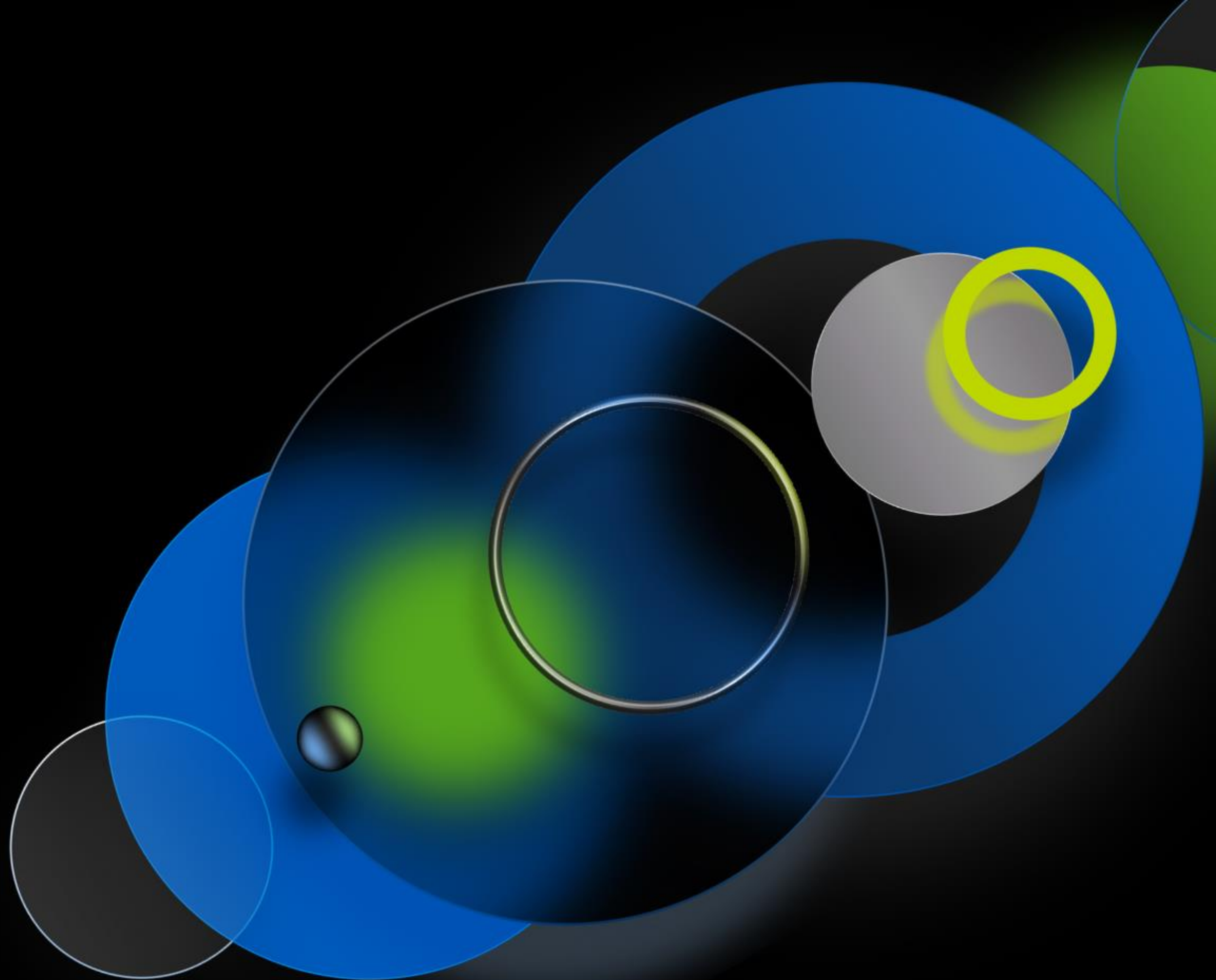




**Celebrating 50 Years
of Innovation and Brilliance!**



Opening Remarks Ajit Manocha President and CEO





**Celebrating 50 Years
of Innovation and Brilliance!**



Global Collaborations for Economic Resilience

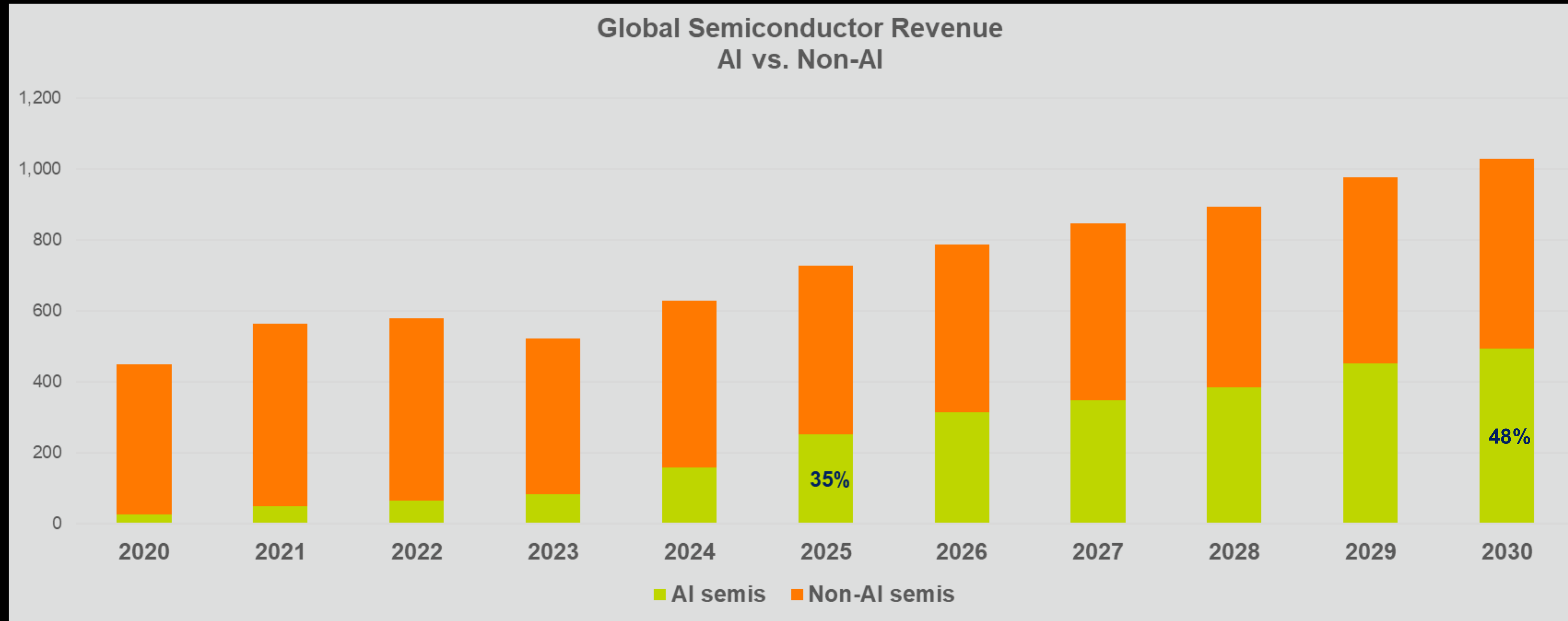
SEMICON Europa
November 18, 2025

Ajit Manocha, President & CEO, SEMI

CONNECT - COLLABORATE - INNOVATE - GROW - PROSPER

AI Semiconductor Surge: A \$1T+ Market by 2030

2020 - 2030 Revenue Trajectory and Segment Shifts



Sources: SEMI, Morgan Stanley

Investments in New Fabs Support AI Boom

107 New Fabs Coming Online through 2028 – **91** in progress

30+ Additional fabs still needed through 2030



AI Extending Beyond the Data Center

Inference Scaling Across Cloud to Edge to Client



Hyperscaler Datacenters

Centralized computing for large-scale AI processing and data storage



Edge & Cloud Datacenters

Processing data locally, near its source, enables real-time decision-making and reduces latency for applications



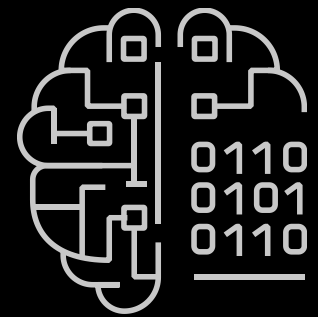
Client: Autonomous & Mobile Applications

Running AI apps directly on user devices with personalized, responsive experiences and enhanced data privacy



AI's impact will extend to Quantum and Humanoid Robots

The Intersection of AI and Quantum Computing

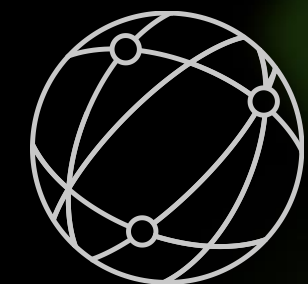


AI Accelerating Quantum:

Examples today of AI integrated into quantum hardware design, control, algorithms and quantum error correction.

Quantum Accelerating AI:

Quantum could reduce energy-to-solution of AI workloads with future data-centers and HPC infrastructure incorporating “traditional” chips, photonics, and quantum architectures.



Source: UCLA

Coming to a Fab Near You: Humanoid Robots

13M robots among us by 2035,
growing to **1B** by 2050

— Morgan Stanley

Optimus serial prototype – early **2026**;
large scale manufacturing – **2026** end

— Elon Musk

“We’re working towards a day where
there will be **billions** of robots...”

