



# Semiconductor Opportunity

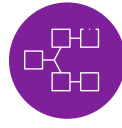
Semiconductor Industry growth is driven by long-term megatrends

# Semiconductors enable the world's digitalization & green transition



## Consumer

- 5G & 6G Smartphones
- Augmented & Virtual Reality
- Smart & Connected



## Infrastructure

- 5G & 6G Network
- Cloud Computing & AI
- Data Storage



## Mobility

- Car Electrification
- Car Digitalization
- Vehicle Sharing & Network



## Industrial

- Industry 4.0
- Renewable Energy Generation
- Cybersecurity & Defense

# Semiconductors are a key enabler of the AI Revolution

## Semiconductor

Equipment

Manufacturing

IP & Design Tools

Design

ASML, Intel, Broadcom, Nvidia, Applied Materials, etc.

## Infrastructure

Equipment

Manufacturing

Amazon, OpenAI, Microsoft, Google, etc.

## Software & Services

Software

IT Services

Microsoft, Meta, SAP, Adobe, Salesforce, etc.

# How will semiconductor contribute to the rapid development of AI?

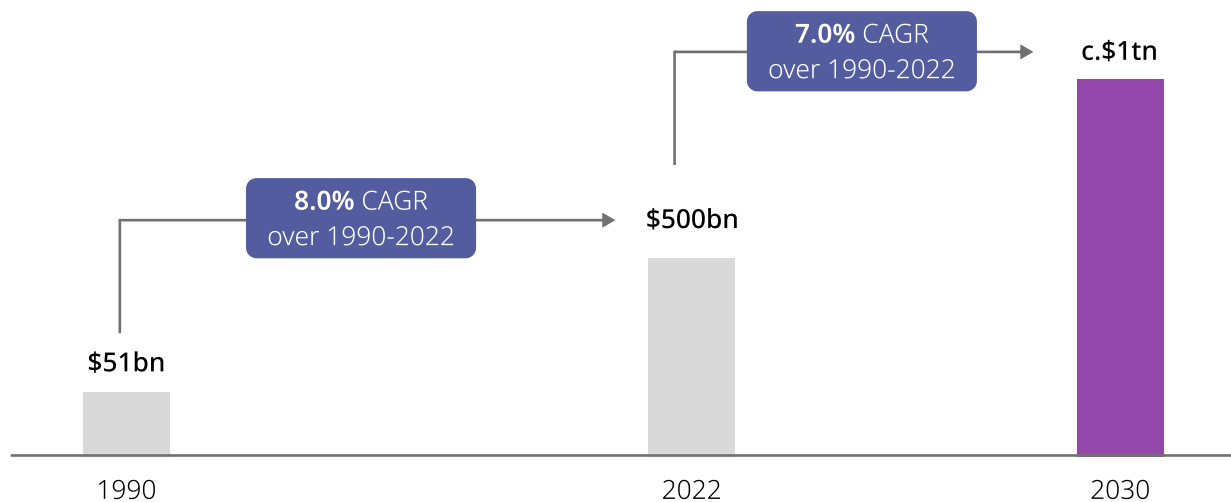
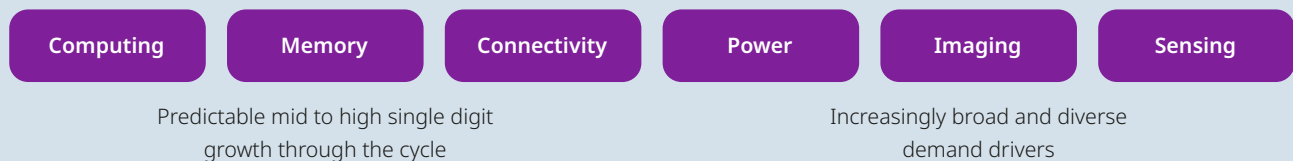
- Semiconductors are the essential functionalities of data centers, on which AI softwares rely.
- Innovation in compute, connectivity and memory critically drives the next AI applications.
- Deployment of AI capabilities across actual use cases in the world economy requires huge build up of the cloud infrastructure, leading to a massive growth opportunity for semiconductors.



## Predictable growth toward \$1 Trillion in 2030

Semiconductor Industry is transforming at unprecedented pace

Semiconductors enable virtually all functionalities of the digital age





## Scale supply chain to address 2x market

- Semiconductor industry doubling in a decade from \$500 billion in 2020 to \$1 trillion in 2030
- Necessity to expand supply chain 2x end to end

## Enable green transition

- Adapt semiconductor manufacturing processes to reduce carbon footprint and water usage
- Develop semiconductor devices enabling energy-efficient computing and the electrification of the world

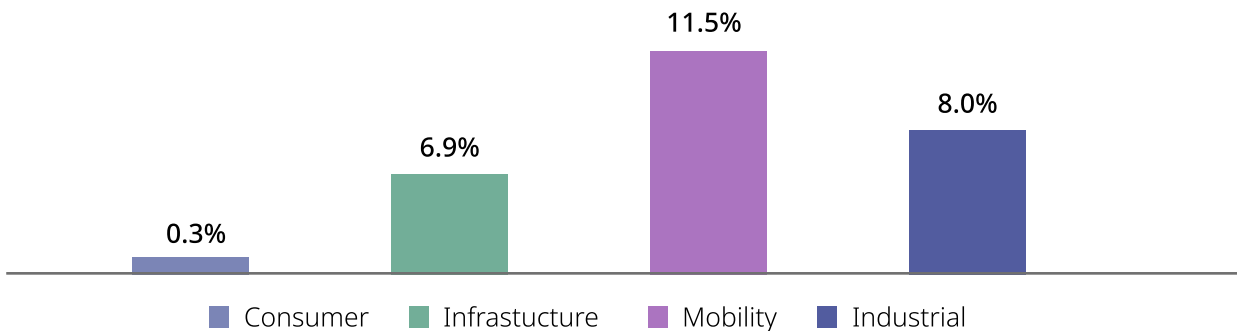
## Lead regionalization

- All major countries looking for increased semiconductor supply chain sovereignty and resilience
- Attractive incentive packages at government level (subsidies, tax breaks) ...  
... and at customer level (long-term agreements, capex participation)

