



## AMD Eclipses Intel in US Retail Market

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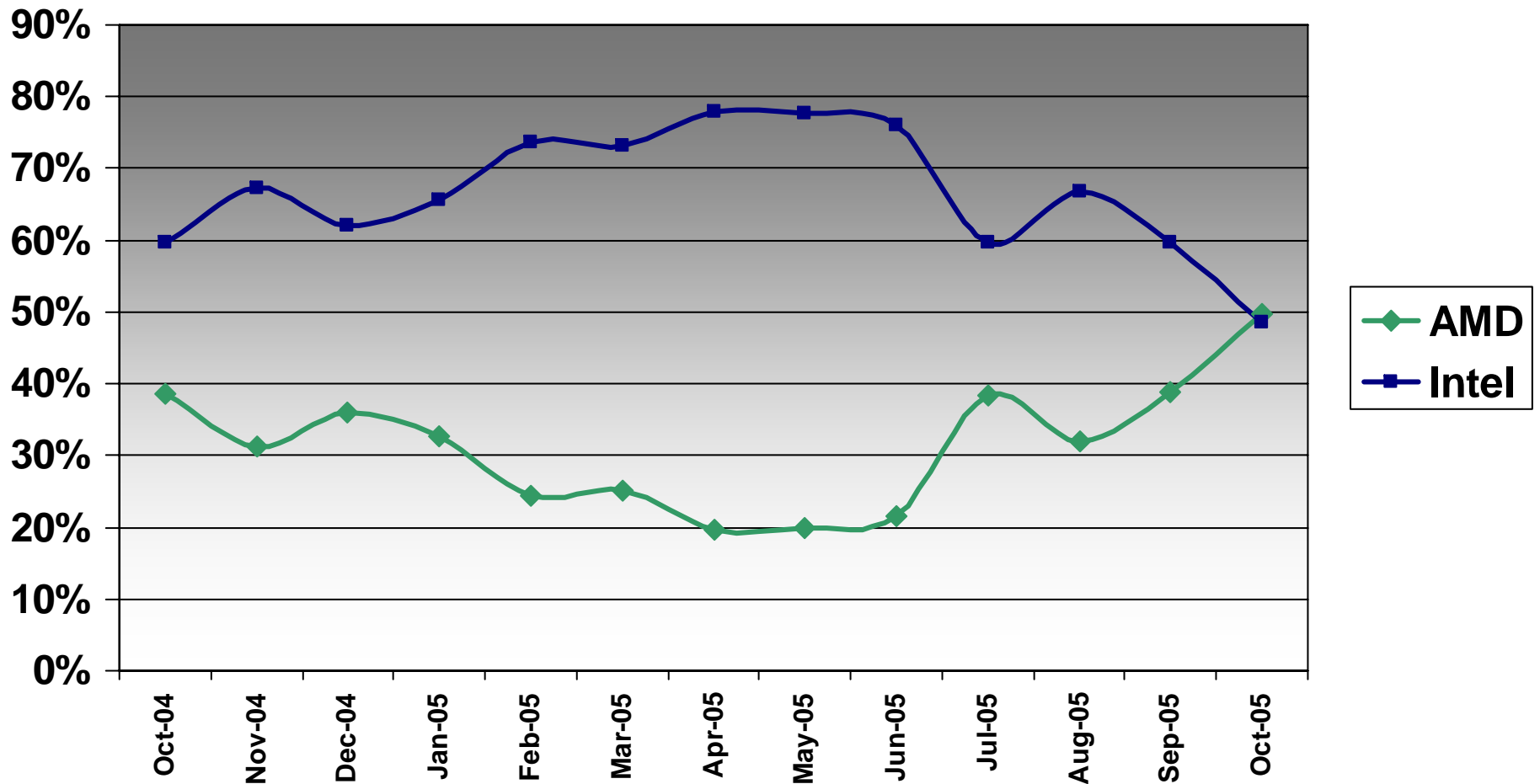
**Matt Sargent**