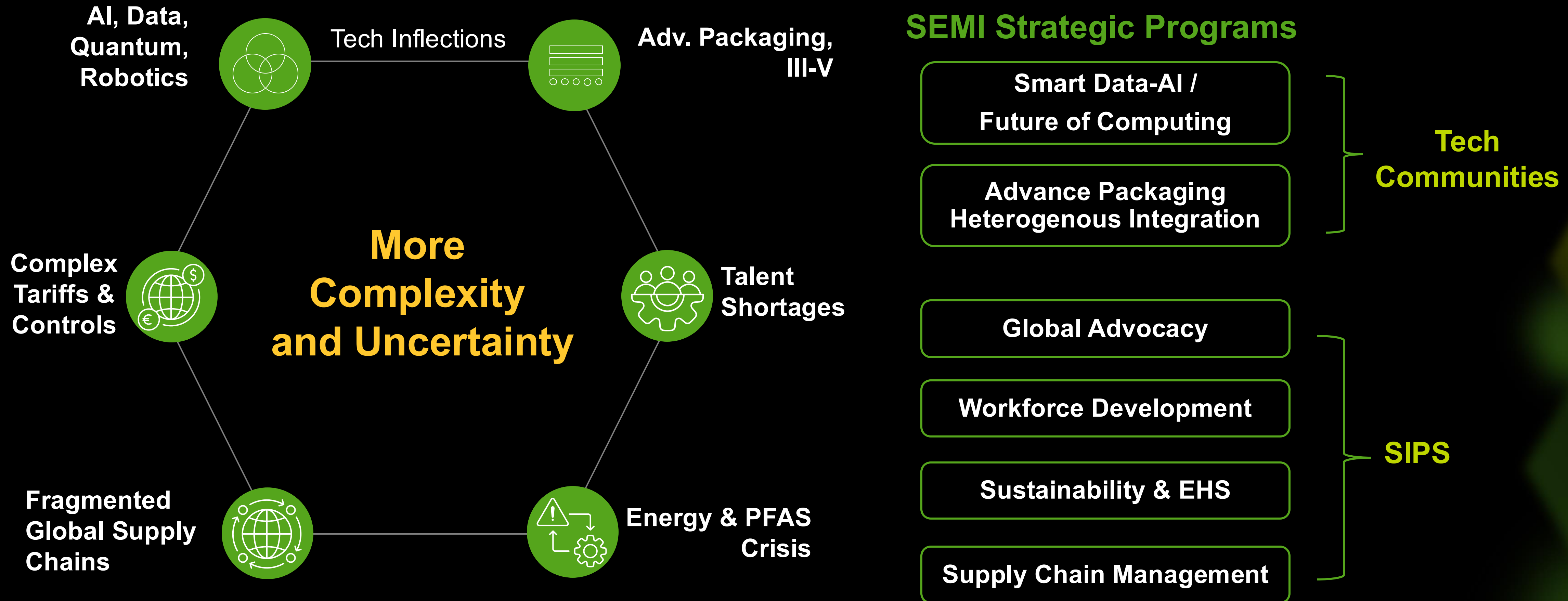
— Jensen Huang



Source: Intel

Amidst Unprecedented Growth Opportunities, We Face Unprecedented Uncertainties

SEMI is Delivering Unprecedented Solutions



SEMI Global Advocacy Principles

Policy Initiatives

4Ts + EHS

Tax – Level playing field

Technology – Public and private R&D investment

Trade – Free & fair trade

Talent – Highly skilled talent & immigration policies

EHS – Meaningful global regulations

4 Trade Pillars

Open Global Markets and Fair Competition

Global Supply Chain Efficiency

Strong IP Protection

Multilateral approach to trade restrictions

Global Trade Principles

Ensure national security controls on commercial tech are narrowly tailored to specific security concerns and implemented multilaterally

Remove tariffs and technical barriers on semiconductor equipment, materials and products; ensure non-discriminatory market access

Enable free flow of secured cross-border data; eliminate forced localization measures and customs duties on electronic transmissions

Harmonize global standards: “one standard, one test, accepted everywhere”

Simplify and harmonize customs and trade facilitation processes; global implementation of processes

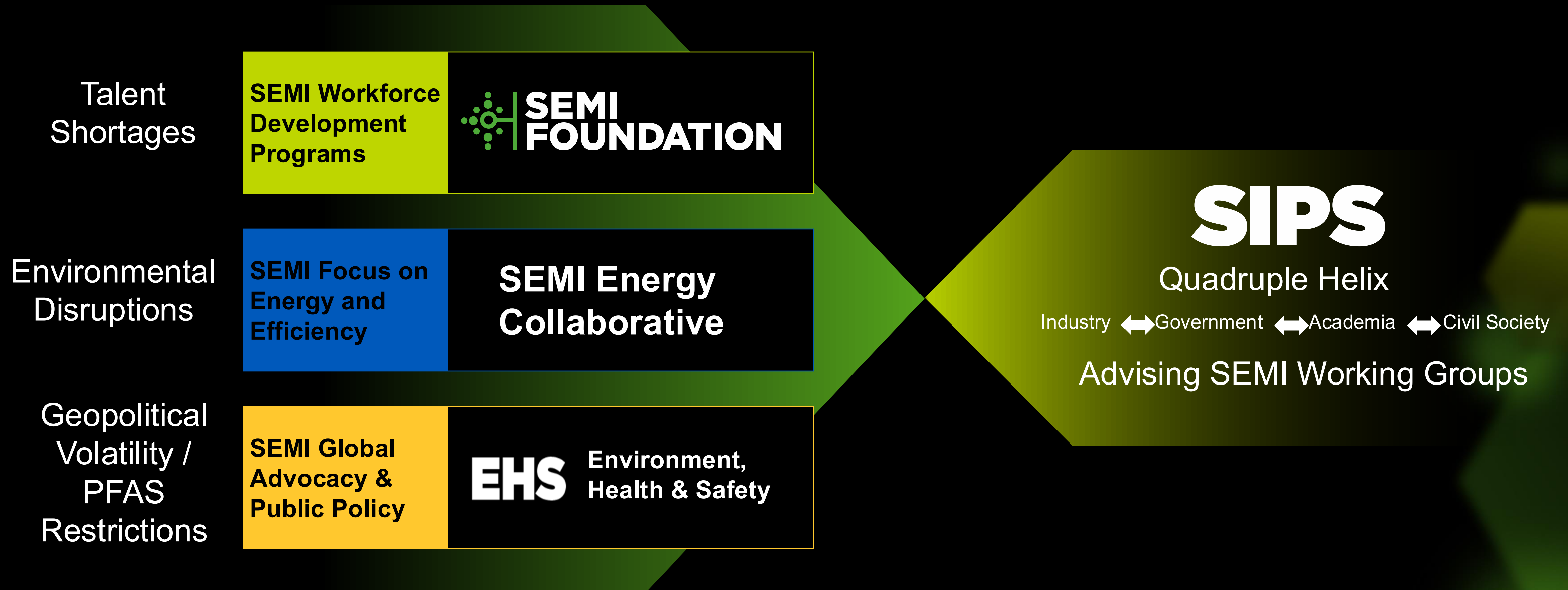
Oppose forced technology transfers and IP theft

Support efforts that reinforce IP protections and scalable, globally-harmonized, standards-based security policies and national cybersecurity

Create transparent rules for state-owned and supported enterprises to ensure fair competition and non-discriminatory treatment globally

SEMI International Policy Summit (SIPS)

Focused On What We Can Control

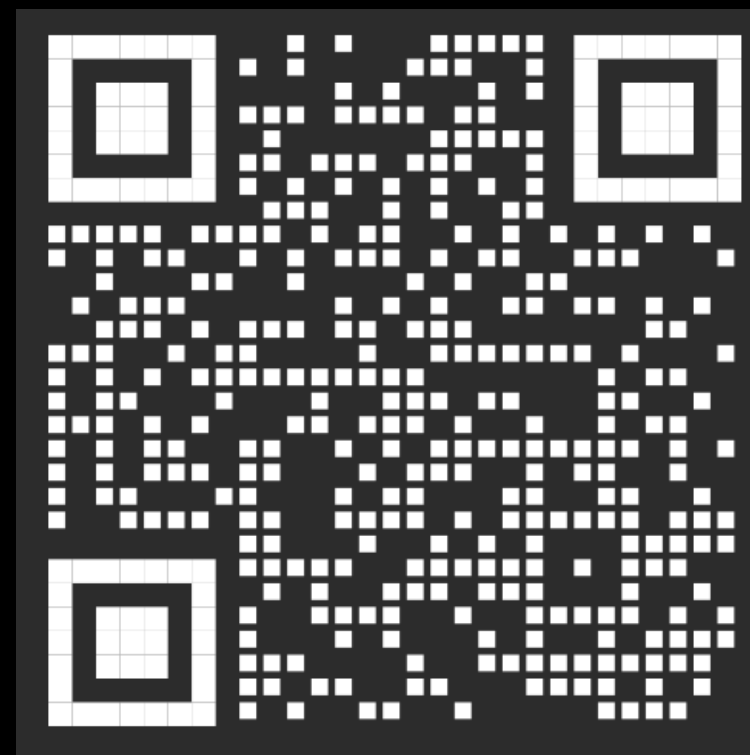


SIPS SEMI INTERNATIONAL POLICY SUMMIT

3 Historic Summits:

- Inaugural SIPS at ITPC – Oct. 2023
- SIPS Brussels – Mar. 2024
- SIPS Tokyo – Dec. 2024

