

2010 Memory

Memory Service



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Susie Inouye

Myson Robles-Bruce

Matt Scherer

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Reno, NV 89523

Phone: 775.624.6200

www.databeans.net

Abstract

The memory market felt the full effects of the economic crisis in 2009. Long lasting over supply was spurred on by a massive imbalance between supply and demand. From 2005 to 2007, the capital expenditures on DRAM fabs was over \$50 billion as top producers frantically built facilities in order to meet growing demand. However, poor consumer sales, brought on by a weak global economy, caused demand for to plummet in 2008 and 2009, causing memory prices to fall and left a massive overstock of inventory. Vendors were forced to sell product below cost just to continue to recoup the fab investment made a couple of years earlier. Some vendors slashed output, while others sold off equipment and facilities in order to attempt to realign current demand with supply. While the market leaders Samsung and Intel managed to maintain profitability, especially in the second half of 2009, some manufacturers, such as Qimonda and Spansion, couldn't overcome these demand issues and filed for insolvency in the early part of 2009.

Although the market has remained challenging, 2010 looks to be considerably brighter as the end of the recession has spurred consumer demand, while memory prices have stabilized and are increasing again thanks to a reduction inventory in the channel and restocking activity has progressed. Databeans predicts that global memory revenue will reach \$57 billion in 2010 and account for 22 percent of the total \$258.7 billion semiconductor market. This is an industry best 28 percent improvement from 2009 sales. Going into the future, total memory revenue will grow an average 12 percent annually until it reaches \$99 billion in 2015.

Databeans separates the memory market according to type, including DRAM, Flash, SRAM, and other miscellaneous forms of memory which include PROMS and ROM. DRAM and Flash account for the vast majority of the market however, with 95 percent of all revenue combined.

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Table of Contents

Significant Findings	1
Introduction.....	1
Product Segmentation	5
DRAM.....	5
Flash.....	6
SRAM.....	8
Other Memory.....	9
Regional Forecast.....	11
Americas	15
Europe	17
Japan.....	19
Asia Pacific.....	21
Worldwide DRAM Forecast by Region	25
Worldwide Flash Forecast by Region.....	26
Worldwide SRAM Forecast by Region	27
Worldwide Other Memory Forecast by Region.....	28
Application Demand Analysis	29
Automotive	32
Computer	34
Consumer	38
Communications	42
Industrial.....	47
Worldwide DRAM Revenue Forecast by Market Segment	51
Worldwide Flash Revenue Forecast by Market Segment.....	52
Worldwide SRAM Revenue Forecast by Market Segment.....	53
Worldwide Other Memory Revenue Forecast by Market Segment.....	54
Production Analysis.....	55
DRAM	57
Flash	62
SRAM.....	69
Other Memory.....	72
Supplier Market Share	75
Samsung.....	83
Hynix.....	85
Toshiba	86
Micron Technology	87
Elpida.....	89
Numonyx.....	90
Spansion	91
Nanya.....	91
Qimonda.....	92

Methodology.....	93
Databeans Market and Product Segmentation Definitions	95
Market Segmentation.....	95
Product Segmentation	102

