

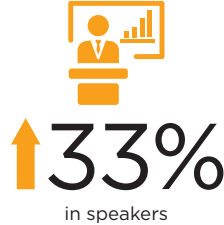
# SEMICON® WEST

JULY 11-13, 2023 | MOSCONE CENTER, SAN FRANCISCO, CA

## POST SHOW REPORT

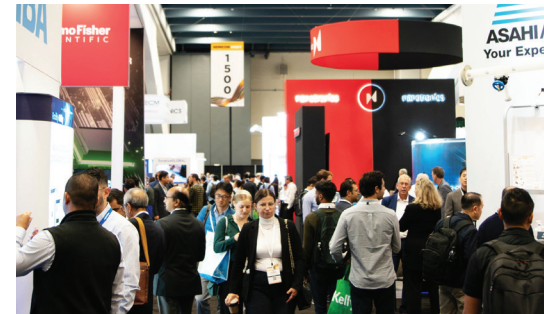


### SEMICON WEST 2023 OUTCOMES YIELD DOUBLE-DIGIT YEAR-OVER-YEAR GROWTH!



Thank you for an energizing week at SEMICON West, FLEX Conference & Exhibition, and DAC. Please reach out to us if you have any questions.

THE SEMICON WEST TEAM  
semiconwest@semi.org



### THANK YOU TO OUR SPONSORS

SEMI would like to acknowledge our SEMICON West 2023 Sponsors. Their participation and support are vital to maintaining the quality, impact, and influence of this event.

PLATINUM



GOLD



SILVER



EVENT



## POST SHOW REPORT

### ATTENDEE BREAKDOWN

#### STATS

	REGISTERED	VERIFIED During Show Days
ATTENDEES	8,018	6,711
EXHIBITORS	4,072	3,544
PRESS / ANALYSTS	52	42
FLEX PARTICIPANTS	480	405
<b>TOTAL</b>	<b>12,622</b>	<b>10,702</b>
<b>SEMICON WEST TOTAL</b>		<b>10,702</b>
<b>DAC TOTAL</b>		<b>5,790</b>
<b>COMBINED SHOWS TOTAL</b>		<b>16,492</b>