# Europe leads Mobility & Industrial Revolutions

## Fastest growing semiconductor markets

Semiconductor markets CAGR between 2022-2027



## Europe leads globally

Market share 2022



End-to-end leadership across the value chain



Europe strongly benefits from the technological transformation of the Mobility & Industrial sectors

## Europe's innovation ecosystems enable Artificial Intelligence

### Research Centers

leti <sup>■</sup> imec  
022tech

Fraunhofer

Top global research centers

### IP Licensing

arm

~100% market share for smartphone application processors IP

Alphawave      Imagination

### Semiconductor Materials

soitec

~65% market share for SOI used in ~100% of 5G smartphones

iQE      siltronic  
perfect silicon solutions

### Semiconductor Equipment

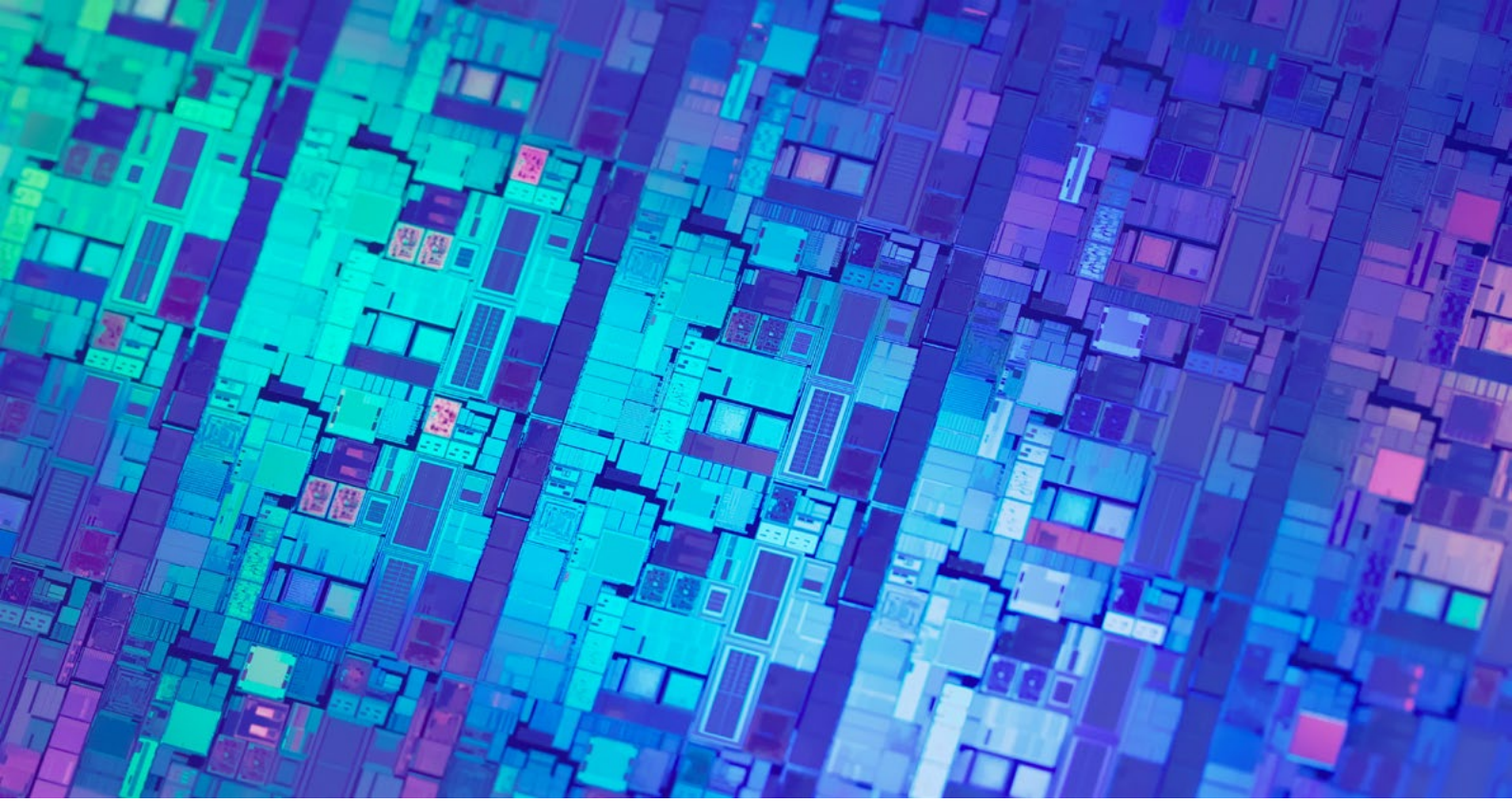
ASML      Besi

~ 100% market share for EUV tools, essential for leading edge manufacturing

AIXTRON      ~70% market share for MOCVD

ASM      ~50% market share for ALD tools





SILIAN

## Contact

**Postal address**

Silian Partners SA  
13-15 avenue de la Liberté  
L-1931 Luxembourg  
Grand Duchy of Luxembourg

**Email**

[contact@silianpartners.com](mailto:contact@silianpartners.com)

[www.silianpartners.com](http://www.silianpartners.com)