

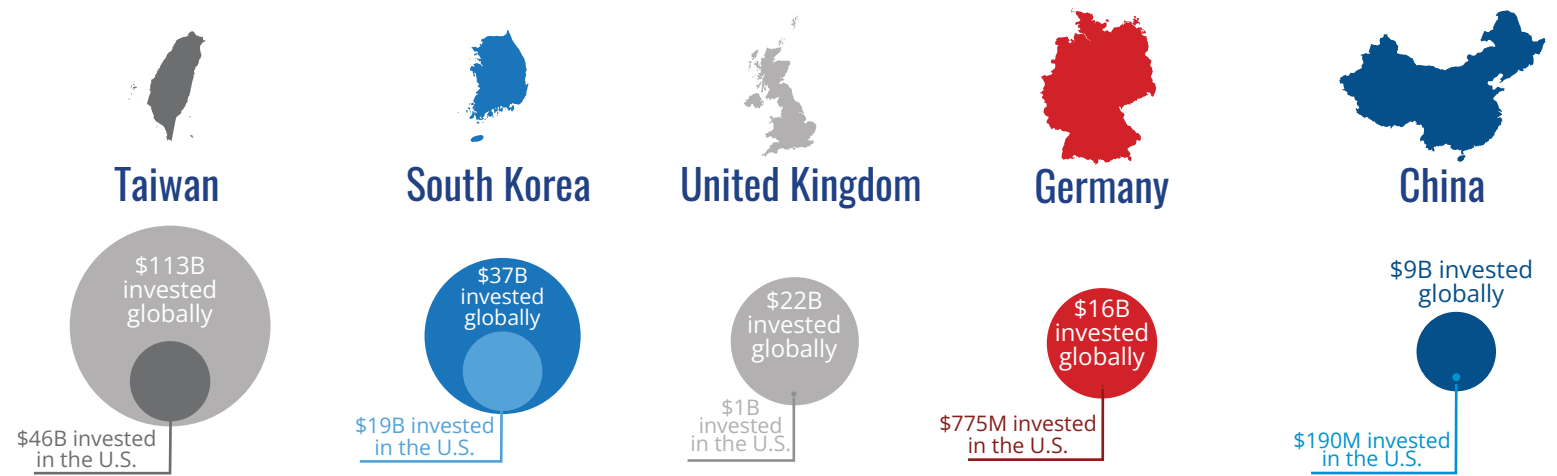
SELECTUSA® International Industry Landscape Semiconductors

A Biden-Harris Administration priority is keeping the United States' semiconductor supply chain secure, robust, and resilient for the national security and economic prosperity of the United States. In 2022, President Biden signed the CHIPS and Science Act into law, announcing a nearly \$53 billion investment in U.S. semiconductor manufacturing, research and development, and workforce.¹ Since the introduction of the CHIPS and Science Act, dozens of investment projects in the semiconductor industry have been announced, resulting in over \$395 billion of commitments to invest.² These projects will create tens of thousands of new, high-quality jobs, as well as hundreds of thousands of supported jobs throughout the broader U.S. economy.³ With these investments, the United States is projected to produce roughly 20% of the world's leading-edge logic chips by 2030.⁴ Furthermore, for the last 10 years, the United States was the top source market and among the top destination markets for greenfield foreign direct investment (FDI) project announcements in the semiconductor sector.⁵

SelectUSA seeks to encourage and maintain the resiliency of the U.S. competitive advantage in this industry by attracting FDI in this critical industry. This snapshot explores top foreign markets of parent companies operating in the semiconductor industry to help economic developers gain a better understanding of the global landscape.

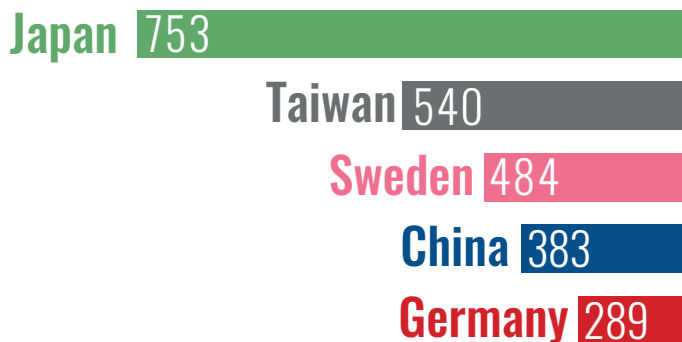


Top Source Markets by Estimated Capital Expenditure in the Semiconductor Industry⁶

