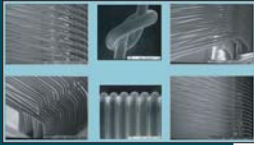


Advanced Packaging Update: Market and Technology Trends

Q1, 2005



The first quarterly Advanced Packaging Update (formerly the BGA/CSP update) for 2005 features special coverage of the laminate substrate shortage caused by the ASE fire. Capacity has been calculated based on a survey of major worldwide suppliers for laminate flip chip substrates, wire bond PBGA substrates, and laminate CSP substrates. The capacity is compared to projected demand for 2005 and 2006 for each substrate type. Trends in microprocessor packaging are also covered, including the packaging for the new Cell processor planned for Sony's PlayStation. The growth in advanced packaging, defined as BGAs, CSPs, and wafer level packages, is projected in unit volumes through 2009. A special section on the expansion of IC package assembly and test in China highlights trends in the region. New package developments in coated wire are presented.

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