

**SEMICON
EUROPA**

FORWARD
AS ONE



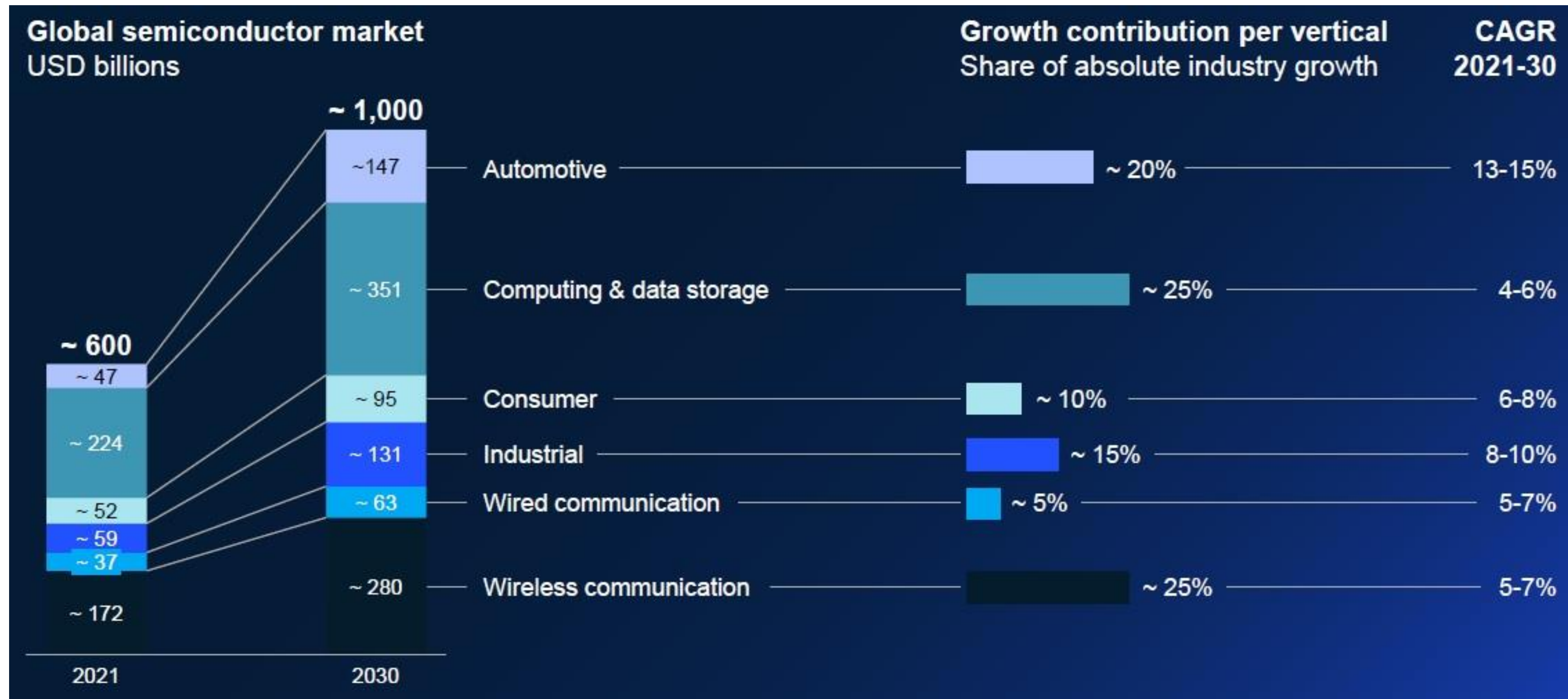
STRONGER
TOGETHER

SEMICON Europa CEO Summit Opening - Forging the Semiconductor Industry's Sustainable Path to \$1T

Ajit Manocha, President and CEO, SEMI
November 14, 2023



Digital Transformation and Disruptions Across Markets Driving Industry Growth to \$1T

