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Forecasted 2006 Top 15 Semiconductor Supplier Ranking Released

AMD, Hynix, and Qimonda each expected to increase sales by more than 30%!

Scottsdale, Arizona – November 1, 2006 – IC Insights today released its forecast for the 2006 ranking of the worldwide top 15 semiconductor suppliers (Figure 1). As shown, IC Insights believes it will require at least $5.0 billion in sales to make the top 15 listing this year. The ranking includes companies from a wide geographic mix with 5 headquartered in the U.S., 4 in Europe, 3 in Japan, 2 in South Korea, and 1 in Taiwan.

2006 Top 15 Worldwide Semiconductor Supplier Ranking (Fcst, $M)

2006 Rank (Fcst)	2005 Rank	Company	Headquarters	1Q06 Sales ($M)	2Q06 Sales ($M)	1H06 Sales ($M)	3Q06 Sales ($M)	4Q06 Fcst ($M)	2H06 Sales ($M)	2006 Fcst ($M)	2005 Sales ($M)	06/05 % Change
1	1	Intel	U.S.	8,040	7,215	**15,255**	7,865	8,460	**16,325**	**31,580**	35,395	**-11%**
2	2	Samsung	South Korea	4,365	4,581	**8,946**	5,062	5,467	**10,529**	**19,475**	17,838	**9%**
3	3	TI	U.S.	3,260	3,505	**6,765**	3,579	3,526	**7,105**	**13,870**	11,300	**23%**
4	4	Toshiba	Japan	2,317	2,154	**4,471**	2,709	2,850	**5,559**	**10,030**	9,045	**11%**
5	5	ST	Europe	2,363	2,491	**4,854**	2,513	2,563	**5,076**	**9,930**	8,870	**12%**
6	7	TSMC*	Taiwan	2,389	2,522	**4,911**	2,515	2,289	**4,804**	**9,715**	8,217	**18%**
7	6	Renesas	Japan	1,963	2,083	**4,046**	2,052	2,072	**4,124**	**8,170**	8,266	**-1%**
8	8	Hynix	South Korea	1,522	1,635	**3,157**	2,027	2,191	**4,218**	**7,375**	5,599	**32%**
9	9	NXP	Europe	1,465	1,534	**2,999**	1,651	1,715	**3,366**	**6,365**	5,598	**14%**
10	9	Freescale	U.S.	1,465	1,535	**3,000**	1,554	1,526	**3,080**	**6,080**	5,598	**9%**
–	–	**Total Top 10**	–	**29,149**	**29,255**	**58,404**	**31,527**	**32,659**	**64,186**	**122,590**	**115,726**	**6%**
11	11	NEC	Japan	1,386	1,381	**2,767**	1,462	1,496	**2,958**	**5,725**	5,593	**2%**
12	12	Micron	U.S.	1,242	1,332	**2,574**	1,410	1,526	**2,936**	**5,510**	4,954	**11%**
13	16	AMD	U.S.	1,332	1,216	**2,548**	1,328	1,444	**2,772**	**5,320**	3,936	**35%**
14	13	Infineon**	Europe	1,227	1,250	**2,477**	1,285	1,293	**2,578**	**5,055**	4,802	**5%**
15	18	Qimonda***	Europe	1,118	1,227	**2,345**	1,310	1,350	**2,660**	**5,005**	3,495	**43%**
–	–	**Total Top 15**	–	**35,454**	**35,661**	**71,115**	**38,322**	**39,768**	**78,090**	**149,205**	**138,506**	**8%**

*Pure-Play Foundry **Not including Qimonda ***Spin-off from Infineon

Source: IC Insights, Company reports

Figure 1

As shown in Figure 1, pure-play foundry TSMC, microprocessor supplier AMD, and newly created memory IC specialist Qimonda (spun-off from Infineon), are the only top 15 companies expected to move up in the 2006 ranking. IC Insights believes that the top three positions are unlikely to change when the full-year 2006 results are posted. However, the number 4 and 5 spots are still "up for grabs" between ST and Toshiba. Ironically, there is also likely to be stiff competition between Infineon and its recent spin-off Qimonda for the 14th spot (left intact, Infineon could have ranked as high as fourth in 2006).

Three of the world's top 15 semiconductor suppliers are forecast to register greater than 30% growth in 2006 – AMD, Hynix, and Qimonda. The strength in the DRAM market, which is expected to increase 26% in 2006, has spurred a surge in sales at Hynix and Qimonda. AMD's 35% jump in 2006 sales illustrates its expected noticeable microprocessor marketshare increase this year (though AMD is currently still less than one-fifth the size of Intel). In contrast to the three high-growth companies mentioned above, Intel is forecast to post a sharp 11% decline in 2006 semiconductor sales.

In total, the top 15 companies' semiconductor sales are forecast to increase 8% this year, matching IC Insights' 8% forecast for total 2006/2005 worldwide semiconductor sales growth. It should be noted that, after excluding Intel, the remaining top 14 companies' combined semiconductor sales in 2006 are expected to jump 14%!

About IC Insights

IC Insights, Inc., based in Scottsdale, Arizona USA, is dedicated to providing high-quality, cost-effective market research for the semiconductor industry. Founded in 1997, IC Insights offers coverage of global economic trends, the semiconductor market forecast, capital spending and fab capacity trends, product market details, and technology trends, as well as complete IC company profiles and evaluations of end-use applications driving demand for ICs. For more information, contact +1-480-348-1133 or info@icinsights.com, or visit www.icinsights.com.