

Plasma Control Technologies

Growth with RF power supplies through close customer cooperation



Michael Kammerer, President of Plasma Control Technologies

Agenda

- 1 PCT Business Environment
- 2 PCT Growth 2013 – 2015 at a Glance
- 3 Accelerating Growth through close Customer Collaboration
- 4 Strategic Update
- 5 Summary of strategic Initiatives

Mobility trend is driving the Semicon Industry

End Market



Consumers expect more and more

- compact digital devices (form)
- faster digital connectivity
- improved performance
- reduced energy consumption

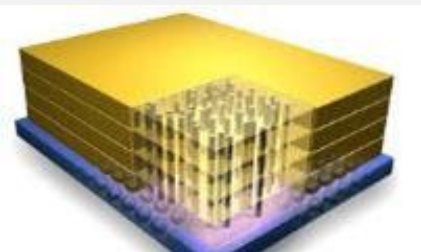
Our Market



Semiconductor OEM demand continues to be strong

- Wafer fab equipment spendings expected to rise up to 15% in 2014 vs. 2013
- Semi business is heavily driven by demands for 3D chips

Technology



3D & V-NAND chips are leading the way in the future

- for increased packing density and efficiency
- Multiple patterning requires more process steps
→ more deposition & etching

Strong Growth of Tablets is driving the Display & Flatpanel Business

Display



Display and Flatpanel business continues to recover after ~1.5 years of overcapacity

- Strong growth of tablets and other mobile devices is fueling new investments
- OLED technology will fuel demands additionally

Solar



Slight recovery in solar business expected in China

- Solar market continues to be in overcapacity mode globally;
- Exception is China → 80% of worldwide solar equipment demand driven by government funding
- PCT is engaged with the right high potential customers (13MGz/40MHZ) – thin film

New Markets



New markets / applications to diversify business outside of highly cyclic semi market

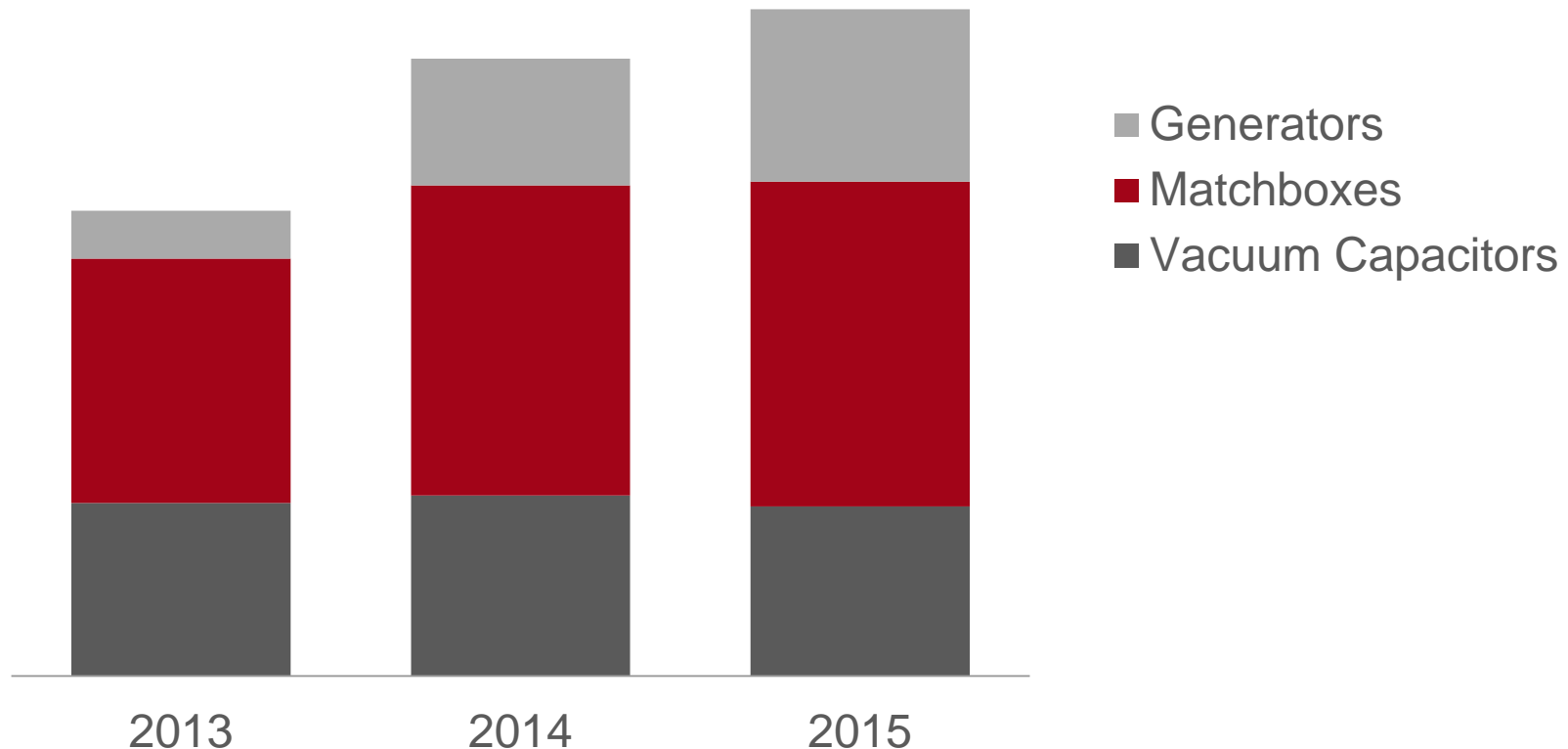
- Laser, Medical, Industrial heating and LED

