

# Business Briefing

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Digital Infrastructure Components

June 4, 2026

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# Agenda

## **1. Digital Infrastructure Components Markets and Basic Policy**

- 1-1. Market Overview
- 1-2. Basic Policy Toward 2030
- 1-3. FY2026 Policy
- 1-4. Net Sales and Operating Profit Trends

## **2. Business Division Growth Measures and Net Sales Forecast**

- 2-1. AT & Functional Plastics Division
- 2-2. Thermal Management Solution & Products Division
- 2-3. Memory Disk Division
- 2-4. Copper Foil Division
- 2-5. FITEL Products Division
- 2-6. Photonics-Electronics Convergence Devices Division

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# Digital Infrastructure Components Markets and Basic Policy

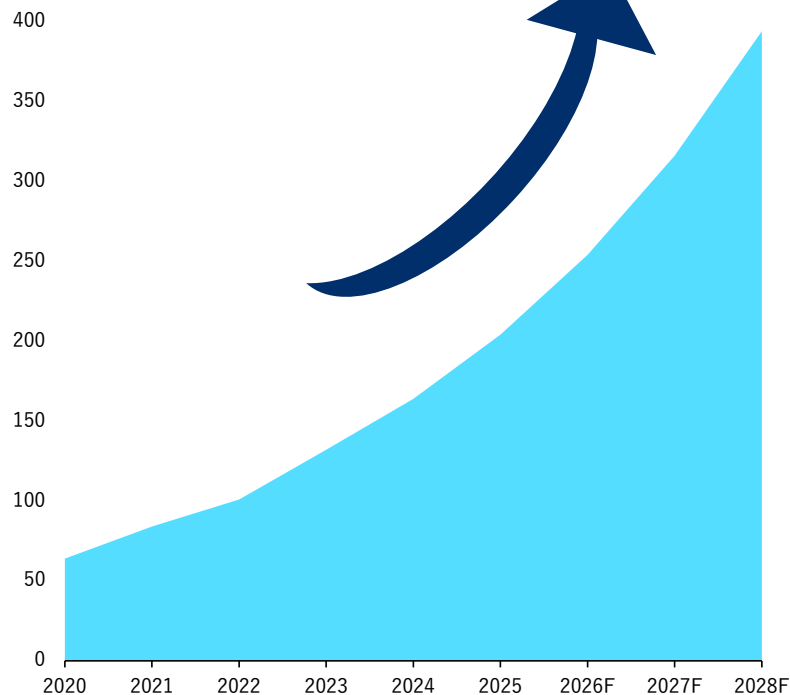
# Market Overview

Provide differentiated, high-performance products for AI and data center-related markets

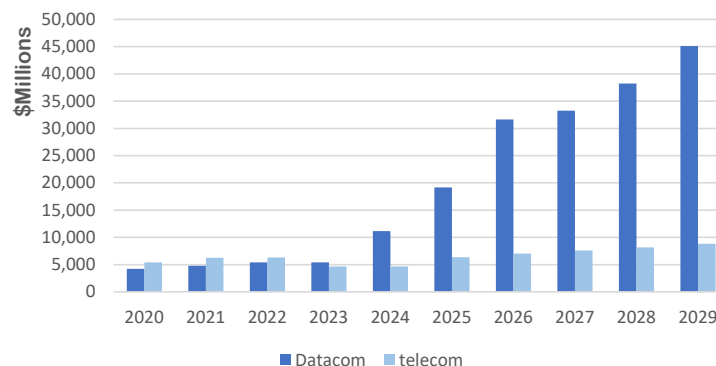
The volume of data generated world-wide and data traffic are expected to continue increasing.

Many businesses and product markets in this domain are expected to maintain medium- to long-term growth, driven by increasing data volumes.

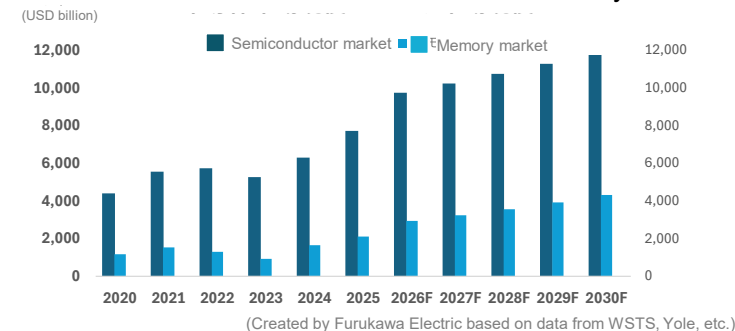
Data created and replicated worldwide\*  
(zettabytes)



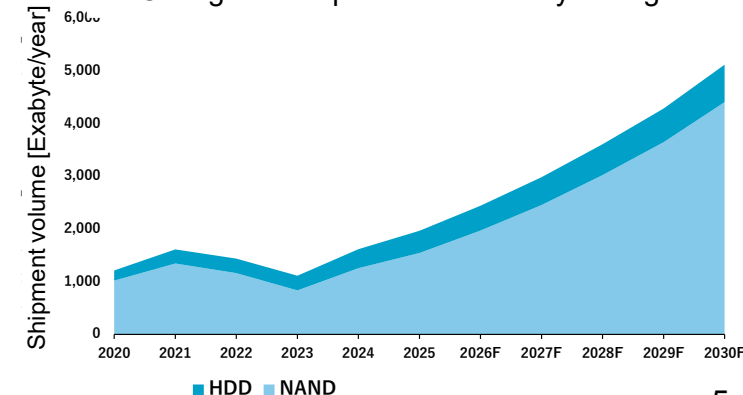
Optical components market size\*



Semiconductor market scale and memory market scale



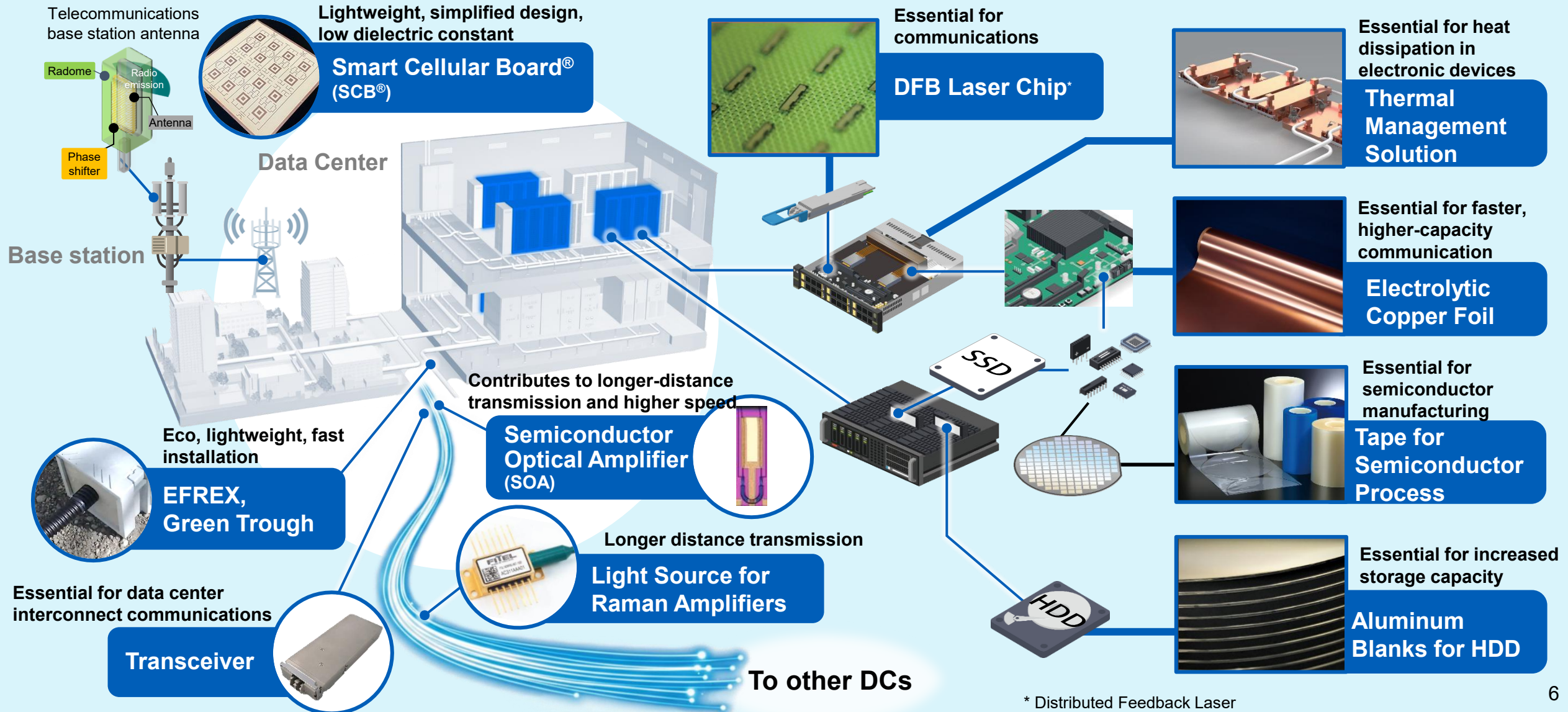
Changes in shipment volumes by storage\*



\*Created by Furukawa Electric based on materials from a research company

# Basic Policy Toward 2030

Continue to develop and provide high-performance, differentiated products for the data center (DC)-related market and achieve growth

