

# EXHIBIT G

**AMD**

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**Logic Demand/Capacity  
2001 - 2006**

# MPU Long Range Demand

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AMD

- Several cases modeled, per input from CPG
  - Maximum (2001 R6Q (23%); 2002-6: 23→28%)
  - Minimum ( No Comm T1; 2001 - 2006: 19%)
  - Best guess (No Comm T1 2001 only; 2002-2006: 20% → 23%)
  - Nominal (R6Q 2001; best guess beyond)
  
- Another case added (maximum +)
  - 30% market share 2002, beyond

# **Capacity Assumptions**

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**AMD**

- Tops down die ships/wafer
- Use of 0.13 $\mu$  foundry starting 2002, to 20% limitation
- Fab 30 at full 5000/week
- Fab 25 cases
  - Does not become long term MPU source (e.g., devoted to appliance, or Flash)
  - Is upgraded to produce HiP7/8 technology
- No IBM foundry source assumed

# When Will Fab 35 be Needed? AMD

## Preliminary Assessment

<u>Market</u>	<u>W/O F25</u>	<u>W/F25</u>
30%	2002	2002
Maximum	2003	2004
Best Guess	<u>2004</u>	<u>2006</u>
Minimum	2004	<u>&gt;2006</u>

# What About Fab 25?

# AMD

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## Logic

- 0.15 $\mu$  CS50 shrink
  - ... LI module concern
- 0.15 $\mu$  reverse shrink of 0.13 $\mu$  Athlon with Alum backend
  - ... provides short term extension
  - ... would still need to determine long term (Appliance?)  
logic role
- 0.13 $\mu$ /0.10 $\mu$  Copper
  - ... significant retool, but less than new fab
  - ... \$300 - 500M for 4-5K wafers/week capacity
  - ... results in long term MPU supply

## Flash

- Still possibility
  - ... Flash capacity increasing rapidly
  - ... watch demand

# Possible Scenario

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AMD

- Assume nominal demand case
- Upgrade Fab 25
- Defer Fab 35; eventually place in Dresden → 2006

## Advantages

- + less capital investment near term; good ROI
- + capitalizes on  $\mu$ P expertise in Austin
- + allows for more maturity of 300mm tools, process
- + less conflict with Fab 30 ramp

## Disadvantages

- could defer 300mm too long
- partnership options may diminish
- G/A opportunities may expire 04?

# What's Next?

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# AMD

- Create financial model

① Fab 25 as is, with Fab 35 in 2003

② Fab 25 upgraded, with Fab 35 in 2005

Assuming nominal case

... With sensitivity analysis on market share

- Firm up Saxony G/A
- Re 300mm partner -- assess need and options



# How Am I Leaning?

# AMD

- Upgrade Fab 25; defer Fab 35
  - Due diligence to plan
  - Must support HiP8
- Engage with Foundry
  - As 0.13 $\mu$  supplier
  - Preserve opportunity for larger relationship
    - JV 300mm partner
- Why?
  - Demand uncertainty
  - Retains option to partner with Moto in 300mm development without complication of other 300mm manufacturing partner
  - Still early for 300mm
    - Lower risk (financial)
    - Cross learning between

*could cash go wrong?  
- demand up/down*

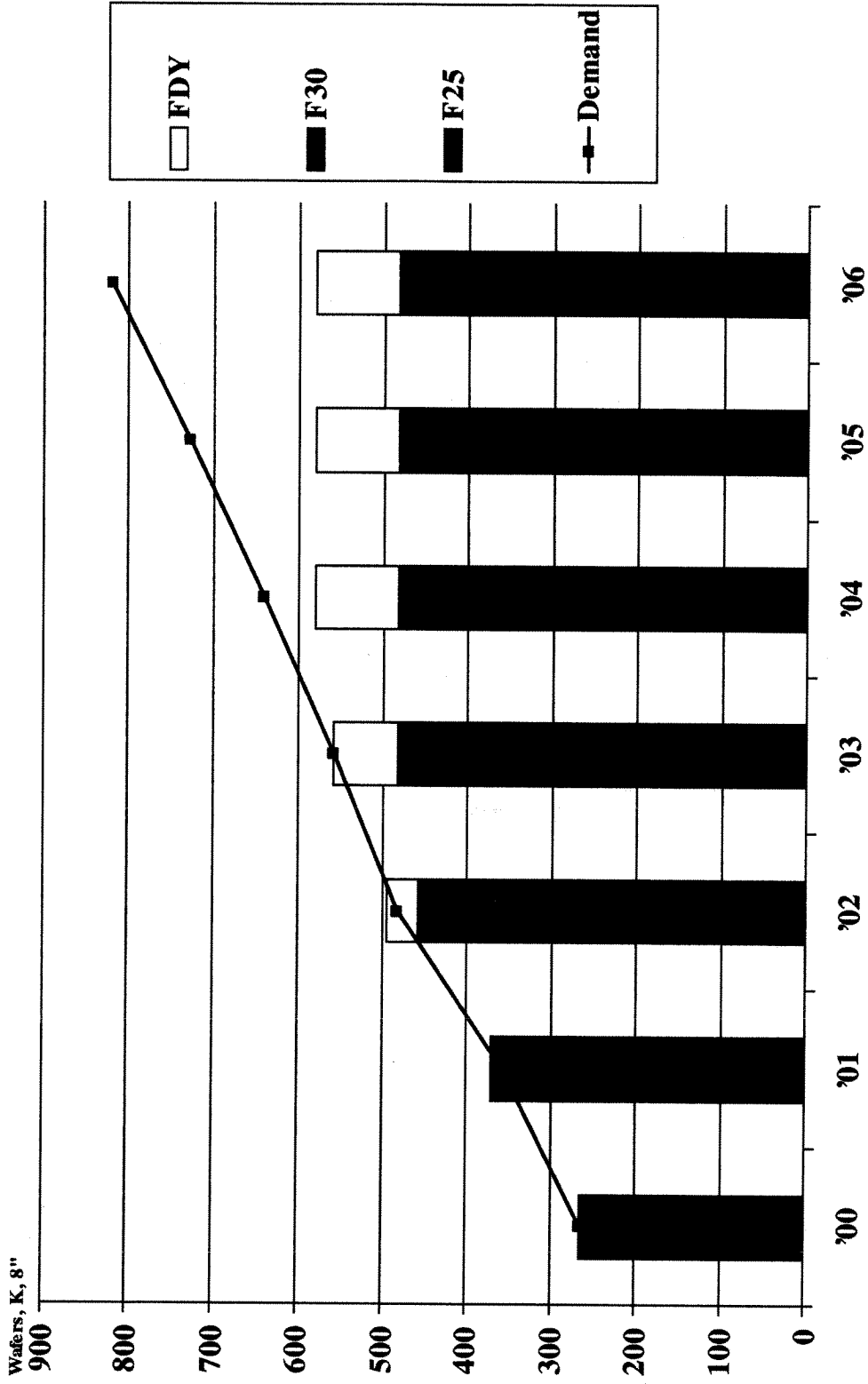
*capital*

*cash flow in time*

# FAB WAFER CAPACITY VS. DEMAND



CASE 037 Maximum (F25 Copper, Market Share is 23%, 26%, 27%, 28%, 29% for '01 - '05)



