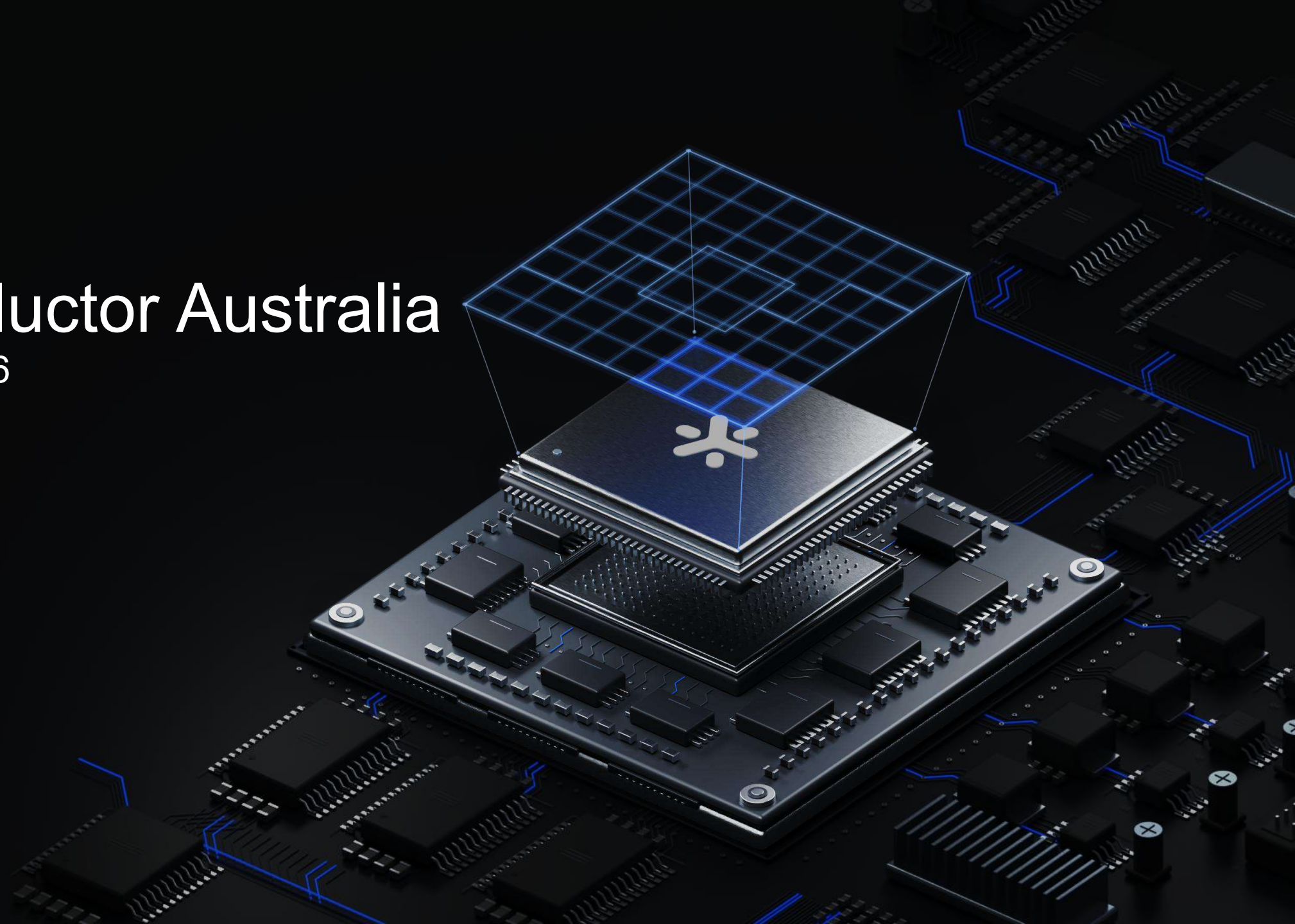
brainchip

Semiconductor Australia
Conference 2026

Sean Hehir
CEO

22 October 2026




22
83
300

Global Semiconductor Ecosystem

- **IDMs** — Design chips and operate their own fabs
- **Fabless Semi** — Design chips; outsource fabrication
- **IP / EDA** — Reusable chip IP and/or chip-design software
- **Design Houses** — Custom ASIC design and turnkey services
- **OSAT** — Outsourced chip assembly, packaging and testing
- **Supply Chain** — Production support, PCB/EMS and logistics
- **Foundry** — Fabricate chips for other companies