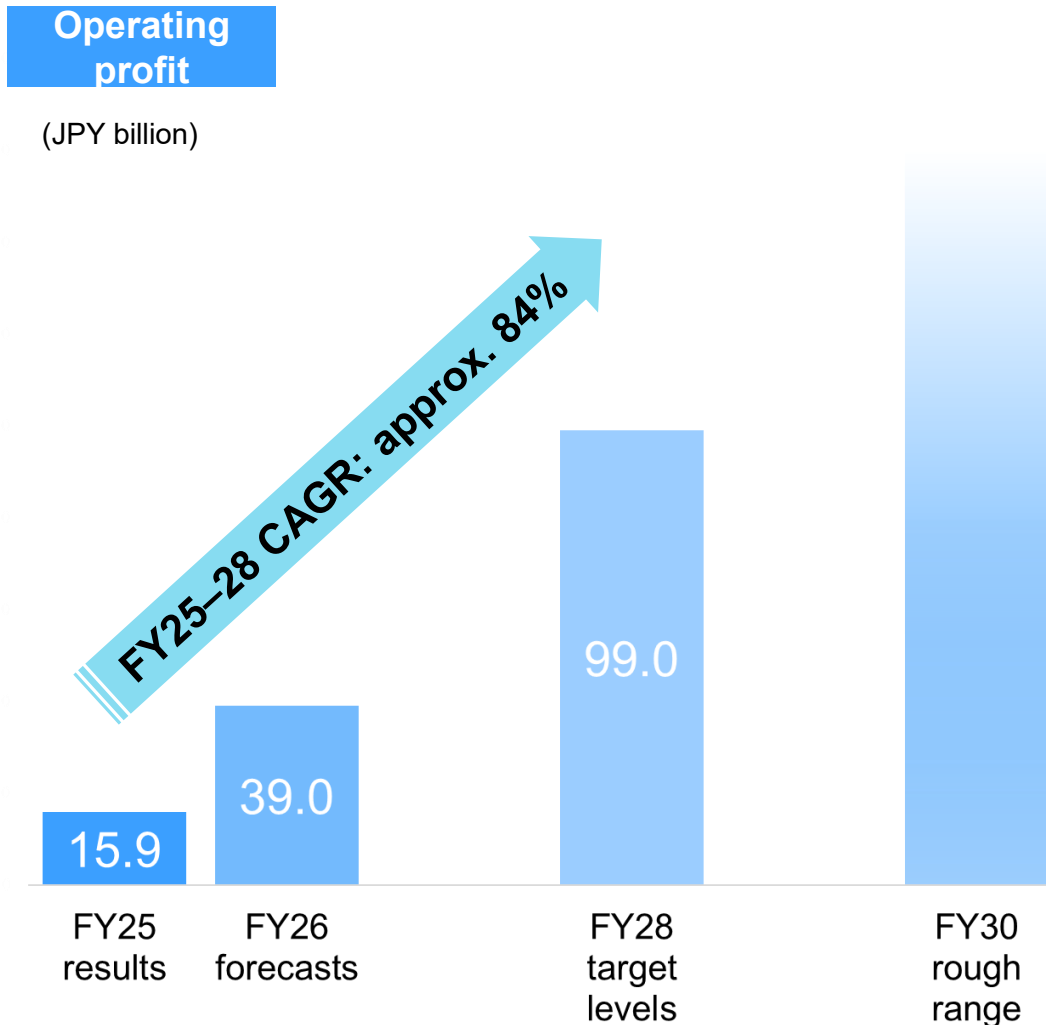


## Digital Infrastructure Components

- Continue proposing **high-performance, differentiated** products, and achieve growth by entering new fields and capturing new customers
- Establish a structure capable of responding quickly to changes in the **data center** market

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>AT &amp; Functional Plastics Division</b>                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>Thermal Management Solution &amp; Products Division</b>                                                                                                                                                                                                                                                                         |
| <ul style="list-style-type: none"><li>• Promote development of technology for advanced semiconductor processes, be the first to introduce high-value-added products, and expand sales through horizontal rollout</li><li>• Contributing to shorter data center infrastructure build lead times through a product portfolio leveraging total cable system design and foaming technologies</li><li>• Develop environmentally friendly products, and expand sales</li></ul> | <ul style="list-style-type: none"><li>• Provide differentiated solutions in line with customer policies and requirements as a core partner, and increase customer satisfaction</li><li>• Adapt to market and technology trends, establish a structure for quickly and proactively executing measures, and expand profits</li></ul> |
| <b>Memory Disk Division</b>                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Copper Foil Division</b>                                                                                                                                                                                                                                                                                                        |
| <ul style="list-style-type: none"><li>• Address growing demand for higher storage capacity per HDD through differentiated materials that enable thinning</li><li>• Expand sales volume of high-value-added thin products, which is a short- to medium-term KSF</li></ul>                                                                                                                                                                                                 | <ul style="list-style-type: none"><li>• Develop products that rapidly respond to changing customer requirements, and continue to provide high-performance, differentiated products to markets that will grow in the future</li></ul>                                                                                               |
| <b>FITEL Products Division</b>                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Photonics-Electronics Convergence Devices Division</b>                                                                                                                                                                                                                                                                          |
| <ul style="list-style-type: none"><li>• Capture demand for high-value-added products for data centers through capacity expansion investment and high-output laser technology</li><li>• Increase sales and profits by expanding supply capacity</li></ul>                                                                                                                                                                                                                 | <ul style="list-style-type: none"><li>• In response to advances in the photonics-electronics convergence market, further cultivate the modulator and transceiver markets, and establish businesses with a global presence</li></ul>                                                                                                |

## Digital Infrastructure Components



### Point

- Toward 2030, the data center market will continue growing
- Make large-scale investments in both the Thermal Management Solution & Products and FTEL Products, and achieve growth
- Promote proposal activities for new fields and customers, capturing market changes as growth opportunities, and aim to expand the businesses



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# **Business Division Growth Measures and Net Sales Forecast**

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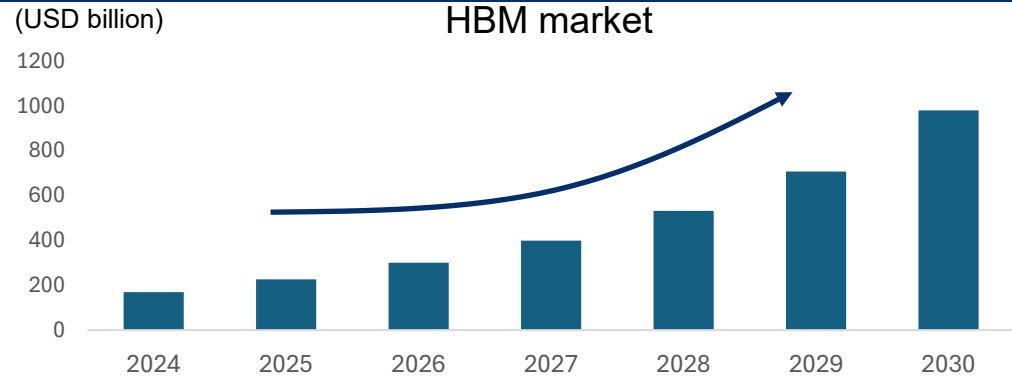
# AT & Functional Plastics Division

General Manager, AT & Functional Plastics Division

Shozo Yano

## Focus on high-value-added products for advanced processes, including AI semiconductors

### Expansion of demand for AI semiconductors, led by HBM



Created by Furukawa Electric based on survey materials from Yole, etc.

### Semiconductor device trends and issues

#### Trends

#### Technical issues

#### Thinner wafers

- Wafer thinning driven by the increasing number of chip layers
- Adoption of new processes that enhance wafer fracture strength such as stealth dicing

- ✓ Transparency that allows laser to pass through
- ✓ Chip singulation performance during wafer dicing
- ✓ Process compatibility with the stealth dicing

#### Diversification of wafer surfaces

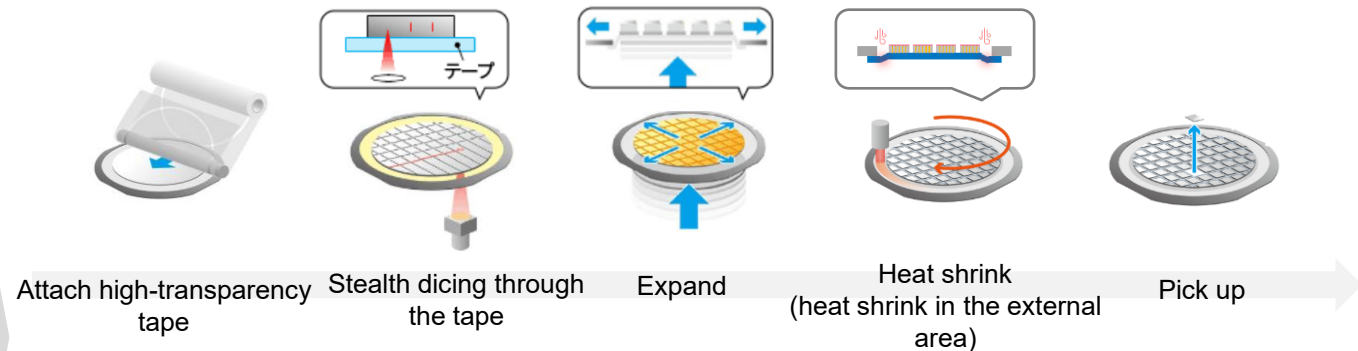
- Increasing complexity of wafer surface structures and conditions associated with the adoption of 2.5D and 3D packaging

- ✓ Achieve both low adhesive residue and good conformability on physically and chemically complex surfaces
- ✓ Easy removability from various surfaces

\*HBM: High Bandwidth Memory

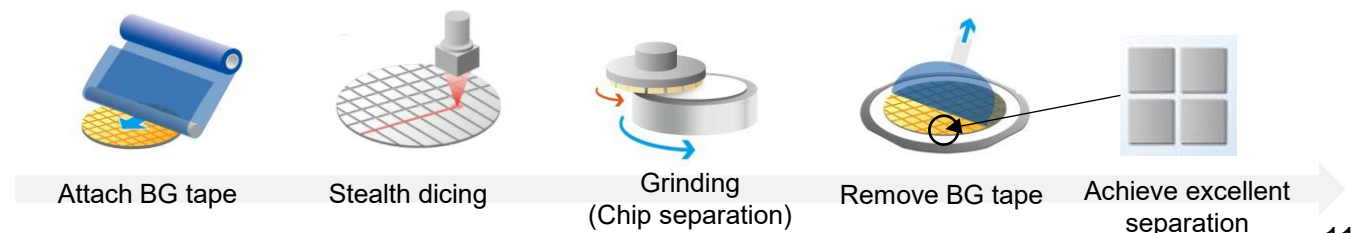
### Transparent DC tape for HBM\*

- ✓ Support wafer singulation through laser irradiation through the tape, enabled by high transparency
- ✓ Support the stealth dicing process through excellent chip singulation performance