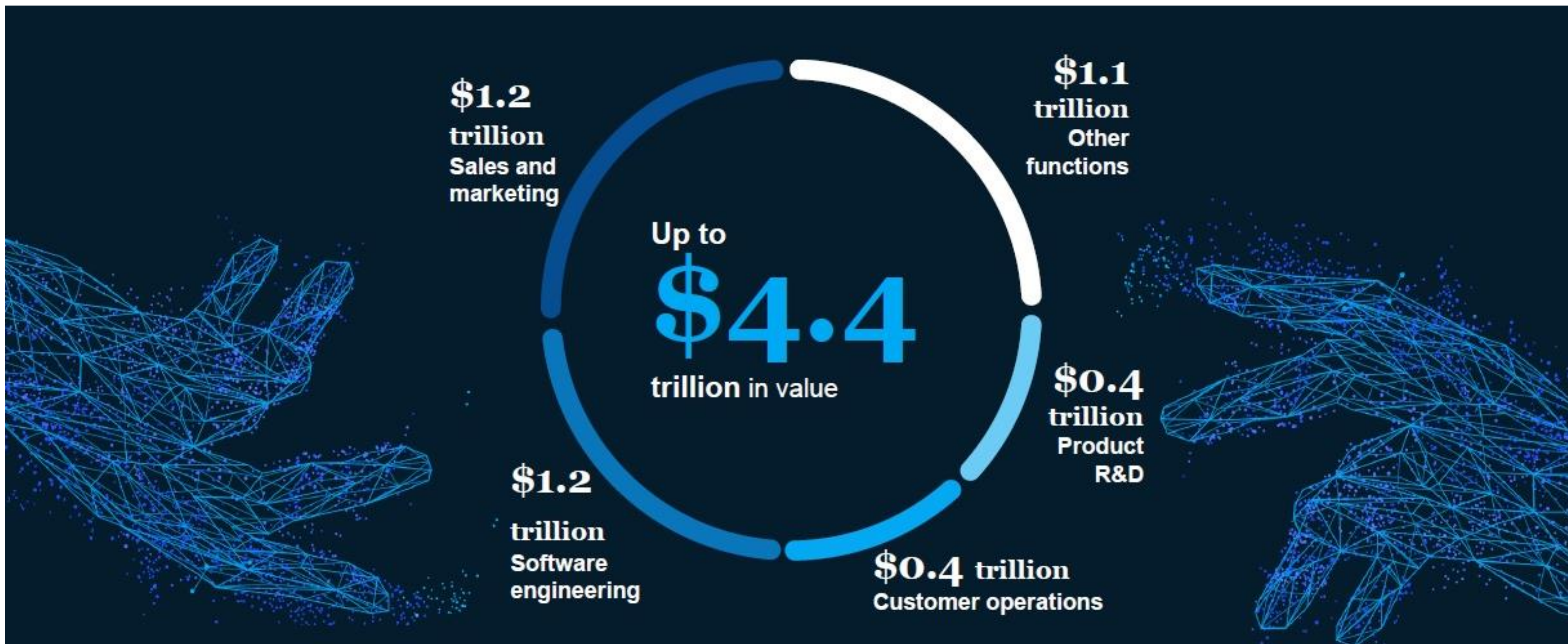


Europe well positioned to capture robust growth in Automotive and Industrial

Source: McKinsey & Co

SEMI and analyst firms projecting a \$1T semiconductor industry between 2030-2033