Director of Research

November, 2005

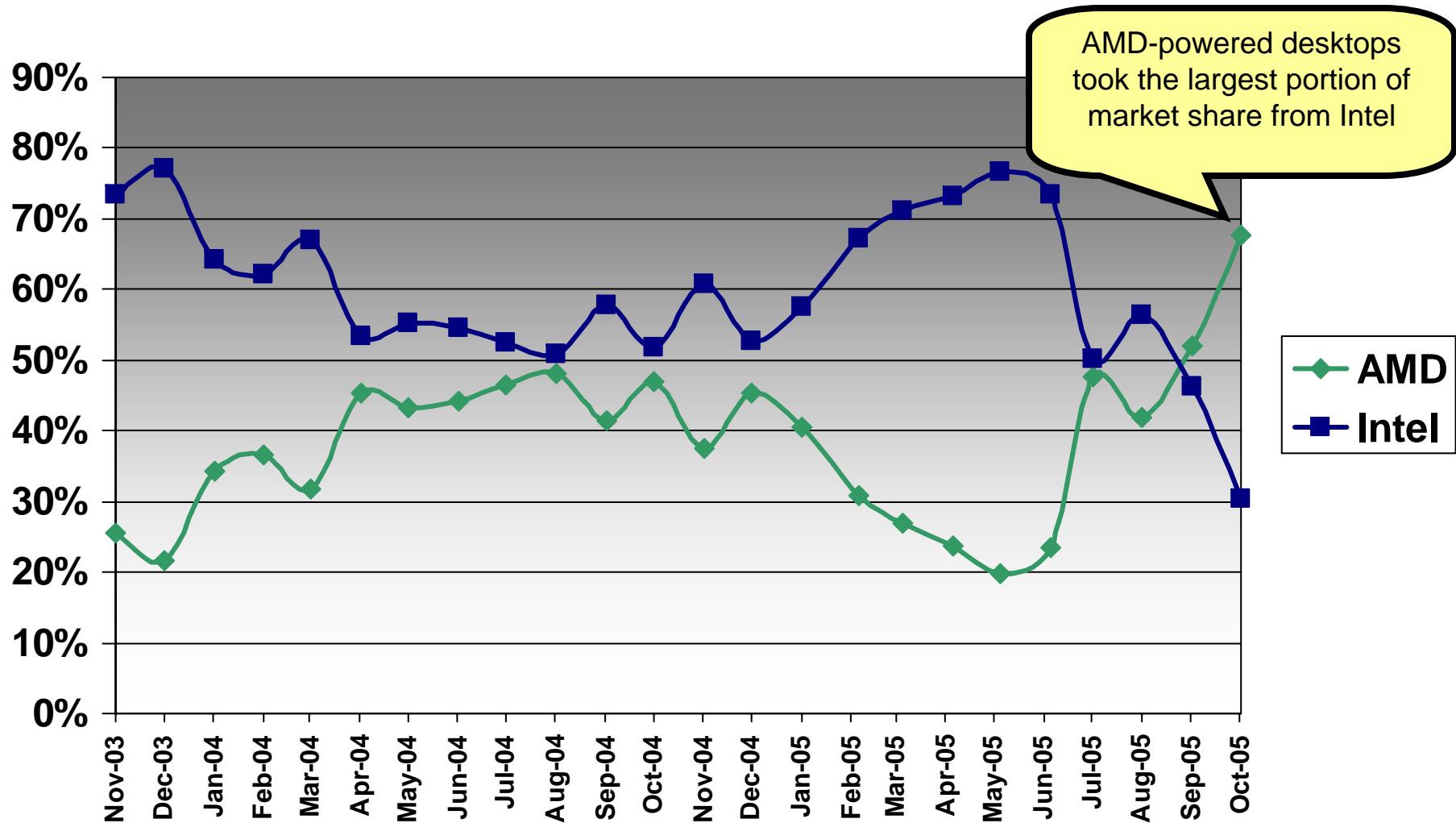
# AMD Edges Intel in Oct Retail PC Sales

Share of Retail PCs (Desktop and Notebook) Units Sold by CPU Manuf.



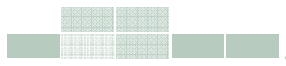
# July Represents Huge Turn Around in Desktops for AMD

Share of Retail Desktop Units Sold by CPU Manuf.