#### TOP REGIONS REPRESENTED

<b>NORTH AMERICA</b>	<b>83%</b>
<b>ASIA</b>	<b>13%</b>
<b>EUROPE</b>	<b>4%</b>



**75%**

of visitors influence buying decisions



**40%**

of visitors represent engineering or technology roles

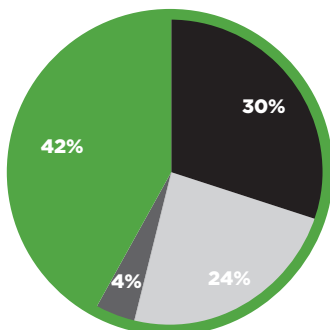


**17%**

of visitors are international

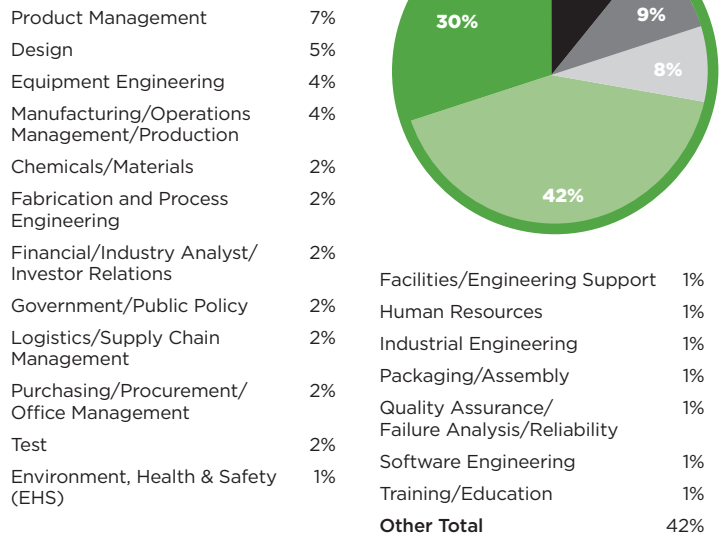
#### PURCHASING AUTHORITY

- RECOMMEND/EVALUATE/CONSULT
- FINAL DECISION MAKER/CO-DECIDING/CRUCIAL
- NO ROLE
- SPECIFY



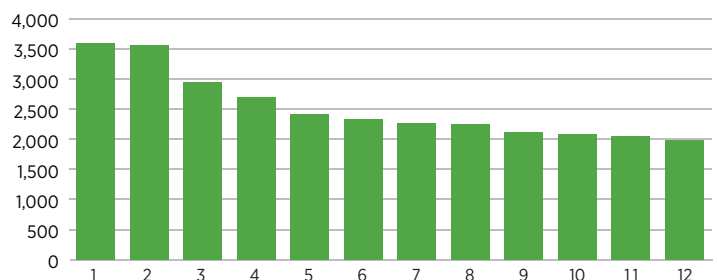
#### PRIMARY JOB FUNCTION—COMBINED

- MARKETING, SALES, BUSINESS DEVELOPMENT
- EXECUTIVE MANAGEMENT/BOARD MEMBER
- R&D
- NOT SPECIFIED
- OTHER



#### TOP 12 AREAS OF INTEREST

<b>1 FRONT-END PROCESSING</b>	<b>34%</b>
<b>2 WAFERS/SUBSTRATES</b>	<b>33%</b>
<b>3 FOUNDRIES</b>	<b>28%</b>
<b>4 PROCESS MATERIALS: GASES/LIQUIDS/SOLIDS/CHEMICALS</b>	<b>25%</b>
<b>5 R&amp;D/TECHNOLOGY TRANSFER</b>	<b>23%</b>
<b>6 SUPPORT PRODUCTS/CLEANROOM</b>	<b>22%</b>
<b>7 MANUFACTURING SERVICES AND CONSULTING</b>	<b>21%</b>
<b>8 ASSEMBLY/PACKAGING</b>	<b>21%</b>
<b>9 PACKAGING/ASSEMBLY</b>	<b>20%</b>
<b>10 INSPECTION &amp; MEASUREMENT/METROLOGY</b>	<b>20%</b>
<b>11 ENGINEERING SERVICES</b>	<b>19%</b>
<b>12 PACKAGING &amp; TEST SERVICES (OSAT)</b>	<b>19%</b>

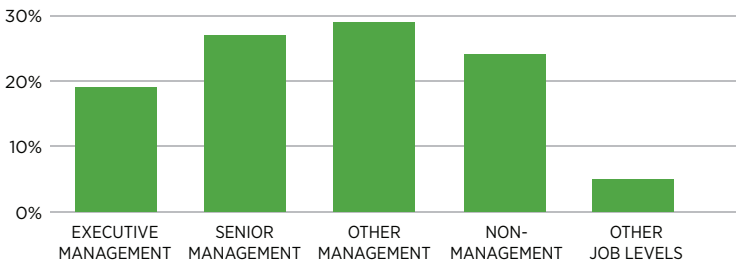


## POST SHOW REPORT

### ATTENDEE BREAKDOWN

#### JOB TITLE

<b>EXECUTIVE MANAGEMENT</b> <i>(Chairman, CEO, CFO, CMO, President, Chief, Managing Director)</i>	<b>19%</b>
<b>SENIOR MANAGEMENT</b> <i>(Vice President, Director)</i>	<b>27%</b>
<b>OTHER MANAGEMENT</b> <i>(Program Manager, Manager)</i>	<b>29%</b>
<b>NON-MANAGEMENT</b> <i>(Staff, Professional, etc.)</i>	<b>24%</b>
<b>OTHER JOB LEVELS</b>	<b>5%</b>



