

CAPITAL MARKETS DAY 2020

INSIGHTS COATER/DEVELOPER

September 24, 2020

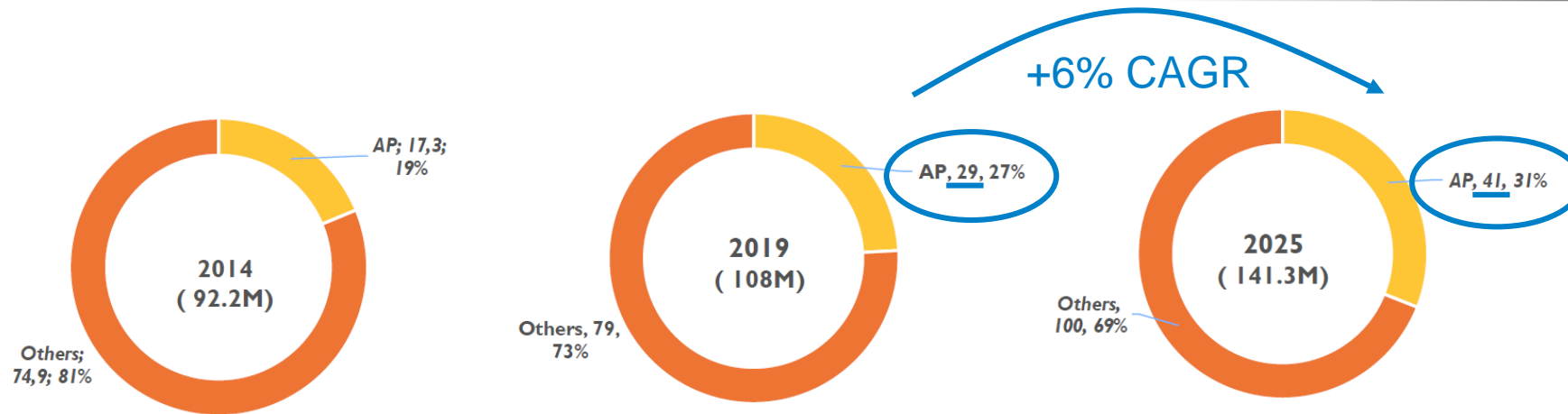
Dr.-Ing. Thomas Grund, Business Unit Manager Coater/Developer



ADVANCED PACKAGING MARKET GROWTH

ADVANCED PACKAGING OVERVIEW 2014 to 2025

Wafer Split (300mm eq WSPY)



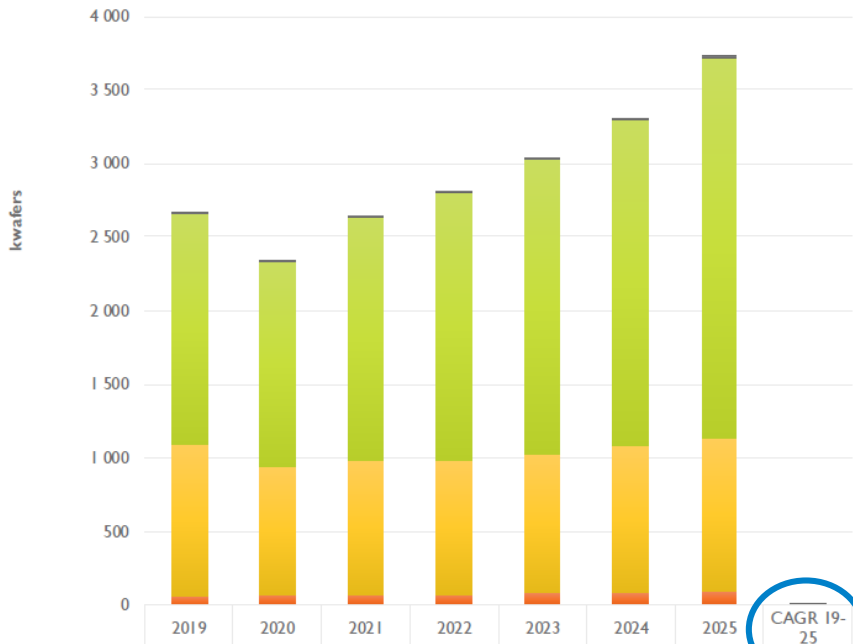
In terms of 300mm eq wafers, traditional packaging still dominates with almost 75% of the total market. However, Advanced Packaging is continuously increasing its share of wafers and its market share increases from ~27% in 2019 to 31% in 2025.

