

## ***FOR IMMEDIATE RELEASE***

Brussels, December 31, 2003

### **Upturn goes on -**

### **European Semiconductor Market in November 2003**

The November WSTS data continue the positive trend since mid 2003 heading for a good growth in 2004. The demand for semiconductors was strong in most product areas, except Microprocessors showing some weakness. Driving electronic applications fueling the growth were especially automotive and wireless communications.

This ongoing trend provides a solid base and confidence for the upturn of the semiconductor industry and for the market forecast of 2004.

Please note: Since September 2003 the data contain now micromechanical actuators in addition to sensors. This new product category has entered a significant volume already and adds an additional 1,2% year to date growth in comparison with last year.

European Semiconductor sales in November 2003 amounted to US\$ 3.160 billion according to WSTS, up +6.4% versus previous month. This corresponds to a +21.2% increase compared to the same month last year. Year-to-date, semiconductor sales increased by +16.4% versus the same period last year.

The exchange rate of the Euro compared to the US\$ has a very significant and still increasing impact on the growth data at this time. Measured in Euro, semiconductor sales in November were EURO 2.7417 billion, an increase of +4.7% versus previous month and an increase of +3.8% versus the same month a year ago. On a year-to-date basis, semiconductor sales decreased by -2.7% versus the same period last year.

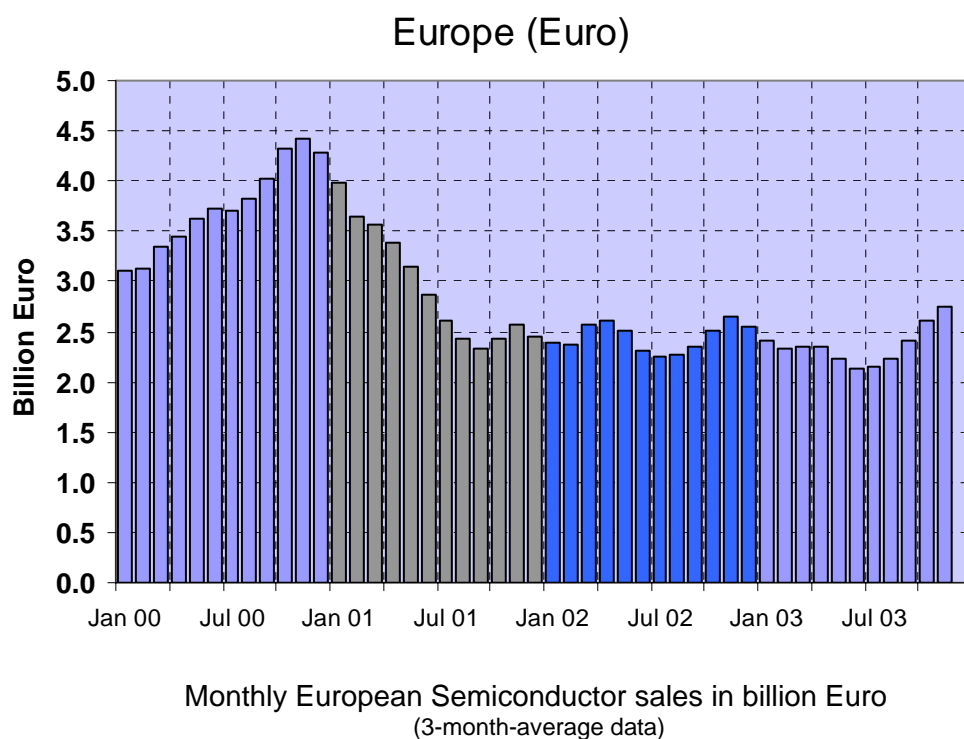
On a Worldwide basis, semiconductor sales in November were US\$ 16.128 billion, up +4.5% versus previous month. This results to an increase of +25.7% versus the same month in 2002 and on a year-to-date basis to a growth of +17.4%.

