



華陽株式会社  
KAYOU CO.,LTD



# AGENDA

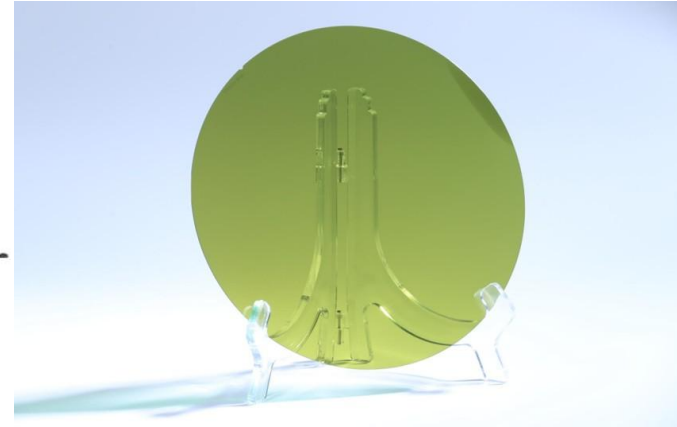
- Business Overview
- Materials field
- Advanced equipment
- Process Consumables
- Devices & Energy



# BUSINESS OVERVIEW

# 1. Our Capabilities

Kayou Co., Ltd. is a trading company building a Japan–China–Asia supply chain for SiC semiconductor materials, equipment, and consumables.



## Our Strengths

**Sourcing:** Access to upstream suppliers in China and Japan  
Short lead time / Cost competitiveness/Alternative sourcing

**Technical :** Expertise in SiC and power semiconductors  
Quality alignment/Evaluation & engineering support

## 2. COMPANY OVERVIEW

### Company Profile

## Company Milestones

- Jul 2024  
Established (Initial capital: JPY 1 million)
- Aug 2024~Mar 2025  
Appointed as Japan distributor for multiple Chinese semiconductor companies
- Jun 2025  
First participation in industry exhibition
- Aug 2025  
Achieved first-year sales of JPY 46 million
- Oct 2025  
Expanded operations with new office
- Jan 2026  
Exhibited at NEPCON Japan 2026
- Aug 2026  
Targeting annual sales of JPY 80 million+

**CEO: Chen shuka**

**Kayou Co., Ltd.**

**Capital: JPY 30 M**

**Employees: 5 → 10 (2026E)**

# 3. *Our Leadership*

## CEO Profile – Chen Shuka

Graduated from Nagoya University with a degree in Mechanical Engineering in 2003.

Joined Sumitomo Electric Industries, Ltd. in 2009, where he was responsible for the design, prototyping, and mass production of automotive electronic components.

In 2019, he joined BYD Company Limited, focusing on business development in power semiconductor modules, including product planning, supply chain coordination, and quality control (QCD).

With extensive experience in both engineering and business, as well as strong technical and supply network connections between China and Japan, he founded Kayou Co., Ltd. in 2024.

# 4. Our Products

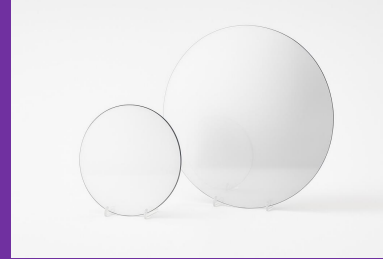
01



## Wafer & Ingot Products

SiC/Si/GaAs/SGGG  
Diamond, etc.

02



## Epitaxial & Oxidation

Homogeneous epitaxy,  
heteroepitaxy, and  
bonding processes for  
materials such as SiC,  
SiO<sub>2</sub>, Al<sub>2</sub>O<sub>3</sub>, and diamond.

03



## High-Purity Materials

GaN powder / SiC powder  
/ Rare earths  
Oxides / Rare metals /  
Functional materials

04



## Semiconductor Manufacturing Equipment

Electronic component assembly  
equipment  
SMT equipment, etc.