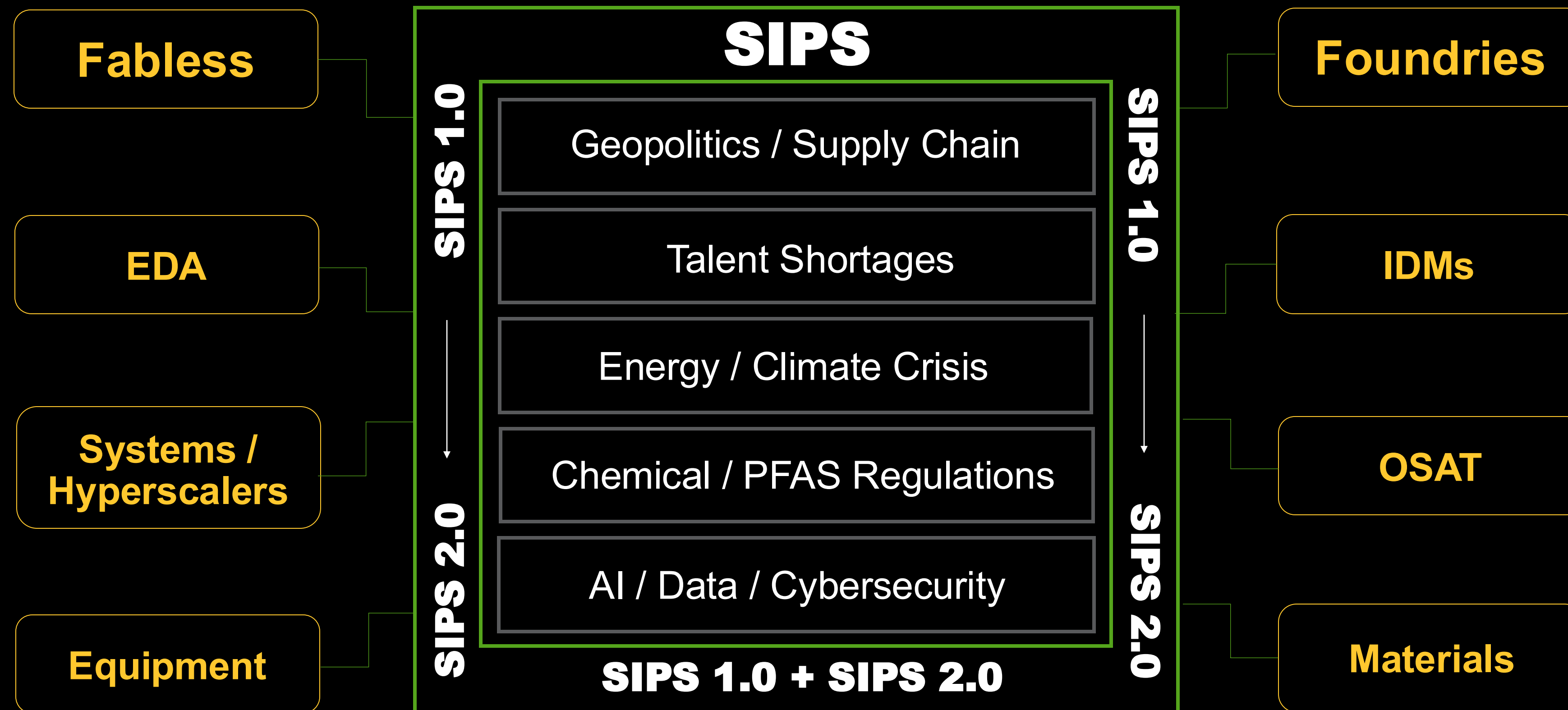
4th SIPS in Singapore – December 11-12, 2025



Learn More About
the SIPS Platform

SIPS 2.0

Enhancing SIPS Platform to Address Emerging Challenges



Global Executive Summit (GES) on Energy, Emissions and Efficiency

December 15-16, 2025, in Tokyo, co-hosted by Google

The Summit will forge an actionable plan for global industry collaboration in four focus areas:

- Abatement
- Replacement Gases
- Green Materials and
- Renewable/Low Carbon Energy

Your organization can share its interest in participating in GES here:



Leads into SEMICON Japan 2025 on December 17-19

Takeaways for Europe to 2030

Step Up to Regain Your Leadership Positions

- ➔ EU Chips Act 2.0 – Scale up investment and speed of implementation for more fabs
 - Leverage AI and Quantum enabled growth
 - Scale up investment in Workforce Development and AI Chip Design
- ➔ Leadership on Compound Semiconductors and Photonics
- ➔ Powerhouse on Advanced Packaging
- ➔ Leverage climate leadership to drive solutions on energy crisis
- ➔ Exploit convergence of semiconductors with MedTech
- ➔ Rising geopolitical issues – focus on what we can control and execute on strategy
- ➔ ...

