

The background of the slide is a photograph of a semiconductor fabrication plant (fab). The image shows a long, brightly lit aisle with rows of complex machinery on both sides. The floor is made of metal grates. The lighting is a mix of white and blue, creating a clean, industrial atmosphere. The Intel Foundry logo is overlaid in the top left corner.

intel
foundry

Heterogeneous Integration: AI Inspired. Systems Accelerated.

Hong Hao

Corporate Vice President, WW Business Development, Intel Foundry

Forward-Looking Statements

This presentation contains forward-looking statements, including with respect to Intel's: business plans and strategy; current and future technologies, including future process nodes and transistor, manufacturing and packaging technologies; process and product roadmaps and schedules (including expected goals, timelines, ramps, progress, availability and production); future product architectures; expectations regarding process performance, per-watt parity, and other performance metrics; expectations regarding product and process leadership; plans and goals with respect to our foundry business, including with respect to anticipated customers, future manufacturing capacity, service, technology and IP offerings, third-party collaborations, ecosystem support and resilience; AI strategy and capabilities; future social and environmental performance goals, measures, strategies, and results; anticipated growth, future market share, and trends in our businesses and operations; projected growth and trends in markets relevant to our businesses; and other characterizations of future events or circumstances.

Such statements involve many risks and uncertainties that could cause our actual results to differ materially from those expressed or implied, including those associated with: the high level of competition and rapid technological change in our industry; the significant long-term and inherently risky investments we are making in R&D and manufacturing facilities that may not realize a favorable return; the complexities and uncertainties in developing and implementing new semiconductor products and manufacturing process technologies; our ability to time and scale our capital investments appropriately and successfully secure favorable alternative financing arrangements and government grants; implementing new business strategies and investing in new businesses and technologies; changes in demand for our products; macroeconomic conditions and geopolitical tensions and conflicts, including geopolitical and trade tensions between the US and China, the impacts of Russia's war on Ukraine, tensions and conflict affecting Israel, and rising tensions between the US and Taiwan; the evolving market for products with AI capabilities; our complex global supply chain, including from disruptions, delays, trade tensions and conflicts, or shortages; product defects, errata and other product issues, particularly as we develop next-generation products and implement next-generation manufacturing process technologies; potential security vulnerabilities in our products; increasing and evolving cybersecurity threats and privacy risks; IP risks including related litigation and regulatory proceedings; the need to attract, retain, and motivate key talent; strategic transactions and investments; sales-related risks, including customer concentration and the use of distributors and other third parties; our significantly reduced return of capital in recent years; our debt obligations and our ability to access sources of capital; complex and evolving laws and regulations across many jurisdictions; fluctuations in currency exchange rates; changes in our effective tax rate; catastrophic events; environmental, health, safety, and product regulations; our initiatives and new legal requirements with respect to corporate responsibility matters; and other risks and uncertainties described in this release, our most recent Annual Report on Form 10-K and our other filings with the U.S. Securities and Exchange Commission (SEC).

All information in this presentation reflects Intel management views as of the date hereof unless an earlier date is specified. Intel does not undertake, and expressly disclaims any duty, to update such statements, whether as a result of new information, new developments, or otherwise, except to the extent that disclosure may be required by law.

© Intel Corporation. Intel, the Intel logo, and other Intel marks are trademarks of Intel Corporation or its subsidiaries. Other names and brands may be claimed as the property of others. This document contains information on products and/or processes in development.