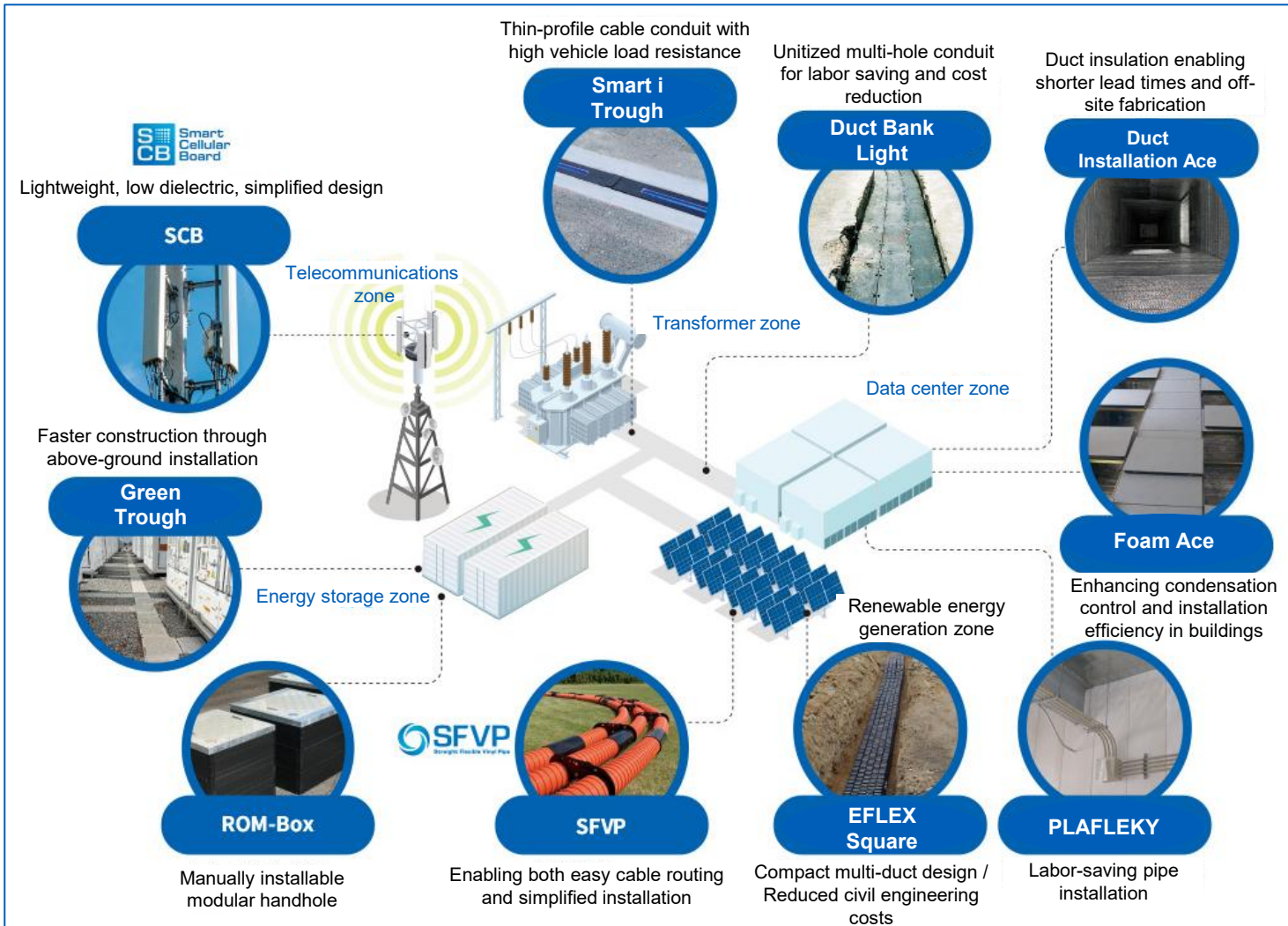
### BG tape for SDBG/GAL

- ✓ Reduce chip cracking during the stealth dicing process (SDBG/GAL)
- ✓ Achieve both excellent conformability and easy removability by controlling the adhesion properties
- ✓ Achieve world-class thickness accuracy through complex substrate film composition design

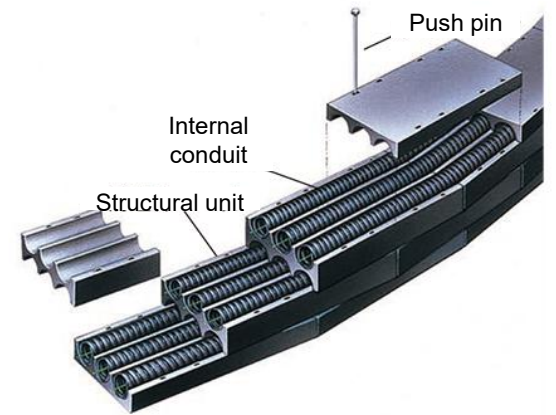


# Functional Plastics: Future Business Developments

## Contribute to shorter construction period for next-generation data center infrastructure

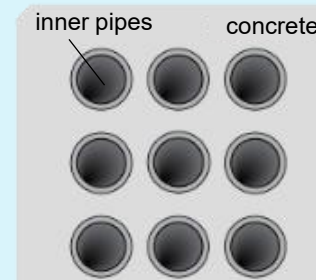


- Eliminates the concrete curing period required in conventional method through an assembly system of inner pipes and structural units
- Enables shorter construction lead time through excellent workability



**Reduces construction lead time by 54%\***  
compared to the concrete-encasement method

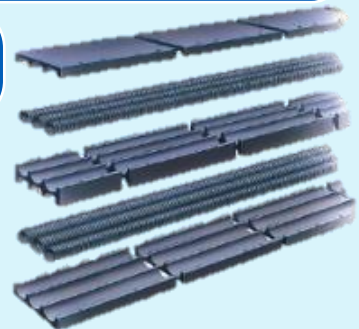
**Conventional**  
concrete-encasement method



**Duct Bank Light**

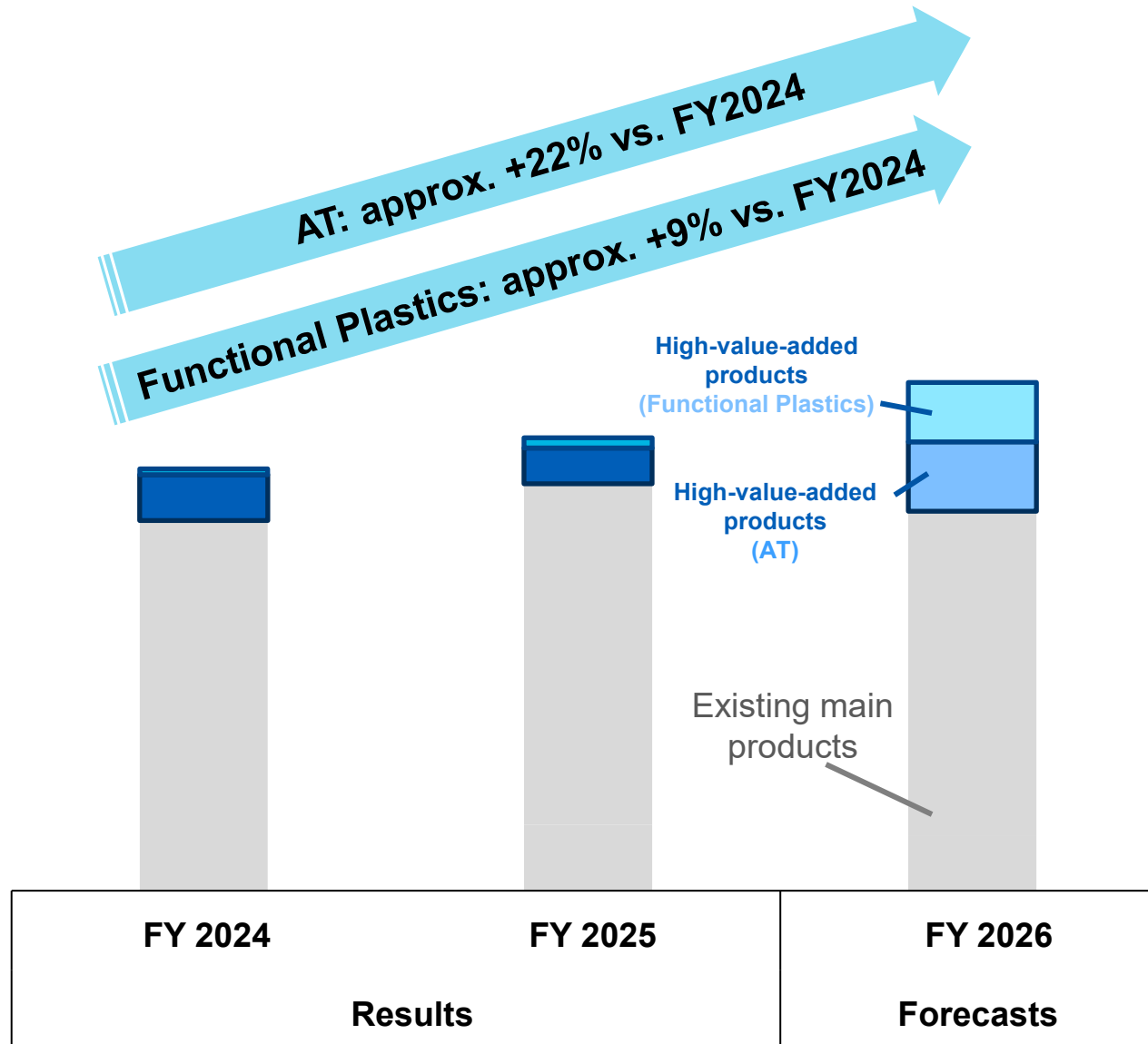
**Construction period**

**Reduces by 54%\***



\*Estimate by Furukawa Electric

# AT & Functional Plastics Division: Net Sales Trends



## Point

- AT focuses on expanding sales for advanced semiconductor processes, including HBM and GAL for AI
- Functional plastics focuses on expanding revenue from data centers and telecommunication base stations

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# Thermal Management Solution & Products Division

General Manager, Thermal Management Solution & Products Division

Kenya Kawabata



# Thermal Management Solution & Products: Future Business Developments

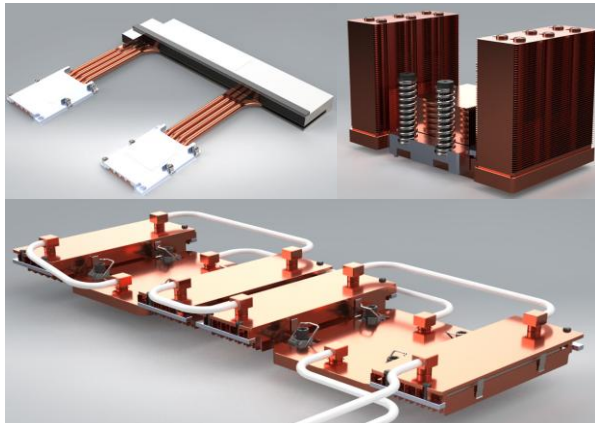
Launch and expand plants producing cooling and heat dissipation products for data centers

(Water-cooling: Hiratsuka, FTL, FFT / Air-cooling: FAZ, FTL)

Prepare a roadmap in line with customer requirements, and develop and provide high-performance, differentiated products



