

# FutureHorizons



The Global Semiconductor Industry Analysts

## FUTURE HORIZONS Presents

### Attendance Includes:

- Essential Information
  - Convenient Timing
  - Easy Access Location
  - Presentation Slides
  - Lunch & Refreshments
- Plus Meet New Contacts & Share Views With Peers*

*“When People Want The ‘No-Nonsense’ Truth They Come To Future Horizons”*

**Get The Proven Expert’s View At Future Horizons’ Twice-Yearly Annual Market Outlook & Forecast ...**

**The Facts, The Analysis Plus The Reasons Why**

Media Sponsor:

**Electronics  
Weekly**

## IFS2019 Mid-Term Semiconductor Outlook

- o **2019 Update ...**  
What Happened & Why
- o **2020 Outlook ...**  
What Are The Key Economic & Market Trends
- o **Supply & Demand ...**  
CapEx & Capacity Trends
- o **Industry Mega-Trends ...**  
What Are The Key Factors
- o **Key Market Drivers ...**  
The New Killer Product Areas
- o **Technology Outlook**  
Scaling Trends & New Structures

- \* 2019 Is on track for double-digit negative growth, any hope for positive growth were dashed by Q1’s collapse
- \* What triggered the collapse and is it a correction or melt-down?
- \* What too of the underlying market fundamentals, namely Capacity, ASPs and the Global Economy?
- \* What now is our view on the outlook for 2020?
  - Will the memory market stabilize and recover?
  - Will the global economy collapse into recession?
  - What about Brexit and the US-China Trade ‘war’?

Get the latest industry insights at IFS2019 Mid-Term Semiconductor Industry Update

**Sep 17, 2019**

**Holiday Inn Kensington, London, SW7**

Future Horizons Ltd, o Blakes Green Cottage o Sevenoaks o Kent o TN15 0LQ o England

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## Who Should Attend?

### The Forecast is Vital For Executives Responsible For:

- o Market Research & Marketing
- o Strategic Marketing & Planning
- o Executive Management
- o Purchasing & Acquisition
- o Finance & Administration
- o Sales & Distribution Channels
- o Investment & Banking
- o Engineering & Design
- o Project Management
- o Government Organisations
- o Business & Technical Press

### Sign Up Now ...

### Get The Proven Experts' View Future Horizons

Established in 1989, Future Horizons provides a range of semiconductor market research and business support services. Together with its wholly-owned Moscow-based subsidiary, East-West Electronics, Future Horizons is the world's leading authority on the Russian and East European electronics market.

It was also a member of the 1994 European Commission sponsored Cornu Panel of senior industry executives responsible for publishing the "Report of the European Microelectronics Panel" used to help formulate a strategy for future EC microelectronics support in Europe, and undertook a justification analysis for the European governments for both the MEDEA and MEDEA+ programmes.

More recently it co-authored a comprehensive report on the potential 450mm transition and was a key contributor to the EU 10/100/20 initiative and strategy.

Malcolm Penn, founder and CEO of Future Horizons, has over five decades of experience in the semiconductor and electronics industry, and has worked extensively throughout Europe, the USA, the former USSR, Japan and Korea.

Prior to establishing Future Horizons, Mr Penn was Vice President of Dataquest and set up their European semiconductor and other market research activities. Before joining Dataquest, he was Manager of Component Engineering for ITT Europe (now Alcatel) and prior to that held various operations and marketing management positions within the ITT SC worldwide group.

## Get The Inside View At IFS2019-MT

The semiconductor industry is a volatile business where insights, experience and professionalism are key. Strategically timed, the January Market Update summarises and presents the extensive research capability of Future Horizons industry analysts. Giving you the information to confidently plan for the future. Now in its 31st year, Future Horizons' twice-yearly forecast events are a vital link in our charter to provide the industry with high quality, cost effective, market research. Whether a seasoned veteran or industry newcomer, this event is invaluable to executives from the semiconductor, electronics and related industries. Delegates will receive copies of all the material presented in both binder and electronic format.

### Why Attend?

- o Hear an independent assessment of the world economic outlook
- o Get clarification of what is expected to happen in the industry for the coming months and beyond
- o Understand the industry cycles and their effect
- o Review industry outlook for the next one to five years
- o Identify key application and technology issues and trends
- o Update statistics and analysis for internal company decisions
- o Meet new business contacts saving valuable time and money
- o Challenge the experts, test your business positions

***We tell the facts PLUS the reasons why...***

***Meet the analysts - Get the facts - Hear the arguments***

***Clarify judgements - Justify positions***

***"Lack of visibility today makes it very difficult to see what is around the corner, making planning very difficult. These events always give me clarity and a new perspective"***

***"This event is a good opportunity to stay focused, it is very valuable to get this opportunity twice a year"***

***"It is always a refreshing experience to interact with Future Horizons, given their deep insights and industry knowledge ... this event really adds value to our planning and thought processes"***

### Benefits of Attending

- o Attending the seminar will give you the insight to identify the industry patterns and market conditions you can expect to see in the future
- o Forecast data and industry market analysis will enable you to analyse your business models and plans, make more confident business decisions and allocate and adjust your resources accordingly.
- o Immersing yourself in up-to-date industry information will give you the knowledge and confidence to move ahead of the competition.

