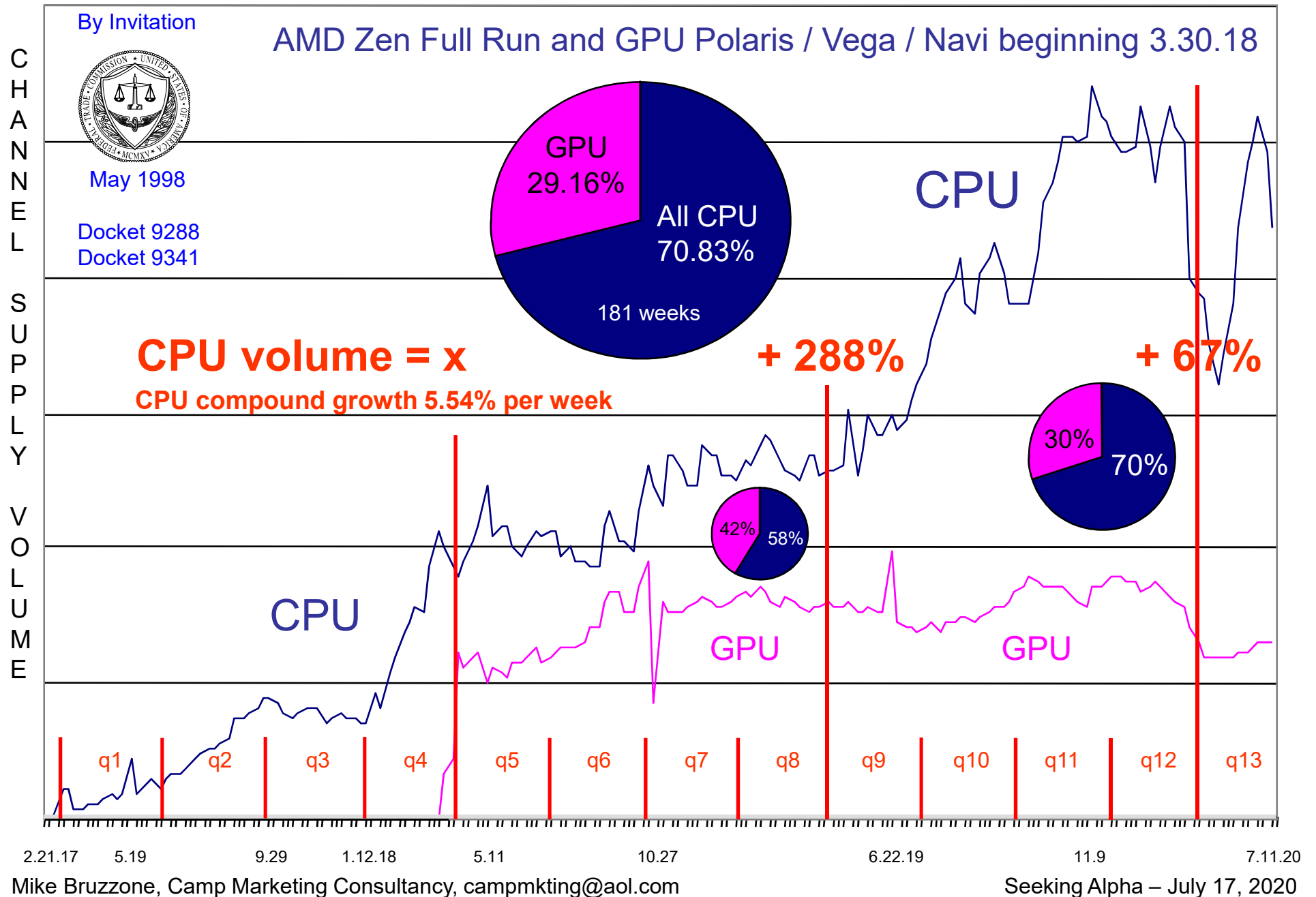
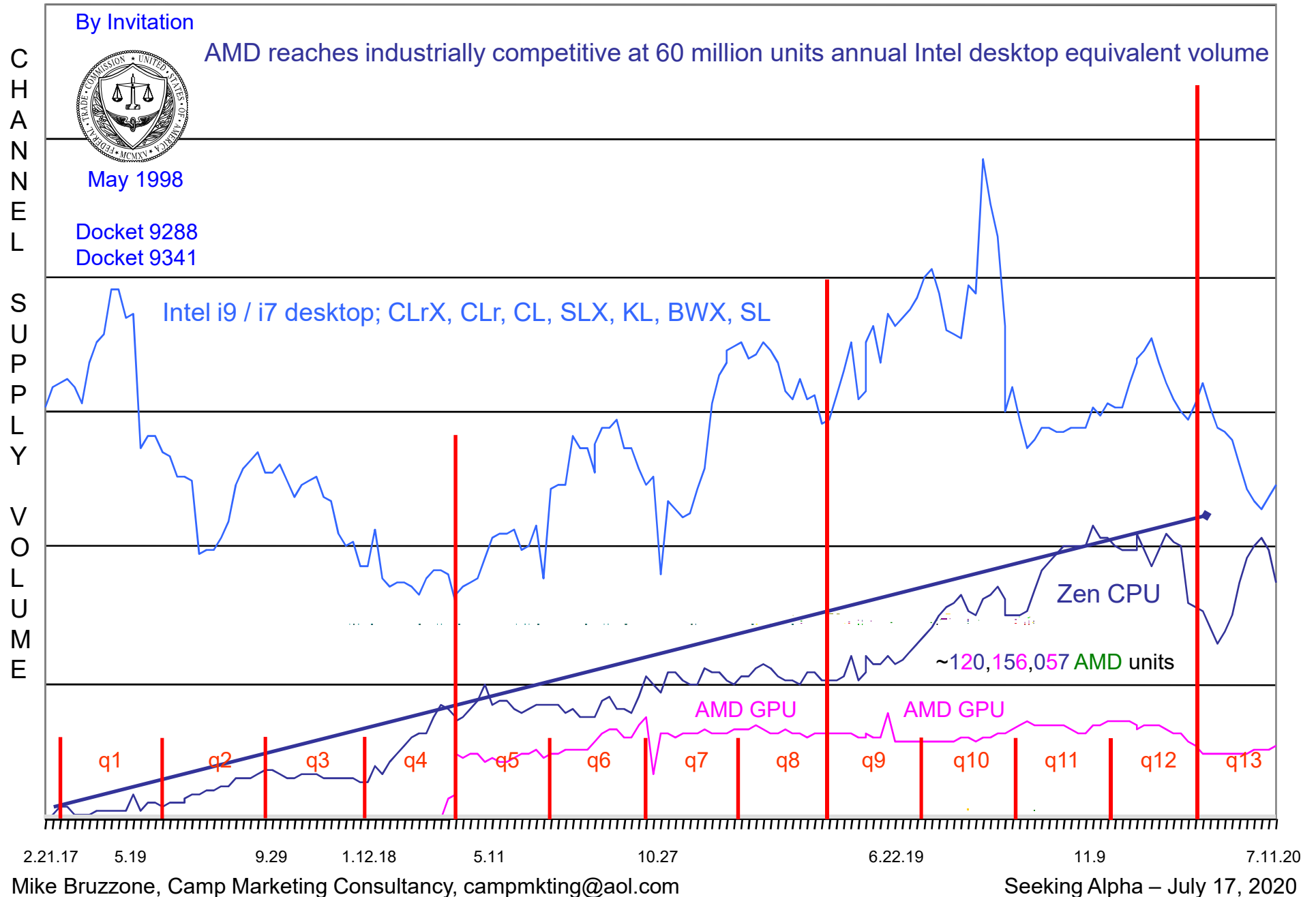


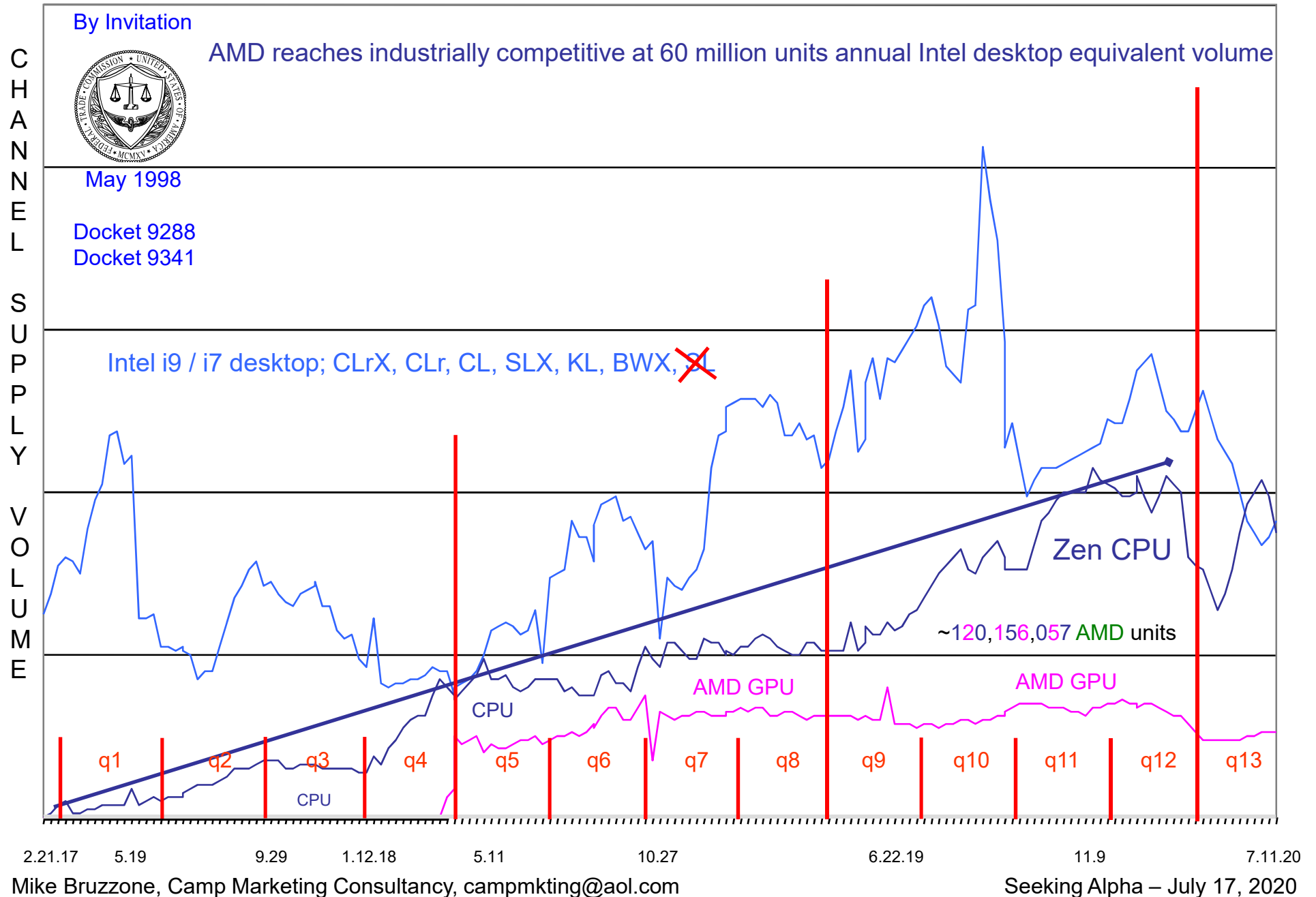
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



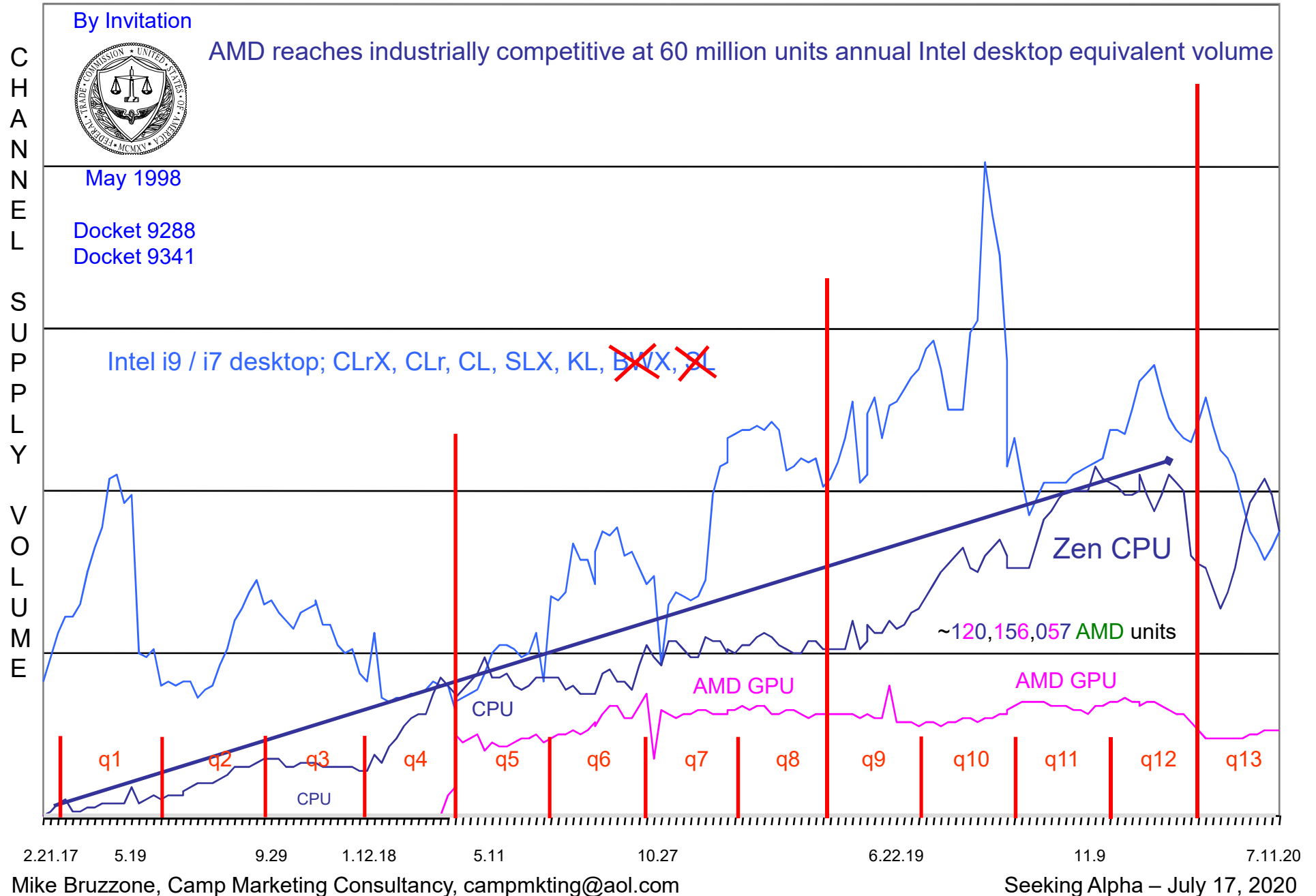
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