**Rising heat generation in AI semiconductors for data centers**



## Water cooling modules

Accelerate development and capacity expansion for liquid cooling solutions, which are being fully adopted from this fiscal year

- Optimize high-performance cold plates and flow channel design
- Support not only AI semiconductors, but also peripheral components such as optical transceivers, switches, and memory

## Air-cooling heat sinks

Continue development and capacity expansion for air-cooling solutions expected to remain in use

- Performance enhancement and process improvements for heat pipes and 3D vapor chambers
- Address heat sinks for data center semiconductor applications requiring high heat dissipation and high-density support

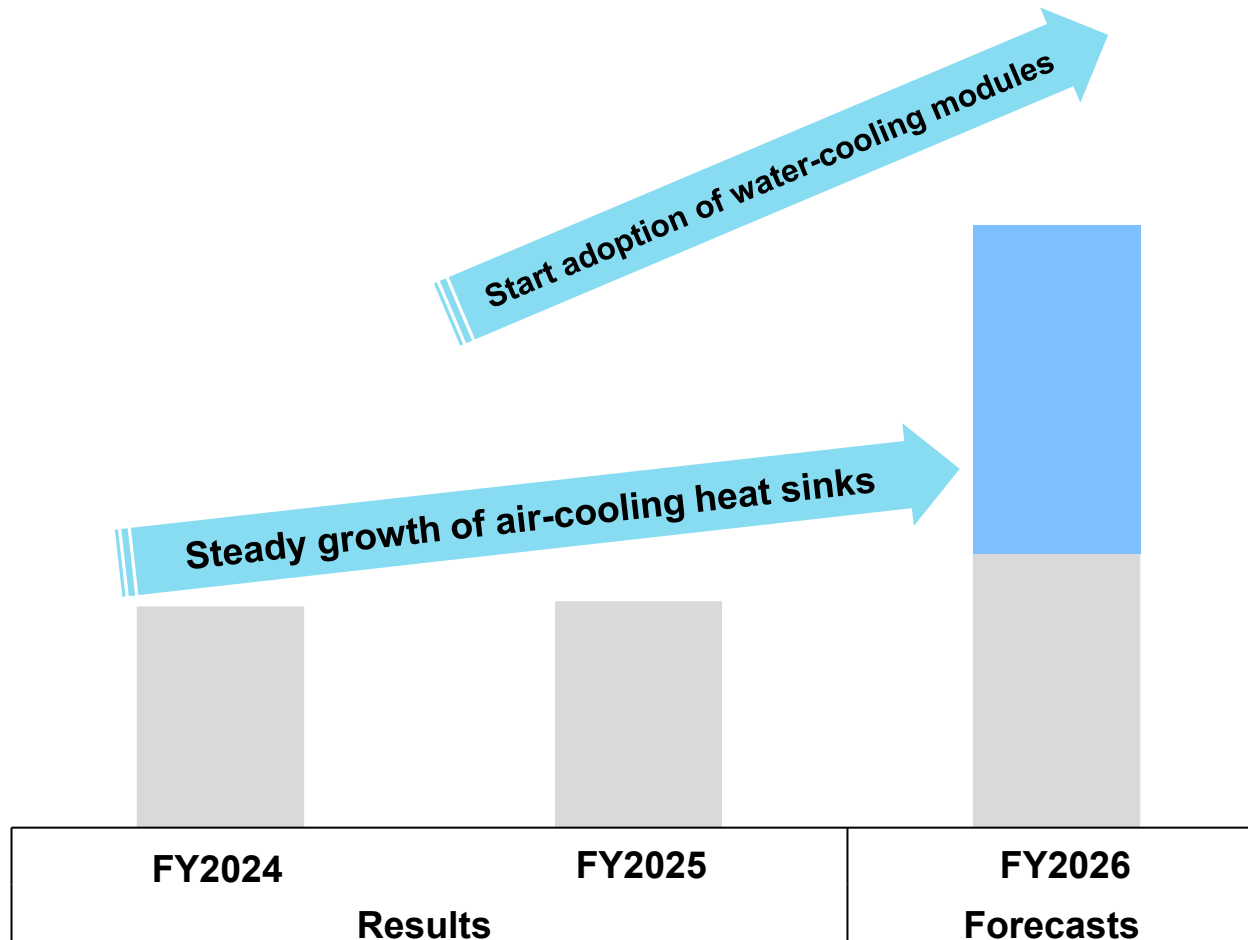
## Capabilities

- Decided to construct new plants and expand existing plants to support the growth of water-cooling projects, along with optimal production allocation
  - FAZ: Leverage the resources and supply chain in China
  - FTL: Launch a water-cooling plant, and expand existing plant
  - FFT: Establish a new plant with consideration for BCP
- Resolve customer challenges by rapidly proposing thermal performance and structural designs based on experience in air-cooling

## Sustainability

- Introduce 100% renewable electricity at all plants
- Support the stable operation of social infrastructure, and contribute to a sustainable society

# Thermal Management Solution & Products: Net Sales Trends



## Point

- FY2025: Achieve significant growth in air-cooling heat sinks for generative AI in the data center market
- From FY2026 onward: Start full-scale mass production of water-cooling modules and significantly expand sales
- Continue to provide differentiated products and services and work to drive earnings growth



# Investments for Growth Toward 2030: Thermal Management Solution & Products

Capture the rapid growth of the AI and data center market,  
and significantly contribute to sustainable growth

## Market Environment and Background

### Continued market growth

The data center cooling market is expected to continue growing, driven by the widespread adoption of generative AI.

### Increased heat generation

- Increased heat generation from CPUs and GPUs due to advancement of generative AI
- From several hundred watts to several thousand watts

### Expansion of cooling targets

In addition to ongoing air-cooling solutions, cooling targets are expanding from AI semiconductors to peripheral components including optical transceivers, switches and memory.

## Investment / Business Targets

### Total Investment\*<sup>1</sup>

**JPY 78.0  
billion**

### Profits Growth

(FY2030 target / vs. FY2025)

**15 times**

\*1 Total investments in capacity expansion from FY2024 onward

## Expansion of the Global Production Network

### 1) Water-cooling modules\*<sup>2</sup>

Locations: FTL, FFT (new establishment)  
Driven by an increase in customers, cooling targets, and planned volumes, further expand its water-cooling plant at FTL  
Construct a new plant in Thailand from a BCP perspective

\*<sup>2</sup> Mass production is scheduled to start in June 2026 (FTL) and January 2028 (FFT).

### 2) Air-cooling heat sinks\*<sup>3</sup>

Locations: FTL, FAZ  
Driven by increase of air-cooling projects such as CPU, GPU, switches, network cards, etc., increase the capacity of the air-cooling plants at FTL and FAZ

\*<sup>3</sup> Mass production is scheduled to start in **July 2026**.

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# Memory Disk Division

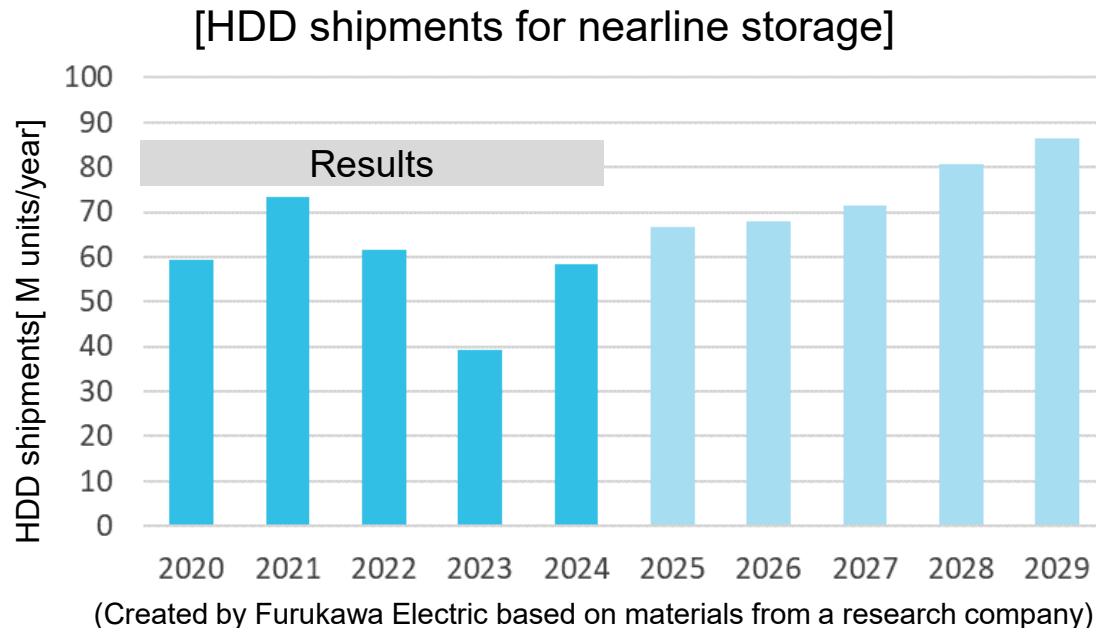
General Manager, Memory Disk Division

Takashi Mori

# Memory Disk Division: Future Business Developments

As global data volume continues to increase, the number of disks per HDD is expected to rise further, requiring thinner substrates

**Continue to meet customer demand for thinner substrates with differentiated materials**



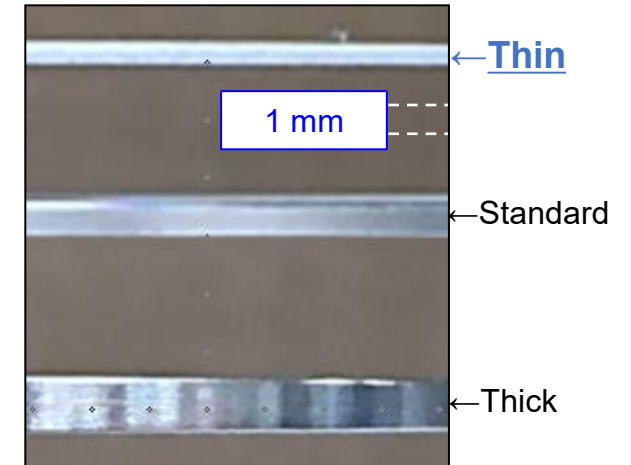
[Internal view of a new HDD]



The number of disks per HDD continues to increase: while the maximum was 8 disks in 2017, but in 2024, products with **11 disks** were launched.

\*Image shows an HDD with 10 disks.