1 NORTH AMERICA

Fabless Semi
- NVIDIA
- Broadcom — Also custom silicon
- Qualcomm — IP · includes Alphawave
- AMD
- Marvell — Custom · eSilicon via Inphi
- Cirrus Logic
- MPS
- Astera
- Lattice
- Credo
- Cerebras
- SiTime
- Silicon Labs
- Ambarella
- Parade — US / Taiwan operations
- Synaptics
- MaxLinear
- Semtech
- Power Int.
- Groq
- SambaNova
- Etched
- Blaize
- Mythic

IDMs
- Intel — Also Foundry
- Micron
- TI
- ADI — Includes Flex Logix assets

IP / EDA
- **BrainChip (US)** — US office; Australian parent
- Synopsys — eSilicon IP assets
- Cadence
- Rambus — Also fabless products
- CEVA
- SiFive
- MIPS — GlobalFoundries business
- Arteris
- QuickLogic — Also fabless products

OSAT
- Amkor

Foundry
- GlobalFoundries



REGIONAL OVERVIEW
Numbers match the regional panels.

7 ISRAEL

Supply Chain
- E.K.S.S. Microelectronics
- KAL Silicon Technologies (Isr)

Foundry
- Tower (Isr)

2 EUROPE

IDMs
- Infineon
- STMicro
- NXP

IP / EDA
- Arm
- Imagination
- Codasip

Supply Chain
- Presto — ASIC design & test

Design Houses
- ChipGlobe
- ICsense
- Bruco
- Swindon
- Conclusive
- Aion Silicon — Formerly Sondrel

3 MAINLAND CHINA

Fabless Semi
- GigaDevice — Beijing + Singapore HQs
- OmniVision Group — Formerly Will Semi
- HiSilicon
- Horizon Robotics
- Unisoc
- Moore Threads
- Iluvatar CoreX
- Hygon
- Zhaoxin
- Espressif