#### APPLICATIONS INTEREST

<b>SMART MANUFACTURING</b>	<b>53%</b>
<b>ARTIFICIAL INTELLIGENCE SYSTEMS (AI)</b>	<b>37%</b>
<b>INTERNET OF THINGS (IOT)</b>	<b>29%</b>
<b>AUTOMOTIVE ELECTRONICS/SMART TRANSPORTATION</b>	<b>27%</b>
<b>OTHER APPLICATIONS</b>	<b>25%</b>
<b>VIRTUAL REALITY/AUGMENTED REALITY (VR/AR)</b>	<b>21%</b>
<b>CONSUMER ELECTRONICS</b>	<b>21%</b>
<b>MEDICAL ELECTRONICS/MEDTECH</b>	<b>19%</b>
<b>MOBILE TECHNOLOGIES/WIRELESS/5G</b>	<b>17%</b>
<b>GREEN MANUFACTURING/EHS</b>	<b>17%</b>
<b>WEARABLES</b>	<b>17%</b>
<b>CLOUD COMPUTING/HIGH-PERFORMANCE COMPUTING</b>	<b>14%</b>
<b>IMAGING</b>	<b>13%</b>
<b>OLED</b>	<b>12%</b>

### INDUSTRIES SERVED



**SEMICONDUCTOR**  
**85%**



**SENSORS**  
**23%**



**MEMS**  
**17%**



**MEDICAL**  
**15%**



**AEROSPACE**  
**15%**



**PHOTONICS**  
**14%**



**AUTOMOTIVE/TRANSPORTATION**  
**14%**



**IMAGING**  
**12%**

<b>Other</b>	<b>11%</b>
<b>Display/FPD</b>	<b>10%</b>
<b>Software/Applications</b>	<b>9%</b>
<b>LED/Solid State Lighting</b>	<b>9%</b>
<b>Photovoltaic/Solar</b>	<b>9%</b>
<b>PCB Manufacturing</b>	<b>9%</b>
<b>Consumer Electronics</b>	<b>9%</b>
<b>Flexible Hybrid Electronics/Printed Electronics</b>	<b>9%</b>

<b>Professional Services/Consulting</b>	<b>8%</b>
<b>PCB Assembly</b>	<b>7%</b>
<b>EMS/Contract Manufacturing/Precision Engineering</b>	<b>7%</b>
<b>Academia/University/R&amp;D</b>	<b>7%</b>
<b>Government</b>	<b>7%</b>
<b>Association/Non-profit</b>	<b>2%</b>
<b>Media/Publication</b>	<b>2%</b>

## POST SHOW REPORT

### CEO SUMMIT KEYNOTES & EXECUTIVE PANELS

SEMICON West 2023, themed **BUILDING A PATH FORWARD**, focused on key challenges affecting the global microelectronics industry which include supply chain disruptions, climate change, and talent shortages, all necessary to enable a \$1T industry.

The event provided a pathway for attendees to foster collaboration, knowledge exchange, and business opportunities under 3 key priorities that were integrated into our CEO Summit Keynotes & Executive Panels as a daily theme.

#### CEO SUMMIT KEYNOTES

##### TUESDAY, JULY 11



Vincent Mattera, Jr.  
Chair and CEO,  
Coherent



Oscar de Bok  
CEO,  
DHL Supply Chain



Lutz Rissing  
Managing Director and  
Executive Officer,  
Heidenhain

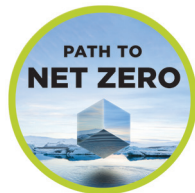


Tim Archer  
President and CEO,  
Lam Research



Tony Kawai  
President and CEO,  
TEL

##### WEDNESDAY, JULY 12



Gary Dickerson  
President and CEO,  
Applied Materials



Mukesh Khare  
Vice President and  
General Manager,  
IBM



Keyvan Esfarjani  
Executive Vice President,  
Chief Global Operations Officer,  
General Manager, Manufacturing,  
Supply Chain and Operations,  
Intel



Aamir Paul  
President,  
North America Operations,  
Schneider Electric

##### THURSDAY, JULY 13



Mary Puma  
Executive Chairperson,  
Axcelis Technologies;  
Chair of the Board,  
SEMI



