



European Semiconductor Industry Association

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

**Brussels, August 31<sup>st</sup>, 2009**

### **European sales of semiconductor grew 5.3% in July**

European sales for semiconductors grew on a three month rolling average basis by 5.3 % in July compared with the previous month, the World Semiconductor Trade Statistics (WSTS) reported on August 30<sup>th</sup>. This is the third month of consecutive growth in Europe. This positive performance is in line with the developments observed in the other regions in July, with in particular Japan growing by 7.9 % and leading, for this month, the market rebound.

In Europe, sales for optoelectronics (up 17%) and for sensors (up 13%) grew well above the worldwide average. Sales for analog devices were also positive, growing by 4.2%. On the memory market, positive figures were reported for DRAM (up 16%) and Flash memories (in particular NAND, up 4.2%). In the MOS micro category, good performances were reported for the MOS microprocessor and MOS microcontroller categories, up 7.2% and 6% respectively.

Looking at application specific chips, analog devices used in automotive showed remarkably good dynamics, growing on a three month rolling average basis by 7.1% in July.

Overall, European semiconductor sales in July 2009 amounted to US\$ 2.317 billion. This corresponds to a decline of 31.7% compared to the same month last year. On a YTD basis semiconductor sales declined by 33.1% in 2009 versus the same period in the year 2008.

The exchange rate imbalance of the Euro compared to the US dollar increases again its impact on the European sales picture. Measured in Euro, semiconductor sales of 1.665 billion Euros in July 2009 rebounded slightly, up 3.1% on the previous month and down 23.3% versus the same month a year ago. On a YTD basis semiconductor sales declined by 23.6% in 2009 versus the same period in the year 2008.

On a worldwide basis, semiconductor sales in July 2009 were US\$ 18.153 billion, up 5.3% versus the previous month, which is a positive growth for the fifth month in a row now. This results in a decline of 18.2% versus the same month in 2008 and on a YTD basis it results in a decline of 22.6%. Thus Europe is still hit worse than other regions.

(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 are available via subscription.

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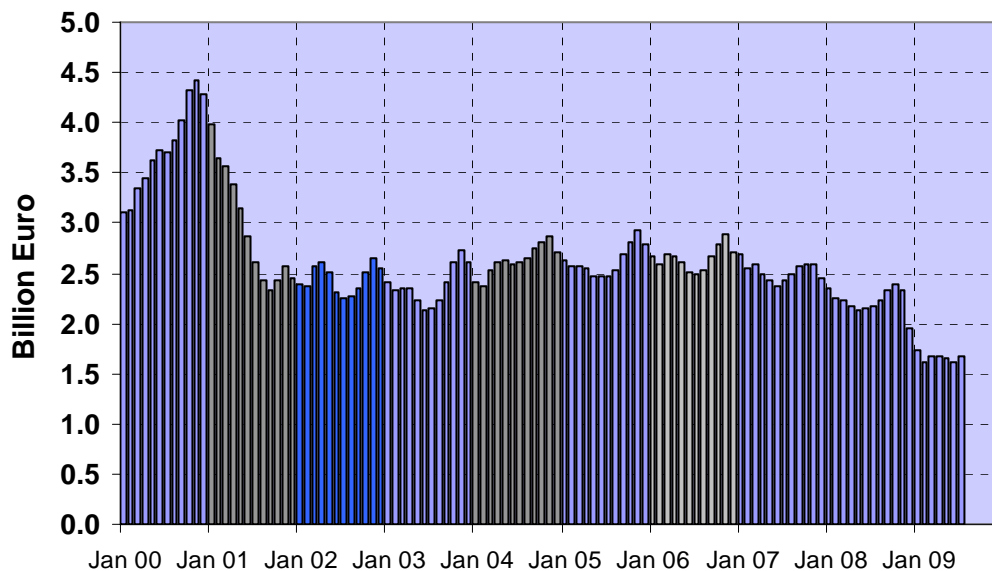
## Market data by region<sup>1</sup>

