

From the Spring 2009 Forecast Meeting, held in Berlin, Germany
19 May to 22 May 2009

WSTS projects -21.6 percent global semiconductor decline in 2009

Worldwide Semiconductor Market to Decline -21.6 percent in 2009, Increase +7.3 percent in 2010 and +8.9 percent in 2011

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The global semiconductor market is expected to decline -21.6 percent on an annualized basis to \$194.8 billion in 2009, according to the spring 2009 forecast of the World Semiconductor Trade Statistics (WSTS). Due to the real economical crisis the worldwide semiconductor market will further decrease from -2.8 percent decline in 2008. The current projections have been revised downwards by -20 percentage points compared to the forecast that WSTS issued in November last year. We expect to reach the bottom of the current cycle during the first half of 2009 and therefore see now a positive growth beginning in the first quarter 2010. This leads to a growth rate for the semiconductor market of 7.3 percent to \$209B in 2010 followed by a stronger increase of 8.9 percent in 2011 to \$228B.

"The WSTS foresees a continued growth in demand for electronic products such as PCs, digital consumer appliances, mobile communications, and last but not least automotive electronics, enhanced by increase of semiconductor content per installed system." said Dr. Ulrich Schaefer, Worldwide Chairman of WSTS. He continued, "These trends are expected to unfold despite one of the strongest economical crisis in more than 80 years. Although we expect a significant reduction of sales this year, in the long run this trend is not influenced."

The current forecast anticipates a positive growth from 2010 and on, peaking in 2011. In the long run the Asia Pacific region continues to be the fastest growing geographical area, due to the dynamics of both the strong rise in domestic demand and the continued manufacturing shift to this region.

Forecast Summary

Spring 2009	Amounts in US\$M				Year on Year Growth in %			
	2008	2009	2010	2011	2008	2009	2010	2011
Americas	37,881	32,326	34,246	37,090	-10.5	-14.7	5.9	8.3
Europe	38,249	28,345	30,136	32,594	-6.6	-25.9	6.3	8.2
Japan	48,498	34,656	37,038	40,043	-0.7	-28.5	6.9	8.1
Asia Pacific	123,975	99,470	107,612	117,817	0.4	-19.8	8.2	9.5
Total World - \$M	248,603	194,797	209,032	227,544	-2.8	-21.6	7.3	8.9
Discrete Semiconductors	16,935	11,784	12,506	13,544	0.7	-30.4	6.1	8.3
Optoelectronics	17,902	14,969	16,251	17,725	12.6	-16.4	8.6	9.1
Sensors	5,111	3,380	3,666	3,971	-0.3	-33.9	8.4	8.3
Integrated Circuits	208,656	164,664	176,610	192,304	-4.2	-21.1	7.3	8.9
Analog	35,637	26,458	28,494	30,852	-2.2	-25.8	7.7	8.3
Micro	53,140	40,375	43,134	47,360	-5.5	-24.0	6.8	9.8
Logic	73,531	60,905	64,445	70,064	9.3	-17.2	5.8	8.7
Memory	46,348	36,926	40,536	44,028	-19.9	-20.3	9.8	8.6
Total Products - \$M	248,603	194,797	209,032	227,544	-2.8	-21.6	7.3	8.9

Note: Numbers in the table are rounded to whole millions of dollars, which may cause totals by region and totals by product group to differ slightly.

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