The AI Era is Changing the Landscape of Technology and Product Development



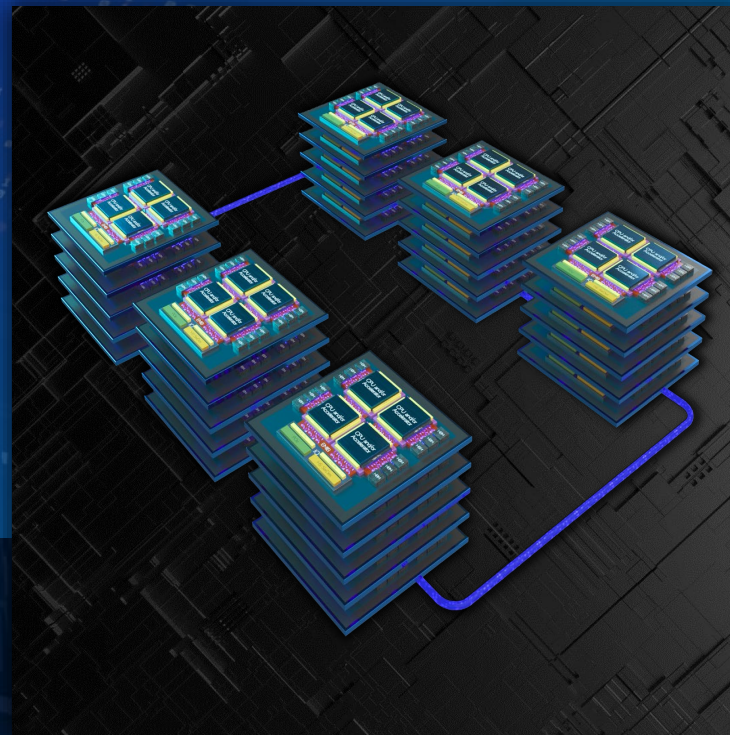
Structural Shifts In Customer Needs

AI / HPC
Has Surpassed
Mobile Revenue



Source: Gartner

Systems of Chips
Chiplets Surpass
Monolithic by 2028



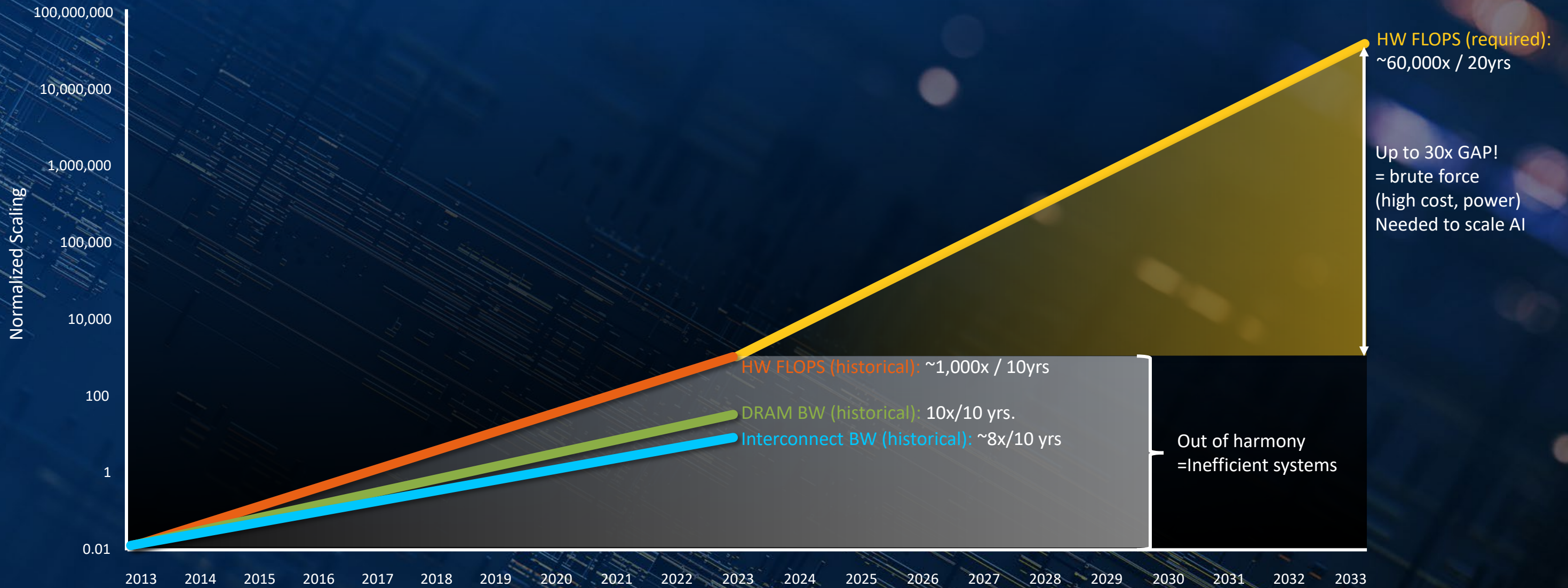
Source: Gartner

Vertical Integration