# Case 037 Maximum

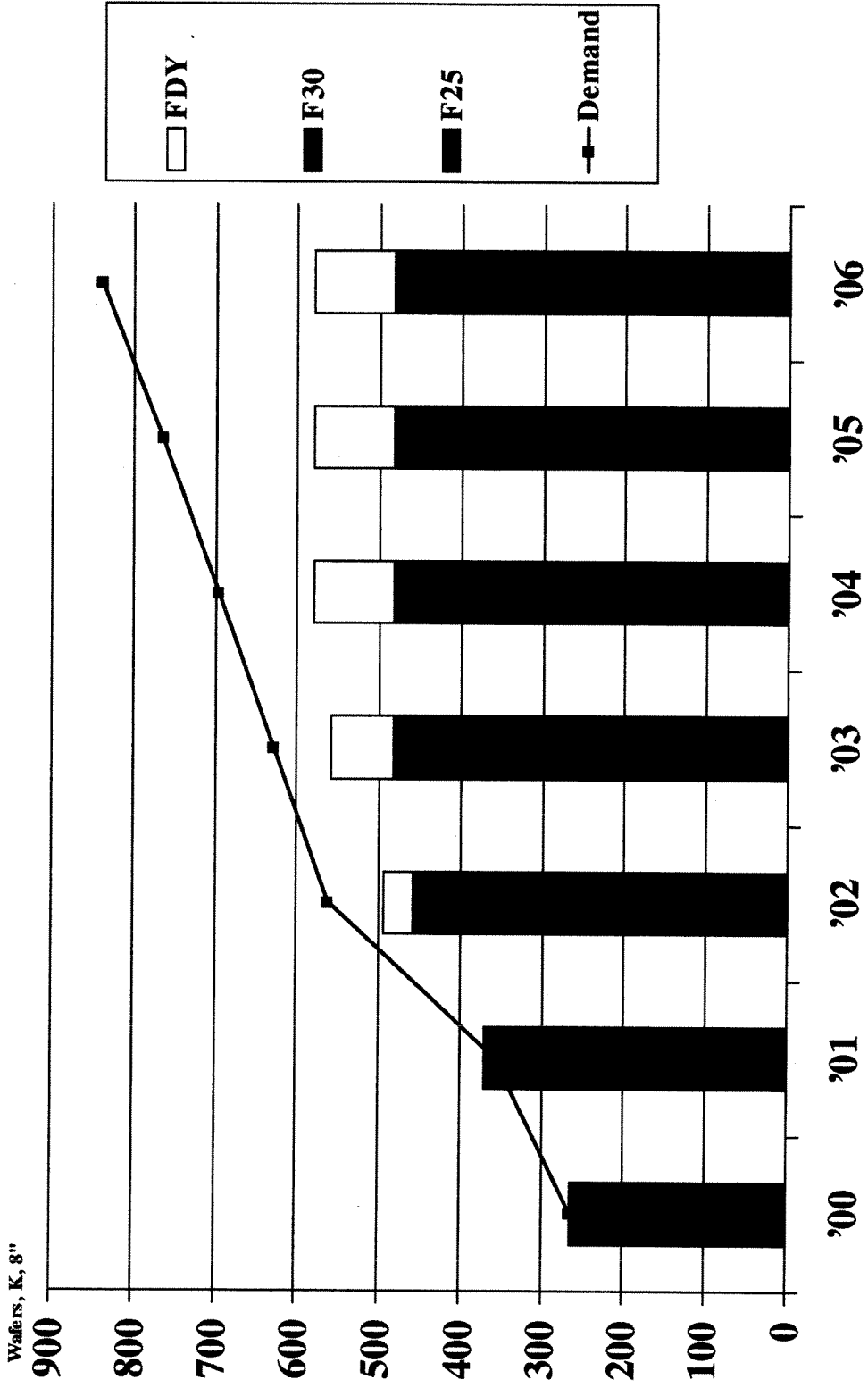
3Q R6Q

Wafers Out (K)	Act		Est		3Q R6Q						YR00	YR01	YR02	YR03	YR04	YR05	YR06	
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01								YR02
Capacity																		
Feb 25, CS44	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Feb 25, CS50	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Total Feb 25	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Total Feb 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1	
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1	483.1	
Die Demand (M)																		
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	60.10	69.95	80.75	91.94	103.89	103.89	103.89	
Growth Yr to Yr									49%	49%	20%	16%	15%	14%	13%			
Die Ships Per Water																		
PC Processors	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130	130	130	
Water Demand (K)																		
Feb 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6								
Feb 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	208.0	208.0	208.0	208.0	208.0	208.0	
Feb 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0	20.0	20.0	
Feb 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Feb 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1	
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	462.3	538.1	621.2	707.2	799.2	799.2	799.2	
Wafer Support (K)																		
Feb 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6								
Feb 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	208.0	208.0	208.0	208.0	208.0	208.0	
Feb 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0	20.0	20.0	
Feb 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Feb 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1	
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6	96.6	96.6	
Percentage of Total											8%	16%	20%	20%	20%	20%	20%	
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	538.1	559.7	559.7	559.7	559.7	559.7	
Delta Support Processors	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.2	0.0	-61.4	-147.5	-239.5	-239.5	-239.5	
8" Equivalent											5.4	0.0	-27.3	-65.6	-106.4	-106.4	-106.4	
Delta Capacity Feb 25	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	13.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Delta Capacity Feb 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

Feb 30 capacity based on plan 5000\_2 dated 8/8/00  
 Feb 25 converts to copper  
 Market share is 23%, 26%, 27%, 28%, 29%, for 2001-2005.

# FAB WAFER CAPACITY VS. DEMAND

CASE 037 Maximum+ (F25 Copper, Market Share is 30% for '02 - '06)