MEMS MARKET GROWTH

MEMS WAFER STARTS PER YEAR

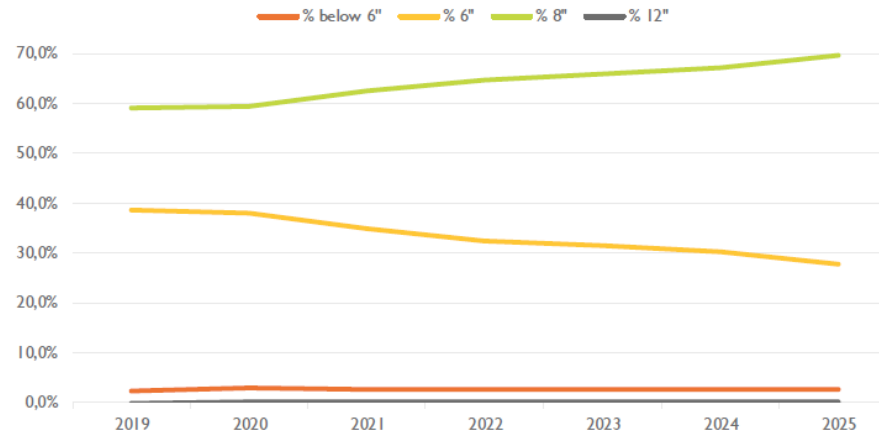
Executive Summary

2019-2025 MEMS wafer forecasts (kunits)



	2019	2020	2021	2022	2023	2024	2025	CAGR 19-25
TOTAL	2 653	2 328	2 634	2 804	3 033	3 302	3 726	5,8%
■ TOTAL 12" Si	0,6	0,6	0,7	1,6	2,2	2,8	3,4	35,5%
■ TOTAL 8" Si	1 566	1 381	1 644	1 817	1 999	2 217	2 593	8,8%
■ TOTAL 6" Si	1 027	881	920	911	952	997	1 038	0,2%
■ TOTAL BELOW 6" Si	61	65	69	74	80	85	91	7,0%

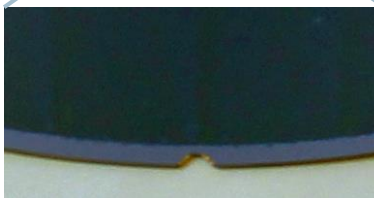
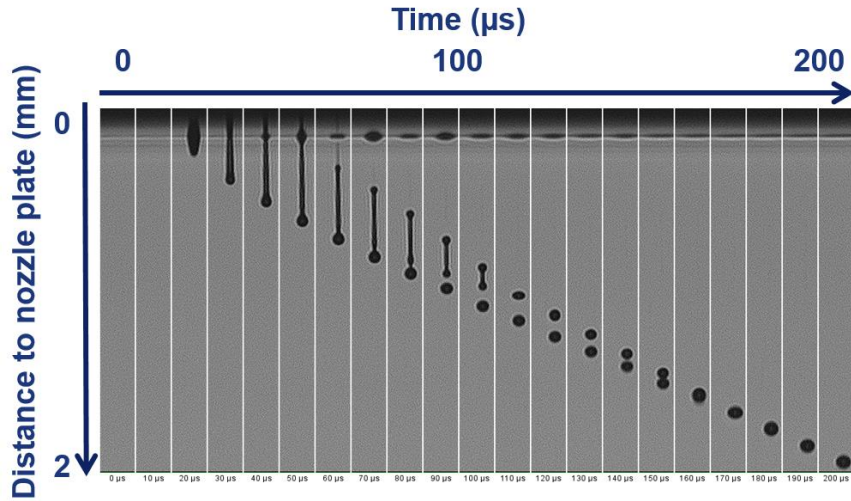
MEMS wafer size relative evolution



