

Volume Scaling of Silicon Photonics

CM Perspective

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JABIL



Built on a Solid Foundation

1966

FOUNDED IN
MICHIGAN, USA



TENURED
MANAGEMENT TEAM

100+

SITES STRATEGICALLY LOCATED
AROUND THE WORLD

TOP TIER

MANUFACTURING
SERVICES PROVIDER

250K+

DEDICATED
EMPLOYEES

50M+

SQUARE FEET OF
MANUFACTURING SPACE

JABIL

\$34.7B

REVENUE
IN FY23

400+

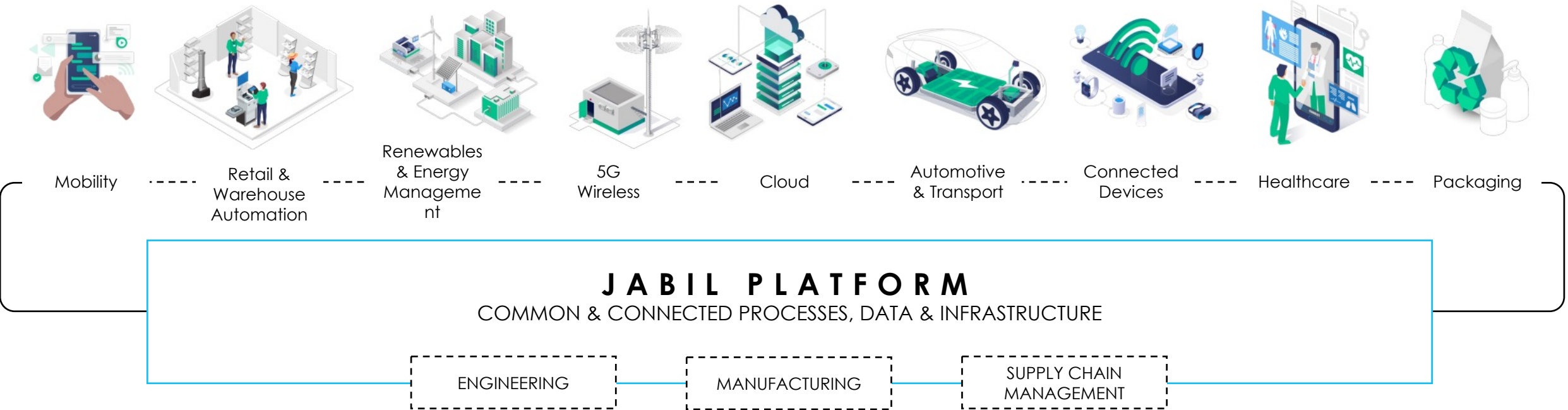
CUSTOMERS ACROSS
DIVERSE MARKETS

27K+

SUPPLY CHAIN
PARTNERS

Our Solutions

Enabled by Structure, Investments, Customers



Jabil Cloud Market Inputs

Full lifecycle solutions for cloud data centers



TAILOR

White-box hardware delivered via a customer-centric supply chain



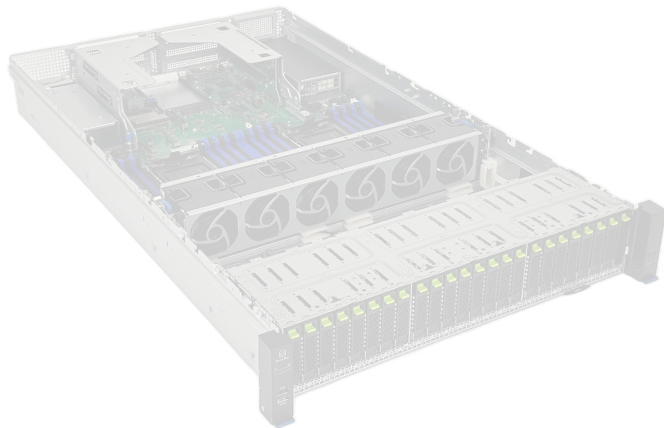
INTEGRATE

Factory integrated to accelerate time-to-deployment



RETIRE

Security & IP conscious, environmentally responsible retired asset management



Jabil clients requesting:

