

# TURNING THE TIDE FOR SEMICONDUCTOR MANUFACTURING IN THE U.S.

## KEY CONCLUSIONS FROM JOINT SIA-BCG REPORT ON SEMICONDUCTOR MANUFACTURING

1

### SEMICONDUCTORS ARE CRITICAL FOR NATIONAL SECURITY & THE ECONOMY



5G



Quantum computing



Artificial intelligence



Autonomous systems



Space & hypersonics

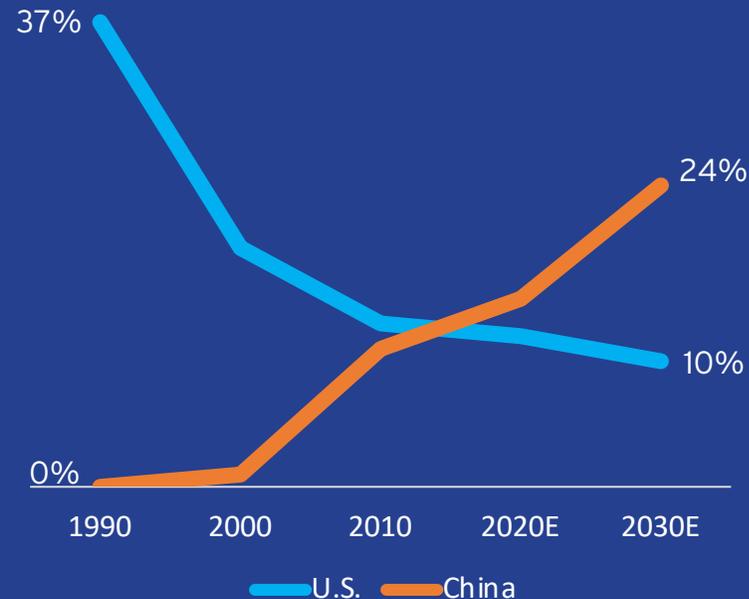


Cybersecurity

2

### U.S. SHARE OF CHIP MANUFACTURING IS ERODING WHILE CHINA'S IS GROWING

Share of Global Semiconductor Manufacturing 1990 -2030E



3

### INCENTIVES ARE NEEDED FOR AMERICA TO COMPETE

	\$20B program (over 10 years)	\$50B program (over 10 years)
Share of "white space" captured by US (excl. China)	21% ↑	41% ↑
US ranking among 6 global competitors (excl. China)	#2 ↑	#1 ↑
# of new fabs to be built in the US	14 ↑	19 ↑
Expected Private Sector Investment	\$174 B	\$279 B