# Case 037 Maximum+

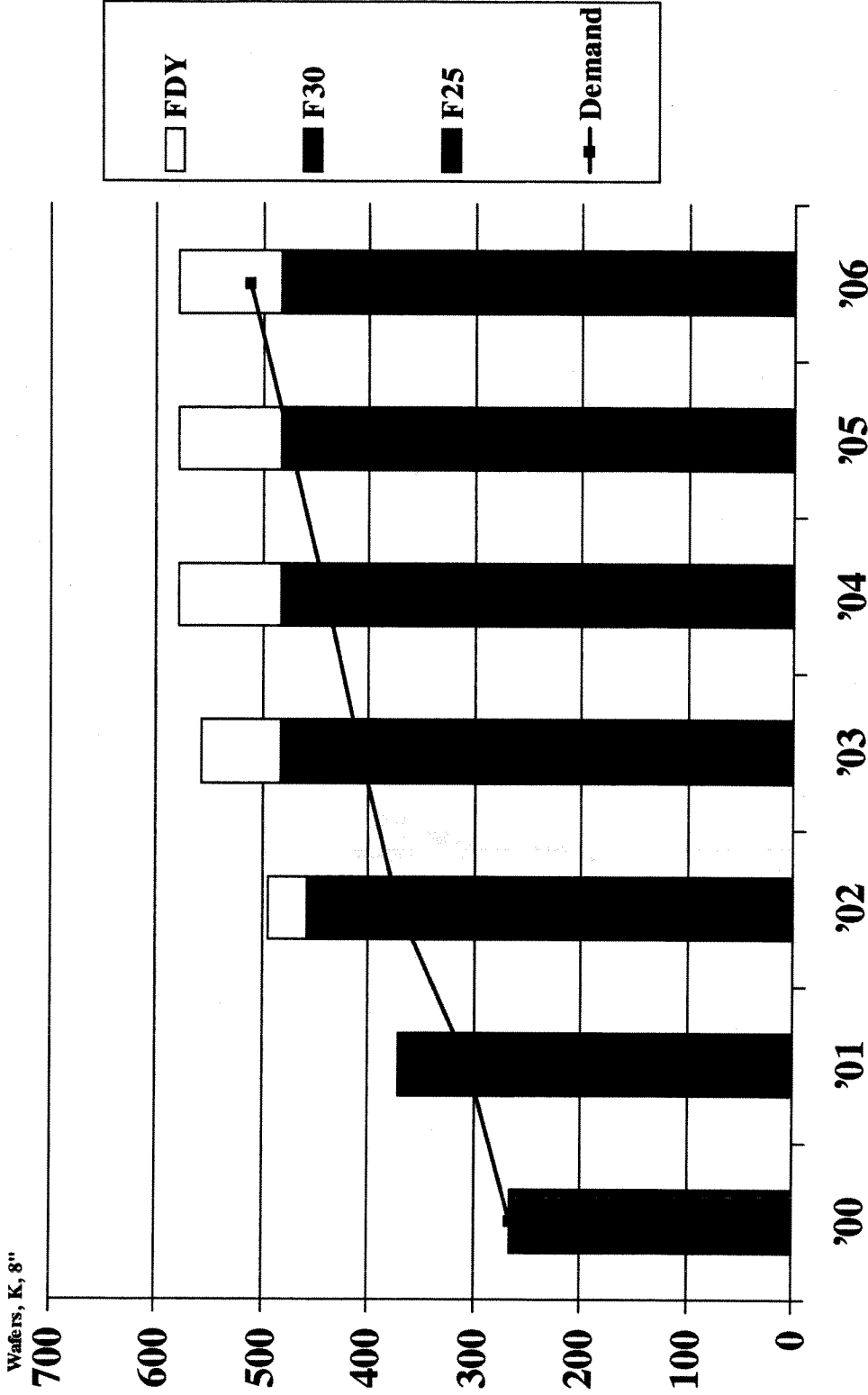
3Q R6Q

Wafers Out (K)	Act		Est		3Q R6Q						YR00	YR01	YR02	YR03	YR04	YR05	YR06	
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01								YR02
Capacity																		
Fab 25, CS44	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Fab 25, CS50	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Total Fab 25	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1	
Total uP/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1	483.1	
Die Demand (M)																		
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	70.33	78.98	87.90	96.69	106.36			
Growth Yr to Yr									49%	49%	41%	12%	11%	10%	10%			
Die Ships Per Wafer																		
PC Processors	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130	130	130	
Based on Die divided by wafers																		
Wafer Demand (K)																		
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6								
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	208.0	208.0	208.0	208.0	208.0	208.0	
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0	20.0	20.0	
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1	
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6	96.6	96.6	
Percentage of Total											8%	16%	20%	20%	20%	20%	20%	
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	538.1	559.7	559.7	559.7	559.7	559.7	
Delta Support Processors	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-66.5	-69.4	-116.4	-184.0	-258.4			
8" Equivalent											-29.6	-30.9	-51.7	-81.8	-114.9			
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	7.1	5.9	0.0	0.0	0.1	13.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 converts to copper  
 30% Market Share 2002-2006

# FAB WAFER CAPACITY VS. DEMAND

CASE 037 Minimum (F25 Copper, Market Share is 19% for '01 - '05)



# Case 037 Minimum

3Q Req

Wafers Out (K)	Act 1000	Act 2000	Est 3000	4Q00	YR00	YR01	YR02	YR03	YR04	YR05	YR06
Capacity											
Fab 25, CS44	39.3	21.0	16.4	11.9	88.6	8.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS50	18.5	32.9	48.2	51.1	150.7	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	63.0	239.3	236.0	228.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
<b>Total up/Emb Capacity</b>	<b>57.8</b>	<b>53.9</b>	<b>73.8</b>	<b>80.4</b>	<b>265.9</b>	<b>370.9</b>	<b>458.5</b>	<b>483.1</b>	<b>483.1</b>	<b>483.1</b>	<b>483.1</b>
Die Demand (M)											
PC Processors	7.49	6.77	8.69	10.65	33.60	42.34	45.69	50.46	54.70	59.31	64.05
					26%		8%	10%	8%	8%	8%

Growth Yr to Yr

Die Ships Per Wafer	Based on Die divided by wafers										
PC Processors	130	126	120	136	128	145	130	130	130	130	130
	130	126	120	136	128	145	130	130	130	130	130

Wafer Demand (K)	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6				
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5				
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9				
<b>Fab 25</b>	<b>57.8</b>	<b>53.9</b>	<b>64.5</b>	<b>63.0</b>	<b>239.2</b>	<b>171.0</b>				

Fab 30 PC Processors	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30
Fab 30 PC Processors	0.0	0.0	9.2	17.4	26.6	134.9				
<b>Total PC Processor Demand</b>	<b>57.8</b>	<b>53.9</b>	<b>72.2</b>	<b>78.5</b>	<b>262.4</b>	<b>293.0</b>	<b>351.5</b>	<b>386.2</b>	<b>420.8</b>	<b>456.2</b>

Wafer Support (K)	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6				
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5	121.0	133.1	165.7	201.1
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9	20.0	20.0	20.0	20.0
<b>Fab 25</b>	<b>57.8</b>	<b>53.9</b>	<b>64.5</b>	<b>63.0</b>	<b>239.2</b>	<b>171.0</b>	<b>141.0</b>	<b>153.1</b>	<b>185.7</b>	<b>221.1</b>

Fab 30 Processor	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30
Fab 30 Processor	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1
<b>Foundry Processor Support</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>36.0</b>	<b>75.0</b>	<b>96.6</b>	<b>96.6</b>
							10%	18%	22%	20%

Percentage of Total

Total Processor Support	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30
Total Processor Support	57.8	53.9	72.2	78.5	262.4	293.0	387.5	463.2	517.4	552.8
<b>Delta Support Processors</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>36.0</b>	<b>75.0</b>	<b>96.6</b>	<b>96.6</b>
<b>8" Equivalent</b>							<b>16.0</b>	<b>33.4</b>	<b>42.9</b>	<b>42.9</b>

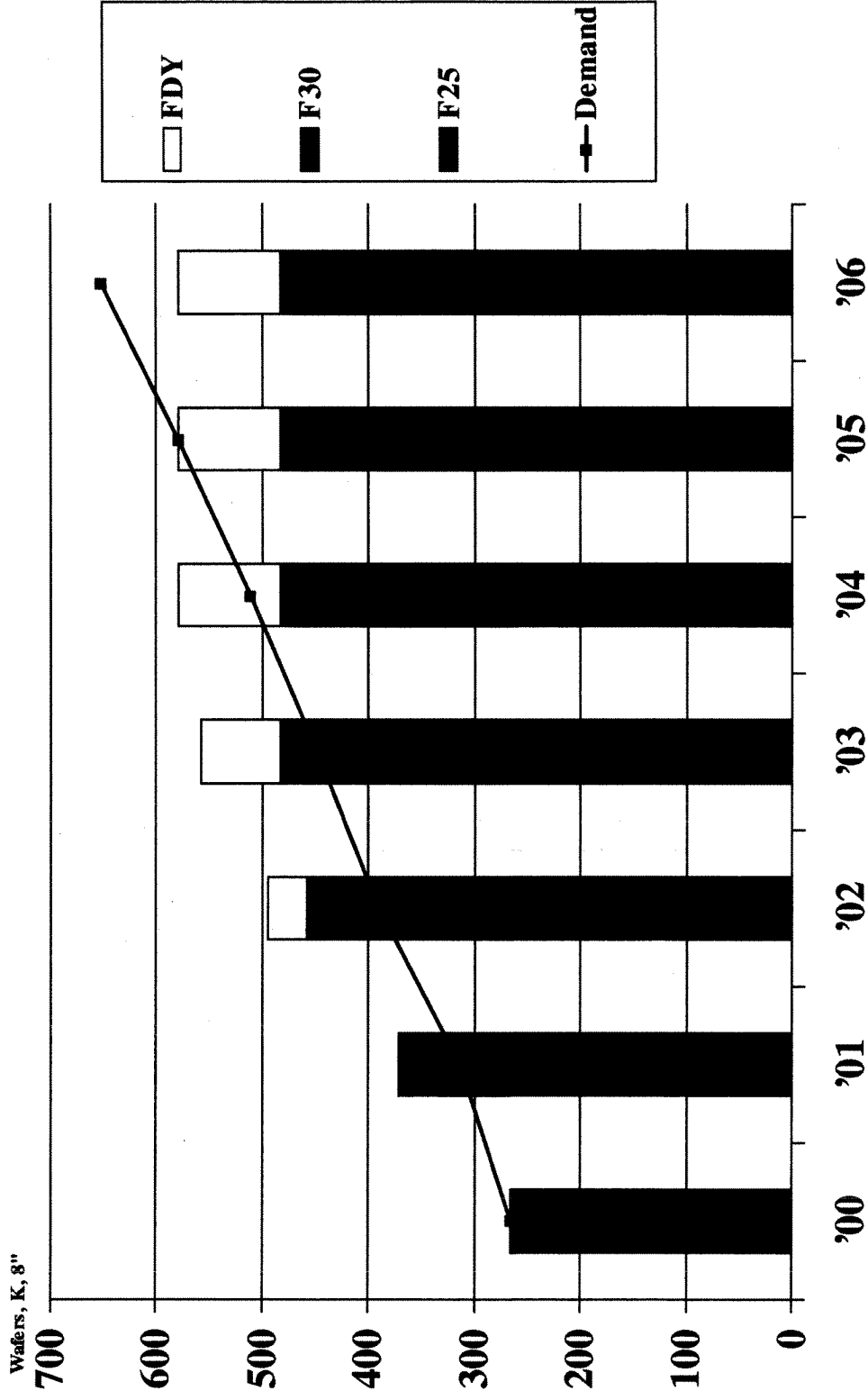
Delta Capacity Fab 25	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30	Fab 25	Fab 30
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.1	65.0	87.0	74.9	42.3	6.9
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 converts to copper  
 Market share is 19% for 2001-2005.

