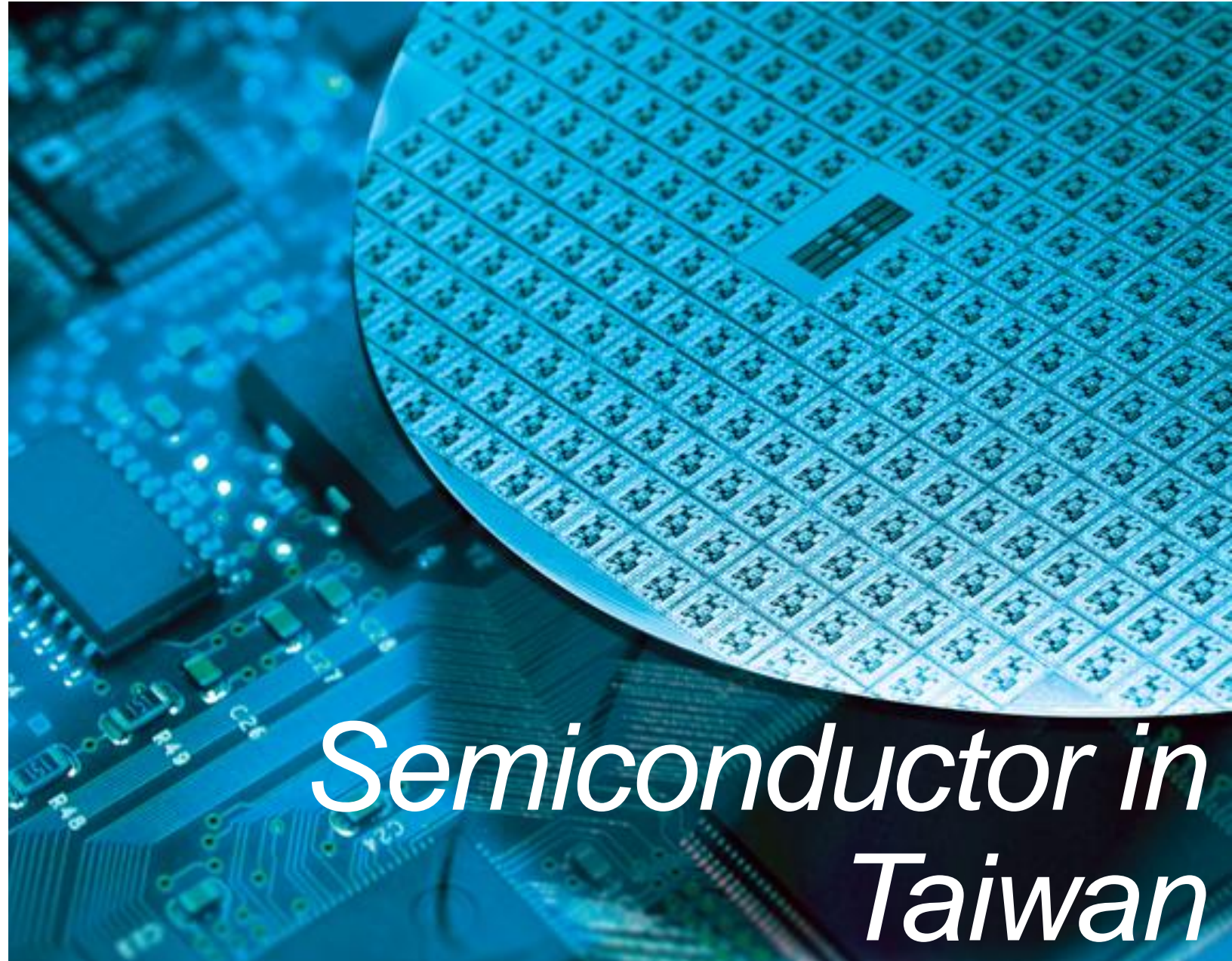


Netherlands



Netherlands
Office Taipei
荷蘭在台辦事處

NL



*Semiconductor in