- 1) Design services for white-box servers
- 2) Verticalization, simplified supply chain
- 3) Accelerated technology adoption

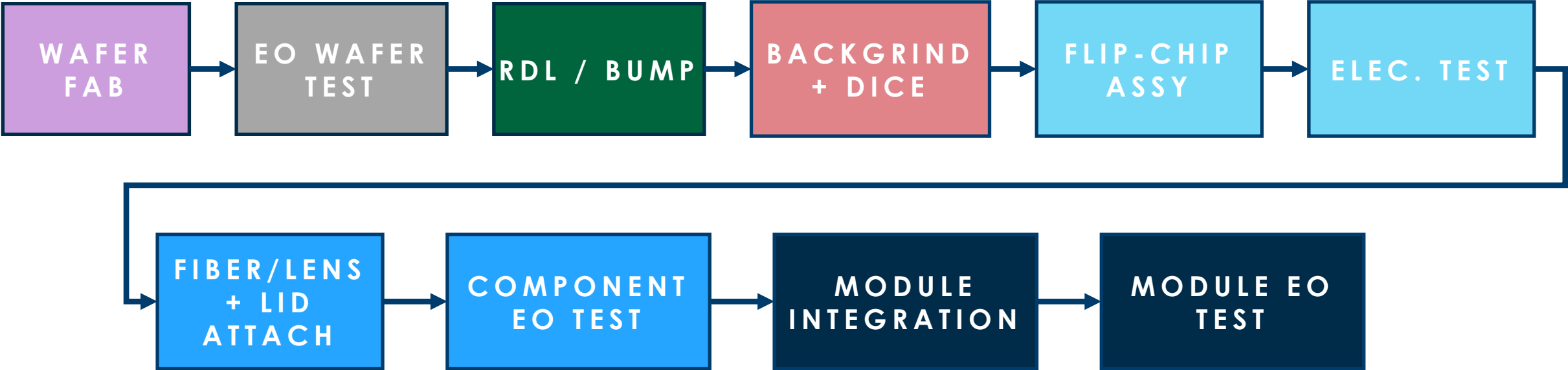


Silicon Photonics

Silicon Photonics Mfg Ecosystem

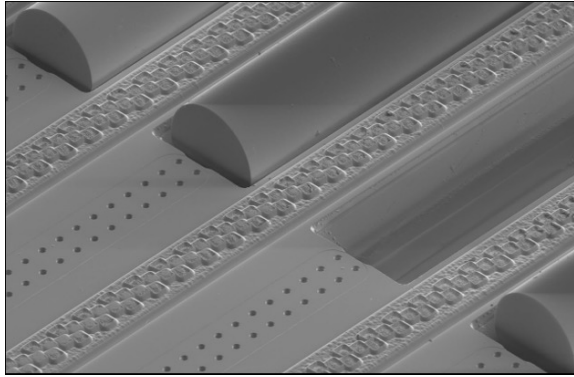
Example high-level pluggable production flow.

Each color denotes potentially different supplier.

