

CAPITAL MARKETS DAY 2020

INSIGHTS COATER/DEVELOPER

September 24, 2020

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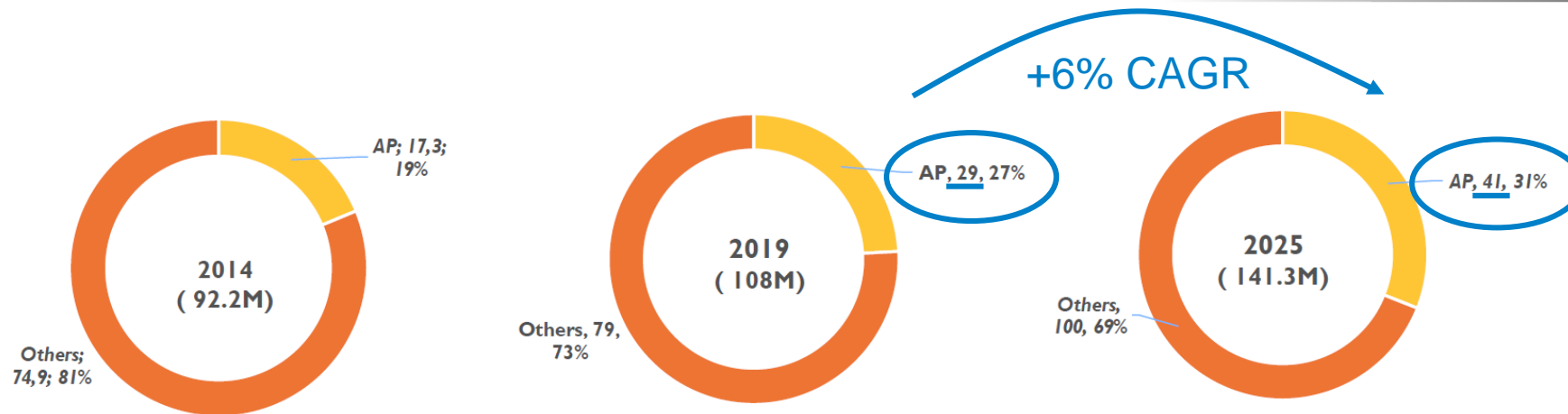


ADVANCED PACKAGING MARKET GROWTH

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ADVANCED PACKAGING OVERVIEW 2014 to 2025

Wafer Split (300mm eq WSPY)



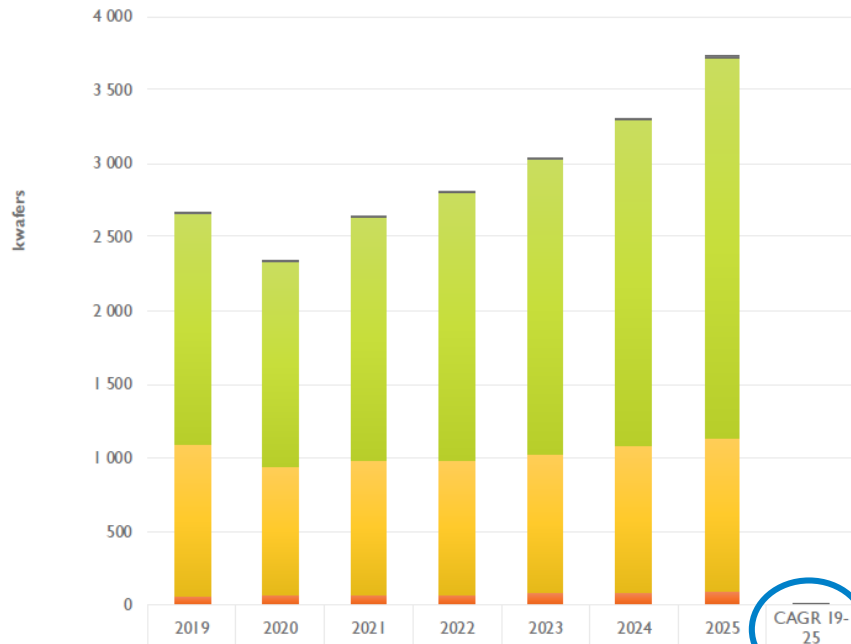
In terms of 300mm eq wafers, traditional packaging still dominates with almost 75% of the total market. However, Advanced Packaging is continuously increasing its share of wafers and its market share increases from ~27% in 2019 to 31% in 2025.

