



European Semiconductor Industry Association

Latest Semiconductor sales data, for immediate release

Brussels, September 30, 2004

European Semiconductor market continues to perform well in August

The growth of the European market for semiconductors decelerated slightly in August, in line with the overall market trend developing around the world. European market growth is at similar levels as those of the Americas and Japanese markets, but continues to be outpaced by the Asia Pacific region. Specifically, semiconductors for wireless communications and computer continued to show good performance in August. All in all, 2004 is promising to be a year of solid growth.

European Semiconductor sales in August 2004 amounted to US\$ 3.215 billion according to the World Semiconductor Trade Statistics (WSTS), up +1.6% versus the previous month. This corresponds to a +26.4% increase compared to the same month last year. On a year-to-date basis, semiconductor sales increased by +26.6% versus the same period in 2003.

The exchange rate of the Euro compared to the US\$ has still a significant impact on the growth data at this time. Measured in Euro, semiconductor sales in July were EURO 2.608 billion, an increase of +0.8% versus previous month and an increase of +21.5% versus the same month a year ago. On a year-to-date basis, semiconductor sales increased by +14.4% versus the same period in 2003.

On a worldwide basis, semiconductor sales in August were US\$ 18.205 billion, up +1.1% versus the previous month. This results in an increase of +34.2% versus the same month in 2003 and on a year-to-date basis results in a growth rate of +35.0%.

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

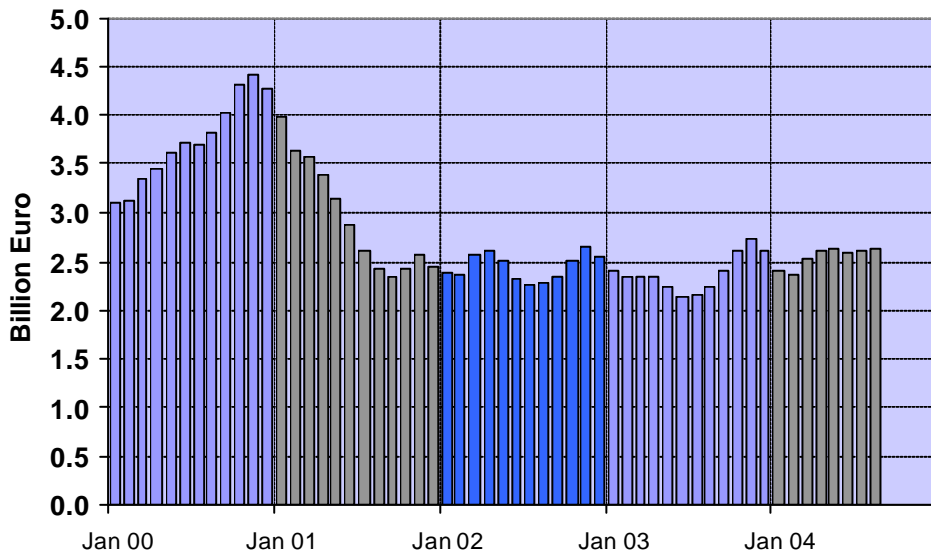
About ESIA: The European Semiconductor Industry Association (ESIA), part of the European Electronic Component manufacturers' Association (EECA), represents the European-based manufacturers of semiconductor devices. The semiconductor industry provides the enabling technology, which is at the forefront of the development of the digital economy. The sector supports over 86,000 jobs in a market currently valued at around €28.5 bn.

Market data by region¹

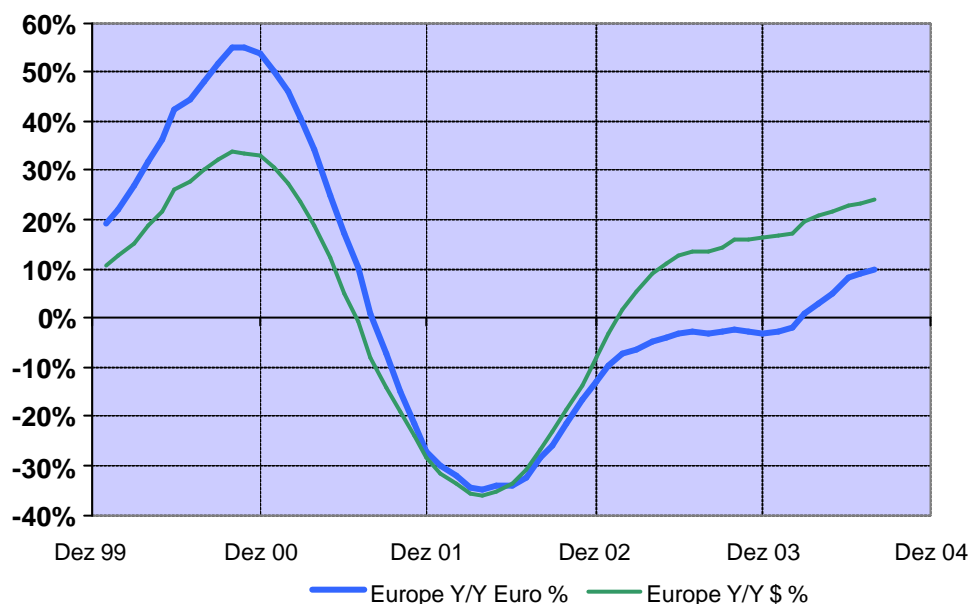
| Market data for the 3 month moving average ending: | | | | | | | | |
|--|---------------------|---------------|-----------------------|-------------|-------------------------------------|--------------|--------------|--------------|
| Region | sales (in billions) | | Month on Month growth | | Year on Year growth | | YTD growth | |
| | Jul 04 | Aug 04 | Jul 04 | Aug 04 | Jul 04 | Aug 04 | Jul 04 | Aug 04 |
| in \$: | | | | | | | | |
| Europe | 3.163 | 3.215 | 1.3% | 1.6% | 27.6% | 26.4% | 26.5% | 26.6% |
| Americas | 3.295 | 3.367 | 0.2% | 2.2% | 29.0% | 29.0% | 27.6% | 26.8% |
| Japan | 3.913 | 3.972 | 2.1% | 1.5% | 23.6% | 23.7% | 25.6% | 24.9% |
| Asia Pacific | 7.644 | 7.651 | 0.7% | 0.1% | 57.5% | 47.2% | 52.7% | 50.2% |
| World | 18.015 | 18.205 | 1.0% | 1.1% | 38.0% | 34.2% | 36.1% | 35.0% |
| In EURO: | | | | | | | | |
| Europe | 2.608 | 2.638 | 0.8% | 1.2% | 21.5% | 18.3% | 14.4% | 14.6% |
| Rate (\$/Euro) | 1.223 | 1.220 | 7.5% | 9.6% | < 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



**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 is available via subscription. For more information please contact the EECA-ESIA office under secretariat.gen@eeca.be or visit our website at <http://www.eeca.org/esia.htm>.

EECA-ESIA is a chartered member of the World Semiconductor Council (<http://www.semiconductorcouncil.org/>) and licensee of WSTS data for Europe, Middle East and Africa.

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