Design Houses
- VeriSilicon — Also silicon IP

OSAT
- JCET

Supply Chain
- Inno Circuits — PCB / EMS

Foundry
- SMIC
- Hua Hong

4 SOUTH KOREA

IDMs
- Samsung — Also Foundry
- SK Hynix

OSAT
- Hana Micron

5 TAIWAN

Fabless Semi
- MediaTek
- Novatek
- Realtek
- Himax

IP / EDA
- Andes

Foundry
- UMC
- PSMC
- VIS

Design Houses
- GUC
- Alchip
- Faraday

All three also provide IP

OSAT
- ASE (SPIL)
- PTI
- ChipMOS

6 JAPAN

IDMs
- Renesas — Includes Creative Chips

Fabless Semi
- Socionext

8 SINGAPORE

OSAT
- UTAC Group

2027 AI Trends



Distillation



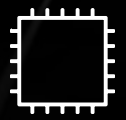
Wearables



Specialty Silicon



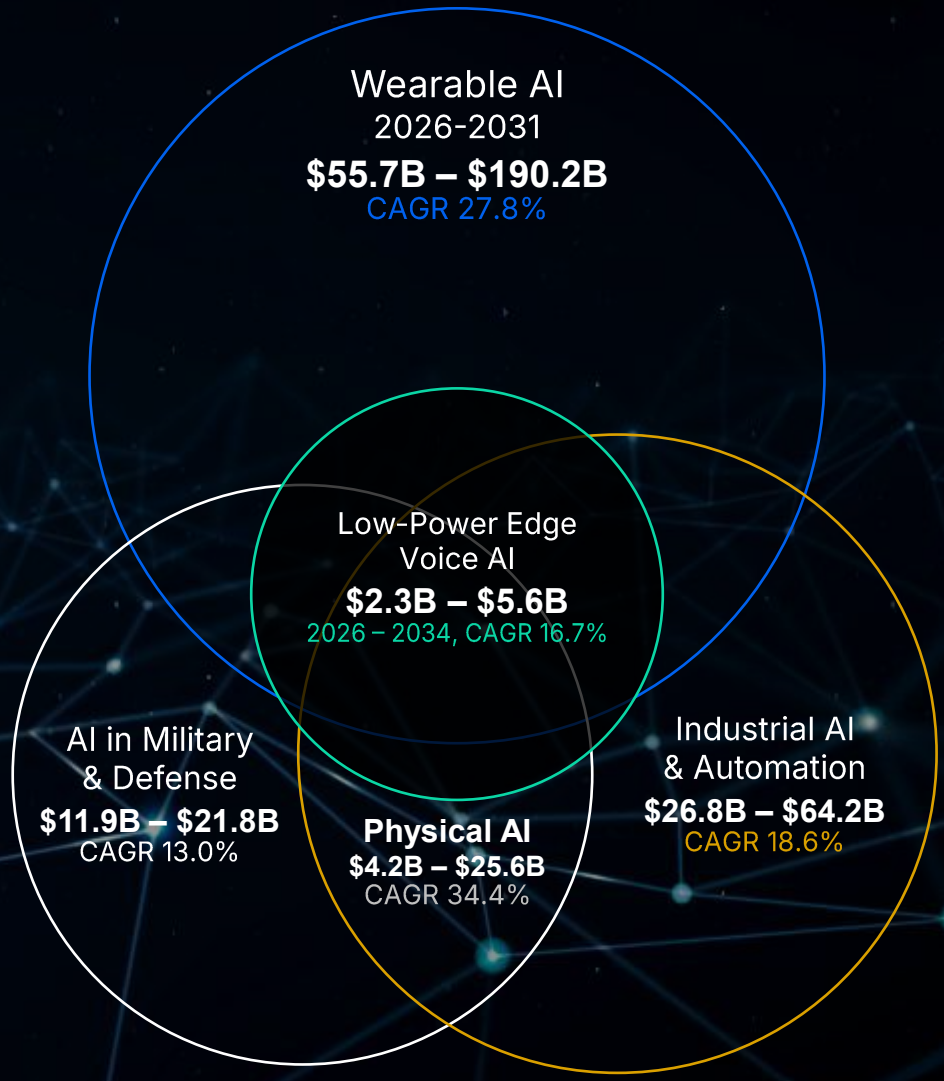
GenAI



System on Modules (SoM)