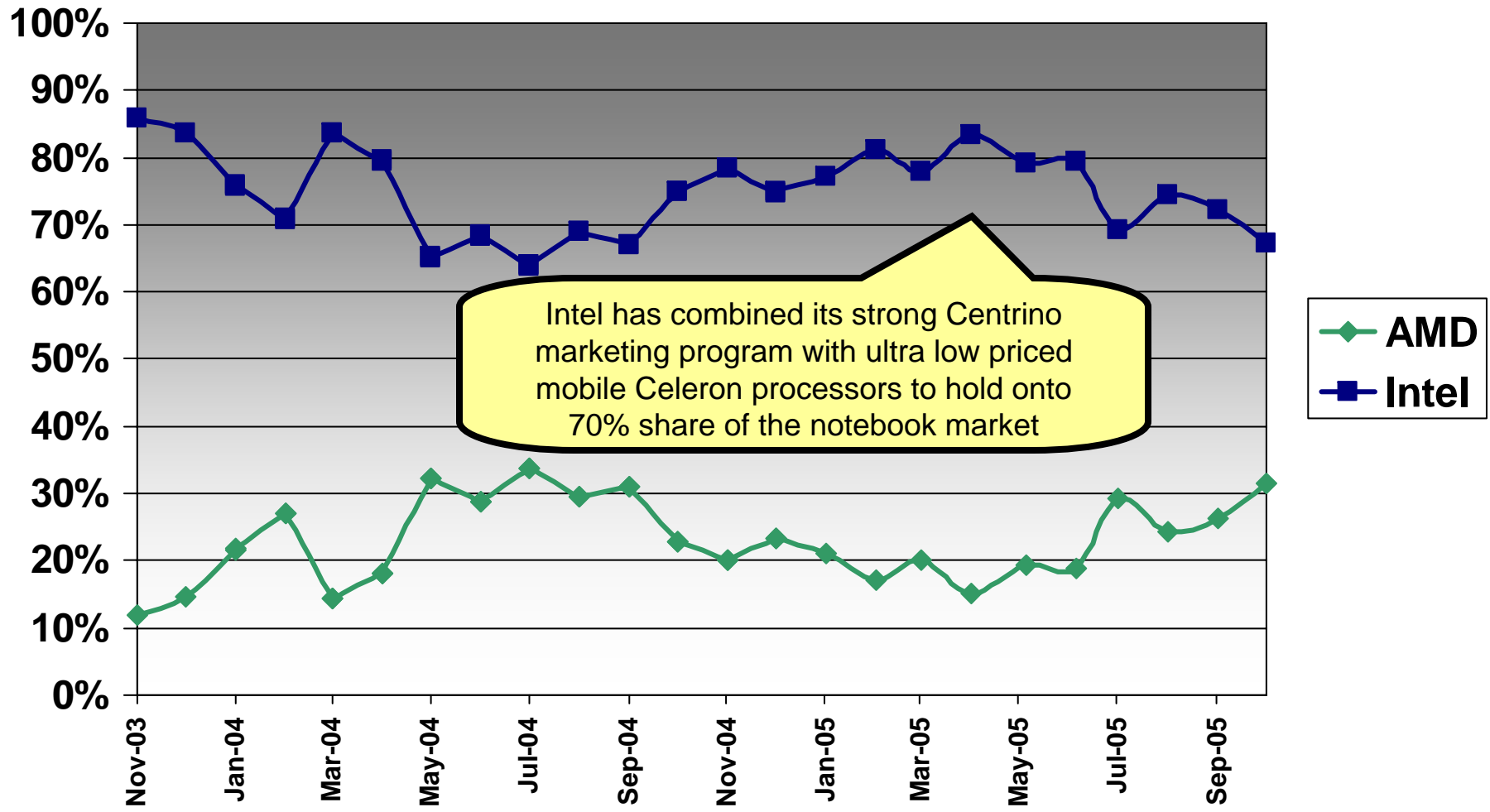
AMD-powered desktops took the largest portion of market share from Intel

◆ AMD  
■ Intel



# Intel Still Owns Lion's Share of Notebooks

Share of Retail Notebook Units Sold by CPU Manuf.