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RF Power Supplies are the most important growth contributor

- Continuous strong development of RF generators and RF matchboxes
- Gaining market shares in Vacuum Capacitor business



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Accelerated Growth through close Customer Cooperation means ...



Customers / Markets

Be close with local presence for existing and new customers

Collaborate early in the development processes

Push sales of standard products



RF Solutions

Focus on the right technology
(13MHz - 100MHz,
medical up to 600MHz)

High R&D competences for new product development



PCT People

Establish global teams to respond fast to customers demands/requirements

Further investment in sales force and application teams

Growth

Products with perceived added value to the customer

Customer base expansion

Business Development /new markets

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Customers / Markets: Penetration



Expected
Sales Share in 2013

USA



Further penetration of Top Customers (Lam/Applied) with customized RF Matchboxes and Generators
Highly trustful and close customer partnership

59%

KOREA



New COMET branch (Q4/ 2013) to be very close to new high potential customers (Samsung & new OEM's).
Establish PCT as top strategic RF power partner

CHINA / Taiwan



Expanding customer base with new customers (NMC)
Push sales of standard products
Expand Sales Team & Service Organization (customer support)
Business Development Strategy

30%

JAPAN



Defend market leadership with Vacuum Capacitors
Opportunities RF Business – TEL/AMAT

*11%
Europe & ROW



Customers/ Markets: be close to new and existing customers

Korea defined as strategic growth market

- Opening of COMET Branch in Korea in Q4 2013
- Focus on Samsung and related OEMs for semi
- New project opportunities in display coating / OLED

Gain new customers in China

- Strengthening of sales force and customer support
- Engaged with new OEMs in emerging semi market
- Expand business to smaller and mid-sized customers for standard RF
- Further develop Solar/LED opportunities

Fully exploit opportunities for RF generators

- Acquire customers in generic applications (Laser, Medical, Industrial)



