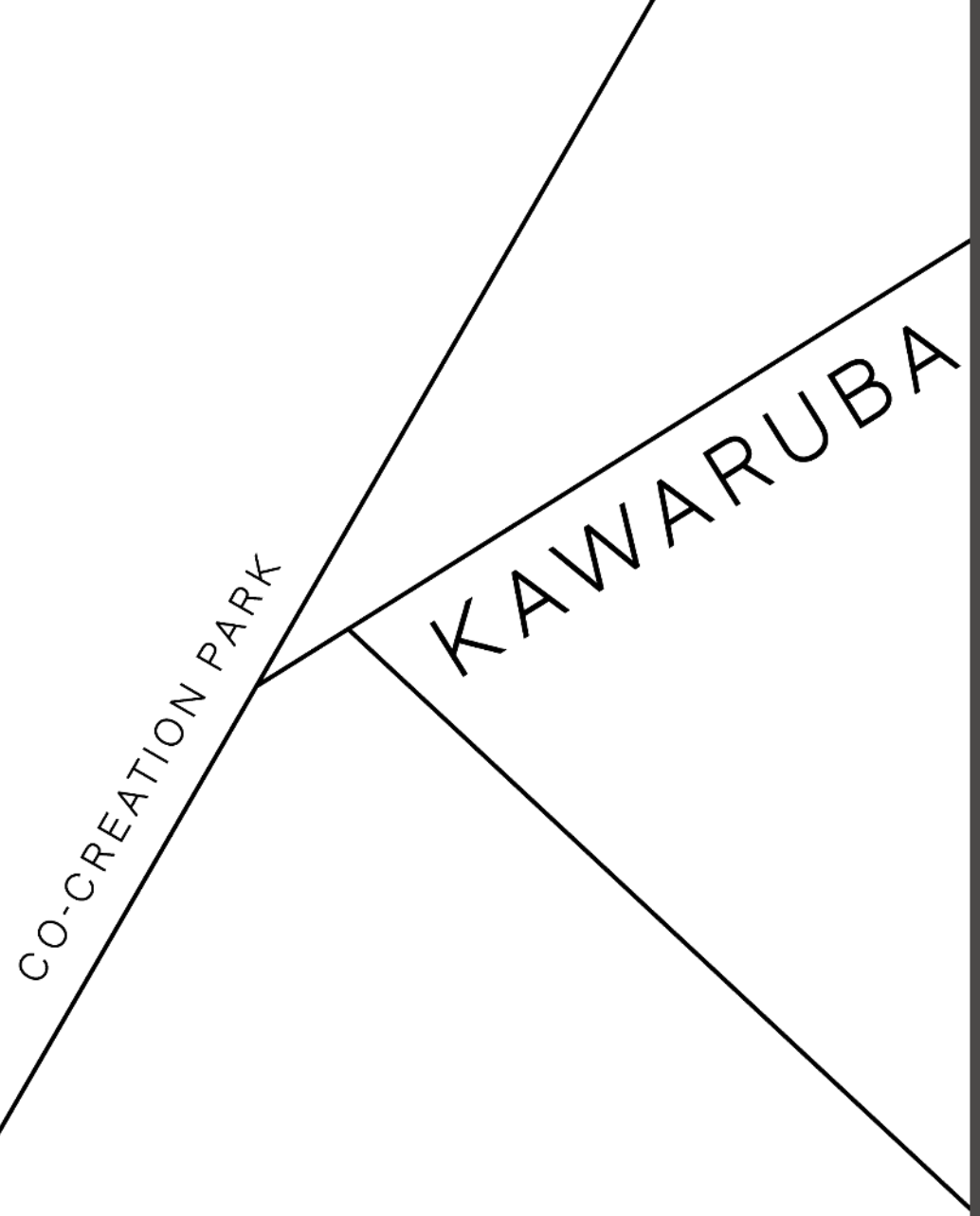


① Company-wide Investment Priorities

② Defense

③ Energy

A Safe and Secure Remotely-Connected Society

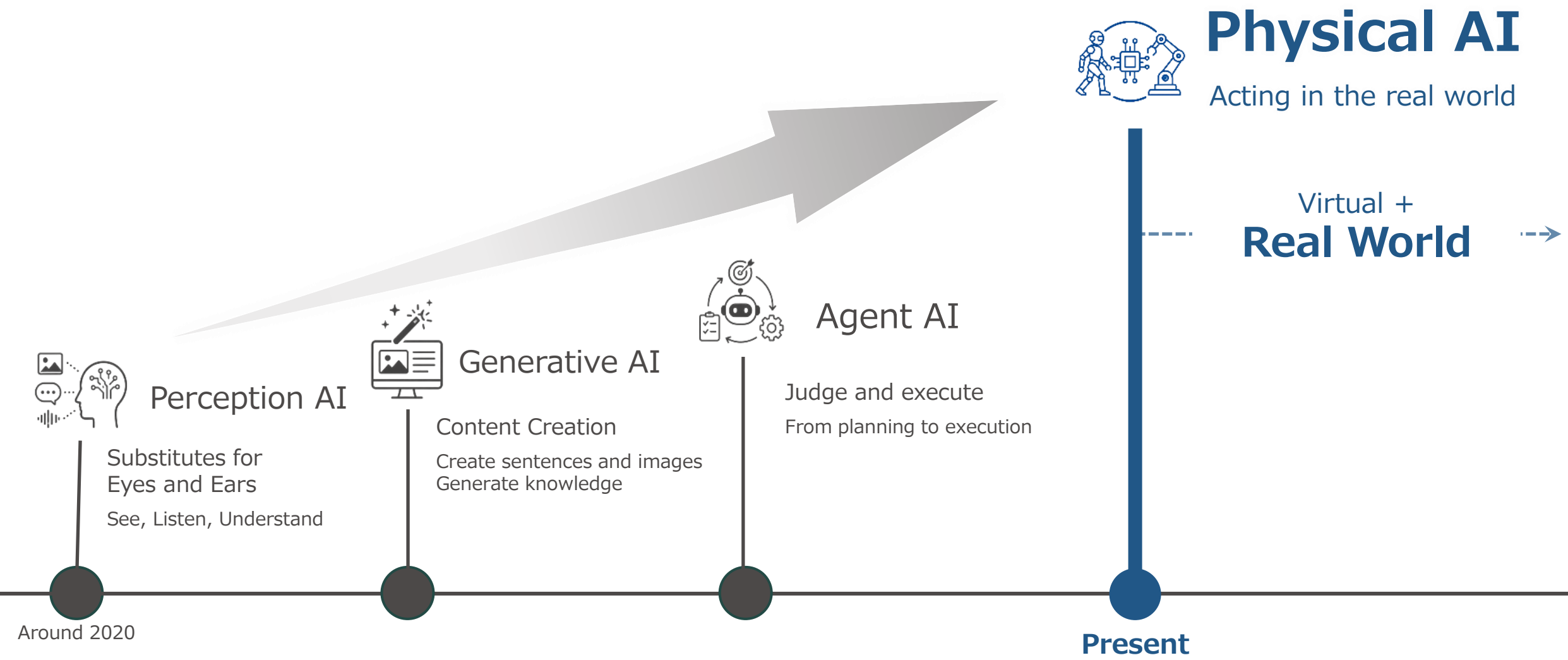
Advanced Smart Mobility

Energy & Environmental Solutions

④ Physical AI

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AI is evolving, and Physical AI is emerging

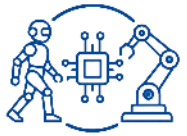


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AI is evolving, and Physical AI is emerging

Expected as a tool for the solution of various social issues in the field

AI continues to advance at an accelerating pace



Physical AI

Acting in the real world

Virtual +
Real World

Present

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Semiconductors and power generation are the keys
to accelerate the development of physical AI