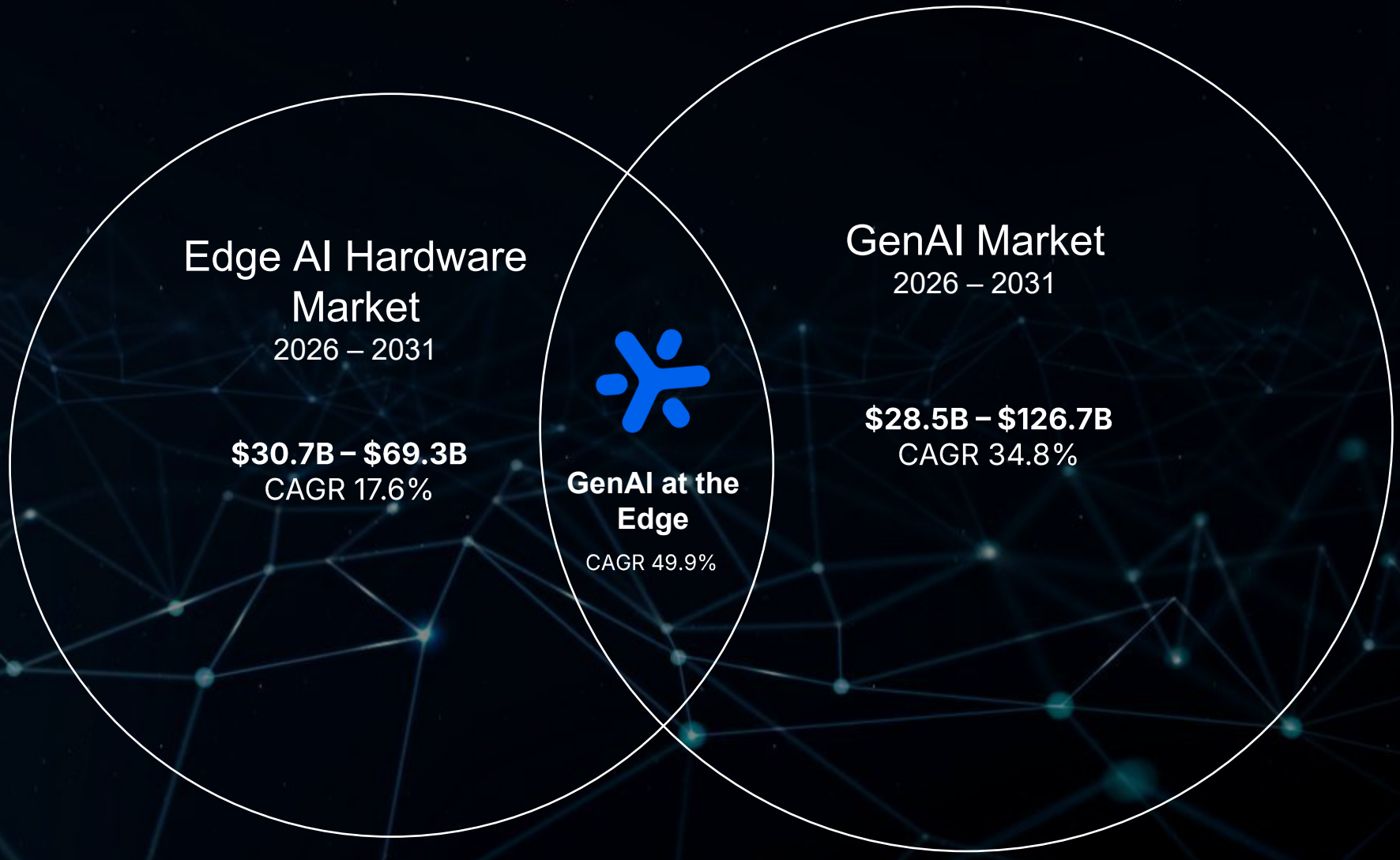


Physical AI



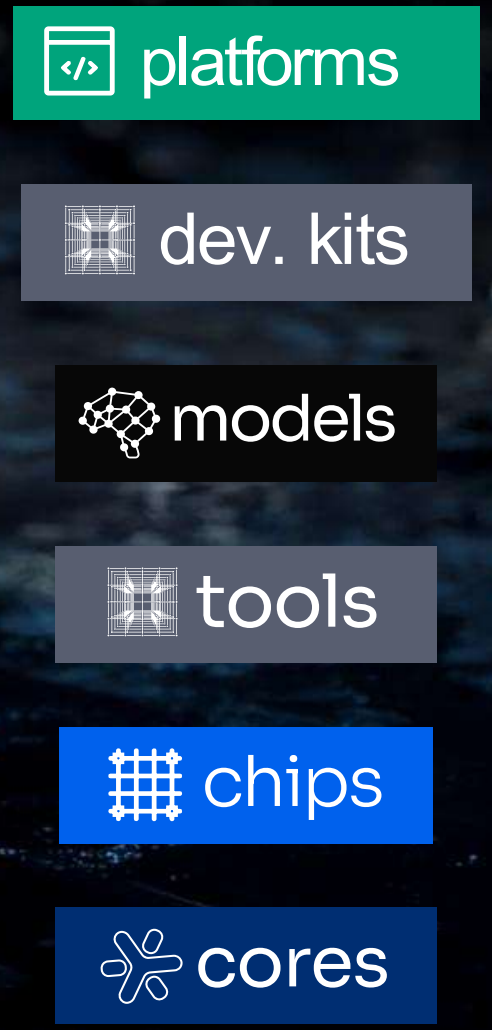
Sources: Grand View Research (Wearable AI, AI in Military, AI in Industrial Automation); Intel Market Research (Low Power AI Voice Processor Chip); Acumen Research & Consulting (Physical AI).

New Market Developing in Edge LLMs



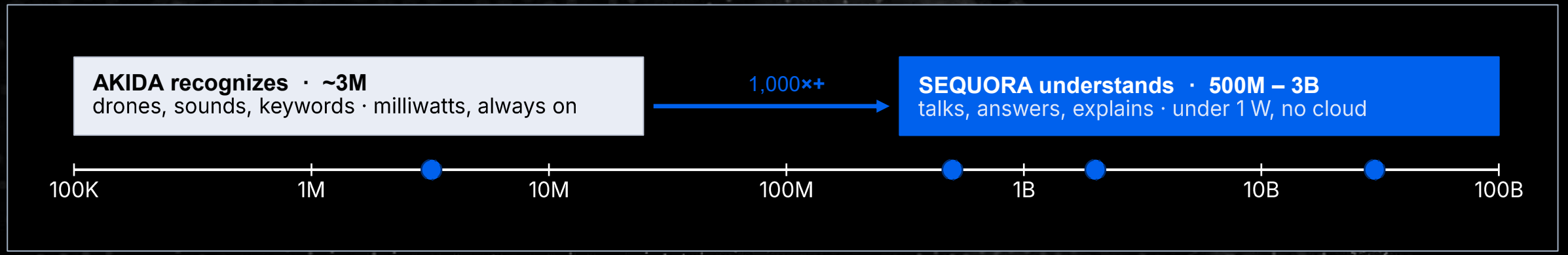
Mordor Intelligence, LLM Market (Sep 2026); MarketsandMarkets (Edge AI Hardware); Grand View Research (Neuromorphic)