Tom Sonderman  
President and CEO,  
SkyWater Technology



Tsu-Jae King Liu  
Dean and Roy W. Carlson Professor of Engineering,  
College of Engineering; Distinguished Professor of Engineering  
and Computer Sciences; Member, Kavli Energy  
NanoSciences Institute at Berkeley,  
UC Berkeley

#### EXECUTIVE PANELS

##### NAVIGATING UNCERTAINTY—HOW DO YOU BUILD AGILE SUPPLY CHAINS?

Moderator: SEMI

Panelists: Dell • Intel • KLA • McKinsey & Company • Resilinc

##### AMERICA'S PATH FORWARD IN SEMICONDUCTORS—THE WHOLE OF GOVERNMENT APPROACH TO SUPPORTING CHIPS INVESTMENT

Moderator: Boston Consulting Group (BCG)

Panelists: Arizona Commerce Authority • BDO USA • mySilicon Compass  
State of Indiana • U.S. Department of Commerce

Sponsor

**Indiana**  
Economic Development Corp

##### BULLS & BEARS

Moderator: Semiconductor Reporter

Panelists: Bernstein Research • Jefferies • Parnassus Investments • Tudor Investment

## POST SHOW REPORT

## PROGRAM HIGHLIGHTS

### SUSTAINABILITY

Clarity is here: Sustainability in our industry is the path to health and growth.

SEMICON West 2023 explored the multiverse of initiatives needed for a net zero industry by 2040.

#### Climate Equity & Social Impact

SPONSORS



#### Sustainability & EHS Forum

SPONSORS



#### Startups for Sustainable Semiconductors

SPONSOR



**SEMICON<sup>®</sup> WEST FOREST**

Dedicated to **ASM**

for Outstanding Leadership to SEMI Sustainability

**PATH TO NET ZERO**

**7,344 Trees & 4 Projects Funded**

**190 tCO<sub>2</sub>e Avoided**

### OUR COMMITMENT TO SUSTAINABILITY

SEMI TOOK MULTIPLE STEPS TO REDUCE THE WASTE IMPACT OF SEMICON WEST.

- Utilized Reusable Water Bottle • Recycled Badges • Digital Signages Replaced the Majority of Printed Signs • Digital Touchscreen Monitors Replaced the Large Printed Show Floor Maps on the You-Are-Here Board

#### MOBILE APP—A SUSTAINABLE ALTERNATIVE TO PRINT

**3,725**  
Mobile Installations

**12,684**  
Exhibitor Impressions

**630,289**  
Slide Downloads

**3,124**  
Users w/ Notifications

**2,207**  
Users Sharing Profiles

**502**  
User-to-User Messages

#### FEATURES

- Schedule Builder
- Personal Meetings
- Notes & Drawings



## POST SHOW REPORT

### PROGRAM HIGHLIGHTS

#### WORKFORCE DEVELOPMENT—WFD PAVILION



Addressing the needs of job seekers and HR professionals to attract talent and support the workforce pipeline for the industry.

- Creating a Diverse and Inclusive Industry
- Building a Career in Microelectronics
- Building an Inclusive Talent Pipeline
- “Chip In”—Roadtrip Nation Panel
- SEMI High Tech U

PAVILION SPONSORS



### SMART INITIATIVES



- AI/ML Enabled Manufacturing Operations
- Automation & Equipment Toward Fully Autonomous Factories
- Connectivity & Security Infrastructure
- Data Ecosystem Extended Chip Capacity
- Foundations to Build Agile Supply Chains

PAVILION SPONSORS



Bio-Sensor Innovation for Smarter MedTech •  
Market & Manufacturing Trends for MedTech Sensors

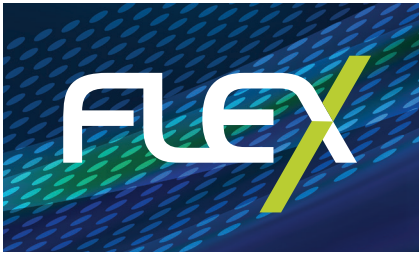


Connecting Automotive to SiC Manufacturing •  
Intelligent Sensors for Smart Mobility •  
Meeting the Demands of Affordable Electrification