# FAB WAFER CAPACITY VS. DEMAND



CASE 037 Best Guess (F25 Copper, Market Share is 20%, 21%, 21%, 22%, 23% for '01 - '05)





# Case 037 Best Guess

3Q R60

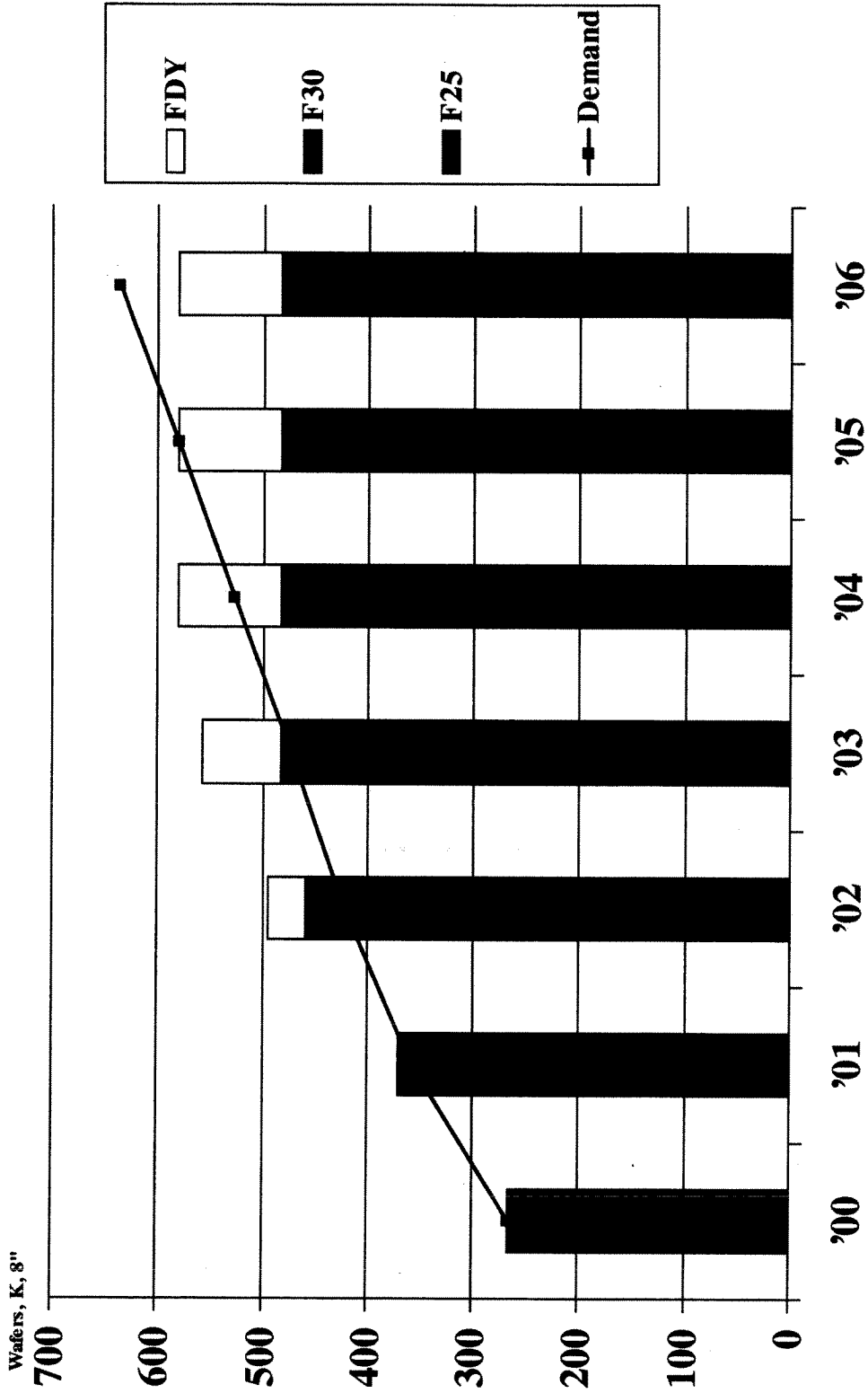
Wafers Out (K)	Act		Est		4Q00	YR00	YR01	YR02	YR03	YR04	YR05	YR06	
	1000	2000	3000										
<b>Capacity</b>													
Fab 25, CS44	39.3	21.0	16.4	11.9	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0	
Fab 25, CS50	18.5	32.9	48.2	51.1	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
<b>Total Fab 25</b>	57.8	53.9	64.6	63.0	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0	
<b>Total Fab 30</b>	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	
<b>Total uP/Emb Capacity</b>	57.8	53.9	73.8	80.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1	
<b>Die Demand (M)</b>													
PC Processors	7.49	6.77	8.69	10.65	33.60	43.34	48.16	55.66	63.84	72.67	82.12	82.12	
						29%	11%	16%	15%	14%	13%	13%	
<b>Growth Year to Year</b>													
<b>Die Ships Per Wafer</b>													
PC Processors	130	126	120	136	128	144	130	130	130	130	130	130	
		Based on Die divided by wafers											
<b>Water Demand (K)</b>													
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6							
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	158.5							
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9							
<b>Fab 25</b>	57.8	53.9	64.5	63.0	239.2	178.0							
<b>Fab 30 PC Processors</b>	0.0	0.0	9.2	17.4	26.6	134.9							
<b>Total PC Processor Demand</b>	57.8	53.9	72.2	78.5	262.4	300.0	370.5	428.2	491.1	559.0	631.7		
<b>Wafer Support (K)</b>													
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6							
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	158.5							
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9							
<b>Fab 25</b>	57.8	53.9	64.5	63.0	239.2	178.0							
<b>Fab 30 Processor</b>	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	
<b>Foundry Processor Support</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6	
								0%	17%	22%	20%	20%	
<b>Total Processor Support</b>	57.8	53.9	72.2	78.5	262.4	300.0	425.0	488.6	510.2	559.7	559.7	559.7	
<b>Delta Support Processors 8" Equivalent</b>	0.0	0.0	0.0	0.0	0.0	0.0	54.5	60.4	19.1	0.7	-72.0	-72.0	
							24.2	26.9	8.5	0.3	-32.0	-32.0	
<b>Delta Capacity Fab 25</b>	0.0	0.0	0.1	0.0	0.1	58.0	49.5	49.5	49.5	0.0	0.0	0.0	
<b>Delta Capacity Fab 30</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 converts to copper  
 Market share is 20%, 21%, 21%, 22%, 23% for 2001-2005.