Taiwan*

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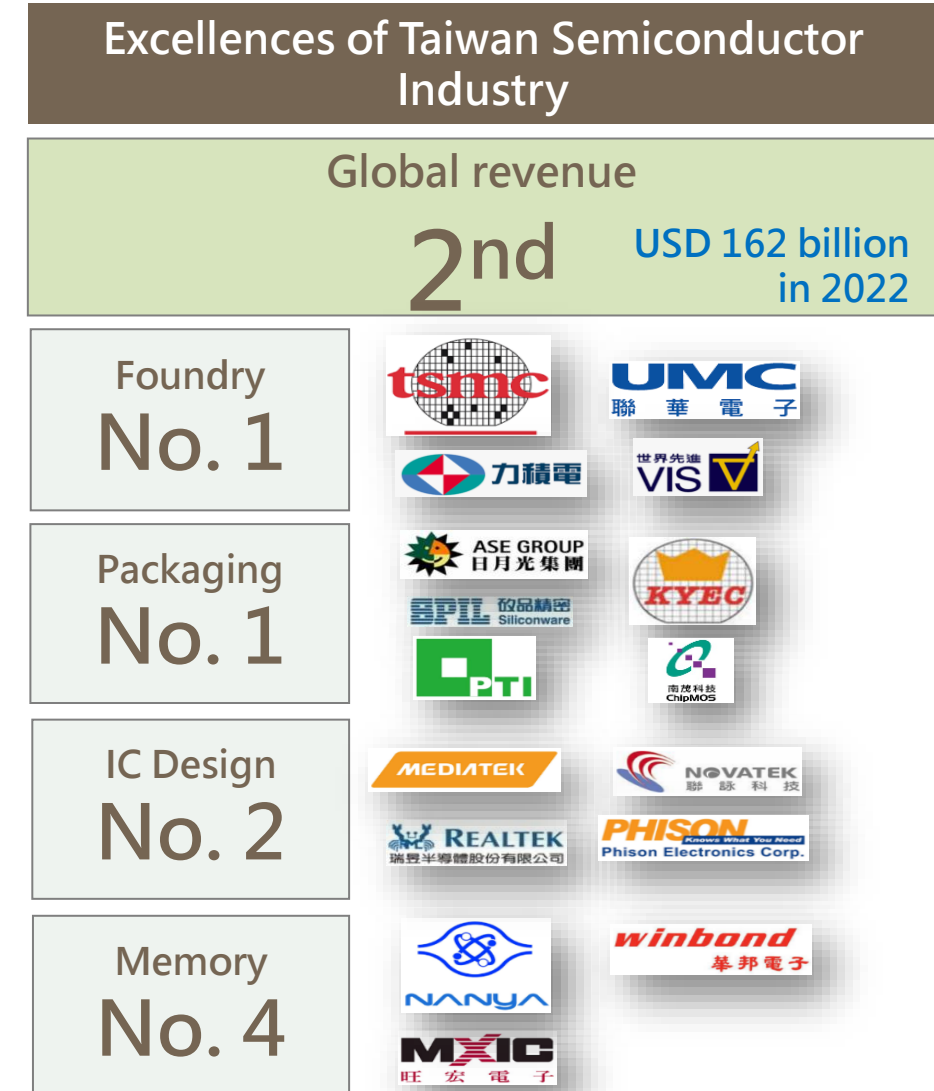