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## POST SHOW REPORT



## FLEX CONFERENCE & EXHIBITION

### INTELLIGENTLY FLEXIBLE

ORGANIZERS



### KEYNOTES

- **META REALITY LABS**  
*Advancing Additively Manufactured Electronics (AME) for Heterogeneous Integration*
- **PRAGMATIC SEMICONDUCTOR**  
*Simplifying the IC Ecosystem*
- **RICE UNIVERSITY**  
*The Very Big Picture on Materials—  
All of the Options Fit to Print*

### FUTURE FLEX DISRUPTORS PANEL

Six startup technology entrepreneurs showcased their inventions while venture capitalists offered business insights.

### FLEX EXHIBITS & FLEXTALKS DEMONSTRATION STAGE

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FLEX HIGHLIGHTS

### 12 TECHNICAL SESSIONS

Covered a wide range of topics on flexible hybrid electronics (FHE), advanced packaging, heterogeneous integration, manufacturing, materials, strategy and business, applications, and more.

### STUDENT POSTERS

Featured students from UCLA, SUNY Polytechnical Institute, Northwestern University, Iowa State University, Korea University of Technology and Education, Seoul National University, and more.

### INDUSTRY AWARDS CEREMONY

Annual FLEXI Awards and Student Poster Awards are announced each year.

### INDUSTRY TOUR

NextFlex Technology Hub,  
San Jose, CA

## TEST VISION SYMPOSIUM

### TEST INNOVATION ENABLES THE PATH FORWARD



### KEYNOTES

- TERADYNE
- IEEE EPS

### TEST VISION PANEL

Archon Design Solutions • Intel • PDF Solutions • proteanTecs

### BEST 2022 ATE PAPER AWARD

### 2 DAYS OF PROGRAMS

3 Sessions, 24 Speakers

### NETWORKING

Reception + Breaks

### POSTER PRESENTATIONS

PARTNERS



ASSOCIATES



SUPPORTERS



## POST SHOW REPORT

### OTHER PROGRAMS

#### TechTALKS

Advanced Packaging • Heterogeneous Integration • Lithography & Scaling • Advanced Substrates • MEMS & Sensors • Materials

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#### SEMI MARKET SYMPOSIUM

SPONSORS



#### GLOBAL CYBERSECURITY FORUM

SPONSOR



#### SOI MARKETS & TECHNOLOGY SYMPOSIUM

SPONSORS



## EXCITING SHOW FEATURES

### NETWORKING RECEPTIONS + EVENTS

- Advanced Packaging & Heterogeneous Integration Reception
- FLEX Reception
- FLEX Student Poster Networking Breaks
- MEMS & Sensors Industry Group—MSIG Reception
- SEMI Member Breakfast
- SEMI Standards 50th Anniversary Celebration + Awards
- SemiSisters Reception
- Smart Manufacturing Reception
- Smart Mobility Reception
- Sustainability & EHS Forum Reception
- Test Vision Poster Session & Reception
- VIP Lounge Breaks
- Welcome Reception
- Workforce Development Reception *and More*



#### LOUNGES

- VIP Lounge
- Game Lounge
- Recharge Stations
- Sustainability Lounge
- 20 Under 30 Lounge
- SEMICON West Lounge

#### ENHANCED PRODUCTIVITY

- VR Zone
- Media Hub
- Headshot Central
- Expo Floor Meeting Rooms

#### DAILY DINING

- Food Truck Fare
- Beer & Wine Garden Happy Hour
- Taste of San Francisco



## POST SHOW REPORT

### SEMICON® WEST 20 UNDER 30

SEMICON West 20 Under 30 is a distinguished awards program that identifies the industry's brightest young leaders who:

Demonstrate outstanding **LEADERSHIP** • Practice productive **COLLABORATION** • Exhibit a commitment to **SUCCESS** • Make a significant **DIFFERENCE** • Actively engage in the **COMMUNITY**

This year we received more than **250% increase** in nomination submissions!

We recognized the following future leaders who have demonstrated success in their careers in the microelectronics supply chain.

