Optical Components for Semiconductor Manufacturing Equipment

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Yoshiyuki Nomura
Corporate Vice President
General Manager, Optical Component Business Unit

Giving Shape to Ideas

Create value to support evolution of the entire value chain by strategically expanding upstream

Enhancing wave optics on top of geometrical optics

FY21-22

- Prioritized as focus area

FY22-25

- Facility investment
- Technology adoption

FY25-

- **Scaling the business**

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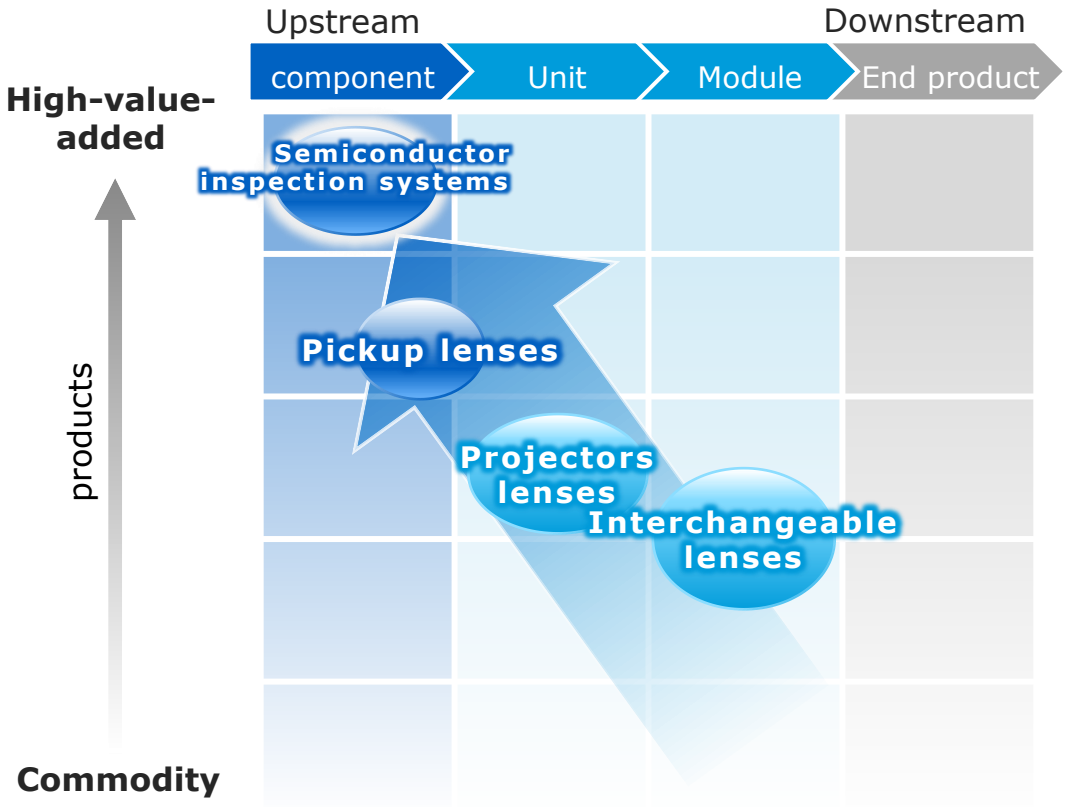
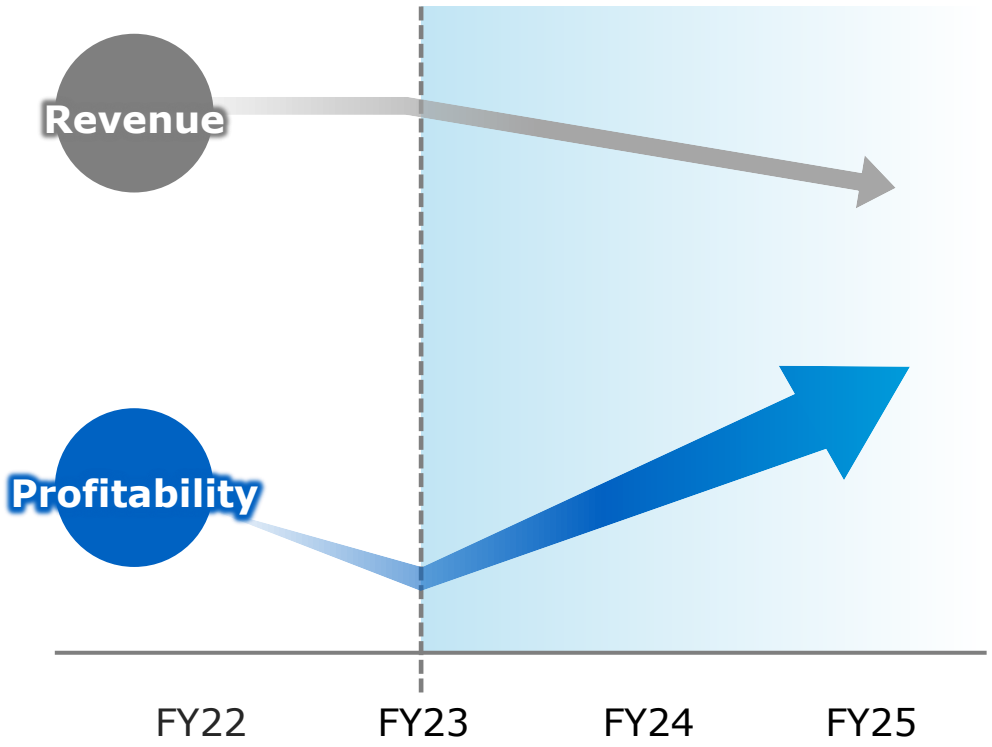
Profitability improvement through:

- Focus on semiconductor inspection system
- Equity transfer in non-industrial applications* partially

Portfolio of Product



Revenue and Profitability Trends



*Optical units for projectors, interchangeable lenses etc.