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

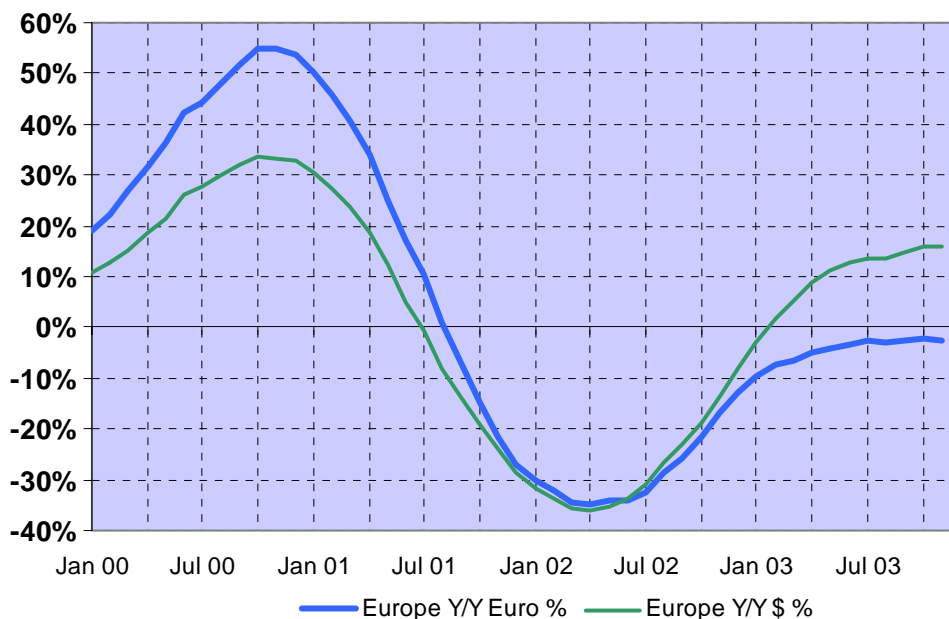
Data Table:

Market data for the 3 month moving average ending:								
Region	sales (in billions)		Month on Month growth		Year on Year growth		YTD growth	
	Okt 03	Nov 03	Okt 03	Nov 03	Okt 03	Nov 03	Okt 03	Nov 03
in \$:								
<b>Europe</b>	2.971	3.160	9.3%	6.4%	20.8%	21.2%	16.1%	16.4%
<b>Americas</b>	2.937	3.056	6.7%	4.1%	11.0%	13.5%	0.8%	2.2%
<b>Japan</b>	3.560	3.721	5.9%	4.5%	24.8%	30.7%	26.0%	26.8%
<b>Asia Pacific</b>	5.967	6.191	6.2%	3.8%	31.0%	32.3%	20.4%	21.6%
<b>World</b>	<b>15.434</b>	<b>16.128</b>	<b>6.8%</b>	<b>4.5%</b>	<b>23.3%</b>	<b>25.7%</b>	<b>16.4%</b>	<b>17.4%</b>
In EURO:								
<b>Europe</b>	2.617	2.741	8.2%	4.7%	4.4%	3.8%	-3.1%	-2.7%
Rate (\$/Euro)	1.169	1.173	19.2%	17.3%	< Euro against \$ versus prev. Year			

(Unless otherwise indicated, all figures are 3-month-average data.)



## Trend Growth in Dollar versus Growth in Euro



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

WSTS monthly data in full product detail are available via subscription. For more information please contact the EECA-ESIA office under [secretariat@eeeca.be](mailto:secretariat@eeeca.be)

### About EECA and ESIA

The European Electronic Component Manufacturers Association (EECA) is an association grouping of four autonomous industry associations with members coming from the manufacturing and related industries as well as from national associations. Their goal is to promote and defend the vital interests of the European Electronic Components Industry and to support its competitive position in the global marketplace. The four associations are European Semiconductor Industry Association (ESIA), European Display Industry Association (EDIA), European Passive Components Industry Association (EPCIA), European Packaging and Interconnection Industry Association (EPIA). EECA is a chartered member of the World Semiconductor Council. More information can be found at <http://www.eeca.org>.

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