 $\leq 5\text{nm}$ Wafer TAM:
4% in 2024 to 12% in 2030



Source: IHS, SemiAnalysis

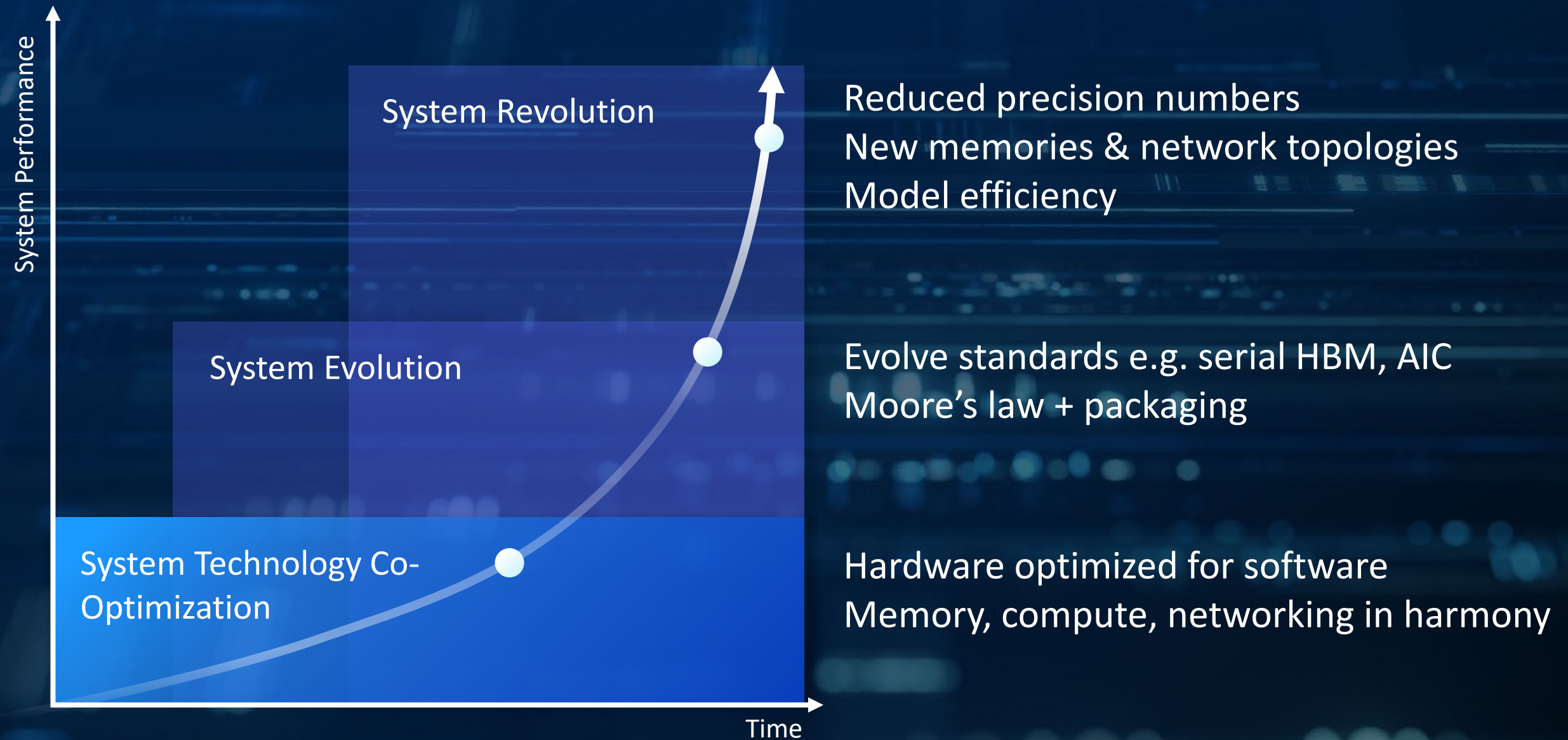
Challenge: Mismatch In Scaling



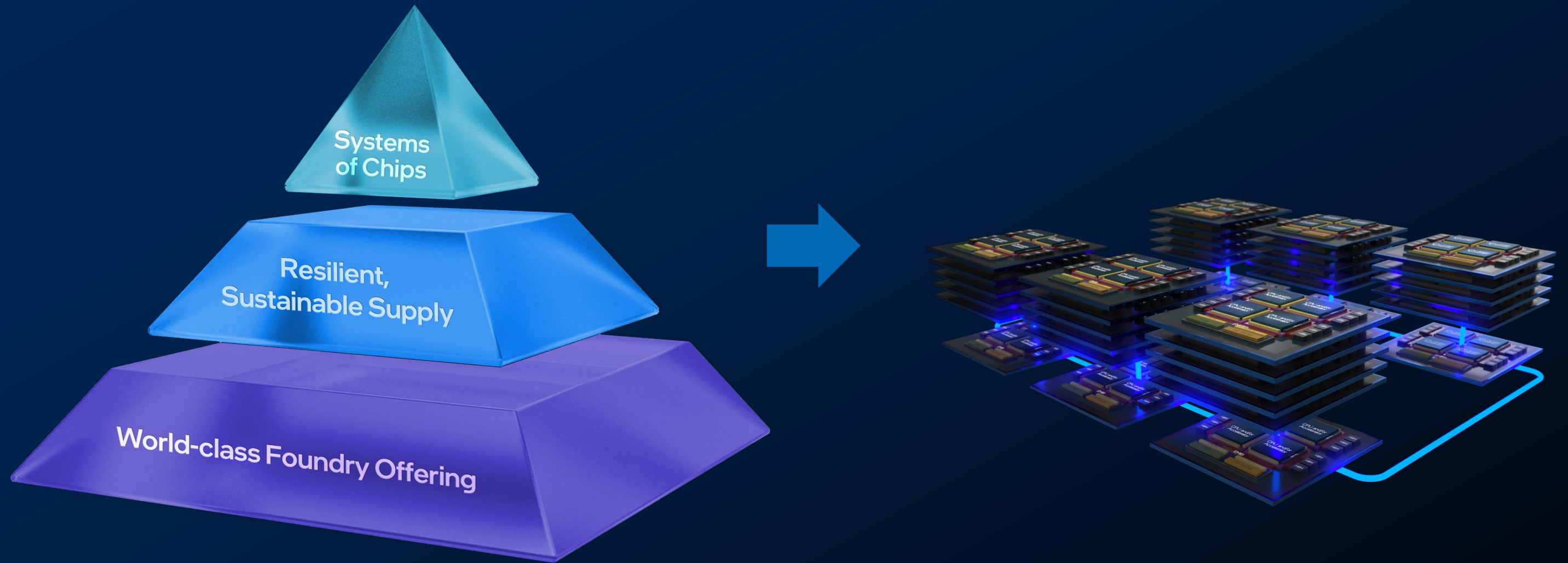


The Path Forward

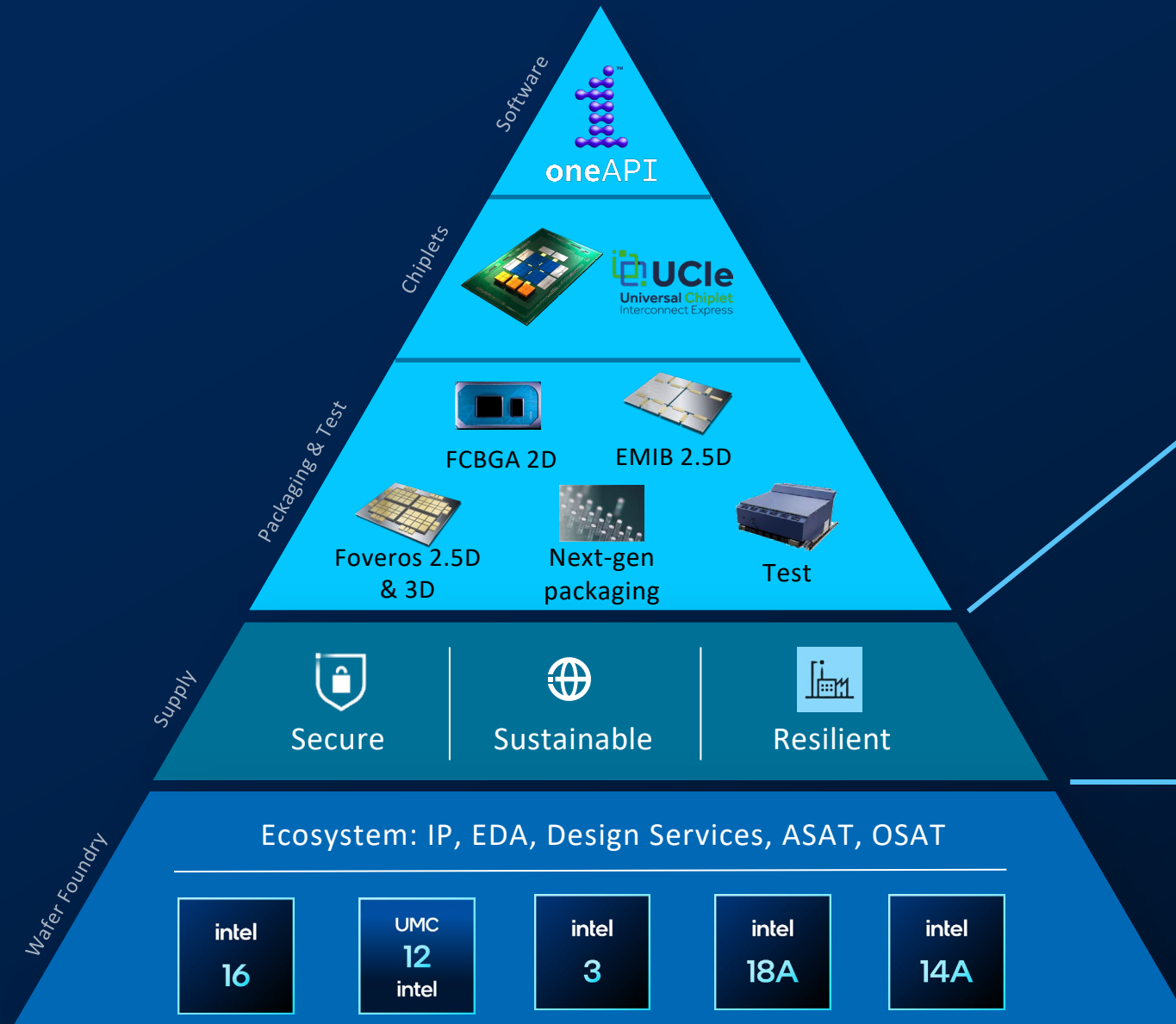
Systematic Path to Exponential Improvement