Proprietary Optical Technologies

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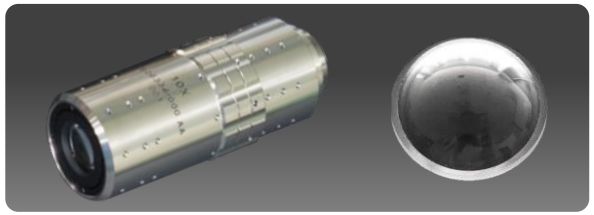
Since the 1900s | 1980s | 1990s | **2010s**

Cameras

Interchangea
ble lenses
for cameras

Pickup lenses
for optical disks

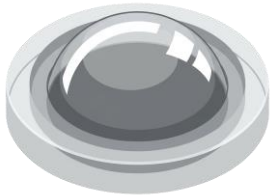
Optical units for
projectors



**Optical components
for semiconductor
inspection systems**

Strong foundation

High-precision spherical lens processing

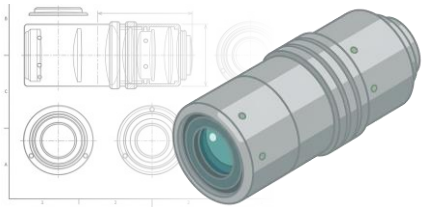


- λ/40-level high precision polishing
- Centering processing to maintain optical axis alignment

Thin-film coating

- Thin-film coating for enhanced performance of optical components

High-end optical design



- Virtual design and simulation of optical performance
- Achieving required performance through correlation with evaluation results

Evaluation & alignment

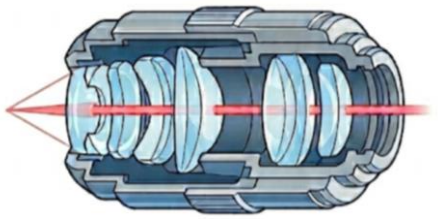
- Design and evaluation integration with proprietary inspection systems
- High-precision alignment capability

Optical Components for Semiconductor Inspection Systems

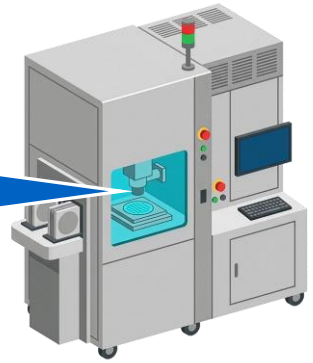
Optical Components as Key Parts | Wafer Inspection Process

Front-end process

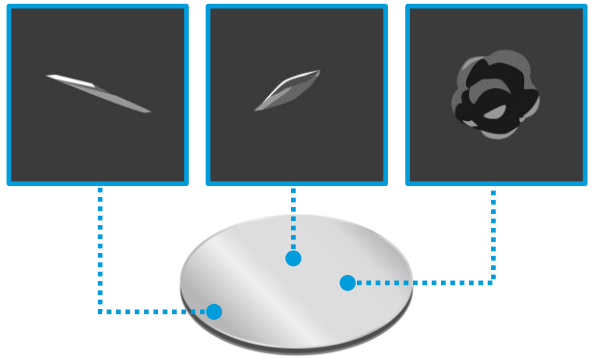
Supporting inspection process through collaboration with partner