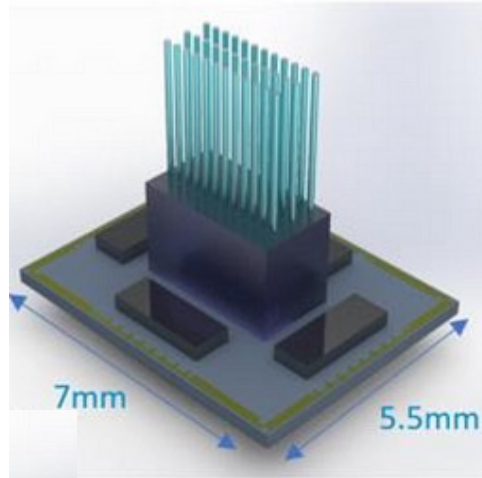


Multi-hop supply chain is a problem

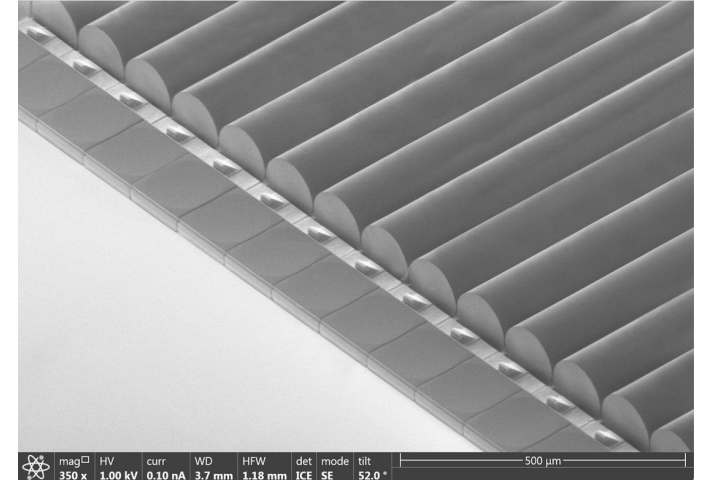
SiPh Optical I/O Solutions



V-groove (Global Foundries)



Vertical Coupling
(Nubis Communications)



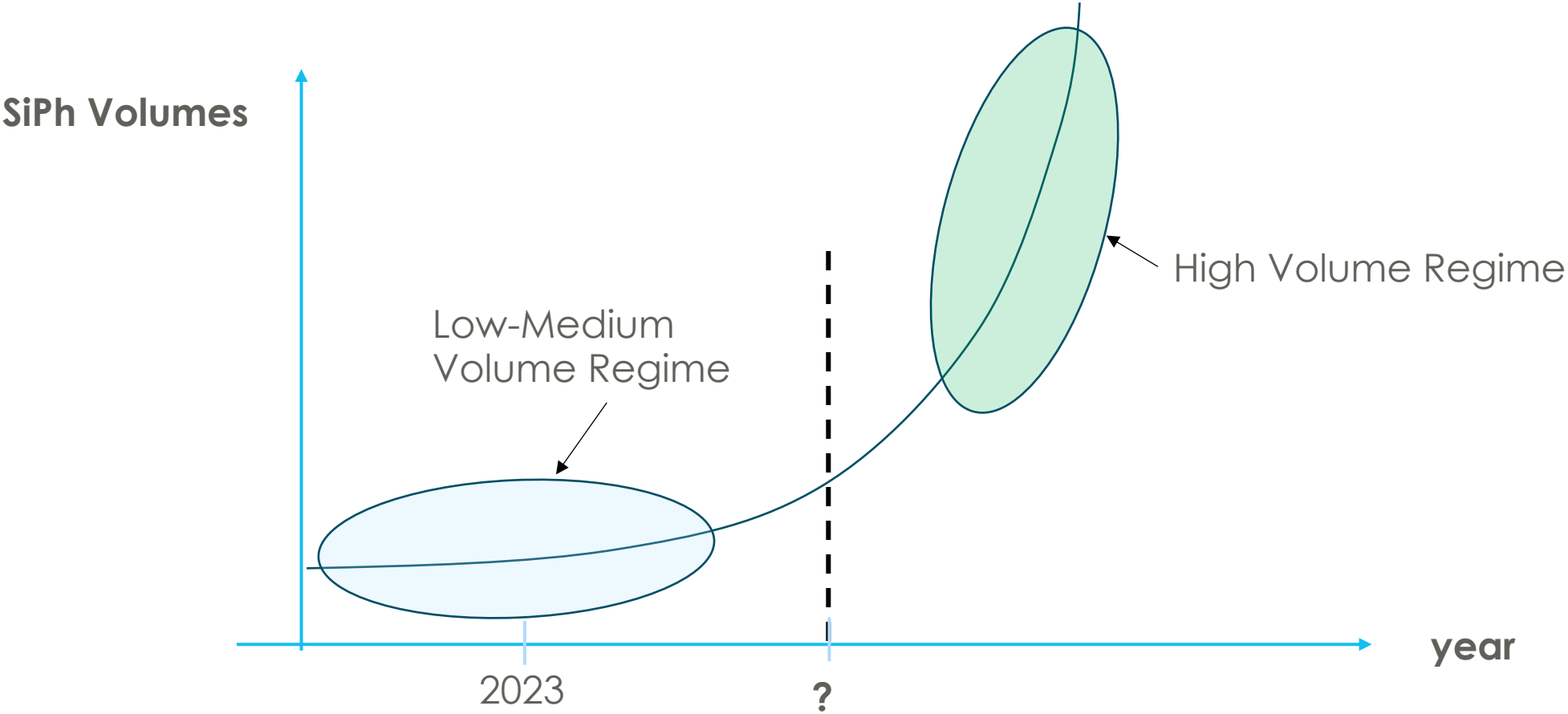
Detachable Connectors
(Teramount)

