Canon Inc.

2025 Corporate Strategy Conference

Industrial Group

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Performance Outlook

Industial Group Consolidated Performance

(Billions of yen)

Net sales / Op. profit / Op. profit ratio

	2020	2021	2022	2023	2024	2025
Net sales		337.7	329.2	314.7	356.5	424.2
Op. profit		44.9	58.0	58.6	68.9	76.3
Op. profit ratio		13%	18%	19%	19%	18%

Net sales/Op. profit: 0, 100, 200, 300, 400, 500, 600

Op. profit ratio: 0%, 5%, 10%, 15%, 20%, 25%, 30%, 35%, 40%

CAGR 16% or more

Maintain high profitability while boldly investing in development and production to achieve sustainable business expansion

Semiconductor and Display Market Trend

Semiconductor Market

US $ B

Legend
O-S-D
Analog
Logic
Micro
Memory

Y-axis: 0, 100, 200, 300, 400, 500, 600, 700, 800, 900, 1,000

X-axis: 2023, 2024, 2025, 2026

Note: O-S-D Optical Sensor Discrete Device

Display Market

M [Units]

Legend
OLED
LCD

Y-axis: 0, 500, 1,000, 1,500, 2,000, 2,500, 3,000, 3,500

X-axis: 2023, 2024, 2025, 2026

Semiconductor market continues to grow, driven by strong demand for AI applications

Display market is on a recovery trend, due to increase in usage and added value for OLED panels

Results & Challenges up to 2024 and Strategies & Measures

Canon

Results up to 2024 & Challenges

- Rolled out competitive products into robust semiconductor market and achieved significant increase in unit sales
- In addition to nanoimprint, launched products for leading-edge device market, such as 3D packaging etc.
- Challenges: Expand market share and improve profitability in recovering display market

Strategies & Measures for future growth

- Further raise competitiveness of semiconductor manufacturing equipment and secure production capacity to meet market demand
- Expand nanoimprint sales and establish an ecosystem for semiconductor device mass production process
- Strengthen product and profitability of display manufacturing equipment and expand aftermarket business

Business Strategy

- Expand in scale, scope, and application of semiconductor manufacturing
- Raise competitiveness of manufacturing equipment for OLED displays
- Strengthen and expand data solutions business
- Cultivate new business domains through integration of core technologies

Canon Semiconductor Manufacturing Equipment Line-up

Semiconductor chip manufacturing process

Wafer → Wafer bonding → Deposition → Coat → Exposure (Front-end) → Develop → Etch → Dicing → Die bonding → Inspection → Semiconductor chip

Canon ANELVA Corp.	Canon ANELVA Corp.	Canon Inc.			Canon Machinery Inc.	Canon Machinery Inc.
Atomic Diffusion Bonding Equipment	Sputtering Equipment	i-line Steppers	KrF Scanners	Nanoimprint Lithography Equipment	Die Bonder	Wire Bonding Inspection Equipment

Semiconductor device

Package manufacturing process

Substrate → Deposition → Coat → Exposure (Back-end) → Develop → Etch → Cutting → Coining → Inspection → Package substrate

Canon ANELVA Corp.	Canon Inc.	Canon Machinery Inc.	Canon Machinery Inc.
Sputtering Equipment	i-line Steppers for Advanced Packaging	Substrate Cutting Equipment	Substrate Coining Equipment

Expand Scale, Scope, and Application of Semiconductor Manufacturing

More Moore : Miniaturization	More than Moore : Diversification

Logic · CPU · Memory · Image sensor · RF/MEMS · Power/LED · Packaging

Nanoimprint Semiconductor Manufacturing Equip.
FPA-1200NZ2C

ArF Litho. Equip
FPA-6300AS6
(under development)

High Productivity KrF Litho. Equip.
FPA-6300ES6a

High Productivity i-line Litho. Equip.
FPA-5550iZ2

i-line Litho. Equip. for IoT Devices
FPA-3030i6 / FPA-3030iWa

Litho. Equip. for WLP
FPA-5520iV

Litho. Equip. for PLP
FPA-8000iW

Wafer Alignment Measurement Device
MS-001

Product for manufacturing of Semiconductor and Electronic Devices
Adastra series

Atomic Diffusion Bonding Equip.
BC7300

Epoxy Die Bonder
BESTEM_D610

Respond to growing demand for equipment by providing a lineup for fine processes to rough layers.
Launch strategic products into leading-edge AI devices, power devices, and advanced packaging market.

