

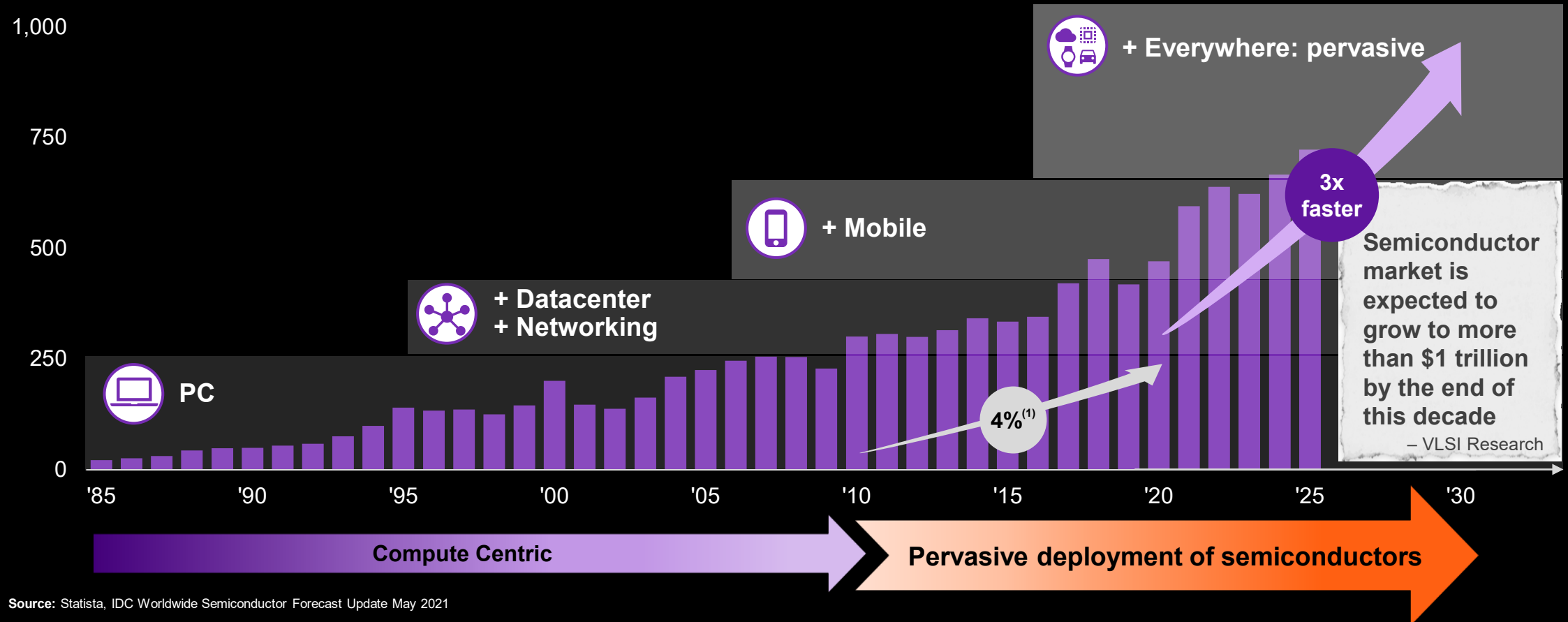


# **Welcome to the U.S. Executive Forum**

Dr. Bami Bastani, SVP & Senior Advisor  
to the CEO, GF

# New Golden Age for Semiconductors

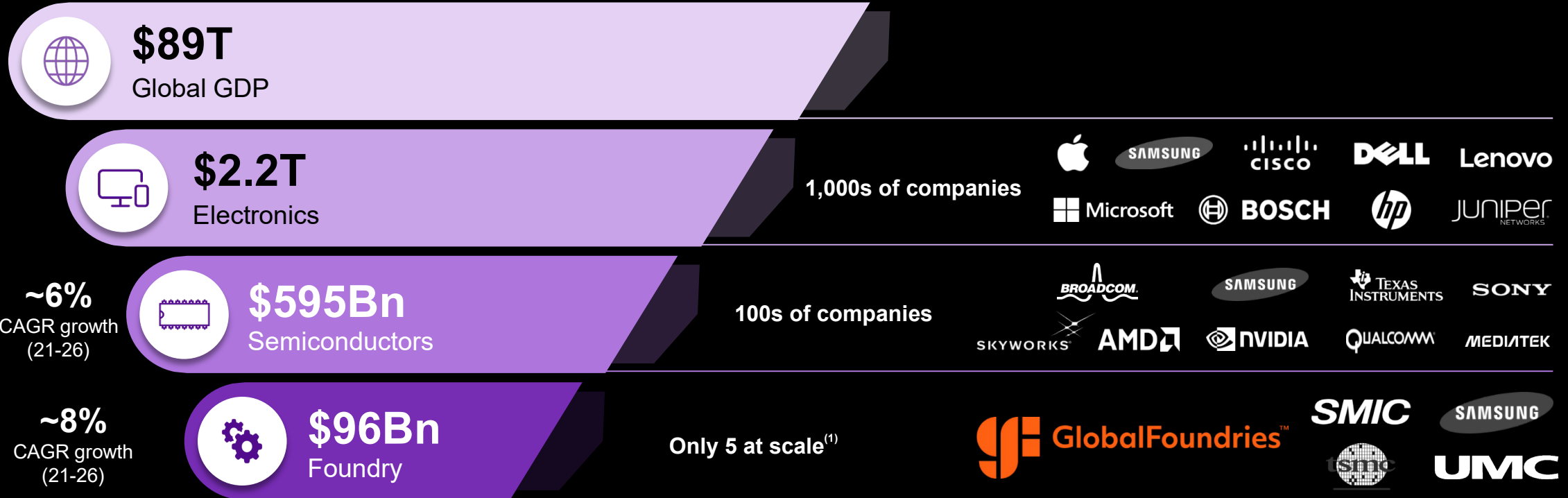
## Semiconductor Industry Revenue \$Bn



Note:  
1. IBS Research, 2010-2020 CAGR 3.96%

# Foundries: Bedrock of the Tech Ecosystem

Market Size (2021)



**Semiconductors outpace GDP & foundry outpaces semiconductors**

Source: Global GDP: World Bank, IMF. Electronics; Semiconductors and Foundry: Gartner "Forecast, Semiconductor Foundry Revenue, Supply and Demand, Worldwide, 1Q22 Update (April 2022)

Note:  
1. Excludes smaller foundry players, defined as those with less than \$2Bn of foundry revenue

# Dynamic Shifts in the Industry

**Demand volatility due to compute cycles**  
*“Chasing Moore”*



**Broad-based, durable demand drivers**  
*“A new era of more”*

**Supply leads the way**  
*Capacity assumed as infinite*



**Scarce capacity is precious**  
*Supply will chase demand*

**Foundry takes all the risk**  
*“Build it and they will come”*



**Partner to build together**  
*“Everyone has skin in the game”*

**Imbalanced value capture**  
*Sub-par return on invested capital*



**Sustainable value sharing**  
*Value in supply security and differentiation*

**A new collaborative partnership model is required**



# Thank you

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