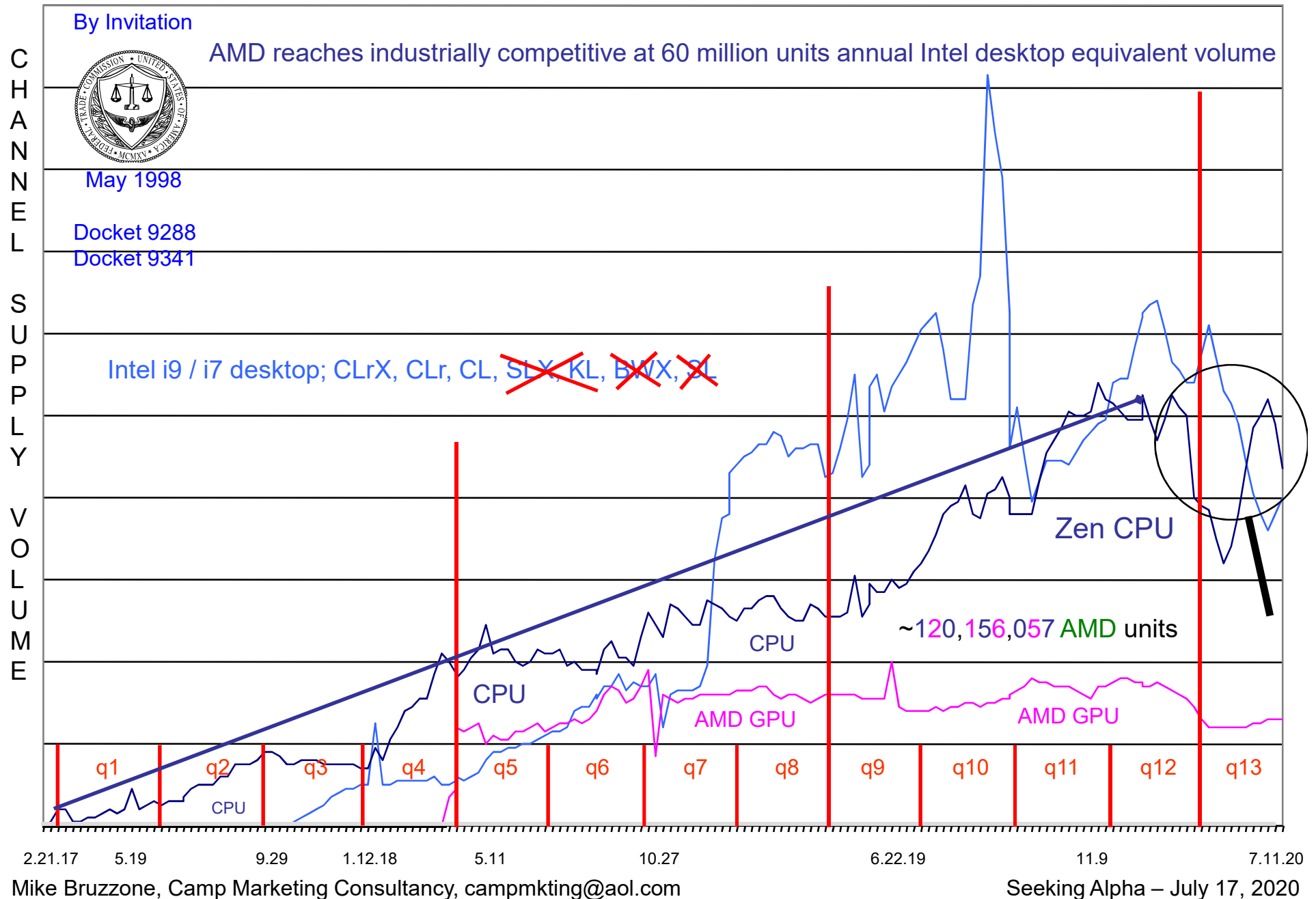
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



CHANNEL SUPPLY VOLUME

Ryzen 3xxx_desktop

Docket 9288

Docket 9341

Ryzen 1xxx_ desktop

Ryzen 3xxx_

Ryzen

Ryzen 2xxx_desktop

TR 19x0

Ryzen

Ryzen 2xxx_desktop

Ryzen 1xxx_

Ryzen

TR 19xx_

1

TR 29xx

xxx_

R 2xxx G/E APU



bles

c Naples

The graph shows two data series over time. The x-axis represents time with markers for 10, 20, 30, 40, 50, 60, 70, 80, 90, and 100. The y-axis represents a value from 0 to 100. The series 'R 3xxx G/E' (blue line) starts at approximately 10 at time 10, rises to about 20 at time 20, then more steeply to about 60 at time 40, and continues to rise to approximately 85 at time 100. The series 'AVI' (yellow line) starts at approximately 85 at time 10, remains relatively flat until time 20, then drops sharply to about 20 at time 30, and continues to decline to approximately 10 at time 100.

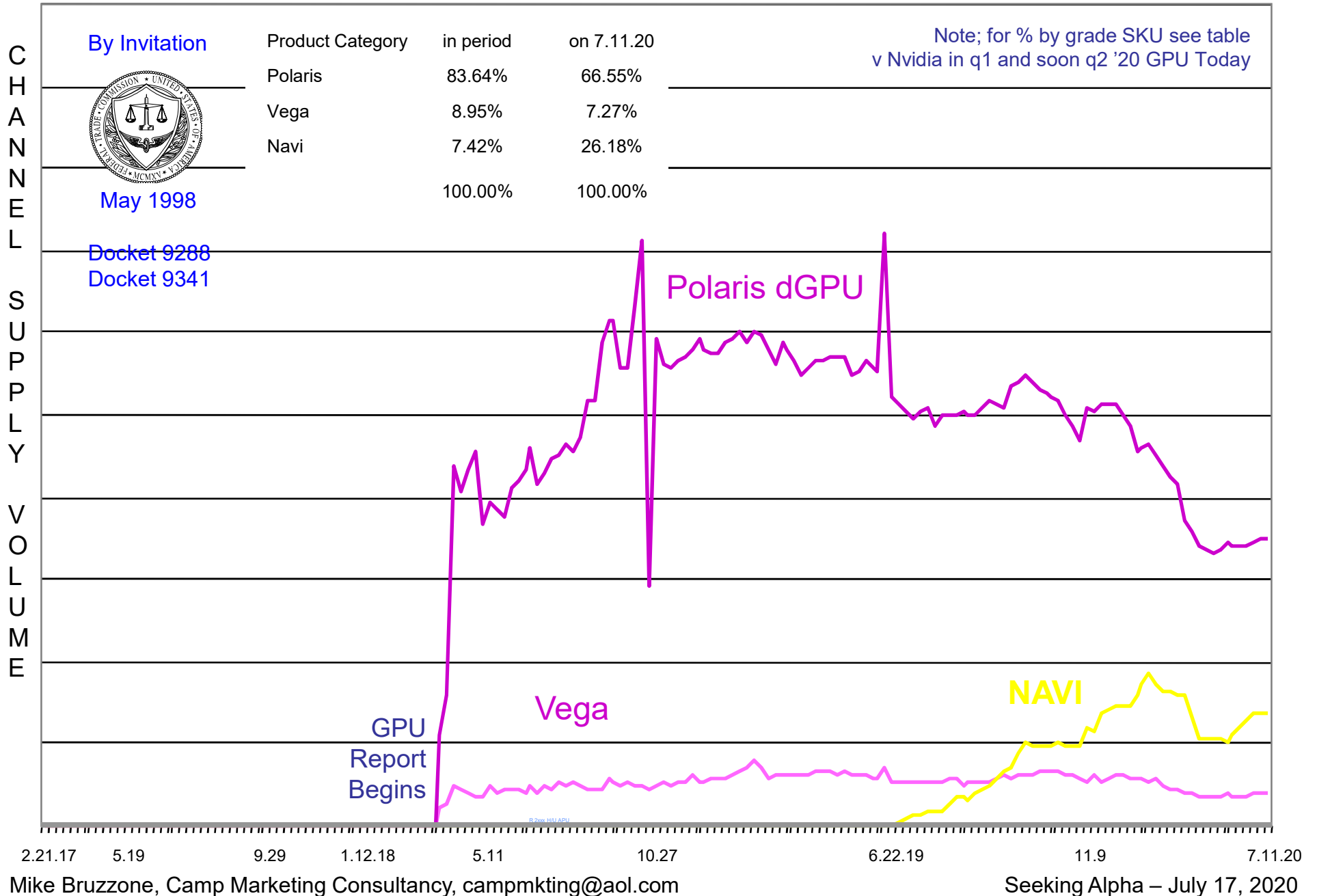
Epyc Naples

TR 2

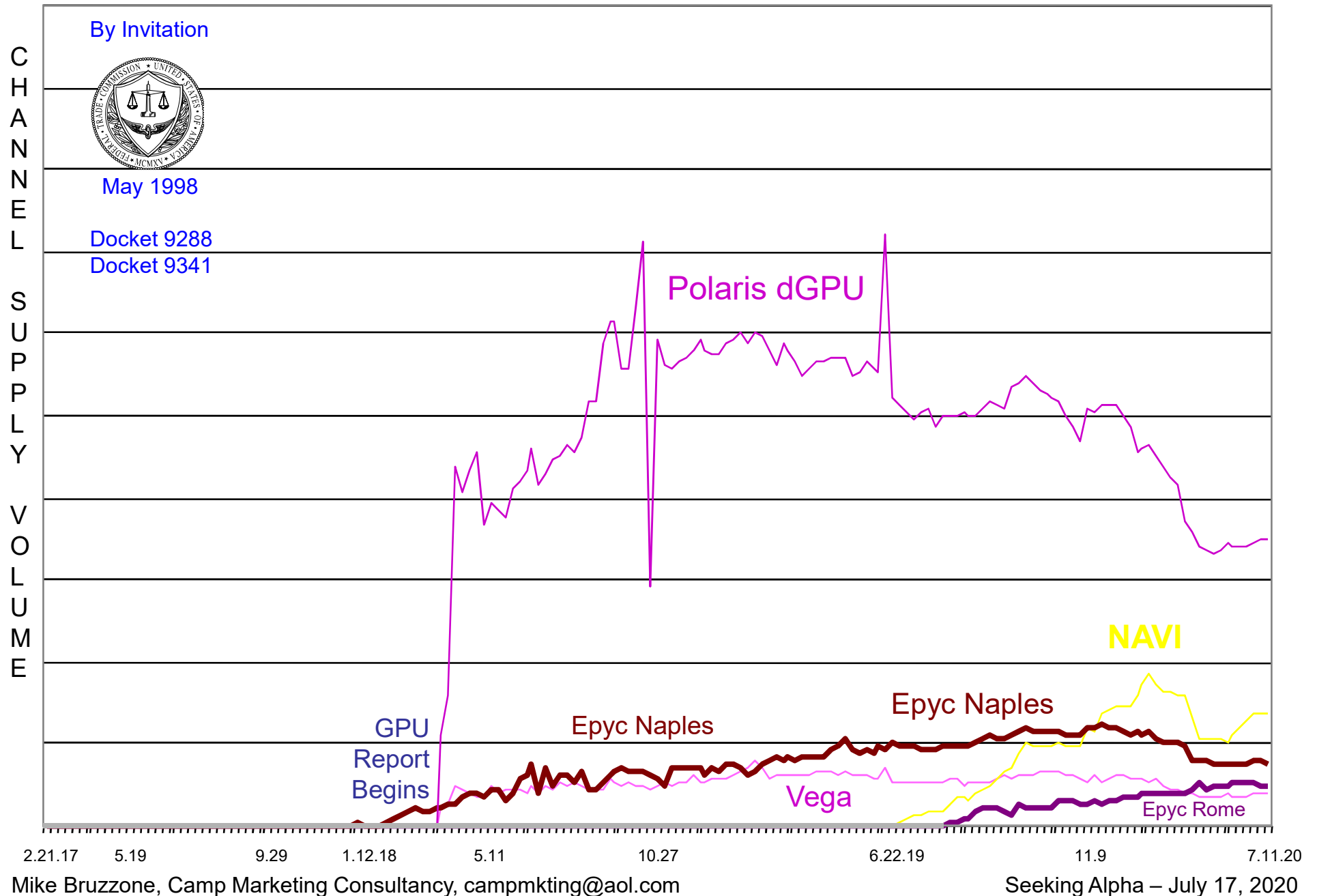


7.11.20

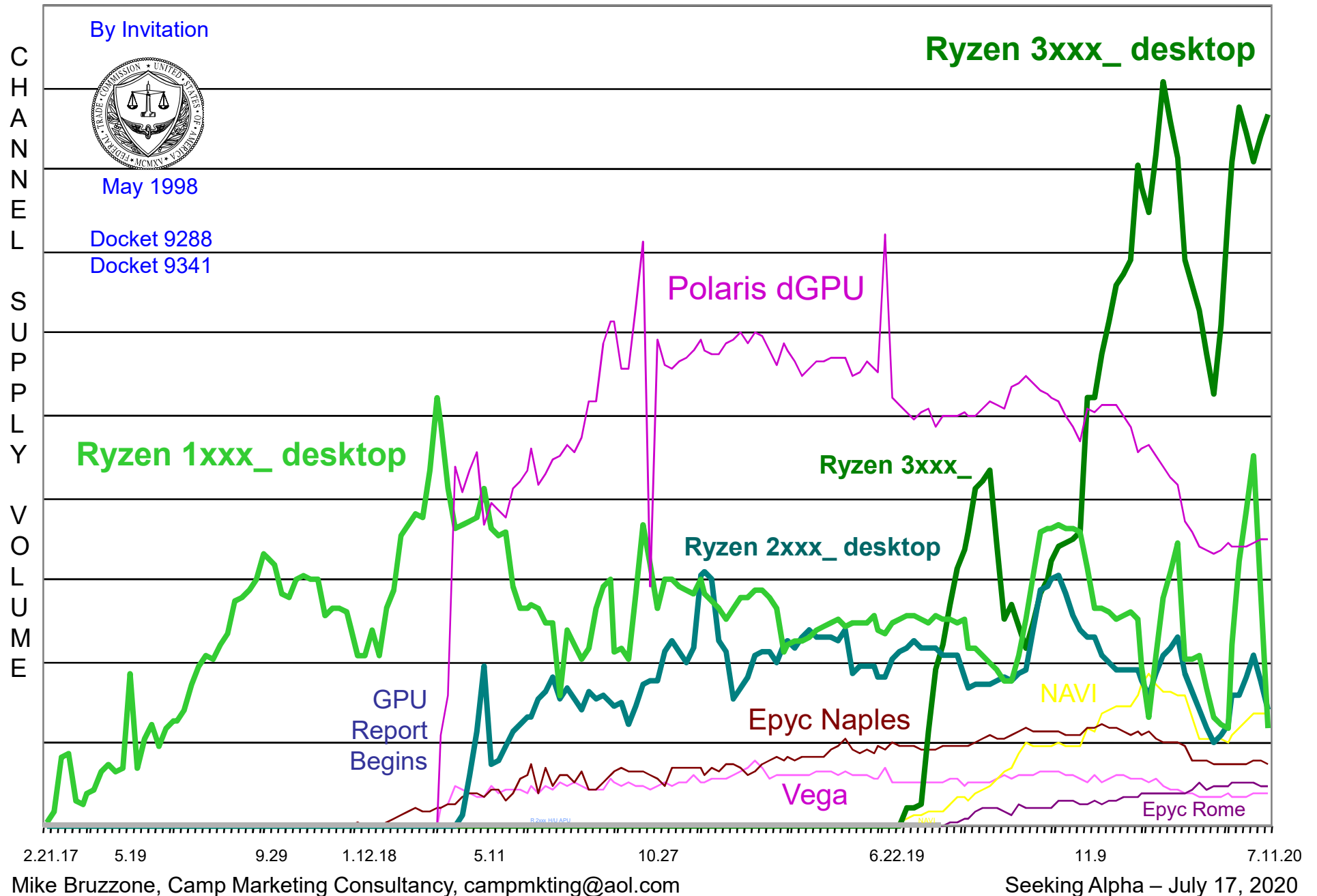
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



