

FutureHorizons



The Global Semiconductor Industry Analysts

FUTURE HORIZONS Presents

Attendance Includes:

- Essential Information
- Convenient Timing
- On-Line Location
- Presentation Slides

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’
Market Outlook & Forecast**

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

IFS2023 Annual Semiconductor Outlook

- o **2022 Overview ... Boom Turned To Dust**
What Happened & Why
- o **2023 Forecast ... When Will It Recover?**
What Are The Market Trends
- o **Supply & Demand ... Pros & Cons**
CapEx & Capacity Trends
- o **Industry Mega-Trends ... Plus Ca Change?**
The Key Factors Analysed

We Were The Only Analyst To:

- * Forecast COVID’s Impact On The 2020 SC Market
- * Warn Supply Chain Shortages In 2021
- * Warn Of The 2H-2022 Downturn
- * Warn Of Negative Growth In 2023

Our IFS Insights Have The Best Industry Track Record
Join Our IFS Webinar & Find Out

- How Long & Deep Will The Market Downturn Be?
- What Is The Market Outlook For 2023-24?
- What Will Be The Likely Industry Repercussions?
- How To Build Resilient Strategies & Business Models
- Get Advanced Copies Of All Slide Material Presented

Get the latest insights at Future Horizons’ IFS2023 Annual
Semiconductor Industry Update

**Jan 17, 2023 - 1hr Zoom Webinar
Plus Interactive Q&A - 3pm UK GMT**

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-MT

The semiconductor industry is a volatile business where insights, experience and professionalism are key. Strategically timed, the September Mid-Term 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' routine insights are a proven vital link in our charter to provide the industry with high quality, cost effective, accurate market research.

Whether a seasoned veteran or industry newcomer, this event is invaluable to executives from the semiconductor, electronics and related industries. Seminar delegates will receive copies of all the material presented in 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 throughout the 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

We Were Right With Our Covid-19 Position

- 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

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Slide 18

And Right Again With Our IFS2021 Forecast



Quarter	Dec 2020 Value (\$b)
Q1-21	1.4% 121.517
Q2	3.5% 125.771
Q3	9.2% 137.341
Q4	-1.0% 135.968
2021	18.0% 520.598



Quarter	Dec 2020 Value (\$b)
Q1-21	3.0% 153.453
Q2	5.3% 129.997
Q3	12.0% 145.574
Q4	-2.0% 148.486
2021	14.0% 547.472

Bull



Quarter	Dec 2020 Value (\$b)
Q1-21	-2.0% 117.443
Q2	-1.8% 116.557
Q3	-6.8% 127.687
Q4	-2.0% 125.133
2021	11.0% 489.820

Bear

There's No Tight Capacity Relief Before 2022 At The Earliest

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Slide 21

Can You Really Afford Not To Be There?

Has the chip market boom come to an end? What fate now awaits the industry? Find out the answer to these and other key questions at Future Horizons' IFS2022 Mid-Term Semiconductor Industry Update Webinar, Sep 13, 2022 - 3pm UK BST (GMT+1)

Agenda Includes

Section 1

Forecast Teardown

- * What we said in Jan/May
- * What actually happened

Section 2

Economic Outlook

- * Current world outlook
- * GDP growth trends

Section 3

Industry Mega-Trends

- * IC Unit Demand
- * IC ASPs

Section 4

Supply & Demand

- * CapEx & equipment sales
- * Wafer fab capacity trends

Section 5

Industry Forecast

- * Current industry status
- * Future outlook

Section 6

Forecast Summary

- * The basics revisited
- * Forecast summary

Suitable For:

- All companies, from startups to established market leaders
- Key decision-makers engaged in the design, fabrication, Supply and use of semiconductors
- Government organisations involved in trade and investment
- Those involved in investing or banking within the electronics industry
- Marketing executives planning future corporate strategy

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

Fee

Fee options includes webinar attendance and slide set

Webinar starts at 3:00pm UK BST, timed for overall worldwide convenience

(7am US West Coast, 9am Mid-West, 10am East Coast, 4pm Europe, 5pm Russia 6:00pm Armenia, 7:30pm India, 10pm China & Taiwan and 11pm Japan & South Korea)

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

The Webinar can also be help in-house 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

Future Horizons Ltd
Sevenoaks | Kent TN15 0LQ | England

Registration Information

Please Register Me For:

IFS2023 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 IFS slide set, which will be delivered electronically and 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, 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 13 Sep 2022	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 / Pre-Event Questions

Registration Fee (Per Delegate, UK Pounds Sterling) Euro & US Dollar Option Available If Preferred (Please Call)

Standard Rate	Group Rate (3 or more)
Webinar Only £180.00 (£150 plus £30 UK VAT)	Webinar Fee £150.00 (£125 plus £25 UK VAT)

Proceedings Only (By Email after the webinar broadcast)
Single User - £150.00 * Library/Enterprise Licence - £650.00

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