Scalable Solutions - IP to Reference Platforms



sequora™

Akida Recognizes… Sequora Understands and Answers.



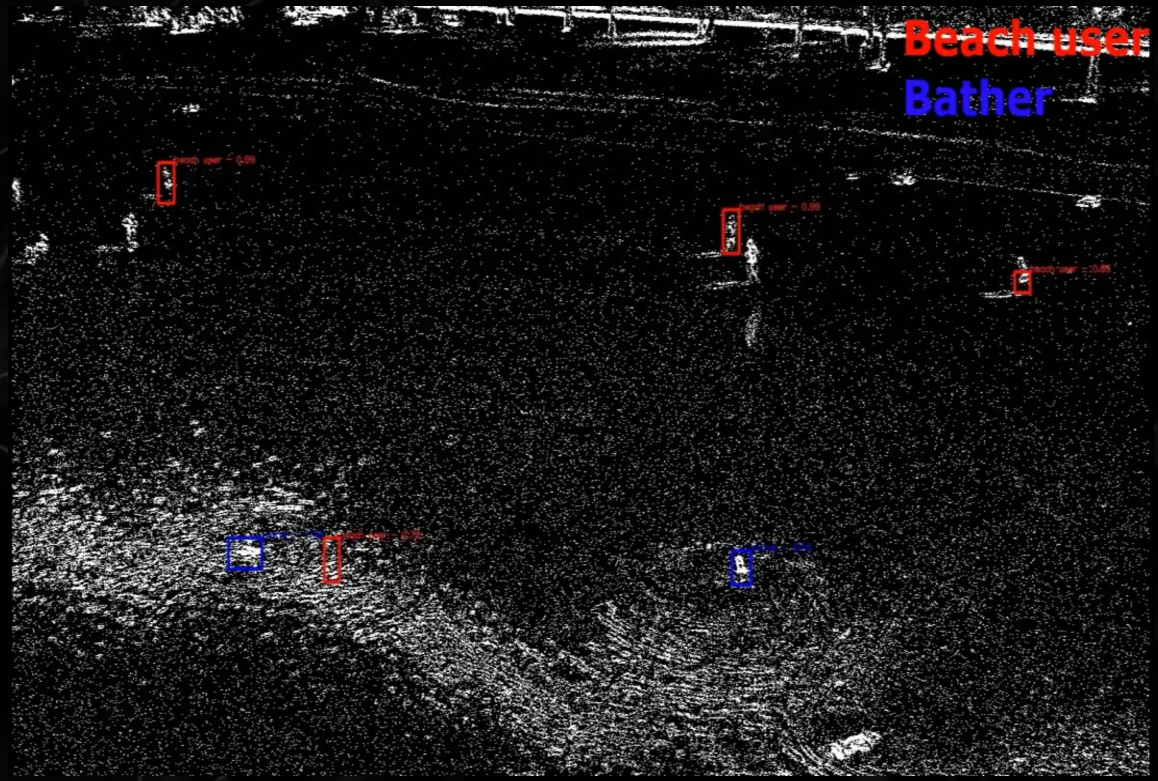
Event-Based Vision for Drone Safety Detection

Customer Challenges

- Lifeguards can't watch large stretches of beach and open water at once
- Traditional frame-based vision cameras on drones cost power, compute and memory

BrainChip Solution

- Arquimea has deployed Akida with a Prophesee event-based camera on a drone to spot distressed swimmers
- Faster detection and tracking at lower power and cost



ARQUIMEA + PROPHESEE METAVISION FOR MACHINES

Detecting swimmers in distress

Customer Challenges

- Remote sites often lack the power, connectivity and light for continuous inspection, leading to unplanned failures and costly downtime