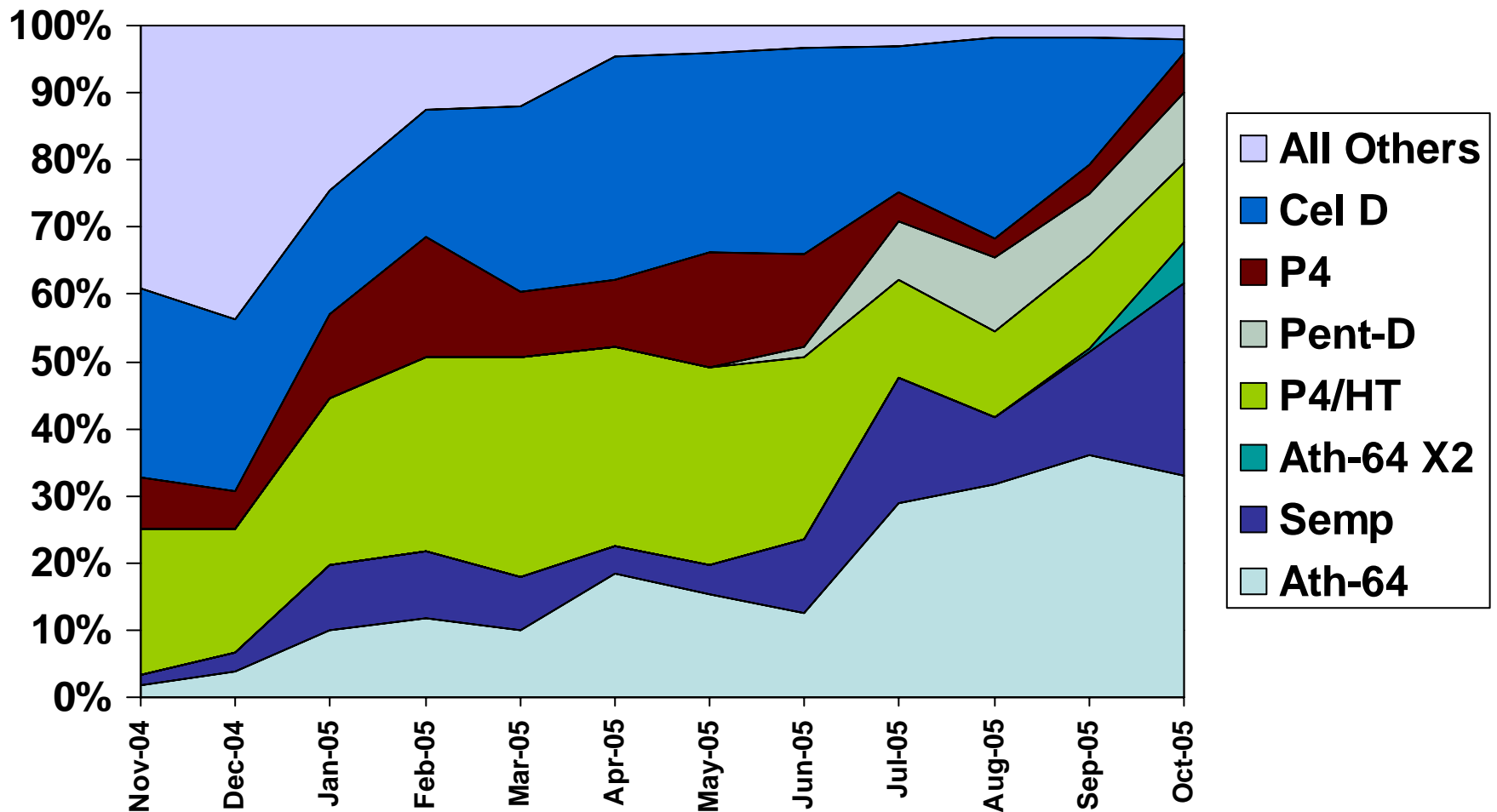


Intel has combined its strong Centrino marketing program with ultra low priced mobile Celeron processors to hold onto 70% share of the notebook market

