

NAND Growth Outpaced Other Semis in 2004, Semico Finds

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NAND was the fastest-growing of any semiconductor market in 2004 as revenues jumped 80 percent to \$7.2 billion, according Semico Research Corp.

Even so, NAND continued to trail NOR, which ended 2004 at \$9.1 billion. These two flash technologies lead the nonvolatile market, accounting for 91 percent of all nonvolatile memory revenues. Revenues for other nonvolatile memories -- ROM, EPROM, and EEPROM -- each accounted for less than \$1 billion.

Samsung led the pack in total nonvolatile as well as in NAND, owing to its dominant 54 percent share of NAND revenues. The company was able to take \$2 billion of the \$3.2 billion growth in 2004's NAND market, the firm noted.

Spansion displaced Intel for leadership in the NOR segment, 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," noted Jim Handy, director of Semico's nonvolatile memory research, in a statement.

"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," he added.

The size of the NAND market came as something of a surprise to Phoenix, Ariz.-based Semico since the WSTS reported lower revenues for the same year of only \$6.5 billion, prompting the firm to redouble its efforts, verify findings with market participants to ascertain the accuracy of its findings. In the end, Semico said it confirmed its results.

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