# FAB WAFER CAPACITY VS. DEMAND



CASE 037 Nominal (F25 Copper, Market Share is 23%, 22%, 22%, 23%, 23% for '01 - '05)



# Case 037 Nominal

## 3Q R6Q

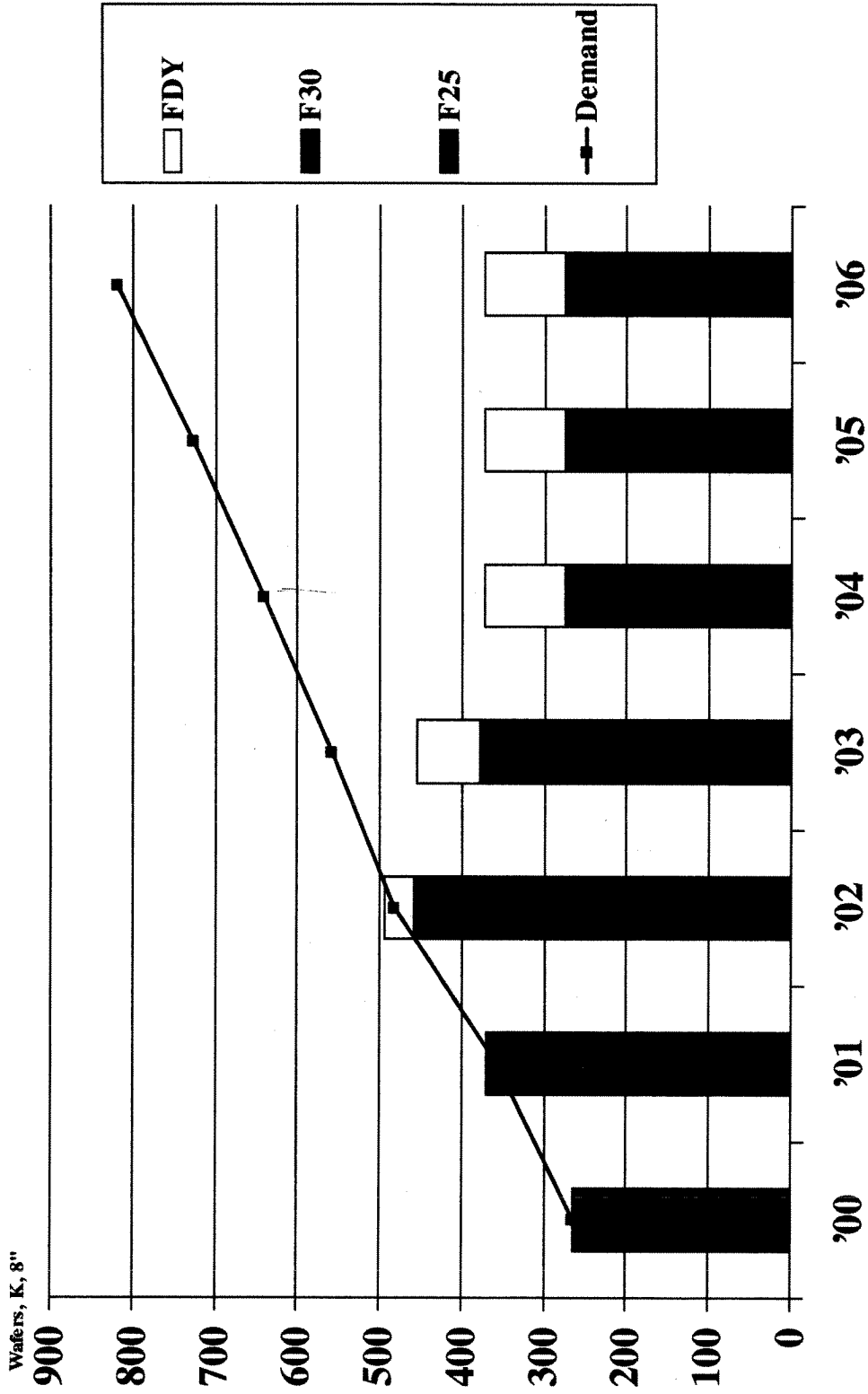
Wafers Out (K)	Act		Est		3Q R6Q						YR06			
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01		YR02	YR03	YR04
Capacity	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0
Fab 25, CS44	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	456.5	483.1	483.1	483.1
Die Demand (M)	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	52.36	58.90	65.93	72.79
PC Processors										49%	5%	12%	12%	10%
Growth Yr to Yr														
Die Ships Per Wafer	130	126	120	136	142	145	145	148	128	145	130	130	130	130
PC Processors														
Based on Die divided by wafers														
Wafer Demand (K)	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6				
Fab 25 CS44 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	208.0	208.0	208.0
Fab 25 CS50 PC	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0
Fab 25 EPD Embedded	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1
Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	402.8	453.1	507.2	559.9
Judged														
Wafer Support (K)	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6				
Fab 25 CS44 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	208.0	208.0	208.0
Fab 25 CS50 PC	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0
Fab 25 EPD Embedded	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1
Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6
Percentage of Total											8%	16%	20%	20%
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	538.1	559.7	559.7
Delta Support Processors	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	71.7	85.0	52.5	-0.2
8" Equivalent											31.9	37.8	23.4	-0.1
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	7.1	5.9	0.0	0.0	0.1	13.0	0.0	0.0	0.0	0.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 converts to copper  
 Market share is 23%, 22%, 22%, 23%, 23%, for 2001-2005.

# FAB WAFER CAPACITY VS. DEMAND



CASE 037A Maximum (F25 Aluminum, Market Share is 23%, 26%, 27%, 28%, 29% for '01 - '05)