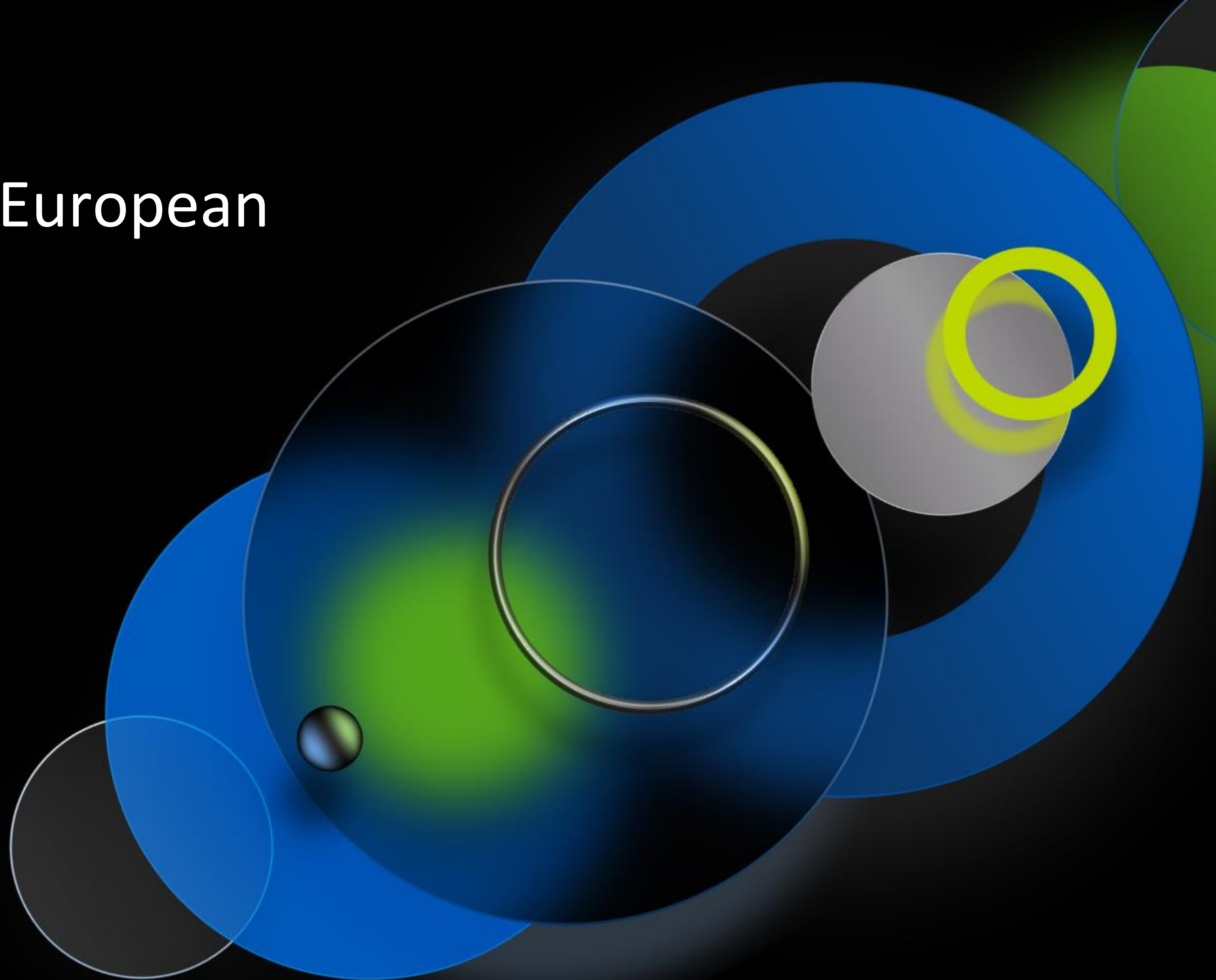


Thank You

Global Collaborations for European Economic Resilience



Welcome Remarks
Laith Altimime
President, SEMI Europe

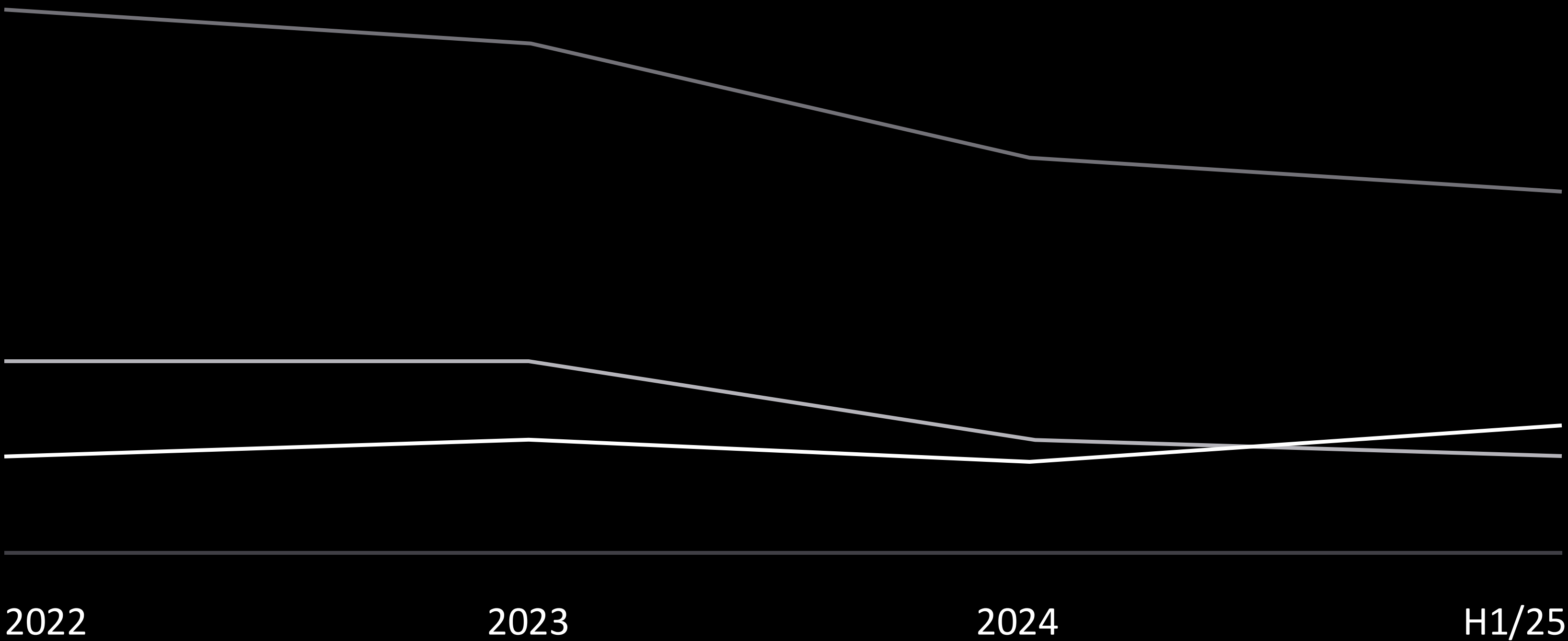




Europe in the Perfect Storm

Profitability across European automotive OEMs and suppliers facing strong headwinds

EBIT margin



European players need to collaborate to match Cost and Speed

- 18.6 % Hybrid IDMs
- 5.2 % Tier 1 suppliers (automotive electronics)
- 5.0 % Automotive OEMs



“The 2035 target is not just environmental policy, it is an industrial strategy.”

Ursula von der Leyen
President European Commission



Pending Sovereignty

Additional chip cost
per vehicle due to tariffs

188 \$
+16 %

EV market share

Current BEV share of
passenger car sales

15.6 %
100 %¹
2035 target

New Competitors

Current market share of
Chinese OEMs

5.1 %
2.7 %
vs H1/24



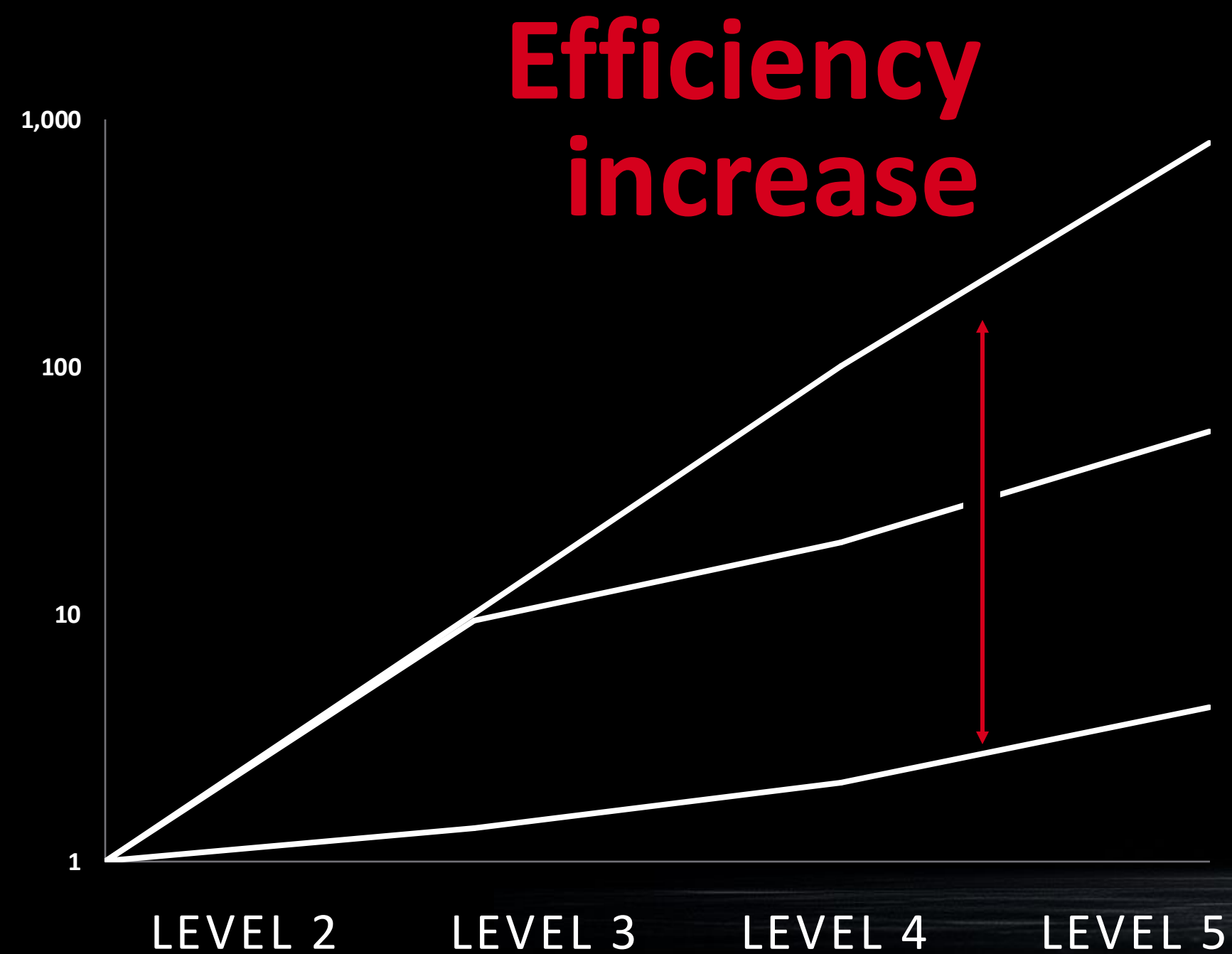
**Geopolitical
Shift**

**Behind
Expectations**

**Price
Pressure**

1 According to analyses related to the EU climate targets ("55% CO₂ reduction by 2030; 100% by 2035")
Source: Porsche Consulting, electrive, T-Systems, S&P

With the rise of autonomous driving the electronics supply chain in Europe will face demand surges



Compute demand
x 800

Memory demand
x 55

Power demand
x 4.2



Situation in Europe

22 nm

Current Node size limitation on the European continent

0

Leading memory providers in Europe enabling HBM4

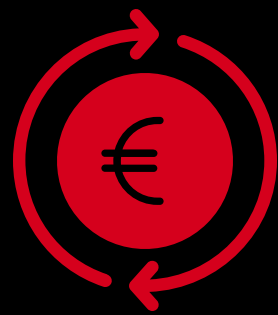
>40 %

Price delta for SiC 8" raw wafer compared to Chinese players



Only with close collaboration the
challenges can be mastered for
European Sovereignty

Industry way forward



Joint Investments and Fab Projects

- Demand Guarantees
- Data Center Capacity



Quality Standards and Mission Profiles

- GAAC | Lean Specification
- Zonal Architectures



Long-term R&D Partnerships

- AI design platforms
- Advanced packages

Challenges to overcome



White spots in souverain supply chain

- AI Chip Design | Memory
- Advanced Packaging



Non-Competitive location factors

- Energy Prices | Bureaucracy
- Skilled Labor



Private and Public Funding Gap

- Start-up Funding
- Research Projects

Europe's Microelectronics Ecosystem

European
Excellence



Semiconductor
Research

Semiconductor for Automotive,
IOT, MS/
RF, Sensors, Power

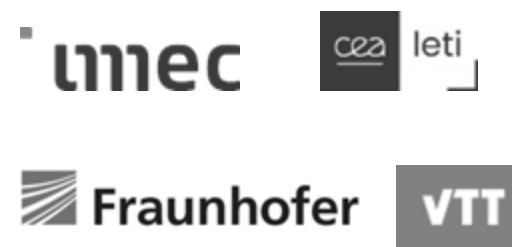


Lithography Equipment &
Materials

Mobile Network
Equipment



RTOS



SUPPLIERS



DESIGN & MANUFACTURING



Recent Investments in Europe - Germany

- **ESMC** Joint Venture (TSMC, Bosch, Infineon, NXP) plans to invest over €10B fab in Dresden
- **Infineon** investing €4.46B to expand its Dresden operations