05



## Semiconductor Devices & Materials

(Power / Communication)  
Graphite / TaC parts  
CMP polishing slurry  
Synthetic diamond powder

06



## Process Consumables

Wafer transport containers  
Machining metal rings  
CMP carrier plates (wheels)



# PRODUCT EXAMPLES FOR DISTRIBUTION: MATERIALS FIELD

# KAYOU BUSINESS CASE - SEMISIC

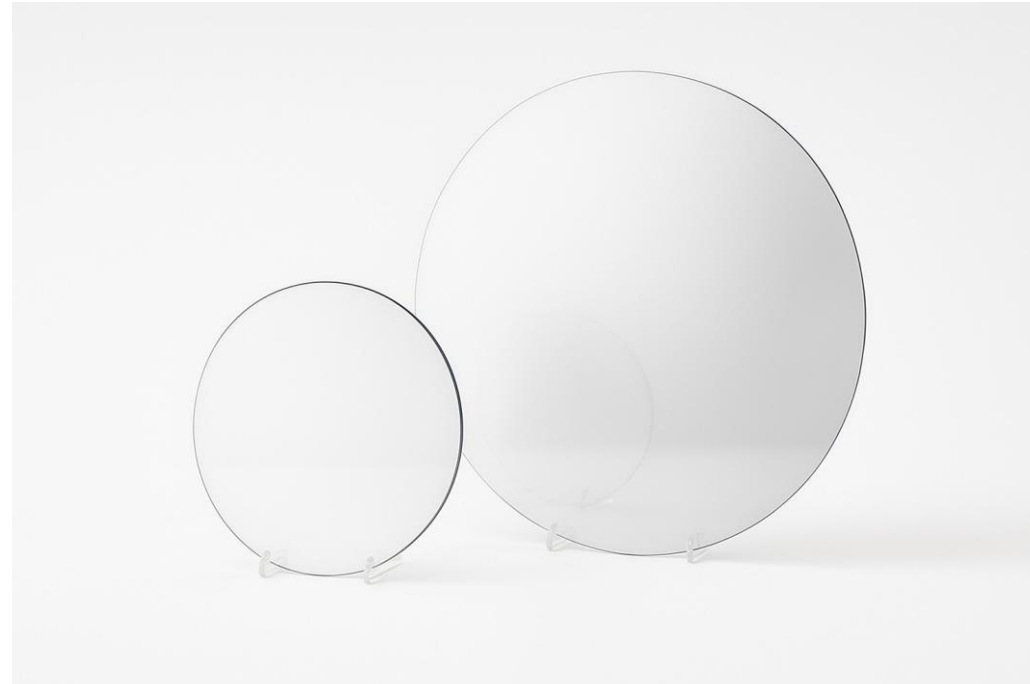
Ranked No.2 globally in 8-inch SiC wafer shipments, with SiC ingot quality recognized as world-leading.

## SiC 4H N-Type Wafer (for Power Devices)



- ▶ Highly rated by leading customers; mass production adoption underway. (Estimated order volume: JPY 370 million/month)
- ▶ R company qualified; mass production expected. (Estimated order volume: JPY 120 million/month)

## SiC 4H Semi-Insulating Wafer (for AI & AR Lenses)

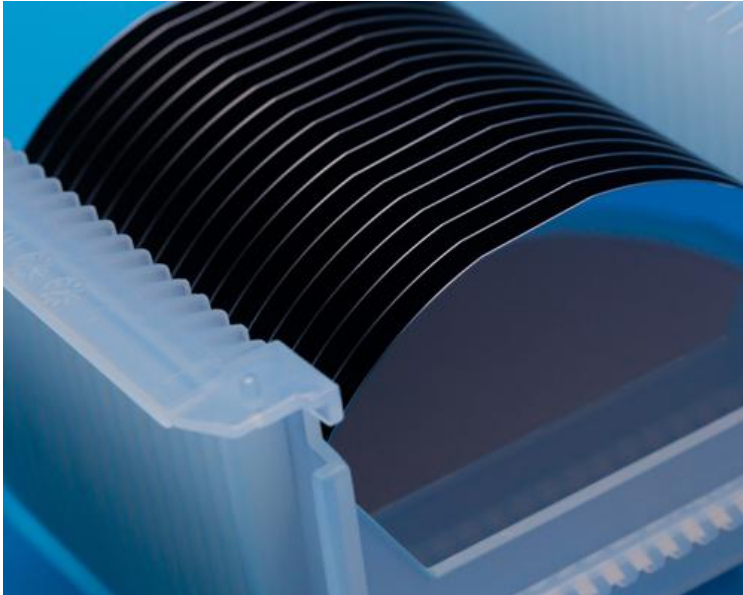


- ▶ Planned adoption in Meta's AI glasses expected to drive innovation in vision-related materials.
- ▶ Growing demand as a substrate for SiC coating in AI chip applications, particularly in Taiwan and other regions.

