

From: taddie
Sent: Wednesday, February 16, 2000 5:25 PM
To: mgrant
Subject: Some G2

Hi Mike,

This may be old news to you, but I just talked to someone from Samsung who said that Compaq is pressing hard for Rambus support. He indicated that Compaq has made a sooner than expected technology switch (towards Rambus) based on the apparent success Dell is having. Samsung expects that in Q2 that Dell and Compaq will be their largest Rambus users.

Regards,

Tom Addie
Micron Semiconductor
e-mail: taddie@micron.com <<mailto:taddie@micron.com>>
phone: (408) 855-4016

--

From: taddie
Sent: Monday, May 22, 2000 9:20 AM
To: blauer
Subject: RE: RDRAM meeting

I'll see what I can find out.

Tom Addie
Micron Semiconductor
email: taddie@micron.com
phone: (408) 855-4016
fax: (408) 855-4044

-----Original Message-----

From: blauer
Sent: Sunday, May 21, 2000 8:23 AM
To: taddie
Subject: FW: RDRAM meeting

Tom,

Can you check with your Sammy contacts about price targets?

-----Original Message-----

From: dmorrissey

At this point Dell has told their RDRAM suppliers that they will provide to them price points that must be met to ship RDRAM systems, Dell will also provide us with these price targets. If these targets cannot be met Dell will probably change their product mix to PC133, etc

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MU00107513

From: Itumer
Sent: Tuesday, June 05, 2001 12:11 PM
To: jlin; llim; yunsong
Subject: RE: DDR Modules

No problem! We want DDR to explode into the marketplace so have actually been requesting Infineon, Samsung and Hynix to lower their DDR pricing to help it become a standard (and drive Rambus away completely). thanks

-----Original Message-----

From: jlin
Sent: Tuesday, June 05, 2001 2:35 AM
To: llim; yunsong
Cc: Itumer
Subject: RE: DDR Modules

I also heard Hynix quoted at the level Lionel indicated. Bart of MEC faxed Jack some invoices gotten from MEC's customer who just purchased some DDR DIMM at the prices at Lionel said. Just several tens pieces.

Scaryl

Jason

-----Original Message-----

From: llim
Sent: Tuesday, June 05, 2001 3:49 PM
To: yunsong
Cc: jlin
Subject: RE: DDR Modules

100 to 200pcs. Looks like they are getting aggressive with DDR as well which is good.

-----Original Message-----

From: yunsong
Sent: Tuesday, June 05, 2001 3:42 PM
To: llim
Cc: jlin
Subject: RE: DDR Modules

what sort of volume in the picture?

local module made by Sammy parts is at \$30/60 for small volume.

-----Original Message-----

From: llim
Sent: Tuesday, June 05, 2001 2:48 PM
To: yunsong
Cc: jlin
Subject: DDR Modules

Heard Hynix quoting PC2100 at \$28/\$55 for 128/256MB ?? Can you confirm.

Lionel Lim
Micron Semiconductor Asia Pte Ltd
DID :(65)488-2630
Tel:(65)488-2620 Fax:(65)287-6556
Email : llim@micron.com
http://www.micron.com

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MU00128367

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2
-9-

MU00128368

From: ckchung
To: DSKim
CC: ftabrizi@hynix.com; KunChul Suh - Hynix; Gary Swanson - Hynix
BCC:
Subject: Micron - Mike Sadler
Date: 7/3/2001 5:43:06 PM

Attachments:

SMN;

Gary Swanson told me yesterday that Mike Sadler wanted to discuss with us on the measures to stabilize the market price. Good move, right? Farhad got the same message from Mike this morning. I think your diplomacy is working. Will work with Farhad and see whether Mike can be down in San Jose in the afternoon of July 16 or in the afternoon of July 17.

Best Regards,

C. K. Chung
Memory Sales & Marketing Division
Hynix Semiconductor
Tel : 82-2-3459-3915
Fax : 82-2-3459-3990
ckchung@hynix.com <mailto:ckchung@hynix.com>
Building Value Is Our Best Defense !!!

From: ckchung
To: dskim
CC: Gary Swanson; Clint Miller; YoungSik Park; wscho; KC Suh; tnkim; Seung Lee
BCC:
Subject: HP, etc
Date: 12/12/2001 9:37:58 PM

Attachments:

Met Samsung guys over the lunch. HP related update from them.

1. Core supplier selection : According to them, Samsung didn't/couldn't agree to BPO. In the meantime, HPD invited Micron and had meeting on Monday. The two core suppliers would be Micron and Infineon. It supposed to be announced tomorrow.

