Marubeni IR Day 2026

Initiatives for the Next Generation:
AI & Semiconductor Fields

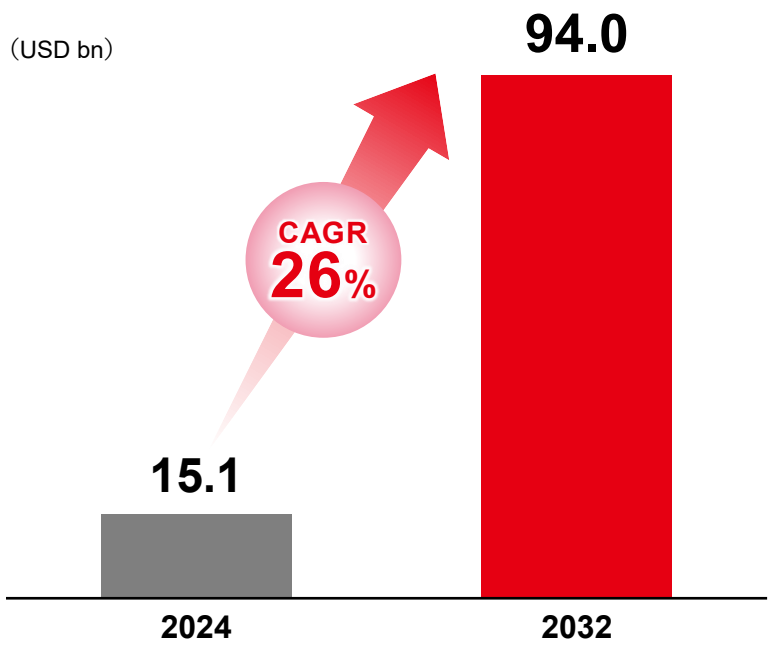
Executive Officer
COO, Next Generation Business Development Div.
Dai Sakakura

Marubeni

Physical Constraints Emerging from the Expansion of AI Data Centers

Advances in AI and its expanding adoption are accelerating investment in AI data centers.
Six physical constraints are emerging across the supply chain that supports growth in the AI era

AI Data Center Market Size Forecast



*Source: Calculated based on data from Fortune Business Insights

Physical Constraints Emerging as Investment in AI Data Centers Expands

Advances in AI and Expansion of Applications → Expansion of Implementation in Companies and Industries → Expansion of AI Data Center Capacity and Investment

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Demand for Higher-Performance, Higher-Density AI Servers

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Emergence of Physical Constraints

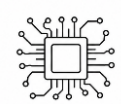
High-Performance Devices	Manufacturing & Assembly	AI Infrastructure	Power & Energy	Critical Materials	Communications Infrastructure
Supply Constraints for High-Density Substrates and High-Performance Electronic Components	Addressing Semiconductor Miniaturization and Stacking, Precision Machining, and Automation	Power Leveling, Protection against Momentary Power Dips, GPU Protection, and Improved Inference Efficiency	Constraints on Power Supply and Transmission Grids Driven by AI Data Center Expansion	Securing Copper and Other Resources Essential for Power Grids, Semiconductors, and Electronic Equipment	Fiber-Optic and Communications Networks; Faster Data Transmission

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Marubeni Group Business Foundations for Addressing Physical Constraints in the AI Era

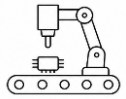
Bringing together our business foundations in power, resources, communications, and next-generation businesses, the Marubeni Group will address physical constraints across the entire AI supply chain.
Our division will focus on high-performance devices, manufacturing and assembly, and AI infrastructure optimization

Today's Presentation



High-Performance Devices

Meeting surging demand for high-density substrates and high-performance electronic components, and strengthening the supply of core components for next-generation servers.



Industrial Solutions

Providing advanced manufacturing equipment that supports semiconductor miniaturization and stacking, as well as data center cooling solutions.



AI Infrastructure Optimization

Power leveling and protection against momentary power dips; protection of high-value assets such as GPUs; and reductions in inference costs and power consumption.

Our AI Physical Constraints Solution Business

A multifaceted approach to the supply chain

Marubeni Group Initiatives

Power Business



UK

Market share in data center sector: Approx. 20%

Source: Marubeni analysis based on government-published data

Power & Energy

Expanding power generation and transmission networks and establishing a stable, low-carbon power supply for AI data centers.

Copper Business



Critical Materials

Advancing the development and stable supply of copper resources essential for power grids, high-performance semiconductors, and electronic equipment.

Communications Infrastructure Business



Connectivity Technologies

Developing fiber-optic and high-speed communications networks and optimizing them to accommodate rising data traffic.

