

DISCOVER

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# **JETRO Symposium Asia Pacific Economic Integration May 15, 2013**

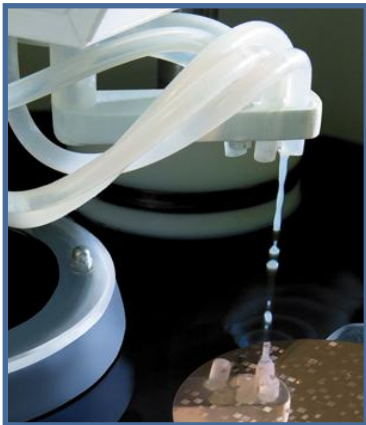
**Bill Noglows,  
Chairman and CEO**

# Safe Harbor Statement

*The information contained in and discussed during this presentation may include “forward-looking statements” within the meaning of federal securities regulations. These forward-looking statements involve a number of risks, uncertainties, and other factors, including those described in Cabot Microelectronics’ filings with the Securities and Exchange Commission (SEC), that could cause actual results to differ materially from those described by these forward-looking statements. Cabot Microelectronics Corporation assumes no obligation to update this forward-looking information.*

# Cabot Microelectronics Overview

- **CCMP:** NASDAQ
- **Headquarters:** Aurora, IL (West of Chicago)
- **Operations:** U.S., Japan, Taiwan, Korea, Singapore, China, France, Germany, Italy, UK
- **Revenue:** \$428 million (FY2012)
- **Employees:** 1,050 (as of March 31, 2013)

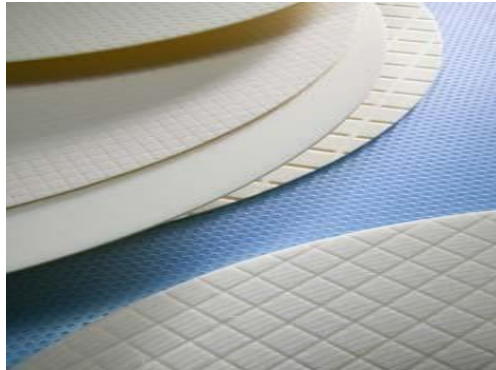


- **Leading supplier of chemical mechanical planarization (CMP) slurries and growing supplier of CMP pads to the semiconductor industry**
- **Products are used to level, smooth and remove excess material from the multiple layers deposited upon silicon wafers used in the manufacture of semiconductor devices**
- **Supply virtually all semiconductor manufacturers in the world**
- **Robust product portfolio, serving all applications and technology nodes (1,050 patents world-wide, as of March 31, 2013)**
- **Technology and manufacturing centers located in the United States and Asia Pacific region**