Optical component
Konica Minolta

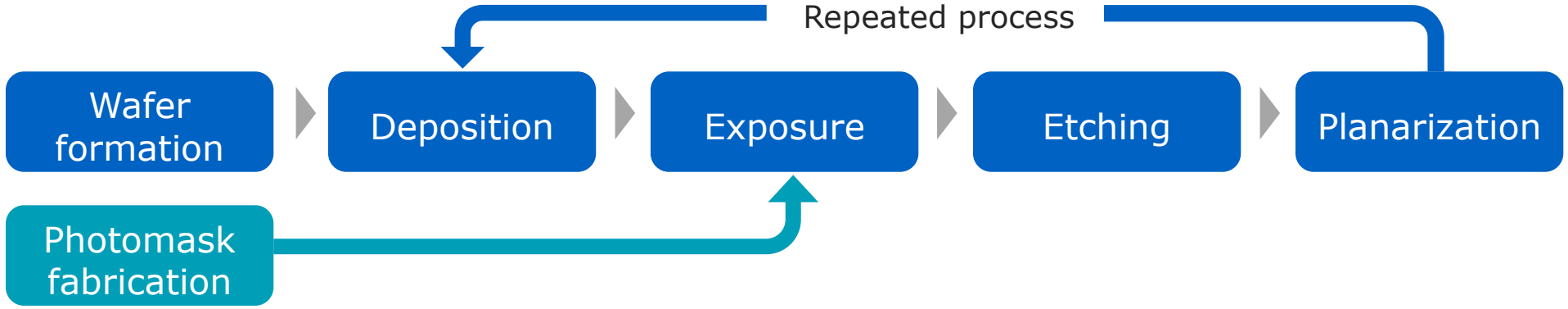


Wafer defect
inspection system
Customer

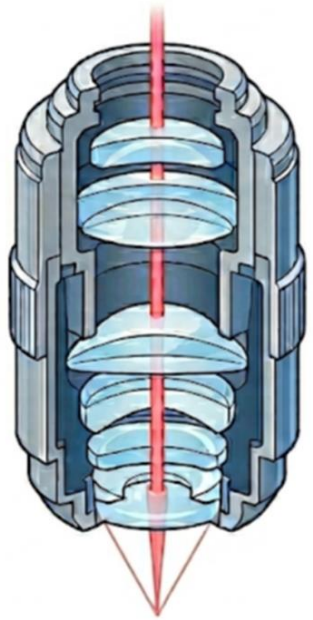


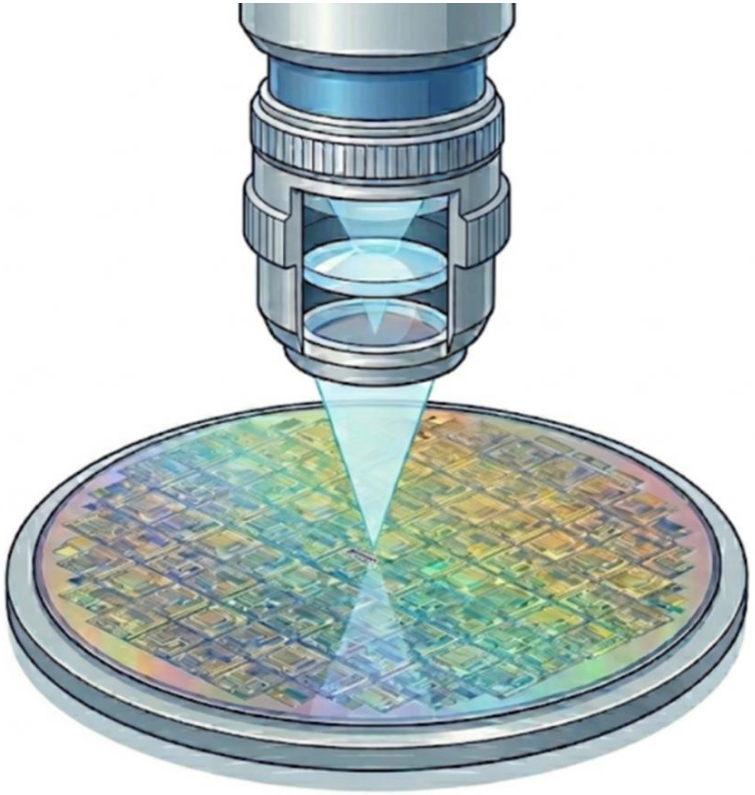
Microscopic defect
detection

Back-end process



Optical Components as Key Parts | Wafer Inspection Process





Demanding performance requirements

- High resolution, high NA
- Ultra low aberration
- High transmittance

Core technologies

- Optical design and simulation
- High-precision lens manufacturing
- Optical coating
- Precise alignment and adjustment
- Evaluation technology

Our Growth Opportunities

- Development meeting customer requirements
- Deep customer engagement

- Growing semiconductor and inspection markets
- Expansion of VIS/UV driven by multi-chip integration

- Supply volatility of key suppliers
  - ✓ withdrawal
  - ✓ shift in focus

Becoming a Core Partner through Strengthened Collaboration

Strengths

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Robust partnership

Inspection system manufacturer

FY22

Building trusted relationships

FY25

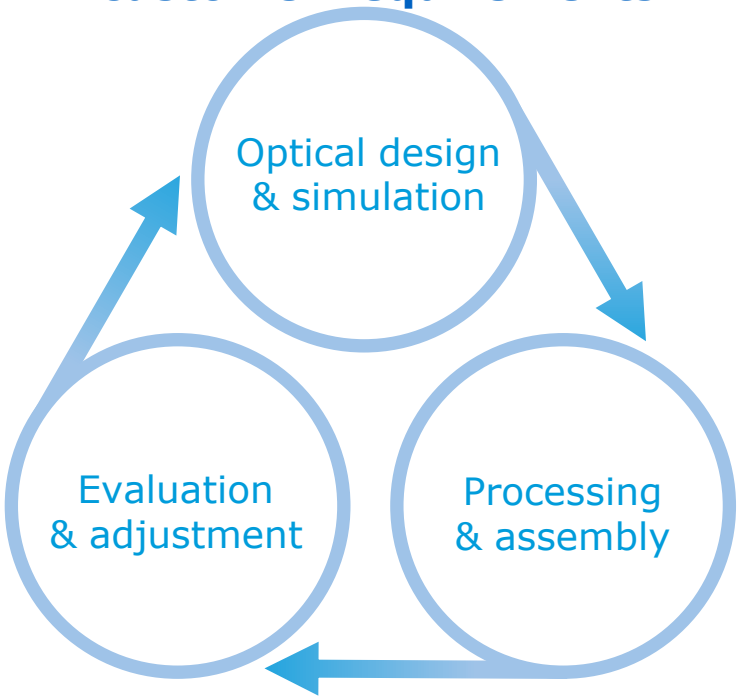
Becoming a strategic partner

Target state

Becoming a core partner

We are a trusted strategic partner, developing products to meet the customer requirements