GlobalFoundries to spend €1.1B to double production at its chip fab in Dresden over the next few years



Recent Investments in Europe

Italy

- **STMicroelectronics** plans to invest €5B in the world's first SiC chip fab in Catania
- **Silicon Box** is setting up a €3.2B advanced packaging plant in Novara
- **NXP** secured a €1B EIB loan to support R&D in multiple EU countries
- **Onsemi** is planning a \$2B (~€1.9B) expansion in Czech Republic
- Photon Delta secured €1.2B



Recent Investments in Europe



NOKIA

NVIDIA to Invest \$1B in Nokia to Accelerate AI-RAN Innovation and Lead Transition from 5G to 6G

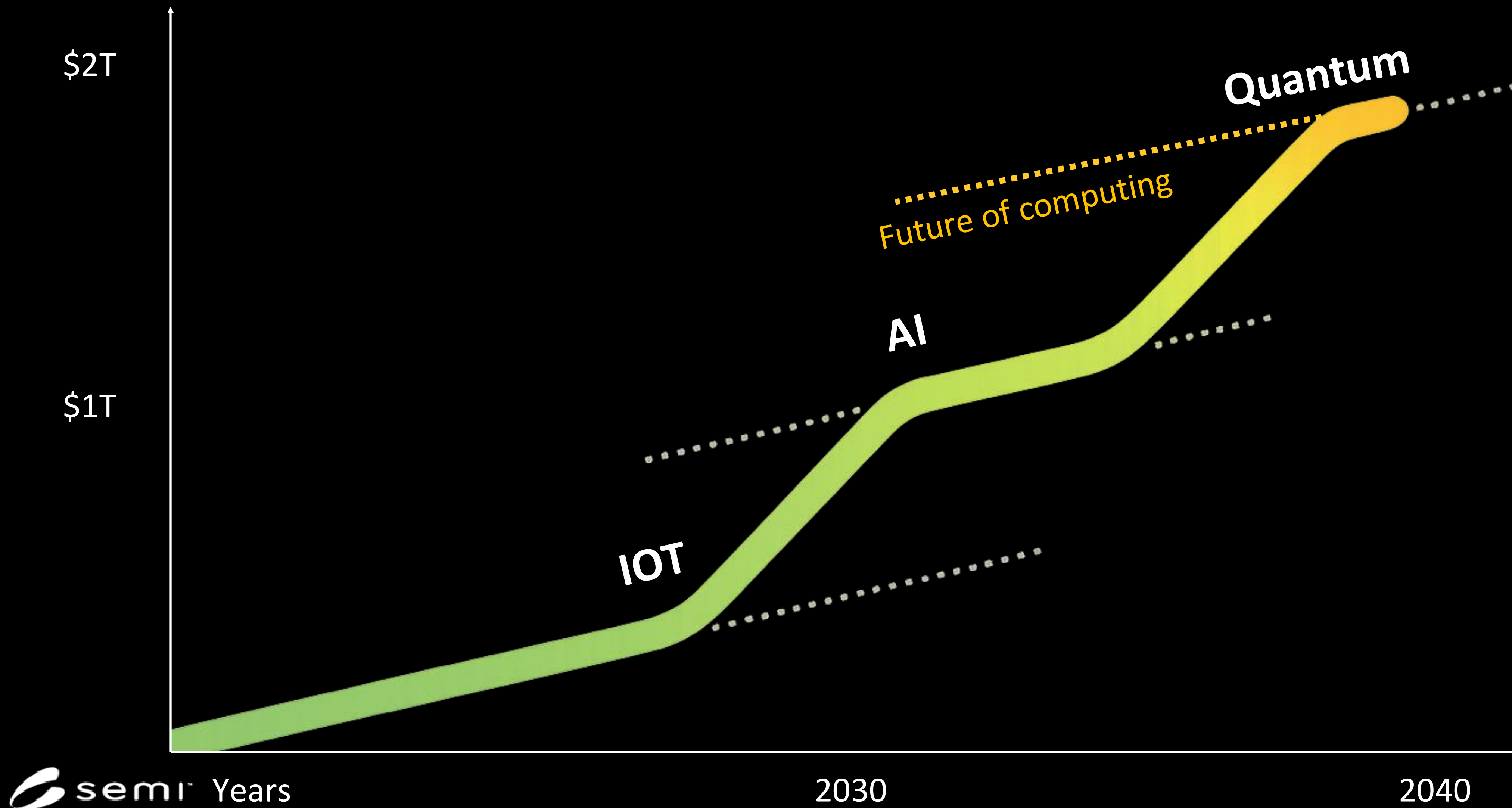
ASML

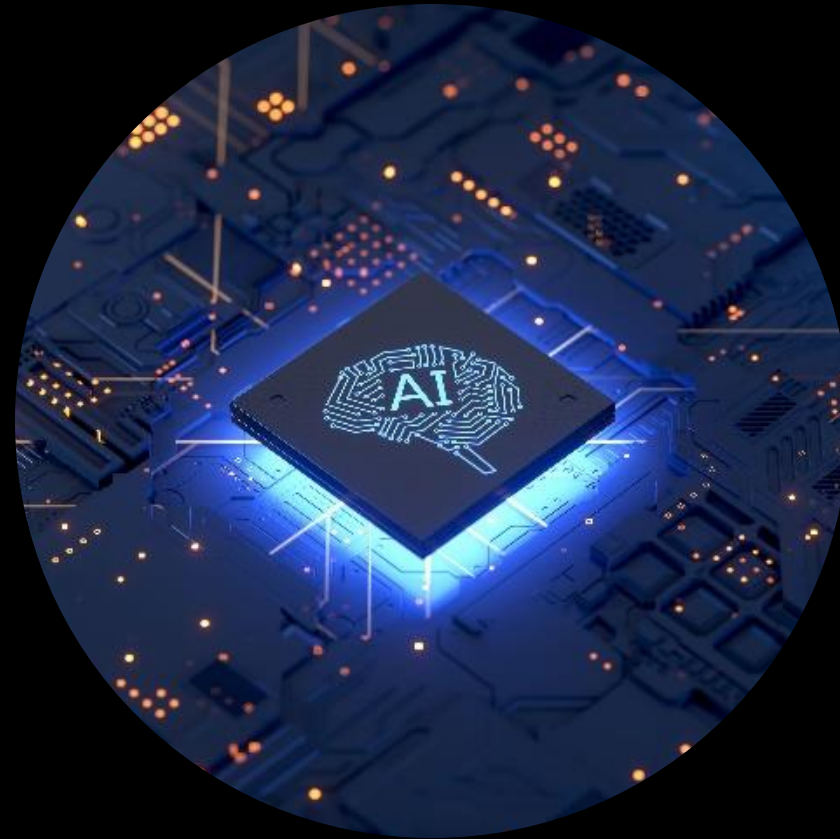


ASML is investing € 1.3B in Mistral AI to strengthen European tech sovereignty



Unprecedented Semiconductor Industry Growth





Artificial
Intelligence



Sustainability &
Decarbonization



Geopolitical
Tensions & Resilience



War for
Talent

UNPRECEDENTED
GLOBAL CHALLENGES TO

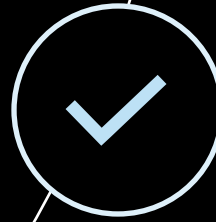
\$1tn



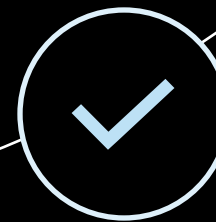
GEOPOLITICS



TALENT SHORTAGE



CLIMATE CHANGE



SUPPLY CHAIN DISRUPTIONS

UNPRECEDENTED
SEMI
ACTIONS



GEOPOLITICS
SEMI INTERNATIONAL POLICY SUMMIT (SIPS)



