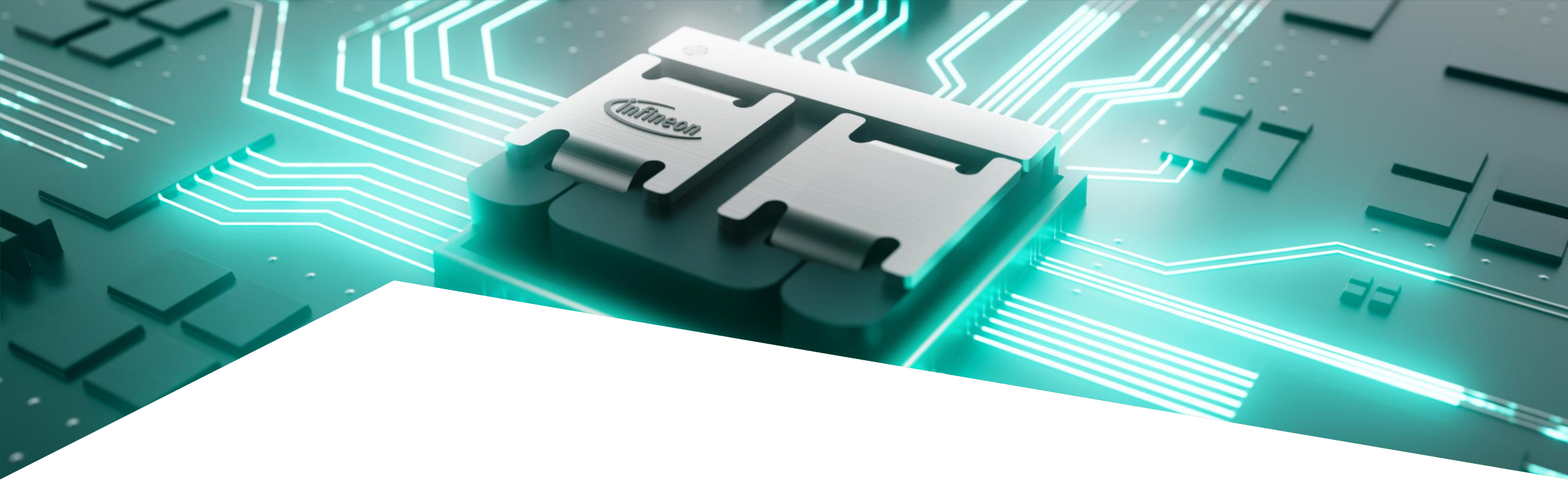




Smart Power Fab Opening

Alexander Gorski | Chief Operations Officer

01 July 2026



Hybrid manufacturing strategy balances inhouse manufacturing and outsourcing to strategic partners – sweet spot for Infineon

Strategic differentiation through right mix of inhouse manufacturing ...

We manufacture **differentiating power & analog mixed-signal** primarily **inhouse**

This results in a **differentiation potential** – technology, manufacturing processes, cost



... and outsourcing to strategic manufacturing partners



Differentiation arises not from technology, but mainly from **product design** and **software**



Capital efficient growth, flexibility and reduced risks



Strategic localization

	IFX revenue split	Foundry supply globally	IFX outsourcing share
Control & connectivity	~35%	High	High
Analog & sensors	~30%	Medium	Medium
Power	~35%	Low	Low

Our inhouse manufacturing footprint is shaped towards resilience and scale, enabling cost competitiveness