Development meeting customer requirements



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Deep customer engagement

- **Development: Harmonization with customers' business processes**
- **Production: Vertically integrated in house end-to-end system**
- **Marketing/Sales: Customer-first proposals**
- **Service: Co-development partnerships to support customers' executing their roadmaps**

Market Structure:
Optical Components as Key Parts Supporting Semiconductor Sector

Market

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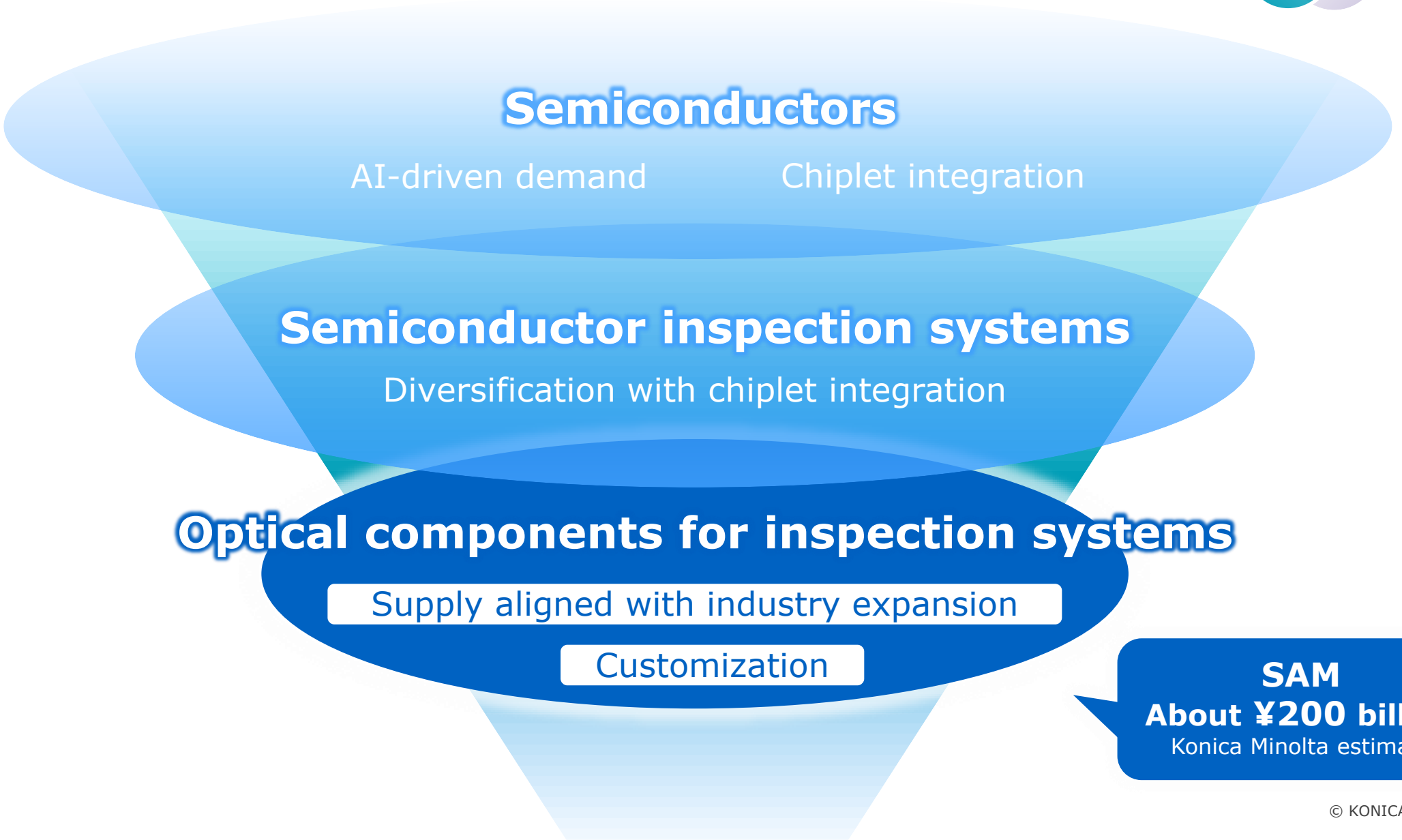