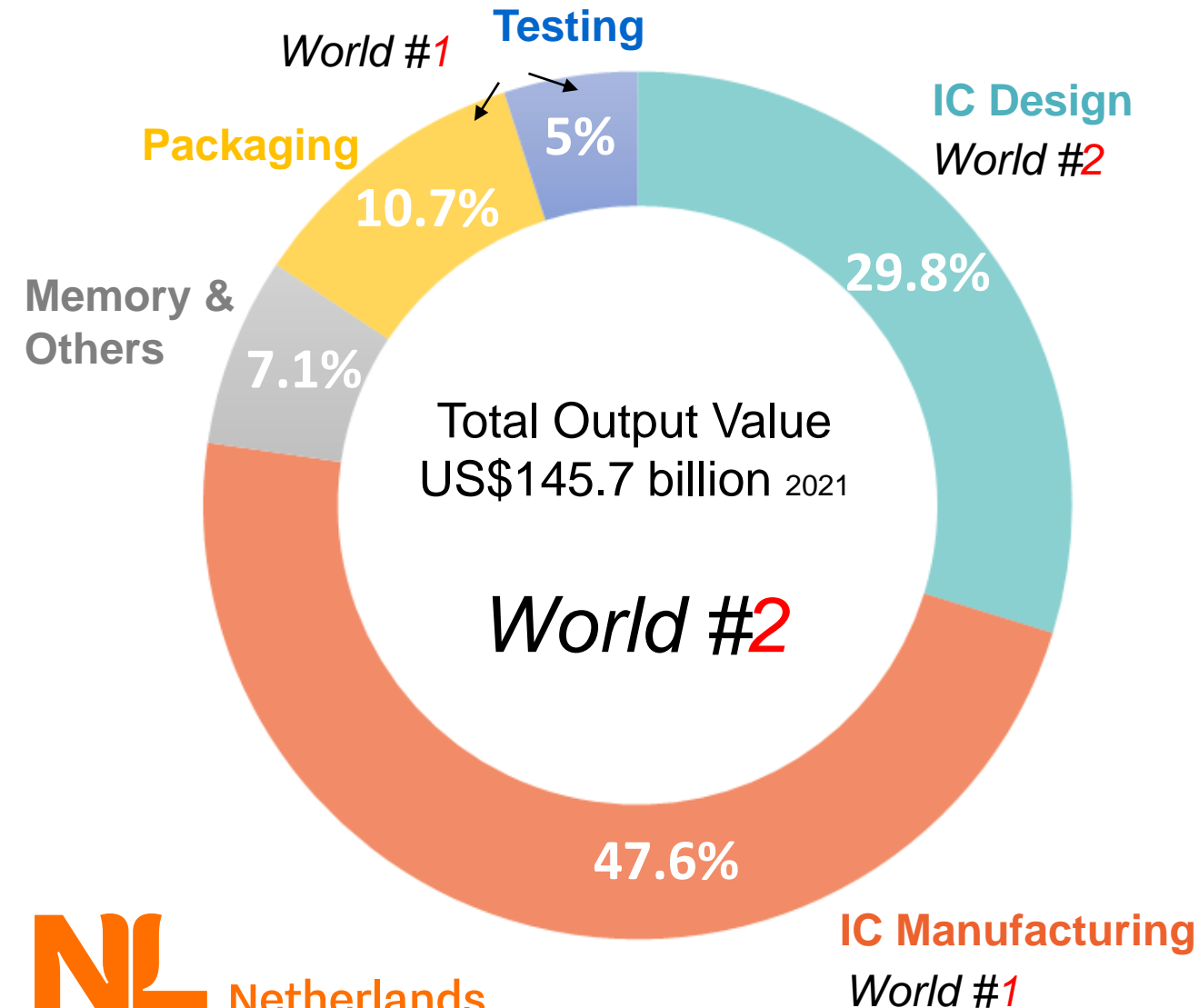
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World's 2nd largest player in IC industry



