



European Semiconductor Industry Association

## ***Latest Semiconductor sales data, for immediate release***

**Brussels, December 2nd 2008**

### **European sales of semiconductors down 1.7% in October**

Sales on the European semiconductor market declined in October by 1.7% compared to the previous month, the World Semiconductor Trade Statistics (WSTS) reported last week. This negative evolution is in line with the contraction patterns registered worldwide. Prospects for global economic growth have deteriorated and concerns remain about the potential impact of the financial crisis also on the semiconductor industry.

Overall, all product categories contributed to the European semiconductor market downturn in October. The only exception was the MOS Micro category with MPU growing by 5% compared to the previous month. The logic market showed a below-average decline of -1%, whereas on the other side the memory market declined by 8% compared to the previous month.

More in detail, European semiconductor sales in October 2008 amounted to US\$ 3.420 billion according to WSTS, down 1.7% versus the previous month. This corresponds to a decline of 5.3% compared to the same month last year. On a YTD basis semiconductor sales declined by 0.6% versus the same period in the year 2007.

The exchange rate of the Euro compared to the US dollar experienced a spectacular dive reversing its recent impact on the growth data as predicted. Measured in Euro, semiconductor sales in October 2008 were 2.400 billion Euro, up 3.3% on previous month and down 7.7% versus the same month a year ago. On a YTD basis semiconductor sales showed still a decline of 10.5% versus the same period in the year 2007.

On a worldwide basis, semiconductor sales in October 2008 were US\$ 22.471 billion, down 2.1% versus the previous month. This results in a decline of 2.4% versus the same month in 2007 and on a YTD basis it results in an increase of 2.5%.

(for more data please see the tables and graphs on following pages)

**EECA-ESIA and WSTS:** ESIA, the European Semiconductor Industry Association holds an exclusive license agreement with the WSTS for the region of Europe, Middle East and Africa (EMEA). WSTS monthly data in full product detail is available via subscription.

