

Enabling the AI Future: Redefining Memory Through Collaboration and Talent

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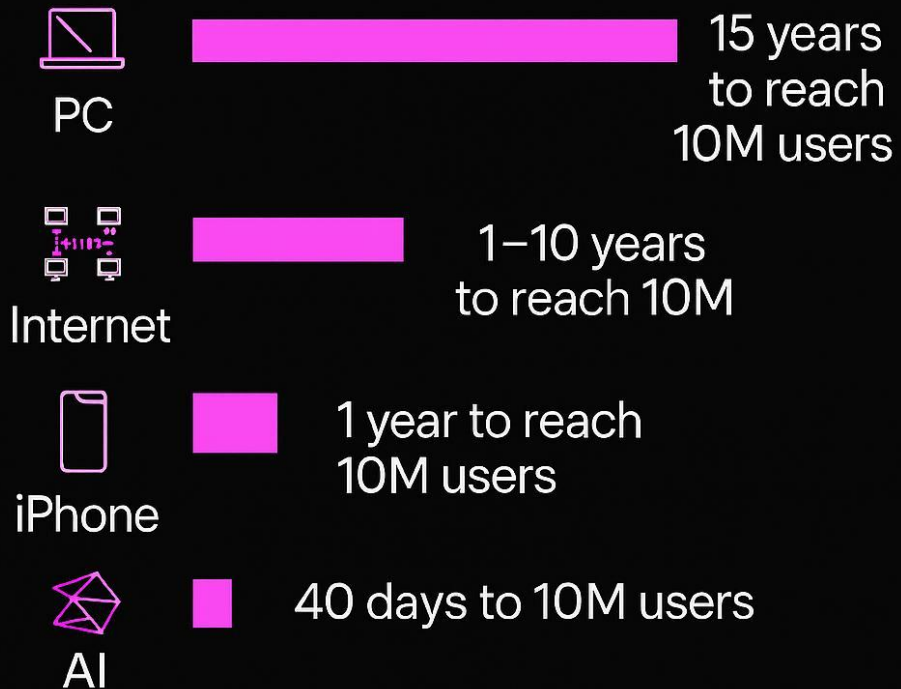
CVP, DRAM Asia Frontend Operations &
Head of Micron Taiwan



The Acceleration of AI and the New Strategic Landscape

This acceleration has reshaped how we think about manufacturing, technology, and collaboration.

The Pace of AI Adoption Has No Historical Precedent



AI is redefining the speed of innovation – and memory and storage sit at the heart of this transformation

Memory Super Cycle Fueled by AI

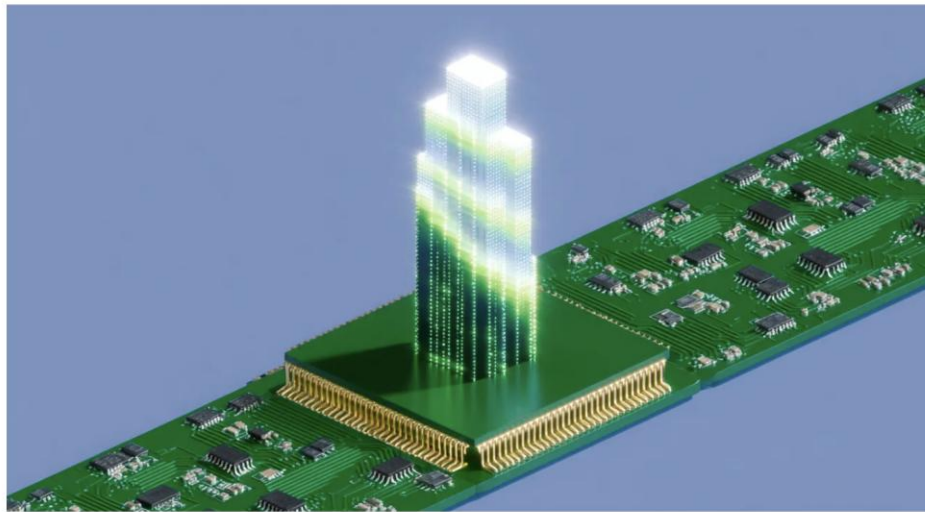
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Tech

AI Boom Pushes Memory Chip Market Into a Potential Decade-Long “Supercycle”



victorlei
October 17, 2025



The memory chip market — once plagued by its boom-and-bust cycles — is experiencing what might be its most promising era yet. With AI gobbling up every bit of data storage it can find and enterprise customers racing to upgrade their tech infrastructure, the sector is powering into what many insiders are already calling a decade-long “supercycle.”



