



European Semiconductor Industry Association

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

Brussels, January 1st 2009

### **European sales of semiconductors decrease in November**

Sales on the European semiconductor market declined in November by 7.4 % compared with the previous month, the World Semiconductor Trade Statistics (WSTS) reports today. This downturn is in line with the decrease in sales registered worldwide.

While most product categories showed a negative evolution, a few categories registered a positive growth in November. In particular, in the application specific analog category sales of computer & peripheral increased by 11.5%; consumer MOS special purpose logic grew by 11.6%; in the MOS memory category, total MOS SRAM were up 11 %. Finally, a flat development was registered in the optoelectronic category, up by 1% in November.

More in detail, European semiconductor sales in November 2008 amounted to US\$ 3.170 billion according to WSTS, down 7.4% versus the previous month. This corresponds to a decline of 13.9% compared to the same month last year. On a YTD basis semiconductor sales declined by 3.3% versus the same period in the year 2007.

The exchange rate of the Euro compared to the US dollar continued a spectacular decline still in November, keeping its impact on the growth data. Measured in Euro, semiconductor sales in November 2008 were 2.335 billion Euro, down 2.7% on previous month and down 9.9% versus the same month a year ago. On a YTD basis semiconductor sales showed a decline of 11.1% versus the same period in the year 2007.

On a worldwide basis, semiconductor sales in November 2008 were US\$ 20.844 billion, down 7.2% versus the previous month. This results in a decline of 9.9% versus the same month in 2007 and on a YTD basis it results in an increase of 0.2%. This development makes a positive forecast for the whole year 2008 more and more unlikely.

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

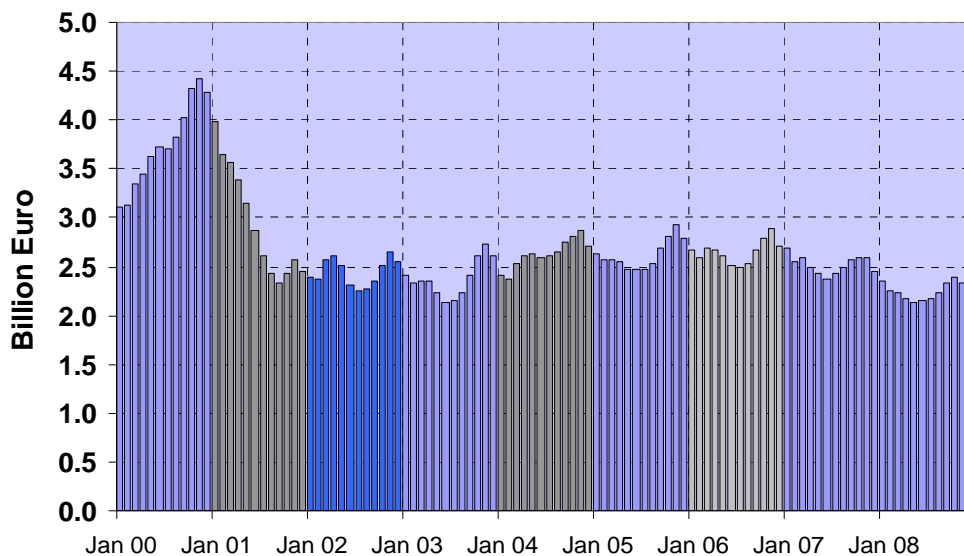
**EECA-ESIA and WSTS:** ESIA, the European Semiconductor Industry Association holds an exclusive license agreement with the WSTS for the region of Europe, Middle East and Africa (EMEA). WSTS monthly data in full product detail is available via subscription.

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

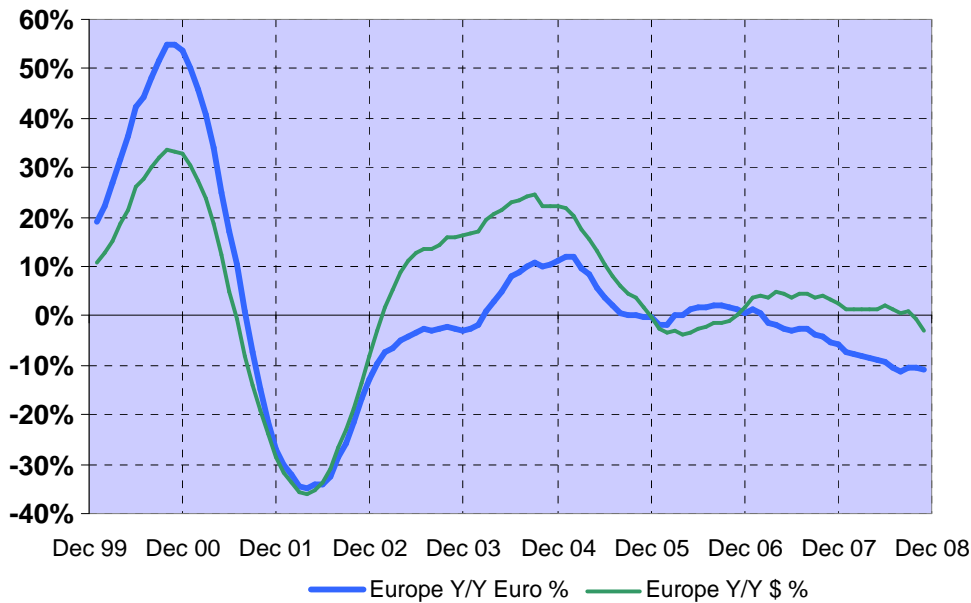
| Market data for the 3 month moving average ending: |                     |               |                       |              |                                     |              |             |             |
|--|---------------------|---------------|-----------------------|--------------|-------------------------------------|--------------|-------------|-------------|
| Region   | sales (in billions) |               | Month on Month growth |              | Year on Year growth                 |              | YTD growth  |             |
|  | Oct 08              | Nov 08        | Oct 08                | Nov 08       | Oct 08                              | Nov 08       | Oct 08      | Nov 08      |
| <b>in \$:</b>                                      |                     |               |                       |              |                                     |              |             |             |
| <b>Europe</b>                                      | 3.420               | 3.170         | -1.7%                 | -7.3%        | -5.3%                               | -13.9%       | -0.6%       | -3.3%       |
| <b>Americas</b>                                    | 3.207               | 3.080         | 0.0%                  | -4.0%        | -16.9%                              | -19.5%       | -6.8%       | -8.4%       |
| <b>Japan</b>                                       | 4.236               | 4.065         | -0.5%                 | -4.0%        | -3.0%                               | -7.3%        | 3.0%        | 1.4%        |
| <b>Asia Pacific</b>                                | 11.604              | 10.529        | -3.4%                 | -9.3%        | 3.7%                                | -6.2%        | 6.7%        | 3.8%        |
| of which China                                     | 4.273               | 3.869         |                       | -9.4%        |                                     |              |             |             |
| <b>World</b>                                       | <b>22.467</b>       | <b>20.844</b> | <b>-2.1%</b>          | <b>-7.2%</b> | <b>-2.4%</b>                        | <b>-9.9%</b> | <b>2.5%</b> | <b>0.2%</b> |
| <b>In EURO:</b>                                    |                     |               |                       |              |                                     |              |             |             |
| <b>Europe</b>                                      | 2.400               | 2.335         | 3.3%                  | -2.7%        | -7.7%                               | -9.9%        | -10.5%      | -11.1%      |
| Rate (\$/Euro)                                     | 1.334               | 1.270         | -6.0%                 | -13.4%       | < 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)

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