Plurality of optical I/O schemes make it difficult to invest in capital ahead of volume orders.

No one-size-fits-all fiber-attach machine.

Optical I/O method heavily impacts assembly process and electrical I/O configurations.

Demand Growth

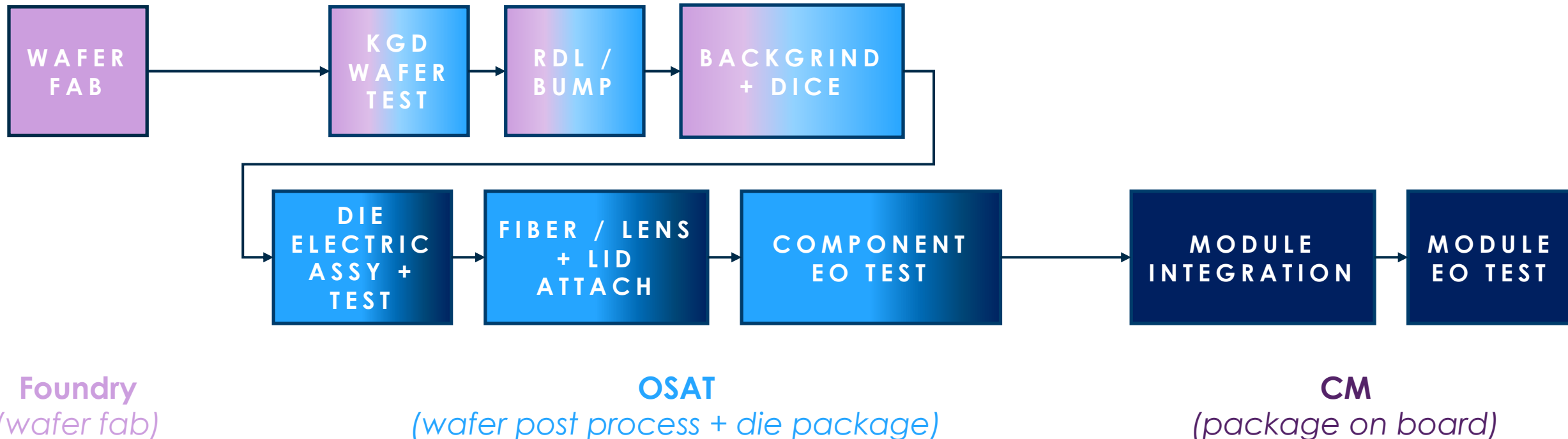


Cross-over to higher volumes inhibited by lack of mfg eco-system support

Blurring of Traditional Lines in Ecosystem

Blurring of traditional separation:

- Foundry ↔ OSAT: custom needs of SiPh require further handholding by foundry
- OSAT ↔ CM: fiber handling, assembly flow sequence, current volumes



Path Forward - Partnerships?

THANK YOU



JABIL