Kawasaki
Powering your potential

Physical AI implementation into society

Manufacturing & Logistics

Mobility

Medical & Senior Care

Agriculture & Environment

Retail & Services

Construction & Infrastructure

Family & Life

supply

communication

Semiconductor

Computing resources essential for physical AI

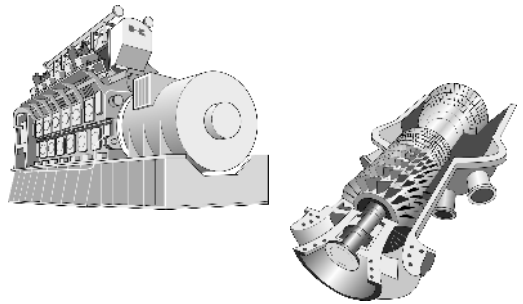
supply

Data centers



supply

Power generation

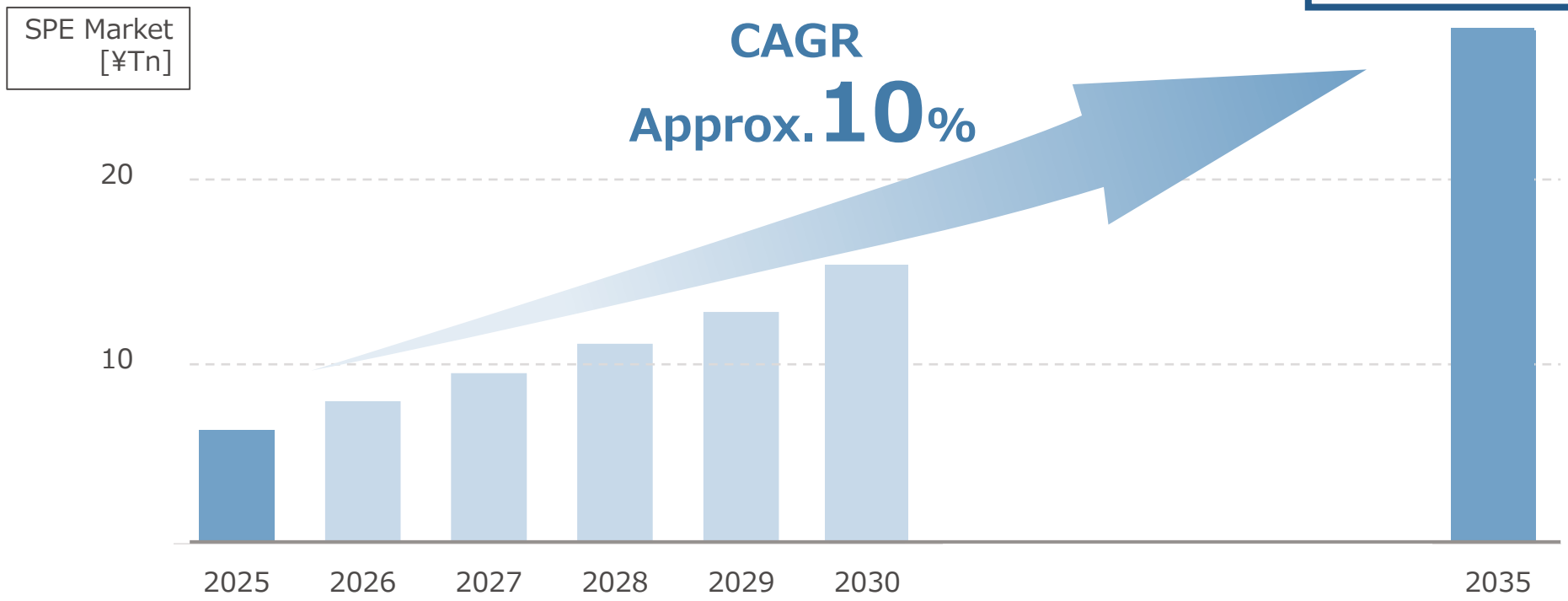


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SPE Market Situation

- Semiconductor Production Equipment market is expected to grow at **approx. 10% per year** from 2026 onward