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Siu Han, Taipei; Charlene Chen, DIGITIMES Asia

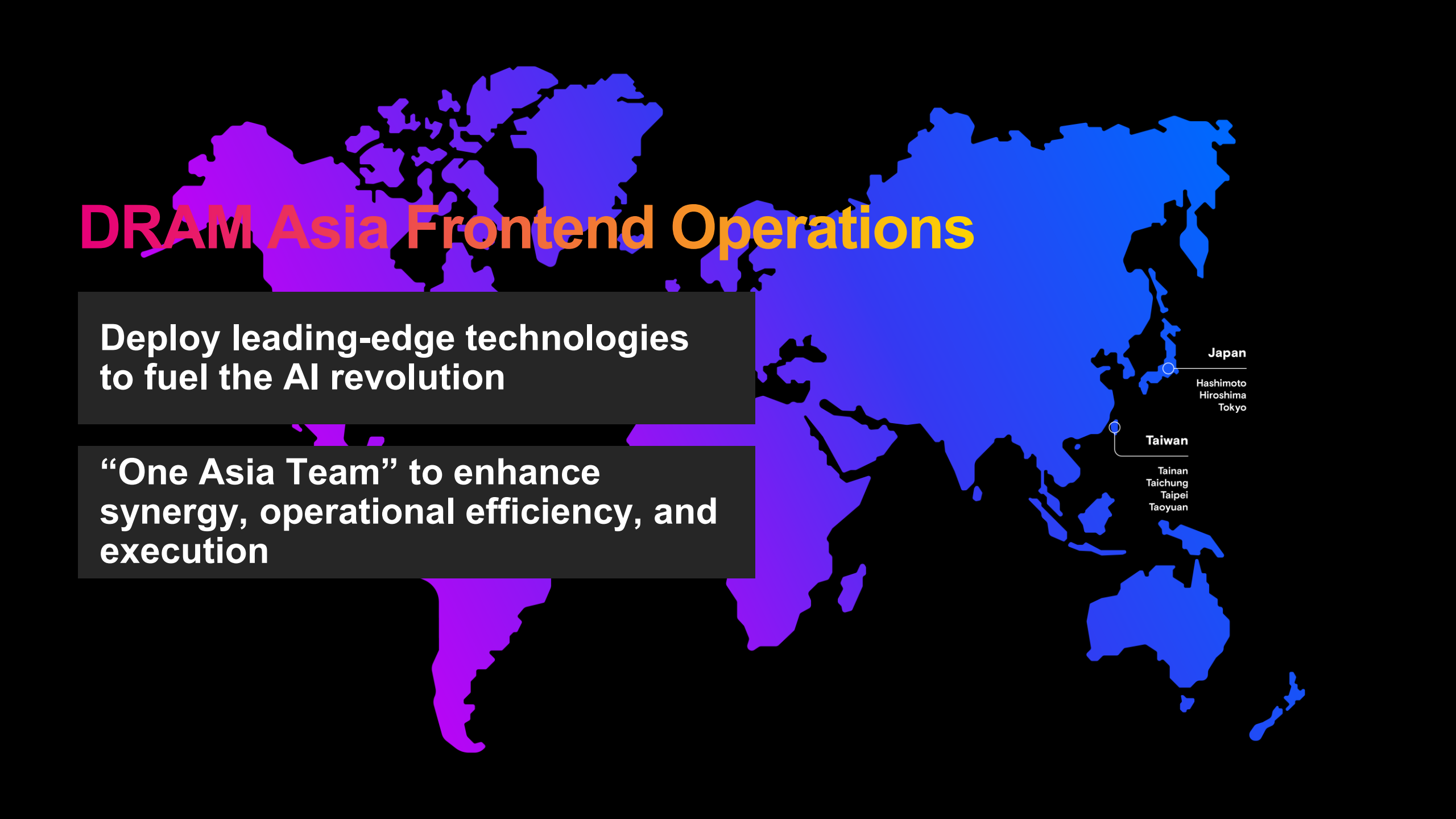
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DRAM Asia Frontend Operations