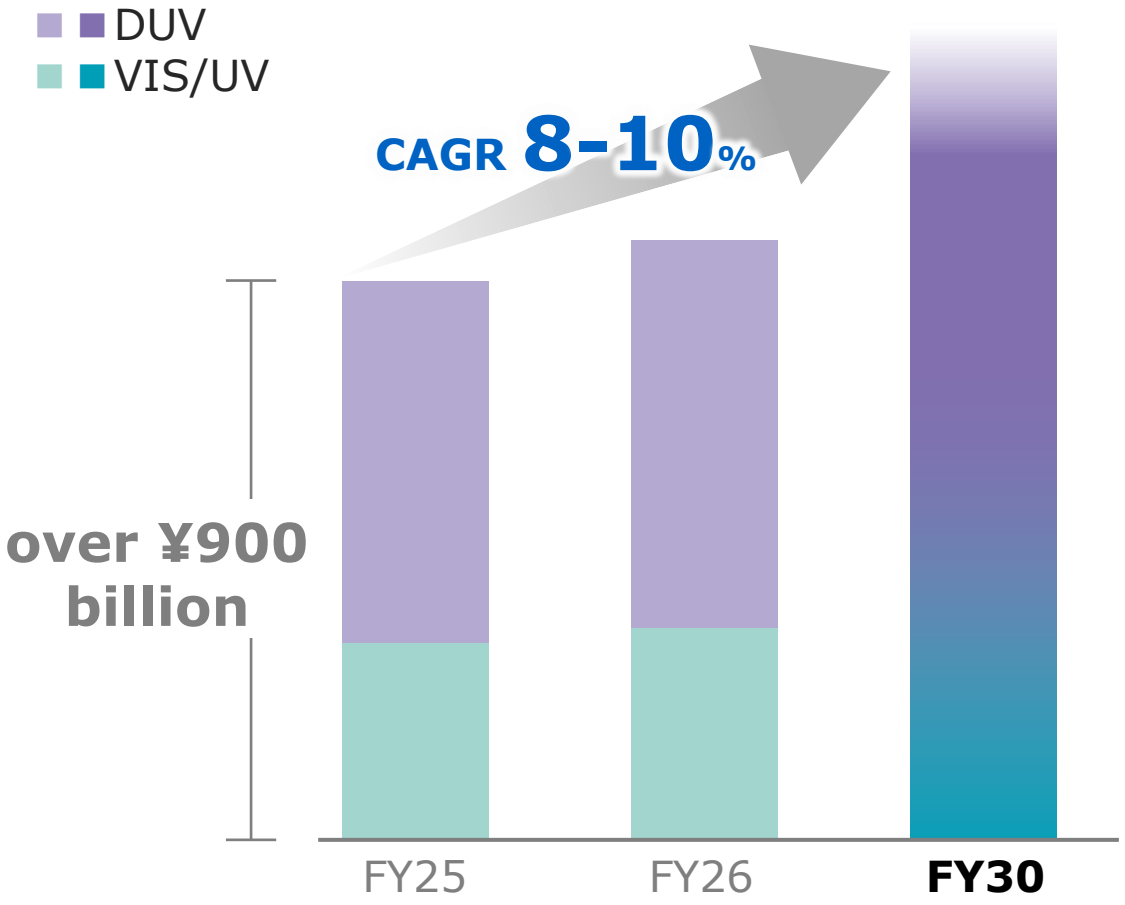
SAM
About ¥200 billion
Konica Minolta estimate