MEMS MARKET GROWTH

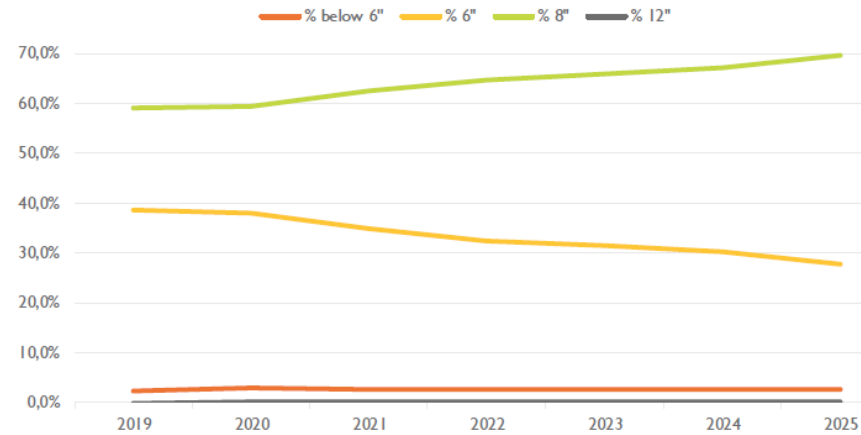
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MEMS WAFER STARTS PER YEAR

2019-2025 MEMS wafer forecasts (kunits)



MEMS wafer size relative evolution

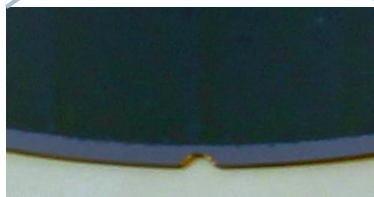
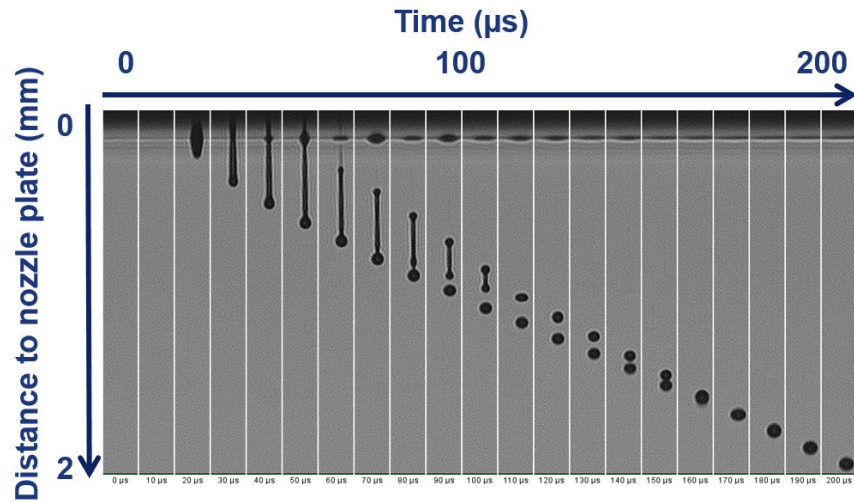