[Comparison of blank thickness]



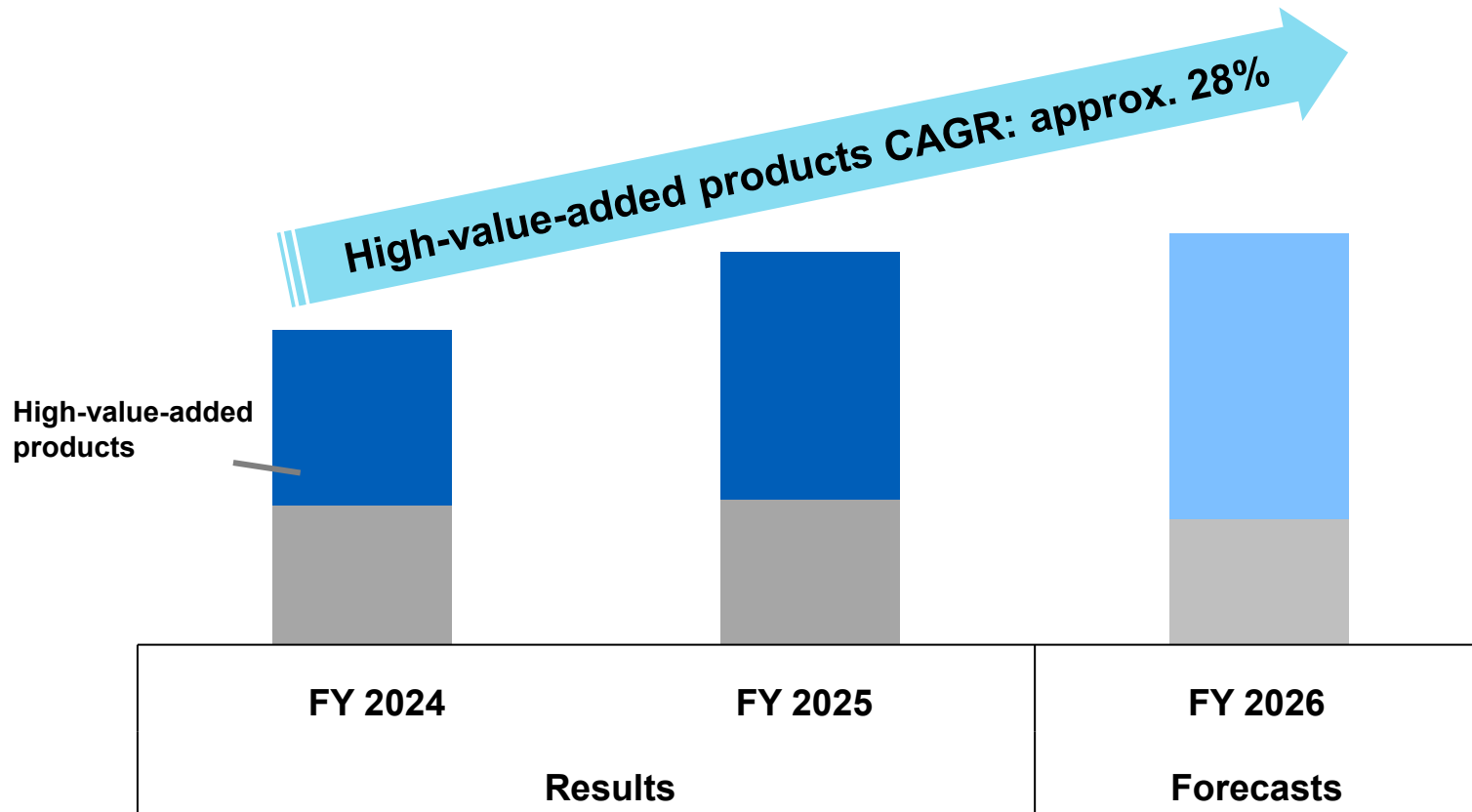
Thin substrates are less than around 1 mm thick.

\*All photos show materials produced by Furukawa Electric.

# Memory Disk Division: Net Sales Trends

Driven by growing AI demand, sales entered a full-fledged recovery in FY2025. Strong demand is expected to continue for the time being, although sales are projected to remain at a somewhat elevated level due to the strategies of HDD manufacturers.\*

\* Major HDD manufacturers are addressing growing capacity demand not by increasing the number of HDD units, but **by increasing storage capacity per drive through advanced technologies.**



## Point

- Growing expectations for technological innovation to increase storage capacity per drive are driving demand for even thinner substrates and higher quality.
- We will continue to meet customer needs by launching differentiated new materials.

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# Copper Foil Division

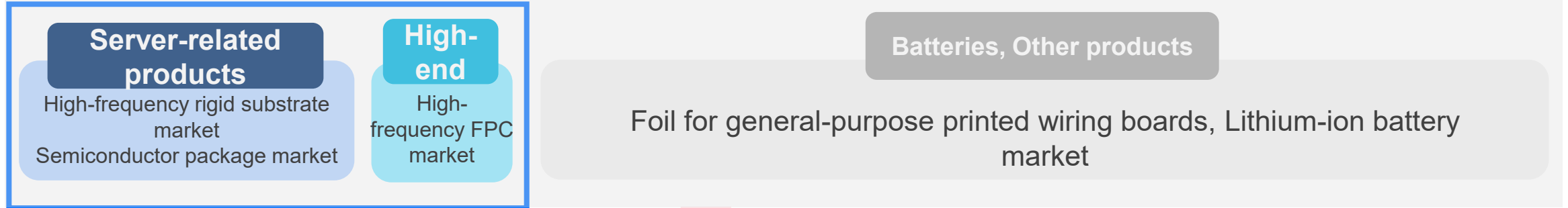
General Manager, Copper Foil Division

Takashi Saito

# Copper Foil: Future Business Developments

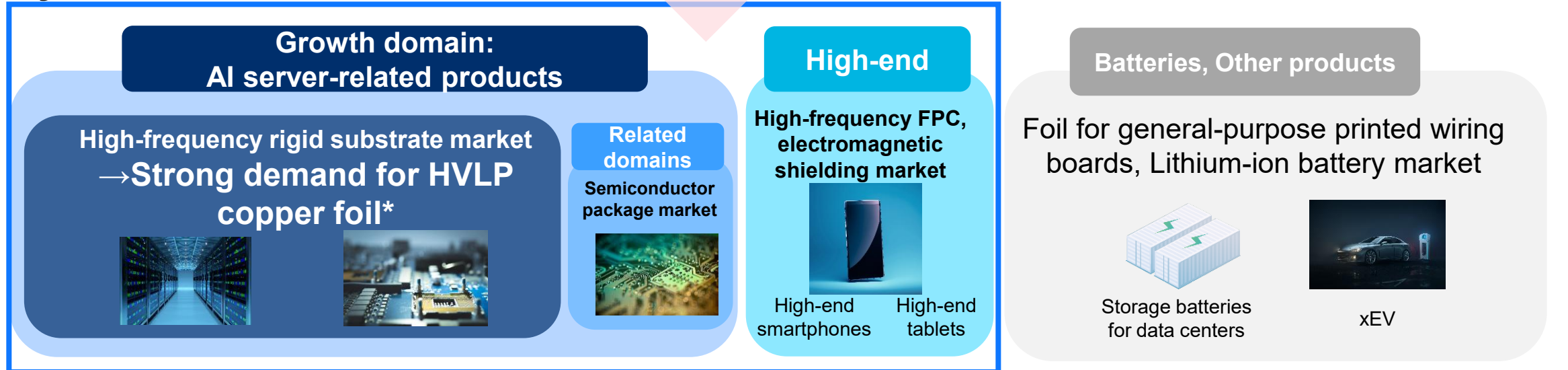
In line with market changes, focus on products for AI servers by shifting the product portfolio, and achieve business growth through an increase in high-value-added products

Past



Shift the product portfolio in response to market changes

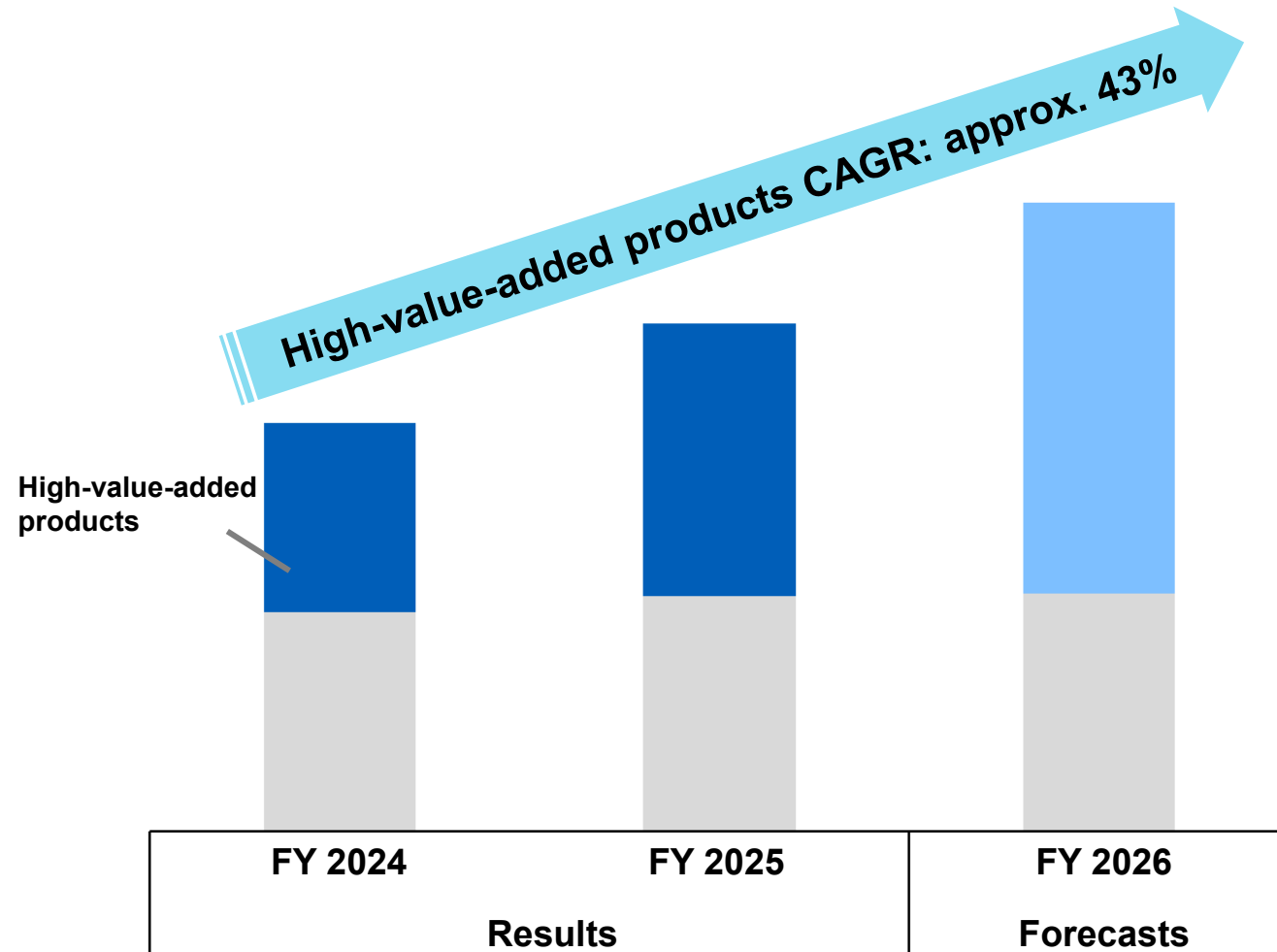
Today



\*HVLP: Hyper Very Low Profile. Copper foil with extremely low surface roughness that is mainly used in high-frequency circuit boards.