CAGR of our major clients
Approx. **14**%



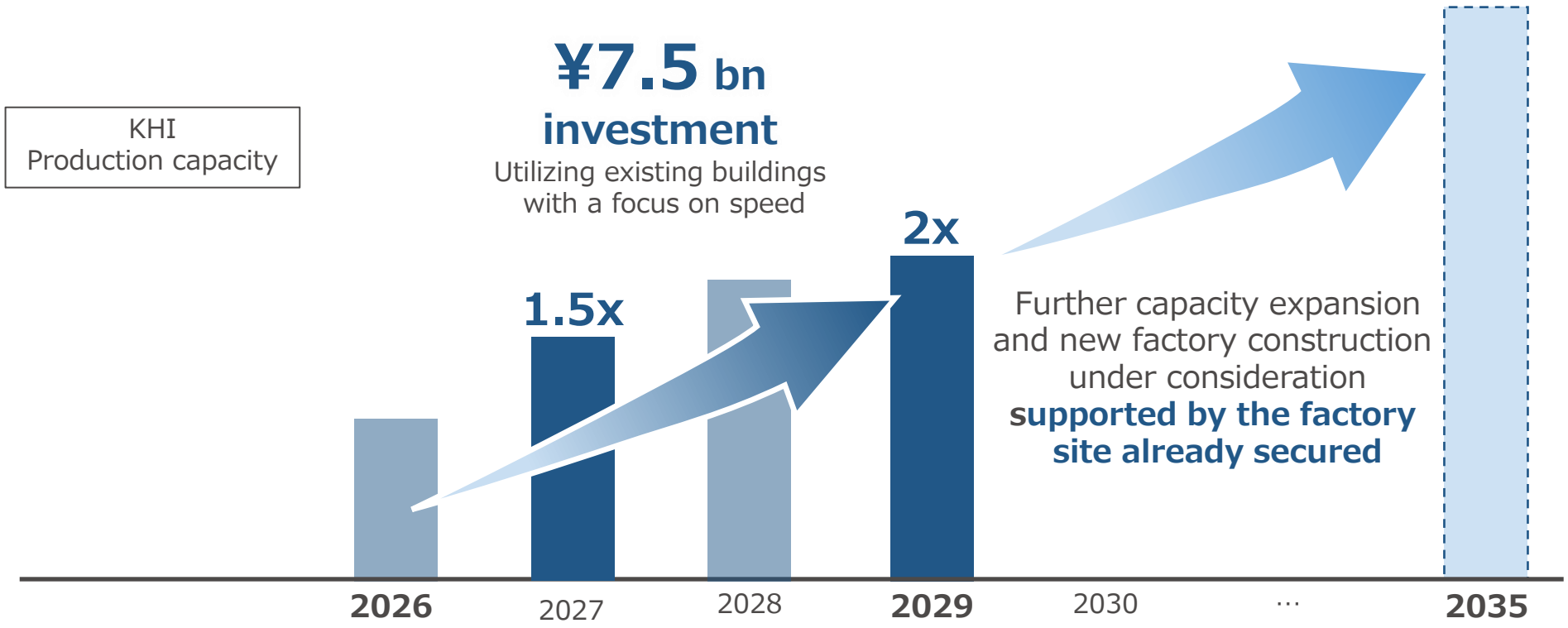
*CAGR: Compound annual growth rate

Source: Global Semiconductor Manufacturing Equipment & Test/Inspection Equipment Market Annual 2026 (Compiled by GlobalNet Inc.)

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Investment in the semiconductor business

- **Investing 7.5 billion yen** in the semiconductor robot business, where demand is expected to increase
- **Doubling capacity** by FY2029, building a production system that flexibly responds to demand trends



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Further Growth Through Mass Production of Semiconductor Robots

- Further expand our presence in **back-end processes**, **vacuum processes**, and **system products**, while **increasing our share in the high-demand atmospheric process** market to drive steady profit growth

System products

Laun-ched



Reliably meet customer needs

Vacuum processes



Laun-ched



Robots operating in
Atmospheric process,
where the demand remain strong

Back-end processes



Laun-ched

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Challenges Facing the Semiconductor Industry

- While the semiconductor industry is expected to grow, the **“Labor shortage"** remains a major challenge

