

## Apple iPhone a trigger for NAND flash growth, says Semico



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Semico Research Corporation has said that NAND flash saw a growth rate of 217 percent in 2006, making it the fastest growing product in semiconductor history! Regrettably, revenues only went up 9 percent in 2006, as ASPs fell considerably. Semico projects 2007 NAND revenues to be up only 2 percent compared with last year while unit shipments will increase by 82 percent.

Though these figures are off from the pace set last year, Semico believes that the NAND flash gigabytes will grow at a CAGR of 102 percent through 2011.

"NAND market pricing is like a rubber ball: what goes up must come down, and then back up again," said Adrienne Downey, Senior Analyst, Non-Volatile Memory at Semico Research Corporation. "Revenue growth was spectacular for several years, but as more manufacturers enter the market, prices fall to profit-erasing levels. Shortages tend to appear when a significant new application hits the market and consumes all the available NAND in sight."

According to Semico, Apple has already placed significant orders for 4GB and 8GB NAND flash with memory manufacturers as it is predicting that it will sell millions of its first mobile phone when available in North America in June of this year.

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