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Unlocking Growth Constraints in AI and Semiconductors:
Upfront Investments and Business Foundations in Three Key Areas

Marubeni

By combining our existing business foundations with investments in next-generation technologies, we address physical constraints that impede growth. Through approaches tailored to business maturity levels - expanding existing businesses, partnerships, and investments - we will achieve discontinuous growth

Our Strengths

Discernment and Engineering Capabilities

Securing Competitively Advantageous Products

Providing comprehensive technical solutions from design and ODM through application development

Access to Advanced Technologies

Selecting Outstanding Companies through Rigorous Analysis

Bringing Japan's advanced technologies to the world through business and capital alliances and M&A

Rapid Deployment Capabilities

Rapidly deploying new technologies by leveraging our customer and supplier networks

Global Customer and Supplier Networks

Leveraging relationships with over 5,000 customers and suppliers worldwide

Examples of Marubeni's Initiatives

Growth Area / Maturity	Market Challenges / Physical Constraints	Initiatives / Business Foundations	Aim
Device Solutions Existing Business Enhancement	Surge in demand for high-performance components; increasingly sophisticated and complex circuit design	Marubeni Ele-Next / OS Electronics / DTDS • Diversified operations and extensive product lineup in Japan, ASEAN, and India • Leveraging our circuit design and ODM capabilities	Stable supply of high-performance electronic components and global expansion of design and ODM capabilities
Industrial Solutions Existing Businesses + Partnerships	Needs for semiconductor miniaturization and stacking, precision packaging, and process automation	Marubeni Techno-Systems / Beams / Marubeni Citizen-Cincom • Enhancing value through capital and business alliances with leading technology companies • Providing an integrated range of services, from equipment sales to engineering and maintenance	Continuous strengthening of technological foundations to solve manufacturing and assembly challenges
AI Infra Optimization Partnerships / Market Development Investment / Commercialization	Increasing sophistication and cost of GPUs; risks associated with power fluctuations and momentary power dips Rising inference costs and delays in societal deployment due to power constraints	Skeleton Technologies • Commercial deployment of high-power, long-life next-generation energy storage devices • Supporting the stable operation of AI data centers Multiverse Computing • Improving inference efficiency with proprietary quantum-inspired technology • Contributing to the expansion of edge and physical AI implementation	Resolving power constraints and protecting high-value assets, including GPUs Improving inference efficiency and reducing power consumption, thereby contributing to broader AI adoption

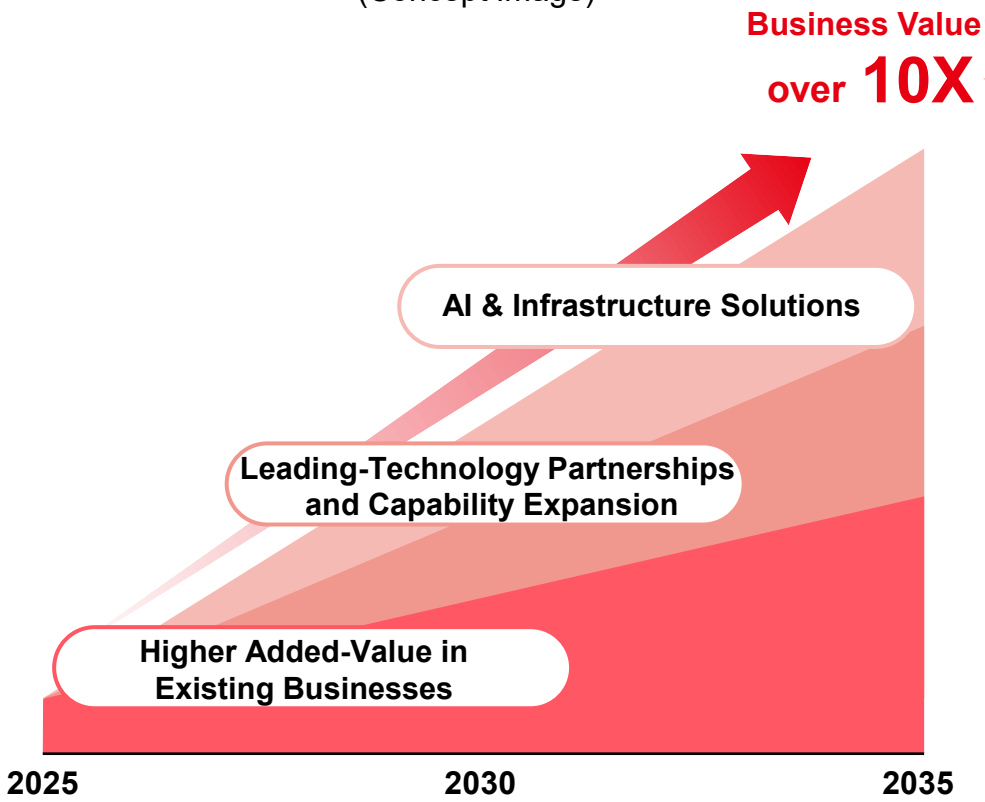
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Business Value Enhancement Scenarios toward 2035

We will simultaneously work to add higher-value to our existing businesses while monetizing new AI ventures. Through partnerships and M&A as catalysts for growth, we aim to increase business value more than tenfold by 2035

Business Value Enhancement Roadmap

(Concept Image)



Three Priority Areas Pursued in Parallel

Devices	Industrial	AI Infrastructure
Higher Value Added in Existing Businesses	**Existing Businesses + Partnerships**	**Commercialization / Market Expansion**
Expanding electronic component and semiconductor offerings and increasing added value through circuit design and other capabilities	Integrating advanced technologies to provide equipment and services for AI data centers	Addressing power constraints and protecting high-value assets in AI data centers; improving inference efficiency and reducing power consumption to broaden AI adoption

Catalysts for Discontinuous Growth

- Access to Leading Companies; Business and Capital Alliances; M&A
- Engineering and Application Development
- Expansion across Asia and the World
- Customer and Supplier Networks

Toward a high-added-value solutions platform that overcomes growth constraints in the AI and semiconductor industries

Working across the Marubeni Group—including power, resources, and communications infrastructure—to expand businesses addressing physical constraints in the AI era.

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