Domestic
40,000 people
shortage



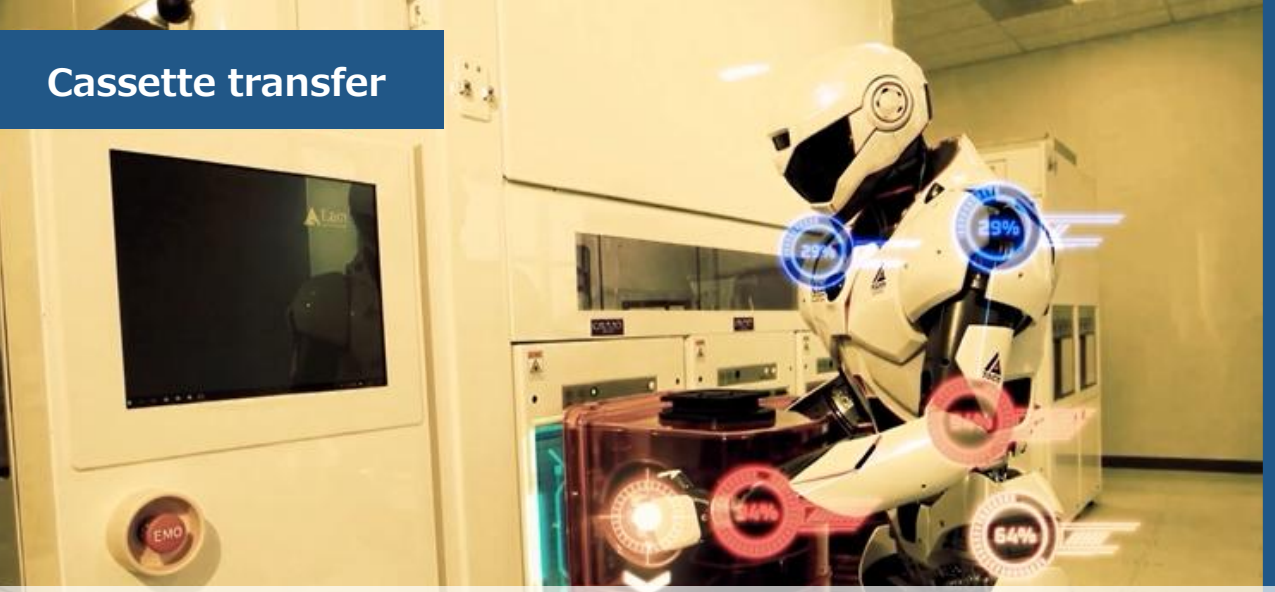
From production equipment automation

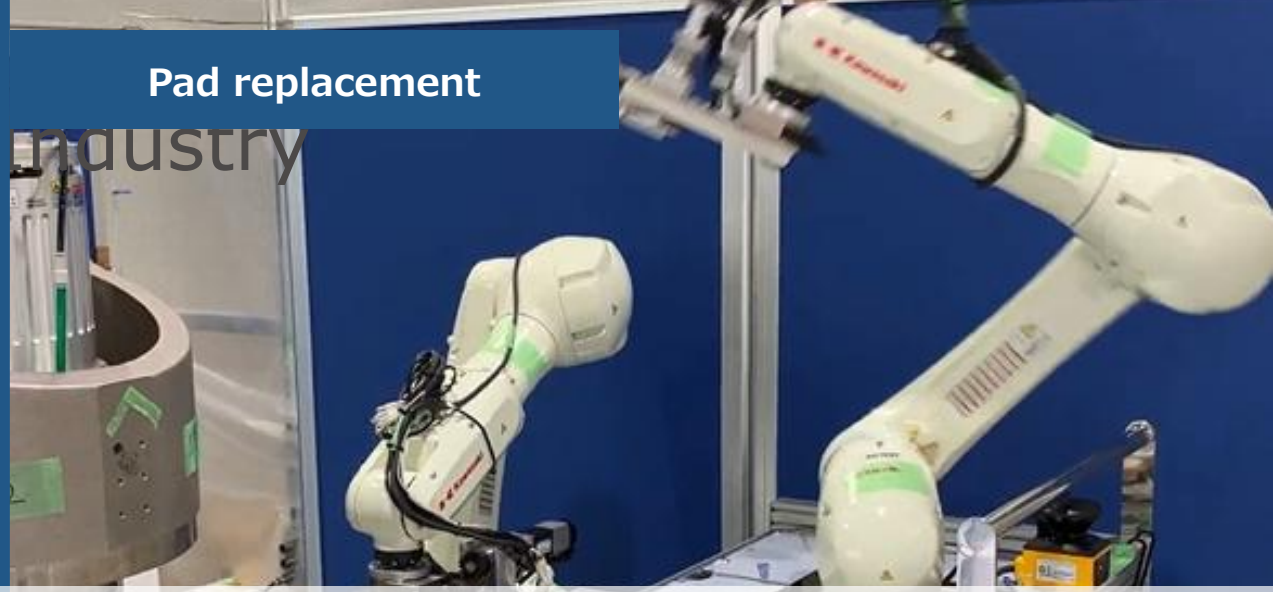
to AI-powered “factory automation”



Source:
Human Resource Trends in Japan's Semiconductor-Related Industry (Ministry of Economy, Trade and Industry)
The Semiconductor Talent Crisis: Why Growing Demand Can't Find Leaders(SEMI)

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Physical AI in Semiconductor Factories