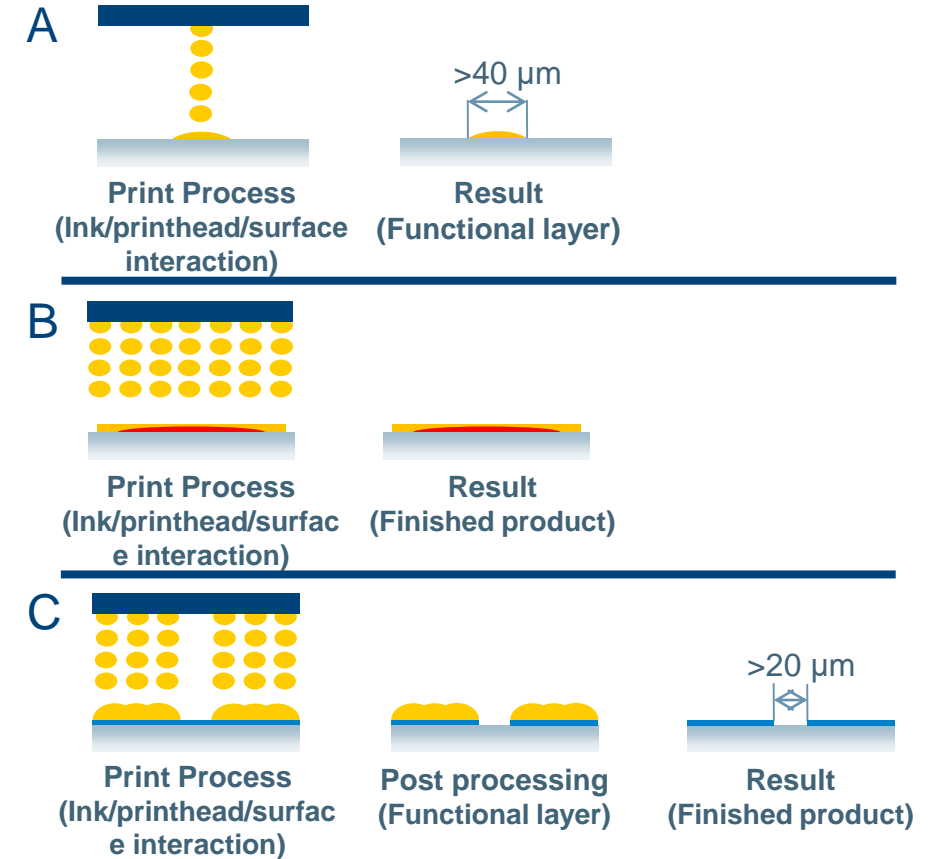
MEMS has taken the first baby steps in 12" manufacturing

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

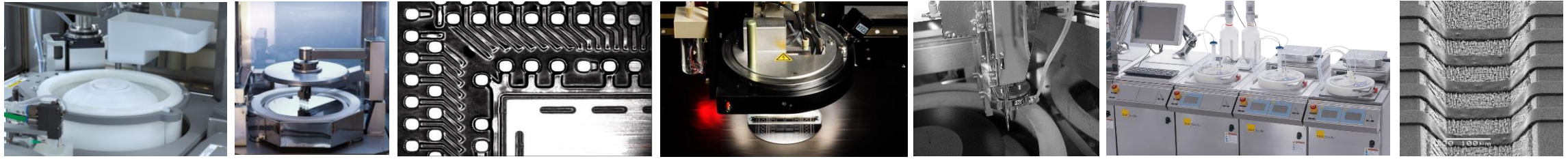
INKJET COATING POTENTIAL







- + Significantly reduced material consumption (conventional spin coating often spins off >>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

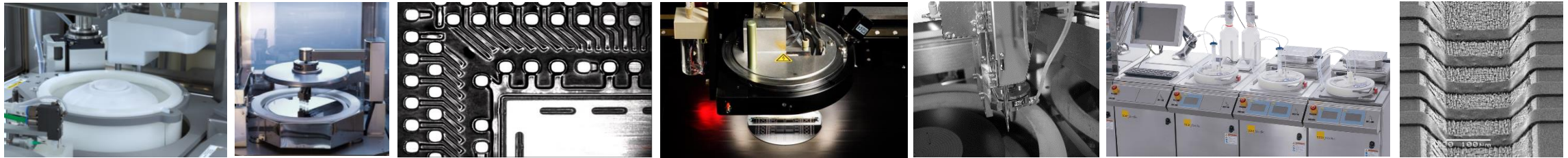


Coat/Develop	Inkjet	Spraycoat	Coat/Develop
--------------	--------	-----------	--------------

