



**Capital  
Markets  
Day 2022**

**Leverage and accelerate  
for continued sustainable  
profitable growth**

**Jean-Marc Chery**

President & CEO

# Our value proposition for all stakeholders

For our shareholders



Return value in line with our objective

Sustainable and profitable growth

For our customers



Provide differentiating enablers

Independent, reliable & secure supply chain

For all stakeholders



Committed to sustainability

Our values: Integrity – People – Excellence

# Our strategy stems from key long-term enablers

## Smart Mobility



Helping car manufacturers make driving safer, greener and more connected for everyone

## Power & Energy



Enabling industries to increase energy efficiency everywhere and the use of renewable energy

## Internet of Things & Connectivity



Supporting the proliferation of smart, connected IoT devices with products, solutions & ecosystems

# Maintaining our strategic focus

## Automotive



Lead in **car electrification**



Lead in **car digitalization**

## Industrial



Lead in **embedded processing**



Lead in **Power & Energy Management**



Lead in **Sensors**



Accelerate in **Analog**

## Personal electronics



Lead in **selected** high-volume **smartphone** applications with differentiated products or custom solutions



Leverage **broad portfolio** to address high-volume applications

## Communications Equipment, Computers & Peripherals

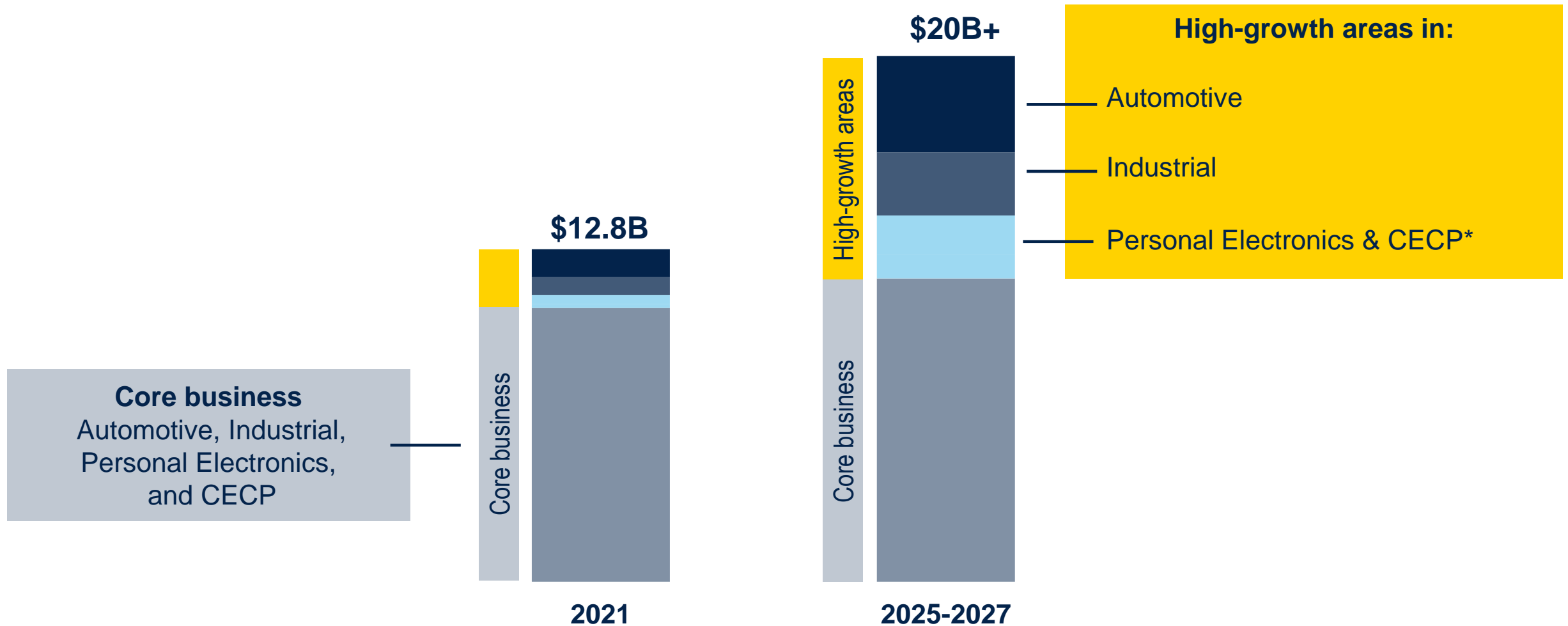


Address **selected** high-volume **applications** with differentiated products or custom solutions