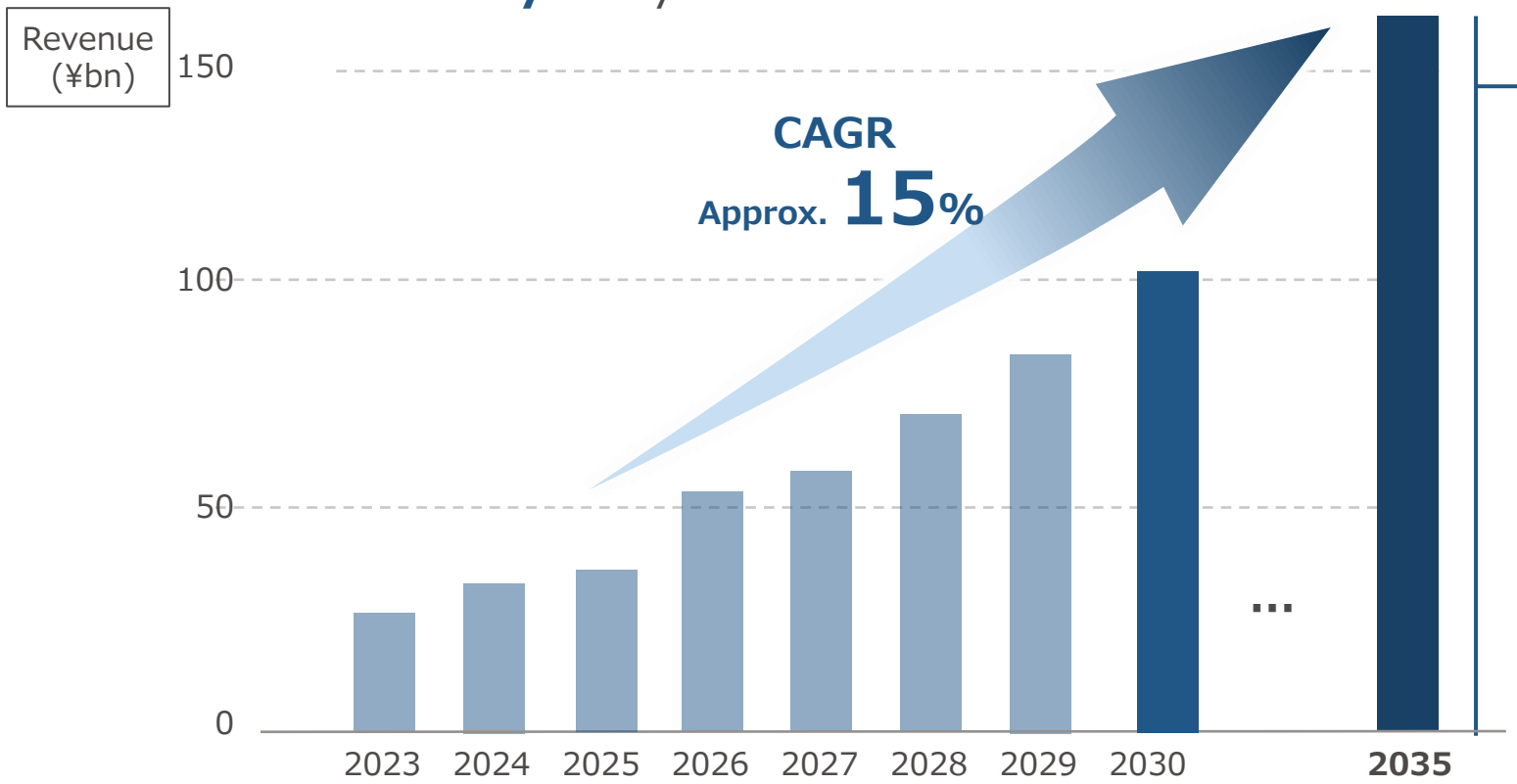
Both humanoid and industrial robots respond to customer needs





Outlook for the Semiconductor Robot Business

- We reliably capture demand by expanding capacity, **rapidly achieving both profitability and business growth**
- In the medium term, we aim to expand revenue at a CAGR of **15%**, achieving **160 billion yen** by 2035



Semiconductor Robots

160 billion yen

- Expanding the scale of the already deployed lineup



Atmospheric process | Back-end process | Vacuum process



System Products

- Automation of our Semi robot factory by physical AI

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