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KEY LEADERSHIP INTERVIEW

Mr. Hideki Ito

Executive Management,
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SEMICON Southeast Asia 2026
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From your perspective, what are the most significant shifts currently shaping the semiconductor equipment landscape, particularly as demand grows for advanced nodes, AI, and high-performance computing?

The semiconductor equipment landscape is being reshaped by explosive AI/HPC demand, accelerating data center investments, and continued node diversification. Customers are investing heavily in advanced logic and high bandwidth memory as well as in 3D architectures—driving higher layer counts, tighter process windows, and more complex materials. Fab construction is expanding globally, creating demand for both throughput and faster ramp capability. Concurrently, sustainability and energy efficiency are rising priorities as data center power consumption grows. These forces raise the bar for equipment: higher precision, greater productivity, tighter process control, and integrated digital services. Vendors must deliver not only tools but AI driven process solutions and field services to secure yield and uptime at scale.

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With your background in etching and 3D integration, how do you see these technologies evolving to support next generation semiconductor innovation?

Etching and 3D integration will be at the heart of next generation devices. Advanced etch capabilities are essential for high aspect ratio features, multi-level interconnects and DRAM capacitor structures; these capabilities directly enable HBM and stacked memories. Meanwhile, 3D integration — from die bonding to through silicon via formation and interconnect — demands extremely tight overlay, low damage processes, and void free interlayer fill. We see strong growth in process modules like DRAM wiring etch and plasma CVD Gapfill, and in 3D assembly tools such as advanced bonders and die probers. Combining precise etch, gapfill and bonding with analytics and automation will be critical to yield, manufacturability and cost for stacked architectures.

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How does Tokyo Electron differentiate itself within the semiconductor value chain, especially in an increasingly competitive and innovation driven market?

Tokyo Electron differentiates through a combination of product performance, system level solutions, and deep customer engagement. We invest in Next Generation Products that target high value processes—etch, deposition, bonding and test—with demonstrable yields and throughput Epsira™ represents a bold new Digital Transformation (DX) concept for elevating both equipment and field productivity. By fusing AI, robotics, and field analytics, it drives down variability, minimizes downtime, and mitigates on-site skill gaps—while upholding quality, compliance, and sustainability to align equipment performance with long-term customer productivity. Global support, close co development with leading foundries and memory makers, and a strong services footprint allow us to translate technology into measurable fab outcomes—making TEL not just a tool supplier, but a trusted partner across the value chain.

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The semiconductor industry is highly cyclical — how does Tokyo Electron balance long term innovation with the need to remain resilient across market fluctuations?

We balance long term innovation and resilience through portfolio diversification, disciplined investment, and customer centric services. While continuing to develop breakthrough equipment for advanced nodes and 3D architectures, we also expand recurring revenue streams—service, retrofits, Digital Transformation (DX) solutions—and pursue SAM expansion across logic, DRAM and NAND. Financial discipline and scenario planning guide R&D cadence and capacity expansion. Close collaboration with customers helps align roadmaps to real demand, reducing cycle risk. We also invest in operational excellence, workforce engagement and digital tools that improve responsiveness. This dual focus sustains technological leadership while smoothing performance across market cycles.

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What role does equipment innovation play in enabling emerging technologies such as AI and advanced packaging?

Equipment innovation is foundational: it turns architectural promise into manufacturable reality. For AI, equipment must enable high performance logic and memory with tight process control, high throughput and energy efficient implementations. For advanced packaging and 3D stacking, specialized bonders, device probers, precision etch and void free gapfill deposition are essential to achieve interconnect density and reliability. Innovation also spans software and services: AI driven process control, predictive maintenance and robotic field support reduce variability and downtime. Together, these advances lower cost per inference, increase yield and accelerate time to volume—directly enabling scalable AI systems and complex heterogeneous integration for future products.

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