

Figure 2: Competitive Supply Chain Landscape

SEGMENT	CHINA TODAY	CHINA IN 5 YEARS	CHINA IN 10 YEARS	UNITED STATES TODAY
Design				
Circuit creation and design verification tools	Light Blue	Light Blue	Light Blue	Dark Blue
Intellectual property	Medium Blue	Medium Blue	Dark Blue	Dark Blue
Fabless chip design	Medium Blue	Dark Blue	Dark Blue	Dark Blue
Systems integration	Medium Blue	Dark Blue	Dark Blue	Dark Blue
Key Inputs				
Specialized chemicals and materials	Light Blue	Medium Blue	Medium Blue	Medium Blue
Processing equipment	Light Blue	Medium Blue	Medium Blue	Dark Blue
Manufacturing				
DRAM memory	Medium Blue	Medium Blue	Medium Blue	Dark Blue
NAND flash memory	Medium Blue	Medium Blue	Dark Blue	Medium Blue
Mature logic ($\geq 7\text{nm}$)	Medium Blue	Dark Blue	Dark Blue	Dark Blue
Leading-edge logic ($< 7\text{nm}$)	Light Blue	Medium Blue	Medium Blue	Medium Blue
Packaging	Dark Blue	Dark Blue	Dark Blue	Light Blue
Assembly	Dark Blue	Dark Blue	Dark Blue	Light Blue

Comparison to State-of-the-Art



Far Behind Progressing Near Parity Parity or Leading