

STRONGER
TOGETHER

Innovation and Collaboration: Powering Sustainable Exponential Industry Growth

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**SEMICON
EUROPA**

Unprecedented Growth Opportunities

Geopolitics, Chip Acts and Supply Chain Resiliency Initiatives all contribute to the investment shifts



3RD WAVE

Quantum

Growth beyond 2030?



2ND WAVE

AI

~ 50%

of overall semiconductor market growth will be driven by GenAI until 2030

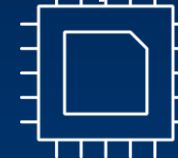


1ST WAVE

IoT

\$4.4T global market by 2030

Tech Disruptions



powered by chips

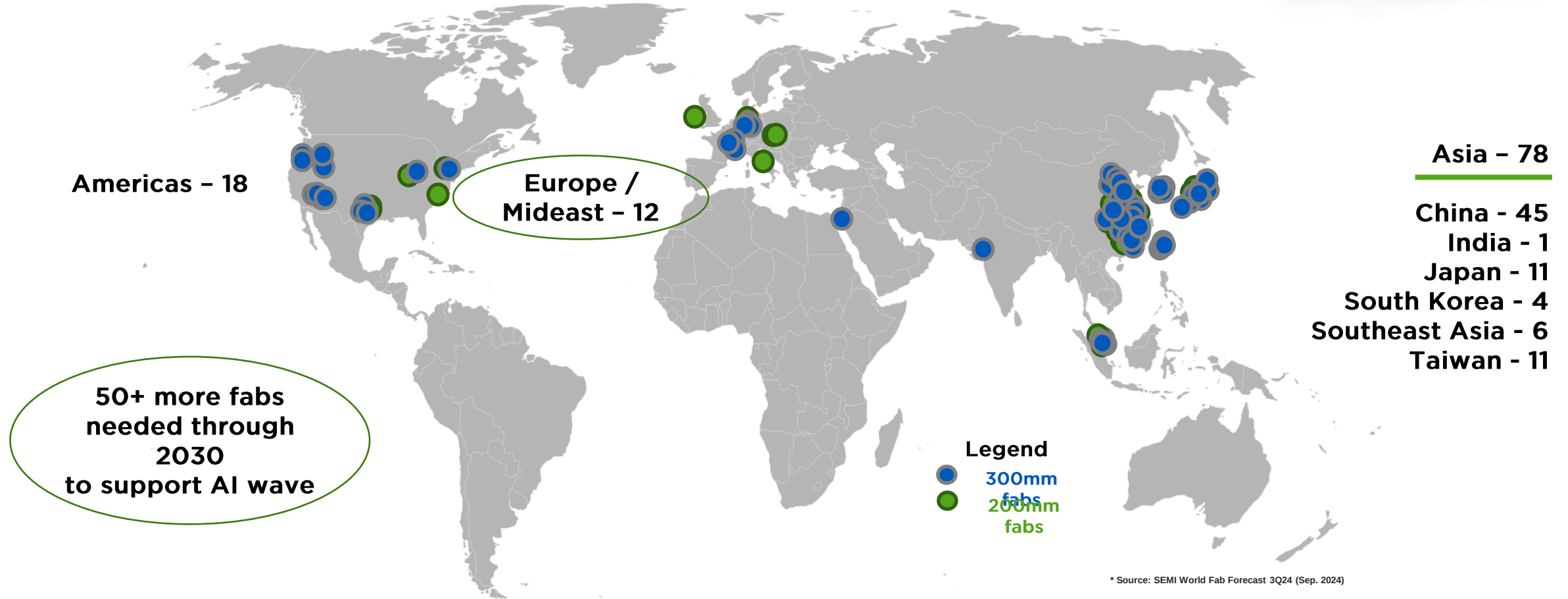
\$1 Trillion by 2030

Sources: SEMI and McKinsey & Co.

