONS, 2007-2013 (\$ THOUSANDS)	126
FIGURE 13 GLOBAL VALUE OF CVD EQUIPMENT FOR THE CUTTING TOOL INDUSTRY, 2007-2013 (\$ MILLIONS)	143
FIGURE 14 GLOBAL VALUE OF MATERIALS FOR CVD IN THE CUTTING TOOL INDUSTRY (\$ MILLIONS)	145
FIGURE 15 GLOBAL VALUE OF AUTOMOTIVE CVD SYSTEMS IN THE AUTOMOTIVE MARKET, 2007-2013 (\$ MILLIONS)	167
FIGURE 16 GLOBAL VALUE OF CVD SYSTEMS IN THE AEROSPACE MARKET, THROUGH 2013 (\$ MILLIONS)	167
FIGURE 17 GLOBAL VALUE OF ION-RELATED EQUIPMENT IN THE AUTOMOTIVE AND AEROSPACE INDUSTRIES, 2007-2013 (\$ MILLIONS)	169
FIGURE 18 GLOBAL VALUE OF MATERIALS DEPOSITED BY CVD FOR THE INDUSTRIAL MARKET, 2007-2013 (\$ MILLIONS)	171
FIGURE 19 GLOBAL VALUE OF MATERIALS USED FOR ION-RELATED INDUSTRIAL APPLICATIONS, 2007-2013 (\$ THOUSANDS)	173