MEMS has taken the first baby steps in 12" manufacturing

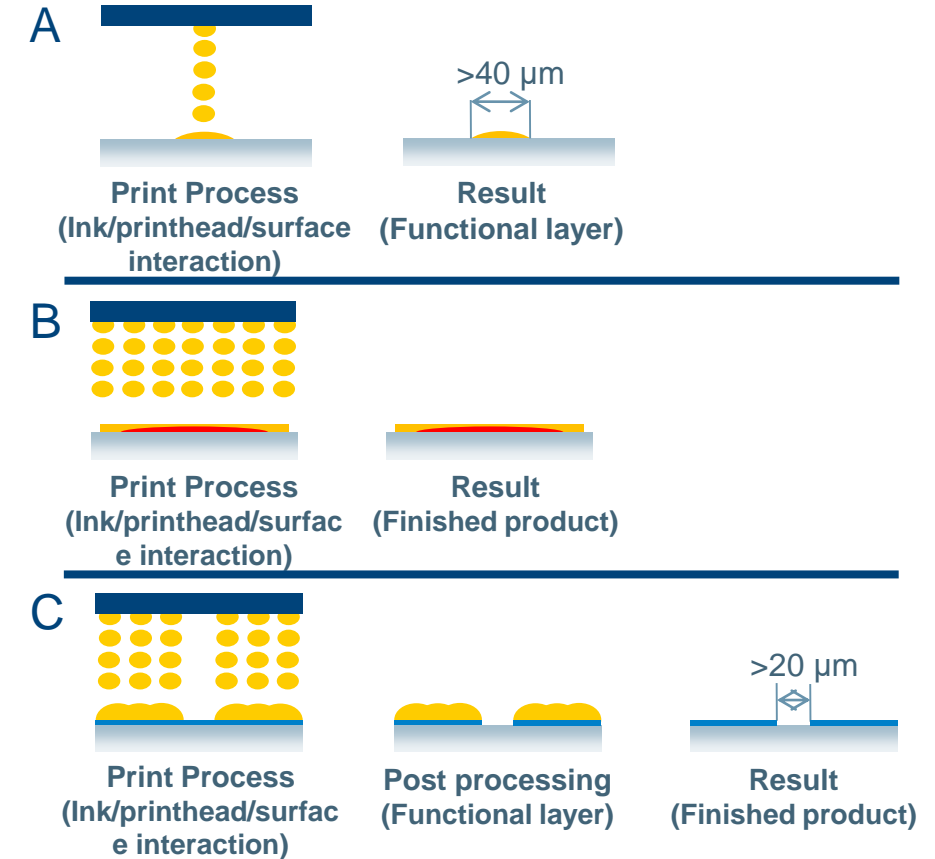
There will be more and more 8" wafers in the years to come, slowly replacing 6" platforms

INKJET COATING POTENTIAL

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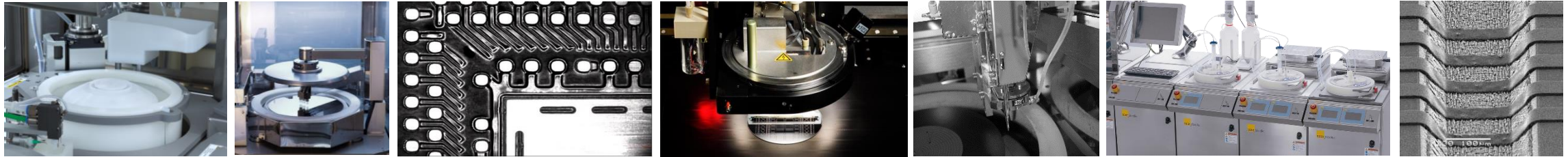


- + Significantly reduced material consumption (conventional spin coating often spins off $\gg 50\%$ of material; Inkjet uses almost 100% of material)
- + Material cost can be several factors higher than depreciation cost of machine (per wafer)
- Major total cost of ownership advantage for Inkjet coating systems



PRODUCT MARGIN DEVELOPMENT

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Coat/Develop

Inkjet

Spraycoat

Coat/Develop



ACS200 Gen3



ACS300 Gen2/3



JETx



LP50



AS8
AS12



Labspin, RCD8,
Labcluster



AD12
SD12

Comment / USP

High installed base, high flexibility on configuration also with customer specials. Tailored to mid- backend processes.

Unique combination: within SUSS semiconductor and inkjet expertise and installed base under the same roof. Due to door opener LP50, path from R&D to production available.

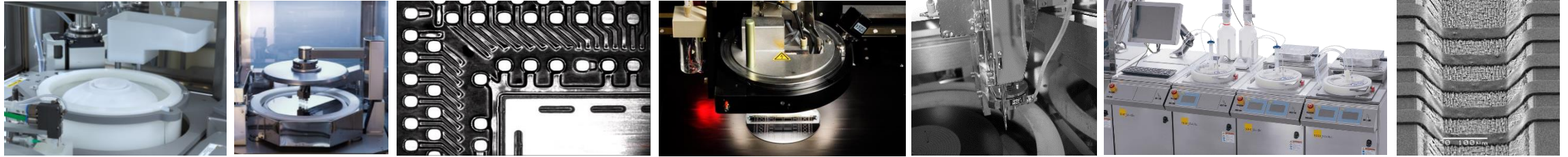
Specialized process for high topographies.