Growth in Wafer Defect Inspection Systems and Optical Components

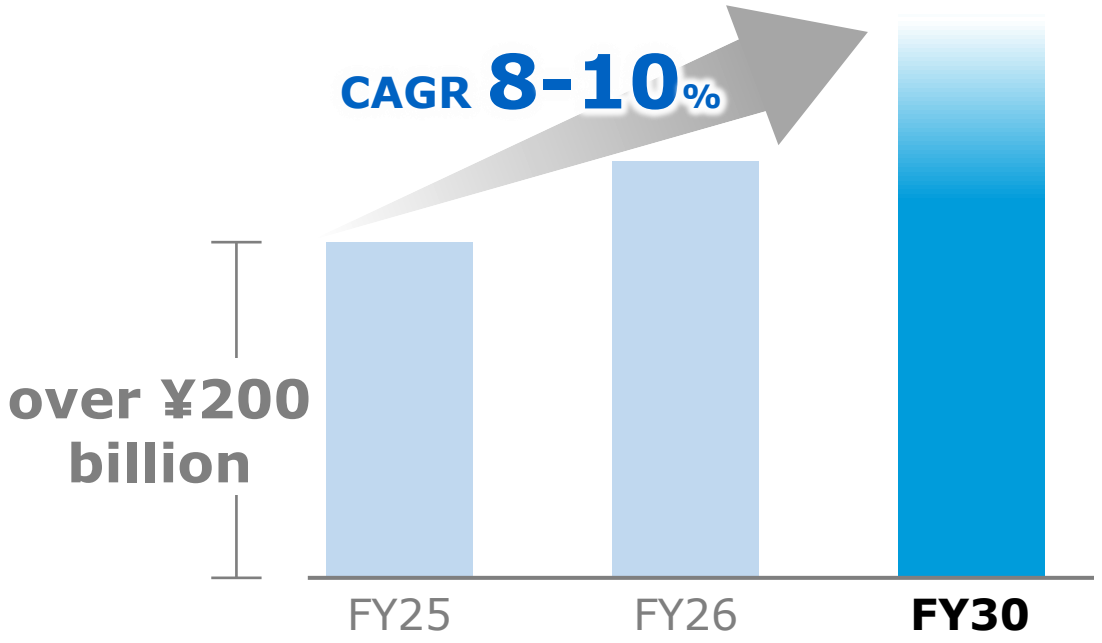
Market

Driver: AI including logic and memory

Wafer defect inspection systems



Optical components for inspection systems



* Konica Minolta estimate

Targets in Wavelength

Market

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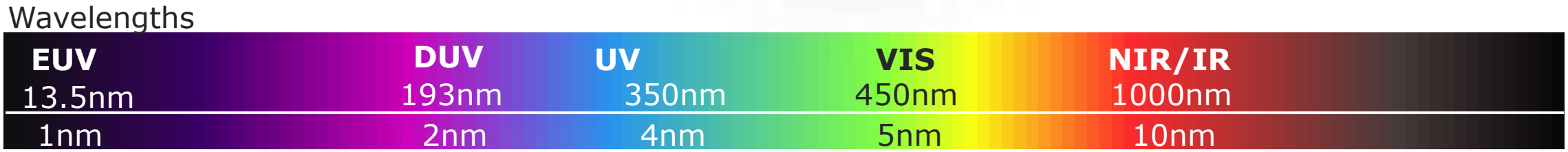
Step1 **VIS/UV**

Our core expertise built by optical units for projectors and related products



Step2 **DUV**

Next target for technology acquisition and business expansion

Further Opportunities in Optical Component Needs with New Semiconductor Manufacturing Process

Market

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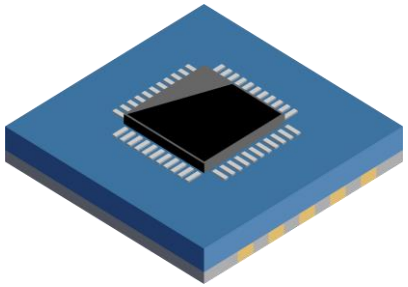
High growth potential for AI-oriented semiconductors

Front-end process | Back-end process/Advanced packaging

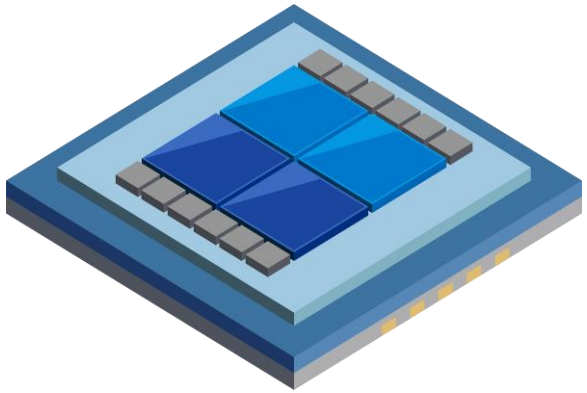
Monolithic



- Different circuits integrated on a wafer
- Higher performance with advanced miniaturization

DUV-based inspection required for AI logic semiconductors

Chiplet packaging



- Performance enhancement with connected chips with different precision levels
- Lower precision level than for monolithic for certain types
- Diversification of inspection items

Growth of VIS/UV inspection needs in AI logic semiconductors

Multi-chip Integration Drives Expansion of VIS/UV Inspection in AI/logic and Memory