### CONGRATULATIONS TO THE 2023 AWARD RECIPIENTS



**ADAIR MAYNARD**  
Marketing Specialist  
AdvanSix



**PETAR TODOROVIĆ**  
Senior Data Scientist  
Athinia



**GREGORY CLEVELAND**  
Senior Scientist  
DuPont



**RIKUTO OTSUKA**  
Research and Development  
DuPont



**JENNIFER MARKHAM**  
Scale Up Engineer  
EMD Electronics



**JOSHUA GERMAN**  
Sr. Mechanical Engineer  
EMD Electronics



**NICOLE HUNSICKER**  
Global Product Manager  
EMD Electronics



**SARAH MAKUC**  
New Product Introduction Engineer  
Entegris



**MEGAN KATS**  
Materials Quality Engineer  
Entegris



**BRANDON BOIKO**  
Sr. Principal Application Engineer  
FormFactor



**MATTHEW HARTENVELD**  
Chief Technical Officer  
Innovation Semiconductor



**YAZMIN MONTOYA**  
Supply Chain Technical  
Program Manager  
Intel Corporation



**JENNA STEIN**  
Project Manager  
JE Dunn Construction



**SHAY SERRES**  
Director of Customer Success  
Moov



**SAVANAH WILLE**  
Senior Quality Assurance Specialist  
PEER Group



**MARIANA VERDUGO**  
Manufacturing Engineer  
Raytheon Technologies



**CHRISTOPHER CATANO**  
Process Engineer III  
TEL Technology Center,  
America



**HAILEY JENKINS**  
Process Engineer II  
TEL Technology Center,  
America



**HUNTER FROST**  
Process Engineer  
TEL Technology Center,  
America



**CLAIRE JORDAN**  
Thinfilm Process Engineer  
and Technician Supervisor  
Texas Instruments



## POST SHOW REPORT

### THE PLACE TO MEET



- 43** SEMI INTERNATIONAL STANDARDS MEETINGS
- 26** SEMI TECHNOLOGY COMMUNITY COMMITTEE MEETINGS
- 21** HOSTED MEETINGS FROM BOTH EXHIBITORS + ATTENDEES
- 8** DEVICE MAKER MEETING ROOMS (DMMRS)
- 5** PLATINUM SPONSOR MEETING ROOMS
- 2** SEMI BOARD OF DIRECTORS MEETINGS
- 1** SEMI FOUNDATION BOARD MEETING



**OVER THE COURSE OF FOUR DAYS, THE INDUSTRY CONVENED TO COLLABORATE, INNOVATE, GROW, AND PROSPER.**



### BEST OF WEST

**CONGRATULATIONS TO THE 2023 WINNER**



#### BEST OF WEST 2023 FINALISTS

- LAM RESEARCH—Selective Etch Products
- ONTO INNOVATION—Echo Opto-Acoustic Metrology System
- SANTEC—High-Accuracy Wafer Thickness Mapping System TMS-2000
- SPEA S.P.A.—DOT Tester Auto Maintenance



## POST SHOW REPORT

### VISITING COMPANIES AND ORGANIZATIONS

SEMICON West attracts visitors from around the world and from every major microelectronics company, including buying teams from the world's top capital spending IDMs, foundries, fabless, OSATs, and OEMs.

[VIEW THE LIST ONLINE](#)—*Unique companies only, does not include multiple attendees from each company.*

### MEDIA PARTNERS

Global and domestic trade and business publications partnered with SEMI to bring extensive global coverage of news and information about and from SEMICON West.



**READY TO INCREASE YOUR VISIBILITY, LEAD GENERATION, AND THOUGHT LEADERSHIP OPPORTUNITIES AT SEMICON WEST?**

**Please Contact:**

**Shane Poblete**

T: 1.202.847.5983

E: [spoblete@semi.org](mailto:spoblete@semi.org)

[www.semiconwest.org/exhibits/become-an-exhibitor](http://www.semiconwest.org/exhibits/become-an-exhibitor)



**SEMICON® WEST**  
**JULY 9-11, 2024**  
**MOSCONE CENTER, SAN FRANCISCO, CA**