### Chip Industry Basics



- ◆ CyclicalitY Still Rules ... It's All 'Pigs & Cobwebs'
  1. Economy ... Fundamentally OK But More Downside Than Upside
  2. IC Units ... Holding Up Nicely, 2018 At The Long-Term Average
  3. Fab Capacity ... Net New Capacity Still Tightly Stage-Managed
  4. ASPs ... Back Growing As Well
- ◆ What Could Possibly Go Wrong?
  1. If The Economy Crashes, The Industry Fundamentals Are Sound
  2. Over-Capacity In Memory (NAND Mainly) & Advanced Logic (Smartphones)

### The Calculator Conundrum

All Applications Have A Natural Saturation Point



Once They Do All You Need ...  
You Can't Add More Functions ...  
It's Toast, No More Upgrades!

# Can You Really Afford Not To Be There?

## Agenda

Please Note The Event Is Conducted In English

(Timings & Agenda Approx ... Subject To Change)

**10.30**  
**Welcome & Introduction**

**10.45**  
**Economic Overview**

- \* Current world status and outlook
- \* World GDP contributions
- \* GDP growth trends
- \* Key regional economic outlooks

**IC Industry Outlook**

- \* Current industry status
- \* Future outlook
- \* Key market drivers
- \* Industry trends and key issues

**Supply & Demand**

- \* Manufacturing basics
- \* CapEx & equipment sales trends
- \* Wafer fab capacity trends
- \* Foundry & IDM outlook

**12:45**  
**Networking Lunch**  
(Included in the seminar fee)

**13.45**  
**Industry Mega-Trends**

- \* M&A / Consolidation
- \* Verticalisation Issues
- \* Scaling Trends & Structures

**15.00**  
**Coffee Break**

**15:15**  
**Key Market Drivers**

- \* Automotive
- \* IoT
- \* 5G
- \* AI & Robotics

**Forecast Summary**

- \* The basics revisited
- \* Forecast summary
- \* Ask the analyst open Q&A
- \* Closing remarks

**16.00**  
**Seminar Wrap Up**

### Book A Place

To register please call, email or book online

### Fee

Fee includes copies of all material presented, lunch and refreshment breaks

Seminar hours: 10.30am - 4.00pm (Registration from 10:00am)

Unable to attend? No need to miss out, order the Proceedings instead

### 30% Group Discount

For three or more delegates from the same company.

(To qualify, registration and payment must be received together)

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# Registration Information

Please Register Me For:

## IFS2019 Mid-Term Semiconductor Market Outlook & Forecast

(Send Completed Form By Fax/Mail Or Online)

### Registration

Registration should be made using this form - please copy for additional delegates to qualify for the group discount. Participation is subject to space availability.

**Please register early to ensure availability**

### Group Discounts

30% group discount price applies to three or more delegates from the same facility registering at the same time with the registration fee paid on a single invoice.

### Cancellations

Cancellations made less than two weeks prior to the workshop are subject to a 50% cancellation fee and must be confirmed in writing, otherwise the full workshop fee will apply. Refunds will not be granted after the workshop date or for no-shows. Substitutions may be made at any time up to the workshop date and confirmed in writing to Future Horizons.

In the unlikely event that the workshop is cancelled, delegates will be notified and all fees paid will be refunded in full.

### Payment Must Be Pre-Paid IN FULL

It is the delegate's responsibility to ensure that payment has been made.

The registration fee includes presentation material, refreshment breaks and lunch but NOT hotel accommodation. If accommodation required, please enquire directly with the hotel.

**NB. VAT Applies To ALL UK-Based Events**

Payment can be made by cheque (drawn on a UK bank only), or by bank transfer to: Future Horizons Ltd, Royal Bank of Scotland, 3a Edinburgh Road, Portsmouth, PO1 1DA, UK  
Sort Code: 16:28:24 / Account No: 11686316 / Swift: RBOS GB 21223  
IBAN #: GB02 RBOS 1628 2411 6863 16

Date	Venue	Check Box
Tue 17 Sep 2019	Holiday Inn Kensington UK	

### Delegate Details (Or Attach Business Card)

Full Name

Job Title

Company

Full Postal Address

PO No (if applicable)

Phone Fax

E-mail

Special Diet? Yes No If "Yes", specify:

### Registration Fee (Per Delegate)

Standard Rate	Group Rate (3 or more)
<b>Seminar Fee £595.00</b>	<b>Seminar Fee £415.00</b>
<b>VAT @ 20% £119.00</b>	<b>VAT @ 20% £ 83.00</b>
<b>Total Fee £714.00</b>	<b>Total Fee £498.00</b>

Proceedings (E-Mail) £195 (No VAT)

An invoice will be sent by email on receipt of workshop registration.

**Pre-Payment Mandatory** (Or Company PO)

Payment by UK Cheque, Bank Transfer or PayPal

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