

# THE PULSE OF THE SEMICONDUCTOR INDUSTRY

## VIDEO TRANSCRIPT

**Patrick Moorhead:** This conversation has, I mean, not that I needed to get any more excited about semiconductors. Not that semiconductors are recession proof, but the biggest change that I've seen from 2008. The economic woes that we had is the CEOs and not just of semiconductor companies, but enterprises, people who buy these things is that they're looking at technology as anti-recessionary, which meaning they're looking at the challenges that they have. Some of the biggest challenges are with the workforce and with supply chain and the ability to add technology that is supercharged by semiconductors. So I feel pretty good about where we're going here, even though we could be going into some murky waters here in the future.

**Syed Alam:** Yeah, as as I said in the beginning, industries are cyclical, we are used to it. And generally, actually just take the 2008,2009 example, semiconductor industry bounced back very fast from that also. And the number of units shipped has been increasing considerably. I think in 2021, there were 1.1 trillion units or chips shipped. If you divide by 7 billion people, that's like 150 or so chips per person. So that's then some advanced economies. I think people may be using 2,000 or 3,000 chips on a daily basis. So I think there's a very bright future for our industry.

**Patrick Moorhead:** So Syed, how do people get The Pulse report, research report?.

**Syed Alam:** Yes. Thank you for asking this question. One, we will make it publicly available on our website on Accenture.com. We will also share it with the participants who participated in this survey. And then of course, we'll share it over with our clients around the globe also.

**Patrick Moorhead:** That sounds great. If we get some link to it, I'll put it in the show notes as well for anybody. So is there anything, we've talked about challenges, we talked about opportunities. I mean, we covered a lot of topics, Syed. Anything, anything we missed?

**Syed Alam:** I think we've covered it all.

**Patrick Moorhead:** Okay. Now, we did. So I'd like to thank you for coming on the show again, this is our fourth video. I think maybe third, I lose count when I'm having fun in this beautiful office here, Accenture office in downtown Austin with the cool art. I love it! Almost makes me maybe you wish I worked in an office. I don't know. Maybe we'll see, but thanks again for coming on the show.

**Syed Alam:** Thank you.



**Patrick Moorhead:** Sounds good. So this is Pat Moorhead and Syed Alam, signing out for the Moor Insights & Strategy Podcast. But, I'd like to thank you for tuning in. If you'd like what you heard, hit that subscribe button. If you have any feedback, Syed and I are both on social media, I spend way too much time on there. Hopefully. I think Syed spends less time on there, thankfully. But you know how to find me. Have a great morning, have a great afternoon, evening, wherever you are on the planet. Thanks and take care.

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