Contributing for miniaturization and yield enhancement in semiconductor manufacturing processes

HORIBA’s mass flow controllers, which are devices that control gas and liquid flows in the semiconductor, solar cell, and LED (light-emitted diode) manufacturing process, have a leading global market share. Products from HORIBA include many other types of monitoring equipment for semiconductor manufacturers. HORIBA aims to contribute to the semiconductor industry by providing customers with high-level solutions that support technical advances in processing, miniaturization, and yield enhancement.

2014 results and 2015 forecasts

Paying particular attention to the demand outlook for the second half of 2015 despite the semiconductor industry’s solid capital expenditures

In 2014, due to continued growth in demand for semiconductors from 2013 as well as several new successful product launches, sales of mass flow controllers increased to 52% of global market share. Sales of chemical concentration monitors, which are used in semiconductor wafer cleaning processes, also increased mainly in Asia due to an increase in demand from semiconductor manufacturers. As a result, sales and profit increased significantly year-on-year.

In 2015, we expect high levels of demand to persist for the first six months, but moving toward the second half of 2015, we need to pay attention to the investment outlook of semiconductor manufacturers, particularly in South Korea and Taiwan. Additionally, we are focusing on the demand outlook for production equipment manufacturers for solar cells and LEDs.

Expansion of sales in Asia, supported by strong trust from global semiconductor manufacturers

One of the HORIBA’s strength is its capability to support customers in Asia. Our strategy is to expand our market share in Asia by earning more credibility not only from semiconductor manufacturers, but also from manufacturers of solar cells, LEDs, and semiconductor devices and by providing enhanced quality products that satisfy anticipated customer demand.

At the Aso plant (Kumamoto Prefecture, Japan), our major plant for manufacturing mass flow controllers, we broadened production capacity to satisfy needs of the Medical-Diagnostic Instruments & Systems segment. This allows us to effectively utilize resources by shifting personnel between the two business segments even when we face a drop in production for semiconductor system equipment. Flexible plant management according to fluctuations in production demand is one of HORIBA’s strengths.

Horiba’s global market share for mass flow controllers

HORIBA has maintained more than 40% of the global mass flow controller market share since 2009. It is noteworthy that our share expanded in the period from a downturn phase, which started in 2009 and lasted until a recovery in 2010, by successfully meeting our customers’ needs through new product introductions and expanded production capacity. In our view, this is attributed to the success of our balanced management, which minimized the reduction in manufacturing investment and production capacity during a significant downturn in the market.