2. DDR Pricing : Samsung quoted \$40 for 256MB DDR to HPD. Samsung DDR is not qualified at HPD, anyway. Micron price at \$31 range.

Gary : I need your support on Micron.
Clint, you need to check what's SS' price at Compaq. Our price will be \$38.57 for the 2nd half of December.

3. Samsung agrees to the gap based DDR pricing

KC : I was on/off for taking calls over the lunch. Other key things to add?

Best Regards,

C. K. Chung
Memory Sales & Marketing Division
Hynix Semiconductor
Tel : 408-232-8303
Mobile : 408-315-0558
ckchung@hynix.com <mailto:ckchung@hynix.com>

From: ckchung
To: Gary Swanson
CC: dskim; ftabrizi@hynix.com; SonSeok Lee; Joo Sun Choi; gmhan;
ssunchoi@hynix.com; wscho
BCC:
Subject: Fw: DDR memory prices soar pending Intel introduction
Date: 12/27/2001 1:41:01 AM

Attachments:

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Hi Gary. Intersting article on DDR involving our buddies at Micron and Samsung.
Please call them and say hello to them. We need to do some diplomacy for DDR
pricing. Let's talk.
Best Regards,

C. K. Chung
Memory Sales & Marketing Division
Hynix Semiconductor
Tel : 408-232-8303
Mobile : 408-315-0558
ckchung@hynix.com <mailto:ckchung@hynix.com>

----- Original Message -----

From: ckchung <mailto:ckchung@hynix.com>
To: ckchung@hynix.com <mailto:ckchung@hynix.com>
Sent: Thursday, December 27, 2001 6:22 PM

Subject: DDR memory prices soar pending Intel introduction

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Thursday, December 27, 2001

DDR memory prices soar pending Intel introduction

By Jack Robertson <<mailto:jroberts@cmp.com>>

Highly Confidential - Produced Subject to MDL - 1486 Protective Order

HSA:TABRIZI,F. 107518

EBN <<http://www.ebnews.com>>
(12/27/01, 12:34:51 PM EST)

The price of double-data-rate SDRAMs is almost double that of comparable density single data rate chips, as OEMs and suppliers gear up for Intel Corp.'s touted January launch of its 845D DDR chipset.

Memory vendors and analysts don't expect the premium to remain at such high levels in the first quarter as supplies increase in the market. However, a few ponder whether DDR could remain in short supply if Intel's 845D chipset launch is even more successful than anticipated.

DRAMexchange.com lists a 128-megabit 16Mx8 PC133 SDRAM at an average \$2, just under half the ASP of the comparable density DDR chip at \$3.46. Converge lists the same single-data-rate SDRAM at \$1.75 to \$1.85, also not quite half the \$3 price for comparable density DDR chip.

Price premiums also prevail for the 256-Mbit PC133, which Converge lists in the spot market at \$4, with the DDR version going for \$7.

Mike Sadler, vice president of sales for Micron Technology, told financial analysts on a recent conference call that the Intel 845D chipset launch had created more demand for DDR than originally expected among motherboard makers and OEMs gearing up for the debut.

"After this ramp-up, we may see the DDR price premium narrowing. Eventually they should come down to near-parity with single-data-rate SDRAMs, since manufacturing costs are virtually the same," he said.

Tom Quinn, vice president of marketing for Samsung Semiconductors Inc., San Jose, Calif., said the current DDR price premium "created the interesting situation where (comparable density) DDR and Direct Rambus are nearly the same price in the supply channel."

He also suspected the DDR price premium will narrow "from the bottom up" as producers shift more production into double-data-rate away from single data rate, causing SDRAM prices to rise.

If prices rise, will this reverse last year's trend of OEMs sharply increasing the memory content of PCs? Micron's Sadler thinks not. "We have never seen OEMs reduce the memory content of machines in the mainstream market. Once a larger memory size has been set, it tends to remain in the market, even if memory prices go up," he said.

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From: blauer
Sent: Thursday, January 03, 2002 11:02 AM
To: sthorsen
Subject: RE: pricing

I get the feeling they do not talk.

(408) 544-4534 office

(408) 836-0030 mobile

-----Original Message-----

From: sthorsen
Sent: Thursday, January 03, 2002 10:50 AM
To: blauer
Subject: RE: pricing

Strange, I have been talking to Tom, but would be glad to call him. Do you have his number? I lost the scrap of paper you wrote it on last time.

