

## WSTS Semiconductor Market Forecast World Release Date: 29 October 2002

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WSTS is an independent non-profit organization representing about 90% of the world semiconductor industry (Internet address: [www.wsts.org](http://www.wsts.org)). These forecasts will be released twice a year, in May and October.

### *From The WSTS Board Of Directors:*

According to the World Semiconductor Trade Statistics (WSTS), the world semiconductor market will, after a decline of 32% in 2001, resume positive growth in 2002. The participants to the WSTS meeting confirmed the growth expectations for 2002 to be 2.3% consistent with the two preceding forecast meetings in autumn 2001 and spring 2002. WSTS revised downward expectations for 2003 (from \$173B to \$166B), mostly influenced by lower expectations for discrete semiconductors and microprocessors, however the following year 2004 is expected to return to the level as forecasted in spring 2002 (\$198B). The return to positive overall semiconductor industry growth in 2002 is led by the Asian region. All regions are expected to experience positive growth in 2003 with worldwide industry growth close to 17%. Memories, Digital Signal Processors and Sensors will show growth rates well above 20% in 2003, all other products will be closer to or below the overall market growth rate. WSTS projects the year 2004 to be the year of peak growth and expects a deceleration of semiconductor market growth thereafter, with growth rates of 19.2% for 2004 and 2.6% for 2005. The market size in 2005 would end up marginally below the peak year of 2000.

	Amounts in US\$M			Year on Year Growth in %		
	2002	2003	2004	2002	2003	2004
<b>Americas</b>	<b>31,743.1</b>	<b>35,233.1</b>	<b>41,384.2</b>	-11.3	11.0	17.5
<b>Europe</b>	<b>27,374.7</b>	<b>30,917.0</b>	<b>36,214.6</b>	-9.4	12.9	17.1
<b>Japan</b>	<b>30,911.3</b>	<b>36,279.3</b>	<b>42,113.3</b>	-6.7	17.4	16.1
<b>Asia Pacific</b>	<b>52,188.1</b>	<b>63,466.3</b>	<b>78,087.6</b>	31.1	21.6	23.0
<b>TOTAL WORLD</b>	<b>142,217.1</b>	<b>165,895.8</b>	<b>197,799.7</b>	2.3	16.6	19.2
<b>Discrete Semiconductors</b>	<b>12,527.8</b>	<b>13,965.8</b>	<b>16,124.6</b>	2.8	11.5	15.5
<b>Optoelectronics</b>	<b>6,769.7</b>	<b>7,893.0</b>	<b>9,251.2</b>	-8.2	16.6	17.2
<b>Sensors</b>	<b>1,043.9</b>	<b>1,297.2</b>	<b>1,668.6</b>	14.3	24.3	28.6
<b>Integrated Circuits</b>	<b>121,875.7</b>	<b>142,739.7</b>	<b>170,755.3</b>	2.9	17.1	19.6
Bipolar	232.1	201.4	180.0	-47.1	-13.2	-10.6
Analog	24,427.1	28,729.2	34,276.1	5.4	17.6	19.3
Micro	38,153.7	43,542.4	50,765.0	2.4	14.1	16.6
Logic	31,776.2	36,740.3	43,830.7	-2.9	15.6	19.3
Memory	27,286.5	33,526.4	41,703.4	9.7	22.9	24.4
<b>TOTAL PRODUCTS</b>	<b>142,217.1</b>	<b>165,895.8</b>	<b>197,799.7</b>	2.3	16.6	19.2

For further information, please consult:

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