Fab Expansions to Realize \$1T

108 300mm and 200mm New Fabs Coming Online Between 2023-2027*

- 87 in progress with 34 in operation, 18 equipping and 35 under construction



Dynamics and Shifts in Fab Investments

Geopolitics, Chip Acts and Supply Chain Resiliency Initiatives all contribute to the investment shifts

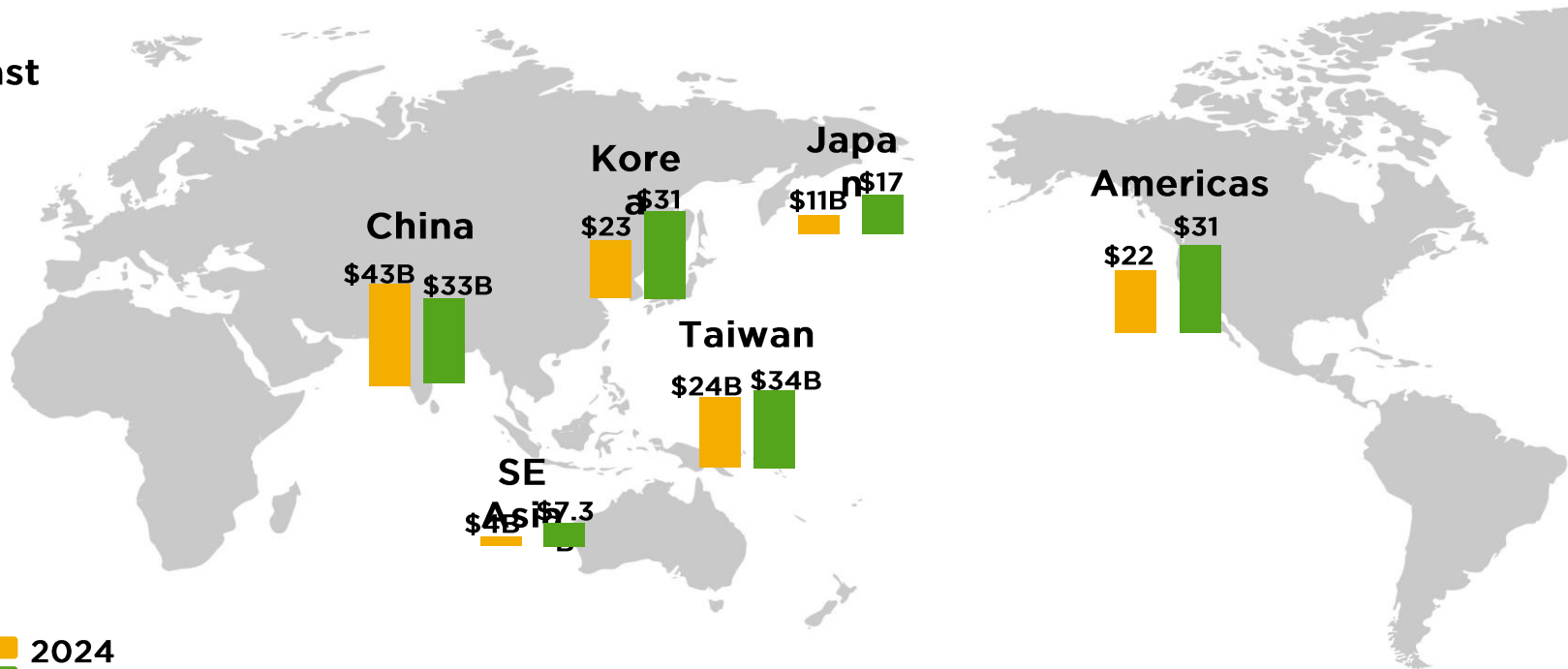


Semiconductor Fab Investment (Equipment and Construction spending)

