

Mobile & Emerging Memory Market Tracker

More Bits But No Fistful of Dollars

By Michael Yang, Senior Analyst

Forecast**Frequency, Time Period**

- Annual: 1-year Historical, 5-year Forecast
- Quarterly: Previous, Current and 1-Year Forecast

Measures

- Factory Revenue
- Factory Unit Shipments
- Average Selling Prices
- Shipment Revenue
- Unit production

Regions, Markets

- Worldwide
- Americas
- Japan
- Europe
- Asia

Detail Level

- Product Type
- Density
- System Type
- Application Market

Market Share

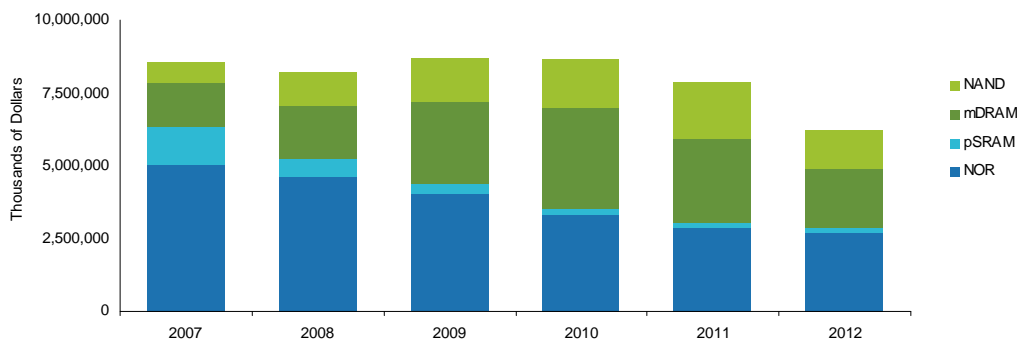
- Total Flash
- NOR
- SRAM

Technologies Covered

- NOR Flash including SPI, SRAM including Ppsram, Overall Memory Trends in Handsets including NAND and mobile SDRAM, Trends in MCP

The year 2008 was again not good for NOR and makes the fourth consecutive year of worsening market conditions for NOR. ASP erosion brutalized results for nearly all the players from a profit perspective. Traditionally over 60% percent of all NOR flash revenues are coming from the mobile handset market but the trend is reversing as the alternative memory solution of mobile DRAM and NAND are gaining in popularity in many models. This service provides a comprehensive look at the market for NOR flash with a focus on NOR as a participant in the memory subsystems of mobile handsets. NOR participation in other market segments is also addressed including a look at serial pin interface (SPI) NOR as a subset of the low density NOR flash market servicing the non-wireless or embedded application markets.

Memory Revenue in Handsets By Memory Type Forecast 2007 - 2012

**Critical Questions Answered**

- What's the future of NOR flash and the SRAM market?
- How is the market for pSRAM evolving?
- How is the market for Serial Pin Interface (SPI) NOR flash evolving?
- What are the memory trends in mobile handsets?
- What is the forecast for NOR-less handset growth?
- What are the supplier rankings for NOR and SRAM?

Who Should Read This?

- Semiconductor suppliers targeting handsets and embedded applications
 - Sourcing
- Wireless and Consumer Product Manufacturers
 - Procurement
 - Cost evaluation
- Memory Suppliers/Distributors
 - Marketing
 - Planning
- Financial Community

Lead Analyst**Michael Yang, Senior Analyst**

Michael is responsible for research in the areas of mobile flash memory and storage solutions including both solid state drives (SSDs) and hard disk drives (HDDs).

Prior to iSuppli, Michael worked Samsung Electronics Co. Ltd. where he led the product marketing efforts for SSDs and mobile memory chips. At Samsung, Michael expanded the company's mobile memory business, which included products like OneNAND, eMMC and MCP. He also held strategic and product marketing positions in both Fujitsu and Intel Corp's flash products group prior to his seven-year tenure at Samsung.

Michael earned a Masters of Business Administration at the University of California, Davis and a Bachelor of Science at California Polytechnic State University in San Luis Obispo.

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