Evolution of Semiconductor Devices (Three Trends)

More than Moore

More Moore

Advanced Packaging

3D Structuring

Advanced Patterning

Larger package size

3D Structuring

Shorter-Wavelength
Higher-NA

Chiplet

CPO

BS-PDN

CBA

FinFET

GAA NS

Forksheet

Semiconductor devices continue to evolve in both More-Moore and More-than-Moore
Three major trends: Advanced Patterning, 3D Structuring, and Advanced Packaging

1) Advanced Patterning: Nanoimprint Lithography Technology

■Form fine and clear circuit pattern of around 10nm using a simple stamp principle

Nanoimprint Semiconductor Manufacturing Equipment

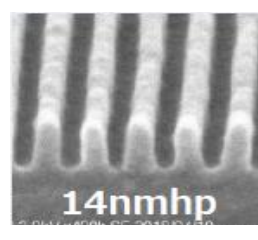
FPA-1200NZ2C

Achieved miniaturization in 10nm range and 3D single patterning.
1/10 of power consumption compared to EUV for advanced device manufacturing.

・**Launched in October 2023, sold to TIE in 4th quarter of 2024**
・**Received the Sankei Shimbun's 33rd Global Environment Award**

Logic

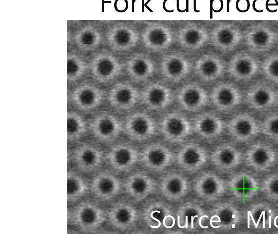
Move to development phase for use in 2nm node and beyond



DRAM

CoO and TAT reduction in complex processes by single-step formation

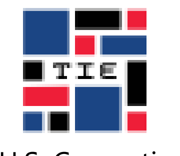
Fork cut process



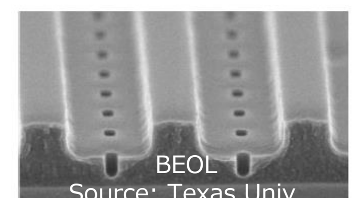
Contact hole process

Next-generation AI chip

Verifies manufacturing of next-generation devices such as AI chips

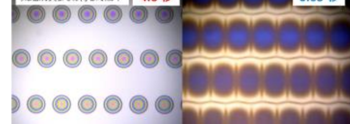


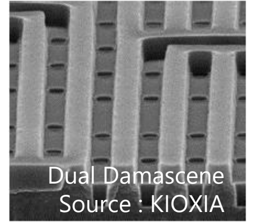
U.S. Consortium



3D-NAND

Introduced Canon photo resist to shorten imprint time



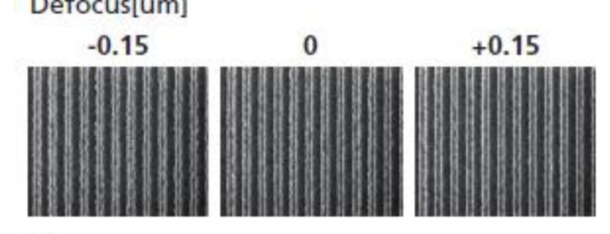


Accelerate partnership with several major customers, combined with industry-government-academia collaboration to promote the value of nanoimprint.
Promote installation and process verification at customer sites to realize mass-production for advanced devices.