**Deploy leading-edge technologies
to fuel the AI revolution**

**“One Asia Team” to enhance
synergy, operational efficiency, and
execution**

Japan

Hashimoto
Hiroshima
Tokyo

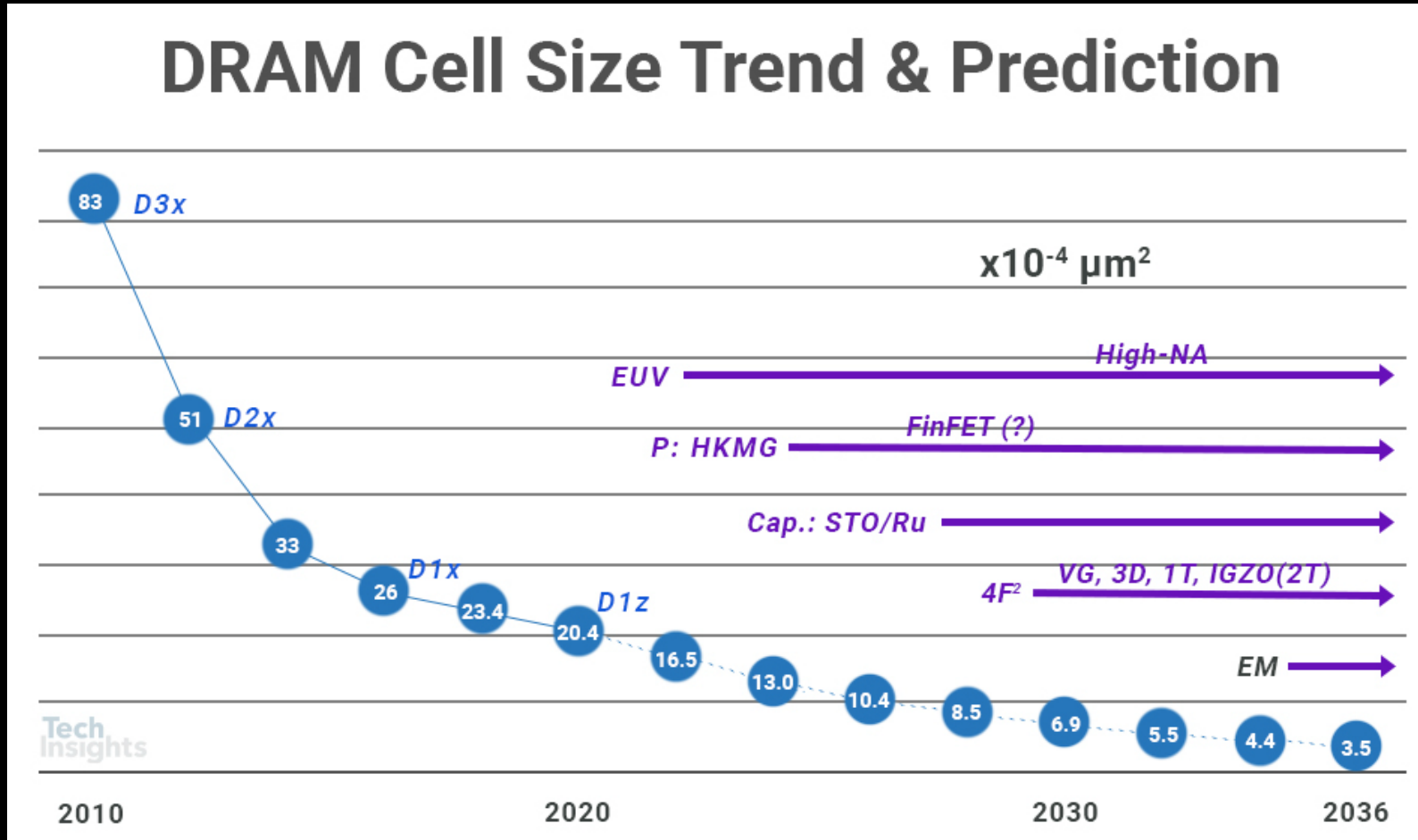
Taiwan

Tainan
Taichung
Taipei
Taoyuan



One Virtual Fab Connecting Taiwan and Japan

The “invisible whip” of Semiconductor Industry



- Knowledge has a shelf life
- Learning rate is currency
- Talent ever more critical
 - Learning accelerated through AI
 - “End of AI is math and physics”
 - Problem solving and creativity matters even more
- Cross function collaboration becomes the fundamental enabler
- Ecosystem partnership ever more critical

Partnership & People: Foundation to Enable the Success



Supplier Partnership

- We're evolving from transactional relationships to transparent, agile partnerships.
- Co-developing readiness for next-gen technologies such as HBM and advanced DRAM nodes.
- Aligning capability growth and sustainability goals across the supply chain