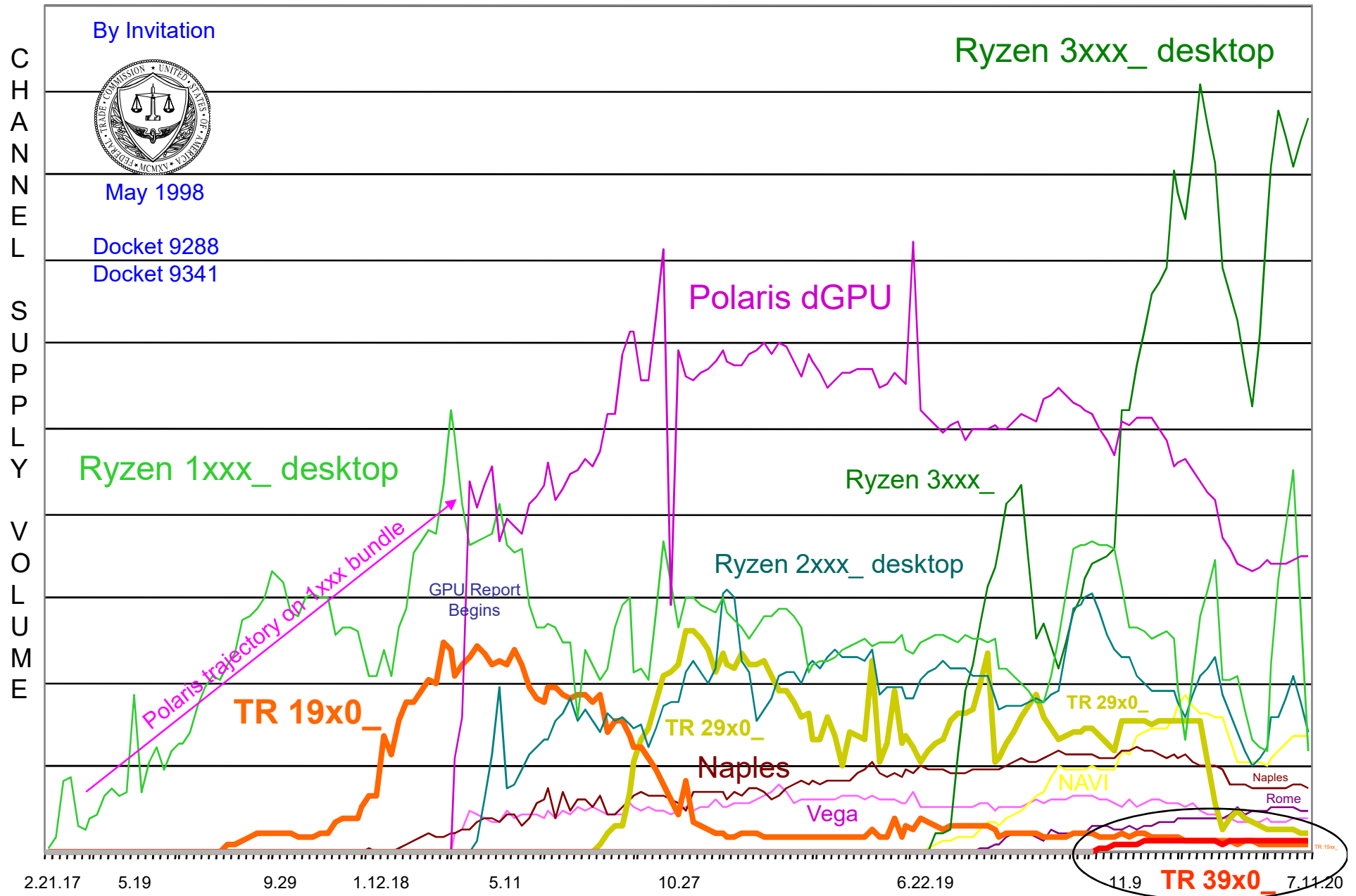
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



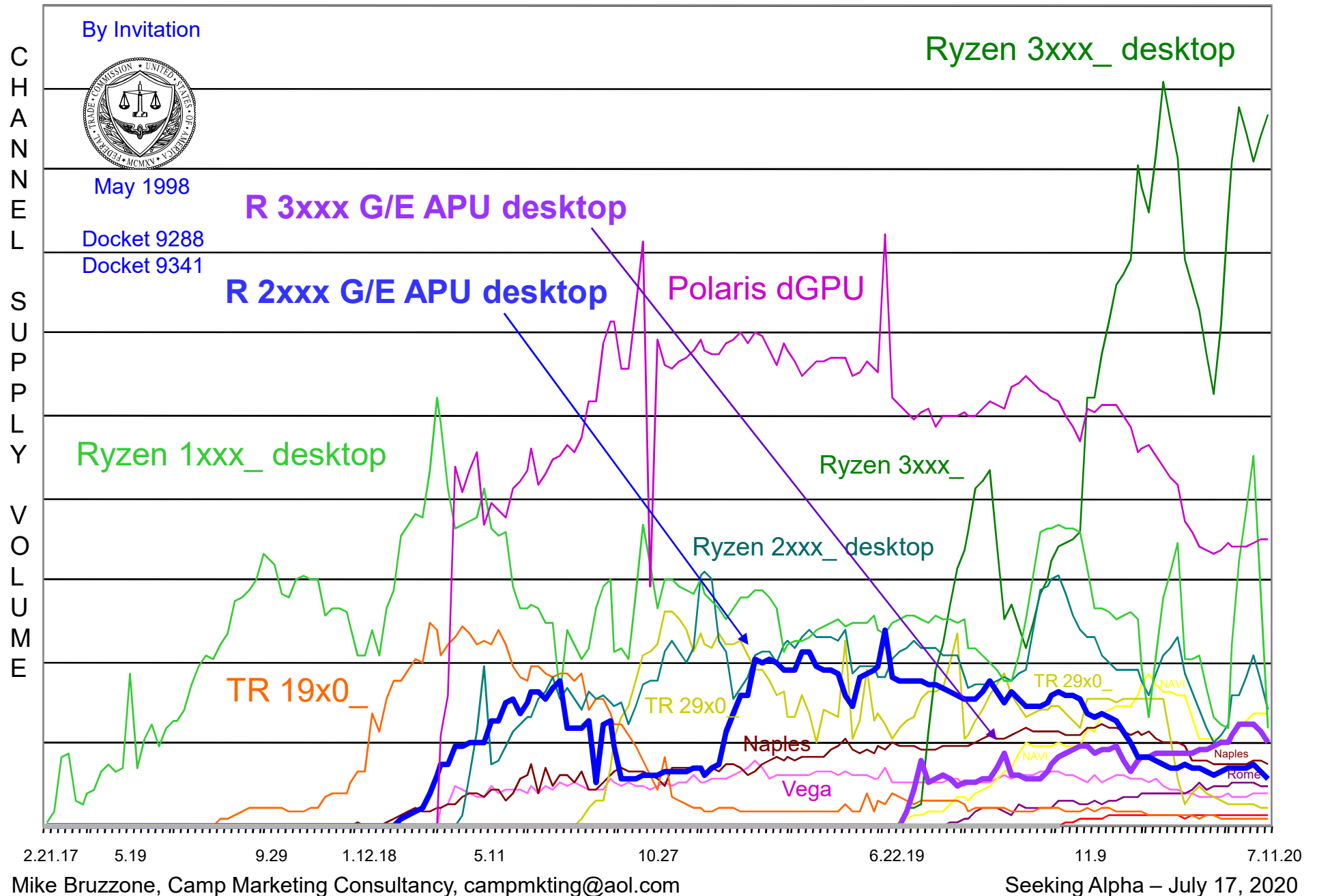
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



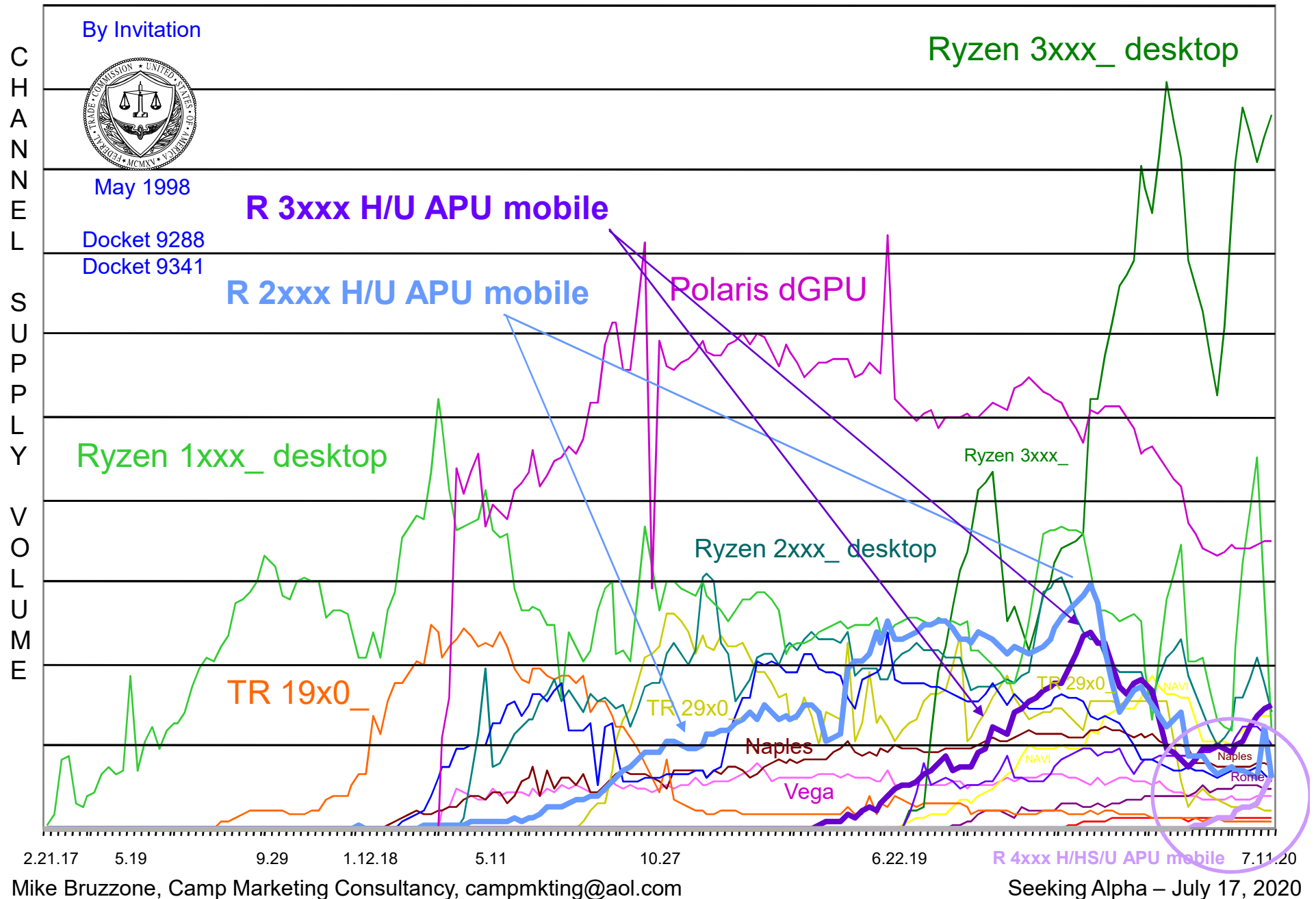
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