# KAYOU BUSINESS CASE-TYSIC&ENKRIS

Ranked No.2 globally in 8-inch SiC wafer shipments, with SiC ingot quality recognized as world-leading.

## SiC Epi Wafer (up to 30 $\mu\text{m}$ , std. 10 $\mu\text{m}$ )



- ▶ Qualified under multiple Japanese customer specifications; adoption for mass production underway.
- ▶ Ranked among the global top shipments for epitaxial wafers in FY2025.

## SiC 6/8/12" inch Ingots



- ▶ Increasing demand for 8-inch and 12-inch SiC ingots.
- ▶ Current market price for 12-inch ingots: approx. JPY400,000/mm.  
(Typical spec: ~10 mm thickness per ingot)



PRODUCT EXAMPLES FOR DISTRIBUTION: ADVANCED EQUIPMENT

No.1 in Shipment Volume of SiC Epitaxial Equipment in China

## Fully Automated Vertical Epitaxial System



- Adopted by all major SiC epitaxial foundries in China
- Cumulative shipments expected to exceed 60 units by 2025

*Kayou offers comprehensive one-stop solutions for advanced equipment, including after-sales services, technical support, installation, and commissioning.*

No.1 in Shipment Volume of Fully Automated Wafer Cleaning Equipment in China

## Fully Automated Batch-Type Wafer Etching & Cleaning System



- Widely adopted by Si, SiC, and GaN IDM manufacturers in China
- Comparable performance to TEL / SCREEN, with ~2/3 cost

順位	企業名	得点 (10点満点)
1	EV Group	9.36
2	Jiangsu ASIA Electronics	9.26
3	ASML	8.65
4	東京エレクトロン	8.47
5	KOKUSAI ELECTRIC	8.44
6	Lam Research	8.12
7	Applied Materials	8.01
8	キャノン	7.76
9	日立ハイテック	7.71
10	ニコン	7.14



- High-Precision Wafer Surface Defect Inspection System
- Applicable wafer thickness:  $\geq 1$  mm, scratches  $\geq 1$   $\mu$ m
- Etching (step height) detection:  $\geq 70$   $\mu$ m

- ▶ Fully Automated Wafer Grinding & Polishing System Processing accuracy: 0.003 mm
- ▶ Surface roughness: Ra 0.005  $\mu$ m

- Fully Automated Laser Cutting System (Up to 12-inch wafers)
- Integrated process: laser cutting, stripping, grinding, and finishing

**Kayou Partnering with 30+ equipment manufacturers across Japan, China, and Southeast Asia.**



PRODUCT EXAMPLES FOR DISTRIBUTION: PROCESS CONSUMABLES

# CONSUMABLES FOR WAFER MANUFACTURING PROCESSES



8-inch Wafer Shipping Case



8-inch / 12-inch Wafer Shipping Case  
(Multi-level type)



8-inch Wafer Single-Pack Case

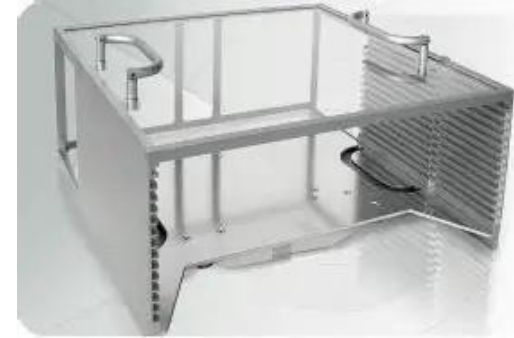


12-inch Wafer Shipping Case

**Kayou serves as the authorized distributor of SemiGlory in Japan, delivering high-quality solutions to maximize customer value.**

