



INCREASING INVESTMENTS FOR SEMI MANUFACTURING

VIDEO TRANSCRIPT

Patrick Moorhead: So this is the semiconductor edition and you are the semiconductor lead. And I spent a few years in semiconductors and and as an industry analyst, I cover them. But a couple hot topics that I that I wanted to hit on. And first of first of all, we've seen these huge investments in from from chip manufacturers. And whether it's Intel and what they're doing in Ohio, in the EU, you have TSMC, you have Samsung, I mean, just bursting at the seams with buildings that we would love to have the capacity today, but that's not necessarily reality. And the question for you is, is what does it mean for the semiconductor industry and OEMs as a whole?

Syed Alam: Yeah, very good question. We see these announcements coming in and first thing, we can predict that these facilities coming online in the next couple of years would help with the supply shortage in the long term. Right. And then there are implications for the whole semiconductor ecosystem. For example, equipment manufacturers, obviously, they're seeing the increased demand is good for their business. Plus, there are impacts on different layers of the semiconductor ecosystem. There are people who are supporting the equipment manufacturers, then there are companies who are helping building the fabs. So you will see the impact across the ecosystem. And another implication across all of this is more jobs created here and there will be what our idea of jobs,

whether it's people working on the manufacturing floor or the engineers helping with yield optimization or manufacturing optimization. So wide variety of job across the manufacturing work that could also be very helpful. And then there is also implications for suppliers into the manufacturing, whether it's companies providing gas or chemicals or other raw materials into the manufacturing. So it's just not building the fabs it's the whole induced impact to the other aspects of the ecosystem.