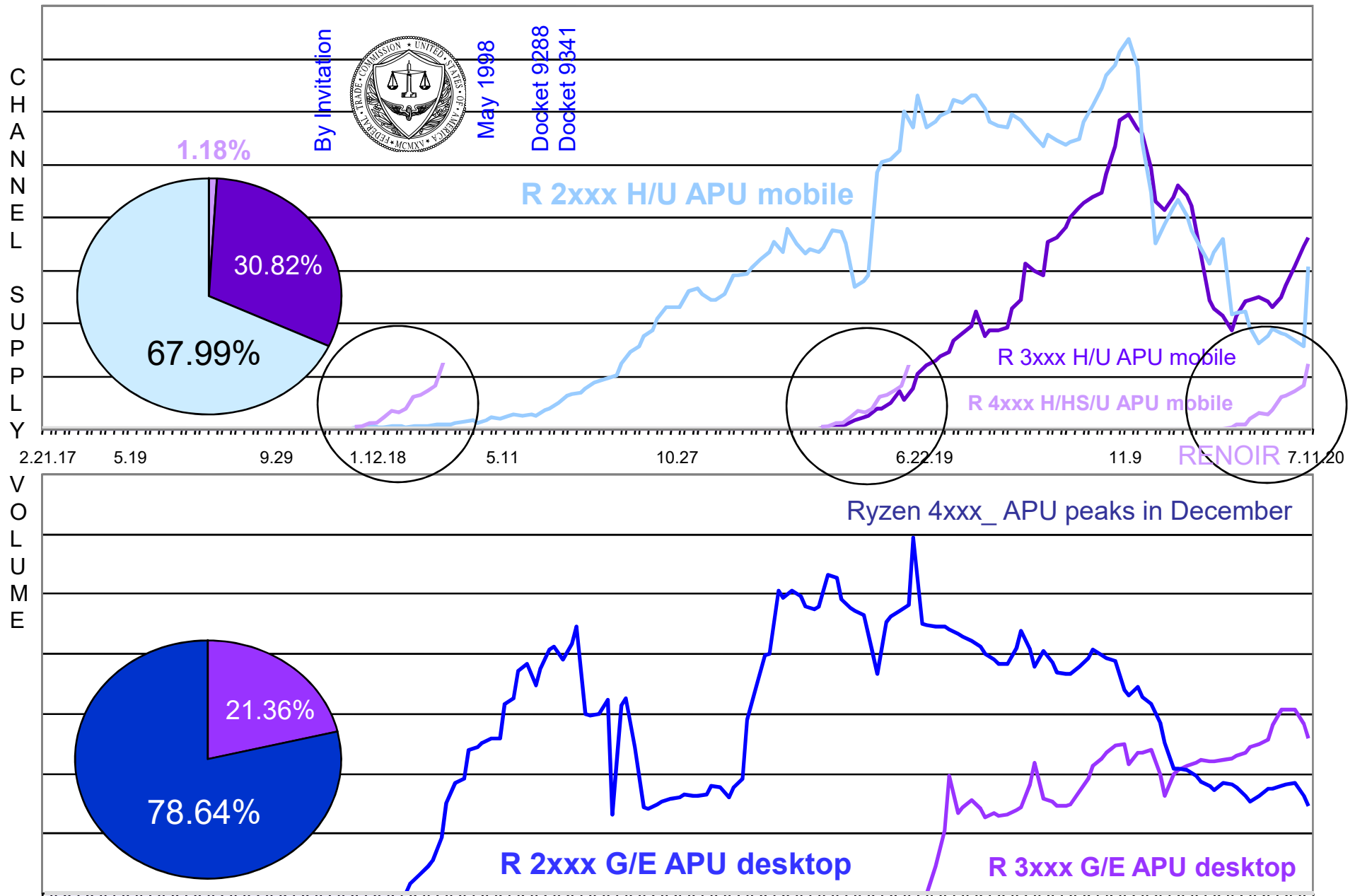
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



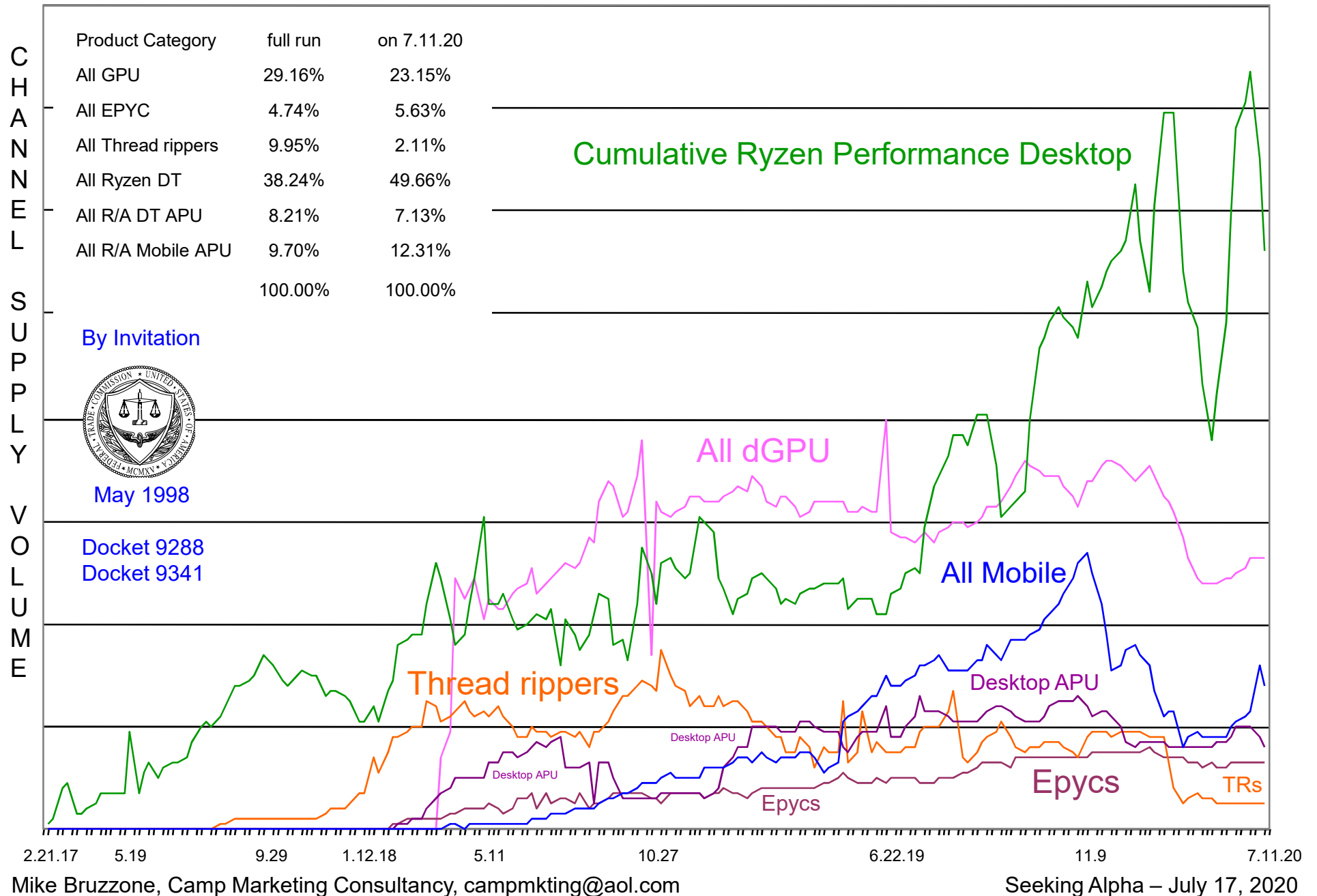
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



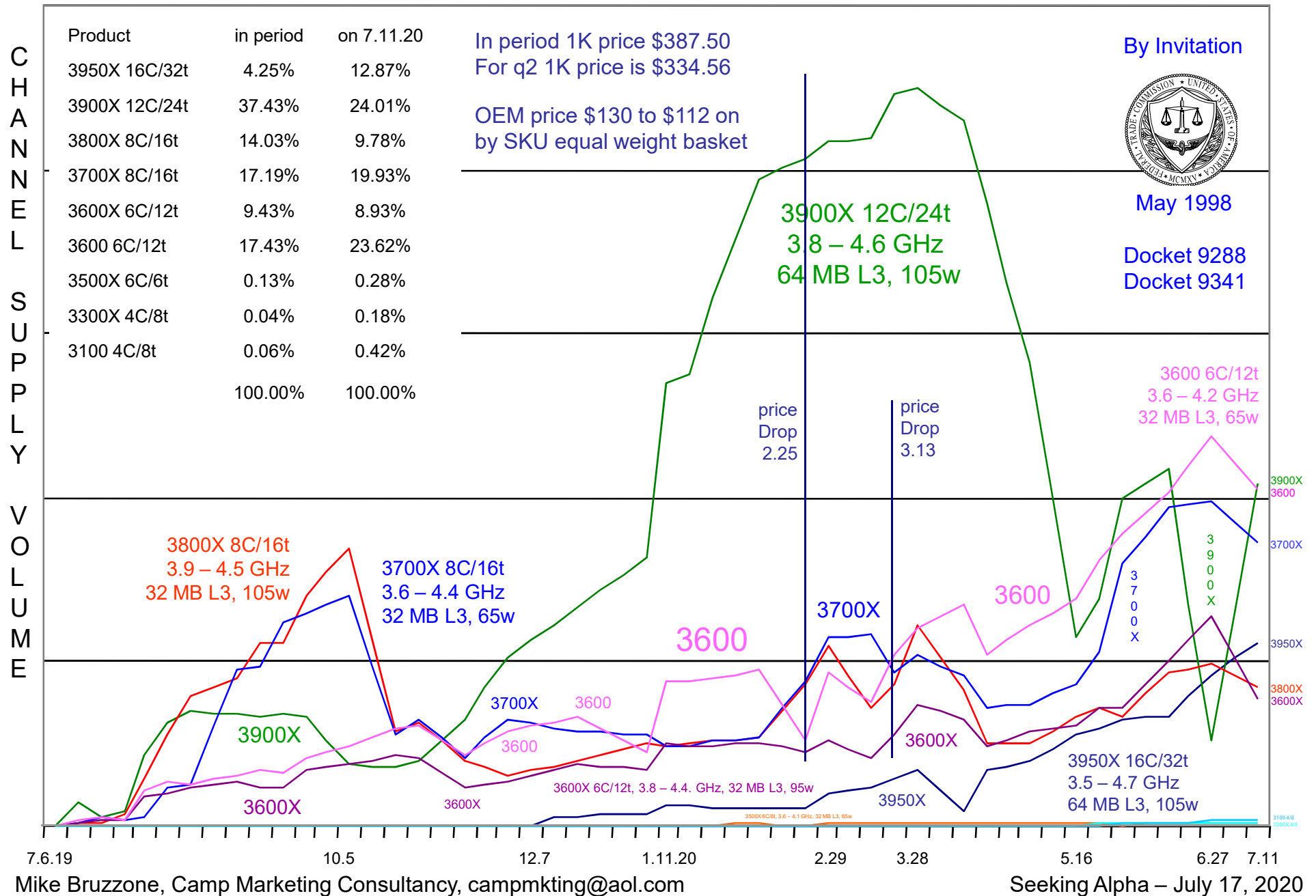
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



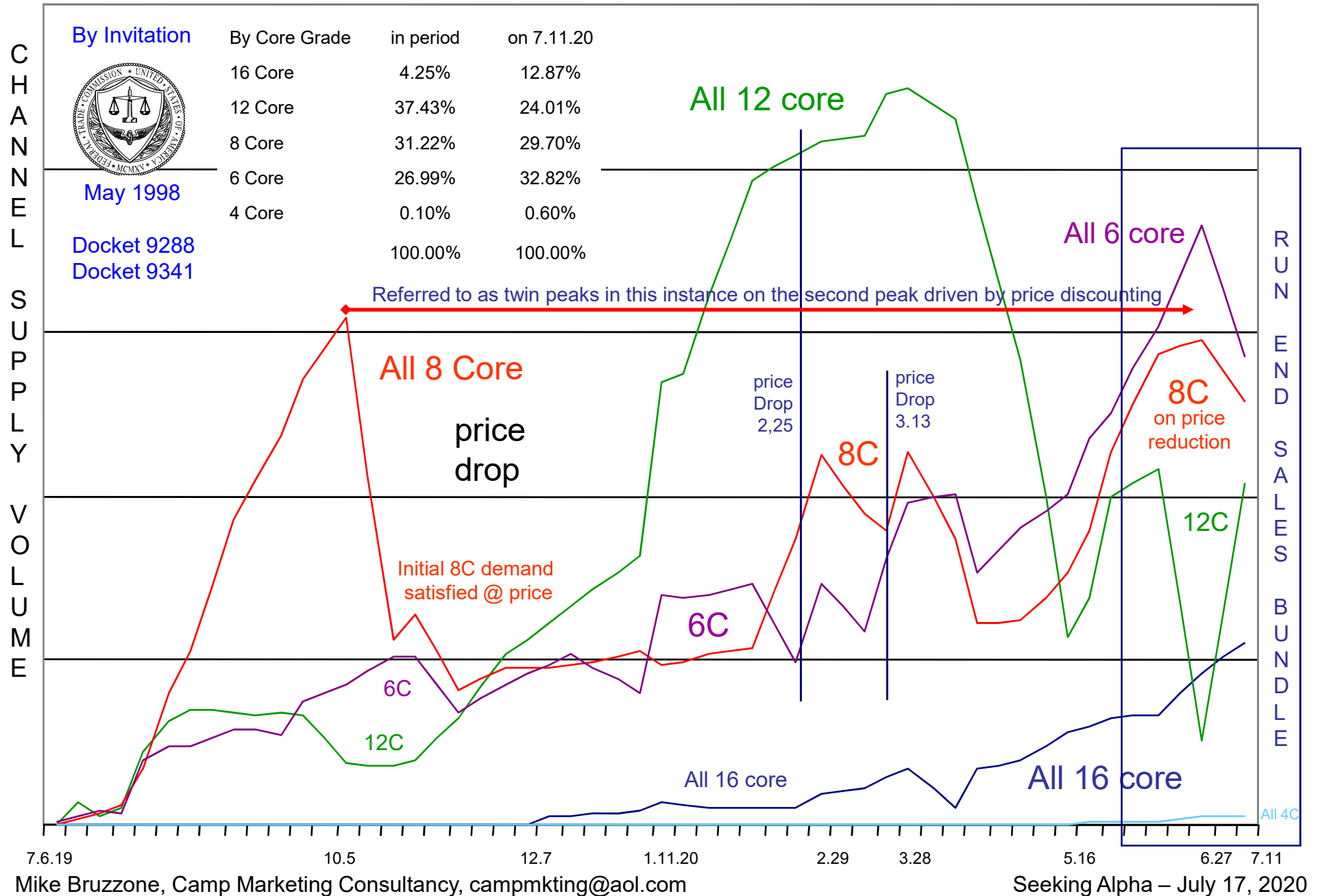
Camp Marketing Consultancy – AMD q2 2020 Channel Inventory at 181 Weeks Supply



