

Keeping informed

The end of the first quarter of the New Year is drawing near. With the better weather should come a warmer feeling as to the state of the industry. Certainly, there is much of a positive note to report. So I welcomed a chance to return to the Editor's seat for a while. Mark has left 'to pursue other interests' and we wish him well.

The timing is interesting. It is nearly a decade since I relinquished the role and nearly two since the magazine was first published. Not surprisingly, a lot has happened since. I am pleased to note, however, that while some names have gone, some are still prominent in the magazine. Their support over the years is much appreciated. Most importantly, the need for III-Vs seems to be stronger than ever.

The field is constantly expanding so it is ever more difficult trying to keep on top of things. One such observer, Strategy Analytics keeps close tabs on key sectors such as mobile comms. Lately it has been warning of the impact of RF MEMS in the cellphone business. Apparently, CMOS silicon-on-sapphire (SoS) RF switches are the threat with SoS beginning to disrupt established approaches to transmit-receive switching in multi-mode multi-band cellular handsets - notably GaAs p-HEMT switches. Other key design-ins are also under threat so no doubt we will be returning to the topic in a future issue.

Another key area for advanced semiconductors like III-Vs is in the wireless LAN market. This has enjoyed phenomenal growth with more on the way - from 140 m

annual chipset unit shipments last year to 430 m in 2009, says In-Stat.

In their recent financials MMIC makers like TriQuint Semiconductor were enjoying mixed success. While the overall trend is encouraging, some operators are being adversely affected by the costs associated with the ramping up of new device products. Conversely, it was a different trend which was affecting opto component players. Amid all the legal disputes, top HB blue LED maker Nichia said it had been suffering from steep erosion of ASPs in the merchant market for LEDs which are themselves linked to handset sales. So too plans for widespread consumer take up of products based on violet laser is seeing schedule slippage. Recent consumer electronics shows saw some encouragement but sadly also some major setbacks like Sony's postponement of the PlayStation 3 launch. Blu-ray may make it to the Xmas list but it's looking grimmer.

Meanwhile, manufacturing continues its exodus to China. JDSU is to sell its manufacturing operations in Canada to Fabrinet marking the final phase of its plan to transition all optical assembly manufacturing to Asia and conforms to the general trend in that part of the industry. Also, Bookham has made progress moving its assembly and test operations to China.

Interesting times which demand our close attention.

Roy Szeda, Acting Editor

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