Market

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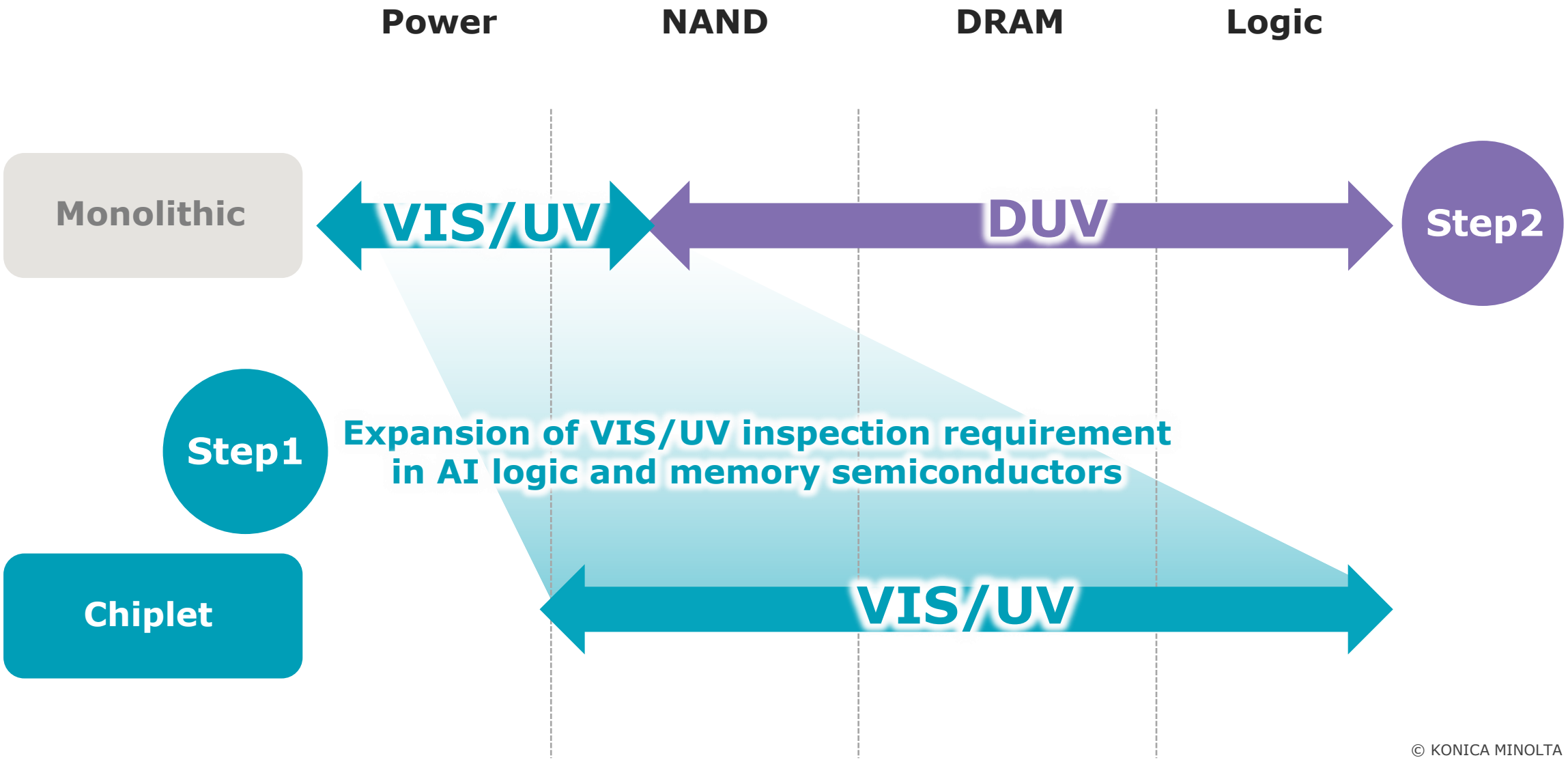

Rising Expectations for Konica Minolta amid Competitors' Withdrawals and Shift in Focus

Competitive Landscape

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VIS/UV

Company A	**Partial withdrawal**	Focus on lenses for other applications
Company B	**Shift in focus**	Focus on lenses for other applications
Company C	**Limited supply**	VIS/UV lenses with limited production capacity

and others

DUV

Supply instability due to withdrawal and shift in focus

+ Entry Difficulty: High

Future Strategy

Growth Strategy

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Step1

Market share increase in VIS/UV

- Growth in semiconductor demand
- AI logic semiconductors with multi-chip integration
- Increasing demand for stable supply

Step2

Mid- to long-term: Expansion into DUV

- Growth in semiconductor demand – especially dramatic growth in DUV
- Increasing demand for stable supply

Our strategy

- Increasing production capacity
- Improving production efficiency
- Next-generation processing equipment
- Chemical contamination control

Growing Together with Strategic Partner

Step 1

Scaling Production Capacity through Existing Assets and DX

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Increasing Production capacity

Mother factory at Osaka Sayama

Expanding production lines

Second factory at Hachioji, Tokyo

Start of new production lines in March 2026

Improving production efficiency

DX-driven processing standardization with NC machine

- Enhanced quality with process data visualization
- Standardization with quantification of expert skills

FY26 Capacity expansion **2.6x** (vs FY24)

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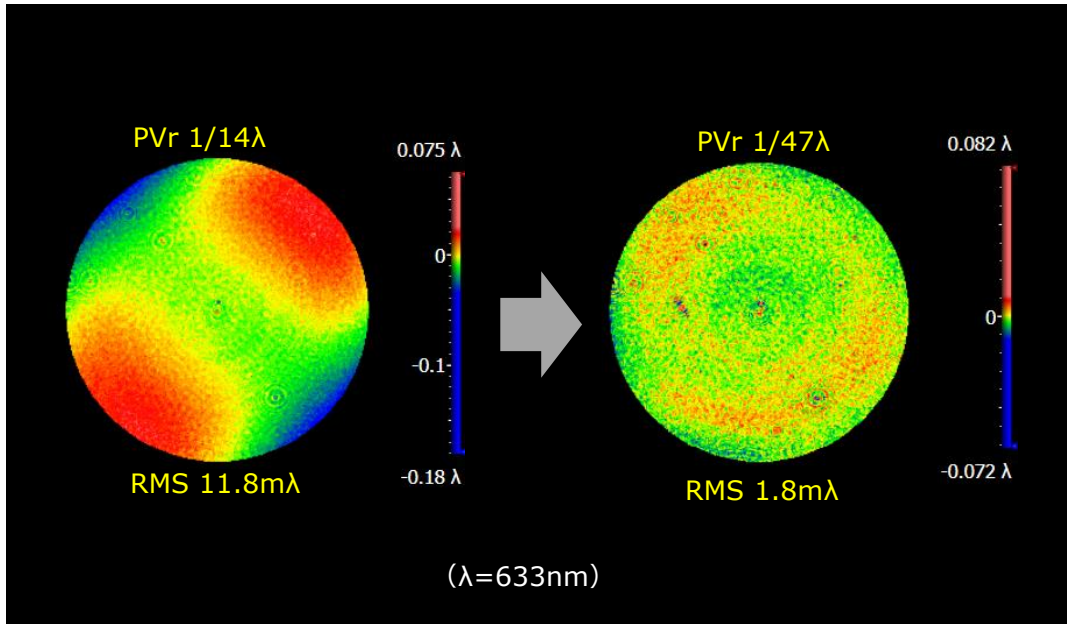
Strengthening DUV technologies through strategic partnerships

