

# **CAPITAL MARKETS DAY - STERNENFELS**

## **- COATER/DEVELOPER -**

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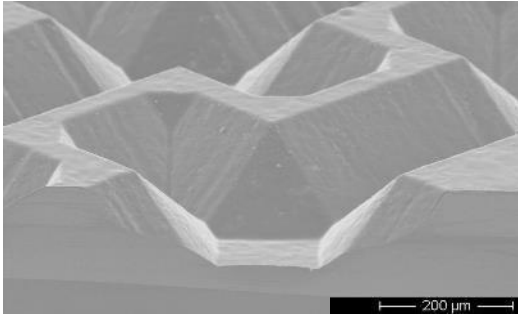
September 13, 2018



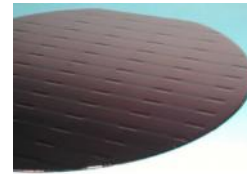
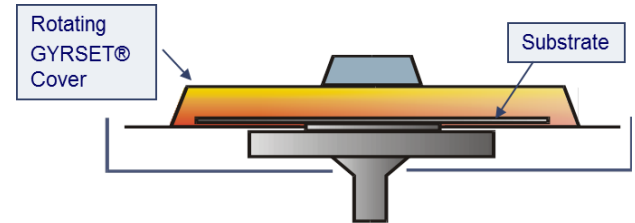
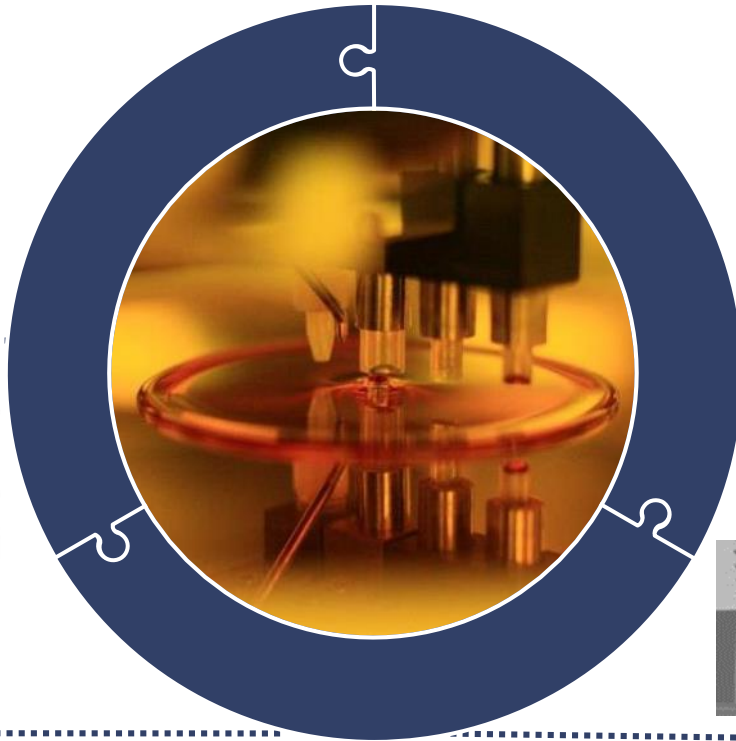
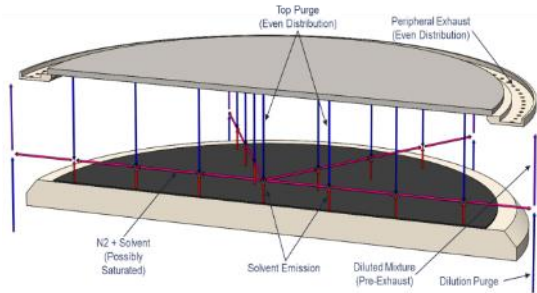


- + Solutions for coat, develop, UV exposure and laser ablation for direct patterning
- + Automated, semi-automated and manual equipment
- + Target markets are Advanced Packaging, MEMS and LED
- + Order entry 2017: € 136.2 million
- + Sales 2017: € 112.8 million
- + EBIT 2017: € 6.3 million

# COATER / DEVELOPER – CORE TECHNOLOGIES



**Spray Coating**  
Conformal Coating  
of Topography



**Spin Coating**  
Open Bowl  
Gyraset Coating



**Baking**  
Priming, Soft Bake,  
PEB, Hard Bake

**Developing**  
Solvent & Aqueous Chemicals  
Spray and/or Puddle Process

**Adv. Packaging** (200 / 300mm wafers) → ~8% **CAGR** for wafer volume (2016-22) <sup>1)</sup>

- + Memory market grew >60%, non-memory ~9% and wafer fab equipment ~18% from 2016-17
- + Next memory market down turn is expected around 2019-20 <sup>2)</sup>
- + Largest growth drivers <sup>1)</sup>
  - FO-WLP (Fan-Out Wafer Level Packaging) with ~31% CAGR (2016-22)
  - 2.5D / 3D integration with ~27% CAGR (2016-22)
- + Main application drivers are mobile, IoT, industrial and automotive <sup>1)</sup>



ACS300Gen2



ACS300Gen3



Microcontroller FO-WLP

Sources:

1) Yole Développement

2) Gartner

# MAIN MARKETS COATERS – MEMS AND RF-MEMS

**MEMS / RF-MEMS** (100 – 200mm wafers) → ~5% CAGR for wafer volume (2016-22) <sup>1)</sup>

- + Represents ~10% of the total IC market
- + Automotive was 1<sup>st</sup> MEMS wave in the 1990s, demand for consumer MEMS (2<sup>nd</sup> wave) dropping since 2012
- + 3<sup>rd</sup> wave driven by AR/VR, autonomous vehicles, 3D sensing and 5G
- + Largest growth driver is RF-MEMS with ~25% CAGR (2016-21)
- + Dominant wafer size is 200mm wafers



ACS200Gen3



Multi-die System in Package with BAW filter, switches, ...

Source:

<sup>1)</sup> Yole Développement

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Thank you!

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