1) Advanced Patterning: Development of ArF Lithography Equipment

ArF Lithography Equipment
FPA-6300AS6（under development）

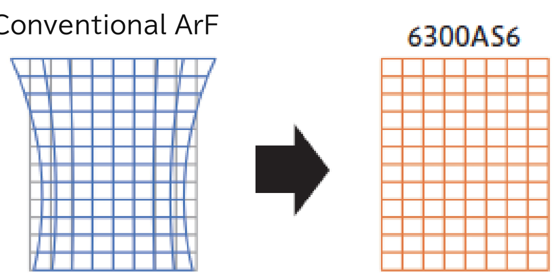
65nm L/S pattern results



※ Lighting mode NA0.93, 4/5Annular

65nm resolution was achieved using newly developed projection lens

Shot shape correction capability



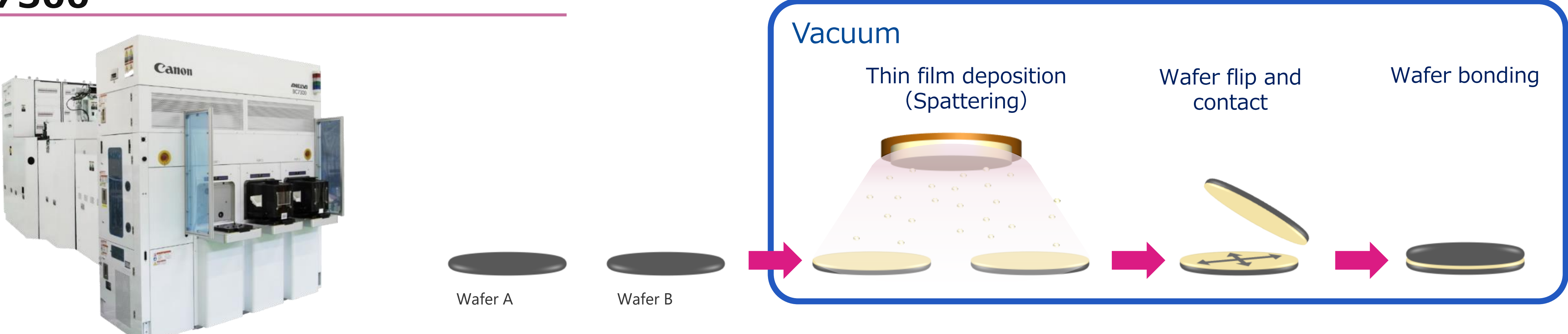
New correction system enables high-order shot correction shapes and improves overlay accuracy

Newly developed projection lens enhances process response and supports a wide range of device manufacturing.
Use the proven KrF main platform for stable performance and low Cost of Ownership.

2) 3D Structuring： Wafer Bonding Equipment

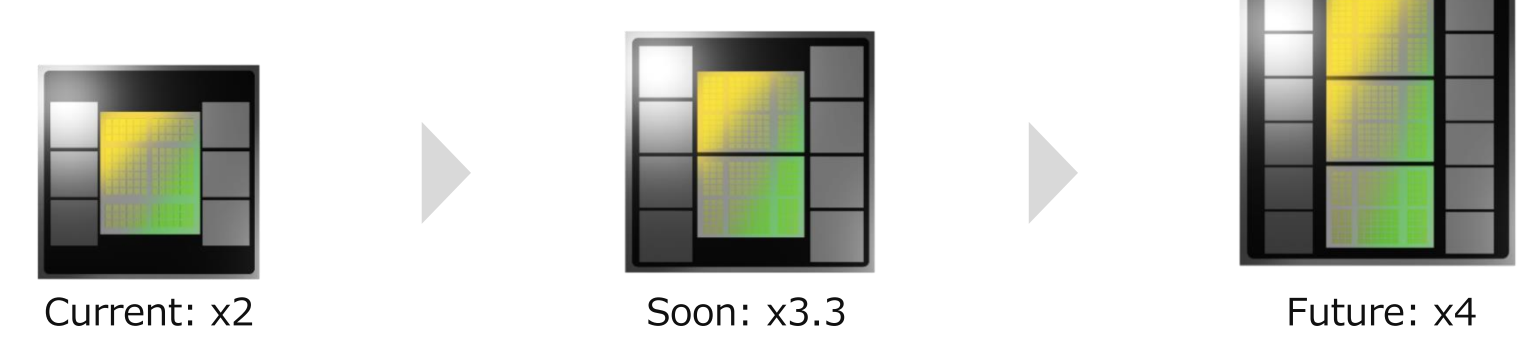
Atomic Diffusion Bonding Equipment

BC7300



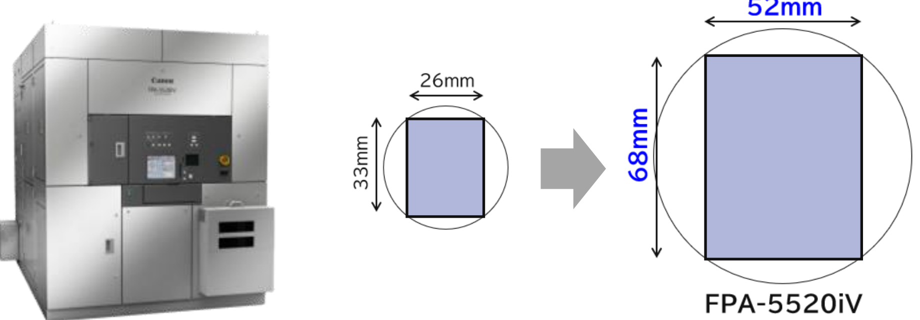
Provides 3D integrated solutions for various devices with technology for bonding wafers at room temperature and without pressure.