Table of Figures

Figure 1: Worldwide Semiconductor Revenue Forecast	2
Figure 2: Worldwide Memory Semiconductor Revenue Forecast	2
Figure 3: 2010 Worldwide Semiconductor Revenue Share by Product	3
Figure 4: Worldwide Memory Market Forecast (Revenue, Units, and ASP)	4
Figure 5: Worldwide DRAM Market Forecast (Revenue, Units, and ASP)	6
Figure 6: Worldwide Flash Market Forecast (Revenue, Units, and ASP).....	7
Figure 7: Worldwide SRAM Market Forecast (Revenue, Units, and ASP)	8
Figure 8: Worldwide Other Memory Market Forecast (Revenue, Units, and ASP)	9
Figure 9: Worldwide Memory Revenue Forecast by Region	12
Figure 10: 2010 and 2015 Worldwide Memory Revenue Share by Region	13
Figure 11: 2010 and 2015 Worldwide Memory Shipment Share by Region	14
Figure 12: Americas Memory Revenue Forecast	16
Figure 13: 2010 Americas Memory Revenue Share by Product.....	16
Figure 14: Europe Memory Revenue Forecast	18
Figure 15: 2010 Europe Memory Revenue Share by Product	18
Figure 16: Japan Memory Revenue Forecast.....	20
Figure 17: 2010 Japan Memory Revenue Share by Product.....	20
Figure 18: Asia Pacific Memory Revenue Forecast.....	22
Figure 19: 2010 Asia Pacific Memory Revenue Share by Product.....	22
Figure 20: Worldwide DRAM Revenue Forecast by Region.....	25
Figure 21: Worldwide Flash Revenue Forecast by Region	26
Figure 22: Worldwide SRAM Revenue Forecast by Region	27
Figure 23: Worldwide Other Memory Revenue Forecast by Region	28
Figure 24: 2010 and 2015 Worldwide Memory Revenue Share by Market Segment.....	30
Figure 25: Worldwide Memory Revenue Forecast by Market Segment	31
Figure 26: Worldwide Automotive Memory Revenue Forecast by Product.....	32

Figure 27: 2010 Worldwide Automotive Memory Revenue Share by Product	33
Figure 28: Worldwide Computer Memory Revenue Forecast by Product.....	35
Figure 29: 2010 Worldwide Computer Memory Revenue Share by Product.....	35
Figure 30: Worldwide Consumer Memory Revenue Forecast by Product.....	39
Figure 31: 2010 Worldwide Consumer Memory Revenue Share by Product	39
Figure 32: Worldwide Communications Memory Revenue Forecast by Product.....	42
Figure 33: 2010 Worldwide Communications Memory Revenue Share by Product	43
Figure 34: Worldwide Mobile Phone Shipment Forecast	45
Figure 35: Worldwide Industrial Memory Revenue Forecast by Product.....	47
Figure 36: 2010 Worldwide Industrial Memory Revenue Share by Product.....	48
Figure 37: Worldwide DRAM Revenue Forecast by Market Segment	51
Figure 38: Worldwide Flash Revenue Forecast by Market Segment	52
Figure 39: Worldwide SRAM Revenue Forecast by Market Segment.....	53
Figure 40: Worldwide Other Memory Revenue Forecast by Market Segment.....	54
Figure 41: Worldwide Memory Revenue Forecast by Product	56
Figure 42: 2010 and 2015 Worldwide Memory Revenue Share by Product	57
Figure 43: Worldwide DRAM Revenue Forecast.....	59
Figure 44: 2010 and 2015 Worldwide DRAM Revenue Share by Technology	60
Figure 45: 2010 and 2015 Worldwide DRAM Revenue Share by Density.....	61
Figure 46: Worldwide Flash Revenue Forecast (NAND and NOR)	64
Figure 47: Worldwide NOR Flash Revenue Forecast	65
Figure 48: 2010 Worldwide NOR Flash Revenue Share by Density.....	65
Figure 49: Worldwide NAND Flash Revenue Forecast.....	67
Figure 50: 2010 Worldwide NAND Flash Revenue Share by Density	68
Figure 51: Worldwide SRAM and Pseudo SRAM Revenue Forecast	70
Figure 52: 2010 Worldwide SRAM and Pseudo SRAM Revenue Share by Density and Speed	70
Figure 53: Worldwide Other Memory Market Forecast (Revenue, Units, and ASP)	73
Figure 54: 2009 Worldwide Memory Market Share by Supplier	75