Everyone is Reaching for Opportunities Around Generative AI

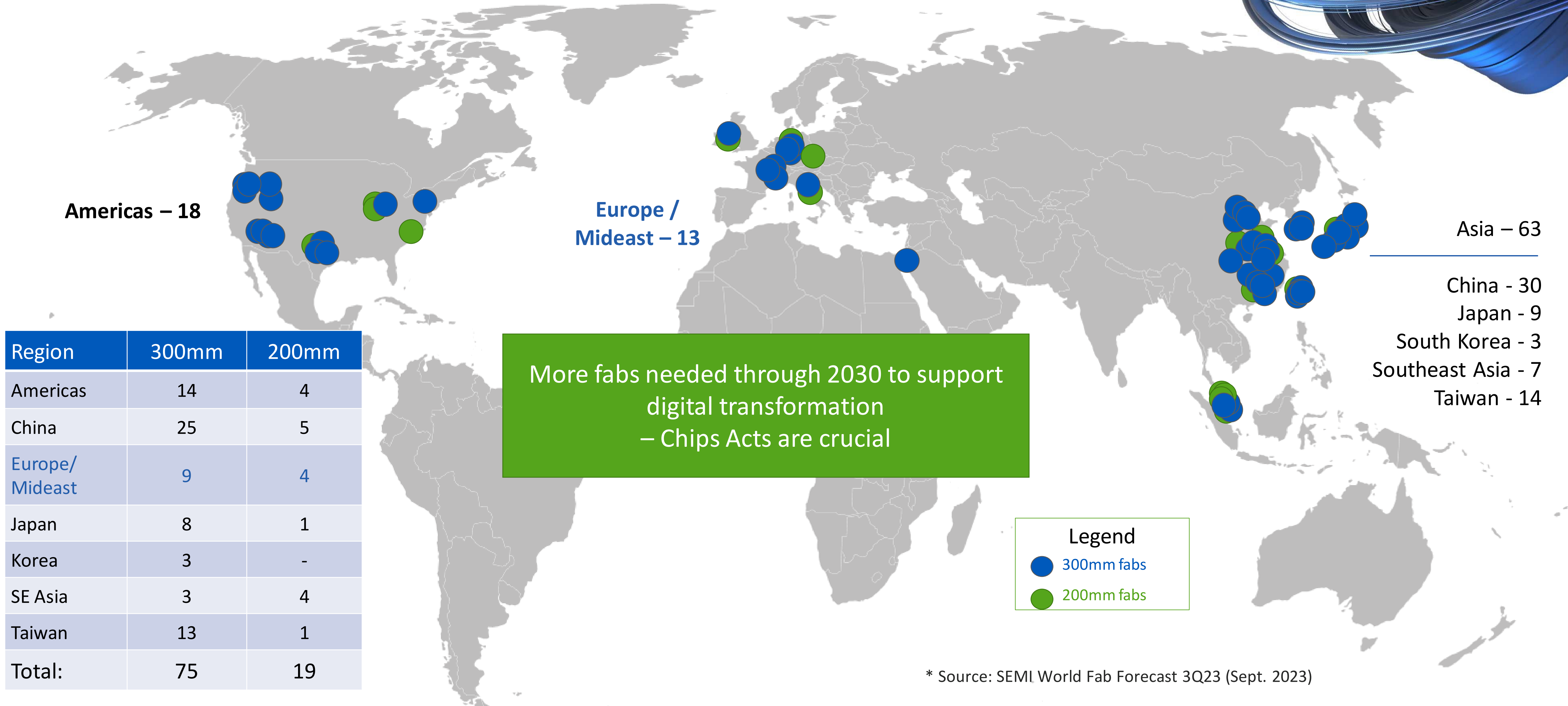


Source: McKinsey & Co. Analysis

GenAI will be a game-changer for the next decade, achieving human-level performance in some technical capabilities sooner than previously thought

Unprecedented Fab Production Capacity Expansion

94 New Fabs Coming Online Between 2022-2026 (78 of these in operation/equipping/construction)



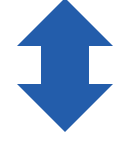
Challenges on the Minds of Global CEOs... Compounded by Capacity Expansion