-----Original Message-----

From: blauer
Sent: Thursday, January 03, 2002 10:20 AM
To: sthorsen
Subject: pricing

Mike B. from Sammy called me again. Can you call him? Wanted some direction.

-----Original Message-----

From: sthorsen
Sent: Thursday, January 03, 2002 10:11 AM
To: blauer
Subject: RE: Request for increase 256Mbit x16 to FIC and Arima for NEC project

\$19'ish on 128MB SDR / \$23.50'ish on DDR.
Compaq is done, Dell shortly and the rest are falling in line.
Still some ways to go to profitability, but we are getting there.

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MU00057105

From: fredjones
Sent: Wednesday, February 13, 2002 4:13 PM
To: cgstice; sthorsen; fwaddel; lturner
Cc: blauer
Subject: RE: 64M SDRAM pricing guidelines

We will need to increase pricing on 64Meg.

H. Fredrick Jones
Manager, Worldwide Distribution Sales and Operations
Micron Semiconductor Products, Inc.
Ph: 208-368-3921 Cell/Pager: 208-890-6160

-----Original Message-----

From: cgstice
Sent: Wednesday, February 13, 2002 3:41 PM
To: sthorsen; fwaddel; lturner; fredjones
Cc: blauer
Subject: RE: 64M SDRAM pricing guidelines

FYI:
Heard from our contact at Samsung that they are not quoting anything under \$2.50, and are shooting for \$2.75 on x16 64M SDRAM. Said he is very surprised that we are as low as we are.

Craig Stice
Micron Product Marketing
(208)363-3397
(208-368-4617 fax
email: cgstice@micron.com

-----Original Message-----

From: sthorsen
Sent: Tuesday, February 12, 2002 12:58 PM
To: cgstice; fwaddel; lturner; fredjones
Cc: blauer
Subject: RE: 64M SDRAM pricing guidelines

OK with me to move the price guidelines up to \$2.50.

-----Original Message-----

From: cgstice
Sent: Tuesday, February 12, 2002 11:44 AM
To: sthorsen; fwaddel; lturner; fredjones
Cc: blauer
Subject: 64M SDRAM pricing guidelines

I wanted to suggest that we increase the pricing guidelines on the 64M SDRAM (x4, x8, x16) from the current price of \$2.00, to at least \$2.50. Spot prices have increased steadily to \$2.40, and we have heard Samsung is now quoting \$2.50. I might even suggest moving guidelines to \$2.75-\$3.00, just to test the waters.

I would also suggest, if your not already, aggressively pushing our contract pricing to the \$2.25 mark.

Your thoughts?

Craig Stice
Micron Product Marketing
(208)363-3397

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MU00136098

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From: cgstice
Sent: Thursday, February 28, 2002 7:58 AM
To: llim
Cc: lturner
Subject: RE: 64M SDRAM pricing

Good information, thanks!

Craig

-----Original Message-----
From: llim
Sent: Wednesday, February 27, 2002 8:22 PM
To: cgstice
Cc: lturner
Subject: RE: 64M SDRAM pricing

Just talked to Hynix and their volume is approx 6 to 7Mil /mth. Pricing is around the same level as Samsung. For 1Mx16 SDR their output is approx 10Mil and pricing around \$1.40 to \$1.50

-----Original Message-----
From: llim
Sent: Tuesday, February 26, 2002 4:18 PM
To: cgstice
Cc: lturner
Subject: RE: 64M SDRAM pricing

Talked to Sammy and they have started to indicate march pricing at \$3.50 but will settled between \$2.75 to \$3.10 . Currently they have no plan to ramp this and put a 5Mil/mth output. Guess the wild card for this item is from the Taiwanese folks as whether they are planning to ramp this product ??

-----Original Message-----
From: cgstice
Sent: Saturday, February 09, 2002 7:41 AM
To: llim
Subject: RE: 64M SDRAM pricing

Thanks!

-----Original Message-----
From: llim
Sent: Friday, February 08, 2002 4:39 PM
To: cgstice
Subject: RE: 64M SDRAM pricing

Will check after the Chinese New Year since Asia pratically shut down next week.

-----Original Message-----
From: cgstice
Sent: Saturday, February 09, 2002 7:35 AM
To: llim
Subject: RE: 64M SDRAM pricing

Have you heard anything from Hynix, and what price they are quoting?

-----Original Message-----
From: llim
Sent: Friday, February 08, 2002 4:27 PM

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MU00136390

To: cgstice
Subject: RE: 64M SDRAM pricing

Wow number is too small. We are seeing more demand coming with some of the Netcom customers starting to build products as well DVD.