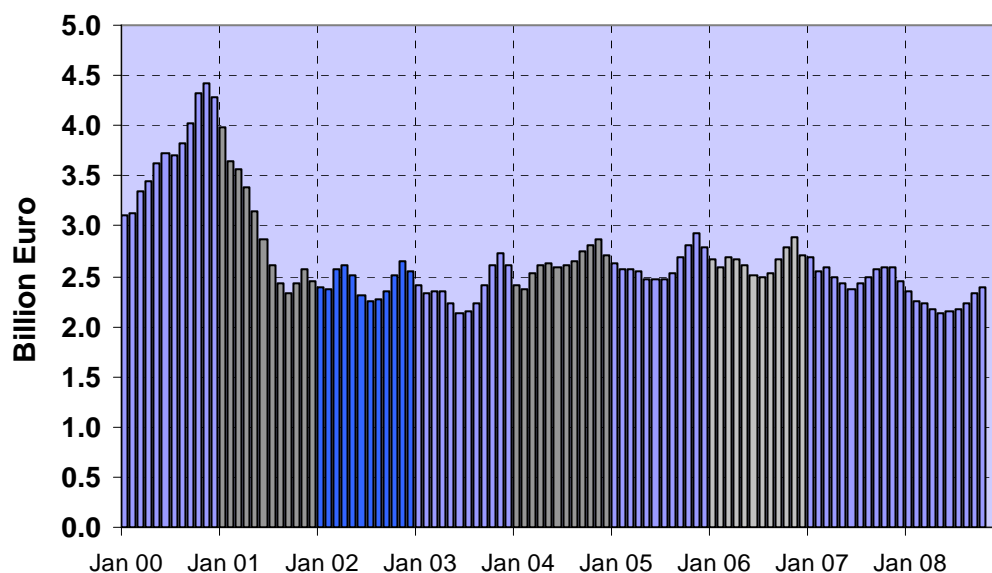
## Market data by region<sup>1</sup>

Market data for the 3 month moving average ending:								
Region	sales (in billions)		Month on Month growth		Year on Year growth		YTD growth	
	Sep 08	Oct 08	Sep 08	Oct 08	Sep 08	Oct 08	Sep 08	Oct 08
in \$:								
Europe	3.478	3.420	0.9%	-1.7%	-1.5%	-5.3%	0.8%	-0.6%
Americas	3.207	3.206	-3.4%	0.0%	-15.7%	-16.9%	-5.0%	-6.8%
Japan	4.258	4.236	0.9%	-0.5%	0.0%	-3.0%	3.8%	3.0%
Asia Pacific	12.021	11.609	2.5%	-3.4%	9.2%	3.7%	8.3%	6.7%
of which China	4.367	4.273		-2.2%				
World	22.964	22.471	1.1%	-2.1%	1.6%	-2.4%	4.0%	2.5%
In EURO:								
Europe	2.323	2.400	4.1%	3.3%	-9.5%	-7.7%	-10.8%	-10.5%
Rate (\$/Euro)	1.436	1.334	3.7%	-6.0%	< Euro against \$ versus prev. Year			

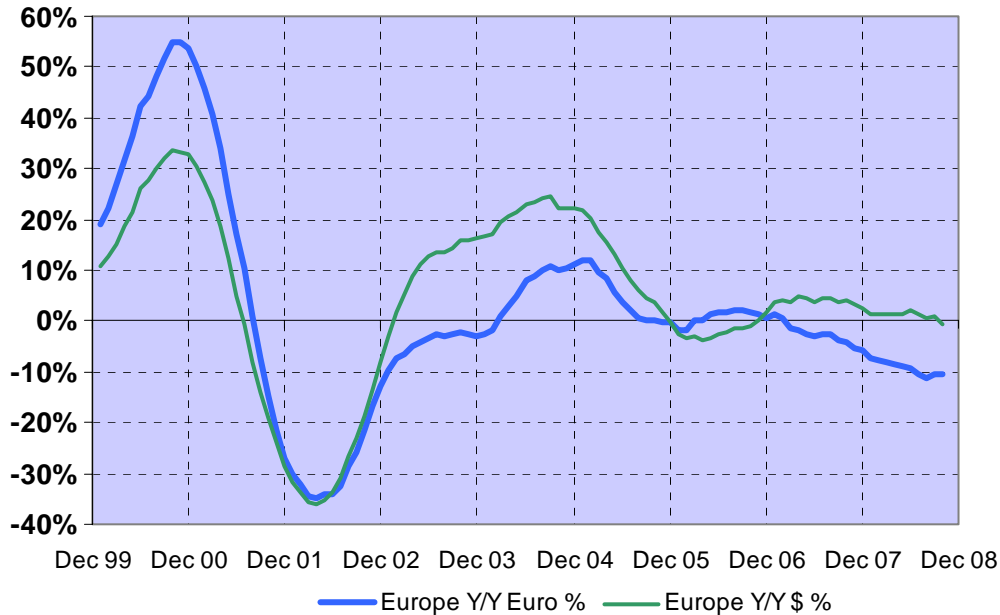
1) Unless otherwise indicated, except YTD growth, all figures are 3-month-average data

## EUROPE - Monthly European Semiconductor sales in billion Euro

(3-month-average data)



## European Semiconductor sales growth in % - Annualized growth trend (Y/Y) in Euro and Dollar (12-month-average data)



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**About ESIA: The European Semiconductor Industry Association (ESIA)**, part of the European Electronic Component manufacturers' Association (EECA), represents the European-based manufacturers of semiconductor devices. EECA-ESIA is a chartered member of the World Semiconductor Council. More information on the ESIA website [www.eeca.eu](http://www.eeca.eu)

**About WSTS:** Established in 1986, WSTS is an organization of 73 semiconductor companies from all over the world representing close to 90% of the world's semiconductor market. Its mission is to provide timely, accurate and authentic semiconductor market data on industry product shipments in a product line form serving the broad marketing and executive needs, therefore documenting past - and anticipating future business trends. More information on the WSTS website at [www.wsts.org](http://www.wsts.org)