◆ AMD  
■ Intel

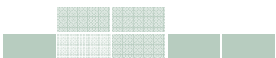
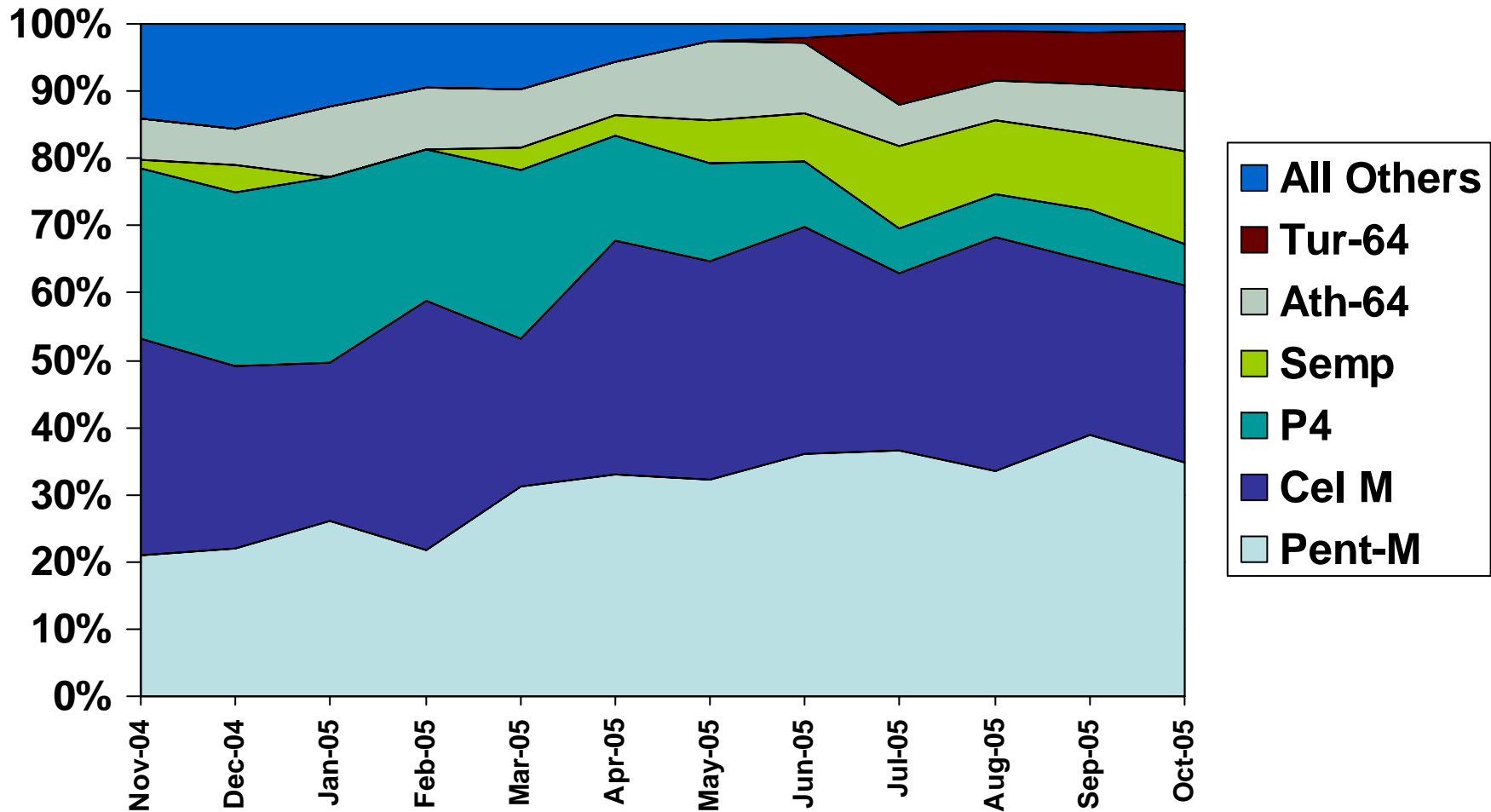
# A64 and Sempron Have Powered AMD's Success in Desktops