Table of Tables

Table 1: Worldwide Semiconductor Revenue Forecast by Product.....	3
Table 2: Worldwide Memory Market Forecast (Revenue, Units, and ASP).....	4
Table 3: Worldwide DRAM Market Forecast (Revenue, Units, and ASP)	5
Table 4: Worldwide Flash Market Forecast (Revenue, Units, and ASP)	7
Table 5: Worldwide SRAM Market Forecast (Revenue, Units, and ASP).....	8
Table 6: Worldwide Other Memory Market Forecast (Revenue, Units, and ASP).....	9
Table 7: Worldwide Memory Revenue Forecast by Region	12
Table 8: Worldwide Memory Shipment Forecast by Region.....	12
Table 9: Worldwide DRAM Revenue Forecast by Region	25
Table 10: Worldwide DRAM Shipment Forecast by Region	25
Table 11: Worldwide Flash Revenue Forecast by Region.....	26
Table 12: Worldwide Flash Shipment Forecast by Region	26
Table 13: Worldwide SRAM Revenue Forecast by Region	27
Table 14: Worldwide SRAM Shipment Forecast by Region.....	27
Table 15: Worldwide Other Memory Revenue Forecast by Region	28
Table 16: Worldwide Other Memory Shipment Forecast by Region.....	28
Table 17: Worldwide Memory Revenue Forecast by Market Segment.....	31
Table 18: Worldwide Automotive Memory Revenue Forecast by Product	32
Table 19: Worldwide Computer Memory Revenue Forecast by Product	34
Table 20: Worldwide Computer Electronics Revenue Forecast by Application.....	37
Table 21: Worldwide Computer Electronics Shipment Forecast by Application	38
Table 22: Worldwide Consumer Memory Revenue Forecast by Product.....	40
Table 23: Worldwide Consumer Electronics Revenue Forecast by Application.....	41
Table 24: Worldwide Consumer Electronics Shipment Forecast by Application.....	41
Table 25: Worldwide Communications Memory Revenue Forecast by Product.....	43
Table 26: Worldwide Communications Electronics Revenue Forecast by Application.....	46
Table 27: Worldwide Communications Electronics Shipment Forecast by Application.....	46
Table 28: Worldwide Industrial Memory Revenue Forecast by Product.....	48
Table 29: Worldwide Industrial Electronics Revenue Forecast by Application Market	49
Table 30: Worldwide DRAM Revenue Forecast by Market Segment.....	51
Table 31: Worldwide Flash Revenue Forecast by Market Segment	52
Table 32: Worldwide SRAM Revenue Forecast by Market Segment.....	53

Table 33: Worldwide Other Memory Revenue Forecast by Market Segment	54
Table 34: Worldwide Memory Revenue Forecast by Product.....	55
Table 35: Worldwide Memory Shipment Forecast by Product.....	56
Table 36: Worldwide DRAM Revenue Forecast by Technology.....	60
Table 37: Worldwide DRAM Revenue Forecast by Density.....	62
Table 38: Worldwide DRAM Shipment Forecast by Density	62
Table 39: Worldwide Flash Revenue Forecast (NAND and NOR).....	64
Table 40: Worldwide NOR Flash Revenue Forecast by Density.....	66
Table 41: Worldwide NOR Flash Shipment Forecast by Density.....	66
Table 42: Worldwide NAND Flash Revenue Forecast by Density.....	67
Table 43: Worldwide NAND Flash Shipment Forecast by Density	67
Table 44: Worldwide SRAM and Pseudo SRAM Revenue Forecast by Density and Speed.....	71
Table 45: Worldwide SRAM and Pseudo SRAM Shipment Forecast by Density and Speed	71
Table 46: Worldwide Other Memory Market Forecast (Revenue, Units, and ASP).....	73
Table 47: 2009 and 2008 Worldwide Memory Market Share by Supplier	76
Table 48: 2009 and 2008 Americas Memory Market Share by Supplier	77
Table 49: 2009 and 2008 Europe Memory Market Share by Supplier	78
Table 50: 2009 and 2008 Japan Memory Market Share by Supplier.....	79
Table 51: 2009 and 2008 Asia Pacific Memory Market Share by Supplier	80
Table 52: 2009 and 2008 Worldwide DRAM Revenue Share by Supplier	81
Table 53: 2009 and 2008 Worldwide Flash Revenue Share by Supplier	81
Table 54: 2009 and 2008 Worldwide SRAM Revenue Share by Supplier.....	82
Table 55: 2009 and 2008 Worldwide Other Memory Revenue Share by Supplier.....	82

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Publication Number: 10MEMORY-Memory
Research Analyst: Susie Inouye
✉ sinouye@databeans.net
Research Analyst: Myson Robles-Bruce
✉ myson@databeans.net
Research Analyst: Matt Scherer
✉ matt@databeans.net
