

2007 Non Volatile Memory Market Shares by Vendor

Report Number

CS700MS-28

Key Findings

2007 total Non-Volatile memory market grew 11.5% to \$28.197 billion, up from \$25.283 billion in 2006. Flash memory represented the largest segment reaching over \$26.34 billion in 2007 with NAND more than doubling the NOR shipments. Serial NOR shipments also increased as much of the momentum to convert consumer designs shifted away from parallel NOR to serial. NAND Flash had many pricing undulations throughout the year with Samsung again leading the market in revenue volume. Toshiba and SanDisk grew the most in year-over-year revenue increases from their MLC NAND components.

Other NVM markets mirrored the NOR Flash market with serial and parallel EEPROM markets dropping only slightly. NVRAM followed suit with E2, and the new OTP ROM market grew a little. Prices also dropped similar to NOR Flash and unit shipments grew quite well trying to offset some of the price declines.

Analysis and Reporting Methodology

The 2007 Non-Volatile Memory Market Shares by Vendor report lists the revenue and market shares for each manufacturer/vendor by product for 2006 and 2007. In addition, vendor rankings for each market are listed for 2005, 2006, and 2007. Vendor market shares are provided for the consolidated Non-Volatile memory market, as well as for total Flash memory components, NOR Flash, NAND Flash, Serial NOR Flash, total EEPROM, Serial EEPROM, Parallel EEPROM, NVRAM, and the combined EPROM and MROM or OTP ROM markets.

Two distinct research methods have been employed for this report. Each manufacturer was surveyed for revenue shipments of standalone non-volatile memory components. In the event a supplier was unable to provide product shipment revenue for 2007, Web-Feet Research estimated their respective revenue. The total reported market size for each Non-Volatile memory market was reconciled with the Semiconductor Industry Association/World Semiconductor Trade Statistics (SIA/WSTS) bluebook totals for the OPT ROM, EEPROM and NVRAM markets. For the Flash market, Web-Feet Research compared the annual totals reported to the FMRA (Flash Memory Reporting Association) from the top eighteen Flash manufacturers.

Revenue forecasts are provided from 2006 to 2012 for the non-Flash markets: serial and parallel EEPROM, NVRAM, and OTP ROM.

Table of Contents

Table of Contents	iv
List of Figures	v
List of Tables	vi
1 Executive Summary	1
2 Objectives and Methodology	3
3 Total Non-Volatile Memory Market Shares	5
4 Flash Memory Components	7

4.1 Flash Vendor Market Performance	8
--	----------

5 EEPROM Memory – Serial and Parallel

5.1.1 Serial EEPROM Market	15
----------------------------	----

5.1.2 Parallel EEPROM Market	17
------------------------------	----

6 Non-Volatile RAM

7 OTP ROM

8 Appendix A: Biography

About Web-Feet Research

Web-Feet Research, located in Monterey, California, provides market research, analysis, and consulting services for the electronics and semiconductor industries; focusing on the non-volatile memory and storage markets with an emphasis on Flash memory, SSDs and small form factor hard drives.

The company has significant expertise and experience in the areas of communications, computers and consumer electronics applications, as well as in identification, definition, design and marketing of standard and application specific semiconductor components. In addition to the syndicated market analysis reports, our analysts and consultants have worked on a series of commissioned reports and projects for customers in the electronics and semiconductor industries: customer-specific and multi-client reports, advanced applications of existing technology reports, emerging technology economics studies, potential uses of emerging technology studies, management consulting projects.

The company draws on a vast technology and systems expertise in communications, computing, consumer and automotive, including experience in the relevant areas of the semiconductor industry: micrologic, analog/mixed signal, memories, micro power management, displays and sensors, as well as semiconductor manufacturing technologies and processes. Web-Feet Research collaborators have extensive market knowledge and marketing experience in the United States, Europe and in the Asia-Pacific region.

Web-Feet Research reports take into consideration major social, political, economic and technology changes underway and the impact these changes have on the economy, the high technology industries in general, and the electronics and semiconductor industries in particular.

The growing complexity and scope of economic developments creates a need to put the qualitative and quantitative aspects of the development trends in a broader perspective and to correlate them with the macroeconomic factors. Therefore, Web-Feet Research reports embrace and correlate both the technology and commercial aspects of the developments.