# Copper Foil: Net Sales Trends

As a result of increased AI server demand from 2023, HVLP copper foil has grown, and the increased sales ratio of high-value-added products has led to higher profits



## Point

The following are the major high-value-added products, with a particular focus on expanding sales of HVLP copper foil.

### HVLP Copper Foil

- Driven by the growth of generative AI, the demand has rapidly increased from FY2023
- Capture growing demand for HVLP4-class copper foil with FOX-WS foil as a core product, support the global AI server substrate market, and achieve growth



### High-Frequency FPC Copper Foil for Electromagnetic Shielding Applications

- Adopted in high-end smartphones, capturing the trend toward higher performance



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# **FITEL Products Division**

General Manager, FITEL Products Division

Takeshi Ogamino



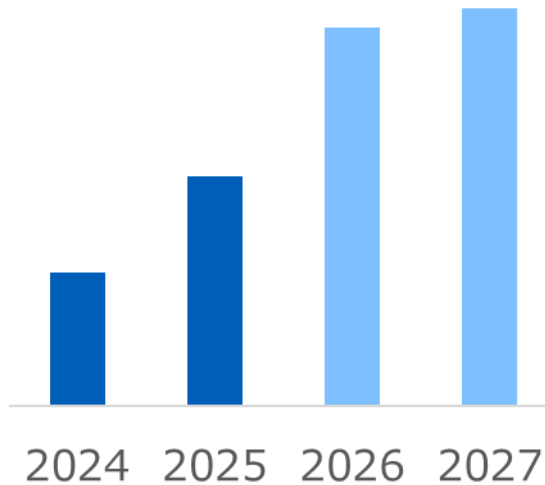
# FITEL Products: Future Business Developments

Growth driven by technological capabilities and supply capacity amid expanding data center demand

## Market trends

- Demand is increasing for products used within data centers
- Demand is increasing for products used between data centers
- \* Securing supply capacity is a prerequisite for growth amid expanding demand

Forecast of the data center optical components market



\*1 ELS: External Light Source

\*2 CPO: Co-Packaged Optics

\*3 SOA: Semiconductor Optical Amplifier

Created by Furukawa Electric based on  
Signal AI and other sources

## Intra-Data Center Solutions

### ■ DFB laser chips, ELS\*1

- Increase in demand for light sources as data center speeds increase (400G/800G)

### ■ Increase manufacturing capacity

- Secure supply capacity in order to capture the rapidly growing demand

### ■ Develop and expand sales of high-output DFB/ELS products for 800G/1.6T

- Expand adoption in next-generation architecture for CPO\*2

## Data Center Interconnect (DCI) Solutions

### ■ Pump light sources for SOA\*3 and Raman amplifiers

- Increase in demand for amplification light sources between data centers

### ■ Increase manufacturing capacity

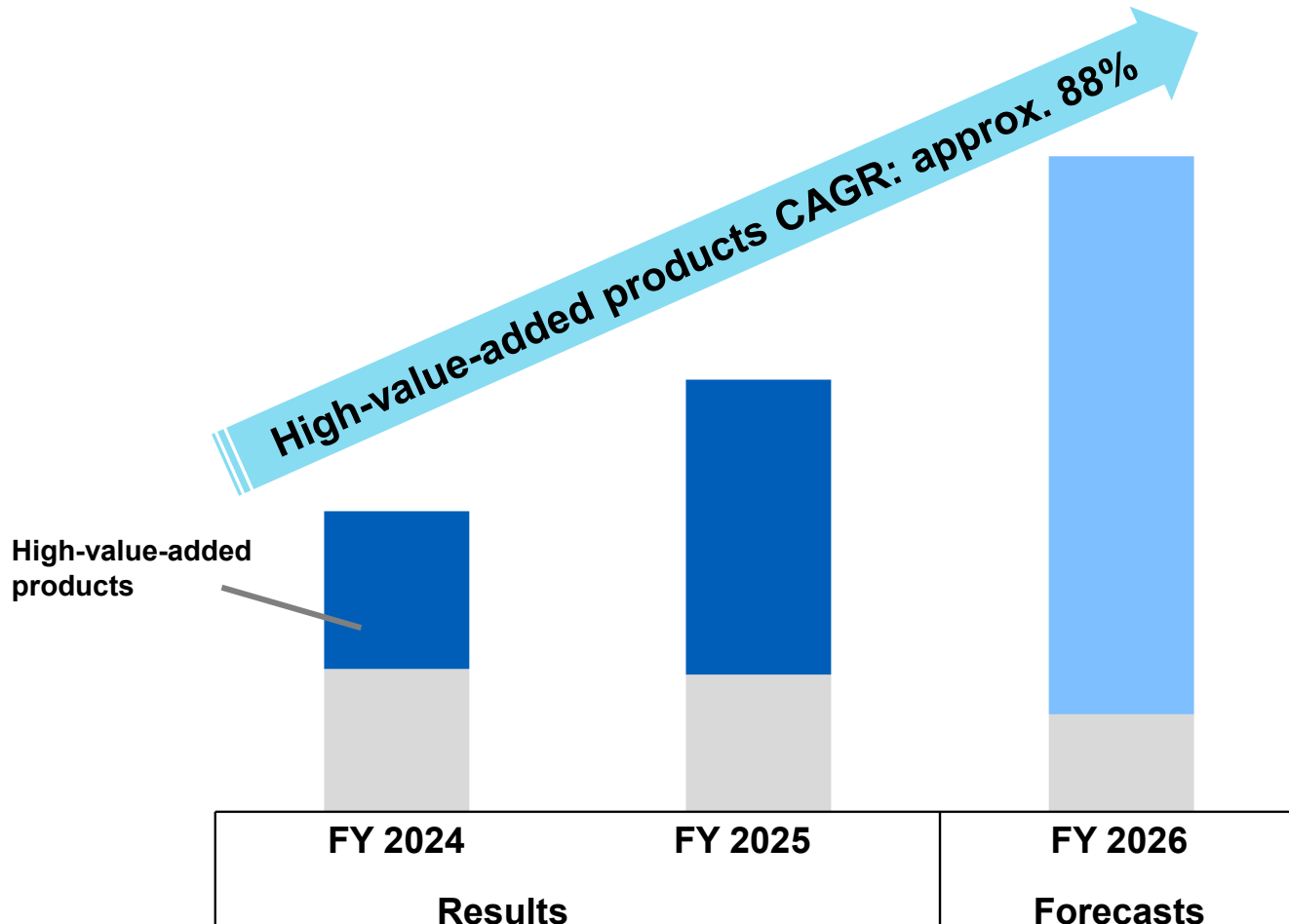
- Secure a stable supply structure for high-value-added products

### ■ Develop and expand sales of high-output, high-reliability products

- Continue expansion of adoption in high-performance applications

# FITEL Products: Net Sales Trends

In addition to demand for DFB laser chips used inside data centers, capture demand for pump light sources for Raman amplifiers and SOAs used between data centers and expand sales of high-value-added products.



## Point

- Increase in demand for DFB laser chips used inside data centers
- Expanded adoption of SOAs and pump light sources for Raman amplifiers used between data centers
- Strengthen the semiconductor laser production structure through growth investments

# Investments for Growth Toward 2030: FTEL Products

**Achieve sales growth by expanding supply capacity to capture rapidly growing demand**

## Market Environment and Background

### Rapid Market Growth

- Rapid increase in data center traffic following the increasingly widespread use of generative AI and cloud services

### Ultra high-speed communications

- Network transmission speeds are increasing from 400Gbps to 800Gbps/1.6Tbps

### Advances in the next-generation technology “CPO”

- Expect accelerated introduction of the next-generation network switch technology, CPO (Co-Packaged Optics) that enables extended bandwidth and energy savings
- Rapidly growing demand for high-output DFB laser chips as an external light source

## Investment / Business Targets

### Total Investment\*

**JPY 38.0 billion**

### Profits Growth

(FY2030 target / vs. FY2025)

**10 times**

\*Investment for capacity expansion announced in December 2025

## Expand the Global Production Network

### 1) Front-end processes (wafer process)

Location: FFOD Iwate plant (new)

- To be newly established within Japan Semiconductor Iwate Operations
- In cooperation with Japan Semiconductor, which possesses the semiconductor manufacturing experience of the Toshiba Group, establish a highly efficient, stable supply system (Mass production scheduled to start in **April 2028**)

### 2) Back-end processes (Chip processes such as inspection)

Locations: Thailand plant (Expand facilities)

- Install dedicated facilities at the Furukawa FTEL (Thailand) No. 2 Plant
- Establish a supply chain to reliably capture rapidly increasing demand (Completed in **February 2026**)

