CHIPS FIGHTING COVID-19

THERE ARE A NUMBER OF WAYS SEMICONDUCTORS HAVE PROVEN ESSENTIAL IN SUPPORTING THE WORLD THROUGH THE PANDEMIC:

1. Medical Devices
2. Public Testing and Tracing
3. Accelerating Vaccine Development
4. Virtual Everything
5. Remote Healthcare and Vulnerable Populations
THE GLOBAL CHIPS SHORTAGE AND THE INDUSTRY’S RESPONSE
CHIPS FOR AMERICA ACT/FABS ACT
THE GLOBAL SEMICONDUCTOR MARKET

GLOBAL SEMICONDUCTOR SALES ($B)

+6.8% '19/20
U.S. INDUSTRY MARKET SHARE

2020 GLOBAL MARKET SHARE

U.S.: 47%
Korea: 20%
Japan: 10%
Europe: 10%
Taiwan: 7%
China: 5%

A VIRTUOUS CYCLE OF INNOVATION

Higher R&D Investment
Higher Revenue and Profits
U.S. technology leadership
# U.S. Technology Competitiveness

## Semiconductor R&D Expenditures as a Percentage of Sales by Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S</td>
<td>18.6%</td>
</tr>
<tr>
<td>Europe</td>
<td>17.1%</td>
</tr>
<tr>
<td>Japan</td>
<td>12.9%</td>
</tr>
<tr>
<td>China</td>
<td>6.8%</td>
</tr>
<tr>
<td>Emerging Markets</td>
<td>8.6%</td>
</tr>
<tr>
<td>Global</td>
<td>13.7%</td>
</tr>
</tbody>
</table>
U.S. DOMESTIC WORKFORCE

277,000

direct jobs in the U.S.
semiconductor industry

ONE

U.S. semiconductor
job supports

5.7

jobs in other parts in
the U.S. economy...

...that's nearly

1,600,000

ADDITIONAL

American jobs
U.S. SEMICONDUCTOR INNOVATION POLICY LANDSCAPE

To ensure continued U.S. leadership in the global semiconductor industry, the U.S. must adopt an ambitious competitiveness and innovation agenda.

- Invest in U.S. Semiconductor Leadership
- Strengthen America’s Technology Workforce
- Promote Free Trade and Protect IP
- Cooperate Closely with Like-minded Economies