SOURCE : ISTI, Industrial Technology Research Institute

2021 Top 10 Semiconductor Companies in Taiwan

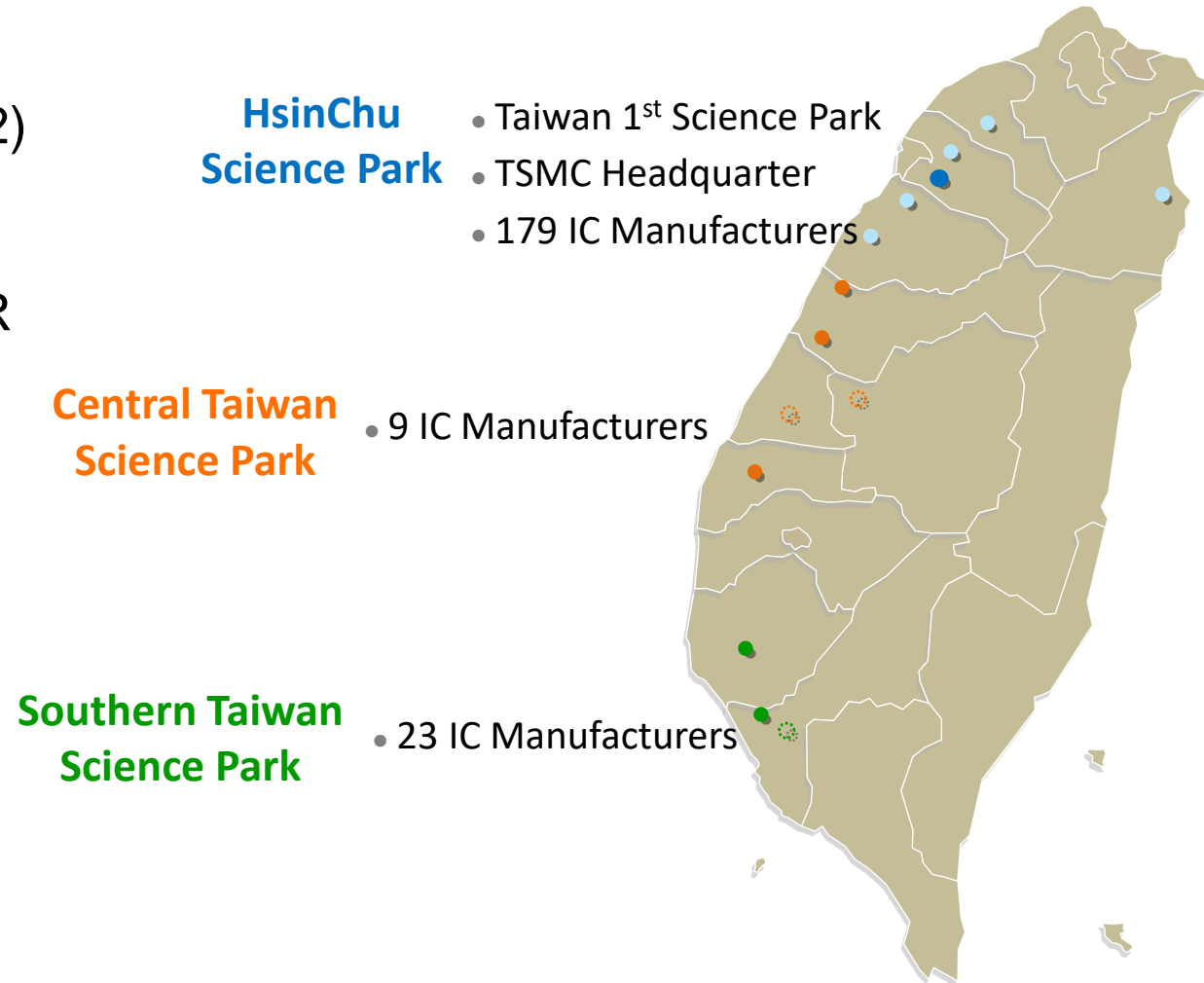
Ranking	Company	Type
1	TSMC	Foundry
2	MediaTek	IC Design
3	ASE Group	IC Packaging & Testing
4	United Microelectronics Corporation	Foundry
5	Novatek Microelectronics	IC Design
6	Realtek Semiconductor Corp.	IC Design
7	Winbond Electronics Corp.	Memory Manufacturing
8	Nanya Technology	Memory Manufacturing
9	Powertech Technology Inc.	IC Packaging & Testing
10	Powerchip Technology Corp.	Foundry

A STRONG and MATURE ECOSYSTEM

- IC products contribute 34,8% of total exports in 2021.
- **More than 90%** of the advanced chips (process nodes below 10 nanometers) is coming from **Taiwan**.
- By the end of 2020, Taiwan semiconductor industry consisted of **238 IC fabless design houses, 13 fabrication companies, and 37 packaging and testing houses**. It also included substrate suppliers, wafer suppliers, mask makers, and lead frames companies.