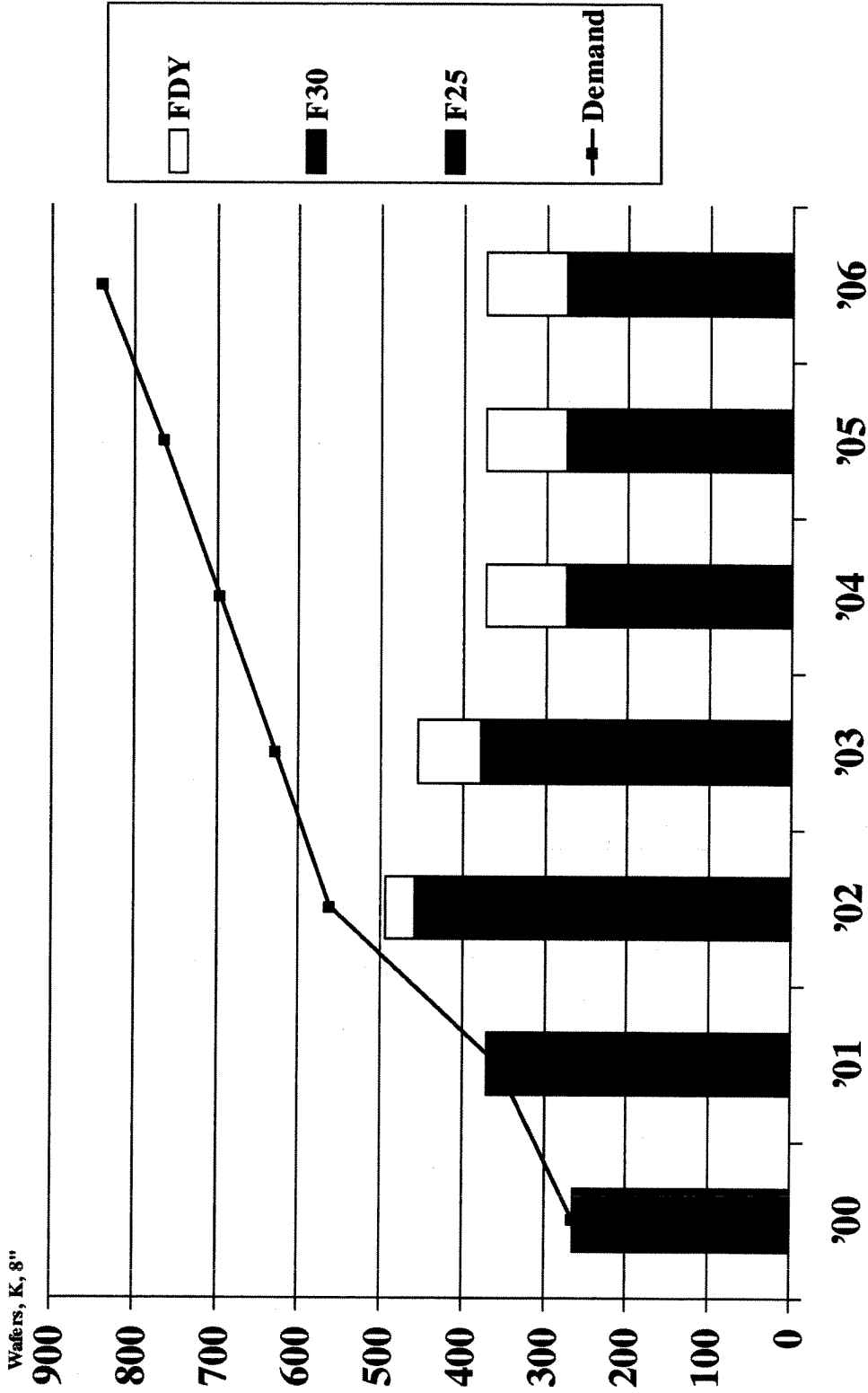
# Case 037A Maximum 3Q R6Q

Wafers Out (K)	Act		Est		3Q R6Q						YR00	YR01	YR02	YR03	YR04	YR05	YR06	
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01								YR02
Capacity																		
Fab 25, CS44	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Fab 25, CS50	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Total Fab 25	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0	
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1	
Total uP/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1	483.1	
Die Demand (M)																		
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	60.10	69.95	80.75	91.94	103.89	113.13	130	
Growth Yr to Yr																		
Based on Die divided by wafers																		
Die Ships Per Wafer	130	126	120	136	142	145	148	145	128	145	130	130	130	130	130	130	130	
PC Processors																		
Wafer Demand (K)																		
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6								
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5								
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9								
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223								
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9								
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	462.3	538.1	621.2	707.2	799.2			
Wafer Support (K)																		
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6								
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	104.0	0.0	0.0	0.0	0.0	0.0	
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0	20.0	20.0	
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	124.0	20.0	20.0	20.0	20.0	20.0	
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1	
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6	96.6	96.6	
Percentage of Total											8%	20%	35%	35%	35%	35%	35%	
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	434.1	351.7	351.7	351.7	351.7	351.7	
Delta Support Processors	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.2	-104.0	-268.5	-355.5	-447.5			
8" Equivalent											5.4	-46.2	-119.8	-156.0	-198.9			
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	13.0	0.0	104.0	208.0	208.0	208.0	208.0	208.0	
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 does not convert to copper  
 Market share is 23%, 26%, 27%, 28%, 29%, for 2001-2005.

# FAB WAFER CAPACITY VS. DEMAND

CASE 037A Maximum+ (F25 Aluminum, Market Share is 30% for '02 - '06)



