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## Semico raises IC forecast, sees shortages

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AUSTIN, Texas -- Propelled by the early signs of a recovery, Semico Research Corp. has raised its IC forecast for 2010.

During a presentation at the ISMI Symposium here, Jim Feldhan, president of Semico, also said that the IC industry is seeing shortages of select products, namely DDR SDRAMs, LCD drivers and standard logic.

In its most recent forecast, Semico predicted that the IC market would fall 12 percent in 2009, but the sector would grow by 18 percent in 2010.

Now, the research firm predicts that the IC market will fall 12.5 percent in 2009. Feldhan said that the IC market will grow by 20 percent in 2010, due in part to better average selling prices (ASPs) and a stronger memory market.

It's been a roller-coaster ride in 2009. The IC market fell 15.9 percent in the first quarter, but it saw a 20 percent jump in the second quarter. Much of this growth was attributed to "replacement inventories," he said. Of the 20 percent figure, some "8-to-9 percent was fundamental demand."

In the third quarter, the IC market is expected to see 11 percent growth. To meet his minus 12.5 percent forecast, the IC market must grow by 5 percent in Q4.

Still, the real question is clear: Has the IC market fully recovered from the downturn? "I still think we're in the early growth phase," he added.

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