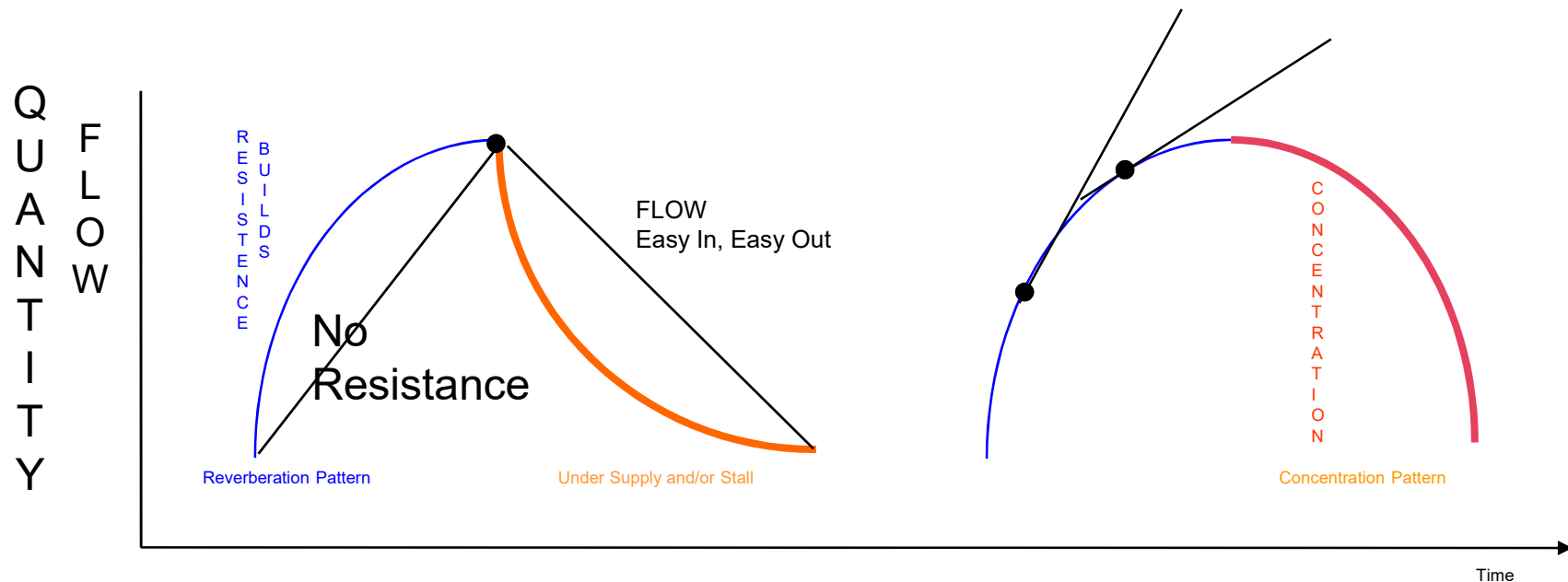
Camp Marketing Consultancy – AMD Ryzen 39/38/37/36/35/33/31xx_ @ 54 weeks supply



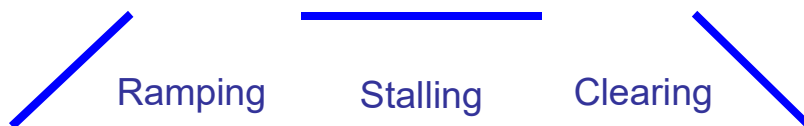
Camp Marketing Consultancy – AMD Ryzen 39/38/37/36/35/33/31xx_ @ 54 weeks supply



Comparing Beer's Patterns of Reverberation and Concentration



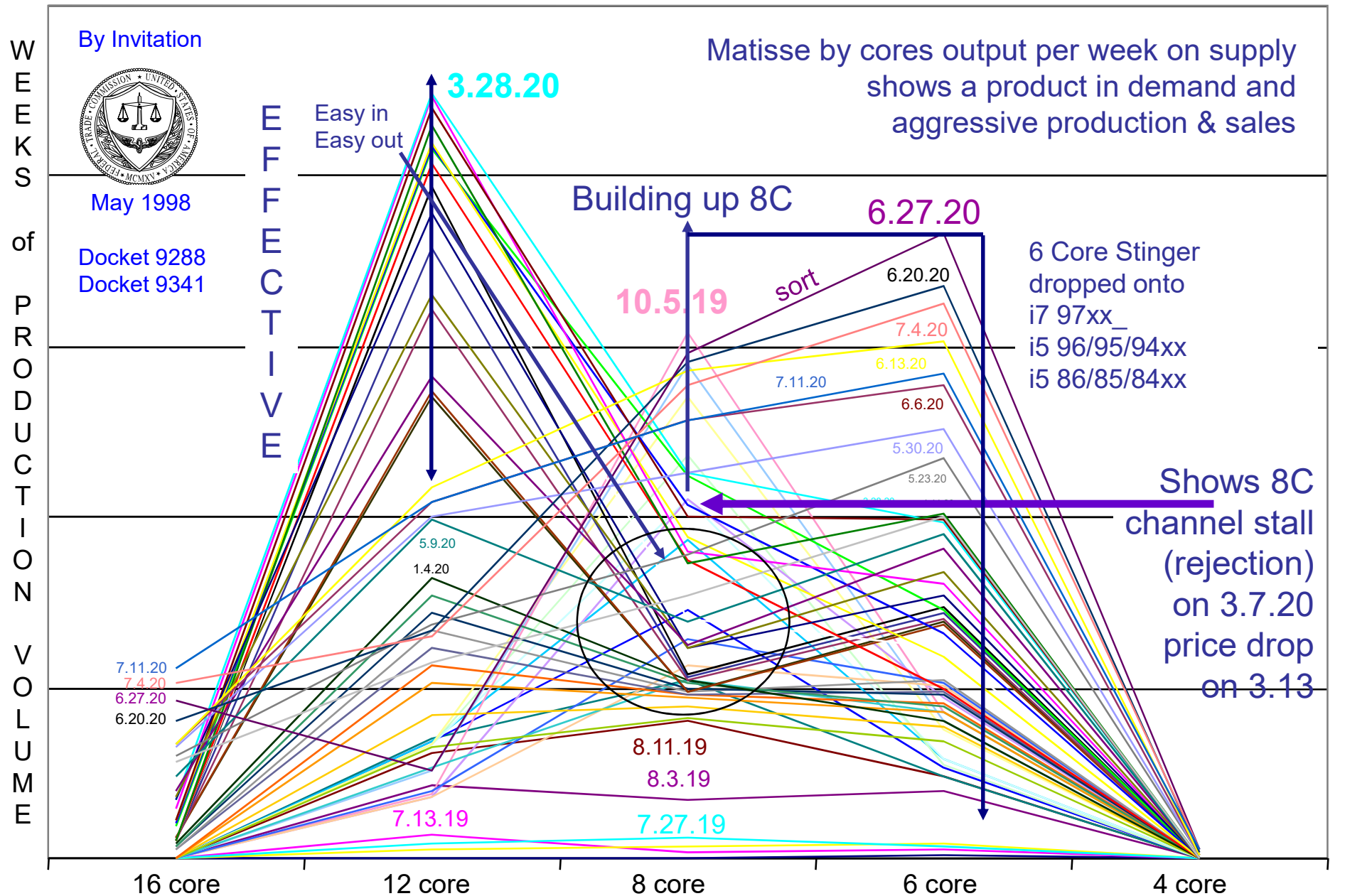
Indicator of Stall or
Rejection in Supply Channel.



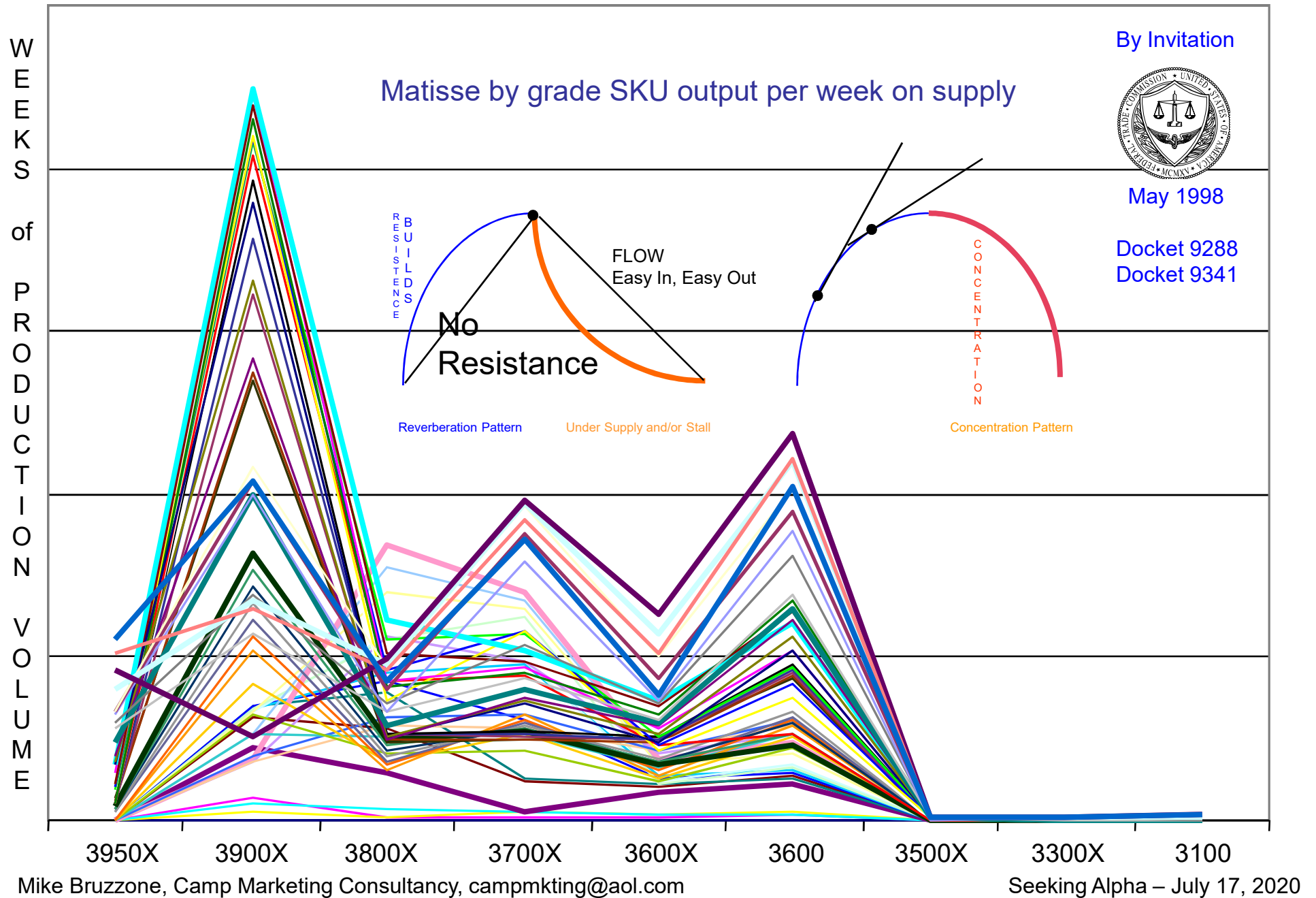
Causes of Congestion
in Supply Channel.



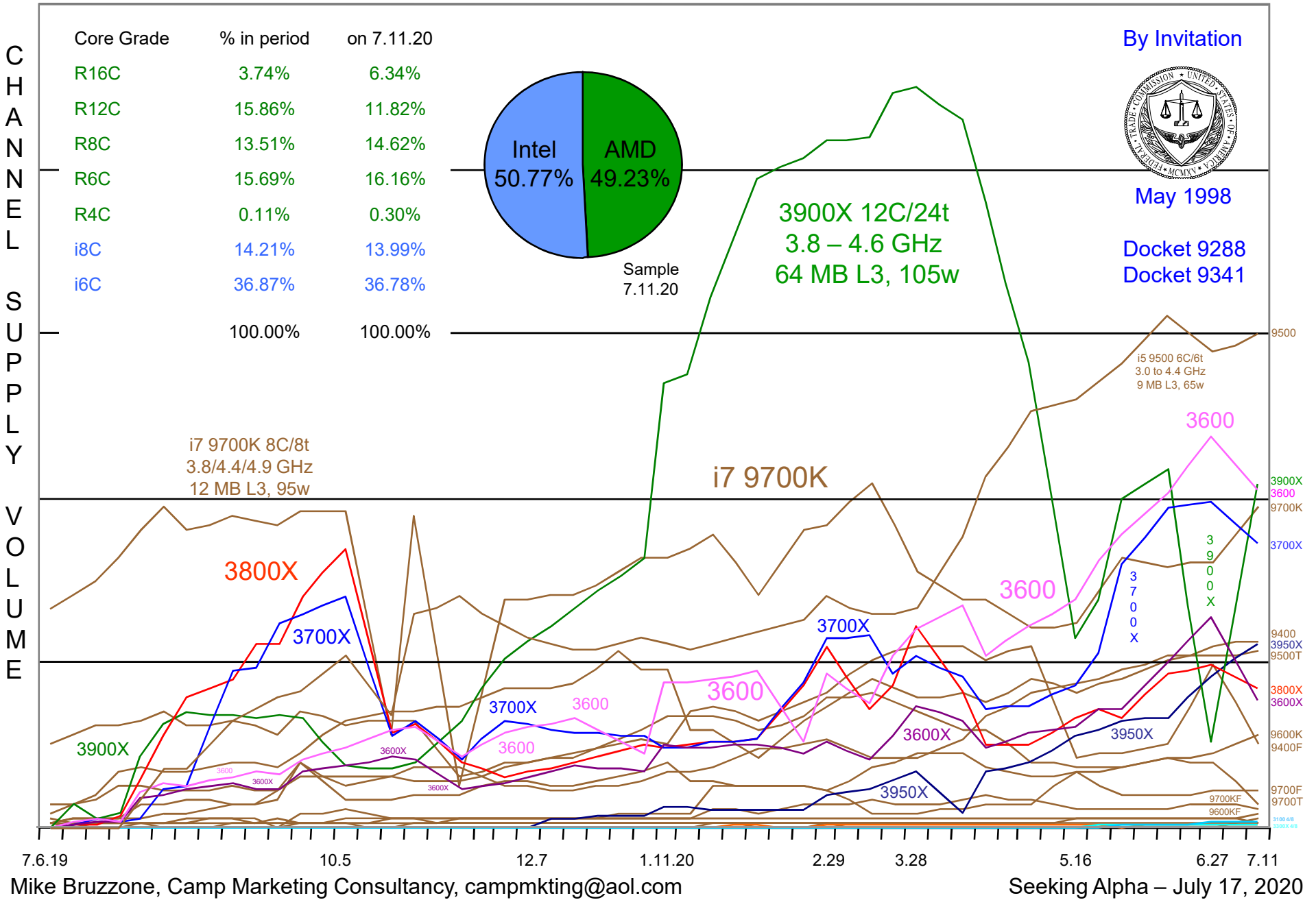
Camp Marketing Consultancy – AMD Ryzen 39/38/37/36/35/33/31xx_ @ 54 weeks supply