14 manufacturing sites

In Americas, Europe, Greater China and Asia

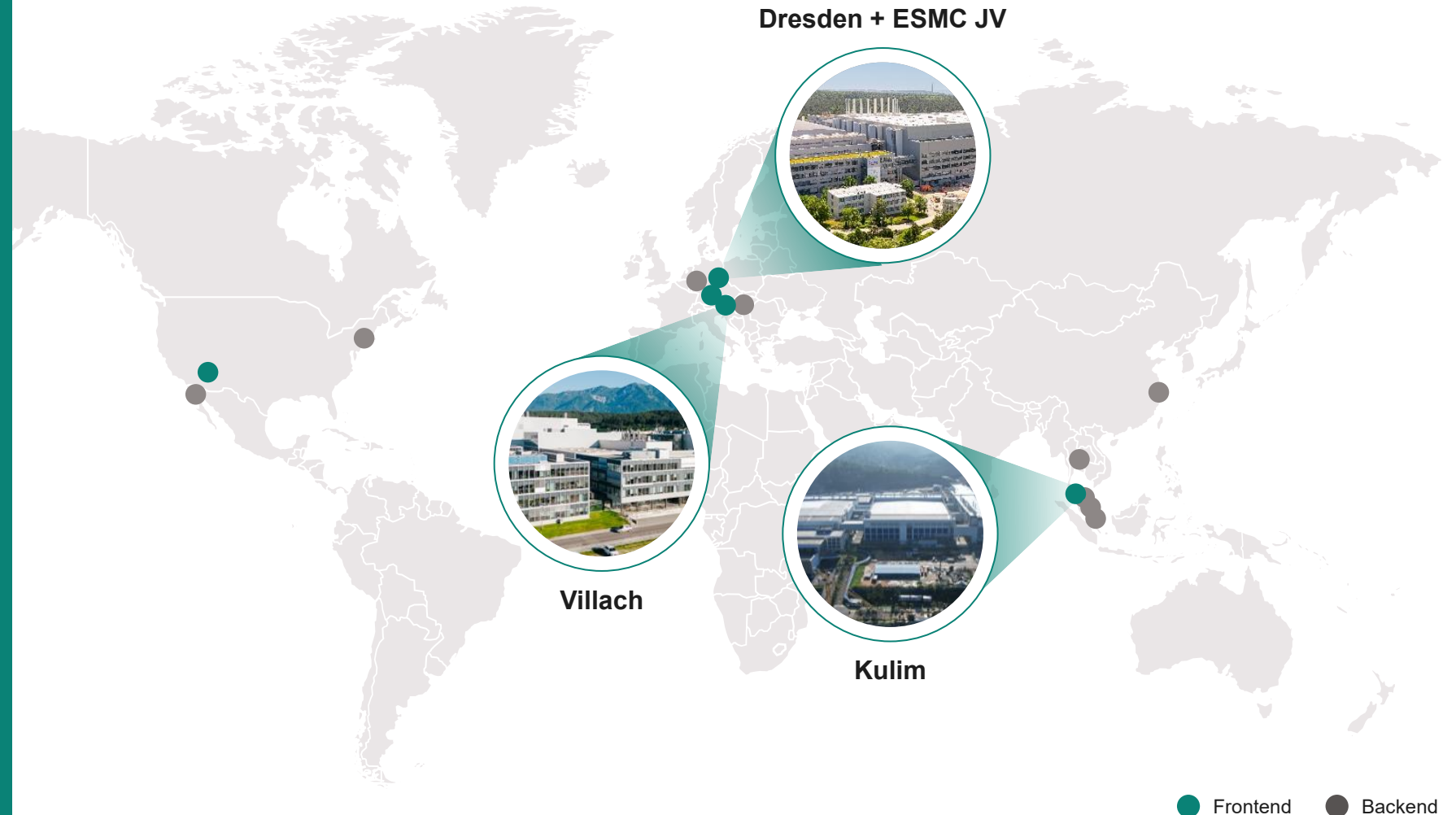
Majority in 300 mm wafer diameter

Further growing

Highly efficient Wide-Bandgap capacity

In best cost location (Kulim)
+ accelerated 200 mm conversion

Scaling in existing clean room space

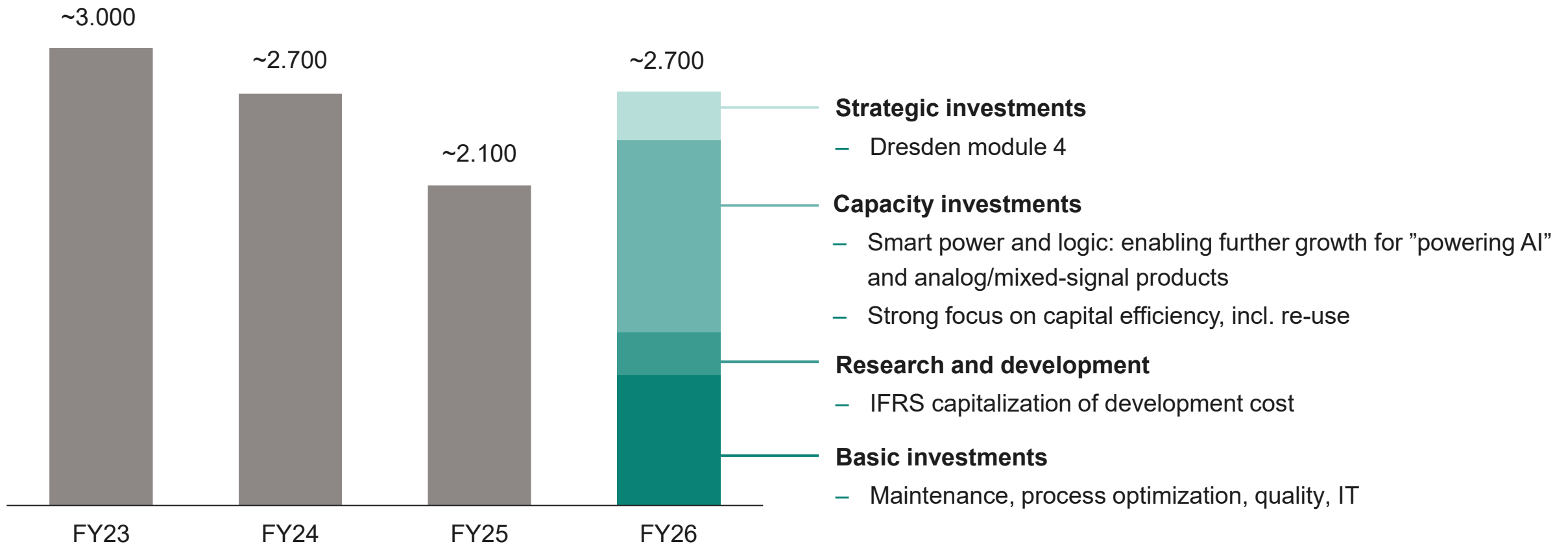


Infineon has consistently invested in highly differentiating capacity, enabling further growth and scalability to its customers



Infineon investments¹ FY23-26

[EUR m]

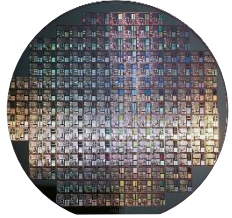


¹ Investments are defined as the total amount invested in property, plant and equipment and in other intangible assets, including capitalized development costs

We are the leader across all power technologies and materials with an unparalleled portfolio and know-how



Si

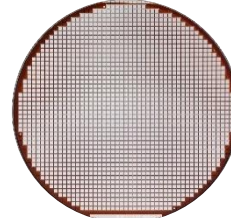


World's thinnest silicon power wafer with 20µm on 300 mm

- Enabling power loss reductions of > 15 percent
- Broadest Si-power portfolio
- Unmatched quality, leading in all figures of merit (FOM)
- Best price/performance ratio



SiC



World's most competitive 200 mm silicon carbide power fab

- Broadest SiC portfolio covering auto and industrial applications
- Leading trench technology
- High reliability and robustness in extreme conditions
- Smaller system size



GaN



World's first 300 mm gallium nitride power wafer

- Enabling cost parity with silicon
- Highest efficiency at the highest frequency enabling smallest system size
- Allow functional integration