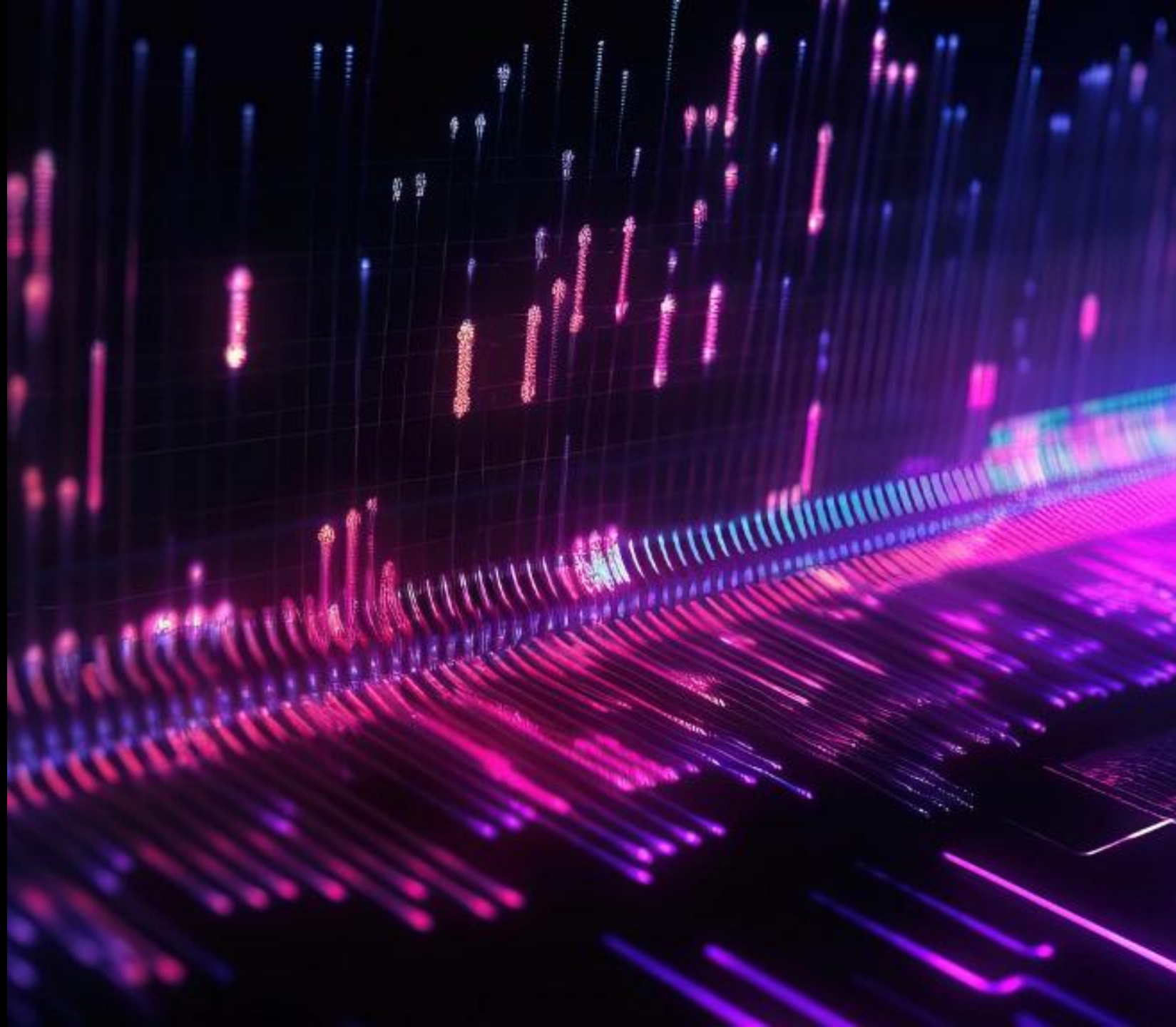


People Upskill

- Micron is now transforming as an AI-first company
- Physics, math and first principles thinking are fundamental skills
- Our industry knowledge has a shelf life, learning agility is essential which can be enhanced by AI
- Encouraging cross-site collaboration and shared accountability.

Looking Ahead

- AI brings both opportunity and urgency. The challenge for all of us is to ramp faster, collaborate closer, and continuously build new skills.
- But when we get it right — when we align technology, supply chain, and talent — we create something far more powerful.
- That is the real promise of resilience — not just to endure challenges, but to multiply progress across the ecosystem





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