Everything on One Island

- Size is similar to NL (37 vs 41.000km²)
- Total 14 science parks (incl in development/ planning)
- 2.5 Hours from North to South by HSR



Comprehensive ICT Ecosystem in Taiwan

IC

IC Design : MTK, Novatek, Realtek

IC Foundry : TSMC, UMC

IC Assembly/Test : ASE, SPIL

MEDIATEK

NOVATEK

REALTEK



UMC



SPIL

Display

AUO, INNOLUX, CPT, PVI

AUO

INNOLUX

Eink

元太科技

PCB

Unimicron, Nan Ya PCB, Tripod, Compaq, Hannstar Board, Chin Poon, Kinsus, Careergroup

Unimicron
COMPEQ
華通電腦股份有限公司



TRIPOD
TECHNOLOGY CORPORATION
KINSUS

Connector

Hon Hai/ Foxconn, Foxlink, LOTES, P—TWO, Adanced Connectek, Alltop.

鴻海

LOTES

P-TWO

CON

Optical component

Optotech, Everlight, TYNTEK, EPISTAR, I-CHIUN PRECISION, Unity Opto, Formosa Epitaxy

OPTOTECH



EPISTAR
晶元光電

I-CHIUN



FOREPI

Passive component

Yageo, Walsin, Holy Stone, LELON, Chilisin, TA-I Chilisin, TKS, Ralec,

YAGEO

WALSH

CHILISIN
立隆電子工業
LELON ELECTRONICS CORP.

Battery

Simplo, Dynapack, Foxlink, Welldone, C-TECH, E-ONE

SMP

DynaPack
順達科技股份有限公司

FOXLINK

Thermal Module

Chaun Choung, Yeh-Chiang, Asia Vital Components, Forcecon, AURAS

CCI

YCTEK

AVC

Electronic Materials

Taiflex, Fulltech, Taiwan Glass, Giga Solar, China Steel Chemical, Young Fast

YOUNGFAST

TAIFLEX
台虹科技

KINSUS

GSMC



Next Generation Semiconductors Report

***HPC Chip
Design***

***Semiconductor
Equipment***

***Advanced
Packaging***

***Emerging Tech
- PIC***

Semiconductor Equipment

Current Status

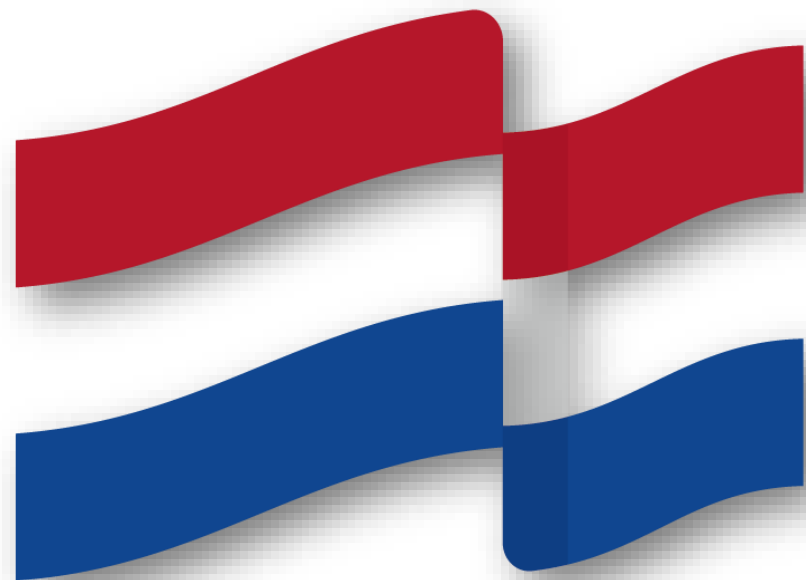
- In 2021, the output of Taiwan's semiconductor equipment industry reached US\$4.23 billion with a growth of 28.7% comparing to 2020.
- The domestic semiconductor industry invested US\$23 billion on equipment purchase. In which US\$20 billion of the investment was spent on overseas equipment purchase.