Heterogeneous Integration & Systems Foundry



Systems Foundry For The AI Era



3

Systems of chips expertise & technology
Technologies, services, specialized infrastructure & experience to produce at scale with optimal PPA and yield

2

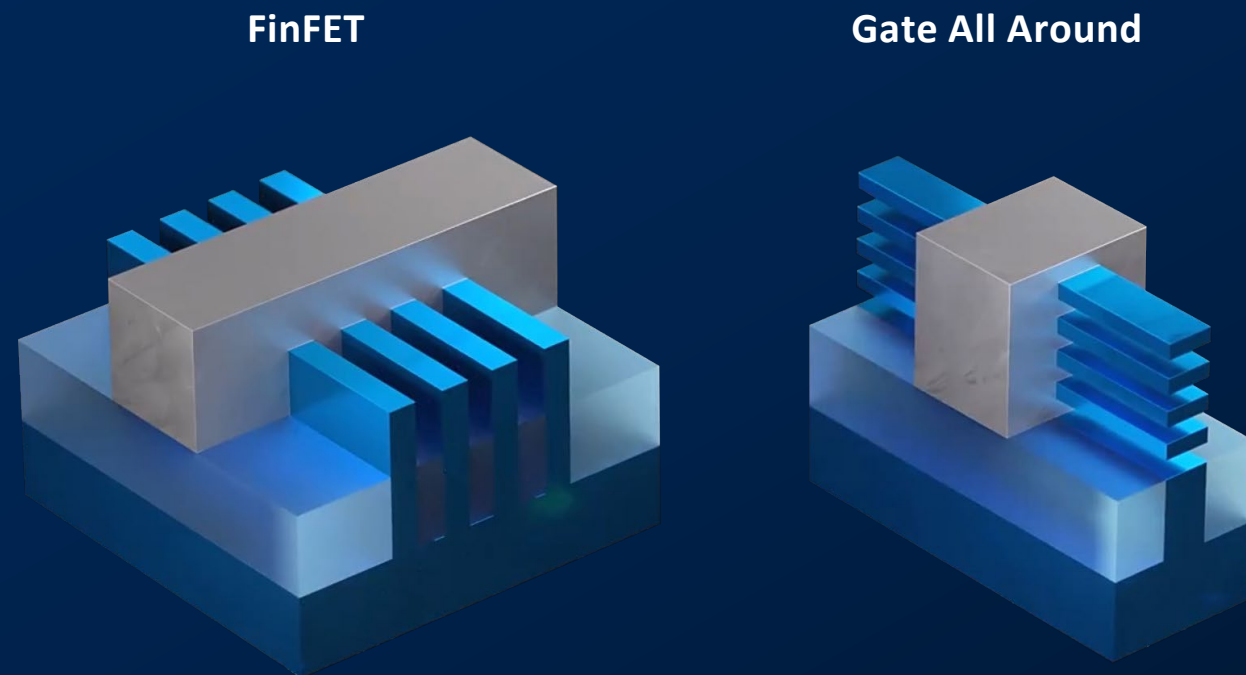
Resilient, more sustainable supply
Sustainably reduces risk for your business