-----Original Message-----

From: cgstice
Sent: Saturday, February 09, 2002 7:24 AM
To: llim
Subject: RE: 64M SDRAM pricing

Yes, we are increasing our wafer starts for Y84B. Right now we are at about 1mil/wk units out (x4,x8,x16), but this will be going down steadily through March to less than 400k/wk. We probably will not see the new wafer until the first - mid part of April.

-----Original Message-----

From: llim
Sent: Friday, February 08, 2002 4:17 PM
To: cgstice
Subject: RE: 64M SDRAM pricing

Are we starting more wafers on this part and what's the output now ?

-----Original Message-----

From: cgstice
Sent: Saturday, February 09, 2002 7:16 AM
To: llim; yunsong; jlin
Subject: RE: 64M SDRAM pricing

If you hear any further news, Please let me know.

Kind regards,
Craig

-----Original Message-----

From: llim
Sent: Friday, February 08, 2002 4:09 PM
To: cgstice; yunsong; jlin
Subject: RE: 64M SDRAM pricing

Think every supplier is short of this 4x16 and has become the hottest part in the market especially brokers are looking for this. In spot, I hear it went to a high of \$2.75 but for generally OEM pricing it is around the \$2 to \$2.20 mark. While high volume purchase customers are at \$1.75 average. Believed this continues to be tight for at least the next 2months. Heard Samsung indicating at \$2.50 for March???

-----Original Message-----

From: cgstice
Sent: Saturday, February 09, 2002 6:09 AM
To: yunsong, jlin; llim
Subject: 64M SDRAM pricing
Importance: High

Hello,
I am curious what you are hearing our competitors are quoting for price on 64M SDRAM (x4, x8, x16). Also if you have any ideas to their inventory levels or leadtimes, I'd be interested in knowing.

Thank you,

2

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MU00136391

Craig Stice
Micron Product Marketing
(208)363-3397
(208-368-4617 fax
email: cgstice@micron.com

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MU00136392

From: blauer
Sent: Monday, January 21, 2002 7:53 AM
To: fwaddel; sthorsen
Subject: RE: NEC and DDR

I agree with Fred's price statement, BUT I wanted to alert you to a scary trend that I am seeing. 850 chip set orders (RDRAM) have been increasing at Intel. Dell showed us the same thing basically with a flat RDRAM TAM. The price premium of DDR over SDR is not good for us in the short term.

-----Original Message-----

From: fwaddel
Sent: Monday, January 21, 2002 7:50 AM
To: kradford; sthorsen; blauer
Cc: hyamanoue; jschram
Subject: RE: NEC and DDR

I'll let Joe and Bill address the difficulty of build question.]

As for the DDR pricing premium, we are projecting (for forecasting purposes) that DDR and SDR will narrow in pricing differential in the next two quarters and that we will likely see the DDR premium go away in that timeframe. But, pricing for both DDR and SDR can only be determined by the market, not by Micron, thus we can not give any pricing premium guarantee at this time just as we can't guarantee that overall memory pricing won't exceed such and such a number in the future either.

FW

-----Original Message-----

From: kradford
Sent: Monday, January 21, 2002 12:23 AM
To: sthorsen; blauer; fwaddel
Cc: hyamanoue; jschram
Subject: NEC and DDR

One week ago, NEC had plans for 50% of their memory requirements in FQ1 April - June, to be DDR based. After talking to their other suppliers, they have revised the mix to 32% DDR/68% SDR. Other than Samsung, the other suppliers claim that support of 256MB DDR SODIMMs will be very difficult due to 16Mx16 output.

NB

36% 256MB DDR SODIMMs -----> 18%
20% 128/256MB SDR SODIMMs -----> 38%

DT

14% 128/256/512MB DDR DIMMs
30% 128/256/512MB SDR DIMMs

Couple of questions that I need responses on by Tuesday night.

1. Is 256Mb x16 DDR also difficult for us to support during this timeframe? Are there any issues regarding x8 vs x16? Other suppliers say x16 is very difficult.
2. Another reason in changing their mix plan is due to DDR premiums being 20 - 30%. I would think that we will see these premiums coming down a bit as if we see the OEMs backing off of their DDR requirements due to price. Any speculation as to where premiums will be in 2Q? NEC is requesting a premium guarantee from us in which we will say the premium will not be higher than 5-10%.

Thanks!

