



European Semiconductor Industry Association

Latest Semiconductor sales data, for immediate release

Brussels, January 30, 2005

December sales data confirms 2004 as record year!

The European market in 2004 was valued at an all-time record 39.4bn \$, according to December figures released by WSTS. This means that the European market grew by +22% in 2004, compared with 2003 (32.3bn \$). Compared to the 3rd quarter of 2004, it was up 5.3% sequentially in Q4, whereas the other regions showed a sequential decline. As a consequence, the worldwide semiconductor market in the 4th quarter decreased by 0.8% compared to the 3rd quarter of 2004. Despite this, the worldwide semiconductor market grew by 28% in 2004 compared to 2003.

For Europe, automotive remains a main driver, while the segments Communications, Optoelectronics, DRAM and MPU gained ground over the year. Looking at Q4, DRAM (Europe +12,4%), Optoelectronics (Europe +6,61%) and Flash memories are all good performers.

European Semiconductor sales in December 2004 amounted to US\$ 3.525 billion according to the World Semiconductor Trade Statistics (WSTS), down -2.1% versus the previous month. This corresponds to a +13.5% increase compared to the same month last year. On a total year basis, semiconductor sales increased by +22.0% versus total year 2003.

The exchange rate of the Euro compared to the US\$ has still an increased significant impact on the growth data at this time. Measured in Euro, semiconductor sales in December were 2.718 billion Euro, a decrease of -5.4% versus previous month and an increase of +4.2% versus the same month a year ago. On a total year basis, semiconductor sales increased by +11.2% versus total year 2003.

On a worldwide basis, semiconductor sales in December were US\$ 18.368 billion, down -3.5% versus the previous month. This results in an increase of +14.6% versus the same month in 2003 and on a total year basis results in a growth rate of +28.0%.

(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.

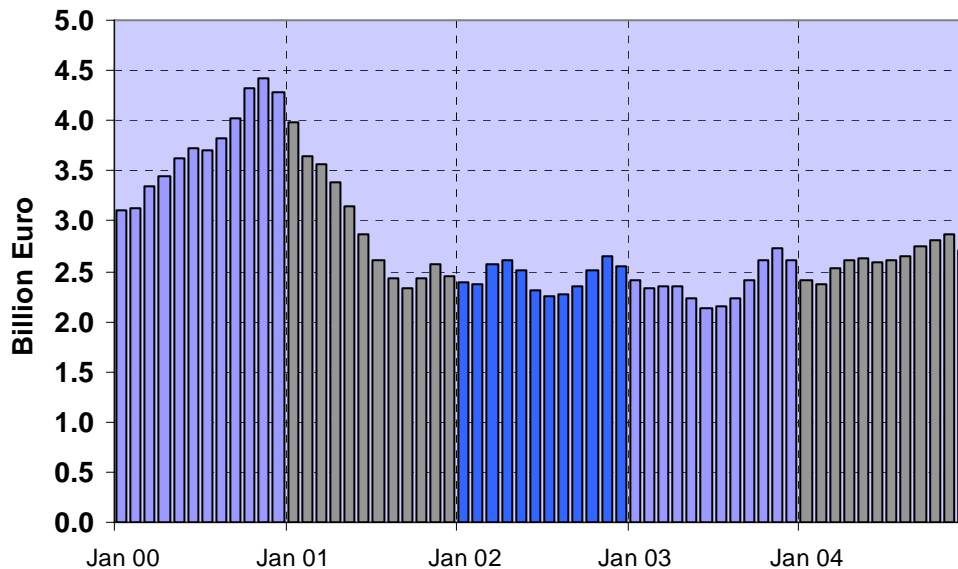
About WSTS: Established in 1986, the World Semiconductor Trade Statistics is a non-profit corporation whose mission is to provide timely, accurate and authentic semiconductor market data on industry product shipments in a product line format serving the broad marketing and executive needs. In 2004 WSTS members are 72 semiconductor companies from all over the world representing around 85% of the world's semiconductor market.

Market data by region¹

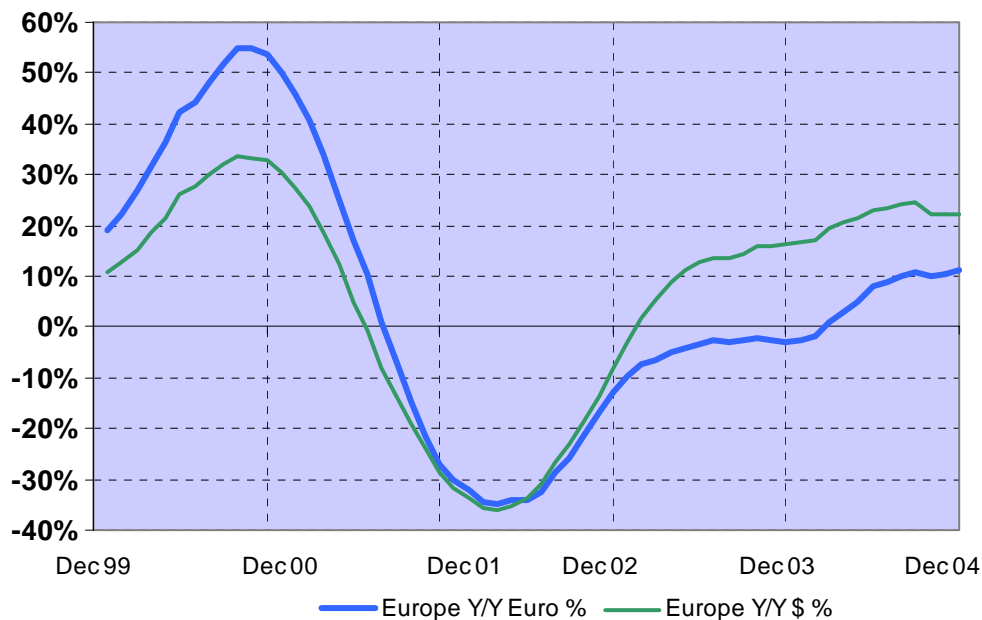
Market data for the 3 month moving average ending:								
Region	sales (in billions)		Month on Month growth		Year on Year growth		YTD growth	
	Nov 04	Dec 04	Nov 04	Dec 04	Nov 04	Dec 04	Nov 04	Dec 04
in \$:								
Europe	3.603	3.525	4.2%	-2.1%	14.5%	13.5%	22.7%	22.0%
Americas	3.450	3.237	-1.6%	-6.2%	12.9%	6.7%	23.0%	20.8%
Japan	3.944	3.857	1.0%	-2.2%	6.0%	3.8%	18.9%	17.5%
Asia Pacific	8.038	7.748	1.6%	-3.6%	29.8%	25.4%	43.5%	41.3%
World	19.035	18.368	1.3%	-3.5%	18.1%	14.6%	29.7%	28.0%
In EURO:								
Europe	2.873	2.718	2.1%	-5.4%	5.2%	4.2%	11.7%	11.2%
Rate (\$/Euro)	1.299	1.339	10.7%	9.0%	< 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)



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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