1

World class foundry offering with advanced nodes
Advanced nodes enabled by your trusted eco-system partners

Angstrom Era Silicon Innovations

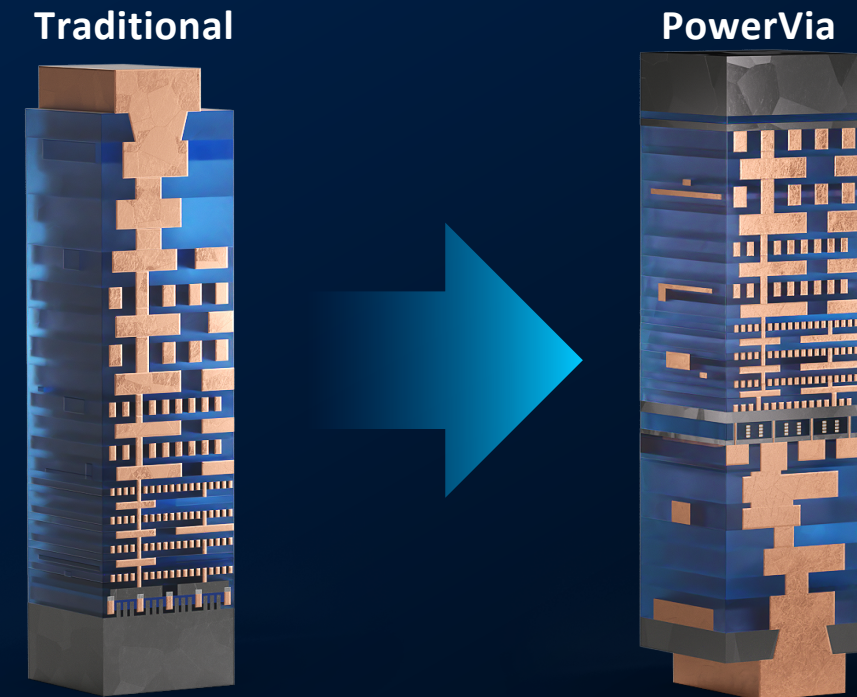
RibbonFET Transistors



Innovation In Transistors

Better electrostatics compared to FinFETs
Optimized ribbon architecture for best Perf/W & Vmin