Share of Retail Desktop Units Sold by CPU Type



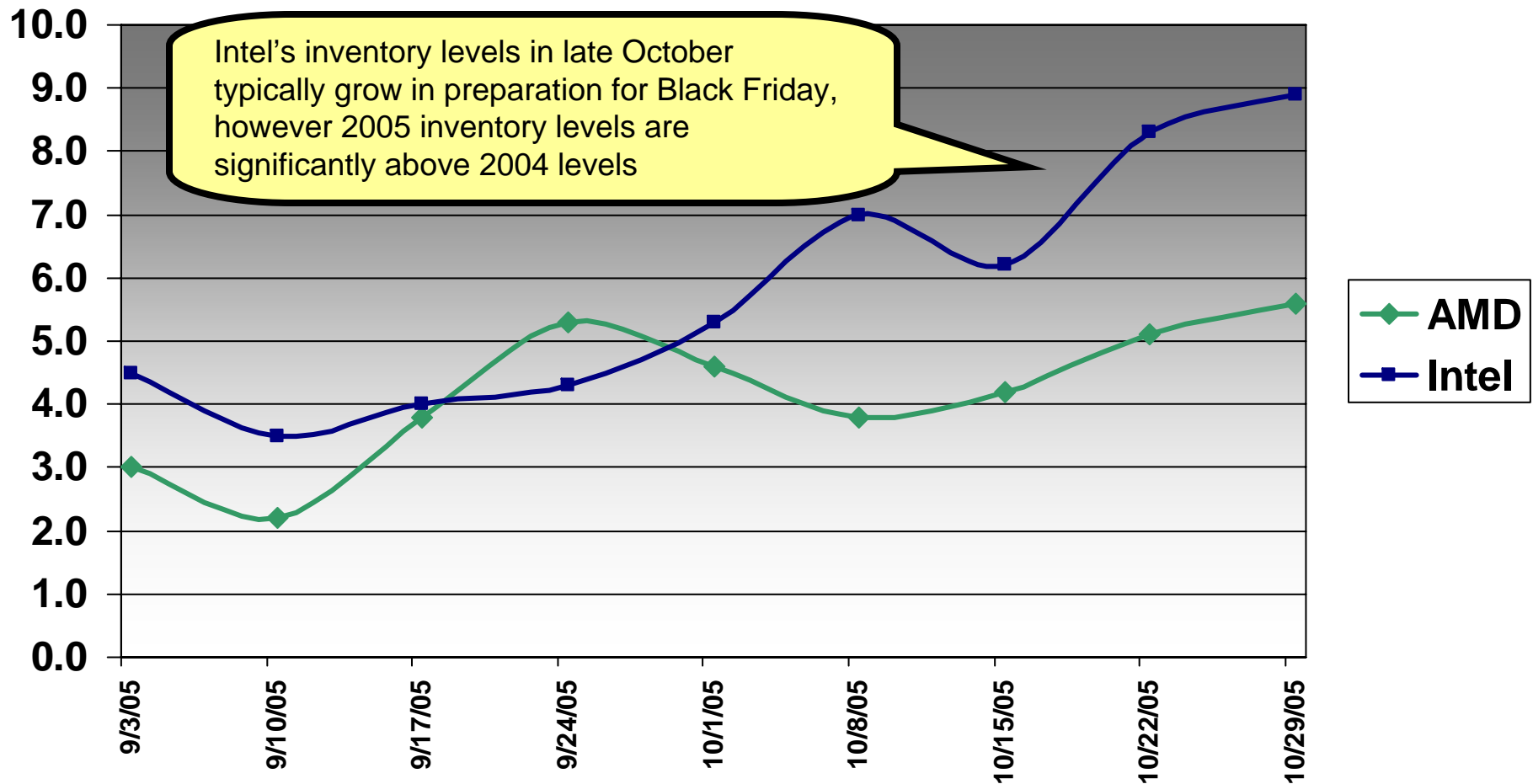
# Pent-M (Centrino) and Celeron M Have Powered Intel's Continued Dominance of Notebooks