TALENT SHORTAGE
WORK FORCE DEVELOPMENT INITIATIVES

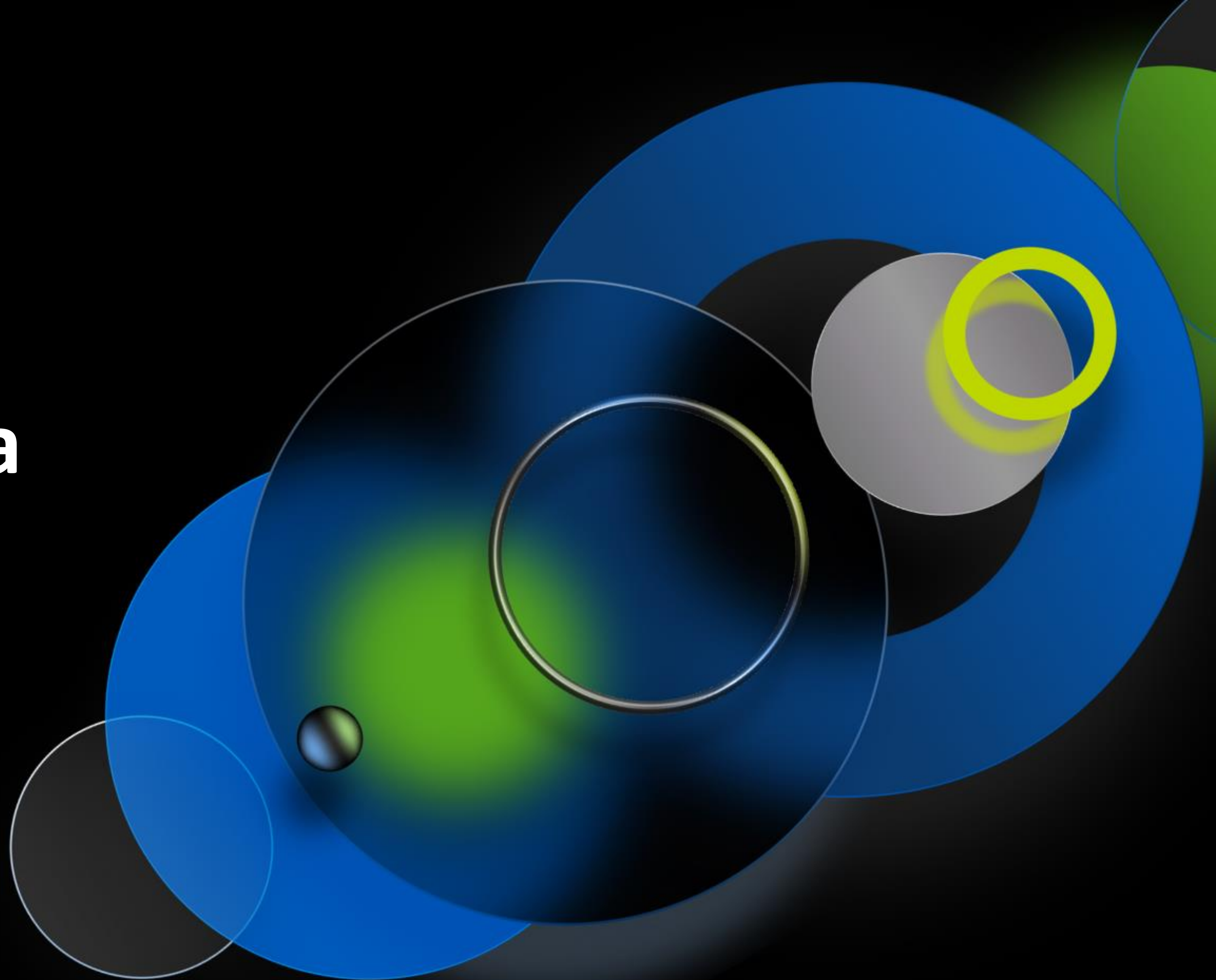


CLIMATE CHANGE
SEMICONDUCTOR CLIMATE CONSORTIUM (SCC)



SUPPLY CHAIN DISRUPTIONS
SUPPLY CHAIN MANAGEMENT (SCM)

SEMICON Europa Highlights



Strategic Partnership

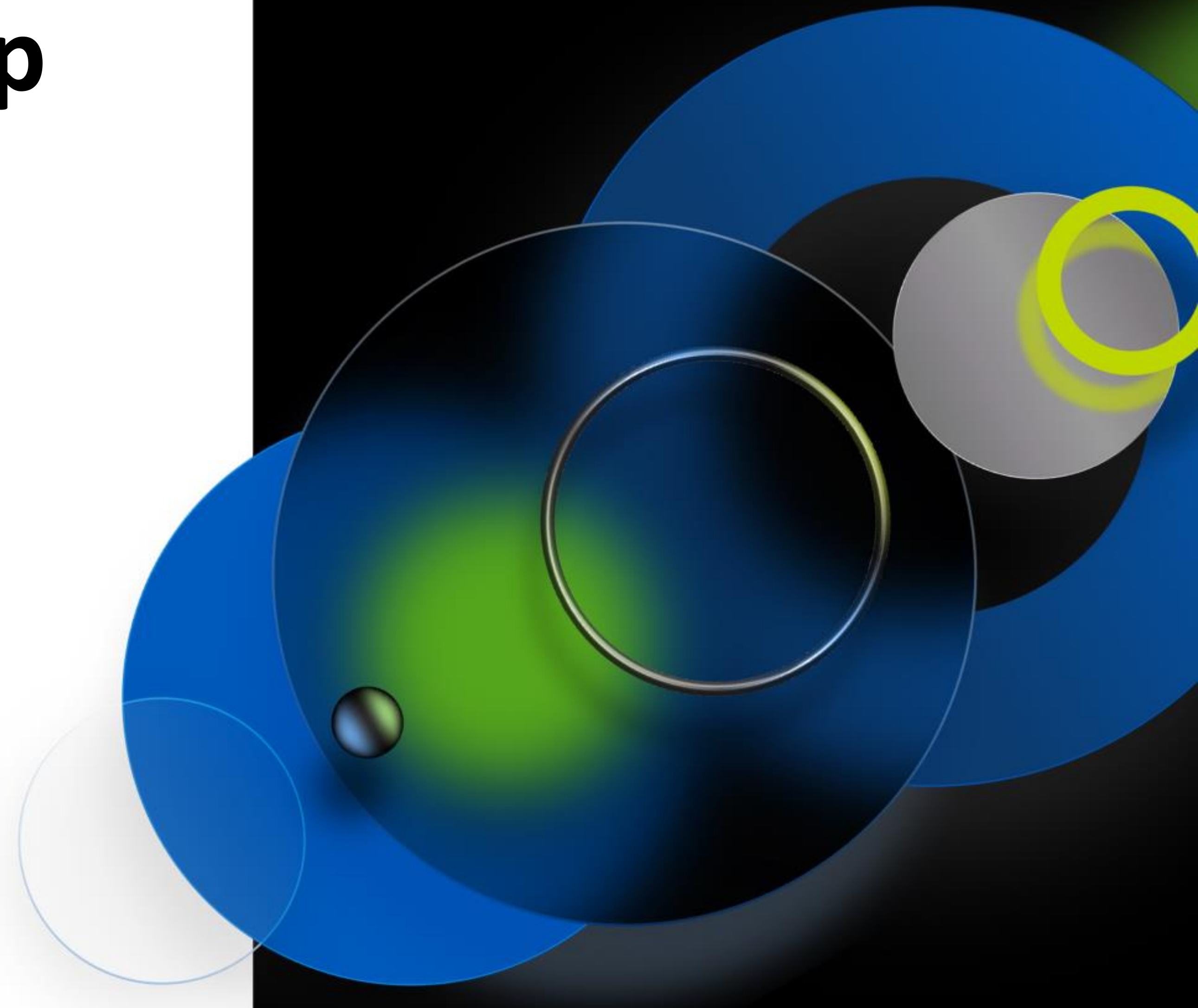
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Messe München



CxO Summit Speakers



Pierre Chastanet
Head of the Unit for
Microelectronics and
Photonics



Luc Van den hove
President & CEO
imec



Herbert Blaschitz
Executive VP, ATF



Henri Berthe
President,
Semiconductor and
Battery Segment



Christian Koitzsch
President and
Managing Director



André Grede
CTO



Christophe Maleville
CTO



Sébastien Dauvé
CEO



Narjiss Haddaoui
Managing Director



Oliver Schenk
Member of the
European
Parliament



Joerg Schulze
Spokesperson for the
Bavarian Chips Alliance,
Director



Terence Gan
Executive Director



Manfred Horstmann
General Manager and
SVP



Fabio Gualandris
President Quality,
Manufacturing &
Technology



Anne Hidma
Senior Vice President
EUR & US



Christophe Frey
Vice-President of
EU Engagements



Tuomas Korpela
Business Development
Senior Manager,
Corporate Development
Organization



Christian Senger
Member of the Board
for Fully
Autonomous Mobility
and Transport &
CEO



ITF Chip into the
FUTURE

AT

**SEMICON
EUROPA**

Connecting **innovation** to **impact**

November 19, 2025 • Munich, Germany



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Innovation Journey to the Past