RF Solutions: added value product portfolio

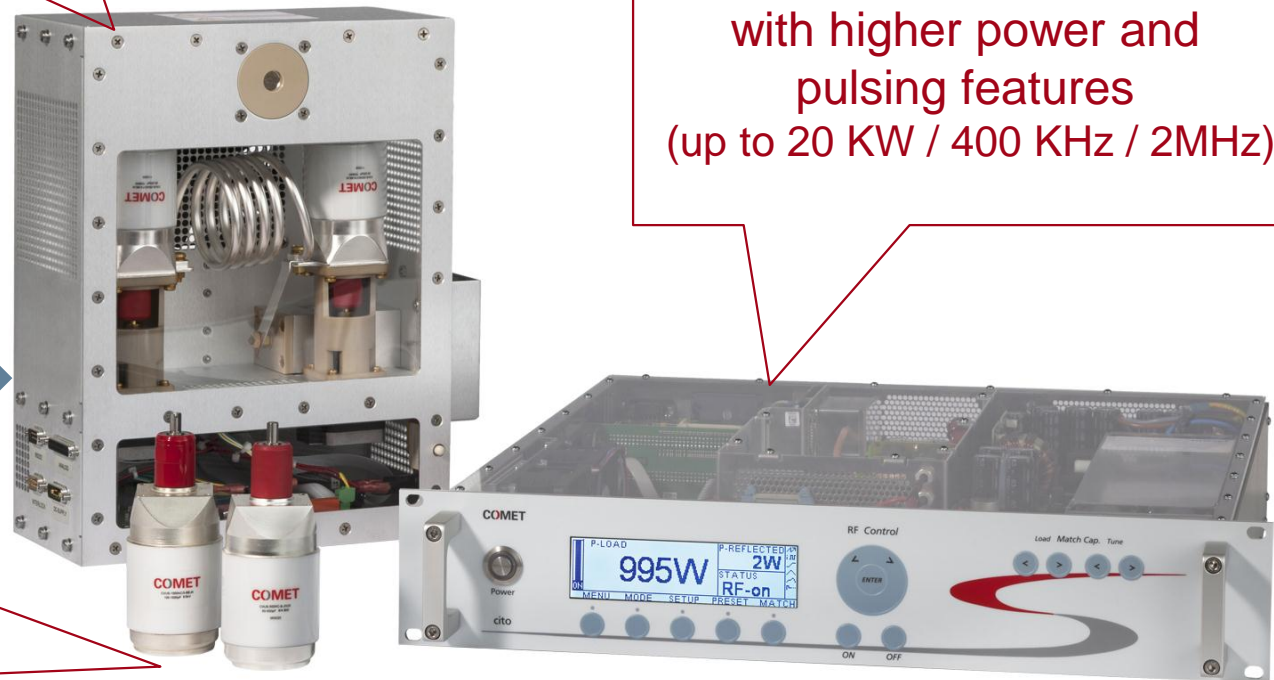


New control board & sensor technology

Enlarged product portfolio with higher power and pulsing features (up to 20 KW / 400 KHz / 2MHz)

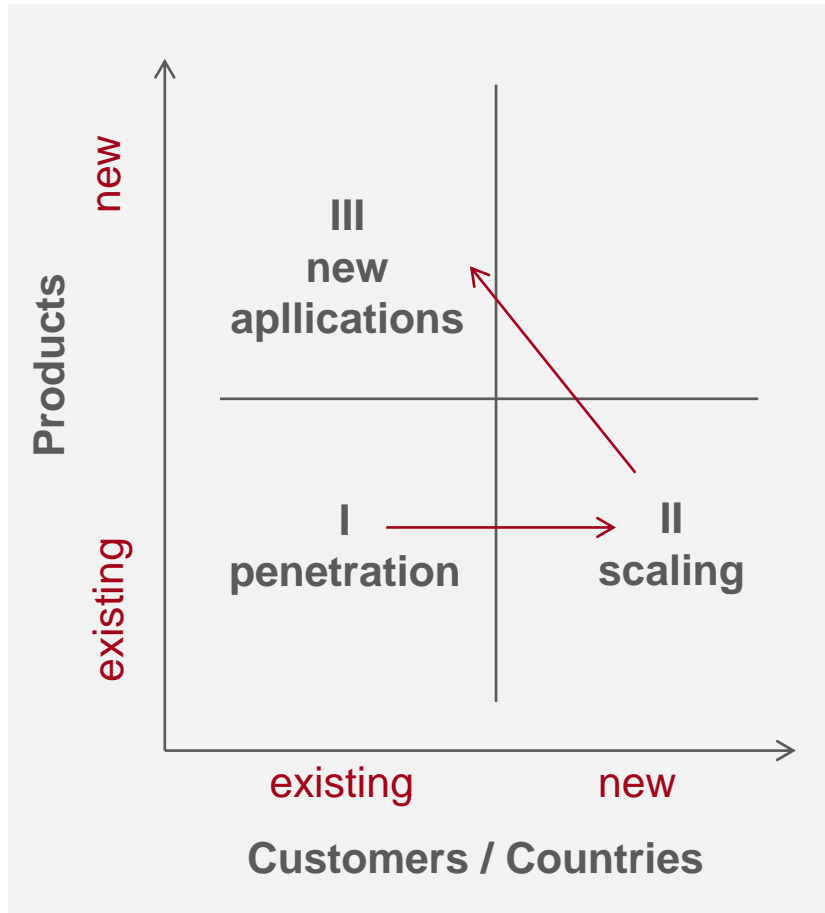
Learn more about in the future lab

Fast capacitor design with integrated drive





Business Development Strategy for RF Generator Portfolio



- Goal: Address new industrial applications outside the semicon market
- Leveraging from existing product portfolio to new customers
- Transfer technology know-how into new applications fields



Business Development Roadmap for RF Generators

- Set up BD function and process
- Potential applications for existing technology defined
- Detailed search to specify key markets with high success rate

- Focused market entry strategy with clear timeline, success factors and KPIs
- Stringent implementation
- First successes

- Expand application range
- Earning phase and further roll out

Focusing on using internal know-how for quick process and a rigorous implementation

2013

2014

2015

Accelerated Growth through close Customer Cooperation means ...



Customers / Markets

- ✓ Be close with local presence for existing and new customers
- ✓ Collaborate early in the development processes
- ✓ Push sales of standard products



RF Products

- ✓ Focus on the right technology (13MHz - 100MHz, medical up to 600MHz)
- ✓ High R&D competences for new product development



PCT People

- ✓ Establish global teams to respond fast to customers demands/ requirements
- ✓ Further investment in sales force and application teams

Growth

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PCT Strategic building blocks 2016

1

Key Technologies

- Vacuum and RF technology

2

Strong Growth

- Focus on top customers (Penetration LAM, AMAT)
- Business development Asia
- Strengthen sales / KAM organization
- Diversify businesses outside semi / solar

3

Emerging Business

- Push RF generator business

4

Operational Excellence

- Continuously improvement of LEAN production
 - Set up of LEAN administration
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