From: msadler
Sent: Wednesday, January 23, 2002 8:58 AM
To: blauer; sthorsen; dmorrissey
Subject: RE: Dell qTr

Interesting and I certainly interpret it as a threat, probably one that they can follow through on if the price disparity continues. (To really pack some punch, however, they should have showed an RDRAM revival somehow tied to DDR price premiums). I think over a relatively short period of time, say within next couple of months, the situation will play out as you suggest as the industry DDR supply starts to outstrip demand. To increase the probability of this and perhaps pull in the timeframe, some marketing re-education on the virtues of PC133/DDR price parity or very narrow premiums for the rest of the DRAM supply-side is probably in order. Without being specific to actual pricing I believe this is totally above board. Bill, do you think this is a good idea and, if so, would you take on this initiative?

-----Original Message-----

From: blauer
Sent: Wednesday, January 23, 2002 8:38 AM
To: sthorsen; msadler; dmorrissey
Subject: Dell qTr

Clearly this slide is a threat of some kind, maybe of our own making. I think it is imperative that we close the DDR/SDR price gap. I'd recommend lifting the SDR price to do it.

<< OLE Object: Microsoft PowerPoint Slide >>

Bill Lauer
Office: 208-368-3802
Mobile: 208-8670018
blauer@micron.com

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- 23 -

MU00057314

From: ckchung
To: Gary Whittredge
CC:
BCC:
Subject: Fw: Hynix Pricing Update
Date: 3/1/2002 12:53:48 AM

Attachments:

We are going to stay firm or go by 5 cents.....\$41.95.....ck

----- Original Message -----

From: ckchung <ckchung@hynix.com>
To: dskim <ds.kim@hynix.com>; jgnam <jeonggyun.nam@hynix.com>
Cc: <ssunchoi@hynix.com>; wscho <wonsang.cho@hynix.com>; seung.lee
<seunglee@us.hynix.com>
Sent: Friday, March 01, 2002 5:52 PM
Subject: Fw: Hynix Pricing Update

> One thing that may catch your eyes would be the DDR pricing in parity
with Sync at \$42. This DDR price must be from Micron. According to
Young, HPD is using mainly SiS chipsets for DDR system. Their weak
demand in is from seasonality, not from chipset shortage.

>

> Intentionally leaked this information to my buddy at S and asked them
to hold tight. They will stay firm at \$42 for both Sync and DDR. If they
have to reduce DDR pricing, they will go by 5 cents.....

>

> Best Regards,

>

> C. K. Chung
> Memory Sales & Marketing Division
> Hynix Semiconductor
> Tel : 408-232-8303
> Mobile : 408-315-0558
> ckchung@hynix.com
> ckchung@us.hynix.com
> ----- Original Message -----

> From: YoungSik Park <yspark@us.hynix.com>

> To: Ip, Catherine (E-mail) <catherine_ip@hp.com>;

<orlando_lopez@hp.com>; <marcos_fernandez@hp.com>; JEAN-GHISLAIN
NEVEUX

<jean-ghislain_neveux@hp.com>; <wanda_torres@hp.com>;

<clay_franklin@hp.com>; <cherry_borillo@hp.com>;

<hiroshi_fujigami@hp.com>; <doris_fischer@hp.com>; BRYAN BRAUN

<bryan_braun@hp.com>; <jmarshall@hp.com>

> Cc: Sandra Vrscaj <avrscaj@us.hynix.com>; Clint Miller
<cmiller@us.hynix.com>; <eric.maillart@eu.hynix.com>;
<kjwa@eu.hynix.com>; <sanglee@hynix.com>; <melody@hynix.com>;
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> Sent: Saturday, March 02, 2002 9:49 AM

> Subject: Hynix Pricing Update

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>>> Hynix Semiconductor provides Hewlett-Packard with price change as
follow.

>>> Effective Mar. 4, 2002.

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>>> 16Mx64 SDR DIMM U\$42.00

>>> 32Mx64 SDR DIMM U\$84.00

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>>> 16Mx64 DDR DIMM U\$42.00

>>> 32Mx64 DDR DIMM U\$84.00

>>> 64Mx64 DDR DIMM U\$168.00

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>>> 16Mx64 SDR SO-DIMM U\$42.00

>>> 32Mx64 SDR SO-DIMM U\$90.00

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>>> Best Regards,

>>>

>>> Young Park

>>> HP WW Account Manager

>>> Hynix Semiconductor

>>> yspark@us.hynix.com

>>> 408-232-8357

>>>

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