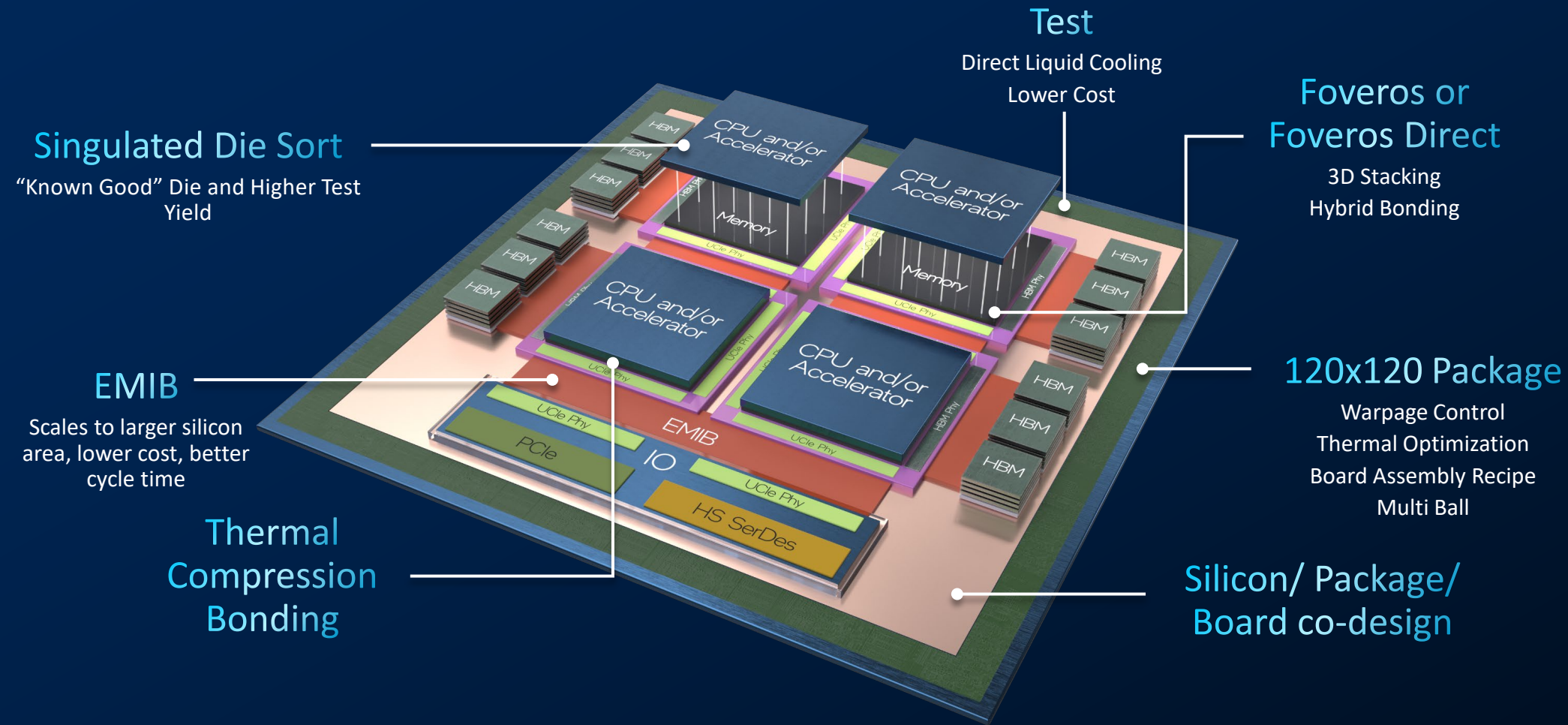
PowerVia Interconnects



Innovation in Interconnect

Improved density & cell utilization
Reduced resistive power delivery droop

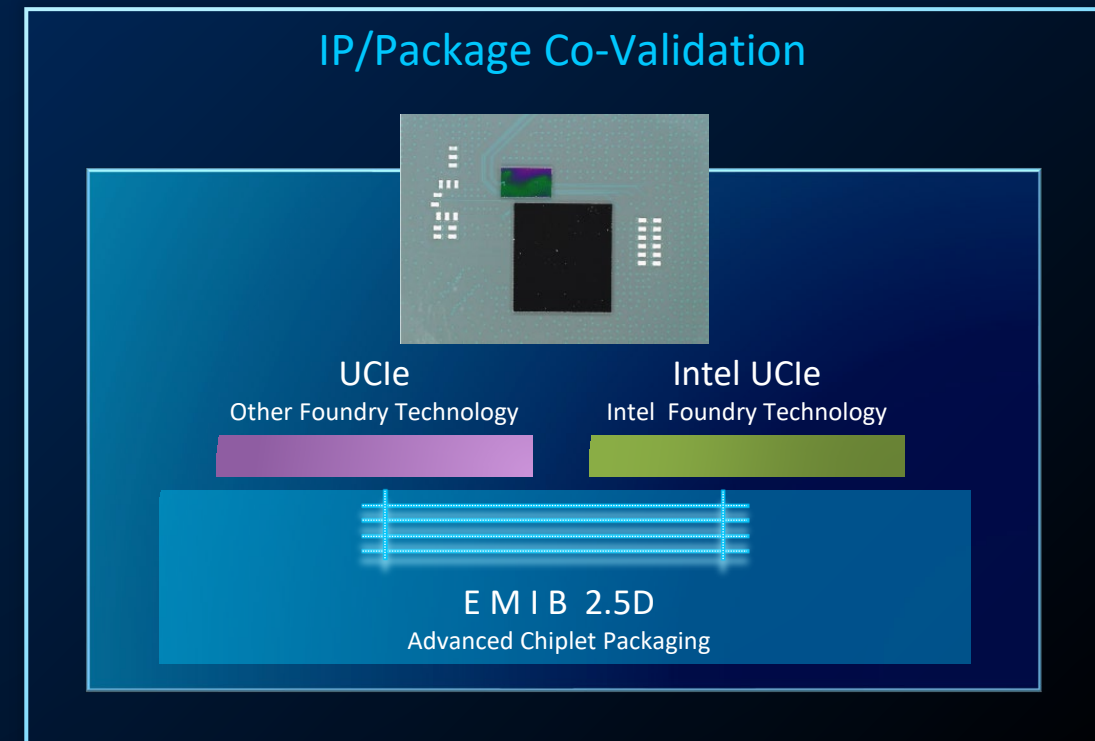
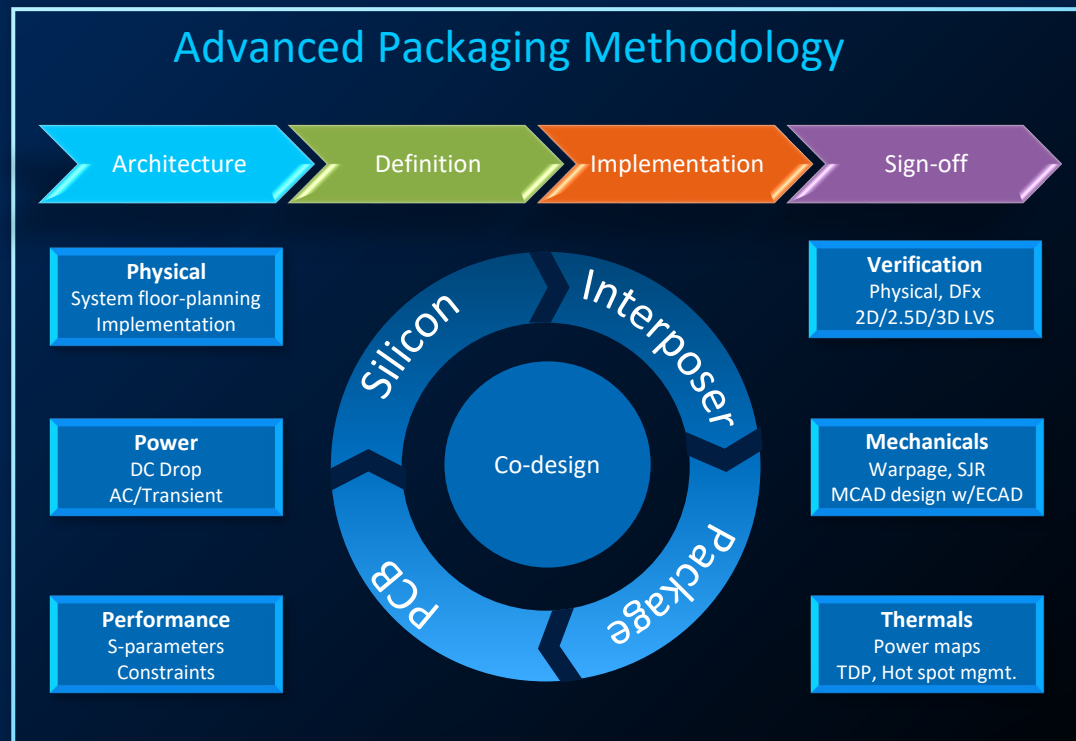
Advanced Packaging, Assembly and Test Differentiation In Action



