

# FutureHorizons



The Global Semiconductor Industry Analysts

FUTURE HORIZONS  
Presents

Attendance Includes:

- **Essential Information**
- **Convenient Timing**
- **On-Line Location**
- **Presentation Slides**  
(Add-On Option)

*plus Interactive Q&A*

*“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**

## IFS2021 Annual Semiconductor Outlook

- o 2020 Overview ...  
**What Happened & Why**
- o 2021 Forecast ...  
**Key Economic & Market Trends**
- o Supply & Demand ...  
**CapEx & Capacity Trends**
- o Industry Mega-Trends ...  
**The Key Factors Analysed**
- o Key Market Drivers ...  
**New Killer Product Areas**
- o Technology Outlook  
**Scaling Trends & New Structures**

- \* **COVID-19 pummeled global GDP growth in 2020  
Yet the chip market bearily blinked ... what happened?**
- \* **Q4-2020 growth came in at +2.1%, following Q3's +9.8%  
Q4's normally negative ... how can this possibly be?**
- \* **Shortages entered the industry lexicon in Q4-2020  
Customers are now scrambling & price rises common**
- \* **What now is our view on the outlook for 2021?**
  - **Will the chip markets continue their upward trends?**
  - **Will the current supply-side shortages ease?**
  - **What about China & the US-China Trade 'war'?**

**Get the latest industry insights at IFS2021  
Future Horizons' Annual Semiconductor Industry Update**

**Jan 19, 2021 - 1hr Zoom Summary  
Plus The Full Presentation Off-Line**

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

Tel: +44 1732 740440 o E-mail: [mail@futurehorizons.com](mailto:mail@futurehorizons.com) o [www.futurehorizons.com](http://www.futurehorizons.com)

## 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 IFS2021

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 33rd 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 webinar 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

**SC Technology ... Ubiquitous Yet Invisible**



- ◆ Hidden From Sight & Widely Unbeknown, Semiconductors Are The Catalyst That Drives The Whole World Economy, By Enabling The End Products & The Services We Now All Depend On
- ◆ Hard To Identify A Single End Product/Service That Doesn't Require A Chip For Its Existence
- ◆ Image The Pandemic Impact If Covid-19 Had Hit The World In The 1990s, When E-Mail, The Internet, Data Connectivity (Wireless & Wired), Etc. Were All In Their Primitive Infancy?

**Out On A Limb Again With Covid-19**

March 11, 2020 'Rainmaker' Presentation

- ◆ Push Out vs. Economic Crash Conundrum
- ◆ Potential For Strong 2H-2020 Rebound (Apple / Game Consoles)
- ◆ Still Too Early To Call ... Forecast Range +1.5% To +5%
- ◆ 'Good News' Crumb Covid-19 Hit In Q1 Not Q3, Still Time To Recover

Jun 17, 2020 ExpoElectronica Presentation

- ◆ Strong GDP Growth Rebound Once Covid-19 Uncertainty Recedes
- ◆ Global Lockdown Hit The Economic Growth 'Pause' NOT 'Crash' Button
- ◆ SC Market Was In Good Shape Pre-Covid, The Fundamentals Still Are

All Other's Were Forecasting Strong Negative Growth

- ◆ Not Future Horizons – Our Outlook Was + 1.4%
- ◆ Industry Hardly Blinking, Automotive/Smartphones Aside
- ◆ IT & SCs Were Actually Enjoying A 'Good' Crisis
- ◆ We Believed All Other Forecasts Were Too Pessimistic



Once Again We Stuck To Our Guns & What Our Research Analysis Said

**Full 4½ hr Agenda & Contents**  
Complete Presentation Available Off Line

**Section 1**

**Economic Overview**

- \* Current world status and outlook
- \* World GDP contributions
- \* GDP growth trends

**Section 2**

**IC Industry Outlook**

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

**Section 3**

**Supply & Demand**

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

**Section 4**

**Industry Mega-Trends**

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

**Section 5**

**Key Market Drivers**

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

**Section 6**

**Forecast Summary**

- \* The basics revisited
- \* Forecast summary
- \* Closing remarks

Can You  
Really Afford  
Not To  
Be There?