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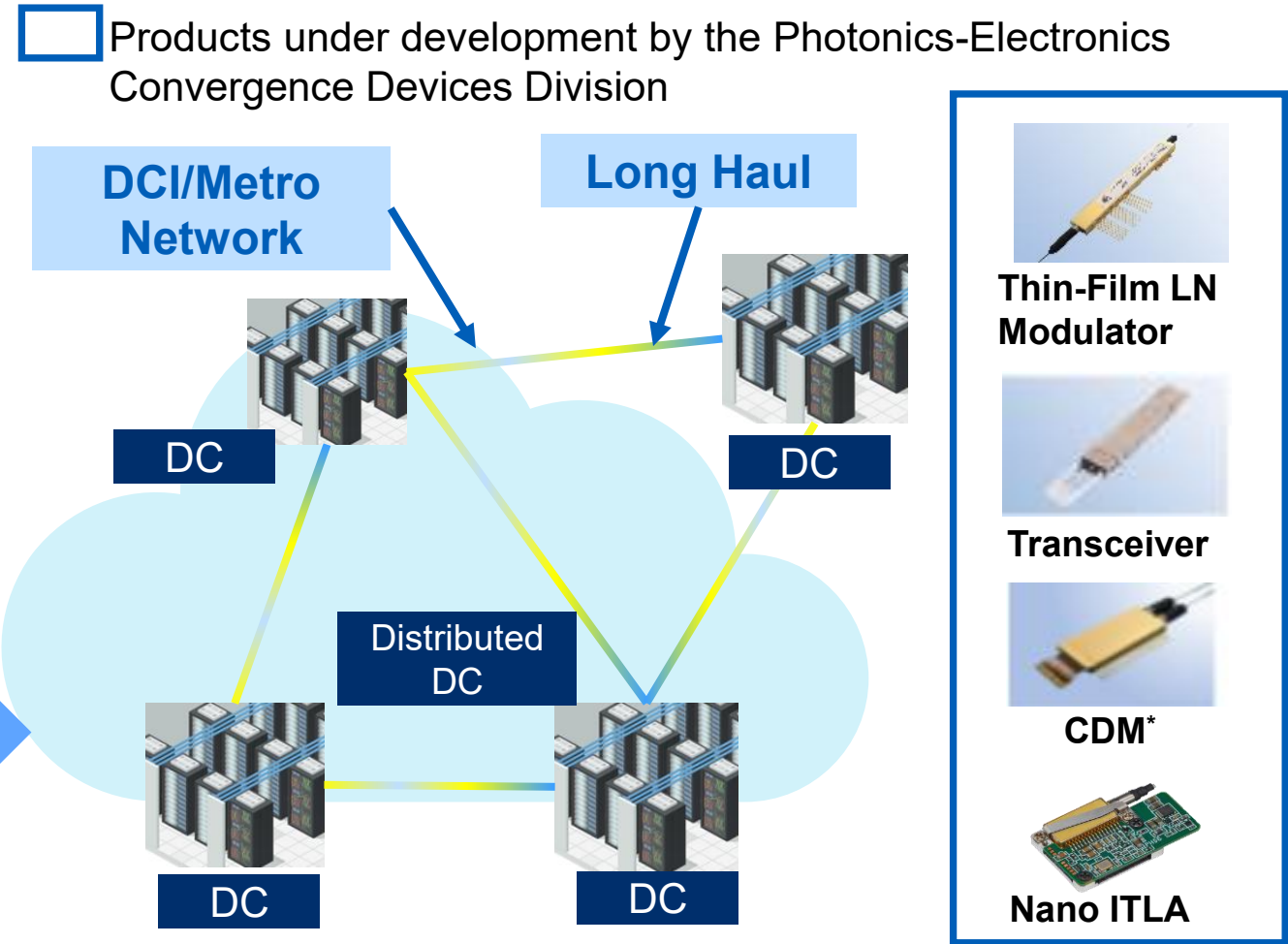
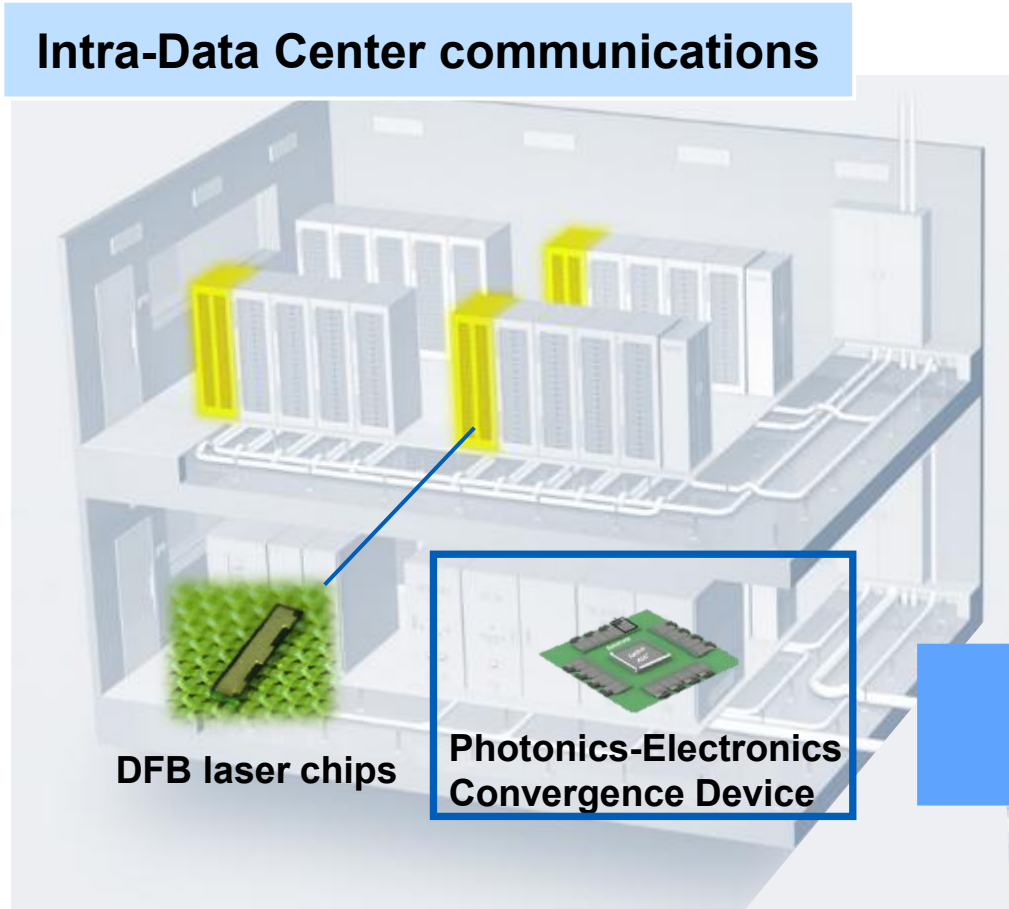
# Photonics-Electronics Convergence Devices Division

General Manager, Photonics-Electronics Convergence Devices Division

Keishi Takaki

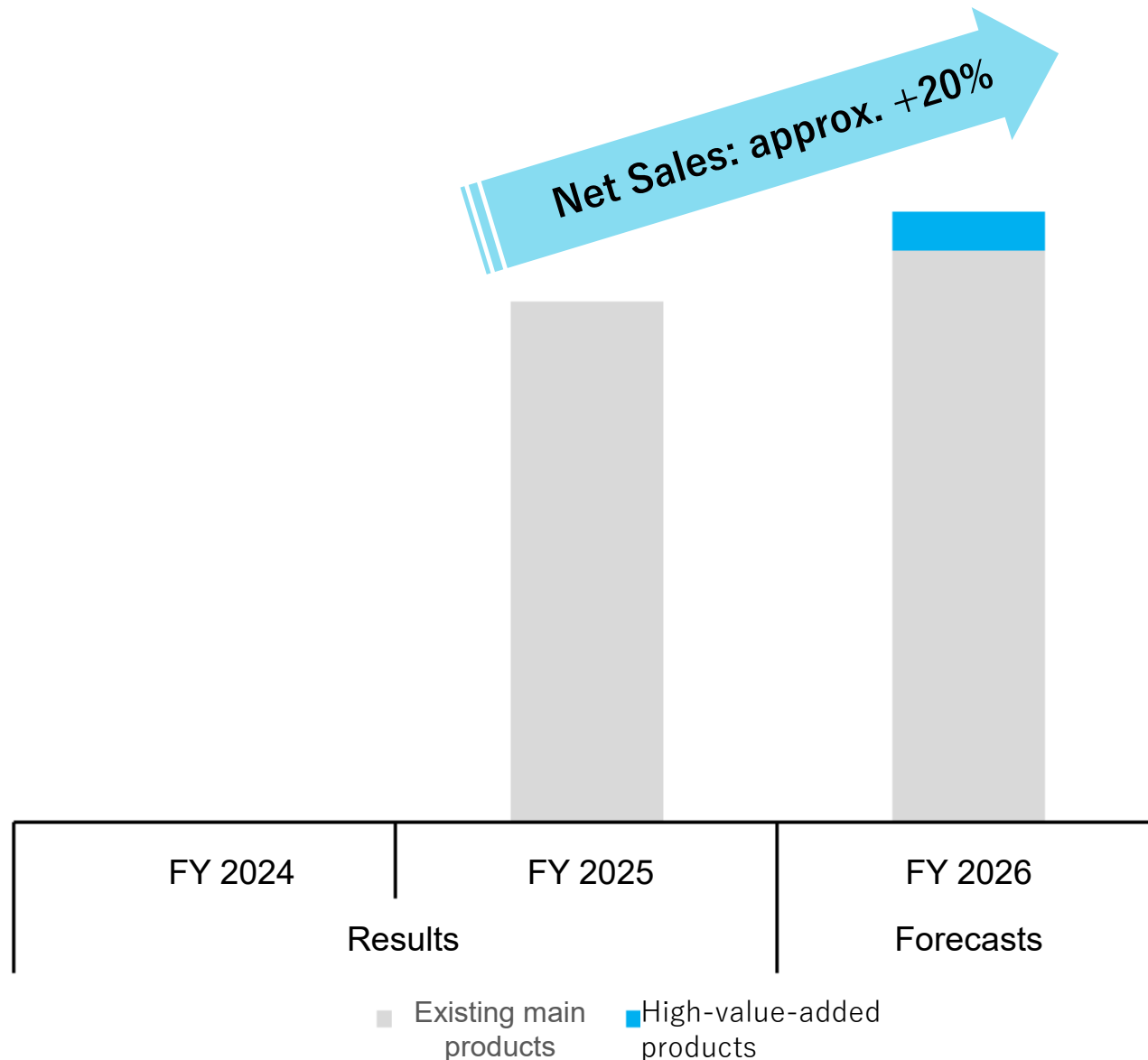
# Photonics-Electronics Convergence Devices: Future Business Developments

Add high-performance products such as modulators and transceivers to the product portfolio and contribute to improved communications performance in the data center market



\* CDM: Coherent Driver Modulator

# Photonics-Electronics Convergence Devices: Net Sales Trends



## Point

- Steadily generate profits from existing main products, supported by continued solid data center demand
- Toward 2030, develop and expand sales of high-performance products such as thin-film LN modulators and 1.6T transceivers, while aiming to commercialize next-generation photonics-electronics convergence devices

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ELECTRIC

# Thank You

FURUKAWA ELECTRIC GROUP PURPOSE

**Composing the core  
of a brighter world.**



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# Appendix

- Business Overview
- Product Overview
- Net Sales and Operating Profit Trends



# Appendix - Business Overview

## Analysis of the business environment

### Business environment (Key profit opportunities)

- Increased global data traffic
- Solving social issues such as carbon neutrality
- Increasingly widespread adoption of AI technology, and growth of data centers