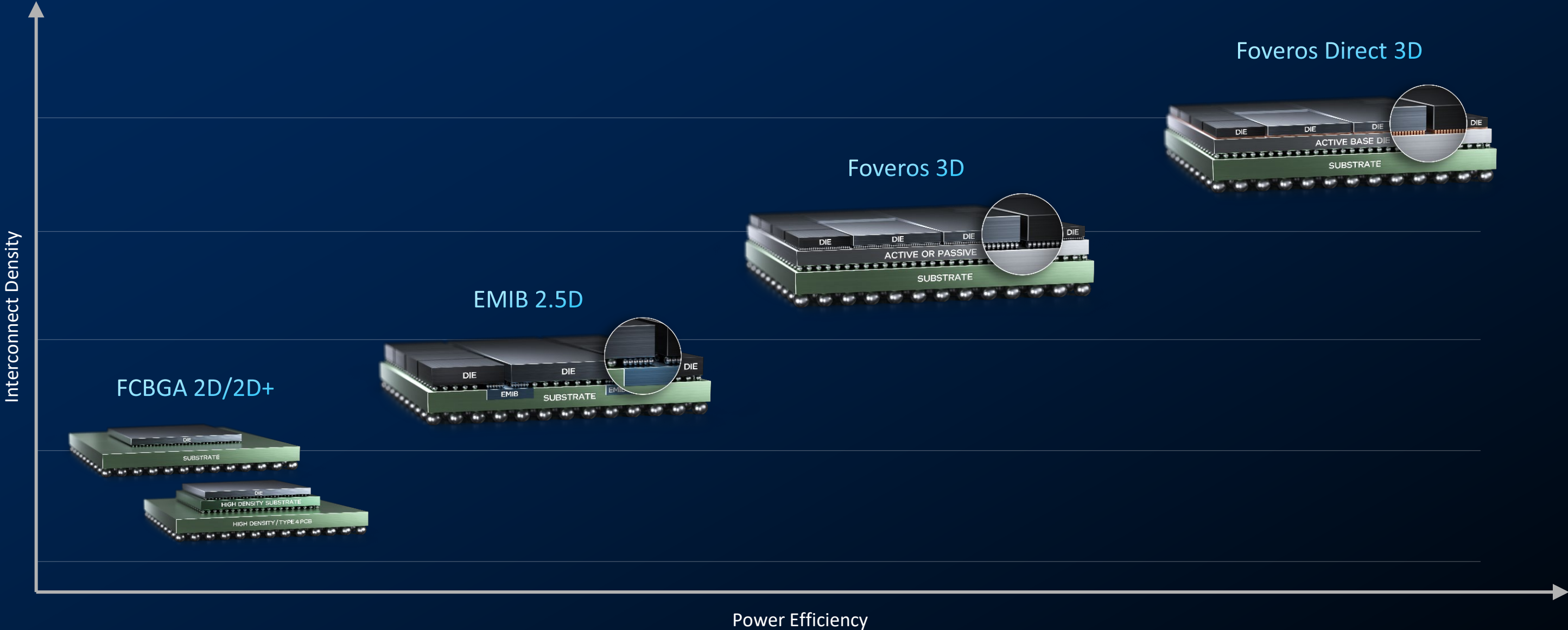
Comprehensive technology, design, and manufacturing to enable System-Technology Co-Optimization (STCO)