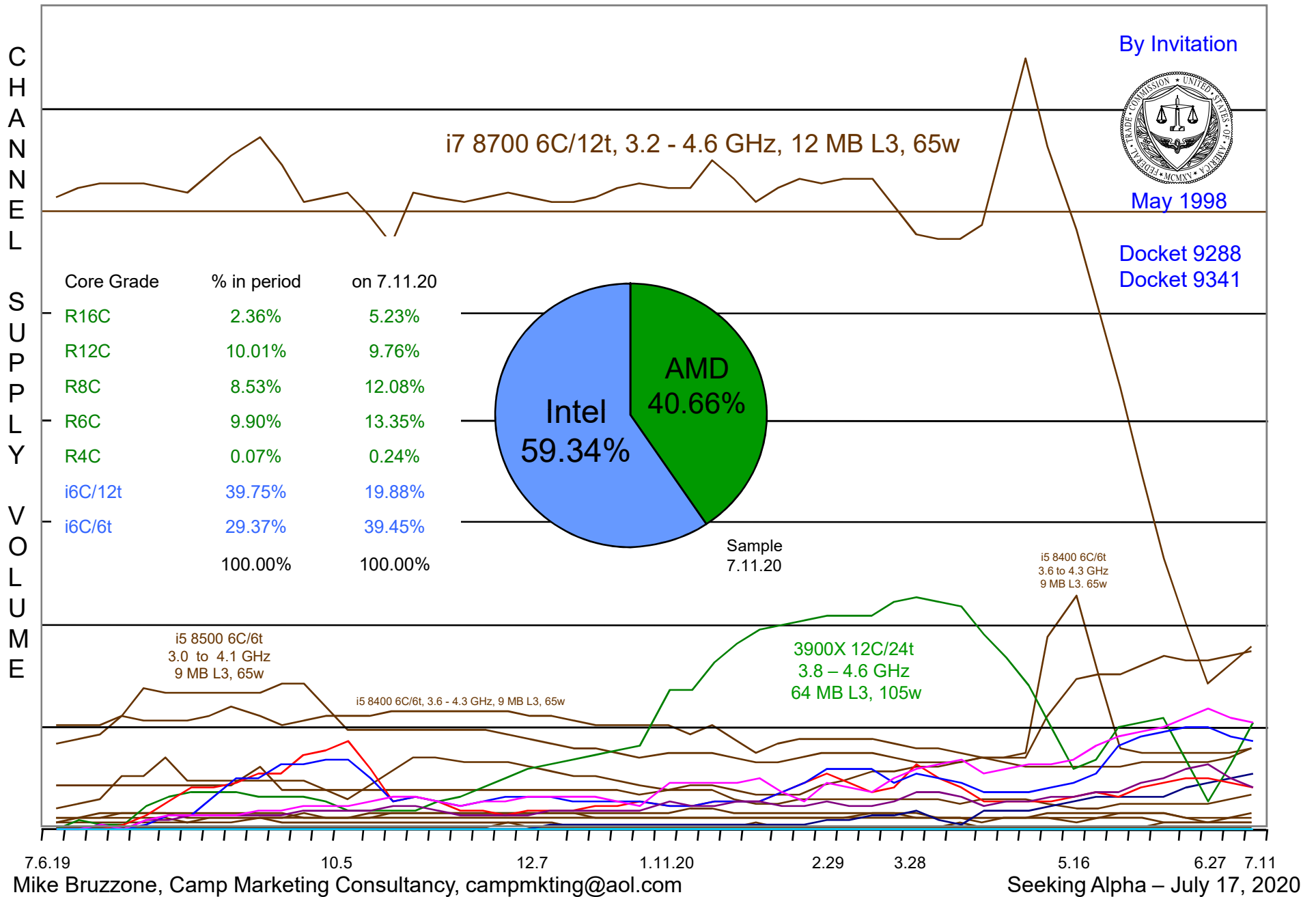
Camp Marketing Consultancy – AMD Ryzen 39/38/37/36/35/33/31xx_ @ 54 weeks supply



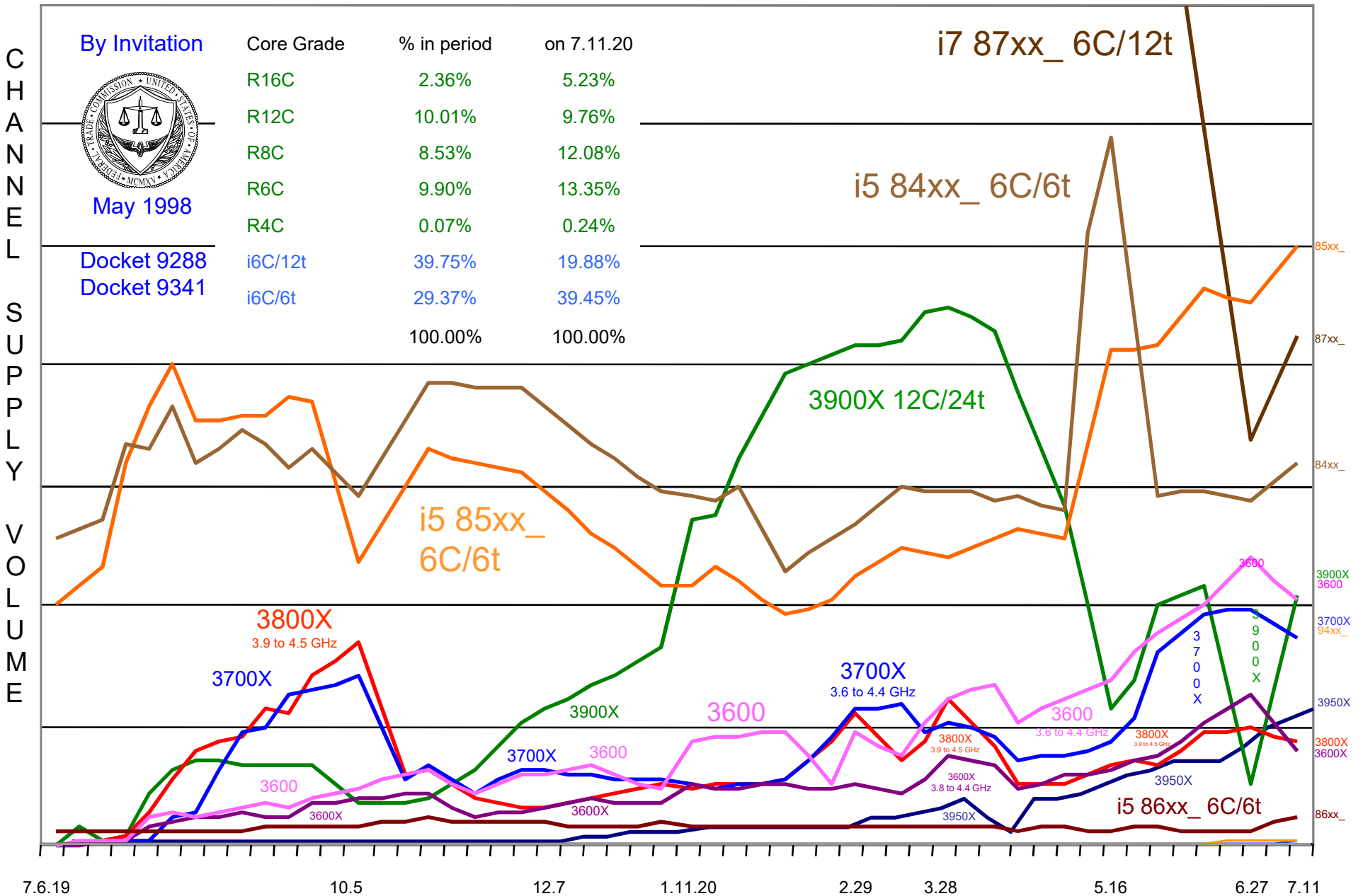
Camp Marketing Consultancy – AMD R3xxx_ on Intel i7/i5 9xxx through 54 weeks supply



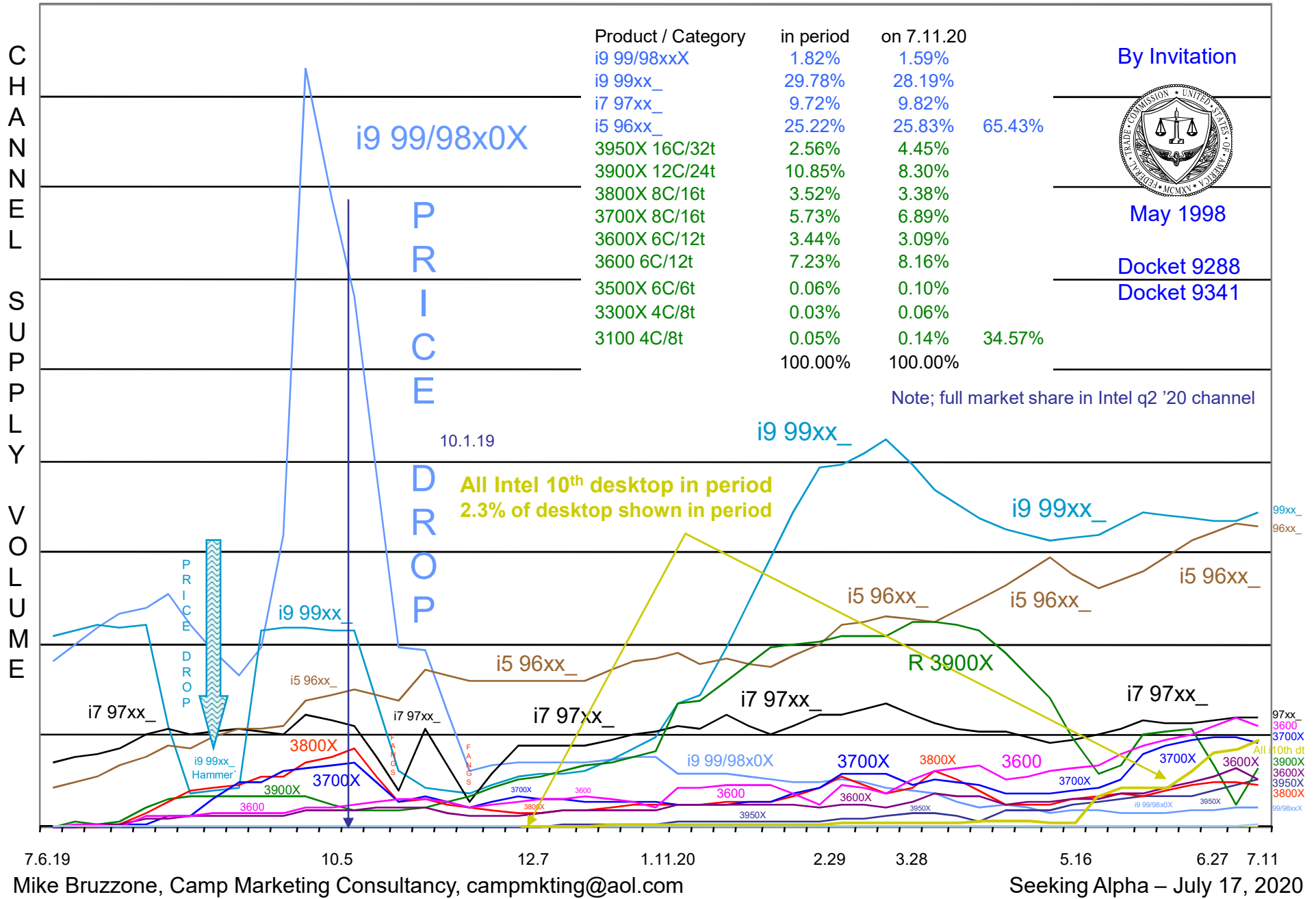
Camp Marketing Consultancy – Intel i7/i5 8xxx on AMD R3xxx_ through 54 weeks supply



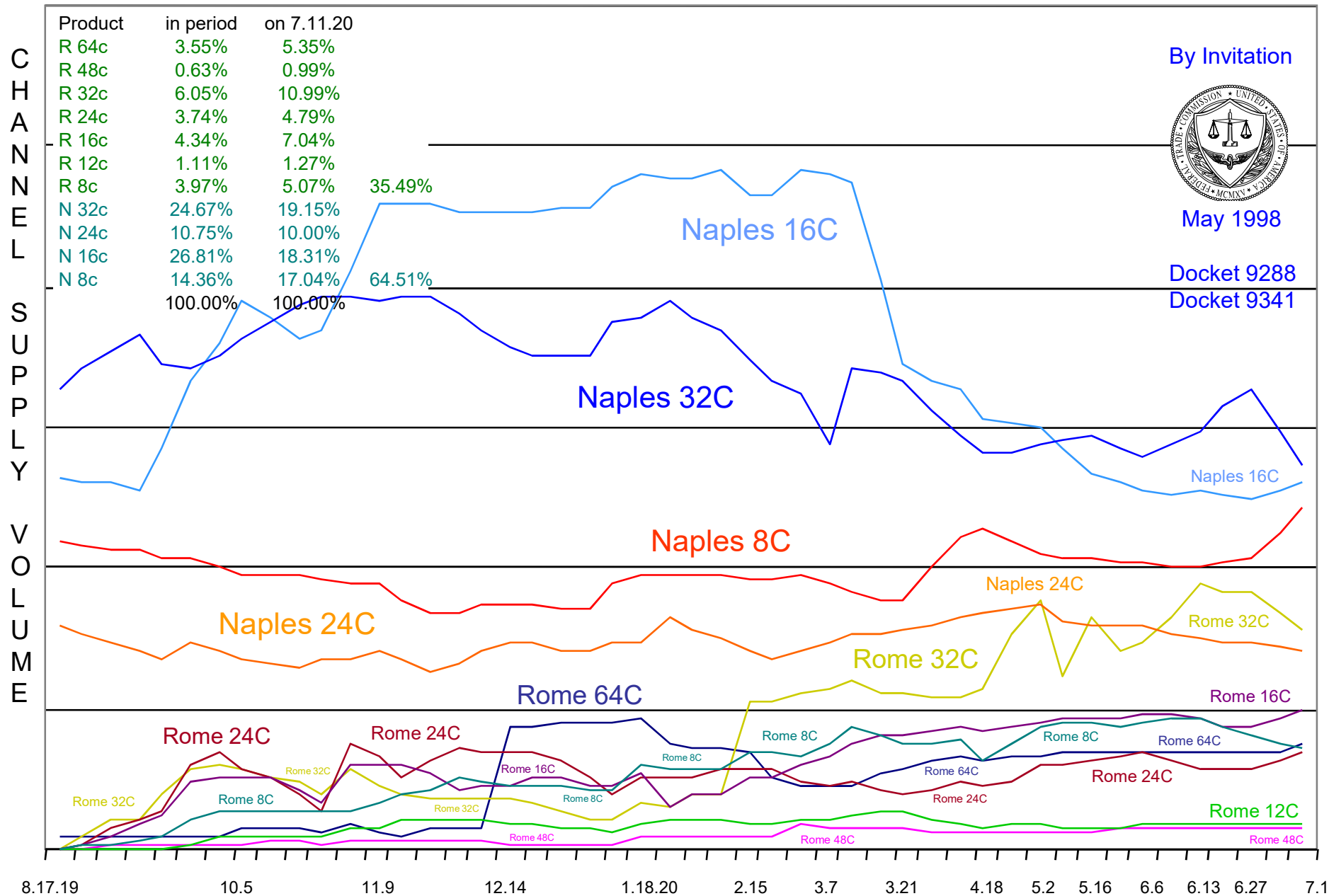
Camp Marketing Consultancy – Intel i7/i5 8xxx on AMD R3xxx_ through 54 weeks supply