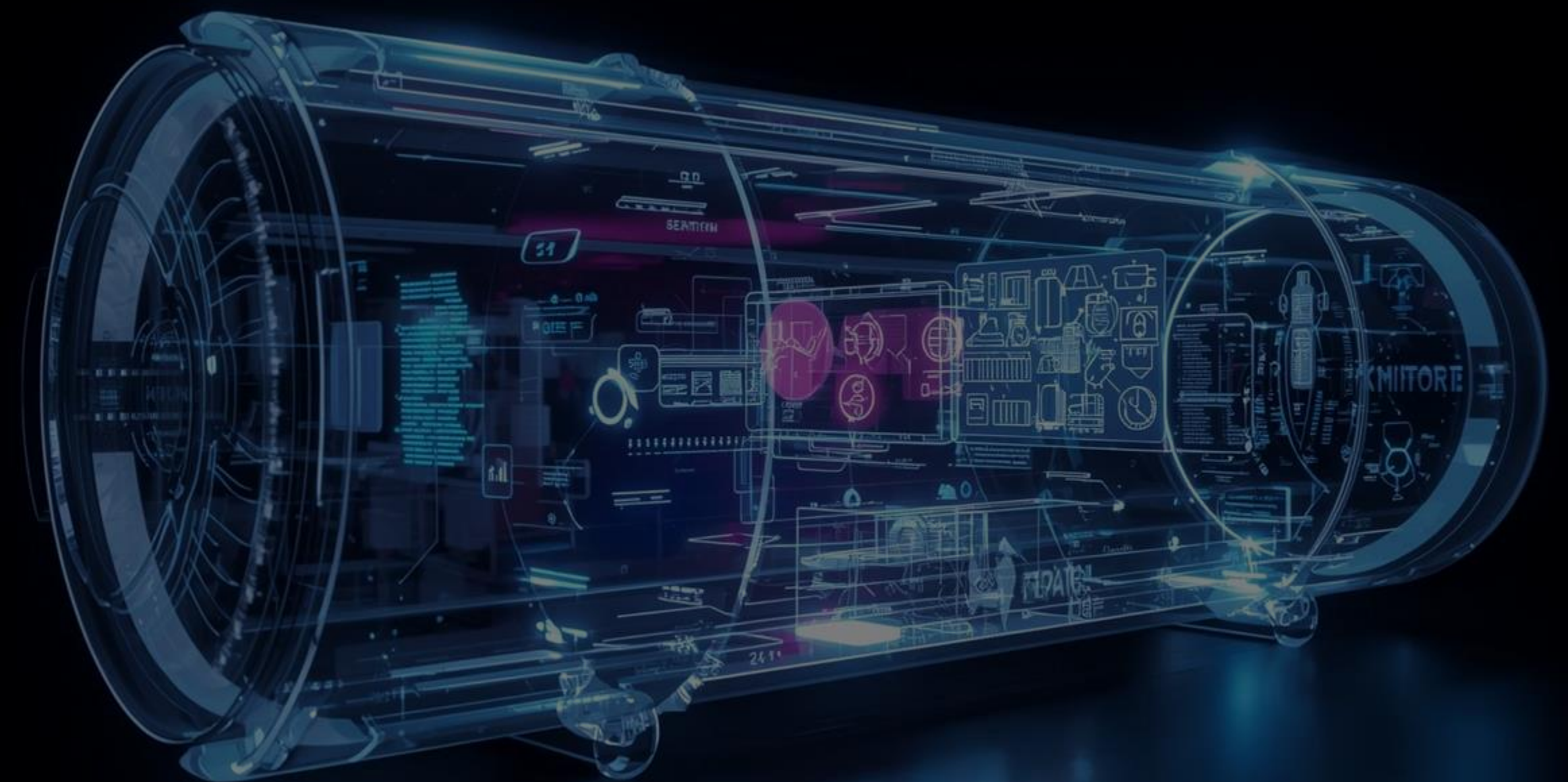
An immersive showcase of technology and play,
featuring vintage devices.

Discover the evolution of the technologies that have
shaped the way we live, work, and connect.

50 Years Forward Time Capsule

Share your vision for the future of our industry!

Add your voice to a collection of ideas about the trends, challenges, and breakthroughs that will shape the way we live and work.



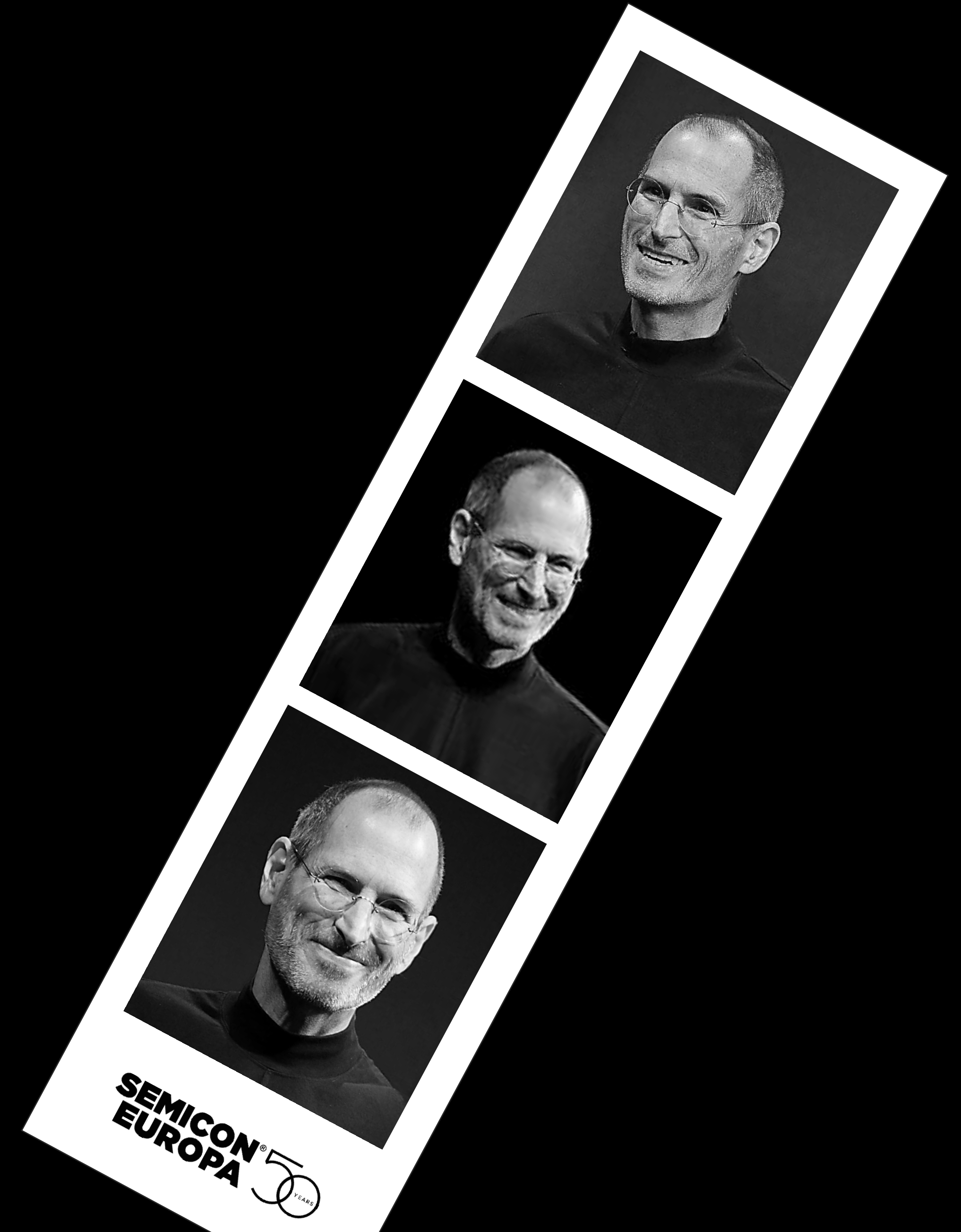
Golden Moments Studio

Celebrate 50 years of SEMICON Europa at our anniversary photo booth.

Gather your friends and colleagues, strike a pose, and record a special moment from this milestone event.

#SemiconEuropa50

#50YearsForwardTogether



Pixels & Popcorn Theater

A photograph of a movie theater interior, showing the backs of an audience seated in rows, looking towards a large screen. The screen is framed by a border of glowing yellow lights. The text is overlaid on the screen area.

Step inside the playful retro-inspired theater
that blends nostalgia with innovation.

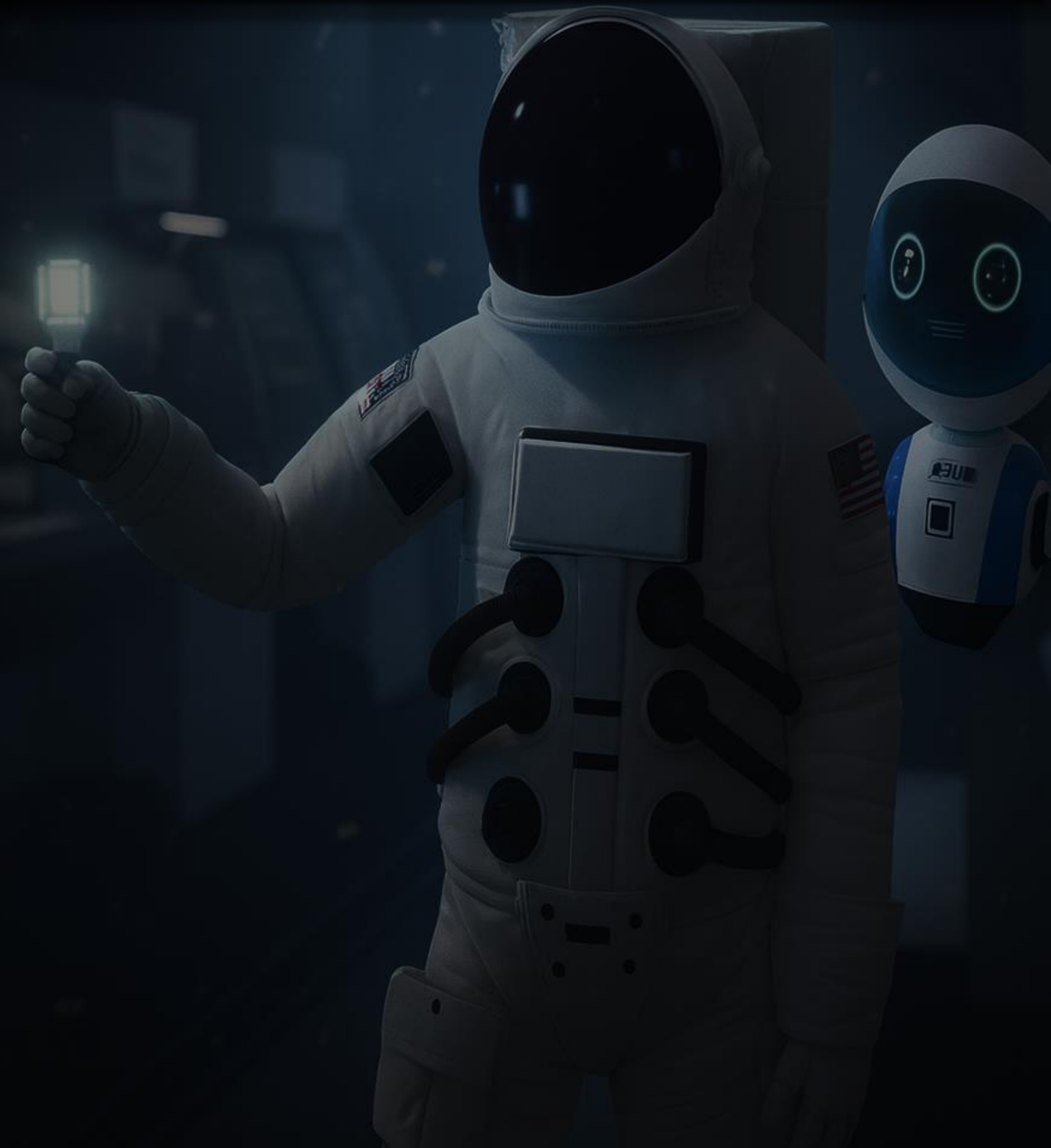
Featuring twice daily showings of classic
technology-focused films.