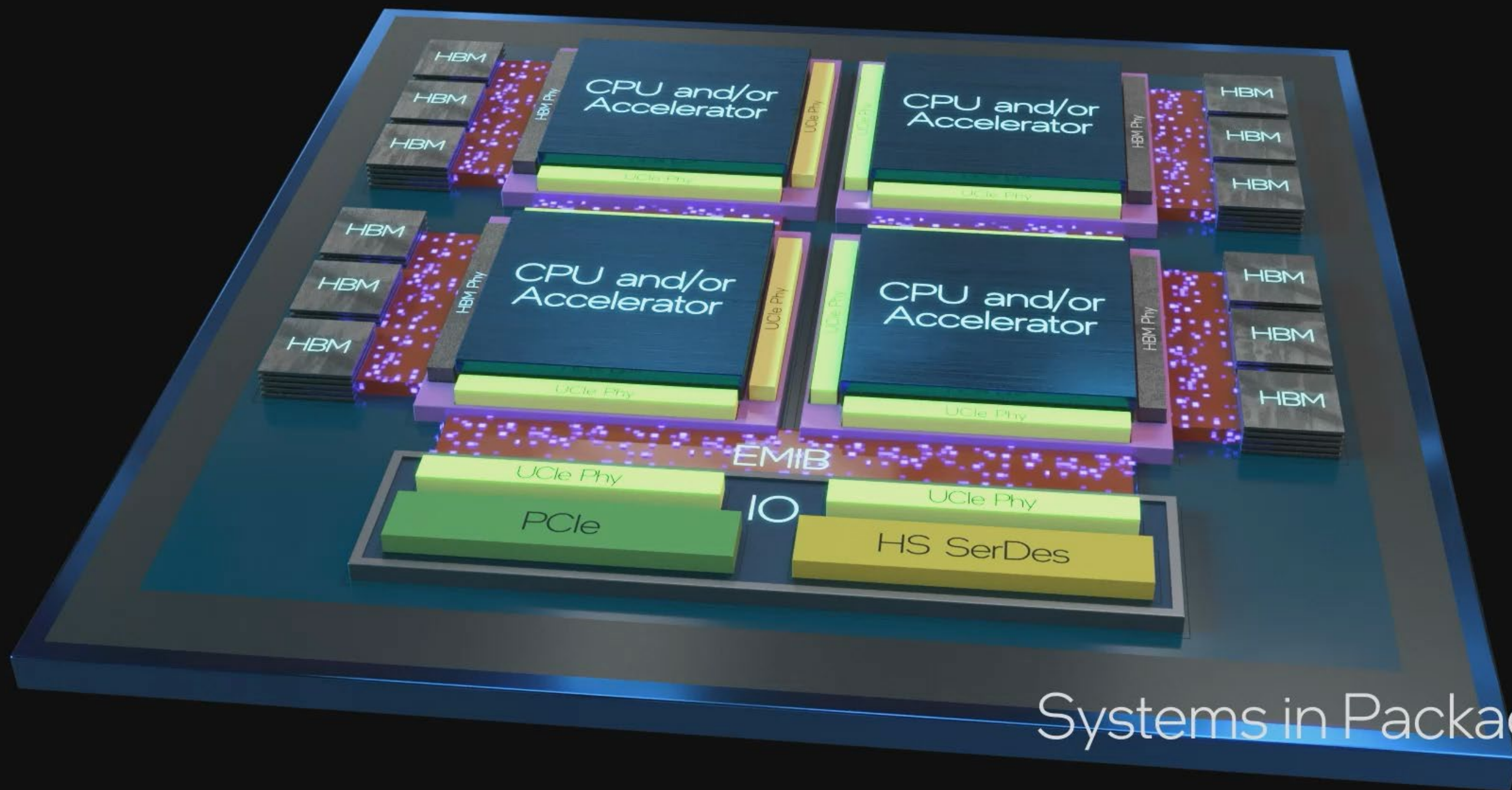
Systems Foundry Approach to Design Enablement

Design enabling from concept to tapeout ensuring successful system-of-chips product development



Enhancing Integration and Power Efficiency





Systems in Package

Sustainable Systems Innovations for AI's Next Frontier

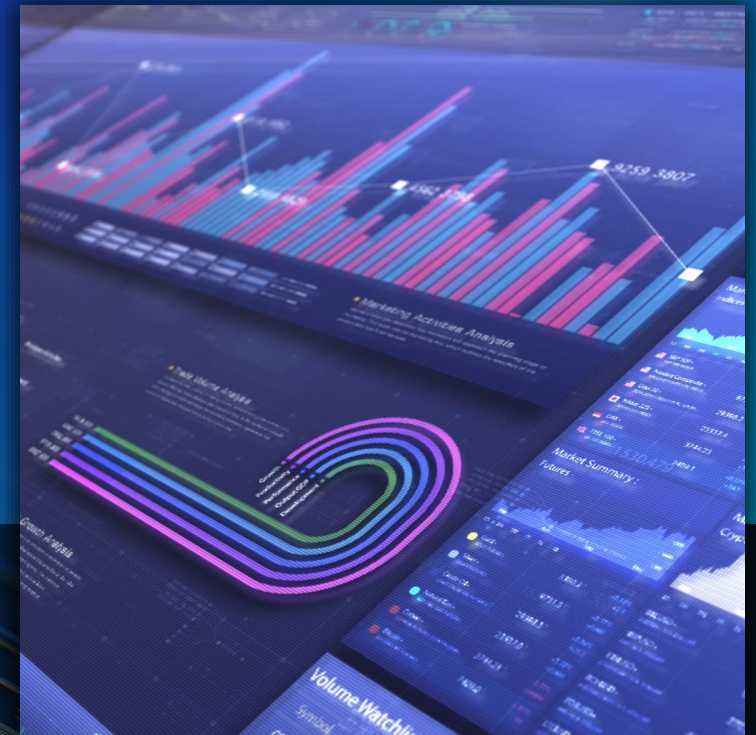
Turning a Corner



Truly Differentiated



Results



Notices and Disclaimers

For notices, disclaimers, and details about performance claims, visit www.intel.com/PerformanceIndex or scan the QR code:



Learn more at www.Intel.com/ProcessInnovation.

All product and service plans, and roadmaps are subject to change without notice

Statements in this document that refer to future plans or expectations are forward-looking statements. These statements are based on current expectations and involve many risks and uncertainties that could cause actual results to differ materially from those expressed or implied in such statements. For more information on the factors that could cause actual results to differ materially, see our most recent earnings releases, annual report on form 10-K and other SEC filings at www.intc.com.

Intel is committed to the continued development of more sustainable products, processes, and supply chain as we strive to prioritize greenhouse gas reduction and improve our global environmental impact. Where applicable, environmental attributes of a product family or specific SKU will be stated with specificity. Refer to the 2022 Corporate Responsibility Report for further information.”

© Intel Corporation. Intel, the Intel logo, and other Intel marks are trademarks of Intel Corporation or its subsidiaries. Other names and brands may be claimed as the property of others.

intel foundry

We were made for this