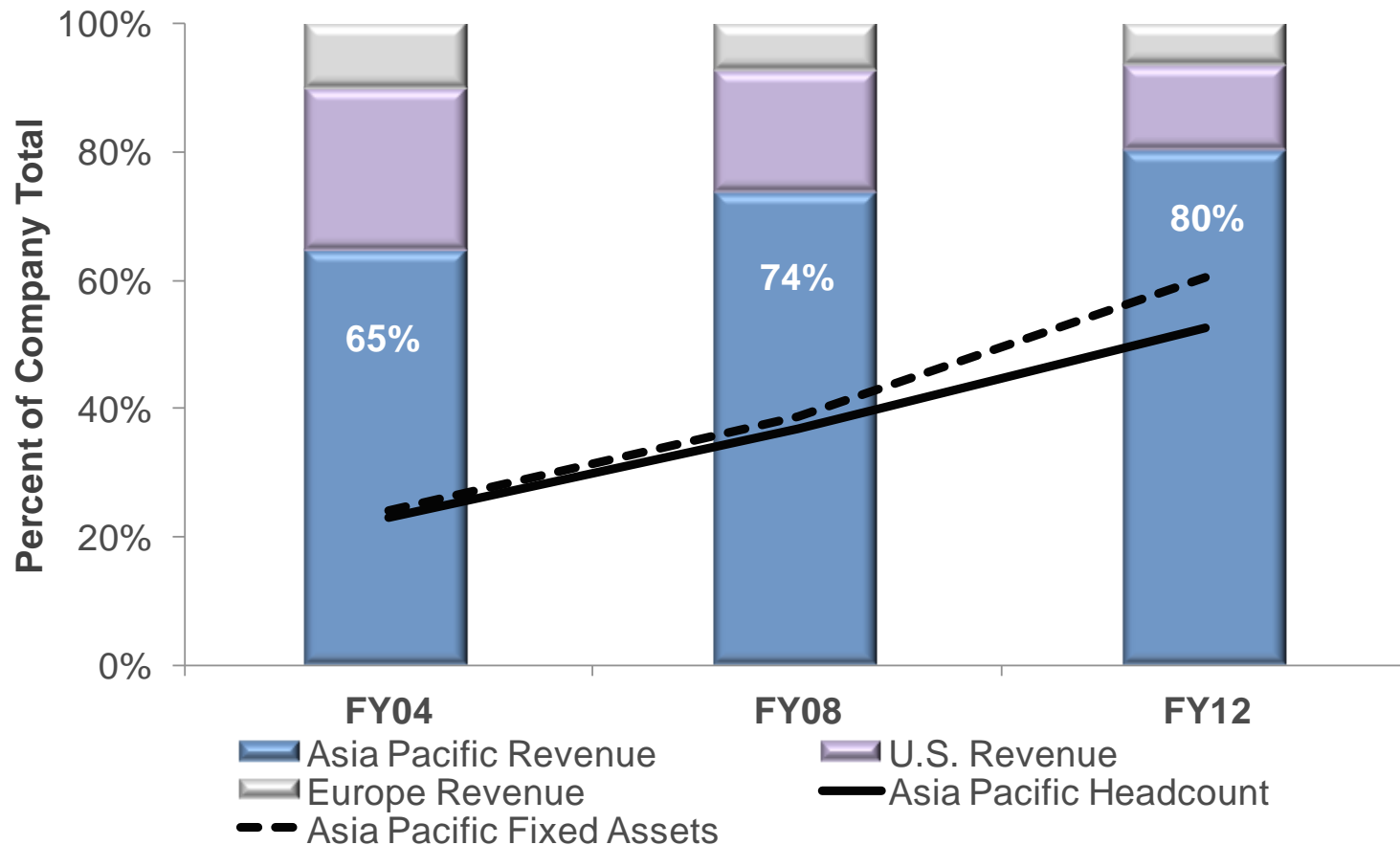
# Cabot Microelectronics' CMP Consumables

Positive trends in mobile connectivity, mobile devices and other electronic products drive demand for CMP consumables.



