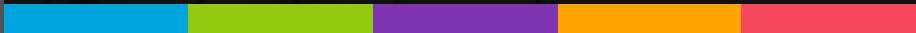


# Cyient Semiconductor Private Limited

SEP 2024



# Semiconductor market rebounds, despite downturns; ~\$600Bn mkt at 13% CAGR



The global semiconductor market **saw a dip of ~12% in 2020** due to the COVID-19 pandemic but rebounded strongly in 2021, reaching >\$550 Bn



The market **continued to grow in 2022**, albeit at a slower pace, despite supply chain challenges



Global Semiconductor Market in 2024 is valued at **\$607Bn**, growing at **12.8%** and expected to reach **\$1.6Tn by 2032**

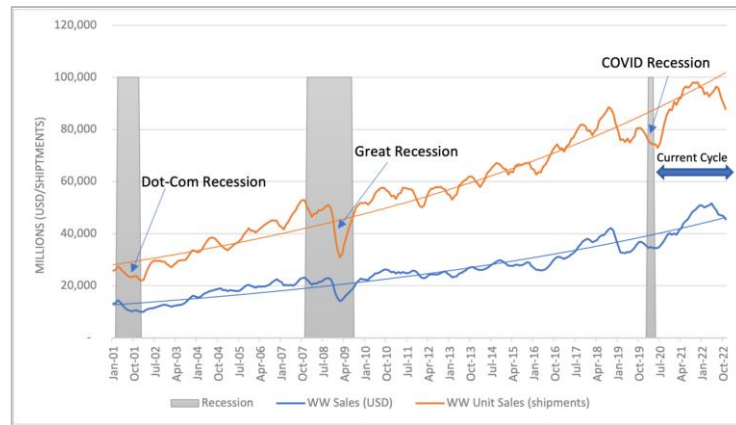


Driven by rapid advancements in tech and increasing demand across **automotive, consumer electronics, and industrial automation** sectors

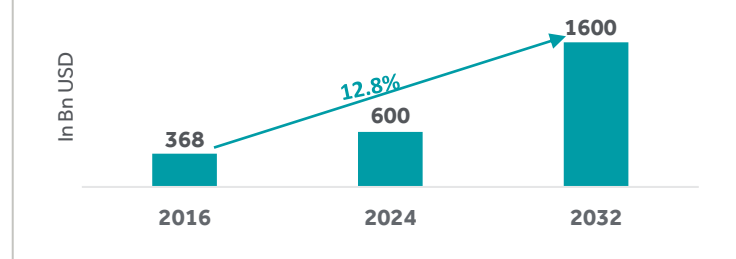


**\$200Bn+** invested in **U.S. semiconductor** capacity, bolstered by global government support and major fab investments

*The recovery of semiconductor market after periodic downturns*

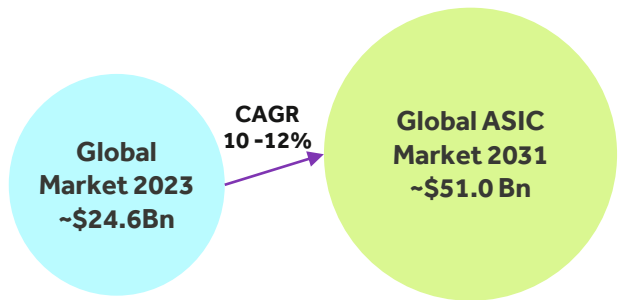


*The market size & growth*



Source: Statista

# ASICs: ~3x faster growth than general purpose chips, driven by IT/OT integration



- ASICs are custom chips made for specific applications, offering **targeted performance, power efficiency, and size optimization**
- **Rising need for small scale, custom, high-performance, energy-efficient chips** to enable IT-OT integration led growth
- **APAC dominates the market** due to strong semiconductor infra, R&D investments, and major players like TSMC, Samsung, and SMIC
- **Consumer electronics (24%), telecom (26%), and automotive (19%)** lead, with industrial poised for fast growth due to increased microcontroller use

	General	ASIC
Semiconductor Mkt	67.4%	32.6%
2016 – 2019 growth	7.9%	3.9%
2019 – 2020 growth	8.2%	<b>15.3%</b>
2021 – 2025E	3.6%	<b>10-12%</b>

## General-Purpose

- ✓ **Versatile** but less optimised
- ✓ Used in **wide range** of applications
- ✓ **Large, less power-efficient,** and underperform in specialised tasks