Future Focus & Trend

- Government's policy aims to make Taiwan an advanced manufacturing process center for semiconductors.
- To localize equipment production operations of foreign companies.
- To localize the advanced packaging equipment.

Opportunity

- Collaborate for local development (*extend existing collaborations BESI, Trymax, Boschman, Tempres, Nearfield Instruments etc.*)
- Co-develop equipment for next generation semiconductor applications /packaging with customer's demand and markets (*new R&D opportunity for Demcon, ProDrive, TNO, ..*)



ASML

Office Taipei

荷蘭在台辦事處

- ASML netto omzet uit Taiwan = **21 Miljard** = 38.2%
- ASML announced **huge investment** plans in Taiwan

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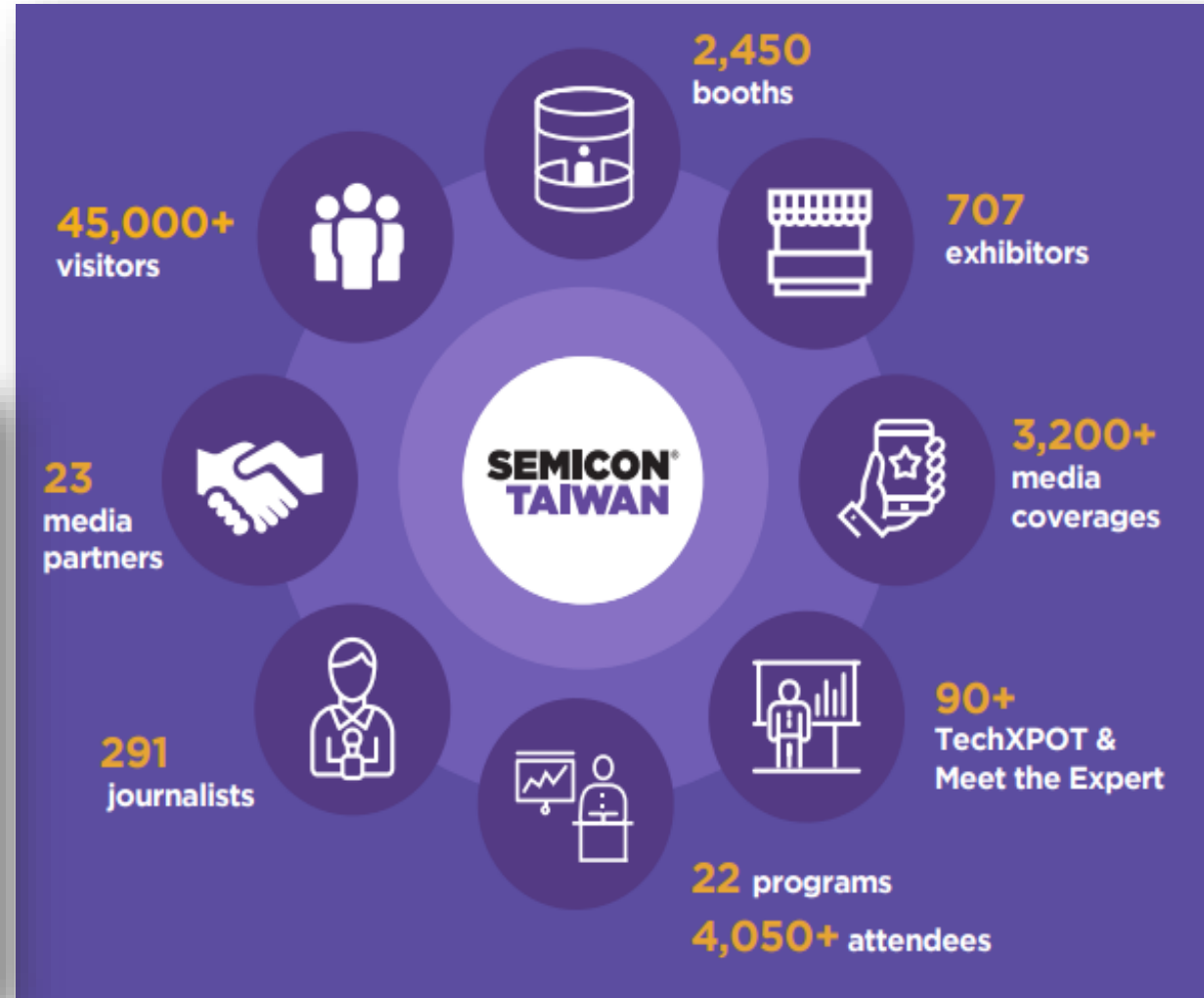
Part 4: *Parallel* Innovation Mission