### Strengths

- differentiated, strong technological capabilities and patents
- Rapid, thorough customer service that combines engineering and sales

### Business environment (Key risks and threats)

- Supply chain instability due to geopolitical risks
- Soaring personnel expenses due to inflation, as well as higher energy costs, raw material costs and transportation costs

### Issues

- Sustain and enhance the design and development capabilities that continuously create differentiated technology
- Further promote initiatives directed at further advancement of BCP through site optimization and reduce environmental impact, including carbon neutrality

## Business strategy toward Vision 2030

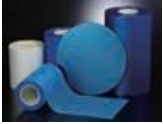
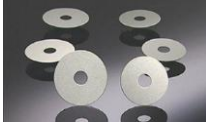
### Basic strategies

- Continue the proposal activities for high-performance, differentiated products, and achieve growth by acquiring new markets and customers
- Build a structure that enables rapid response to changes in the data center market

### Key Initiatives

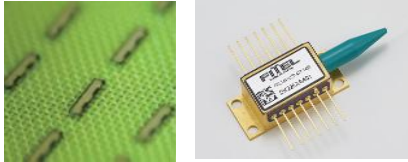
- AT & Functional Plastics: Focus on high-value-added products for advanced processes, including AI semiconductors. Contribute to shorter construction period for next-generation data center infrastructure.
- Thermal Management Solution & Products: Launch and expand plants producing cooling and heat dissipation products for data centers. Prepare a roadmap in line with customer requirements, and develop and provide high-performance, differentiated products
- Memory Disk: achieve differentiated materials for the thinner substrates required to increase the number of blanks in each HDD unit
- Copper Foil: Supply high-quality electrolytic copper foil in the global market centered on the data center market, including AI servers
- FITEL Products: Expand the global production network, and supply high-value-added products to the data center market
- Photonics-Electronics Convergence Devices: Contribute to increased communications performance in the data center market through high-performance products such as modulators and transceivers

# Appendix - Product Overview

|                                                    | AT* & Functional Plastics Division                                                                                                 |                                                                                                                                                                                                                                                              | Thermal Management Solution & Products                                                                                                                                                                                             | Memory Disk                                                                                           | Copper Foil                                                                                                                                                                                                                                                        |
|----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Product images                                     |                                                   |                                                                                                                                                                            |                                                                                                                                                 |                    |                                                                                                                                                                                 |
| Data centers                                       | ●                                                                                                                                  | ●                                                                                                                                                                                                                                                            | ●                                                                                                                                                                                                                                  | ●                                                                                                     | ●                                                                                                                                                                                                                                                                  |
| Carbon neutrality                                  |                                                                                                                                    |                                                                                                                                                                                                                                                              | ●                                                                                                                                                                                                                                  |                                                                                                       |                                                                                                                                                                                                                                                                    |
| Strengthening infrastructure                       | ●                                                                                                                                  | ●                                                                                                                                                                                                                                                            | ●                                                                                                                                                                                                                                  |                                                                                                       | ●                                                                                                                                                                                                                                                                  |
| Mobility<br>(Autonomous driving / electrification) |                                                                                                                                    | ●                                                                                                                                                                                                                                                            | ●                                                                                                                                                                                                                                  |                                                                                                       | ●                                                                                                                                                                                                                                                                  |
| Main products                                      | <ul style="list-style-type: none"> <li>● Tape for semiconductor process</li> </ul>                                                 | <ul style="list-style-type: none"> <li>● Protective conduits for cables</li> <li>● Troughs made from recycled materials</li> <li>● Insulation materials</li> <li>● High-performance foam</li> </ul>                                                          | <ul style="list-style-type: none"> <li>● High-performance heat sinks, heat pipes, 3D vapor chambers, water-cooling modules, and other thermal dissipation products</li> </ul>                                                      | <ul style="list-style-type: none"> <li>● Aluminum blanks for HDD</li> </ul>                           | <ul style="list-style-type: none"> <li>● Electrolytic copper foil for printed circuit boards</li> <li>● Electrolytic copper foil for lithium-ion battery anodes</li> </ul>                                                                                         |
| Main applications                                  | <ul style="list-style-type: none"> <li>● Surface protection, immobilization, etc. during semiconductor wafer processing</li> </ul> | <ul style="list-style-type: none"> <li>● Protective conduits for underground cables</li> <li>● Troughs for holding cables</li> <li>● Insulation for air conditioning ducts</li> <li>● Circuit boards for base stations</li> </ul>                            | <ul style="list-style-type: none"> <li>● Cooling for CPUs and GPUs used in data center servers</li> <li>● Cooling for optical components, switches, DIMMs, VRMs, and other peripheral components in data center servers</li> </ul> | <ul style="list-style-type: none"> <li>● HDDs for data centers, surveillance cameras, etc.</li> </ul> | <ul style="list-style-type: none"> <li>● Printed circuit boards for electronic devices including smartphones, PCs and high-end servers such as AI servers and telecommunications servers</li> <li>● Anodes (current collector) in lithium-ion batteries</li> </ul> |
| Main customers                                     | <ul style="list-style-type: none"> <li>● Semiconductor manufacturers</li> <li>● Foundries</li> </ul>                               | <ul style="list-style-type: none"> <li>● General construction companies and subcontractors</li> <li>● Railroad companies, public highway companies, and road subcontractors</li> <li>● Air conditioning duct manufacturers</li> <li>● RAN vendors</li> </ul> | <ul style="list-style-type: none"> <li>● Hyperscale data centers</li> <li>● Generative AI chip and optical module manufacturers</li> </ul>                                                                                         | <ul style="list-style-type: none"> <li>● HDD substrate manufacturers</li> </ul>                       | <ul style="list-style-type: none"> <li>● Printed circuit board material manufacturers</li> <li>● Lithium-ion battery manufacturers</li> </ul>                                                                                                                      |

\*AT: Advanced Technology Tape

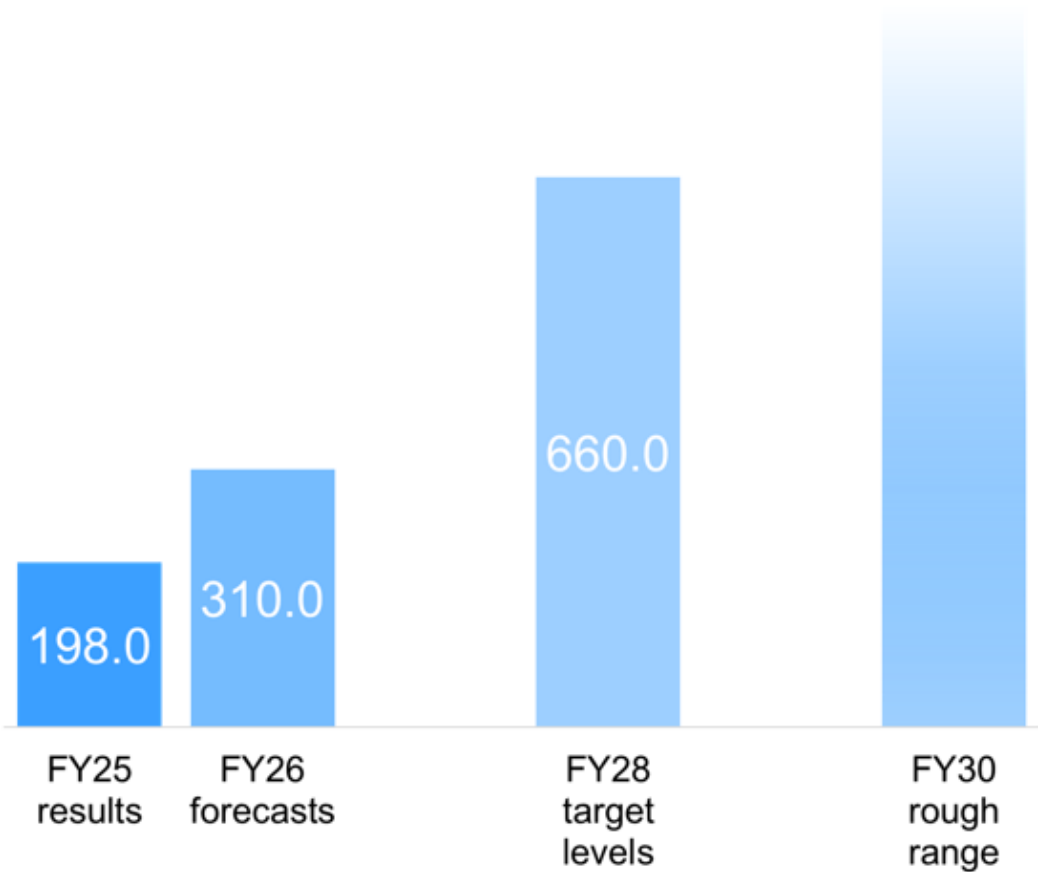
# Appendix - Product Overview

|                                                    | FITEL Products                                                                                                                                                                                                  | Photonics-Electronics Convergence Devices                                                                                                                               |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Product images                                     |                                                                                                                                |                                                                                       |
| Data centers                                       | ●                                                                                                                                                                                                               | ●                                                                                                                                                                       |
| Carbon neutrality                                  | ●                                                                                                                                                                                                               | ●                                                                                                                                                                       |
| Strengthening infrastructure                       | ●                                                                                                                                                                                                               | ●                                                                                                                                                                       |
| Mobility<br>(Autonomous driving / electrification) |                                                                                                                                                                                                                 |                                                                                                                                                                         |
| Main products                                      | <ul style="list-style-type: none"> <li>● DFB laser chips</li> <li>● Wavelength-tunable laser module</li> <li>● Pump light source module</li> </ul>                                                              | <ul style="list-style-type: none"> <li>● Optical transmission device</li> <li>● Optical transceiver module</li> <li>● Optical modulator</li> </ul>                      |
| Main applications                                  | <ul style="list-style-type: none"> <li>● High-capacity communications for data centers</li> <li>● Digital coherent signal light source</li> <li>● pump light source for optical signal amplification</li> </ul> | <ul style="list-style-type: none"> <li>● High-speed communications for telecommunications companies</li> <li>● High-capacity communications for data centers</li> </ul> |
| Main customers                                     | <ul style="list-style-type: none"> <li>● System vendors</li> <li>● Transmission device manufacturers</li> </ul>                                                                                                 | <ul style="list-style-type: none"> <li>● Telecommunications providers</li> <li>● System vendors</li> <li>● Transmission device manufacturers</li> </ul>                 |

# Appendix - Net Sales and Operating Profit Trends

## Net sales

(JPY billion)



## Operating profit

(JPY billion)