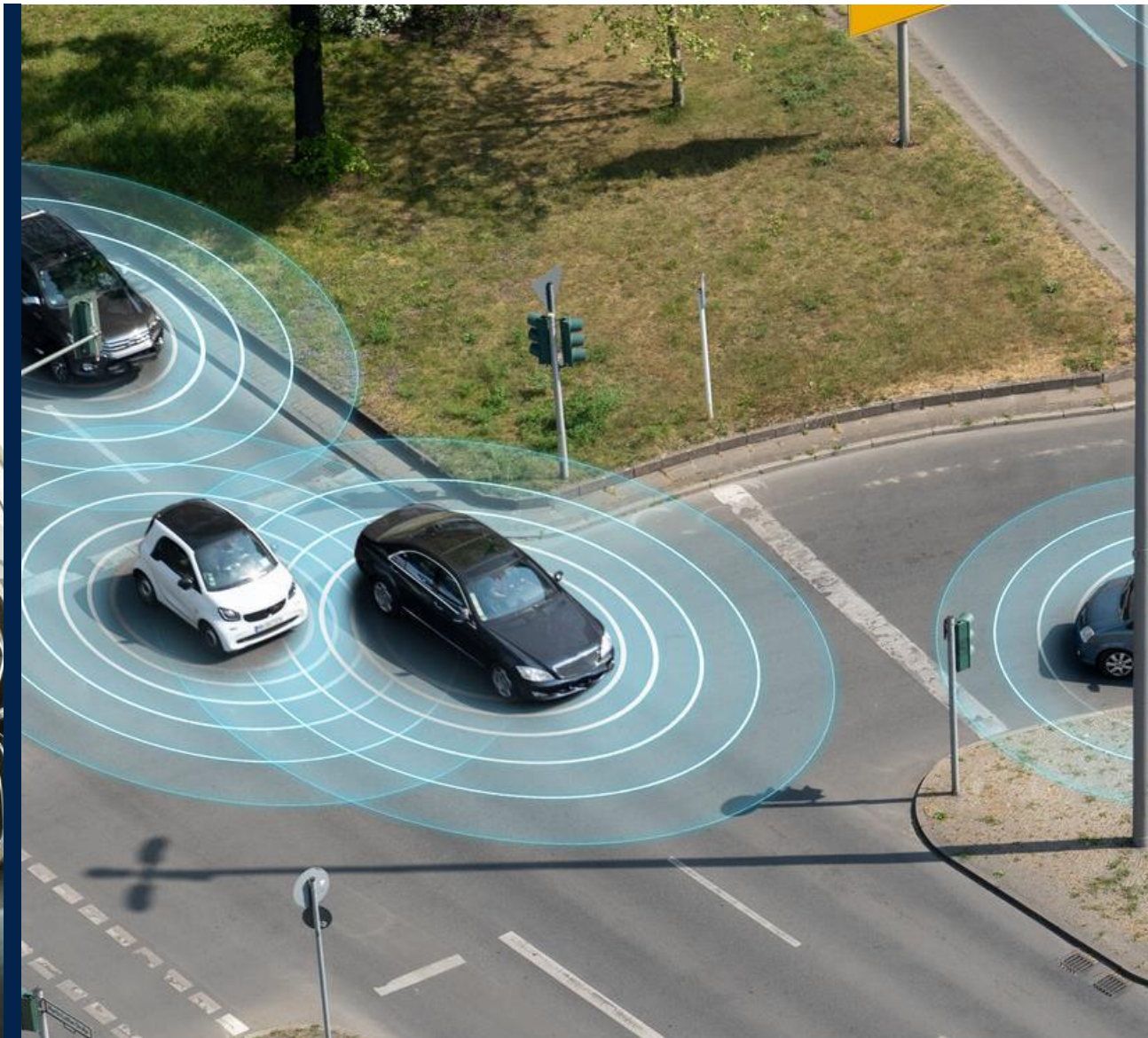


Leverage **broad portfolio** to address high-volume applications

# Leveraging high-growth areas in all end-markets



# Automotive growth driven by electrification and digitalization



# Strong industrial market growth opportunity for ST

## Digitalization & cloudification



## Energy management & power efficiency



# ST's go-to-market approach in industrial

**Factory automation  
& Industrial infrastructure**



~ 65% of ST SAM in 2025

**Consumer  
industrial**



~ 25% of ST SAM in 2025

**Specialized  
industrial**



~ 10% of ST SAM in 2025



# Complete solutions for industrial applications

## Battery management



### ST solutions

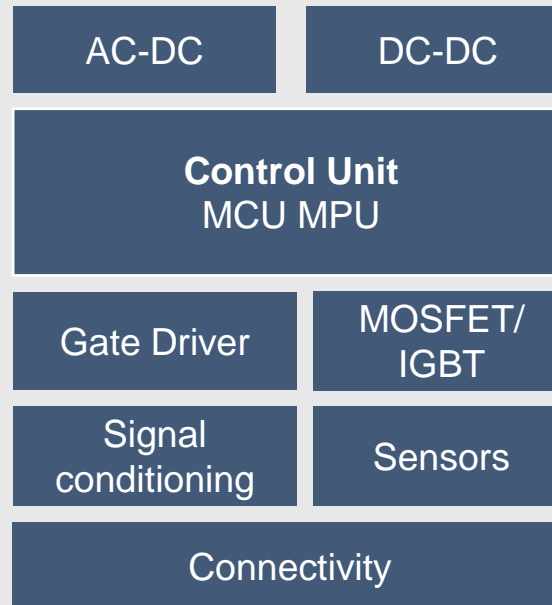
- STM32 Microcontrollers
- Sensors
- Analog signal processing ICs
- Wide bandgap & silicon power discretes
- Galvanic isolated drivers
- Wired and wireless connectivity

## Factory automation



### ST solutions

- STM32 Microcontrollers & Microprocessors
- Motion, environmental and optical sensors
- Wide bandgap & silicon power discretes
- Analog signal processing ICs
- Galvanic isolated drivers
- IO-Link & industrial Ethernet



# Personal electronics remains a key area of focus and a growth opportunity



# Accelerated digital transformation in communications equipment, computers & peripherals





**Leverage and accelerate –  
for continued sustainable profitable growth**











# Long-term enablers are accelerating semiconductor content in our markets

## Trends

### Smart Mobility

Car electrification  
Car digitalization  
ADAS

### Power & Energy

Electrification of everything  
Energy management & power efficiency  
Energy infrastructure

### Internet of Things & Connectivity

Connected, autonomous objects in the IIoT  
Digitalization of industrial applications  
Satellite communications  
Smartphones & accessories

## ST high-growth areas

### ADG

Power Discretes for automotive & industrial – SiC, GaN, IGBT, Silicon

ADAS vision processors

New vehicle architecture zone controllers

### AMS

Application specific analog – wireless charging, smart grid, power conversion

Optical sensing solutions

MEMS sensors & actuators

### MDG

Industrial embedded processing – STM32 wireless, secure, AI-enabled MCU & MPU

GHz wireless – Infrastructure & edge solutions with proprietary technologies

# Our technology starts with You



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