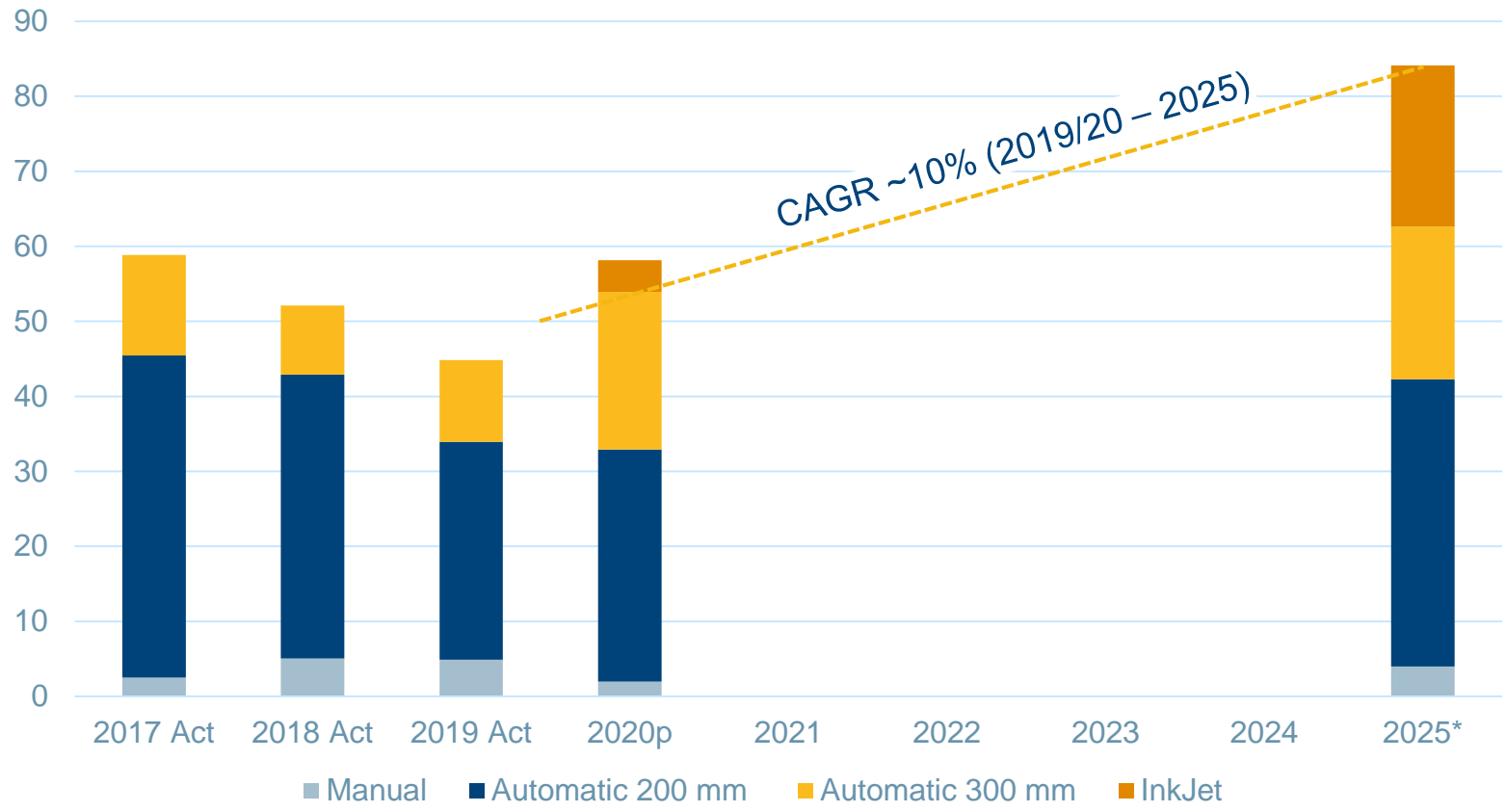
 <p data-bbox="249 963 713 992">ACS200 Gen3 ACS300 Gen2/3</p>	 <p data-bbox="904 963 1350 992">JETx LP50</p>	 <p data-bbox="1617 963 1707 1021">AS8 AS12</p>	 <p data-bbox="1885 963 2369 1021">Labspin, RCD8, Labcluster AD12 SD12</p>
---	---	--	--

<p data-bbox="12 1113 178 1178">Comment / USP</p> <p data-bbox="242 1113 726 1249">High installed base, high flexibility on configuration also with customer specials. Tailored to mid- backend processes.</p>	<p data-bbox="777 1113 1503 1249">Unique combination: within SÜSS semiconductor and inkjet expertise and installed base under the same roof. Due to door opener LP50, path from R&D to production available.</p>	<p data-bbox="1541 1113 1770 1220">Specialized process for high topographies.</p>	<p data-bbox="1809 1113 2458 1220">Various processes available. Most tools/modules based on automatic version. High reliability and process performance.</p>
---	--	---	--

SUMMARY GROWTH POTENTIAL - ON TRACK WITH SUSS STRATEGY 2025 PROJECTION



Forecast Sales Revenue Coater €M – most likely scenario



A close-up photograph of a hand holding a black marker, writing the words "Thank you!" in a cursive script on a white surface. The marker is positioned at the end of the exclamation point.

Thank you!