Future Fab Heroes

Explore the people powering tomorrow's fabs!

Step into the world of Future Fab Heroes and discover inspiring stories from the semiconductor workforce.

It's engaging, educational, and all about the innovators shaping the industry's future.



SEMI Startup Showcase



ACCIOSONIC



black
semiconductor



Cyb@rEcoCul



excillum



FaradaIC®

FononTech

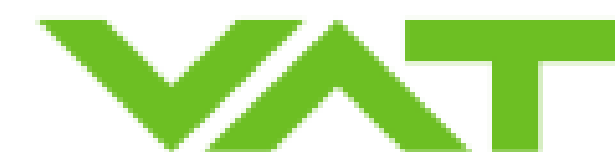
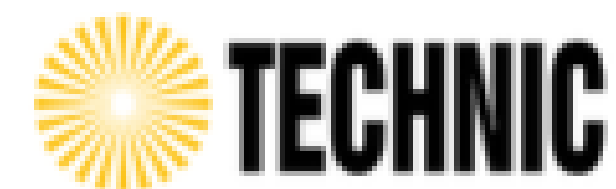
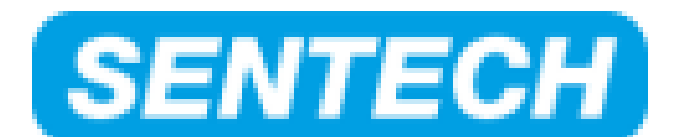
ignite
next



pointcloud



SEMICON Europa Legacy Exhibitors



SEMI Global Exhibitors





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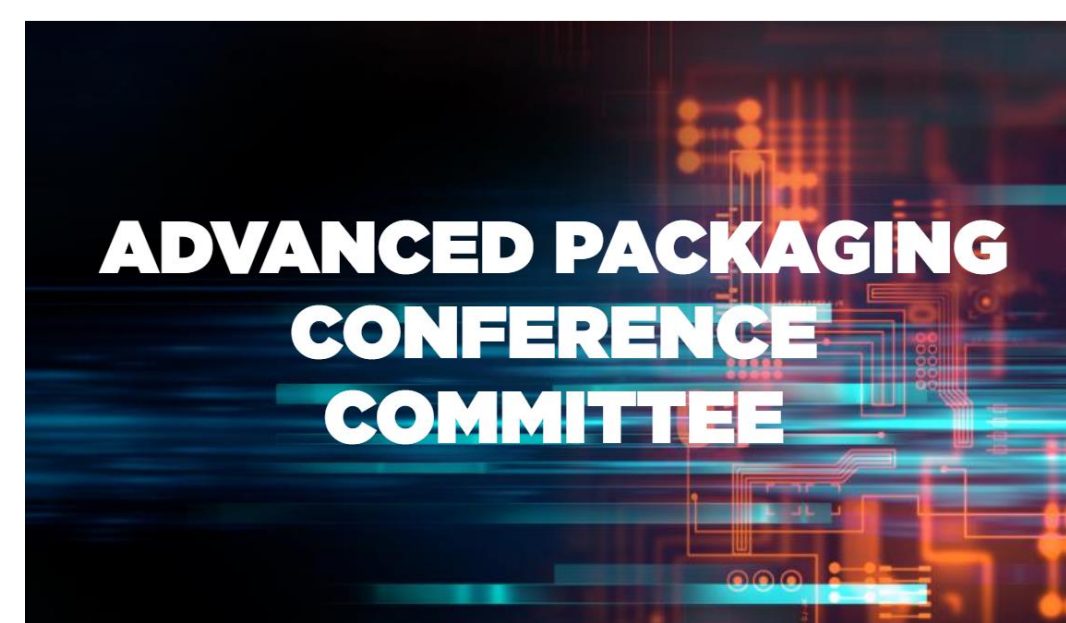
Headline



Event Sponsors



Committee Members



Meet the SEMIs
Thursday, Nov 20 | 5:30 pm

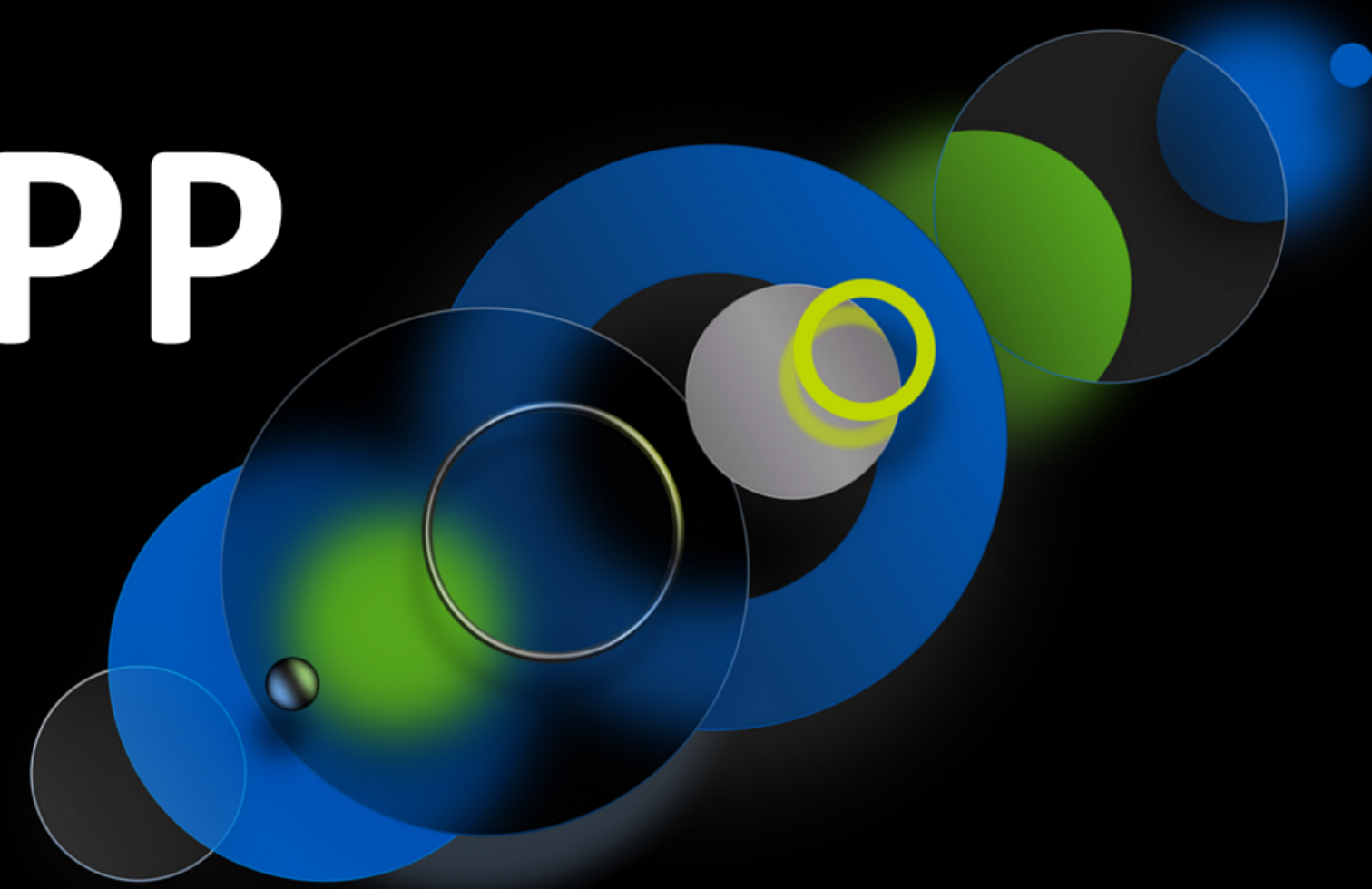


Media Partners





EVENT APP



- Scan the QR Code to download the Attendee Mobile App.
- Open the App, tap "Scan", and scan this QR code again to access event details. Alternatively, you can search for the event with "SEMICON Europa 2025"

Internal Challenges, External Competition

Collaboration is Mission Critical

Wishing you an inspiring
SEMICON Europa 2025!