- Global Economic Outlook
- Resilient Company

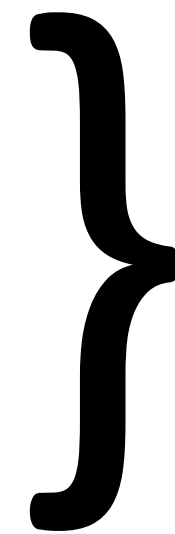
- Path to Net Zero



- War for Talent



- Supply Chain Redesign



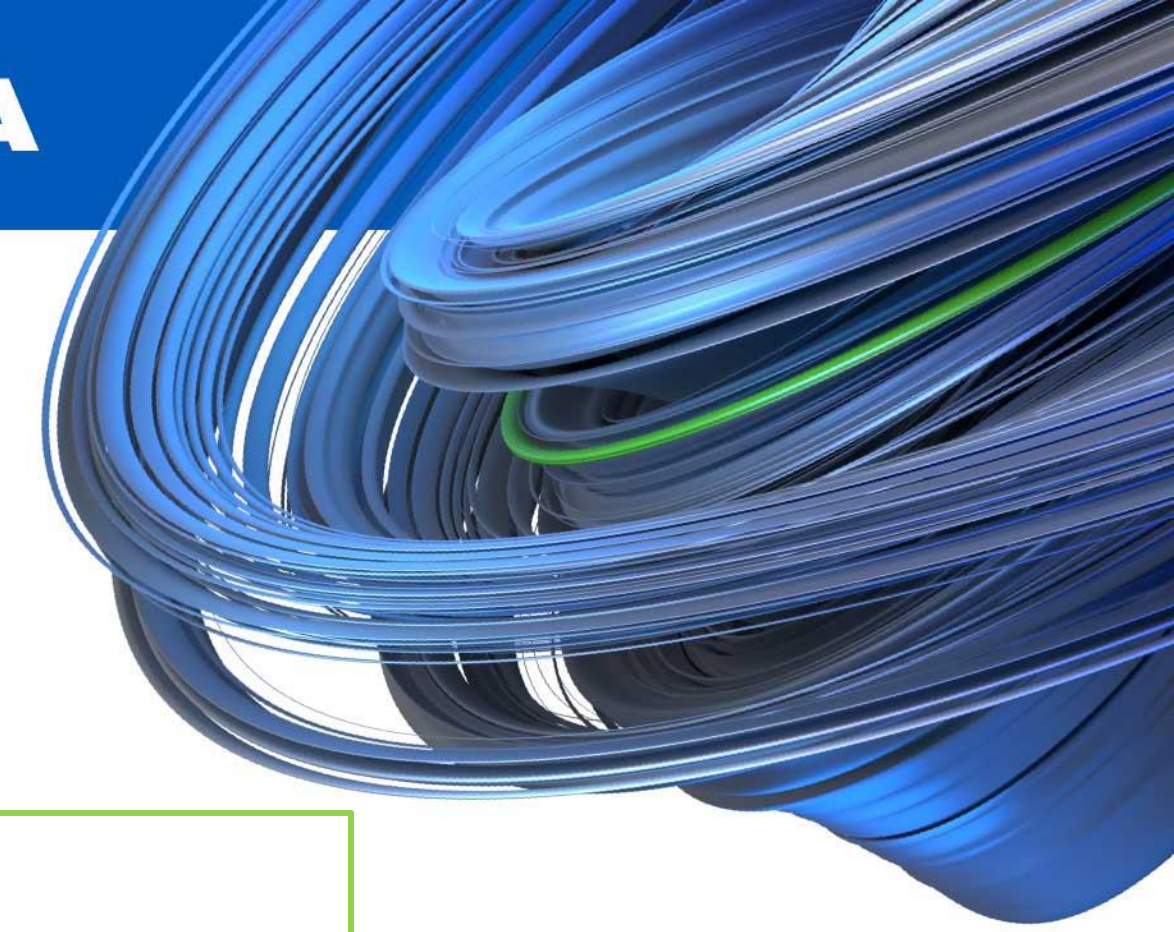
- Rising geopolitical tensions adding to these challenges

- PFAS restrictions a growing challenge – focus on finding viable alternatives

Sources: McKinsey & Co., SEMI

No single executive, company or country can address these: Governments and the industry must collaborate on solutions.

Forging the Path Forward with 3,000+ SEMI Member Companies Around the World



Path to Net Zero

SEMI Sustainability Initiative and Semiconductor Climate Consortium (SCC)

- SCC launched in 2022 with 90+ companies and working groups delivering
- Ambitious plans for 2024 including new SCC Energy Collaborative

War for Talent

SEMI Foundation Workforce Development

- Populating the talent pipeline through VetWorks, SCAN programs, SEMICON events, etc.
- Partnerships established for US state WFD activities; expanding in EU and other regions

Supply Chain Redesign

SEMI Supply Chain Management Initiative

- Expanded Industry Advisory Committee to 13 global companies
- Guiding multiple workstreams on Resiliency, Agility and Risk Management