# Case 037A Maximum+

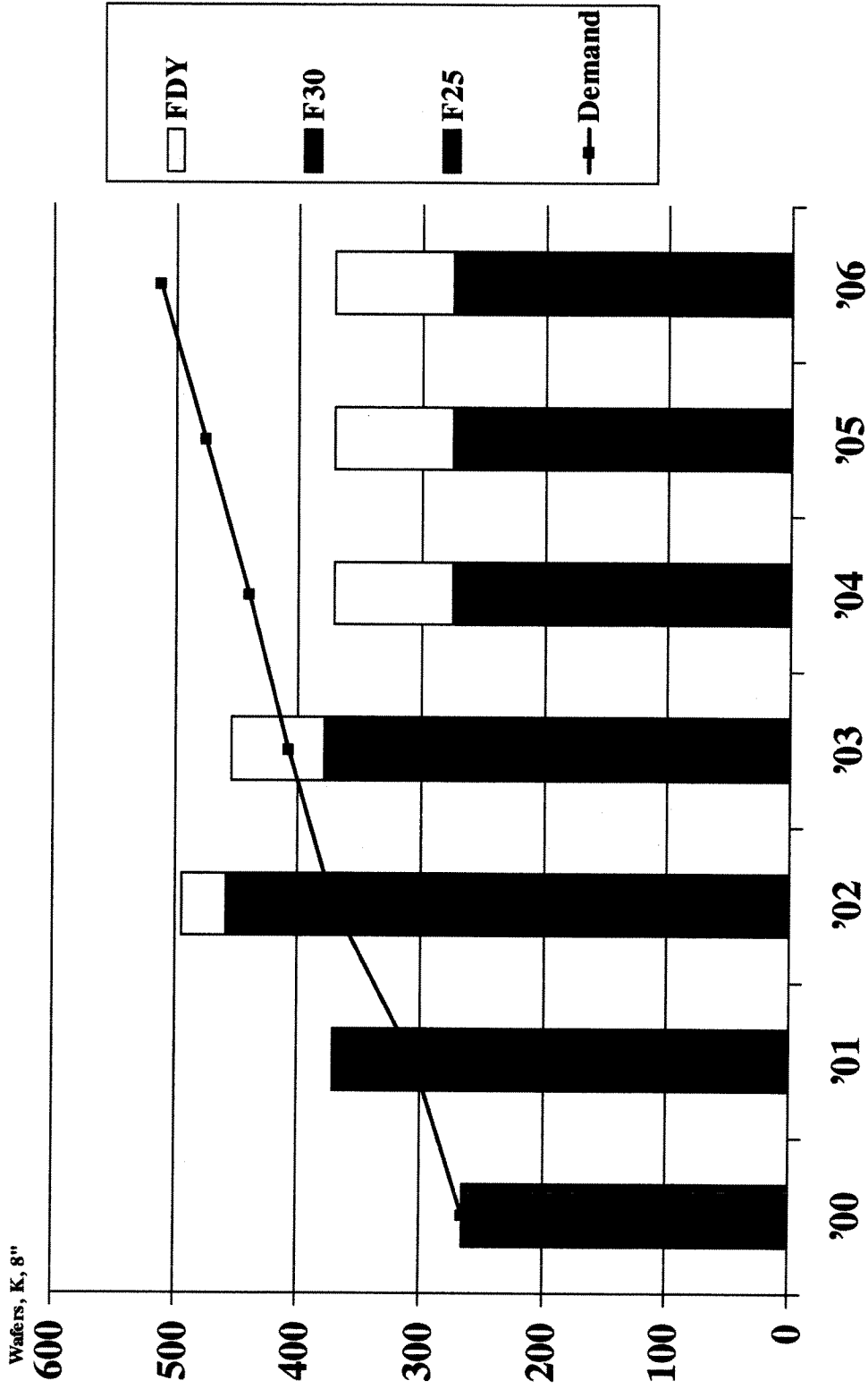
## 3Q R6Q

Wafers Out (K)	Act		3Q R6Q						YR00	YR01	YR02	YR03	YR04	YR05	YR06
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01							
Capacity	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS44	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0
Fab 25, CS50	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25															
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	456.5	483.1	483.1	483.1	483.1
Die Demand (M)	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	70.33	78.98	87.90	96.69	106.36
PC Processors										49%	41%	12%	11%	10%	10%
Based on Die divided by wafers															
Die Ships Per Wafer	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130
PC Processors															Judged
Wafer Demand (K)	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6					
Fab 25 CS44 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	104.0	0.0	0.0	0.0
Fab 25 CS50 PC	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0
Fab 25 EPD Embedded	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	124.0	20.0	20.0	20.0
Fab 25															
Fab 30	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223					
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9					
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	541.0	607.5	676.2	743.8	818.2
Wafer Support (K)	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6					
Fab 25 CS44 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	104.0	0.0	0.0	0.0
Fab 25 CS50 PC	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0
Fab 25 EPD Embedded	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	124.0	20.0	20.0	20.0
Fab 25															
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6
Percentage of Total											8%	20%	35%	35%	35%
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	434.1	351.7	351.7	351.7
Delta Support Processors	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-66.5	-173.4	-324.5	-392.1	-466.5
8" Equivalent											-29.6	-77.1	-144.2	-174.3	-207.3
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	7.1	5.9	0.0	0.0	0.1	13.0	0.0	104.0	208.0	208.0	208.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000\_2 dated 8/9/00  
 Fab 25 does not convert to copper  
 30% market share 2002-2006

# FAB WAFER CAPACITY VS. DEMAND

CASE 037A Minimum (F25 Aluminum, Market Share is 19% for '01 - '05)





# Case 037A Minimum

30 R6Q

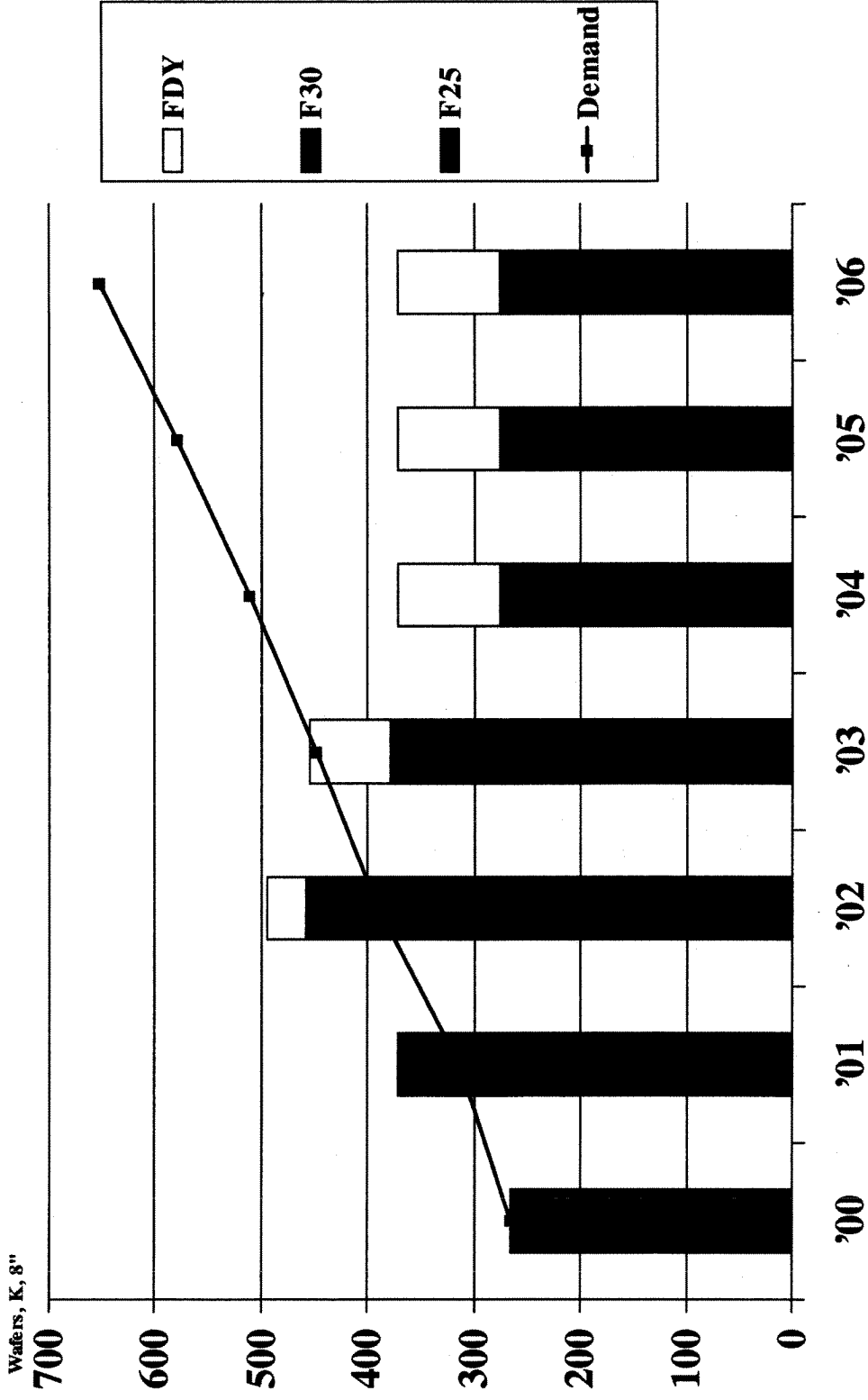
Wafers Out (K)	Act		Est		YR00	YR01	YR02	YR03	YR04	YR05	YR06
	1Q00	2Q00	3Q00	4Q00							
Capacity											
Fab 25, CS44	39.3	21.0	16.4	11.9	88.6	8.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS50	18.5	32.9	48.2	51.1	150.7	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	63.0	239.3	236.0	228.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Total up/Emb Capacity	57.8	53.9	73.8	80.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1
Die Demand (M)											
PC Processors	7.49	6.77	8.69	10.65	33.60	42.34	45.69	50.46	54.70	59.31	64.05
						26%	8%	10%	8%	8%	8%
Growth Yr to Yr											
Die Ships Per Wafer											
PC Processors	130	126	120	136	128	145	130	130	130	130	130
Water Demand (K)											
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6					
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5					
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9					
Fab 25	57.8	53.9	64.5	63.0	239.2	171.0					
Fab 30 PC Processors	0.0	0.0	9.2	17.4	26.6	134.9					
Total PC Processor Demand	57.8	53.9	72.2	78.5	262.4	293.0	351.5	388.2	420.8	456.2	492.7
Wafer Support (K)											
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6					
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5	121.0	104.0	0.0	0.0	0.0
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9	20.0	20.0	20.0	20.0	20.0
Fab 25	57.8	53.9	64.5	63.0	239.2	171.0	141.0	124.0	20.0	20.0	20.0
Fab 30 Processor	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6
Percentage of Total							0%	10%	20%	35%	35%
Total Processor Support	57.8	53.9	72.2	78.5	262.4	293.0	387.5	434.1	351.7	351.7	351.7
Delta Support Processors											
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	36.0	45.9	-69.1	-104.5	-141.0
							16.0	20.4	-30.7	-46.5	-62.7
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.1	65.0	87.0	104.0	208.0	208.0	208.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 does not convert to copper  
 Market share is 19% for 2001-2005.