3) Advanced Packaging: Addressing Larger Package Sizes



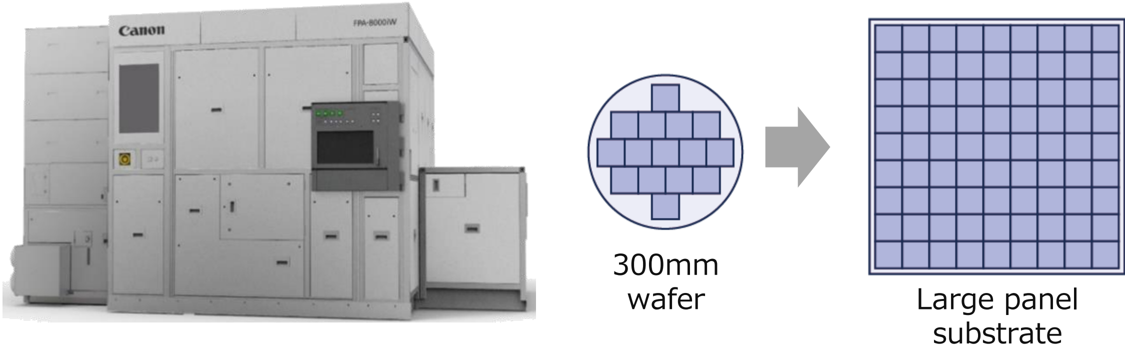
Lithography Equipment for WLP
FPA-5520iV LF2

0.8 µm resolution across a 52mm × 68mm single-exposure field (Current x4)



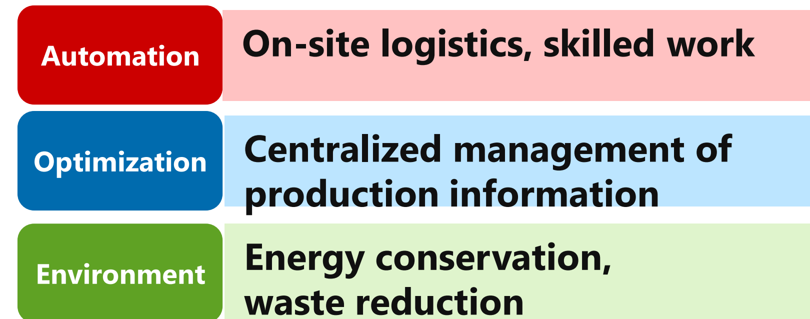
Lithography Equipment for PLP
FPA-8000iW

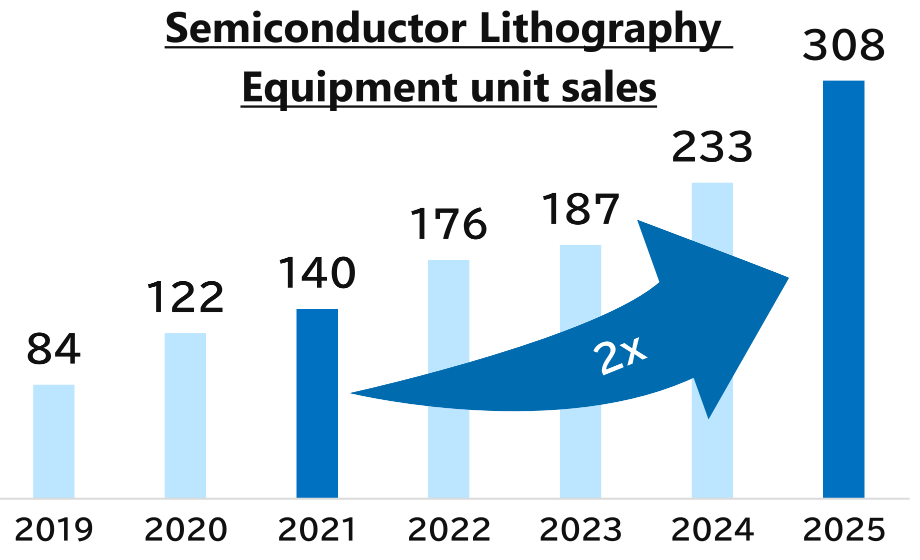
i-line stepper for packaging of large square substrates up to 515 mm x 510mm



Further strengthen Canon's position established in the rapidly evolving and expanding advanced packaging field

Enhance Production Capacity with New Facility at Utsunomiya site





Concept of new factory

Automation	On-site logistics, skilled work
Optimization	Centralized management of production information
Environment	Energy conservation, waste reduction

Steady progress in construction

Establish a production system to meet growing demand in the semiconductor market