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## DRAM revenue to increase more than 70%, Semico reports

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Electronic News

On the heels of 33% and 40% sequential revenue DRAM increases in Q3 2009 and Q4 2009 respectively, market researchers at **Semico** forecast DRAM revenue will increase by more than 70% this year, compared to 2009.

The company noted that since the industry reached its bottom in December 2008, DRAM ASPs have increased by 108%. From that point on, the DRAM industry began recovering, and from October 2009 to January 2010 DRAM ASPs increased another 18%.

With indications in the industry showing no signs of ASP deterioration, this will contribute to robust DRAM revenues this year.

Further, DRAM shortages are on the horizon and closing in fast, Semico reminded.



The results of slowed manufacturing capacity output and a lack of capital expenditure over the last 24 months, alongside increased underlying demand driven by a hot PC market has led to a positive DRAM pricing environment.

As a result, DRAM demand will continue to outpace supply this year, leading to a shortage scenario, Semico concluded.

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