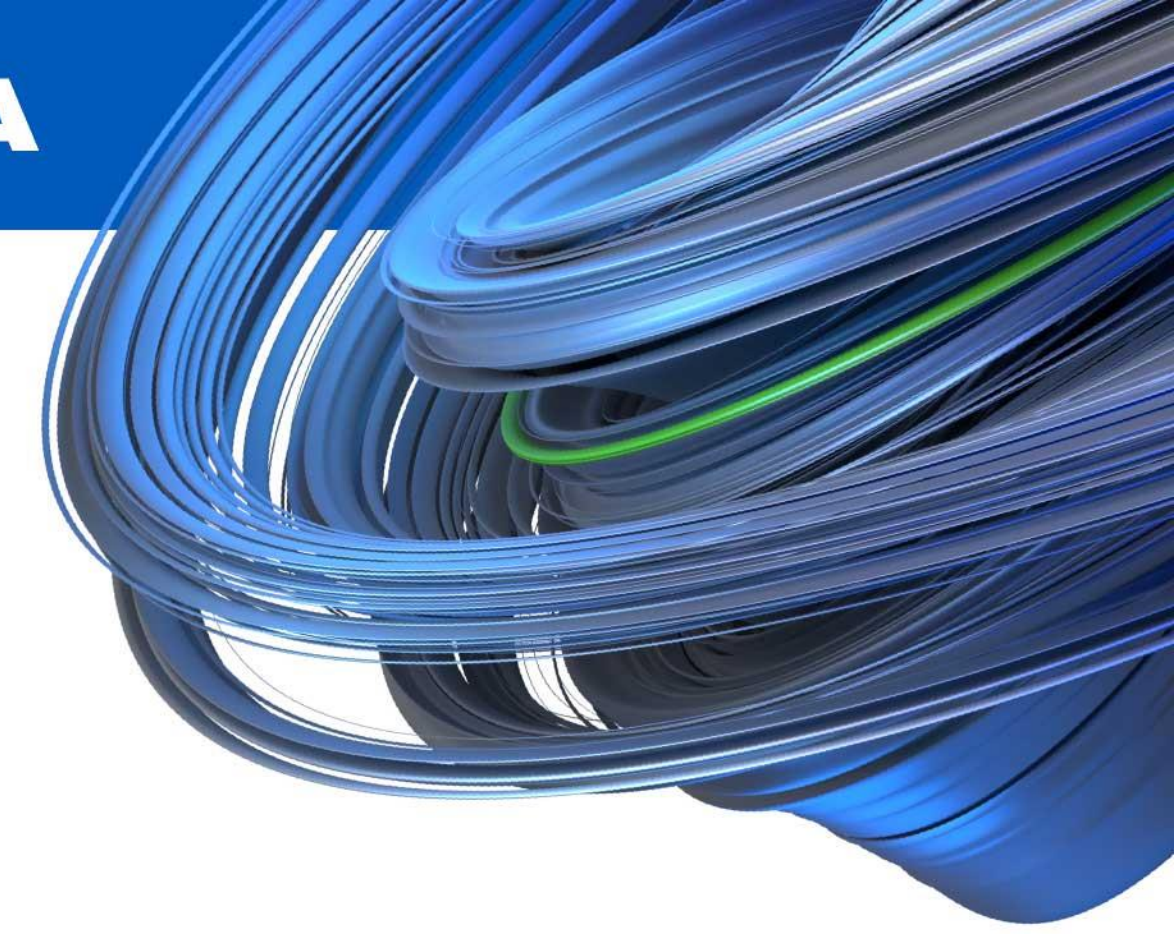
Geopolitical Tensions / Policy Issues

SEMI Global Advocacy & Public Policy

- Multiple meetings with policymakers around the world
- Successfully forging alignment between governments and industry to address challenges

Global challenges require global solutions – with massive collaboration!

New SEMI Opportunities to Advance the Industry and Your Business



International Semiconductor Policy Summit (ISPS)

- Historic meeting on 29th of October between global industry executives and officials from European Commission, U.S., Japan, Korea, Singapore and Taiwan – Fully embracing SEMI's multilateral platform
 - Policymakers committed to solicit industry feedback on future PFAS regulations and to ensure these efforts do not pose operational or economic disruptions
 - Executives to continue efforts to minimize PFAS usage and maintain a sharp focus on safety
 - Agreed to the need for public-private partnership on key challenges including R&D efforts on alternative PFAS chemistries, Workforce Development and Supply Chain Resiliency
- Next summit planned for 1.5 days between March 4-6, 2024, in Brussels ahead of ISS Europe

Inaugural SEMICON India 2024 Set for New Delhi on week of September 16 with CxO Summit

- Co-located with electronica / productronica India, replicating SEMICON Europa model in collaboration with Messe München India
- Local association partners will help to connect the world with India's fast-growing electronics ecosystem

Save the dates and plan to join us for these impactful events

Thank You for Collaborating with SEMI
on the Sustainable Path to \$1T!