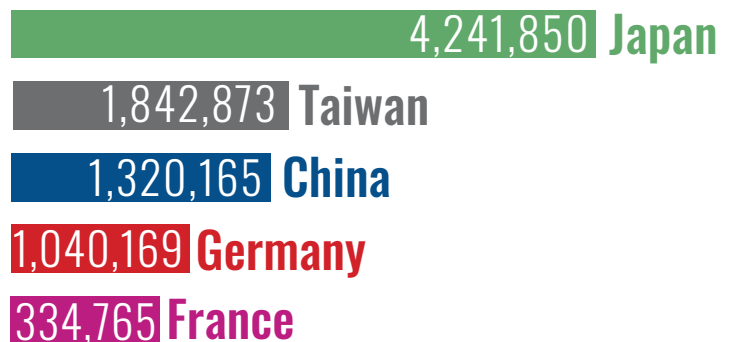


Top 5 Foreign Markets for Global Parent Companies in the Semiconductor Industry⁷

Reported Annual Revenue (in USD billions)



Number of Global Employees



¹The White House, President Biden Takes Action to Protect American Workers and Businesses from China's Unfair Trade Practices.

²Accessed May 2024. The White House, Investing in America Public Investment Map.

³Semiconductor Industry Association, State of the U.S. Semiconductor Industry.

⁴National Institute of Science and Technology, "Biden-Harris Administration Announces Preliminary Terms with Samsung Electronics to Establish Leading-Edge Semiconductor Ecosystem in Central Texas."

⁵FDI Markets, January 2014-December 2023.

⁶FDI Markets, January 2014-December 2023.

⁷Uniwold is an online database reporting business contact information from over 200 countries and 20,000 industries. Accessed March 2024. Data includes foreign parent companies operating in the North American Industry Classification (NAICS) industry code 3344 and exclude any companies that do not report either annual revenue or number of employees. This dataset does not reflect all companies in the semiconductor industry.

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International Industry Landscape

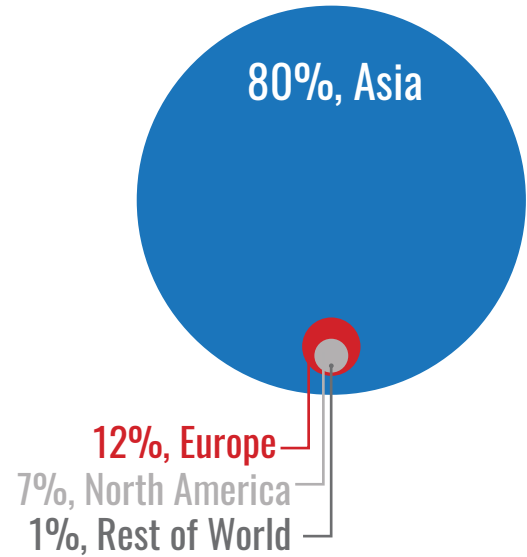
Semiconductors

Semiconductor Industry Exports

Globally in 2022, semiconductor and other electronic component manufacturing industry goods exports were valued at \$1.8 trillion.⁸

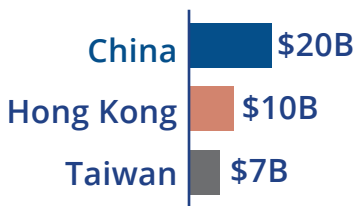
Regionally, Asia has the largest share of semiconductor exports by trade value, accounting for 80 percent of global exports in 2022. Europe (12 percent) and North America (7 percent) followed with the next largest shares.⁹

Economic developers may consider trade flows to identify where major semiconductor and other electronic component manufacturing industry production is located.

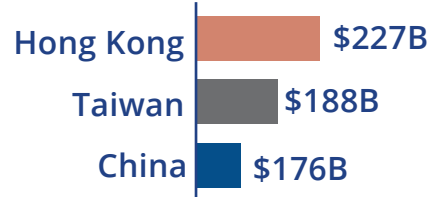


Top 3 Markets in Major Semiconductor Subsectors by Export Value¹⁰

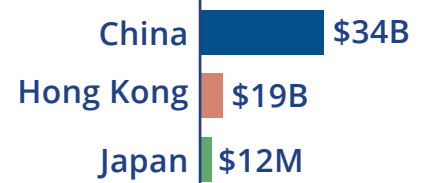
Bare Printed Circuit Board Manufacturing (USD)



Semiconductor and Related Device Manufacturing (USD)



Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing (USD)



How We Can Help

SelectUSA is the U.S. federal government investment promotion program that facilitates and promotes job-creating business investment into the United States. SelectUSA's team of experts support U.S. Economic Development Organizations in their location promotion plans by providing credible and unbiased data, analytics, and on-the-ground information from embassies and consulates across more than 70 foreign markets.

Email SelectUSA@trade.gov to be connected with an Investment Specialist.

⁸Accessed March 2024. Data is sourced from the United Nations COMTRADE database with SelectUSA calculations to determine the value of exported goods by industry and subsector.

⁹Accessed March 2024, United Nations COMTRADE database.

¹⁰Accessed March 2024, United Nations COMTRADE database.