# FAB WAFER CAPACITY VS. DEMAND



CASE 037A Best Guess (F25 Aluminum, Market Share is 20%, 21%, 21%, 22%, 23% for '01 - '05)



# Case 037A Best Guess

3Q R6Q

Wafers Out (K)	Act		Est		4000	YR00	YR01	YR02	YR03	YR04	YR05	YR06
	1Q00	2Q00	3Q00									
Capacity												
Fab 25, CS44	39.3	21.0	16.4	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS50	18.5	32.9	48.2	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	239.3	239.3	228.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1
<b>Total uP/Emb Capacity</b>	<b>57.8</b>	<b>53.9</b>	<b>73.8</b>	<b>80.4</b>	<b>265.9</b>	<b>370.9</b>	<b>458.5</b>	<b>483.1</b>	<b>483.1</b>	<b>483.1</b>	<b>483.1</b>	<b>483.1</b>
Die Demand (M)												
PC Processors	7.49	6.77	8.69	10.65	33.60	43.34	48.16	55.66	63.84	72.67	82.12	92.12
						29%	11%	16%	15%	14%	13%	13%

Growth Year to Year

Die Ships Per Wafer PC Processors	Based on Die divided by wafers											
	130	126	120	136	128	144	130	130	130	130	130	130

## Wafer Demand (K)

Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	158.5
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9

Feb 25

	57.8	53.9	64.5	63.0	239.2	178.0
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## Foundry Processor Support

Fab 30 PC Processors	0.0	0.0	9.2	17.4	26.6	134.9
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## Total PC Processor Demand

	57.8	53.9	72.2	78.5	262.4	300.0	370.5	428.2	491.1	559.0	631.7
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## Wafer Support (K)

Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	158.5
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9

Feb 25

	57.8	53.9	64.5	63.0	239.2	178.0
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## Fab 30 Processor

	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
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## Foundry Processor Support

Percentage of Total	0.0	0.0	0.0	0.0	0.0	0.0	0%	9%	20%	35%	35%
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## Total Processor Support

	57.8	53.9	72.2	78.5	262.4	300.0	425.0	434.1	351.7	351.7	351.7
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## Delta Support Processors 8" Equivalent

	0.0	0.0	0.0	0.0	0.0	0.0	54.5	5.9	-139.4	-207.3	-280.0
							24.2	2.6	-61.9	-92.1	-124.4

## Delta Capacity Fab 25

	0.0	0.0	0.1	0.0	0.1	58.0	49.5	104.0	208.0	208.0	208.0
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## Delta Capacity Fab 30

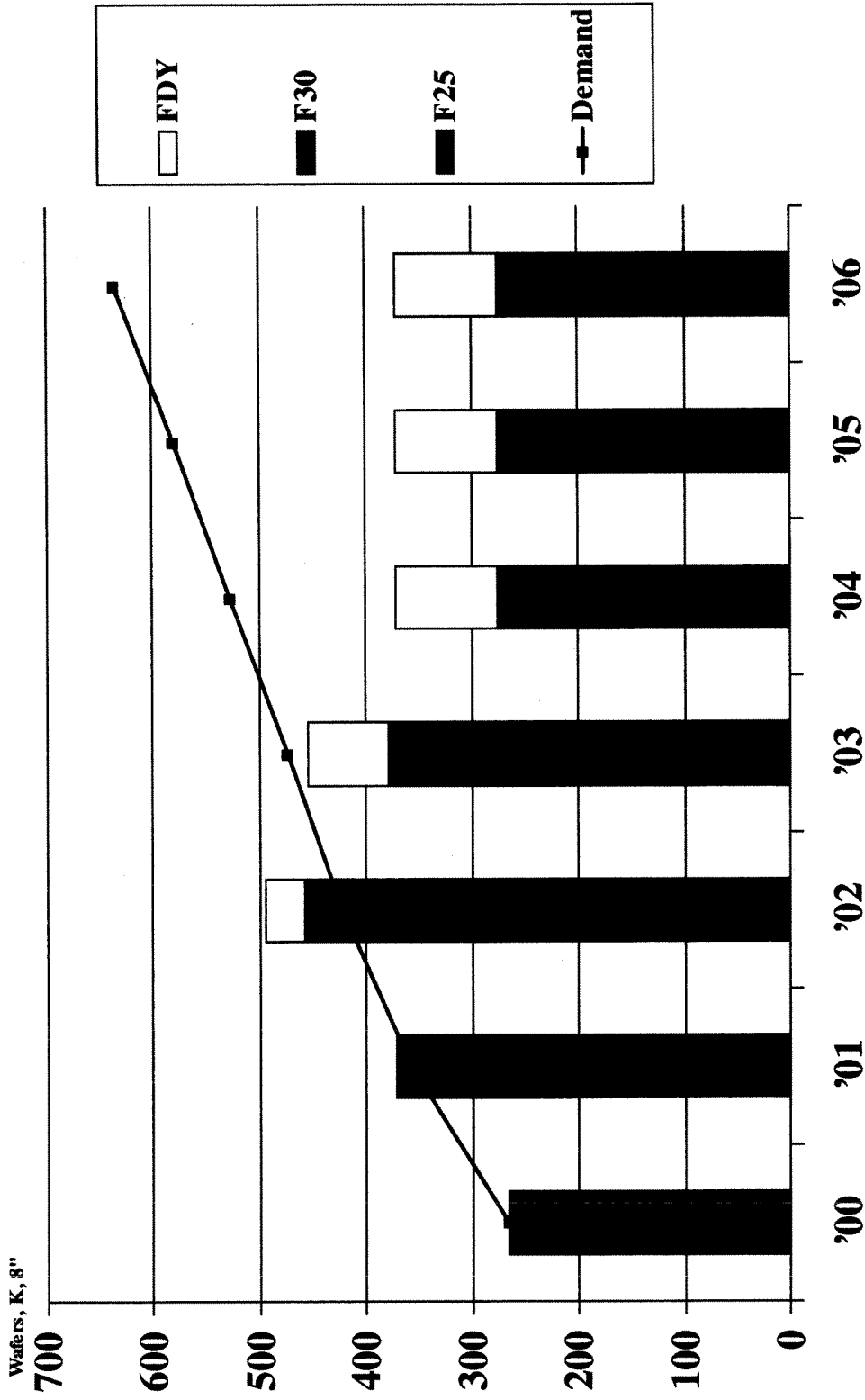
	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
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Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 does not convert to copper  
 Market share is 20%, 21%, 21%, 22%, 23% for 2001-2005.

# FAB WAFER CAPACITY VS. DEMAND



CASE 037A Nominal (F25 Aluminum, Market Share is 23%, 22%, 22%, 23% for '01 - '05)



# Case 037A Nominal

30 R6Q

Wafers Out (K)	Act		Est		30 R6Q						YR06			
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01		YR02	YR03	YR04
Capacity	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0
Fab 25, CS44	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0
Fab 25, CS50	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0
Total Fab 25	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1
Total Fab 30	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1
Total up/Emb Capacity	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	52.36	58.90	65.93	72.79
Die Demand (M)										49%	5%	12%	12%	10%
PC Processors														
Growth Yr to Yr														
Die Ships Per Water	130	126	120	136	142	145	145	148	128	145	130	130	130	130
PC Processors														
Based on Die divided by wafers														
Wafer Demand (K)	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6				
Fab 25 CS44 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	104.0	0.0	0.0
Fab 25 CS50 PC	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0
Fab 25 EPD Embedded	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	124.0	20.0	20.0
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6
Percentage of Total											8%	20%	35%	35%
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	434.1	351.7	351.7
Delta Support Processors	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	71.7	-19.0	-155.5	-208.2
8" Equivalent											31.9	-8.4	-69.1	-92.5
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	13.0	0.0	104.0	208.0	208.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000\_2 dated 8/8/00  
 Fab 25 does not convert to copper  
 Market share is 23%, 22%, 22%, 23%, 23%, for 2001-2005.