Share of Retail Notebook Units Sold by CPU Type



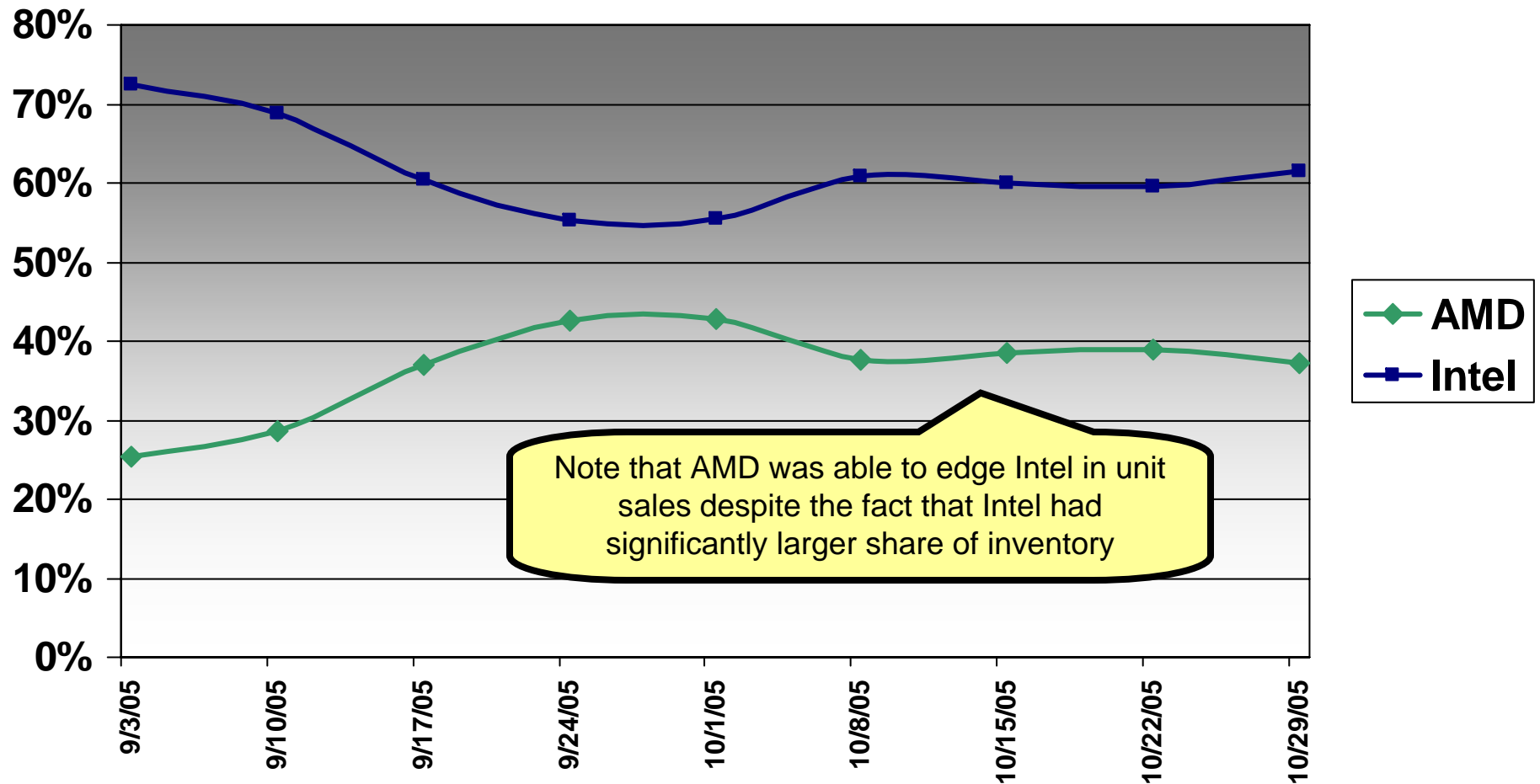
# Are Intel's Inventory Issues Affecting Retail?

Weeks of Retail PCs (Desktop and Notebook) Inventory by CPU Manuf.



# AMD succeeds with significantly lower inventory levels

Share of Retail PCs (Desktop and Notebook) Inventory by CPU Manuf.



# Synopsis

## Desktops

AMD captured US Retail lead in October thanks to AMD's dominance in desktops and the fact that desktops rebounded in October.

## Black Friday

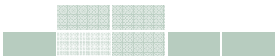
AMD's leadership position will be challenged come Black Friday when Intel will aggressively go after the "value" customer with \$399 notebooks.

## Overall Consumer Market

Intel still leads in the overall US consumer market due to Dell's 100% use of Intel. Without Dell, AMD is unlikely to take this leadership position from Intel.

## Why Is AMD's Leadership Position in Retail Important?

The October win for AMD within retail proves that AMD can compete head to head with Intel when given the opportunity. Intel leads the overall US market not due to customer choice, but because AMD is not an option from several OEMs (Dell, Toshiba, Sony, Lenovo, etc.). This win may cause these OEMs to consider AMD as they fight for a larger share of the consumer market.



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