To now

Ion Beam Figuring (IBF)

Next-generation processing equipment

High-precision polishing for DUV-wavelength inspection



Ongoing

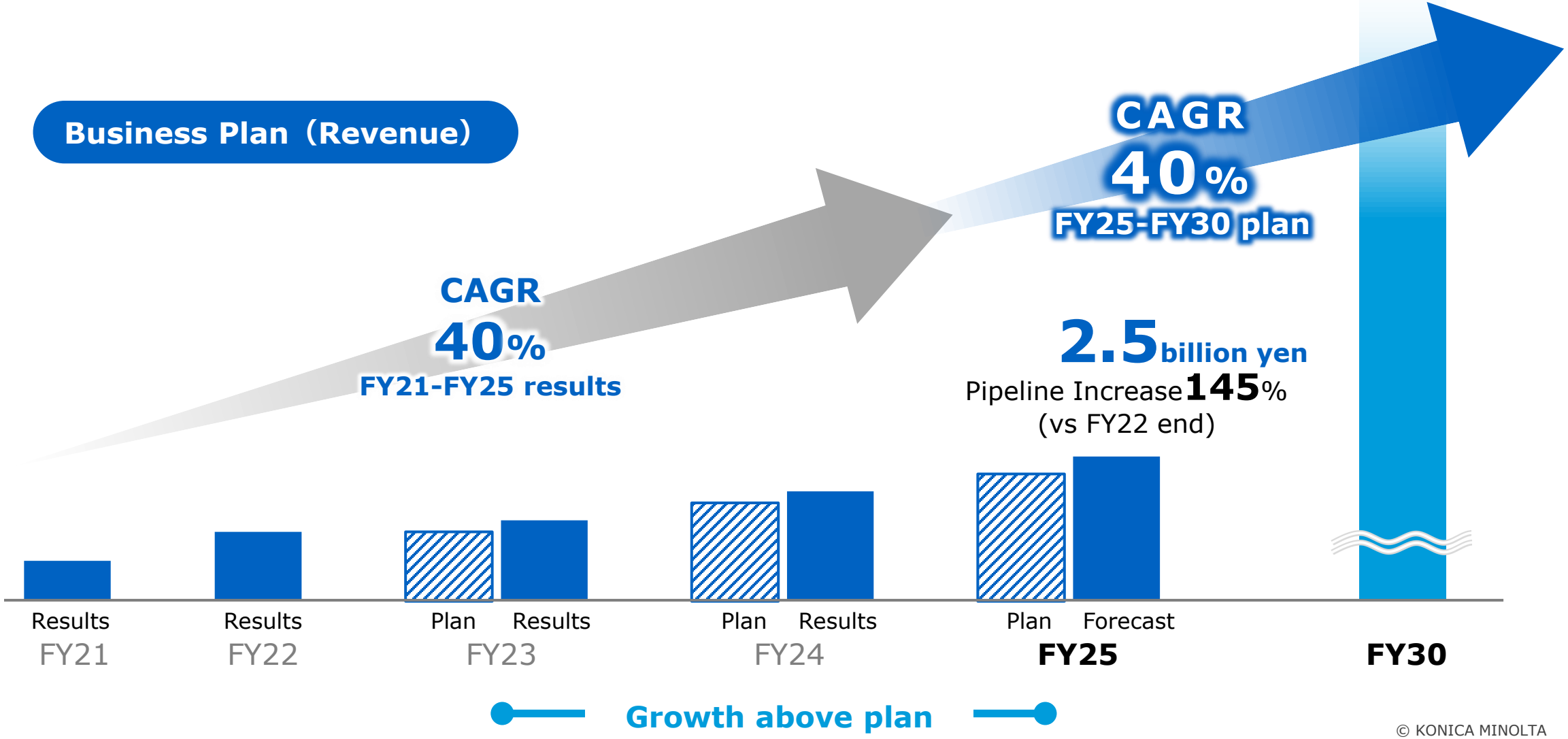
Clean technology enhancement

Chemical contamination control

Technologies for clean environment management, specialized cleaning, material selection, and packing

Outlook for Optical Components for Semiconductor Inspection Systems

- One year ahead of plan with strong performance in VIS/UV
- Expansion into DUV, aiming to become a top in-house supplier for major manufacture



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Cautionary Statement:
The forecasts mentioned in this material are the results of estimations based on currently available information, and accordingly, contain risks and uncertainties. The actual results of business performance may sometimes differ from those forecasts due to various factors.

Remarks:
Yen amounts are rounded to the nearest 100 million.