Camp Marketing Consultancy – Intel i9/i7/i5 9xxx on AMD R3xxx_ through 54 weeks supply



Camp Marketing Consultancy – AMD Epyc Naples and Rome through 48 weeks supply



By Invitation

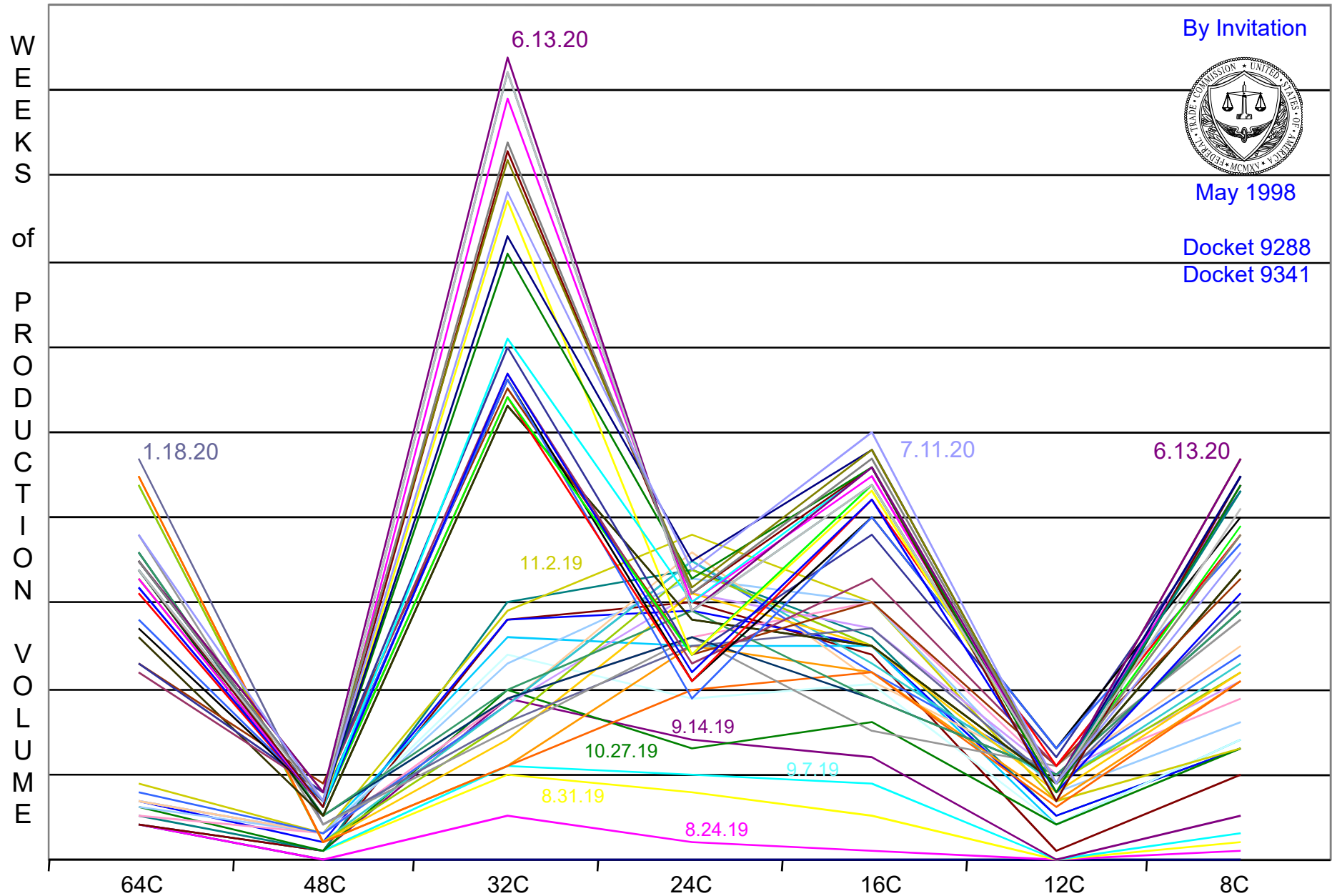


May 1998

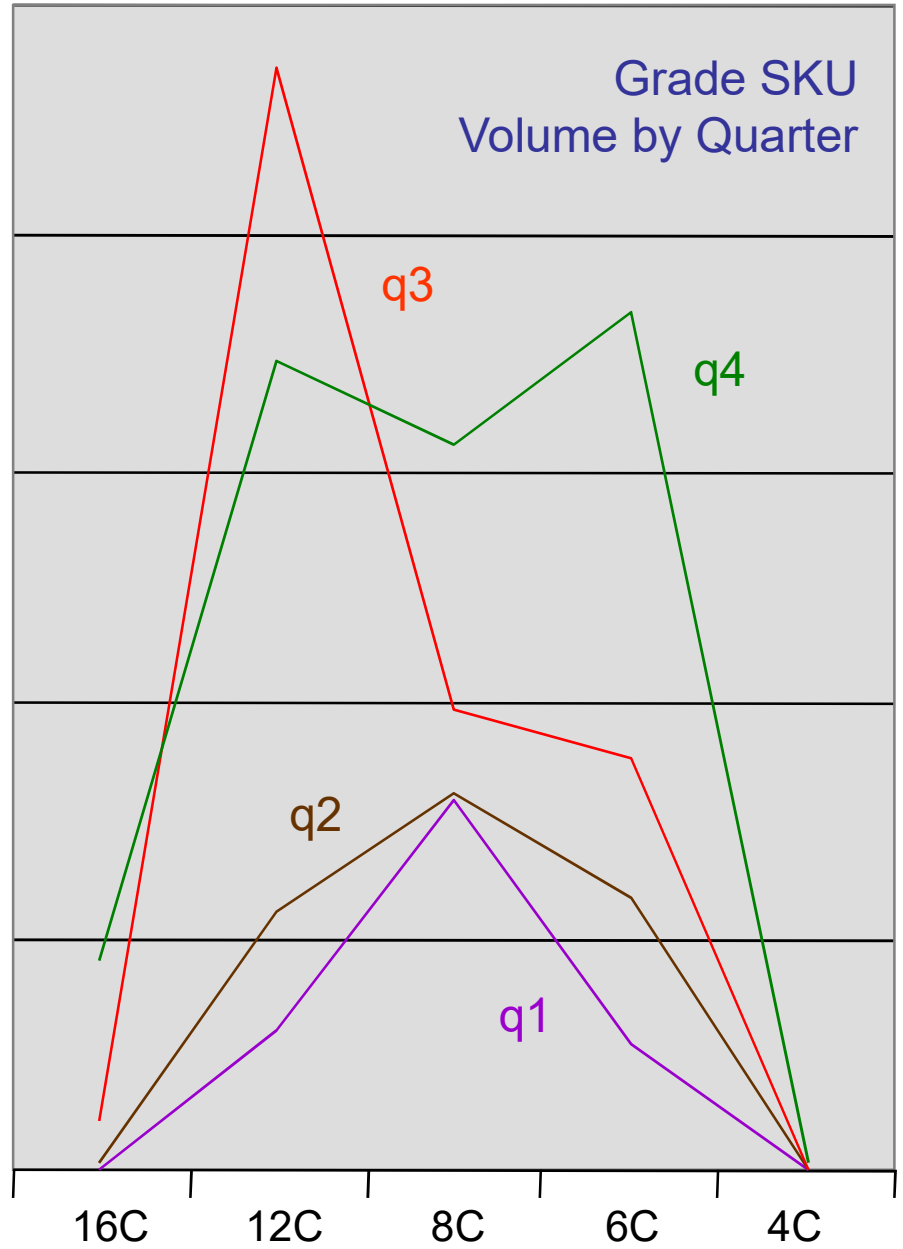
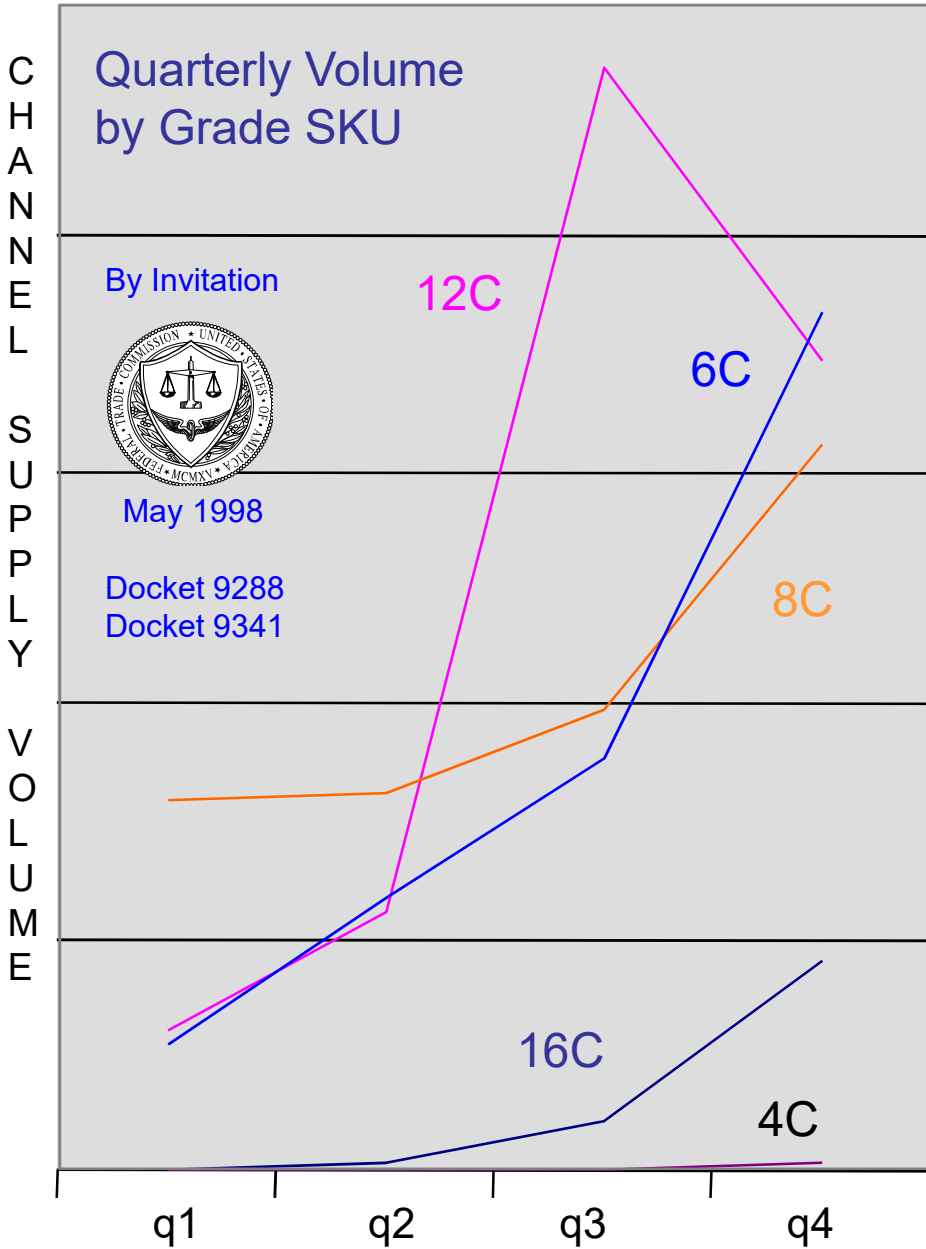
Docket 9288