1 hr Webinar Sub-Set Will Be Selected  
From The Material Above

Please Note The Event Will Be Conducted In English

**Book A Place**

To register please call, email or book online via our website [www.futurehorizons.com](http://www.futurehorizons.com)

**Fee**

Fee options includes webinar only and the option to purchase the full off-line IFS slide set

Webinar starts at 15:00 UK BST, timed for overall worldwide convenience  
(7am US West Coast, 9am Mid-West, 10am East Coast, 4pm Europe, 5pm Russia  
7:30pm India, 10pm China & Taiwan and 11pm South Korea & Japan)

Unable to attend? No need to miss out, order the IFS slide-set instead

The Webinar can also be help inhouse for convenience, please call for details

**Group Discount**

For three or more delegates from the same company.

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

Tel: +44 1732 740440 / e-mail: [forum@futurehorizons.com](mailto:forum@futurehorizons.com)

**Future Horizons Ltd**  
Blakes Green Cottage | Sevenoaks | Kent TN15 0LQ | England

# Registration Information

Please Register Me For:

## IFS2021 Annual 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

Group discount price applies to three or more delegates from the same company  
Group reservations must be made at the same time with the registration fee paid on a single invoice

### Cancellations

No refund for cancellations  
No refunds for no-shows  
Webinar links are for one user / one device personalised and non transferrable

### Payment Terms

The Webinar link will not be activated until full payment is received. It is the delegate's responsibility to ensure that payment has been made.

### UK VAT

This webinar fee is subject to UK VAT, currently 20%, payable by all attendees, regardless of their country of residence or viewing location. The full IFS slide set, which will be delivered electronically via email after the event, is currently zero-rated.

All fees quoted are inclusive of UK taxes. A formal VAT receipt will be issued on request.

Payment can be made by cheque (drawn on a UK bank only), or by bank transfer to: Future Horizons Ltd, Royal Bank of Scotland, Drummond House, q1 Redlands Avenue, Edinburgh EH12 9JN, Scotland, 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 19 Jan 2021	Zoom Webinar	

### Delegate Details (Or Attach Business Card)

Full Name

Job Title

Company

Full Postal Address

PO No (if applicable)

Phone Fax

E-mail

Comments

### Registration Fee (Per Delegate, UK Pounds Sterling)

Standard Rate Group Rate (3 or more)

<b>Webinar Only</b> £114.00 (£95 plus £19 UK VAT)	<b>Seminar Fee</b> £78.00 (£65 plus £13 UK VAT)
--	--

<b>Webinar &amp; Full Set Of Proceedings</b> £214.00 (£195 plus £19 UK VAT)	<b>Webinar &amp; Full Set Of Proceedings</b> £178.00 (£178 plus £13 UK VAT)
--	--

**Proceedings Only (By Email after the webinar broadcast)**  
**Single User - £195.00 \* Intranet/Library/Site Licence - £595.00**

Confirmation will be sent by email on receipt of registration

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

Payment by UK Cheque, Bank Transfer or PayPal

### US Affiliate:

**Lane Mason**  
Future Horizons USA  
Palo Alto  
California 94310  
USA  
lmason@futurehorizons.com

### Israel Affiliate:

**Amir Ben Artzi**  
40 Derech Hayam St.  
Havatzelet Hasharon, 42937 Israel  
Tel: + 972 73 7367966  
Fax: + 972 9 8665799  
amir@amircm.com

### Russia Affiliate:

**ELINT**  
6th Floor, 40 Bldg  
1, 3y Proezd Maryinoy Roshchi  
127018 Moscow, Russia  
Tel: +7 459 228 0766  
Fax: + 7 495 787 3869  
sorlov@futurehorizons.com

### India Affiliate:

**Pradeep Chakraborty**  
Mediaworks  
Tel: +91 99451 27632  
pradeepchakra@gmail.com

### Europe Affiliate:

**GMC Suisse**  
Ch. de la Dauphine 20  
CH-1291 Commugny  
Switzerland  
Tel: + 41 22 349 0939  
wladek@grabinski.ch

### Far East Affiliate:

**Masanori Sugane**  
Future Horizons Japan  
Tokyo 173, Japan  
Tel: + 81 3 6805 8915  
Fax: + 81 3 6805 8916  
mail@futurehorizons.com