# CONSUMABLES FOR WAFER MANUFACTURING PROCESSES

上海朗太精密机械有限公司



Current monthly demand in Japan: approx. 12,000 units (~6 tons)

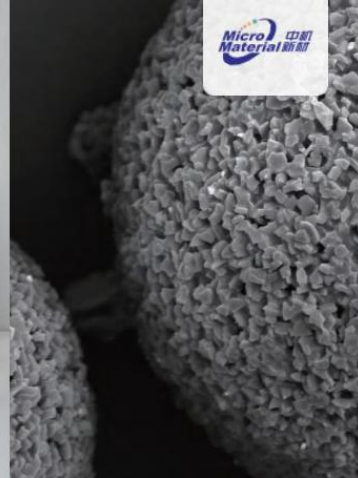
Adopted by leading major device manufacturers

Expected to reach 30,000 units/month by 2027

**Proven improvements for Japanese customers, delivering reliable products on time while meeting Japan's high-quality standards and expanding into Southeast Asia.**



# CONSUMABLES FOR WAFER MANUFACTURING PROCESSES



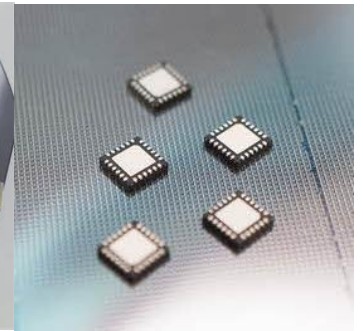
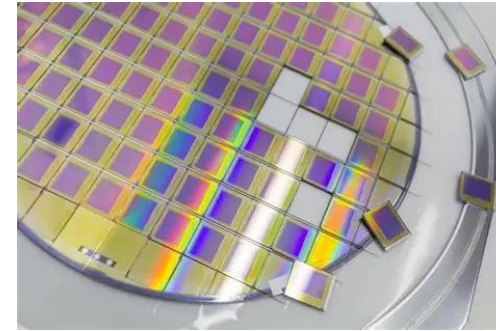
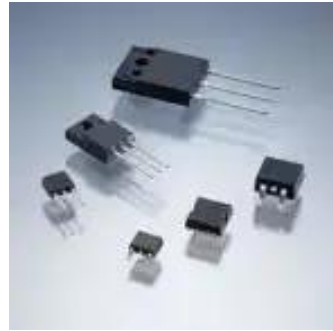
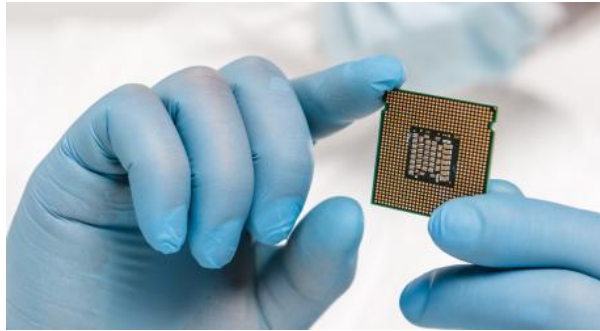
- ▶ Expanding advanced materials portfolio, including TaC-coated parts, graphite, and diamond tools.
- ▶ CMP slurry solutions qualified by a leading Japanese customer, ready for mass production.

Kayou is actively expanding its business into Southeast Asia by leveraging advanced semiconductor technologies developed in Japan and China, delivering timely and in-demand products.



PRODUCT EXAMPLES FOR DISTRIBUTION: DEVICES & ENERGY

# INITIATIVES IN POWER DEVICES & ENERGY



We support the development of offshore solar power projects in emerging markets (currently Thailand), offering integrated solutions covering power generation, energy storage, and electricity sales.

Providing SiC module solutions to an electric motorcycle manufacturer in Thailand, with a strategic alliance currently in progress.

Proposing an energy storage system project in Vietnam, with ongoing positive discussions in collaboration with the local government.

THANK YOU VERY MUCH FOR YOUR VALUABLE TIME.

KAYOU CO.,LTD.

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