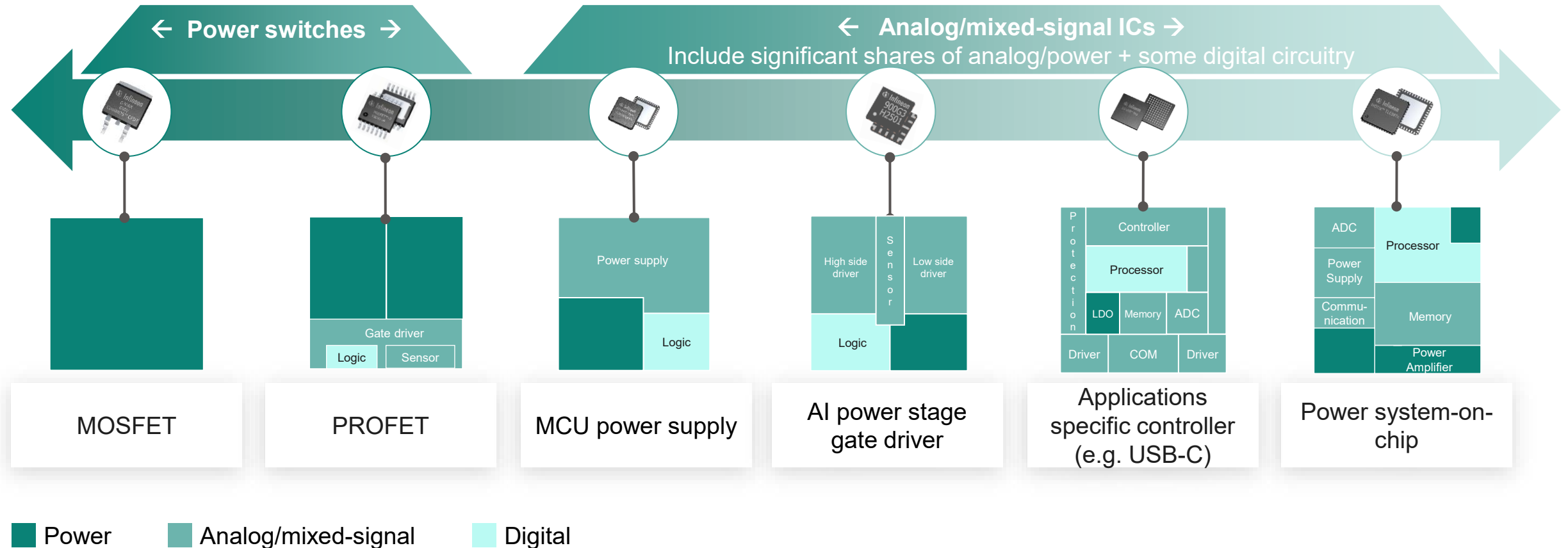


The Smart Power Fab – largest fab for intelligent power semiconductors worldwide

- **Largest fab** for intelligent power semiconductors worldwide and one of the **most advanced and flexible** 300 mm semiconductor manufacturing facilities
- **Creation of ~1,000 jobs**, supported by expanded vocational training, plus strong impact on the ecosystem
- Significantly **higher ramp speed** possible, supported by AI-optimized pre-planning and digital twin
- **At its core: semiconductors driving decarbonization and digitalization** – for automotive and industrial applications, including AI data centers
- **The combination of power semiconductors with analog/mixed-signal components** enables highly energy-efficient, intelligent system solutions



Our Smart Power Fab will serve a highly differentiating power & analog/mixed-signal product portfolio with high flexibility



The efficient & flexible product portfolio is a strategic advantage of the fab – e.g. enabling Powering AI growth

The Smart Power Fab sets new standards for sustainability



Water management

- Industrial water instead of drinking water for operations
- Water recycling rate to up to 45% by 2033
- 90% of the used water will be returned to the Elbe River in same high quality



Climate tech

- For energy and resource efficiency using artificial intelligence



100% renewable energy

- Smart Power Fab is powered 85% by green electricity and 15% by district heating
- Fab operates entirely without natural gas
- Up to 45% of our energy recovery



LEED certification

- Aiming for the Leadership in Energy and Environmental Design (LEED) certificate as Infineon's first production facility
- Supports Infineon's overarching goal of being CO2-neutral by 2030

The Smart Power Fab ramps production at exactly the right time to serve powering AI growth – ahead of construction schedule



Summer 2023
Building permit

Autumn 2023
Shell construction

Spring 2025
Facility equipment

Summer 2026
Ramp-up



