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

0 250 500 750 1,000

'85 '90 '95 '00 '05 '10 '15 '20 '25 '30

+ Mobile
+ Everywhere: pervasive

Semiconductor market is expected to grow to more than $1 trillion by the end of this decade — VLSI Research

3x faster

Source: Statista, IDC Worldwide Semiconductor Forecast Update May 2021

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

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Foundries: Bedrock of the Tech Ecosystem

Market Size (2021)

$89T
Global GDP

$2.2T
Electronics

~6%
CAGR growth (21-26)

$595Bn
Semiconductors

1,000s of companies

100s of companies

~8%
CAGR growth (21-26)

$96Bn
Foundry

Only 5 at scale\(^1\)

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

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Dynamic Shifts in the Industry

Demand volatility due to compute cycles
“Chasing Moore”

Supply leads the way
Capacity assumed as infinite

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

Imbalanced value capture
Sub-par return on invested capital

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

Scarce capacity is precious
Supply will chase demand

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

Sustainable value sharing
Value in supply security and differentiation

A new collaborative partnership model is required