

SEMI GLOBAL UPDATE

October 28, 2025

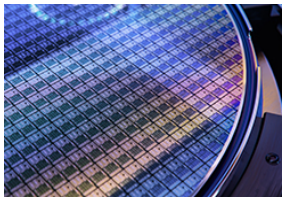
What's New at SEMI



Market Intelligence

SEMI Reports Global Silicon Wafer Shipments to Rebound 5.4% in 2025

Silicon wafer shipments rose in 2025 due to AI growth, and further increases are expected through 2028 as AI expands in data centers and edge computing.



Market Intelligence

The Plateau Paradox: Why the Semiconductor Plateau Is Not a New Cycle, But a Structural Constraint

This quarter's analysis shows the semiconductor cycle entering an extended peak plateau, marked by efficiency-focused operations and portfolio adjustments.



Workforce Development

NNME Debuts ChipPath as the Central Gateway for U.S. Semiconductor Careers

"ChipPath is more than a job board, it's a bridge to opportunity," said Shari Liss, Vice President of Workforce Development and Initiatives at SEMI.



Global Advocacy

SEMI Advocacy Update: U.S. Department of Commerce Amended Notice of Funding Opportunity (NOFO)

While focus remains on the suppliers of semiconductor manufacturing materials and equipment, learn how the amended NOFO version differs from the original.



Markets and Business

How Nations Can Achieve Realistic Semiconductor Self-Sufficiency

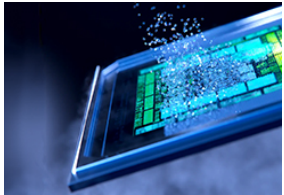
SEMI member company Stanton Chase shares their insights on the quest for self-sufficiency and the importance of building and managing resilient networks.



SEMI News

SEMI Announces Update to International Board of Directors

Terry Higashi has been elected to the SEMI International Board and six board members have been reelected.



SEMI-Related

IEEE Spectrum: Diamond Blankets Will Keep Future Chips Cool

Get insight into research demonstrating how a polycrystalline diamond coating that is micrometers-thick spreads out the heat in chips.

Upcoming Events/Webinars

Nov 4-6	Electronic Specialty Gases & Systems Conference—ESGS 2025 Chandler, Arizona Mountain Standard Time
Nov 5	FLEX Master Class 27—Digital Twin Models for Semiconductor Manufacturing Unit Process Virtual Pacific Time
Nov 5	Implementing Basic Cybersecurity Principles in Semiconductor Manufacturing Virtual Pacific Time

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