

NOR Market: Cell Phones Still Rule

3Q07 Pricing and Forecast

October 2007

Study Number: NV107-07

Semico Research provides memory reports that cover all aspects of the memory market. Semico in conjunction with Semiconductor Partners provide data on the overall memory market. This is a series of reports including analysis and data from Semiconductor Partners and Semico Research Corp. provided exclusively for Semico Research.

© Copyright Semico Research and Semiconductor Partners, 2007. All rights reserved.

Reproduction in whole or part is prohibited without the express written permission of Semico Research and Semiconductor Partners.

The contents of this report represent the interpretation and analysis of statistics and information that is generally available to the public or released by responsible agencies or individuals, but is not guaranteed as to its accuracy or completeness.

Table of Contents

List of Tables	ii
List of Figures	iii
Executive Overview	1
Forecast Methodology	2
NOR Market Overview	3
General Trends	3
Market Update	3
Capacity Update	4
Forecast Discussion and Assumptions	5
Applications Forecast.....	9
Quarterly Revenues	12
Annual Revenues.....	13
Unit Shipments.....	14
Average Selling Prices.....	15
Gigabyte Shipments.....	16
Average Density.....	17
Price per Megabyte.....	18
NOR Price Survey Results	20
512Kb	20
1Mb.....	22
2Mb.....	23
4Mb.....	24
8Mb.....	25
16Mb.....	26
32Mb.....	27
64Mb.....	28
128Mb.....	29
Appendix.....	31

List of Tables

Table 1. NOR Pricing 512Kb — 128Mb	20
Table 2. Worldwide NOR Revenue Forecast.....	31
Table 3. Worldwide NOR Unit Shipment Forecast.....	32
Table 4. Worldwide NOR ASP Forecast	33
Table 5. Worldwide NOR Megabyte Shipment Forecast	34
Table 6. Worldwide NOR Quarterly Revenue Forecast.....	34
Table 7. Worldwide NOR Quarterly Unit Shipment Forecast.....	35
Table 8. Worldwide NOR Quarterly ASP Forecast	35
Table 9. Worldwide NOR Quarterly Megabyte Shipment Forecast	36

List of Figures

Figure 1. Quarterly NOR Revenue and Units	6
Figure 2. Annual NOR Revenues and ASP	7
Figure 3. NOR Density Migration	8
Figure 4. Annual NOR Megabytes and Units	9
Figure 5. NOR Applications Forecast.....	10
Figure 6. Applications Focus: Cell Phones	11
Figure 7. Quarterly NAND and NOR Revenues.....	13
Figure 8. NAND and NOR Worldwide Revenues.....	14
Figure 9. NAND and NOR Worldwide Unit Shipments	15
Figure 10. NAND and NOR Overall Average Selling Price.....	16
Figure 11. NAND and NOR Megabyte Shipments.....	17
Figure 12. NAND and NOR Average Density	18
Figure 13. NAND and NOR Average Price per Megabyte	19
Figure 14. NOR 512Kb Pricing.....	22
Figure 15. NOR 1Mb Pricing	23
Figure 16. NOR 2Mb Pricing	24
Figure 17. NOR 4Mb Pricing	25
Figure 18. NOR 8Mb Pricing	26
Figure 19. NOR 16Mb Pricing	27
Figure 20. NOR 32Mb Pricing	28
Figure 21. NOR 64Mb Pricing	29
Figure 22. NOR 128Mb Pricing	30