

Semico's New Findings in NVM Market Share

Phoenix, AZ - May 24, 2005 - NAND was the fastest-growing of any semiconductor market in 2004 according to a newly-published report by Semico Research Corp.

<http://www.storagesearch.com/flash.html>

Revenues jumped a whopping 80% to \$7.2 billion. Even so, NAND continued to trail NOR, which ended 2004 at \$9.1 billion. These two flash technologies lead the nonvolatile memory storage market, combining to account for 91% of all nonvolatile memory revenues. ROM, EPROM, and EEPROM revenues each accounted for less than \$1 billion in revenues. Samsung led the pack in total nonvolatile as well as in NAND, owing to its dominant 54% share of NAND revenues. This company was able to take \$2 billion of the \$3.2 billion growth in 2004's NAND market. Spansion displaced Intel for leadership in NOR, despite Spansion's eroding share toward the end of the year. The top spots in ROM, EPROM, and EEPROM were taken by Macronix, Oki, and Atmel, respectively.

"It is just astounding how NAND technology continues to grow, even in a year where it suffered a price collapse," said Jim Handy, Director of Semico Research's Nonvolatile Memory Service. "Although there were only eight NAND suppliers in 2004, their dedication to satisfy the incredible hunger of the consumer markets for this new technology supported this astounding level of growth."

The size of the NAND market came as something of a surprise since WSTS reported lower revenues for the same year of only \$6.5 billion. This caused Semico to redouble its efforts, verifying findings with market participants to ascertain the accuracy of the survey's findings. In the end, the solid and rigorous methodology behind the report proved irrefutable, and the larger number was confirmed.

This study is available for immediate delivery for \$3,500.

To purchase, please contact Julie Patch at +1 602-997-0337 or juliep@semico.com, and reference NV103-05. ...Semico Research profile, Market research, Flash Memory