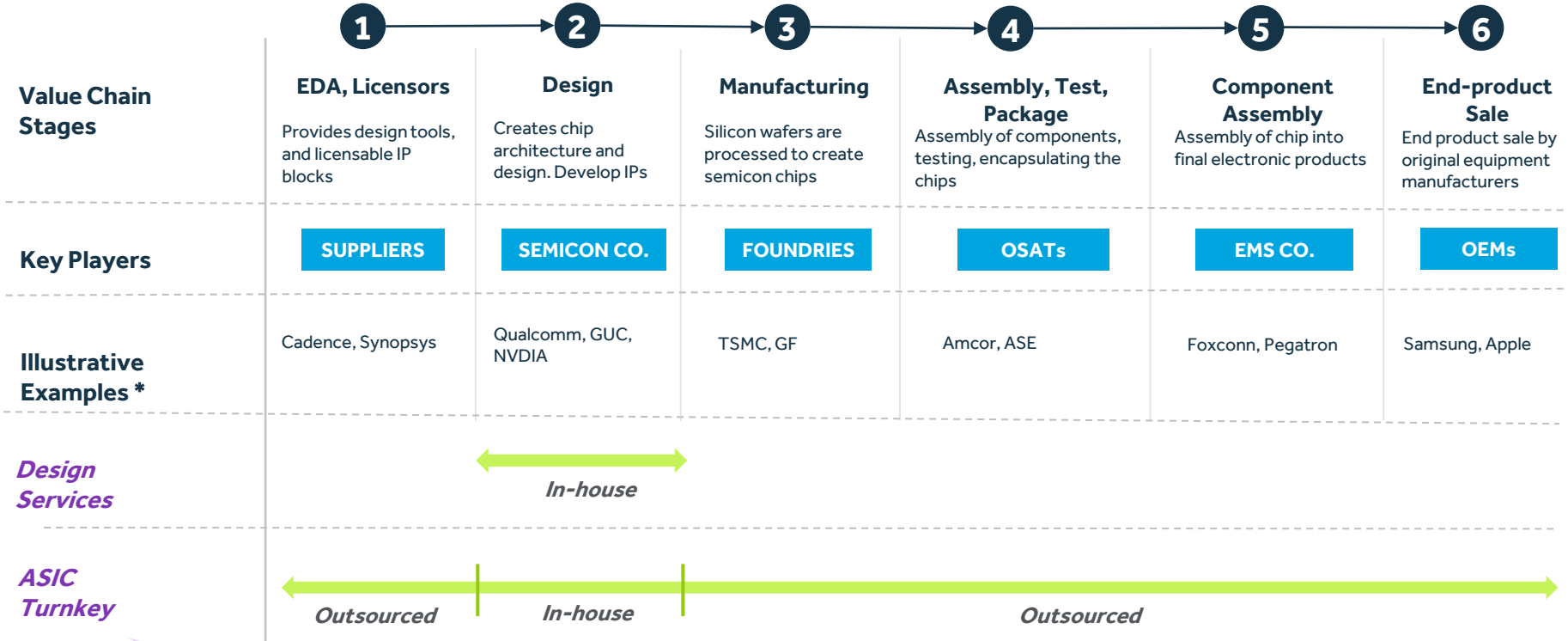
## Application-Specific

- ✓ **Custom-built** for specific tasks
- ✓ Superior in performance, **power, efficiency, and space-saving**
- ✓ Ideal for applications requiring **high specialisation** – IT-OT integration

*Trend reversal in 2019: Higher growth for ASICs than general-purpose chips*

# Cyient provides fabless ASIC turnkey solutions across the entire lifecycle

From material procurement to design, manufacturing, and end-product sales; turnkey includes the entire spectrum



ASIC Turnkey needs different capital structure and business model

\*Illustrative

# Cyient's strengths and decades of head start positions it for high growth



## 25+ Years of Expertise

Expertise in high-performance **analog, RF, and mixed-signal circuits**, and efficient **sensor data capture with low power consumption**



## Strategic Partnerships Across Value Chain

**Longstanding partnership** with leading foundries, EDA/IP giants, OSAT leaders, semiconductor companies and established OEM



## Extensive IP Portfolio

**Hundreds of analog/digital IPs** covering various functionalities & silicon technology nodes



## Capability and Customer Readiness

- **Strong overlap of customers** – ca. 2/3<sup>rd</sup> of demand from existing sectors of DET
- **R&D, IP and Test labs in Germany and Belgium**, with satellite design hubs in India and USA



## Excellent Track Record

**40+ ASIC turnkey projects executed**, delivering **~5M chips** annually. Full-service coverage from design to production and sales

# Thank you

#DesigningTomorrowTogether

[www.cyient.com](http://www.cyient.com)

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