Europe & Mideast

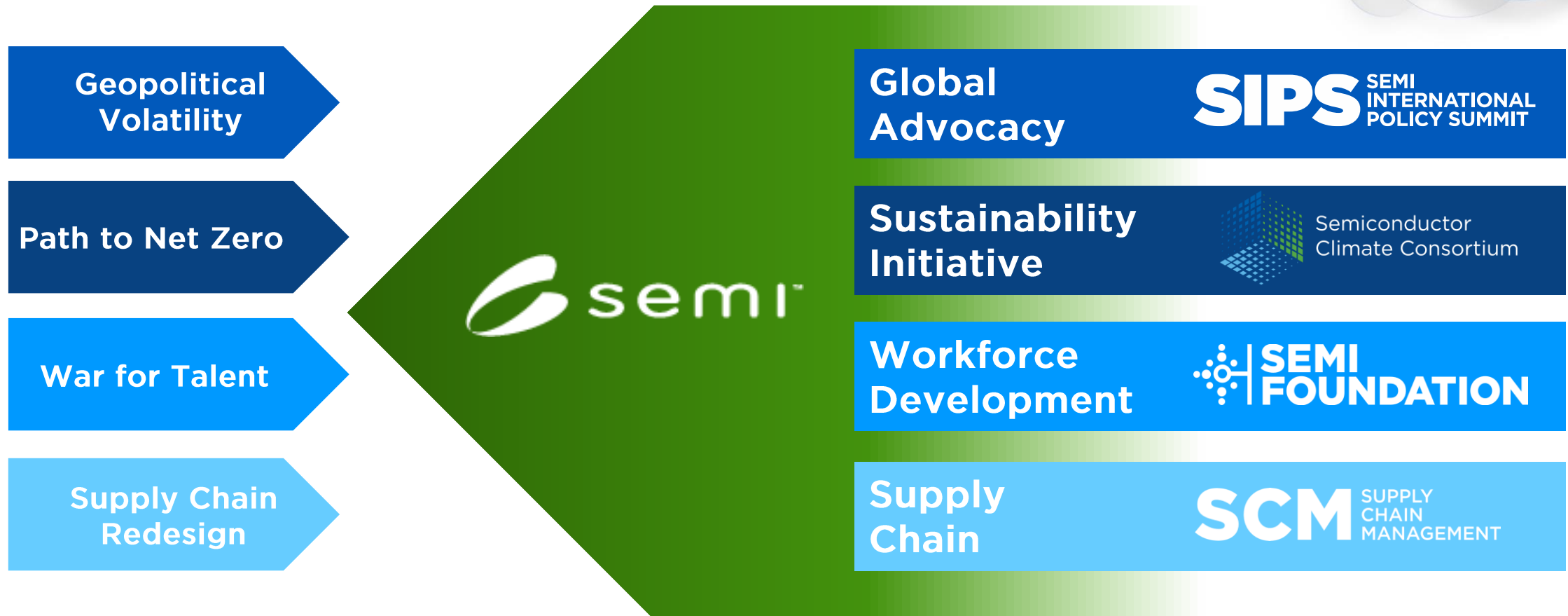
\$9.1B 2024
\$16.1B 2027

2024
2027





We Must Face Challenges on the Path to \$1T Head-on



SIPS is a unique platform strengthening global alignment on geopolitical concerns across industry, government, academia, and civil society

Summits gather top Industry Execs, Academia and Government Officials from key regions

- Next SIPS on Dec. 10 in Tokyo before SEMICON Japan 2024
- SIPS Singapore planned for May 21 during SEMICON SEA 2025

Summit Focuses: Talent, PFAS Regulations and Climate

SEMI 2025 Priorities and Focus



Driving near-term solutions for long-term industry growth

- Industry outlook remains robust; focused on speeding path to \$1T
- Prioritizing strategic programs to address serious global risks **with urgency and focus**

Unprecedented actions for unprecedented challenges

- Global Advocacy to navigate intensifying geopolitical tensions
- SIPS platform providing vital guidance to fine-tune SEMI programs
- Scaling Workforce Development initiatives
- SCC / Energy Collaborative identifying high-impact renewable energy solutions
- Standards underway for **Cybersecurity, Traceability and Risk Management**
- Enhanced focus on III V, Photonics and Advanced Packaging/HIR



Collaboration is Crucial to Advance the Industry

- **SEMI is laser-focused on growth and top concerns**
 - Industry fundamentals remain strong – global economy is concerning
 - Geopolitical tensions and global risks continue
 - Ukraine/Mideast wars, talent gap, climate change and supply chain disruptions, etc.
- **Collaborate with SEMI on our strategic initiatives to help the industry innovate and achieve sustainable exponential growth:**
 - **Global Advocacy** to navigate intensifying geopolitical tensions
 - **Workforce Development** to narrow the talent gap
 - **Sustainability Initiative and SCC** to drive sustainable growth and the path to Net Zero
 - **Supply Chain Management Initiative** for a robust redesign and to maximize growth

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Thank You!

**Wishing you a great
SEMICON Europa
2024**