# Cabot Microelectronics' Asia Pacific Economic Integration

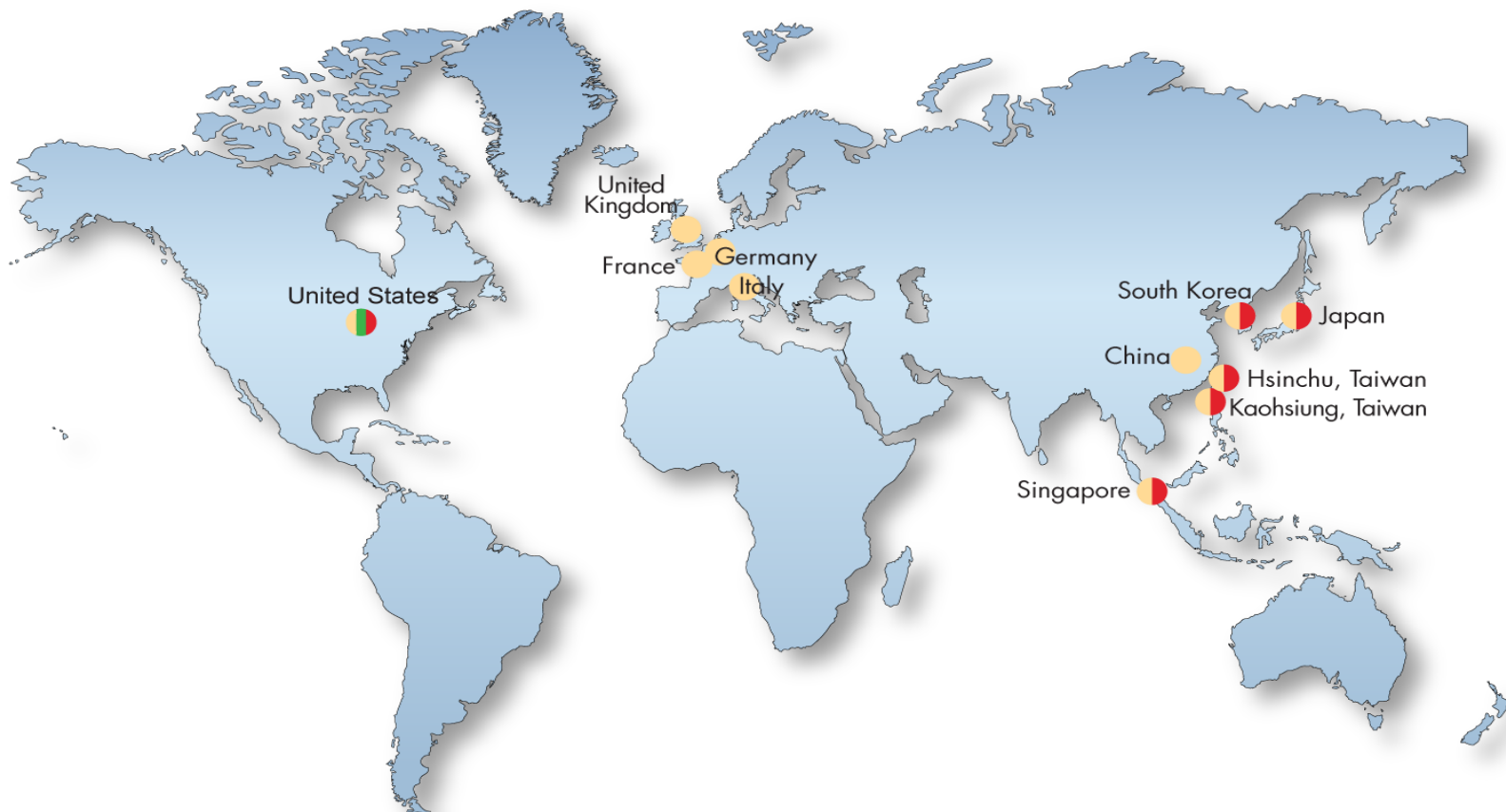
We have expanded our infrastructure to better serve our growing customer base in the Asia Pacific region. Approximately half of the company's global staff and 60% of the company's fixed assets are located in the Asia Pacific region.





# Cabot Microelectronics' Global Footprint

Positioned for continued success as we leverage our global capabilities to consistently deliver high-quality, reliable and innovative solutions to our customers.



● Global Headquarters

● Manufacturing / R&D

● Customer Support Personnel

# Japan Operations



- Located in Mie, established in 1998
- Slurry manufacturing plant, R&D facility and technical center

## Why Mie?

- Close to customers and suppliers
- Access to ports, highway and airport
- Affordable costs (start-up and operating)
- Manufacturing and tech-oriented talent
- Supportive government



# Why Japan Was a Good Decision

## Mie Government:

- Seamless start up and ongoing support
- Responsiveness, speed
- Financial incentive programs

## Our Operations:

- Timely ramp up, optimal return on initial investment
- Stable operations and intellectual property protection
- Strong commitment and dedication to quality
- Significant contribution to growth in Asia
- Implementation of best practices throughout Asia Pacific and United States



# Taiwan, Singapore and South Korea Operations

We expanded our global footprint in the Asia Pacific region to better meet the needs of our customers.



Taiwan – Hsinchu and Kaohsiung



Singapore



South Korea – Gyeonggi Province



# Asia Pacific Economic Integration - Challenges

## Challenges:

- Cultural diversity (“Asia” not monolithic)
- Competition for top talent (leadership development and retention)
- Profitability, competing against share-driven local competition
- Alignment and communication of global strategy
- Intellectual property development and protection

# Asia Pacific Economic Integration - Opportunities

## Opportunities:

- Growth trends
- Leverage and integrate regional capabilities (global collaboration)
- Diverse and high powered talent pool
- Identification of local suppliers (new material, low cost)
- Exposure to new business opportunities and emerging markets

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