BrainChip Solution

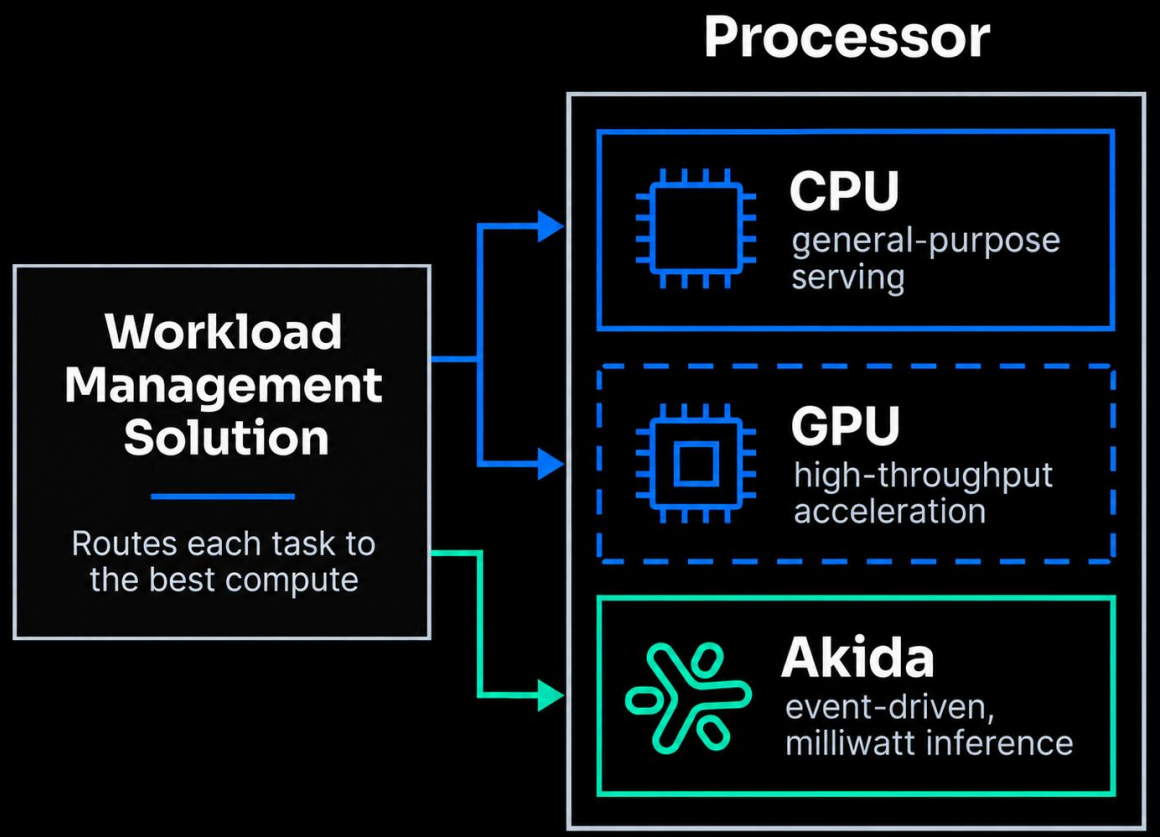
- Paired with an event-based camera, Akida enables low-light visual inspection, flagging faults on-device before failure



Akida remote fault monitoring and inspection

Akida Powers Heterogeneous Computing

- Hybrid computing is about balancing workloads across Akida, CPU and GPU to significantly improve computational efficiency and inference latency
- BrainChip released the IBM Spectrum Symphony Community Akida bundle on GitHub
- The orchestration level can distribute work to our chip.



Always-On Tire Monitoring at the Wheel

Customer Challenges

- Wheel-mounted sensors run on tiny power budgets, leaving little room for AI
- Preprocessing and a host processor add power, cost, and size to the wheel

BrainChip Solution

- Akida classifies tire pressure and vehicle load from accelerometer data in one pass
- Microwatt-range inference, with less preprocessing and host processing



Akida tire pressure and load monitoring

Edge AI Leadership



Leader in Edge AI Technology
Providing IP, Silicon, Software
and Solutions



Strong Industry Trends
Maturing the
Edge AI Market



Strategic Traction
in Key Verticals
Defense, Wearables, Space and
Others

brainchip

Thank you