The Largest Semiconductor Event in Taiwan

SEMICON Taiwan 2023

Location: Taipei, Taiwan

Date: 06. – 08. Sep



The Largest Semiconductor Event in Taiwan

Optional: Leadership Gala Dinner

Exclusive networking opportunity that connects with 600 VIPs in Taiwan semiconductor industry.

Location: Taipei, Taiwan Date: 06. Sep

2023 Leadership Gala Dinner 18:00-21:00 | Sept. 6th

Organizers:



Co-organizer:



2022 Sponsors:



Connect with Industry Leaders



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NL High-Tech National Pavilion



NL pavilion mission

Program elements:

- 3 day SEMICON Taiwan
- Logo/ brochure/ product promotion
- Presentation opportunity
- Networking / matchmaking
- Field trip



NL Pavilion Mission Program (tentative)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Date	Sept 3	Sept 4	Sept 5	Sept 6	Sept 7	Sept 8
Theme		Prep Up	<u>Round Table / Field Visit</u>	<u>SEMICON Taiwan: Networking Day</u>	<u>SEMICON Taiwan: Matchmaking Day</u>	<u>SEMICON Taiwan</u>
Morning	Fly-in (AMS-TPE)	Cultural Program or/and	NL Delegation Lunch Roundtable or/and	NL Pavilion Promotion & Showcase (e.g. seminar, stage-talk)	1on1 Matchmaking or/and	Exhibition or/and
Afternoon		Field Trip Visit	Field Trip Visit	NL Pavilion Networking Reception or/and Pavilion Seminar	World Cafe Matchmaking at NL Pavilion	Free Time
Evening	Delegation Briefing Dinner			Optional – Gala Diner ! 600 EUROS pp.	Networking Dinner	Debriefing – Tea Party Fly-out (TPE-AMS)

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Innovation Mission

Photonics Integrated Circuits, Advanced Packaging & Heterogenous Integration

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
	Sept 3	Sept 4	Sept 5	Sept 6	Sept 7	Sept 8
Morning	Arrival	<u>NL – TW Innovation Cooperation & Matchmaking Conference</u>	Optional – hike Elephant Mountain <u>NL Delegations Lunch Meeting</u>	<u>SEMICON Taiwan</u> <u>NL Pavilion</u> Bring brochures/ promotion material to showcase at NL Pavilion	<u>NL – TW Technical/ Expert Discussions</u> at Industrial Technology Research Institute (ITRI)	Optional – cultural visit Free time
Afternoon			<u>Company visit ASE Group</u>	<u>Networking Reception</u>	<u>Company Visit TSMC</u>	Free time
Evening	<u>Briefing</u>		Optional – Night Market	Optional – Gala Diner ! 600 EUROS pp.	<u>Networking Dinner</u>	Departure

OTHERS

- NL – TW High Level Semicon Dialogue
- Gala dinner (NL table)
- EUREKA GlobalStars
- Other delegations: UK / Sweden

I would love to continue
the conversation.

Stay in contact via

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