Various processes available. Most tools/modules based on automatic version. High reliability and process performance.

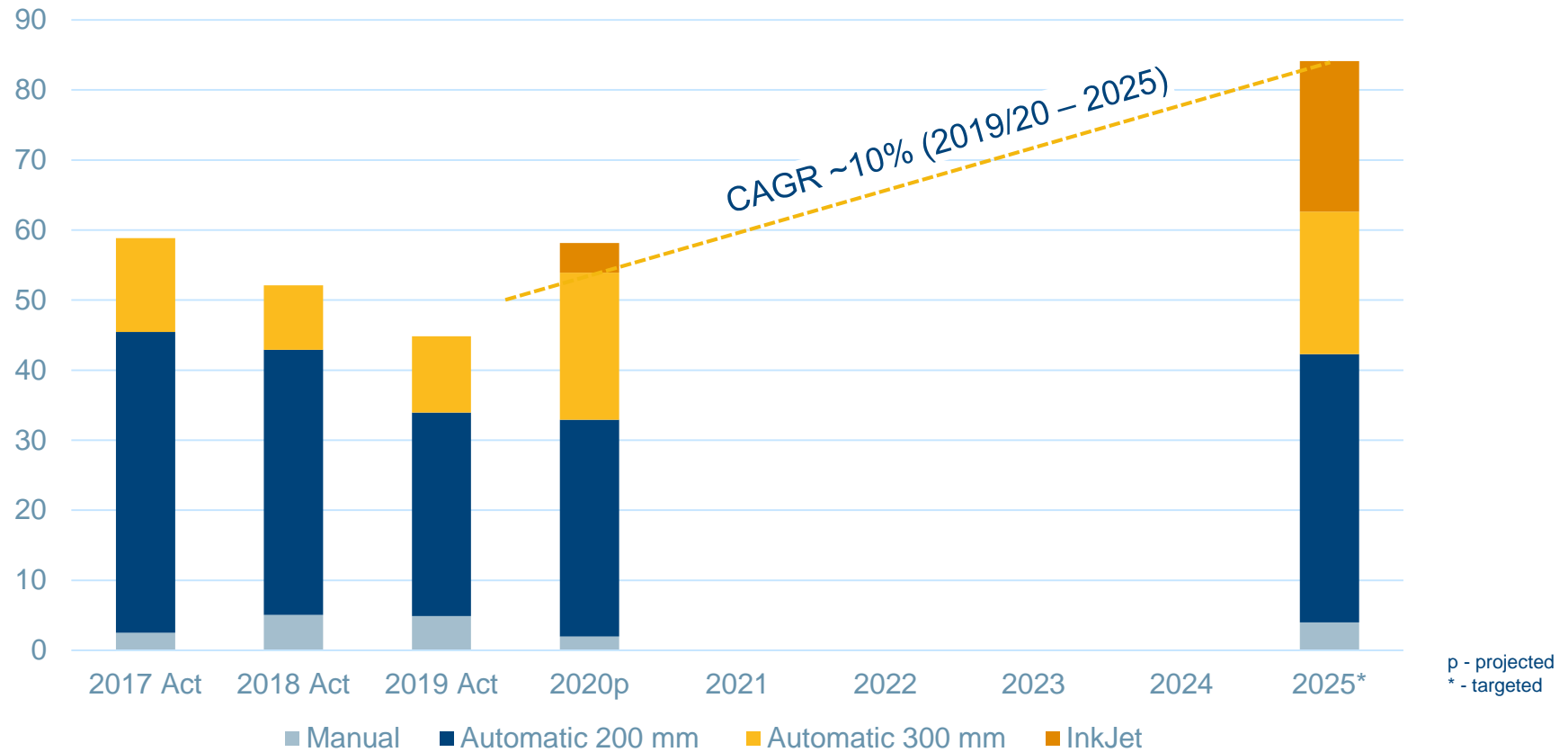
SUMMARY GROWTH POTENTIAL

- ON TRACK WITH SUSS STRATEGY 2025 PROJECTION

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Forecast Sales Revenue Coater €M – most likely scenario



Thank you!