Docket 9341

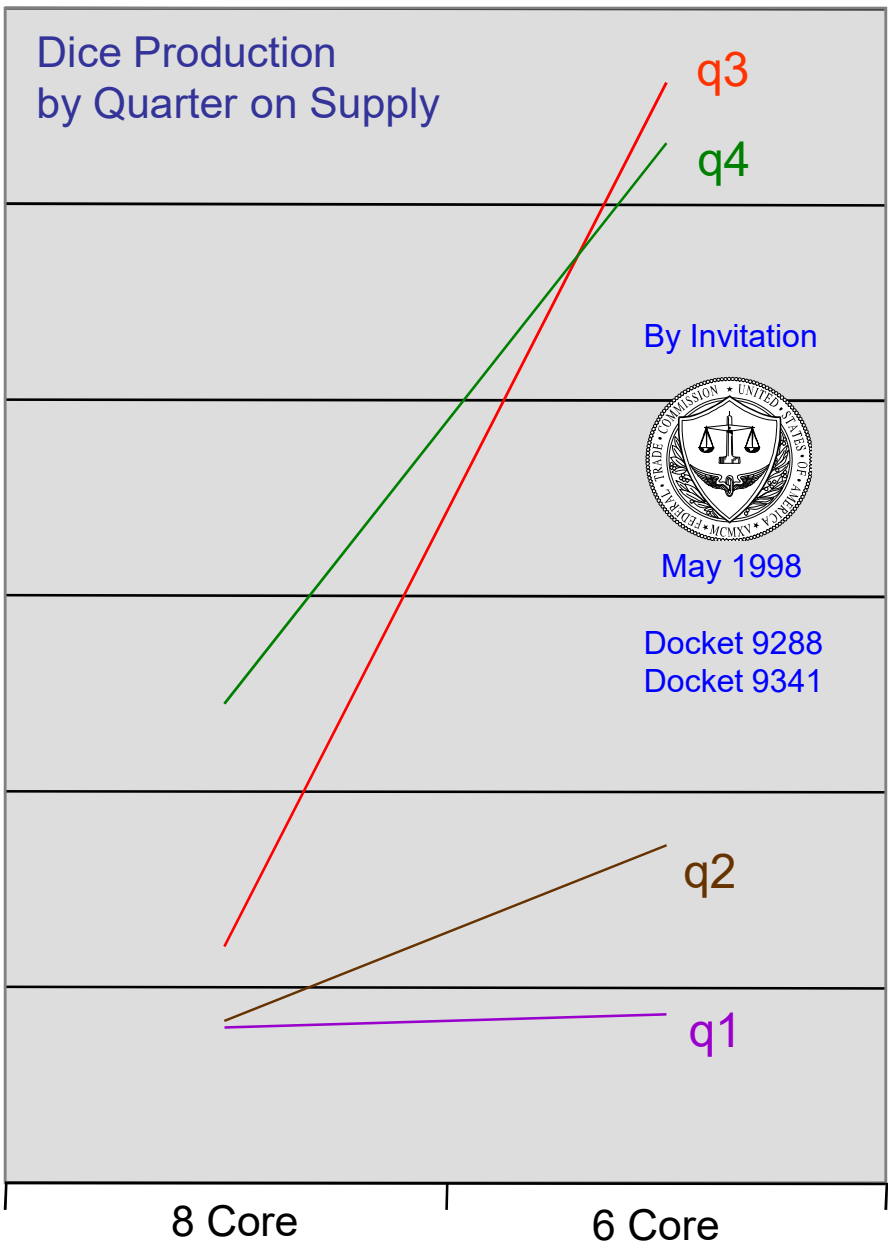
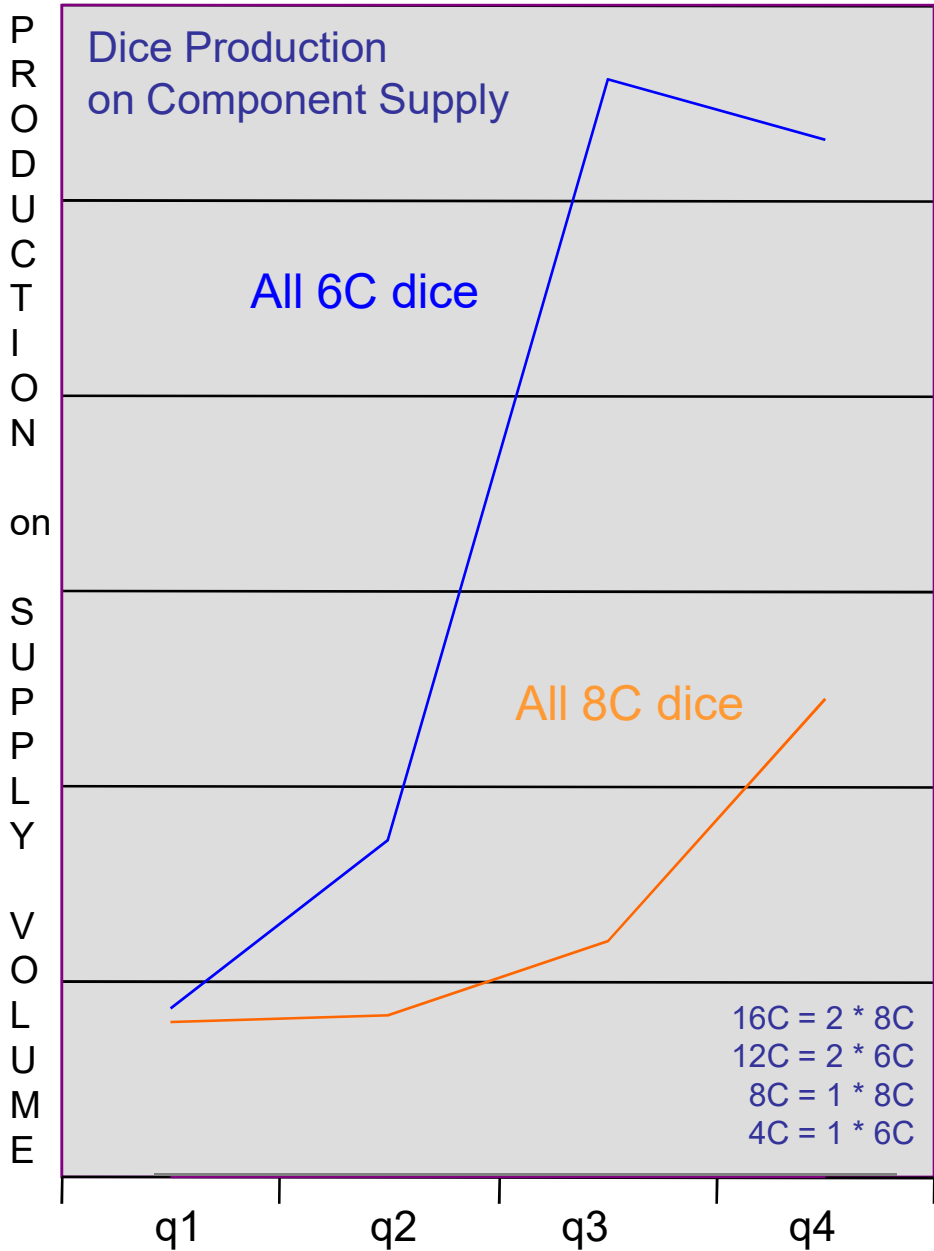
Camp Marketing Consultancy – Epyc Rome by Core Grade Production on Supply



Camp Marketing Consultancy – Look at Ryzen 3xxx_ Production Economics @ ~ 26 M units



Camp Marketing Consultancy – Look at Ryzen 3xxx_ Production Economics @ ~ 26 M units



Camp Marketing Consultancy – Look at Ryzen 3xxx_ Production Economics @ ~ 26 M units

On 1K pricing and in quarter volume, component in quarter Average Weighed Price

\$ @ 1K	q1 supply q2 2019	Q2 supply	Q3 supply	Q4 = Now
16C AWP	\$749.00	\$749.00	\$699.00	\$699.00
12C AWP	\$499.00	\$499.00	\$449.00	\$419.19
8C AWP	\$376.45	\$372.36	\$289.62	\$287.36
6C AWP	\$221.22	\$217.88	\$174.12	\$166.16
4C AWP	\$0.00	\$0.00	\$0.00	\$107.37

On 1K pricing and component in quarter volume, Average Weighed Price for Dice

\$ @ 1K	q1	q2	q3	q4
8C AWP	\$367.44	\$362.08	\$300.36	\$379.18
6C AWP	\$240.71	\$236.61	\$217.01	\$194.28

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16 Core calculated $2 * 8C$, $12C = 2 * 6C$, $8C = 1 * 8C$, $4C = 1 * 6C$

Camp Marketing Consultancy – Look at Ryzen 3xxx_ Production Economics @ ~ 26 M units

On 1K price / 3 = OEM volume Average Weighed Price in quarter

@ 1K / 3	q1 supply q2 2019	Q2 supply	Q3 supply	Q4 = NOW
16C OEM price	\$250	\$250	\$233	\$233
12C OEM	\$166	\$166	\$150	\$140
8C OEM	\$125	\$124	\$97	\$96
6C OEM	\$74	\$73	\$58	\$55
4C OEM	\$0	\$0	\$0	\$36 (free)

On 1K pricing / 3 = Average Weighed Price to AMD for dice / package / test / mark up

@ 1K / 3	q1	q2	q3	q4
8C dice	\$122	\$121	\$100	\$126
6C dice	\$80	\$79	\$72	\$65

16 Core calculated $2 * 8C$, $12C = 2 * 6C$, $8C = 1 * 8C$, $4C = 1 * 6C$

By Invitation



May 1998

Docket 9288

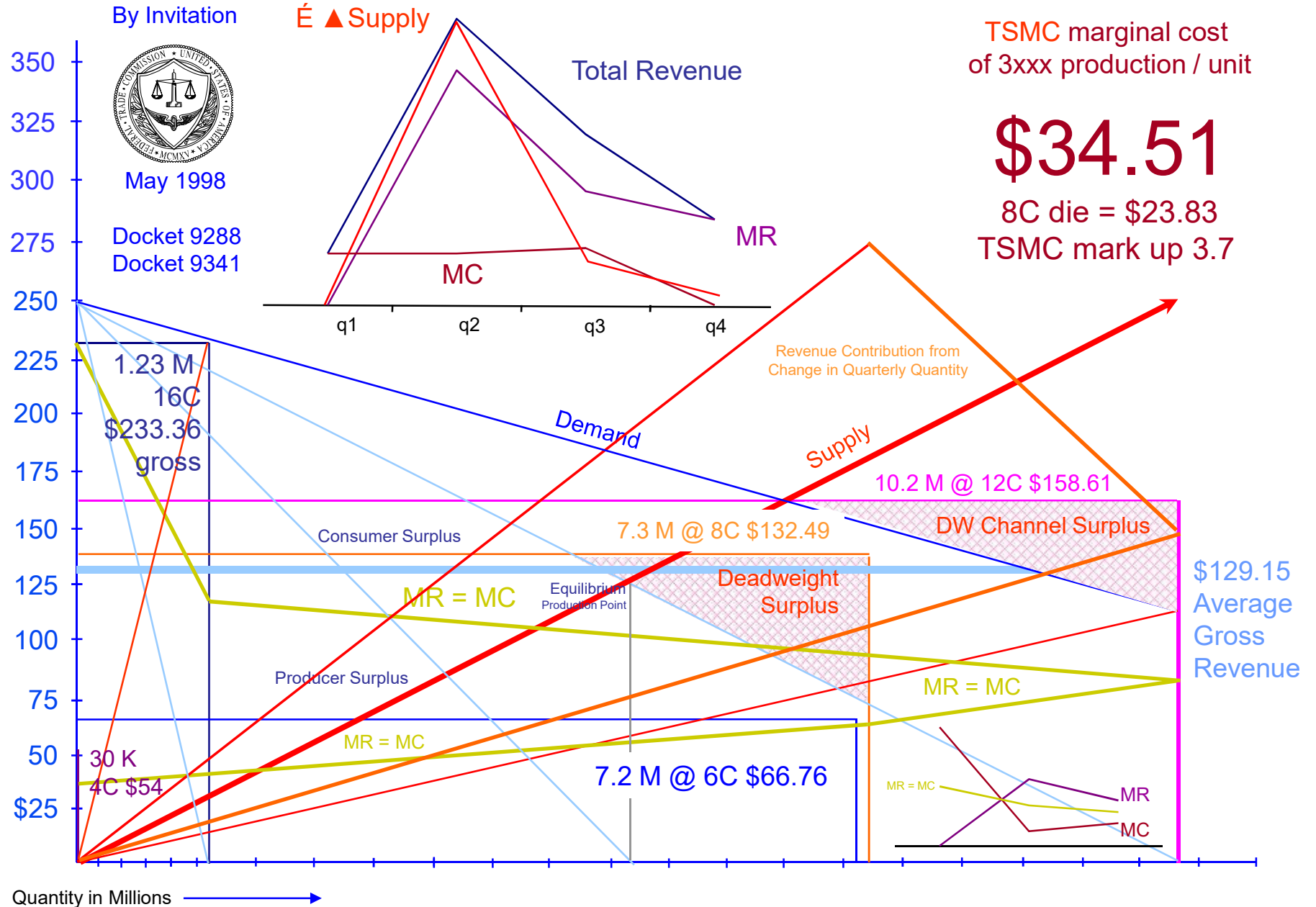
Docket 9341

TSMC average price per produced 8 Core Zen 3xxx component = \$88

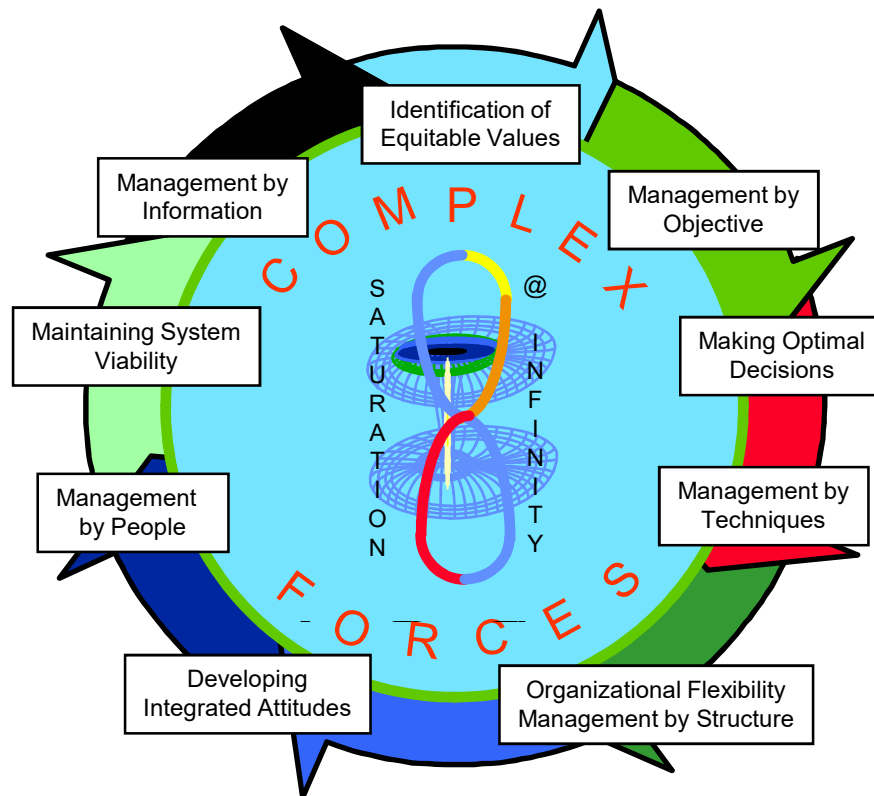
TSMC cost per produced 8C dice = \$24

Package premium for x2 dice = \$31

Camp Marketing Consultancy – Look at Ryzen 3xxx_ Production Economics @ ~ 26 M units



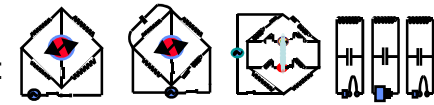
Camp Marketing Consulting



MIKE BRUZZONE – Camp Marketing Consultancy

Kaizen culture, practitioner of Benkyou, no politics, get the job done. Specializing in operational research, market relations, segment management, product evangelism, planning & tactical implementation, competitor and cluster strategy, product commercialization.

Project Framework:



Move beyond the box they paint for you.

To give intelligent, responsible, and capable direction for sustainable business within industry for society.

As a prerequisite for planning that serves customers and society as efficiently and effectively as possible.

Understand technology and business possibilities to meet the needs of customers and society as *cost effectively* as possible.

With exemplar stewardship cognizant of social welfare.

By enlarging the capabilities of the operation; melding together people, process, design, fabrication and utility knowledge for competitive advantage.

To assess equal opportunity for complimentary participation; partnership, cost and reward sharing.

To recognize the obligation to investors; planning for an *adequate* economic return on their investment.

To address economic responsibility as a design and process steward in the countries of industry operation.

To further the well being of the global electronics industry as an advocate of responsible, stable and sustainable growth models that make economic sense.