Market data for the 3 month moving average ending:								
Region	sales (in billions)		Month on Month growth		Year on Year growth		YTD growth	
	Jun 09	Jul 09	Jun 09	Jul 09	Jun 09	Jul 09	Jun 09	Jul 09
<b>in \$:</b>								
<b>Europe</b>	2.201	2.317	0.7%	5.3%	-34.7%	-31.7%	-34.65%	-33.10%
Americas	2.909	3.080	4.8%	5.9%	-14.5%	-8.0%	-18.0%	-14.9%
Japan	2.983	3.219	8.2%	7.9%	-24.5%	-21.6%	-32.5%	-30.4%
Asia Pacific	9.142	9.538	2.8%	4.3%	-15.7%	-15.9%	-20.7%	-18.6%
of which China	3.417	3.572	2.7%	4.5%	-13.9%	-12.4%	-18.2%	-16.4%
<b>World</b>	<b>17.236</b>	<b>18.153</b>	<b>3.7%</b>	<b>5.3%</b>	<b>-20.1%</b>	<b>-18.2%</b>	<b>-24.8%</b>	<b>-22.6%</b>
<b>In EURO:</b>								
<b>Europe</b>	1.615	1.665	-2.0%	3.1%	-25.1%	-23.3%	-25.1%	-23.6%
Rate (\$/Euro)	1.401	1.407	-9.9%	-11.0%	< Euro against \$ versus prev. Year			

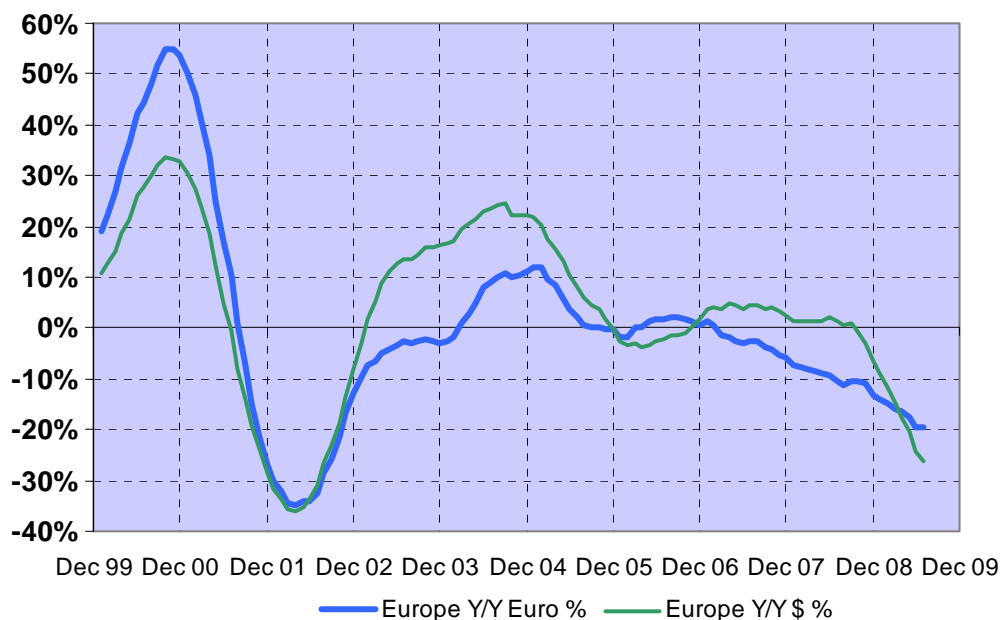
1) Unless otherwise indicated, all figures are 3-month-average data except YTD growth which is based on current month data.

Please note that WSTS data for March, April and May 2009 have been revised.

## 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 manufacturer's Association (EECA), represents the European-based manufactures of semiconductor devices. The semiconductor industry provides the key enabling technologies at the forefront of the development of the digital economy. This sector supports around 115,000 jobs directly and up to 500,000 induced jobs in Europe, in a market valued at around EUR 26bn in 2008. 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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