## **Table of Contents**

## Contents

Table	Table of Contents	
List o	f Figures	9
1.	Executive Summary	11
1.1.	Supply-Chain Challenges	11
2.	Scope	11
3.	Introduction	12
3.1.	The Start and Growth of the Semiconductor Industry	14
3.2.	The Asian Semiconductor Industry	19
3.3.	The Changing Market	20
3.4.	Where have we come from?	22
4.	Future Trends	23
4.1.	Economics	23
4.2.	MegaFabs and Gigafabs	26
4.3.	Inflection Points	30
4.4.	TECHCET's Wafer Forecast Model	31
5.	Device Technologies	36
5.1.1.	LOGIC	37
5.1.2.	Memory	41
5.1.3.	NON-VOLATILE MEMORY	42
5.1.4.	3D NAND	43
5.1.5.	STORAGE CLASS MEMORY DEVICES	46
5.1.5	1. 3D XPoint	46
5.2.	New Device Structures	47
5.2.1.	Memory Structures	47
5.2.2.	Logic Structures	48
5.3.	New Memory	52
5.3.1.	, RRAM or ReRAM	52
5.3.2.	STT-RAM	53
5.3.3.	PCRAM	55
	EADAM	57
5.3.4.	FeRAM	37

Page 4 (of 126) COMPANY USE ONLY

5.4.	Limited or Research stage	58
5.4.1.	MVO	58
5.4.2.	CBRAM	60
5.4.3.	NRAM	61
5.4.4.	Molecular/Carbon	62
5-4-5- 5-4-5- 5-4-5-		63 63 63
5.4.6. 5.5. 6. 6.1. 6.2. 6.2. 6.3. 6.4. 6.5. 6.6. 6.7. 6.8.	III-V Channel Replacement Devices IoT Impacts Device to Process to Material 3D NAND Process Challenge New Materials used in Memory Device Formation Interconnect Lithography ALD ALE – Atomic Layer Etching Cleaning Materials	64 66 70 73 73 74 77 83 88 90 92 94
6.8.1.	ALD/CVD PRECURSORS	94
6.8.2.	Device Formation	94
6.8.3.	Interconnect	95
6.8.4.	Market Environment	95
6.8.5.	Gases	96
6.8.6.	Inert Gases	98
6.8.7.	Bulk Chemicals	99
6.8.8. 6.9. 6.10. 6.11. 7.	Photoresists, Ancillaries & Extension Materials Process Materials Concerns & Issues	100 103 103 105 107
7.11. 7.12.	Materials Supply Chain Management Quality and Purity Issues	107 107

Page 5 (of 127) COMPANY USE ONLY

7.13.	Materials Supply Chain Issues	110
7.14.	Future Materials Requirements and Rare Earths Minerals and Metals	111
8.	Changes in the Materials Market Opportunities	112
8.1.	IoT opportunities	112
9.	Global and Operation issues	112
9.1.	Recycling	112
9.2.	Cost Structure Changes	113
9.3.	WIP Management	115
9.4.	Semiconductor Center of Gravity Shifts West	115
9.5.	Meeting the China Challenges	118
11.	Conclusions & Take Aways	122
12.	Bibliography	124
13.	TECHCET Critical Materials Report Advisories	125

## List of Figures

Figure 1 Shockley Laboratory – where the semiconductor industry began Figure 2 Silicon Valley Genealogy Figure 3 Japanese Yen to US Dollar Exchange Rates from 1976 to 2016 Figure 4 Hsinchu Science Park Figure 5 Elements used in today's smartphones Figure 6 Depletion of elements - how long will the supply of certain elements last? Figure 7 TSMC Wafer Revenue from Advance Process Technology 22 Figure 8 TSMC Cell Cost Trends Figure 9 Companies building major Fabs and growth in Fab CAPEX and process development costs. Figure 10 Capex for Top 10 Semiconductor Companies - Revenue Figure 11 High purity semiconductor utility systems – Training Opportunity Figure 12 TECHCET's Wafer Forecast Model Figure 13 Emerging Memory Devices Figure 14 Memory Scaling Wall Figure 15 IMEC Logic Roadmap Figure 16 Transistor Revolution (AMAT Inflection Point Presentations) Figure 17 Key Inflections in Moore's Law (AMAT Inflection Presentation) DRAM Figure 18 Advantages of Vertical MOSFETs Figure 19 V-NAND TEM showing levels Figure 20 V-NAND showing gate detail (AMAT) Figure 21 V-NAND showing stair-step interconnect structure (Techinsights) Figure 23 What is 3D XPpoint? Figure 24 Recessed Channel Transistors Figure 25 Replacement Gate Transistor Stacking Figure 26 LETI CoolCube

> Page 9 (of 126) COMPANY USE ONLY

Figure 27 Heat map Figure 28 Which Materials are Manufacturing Worthy? Figure 29 HfOx Based RRAM Figure 30 STT-RAM Structure Figure 31 Complex Structure for STT-RAM (ITRS) Figure 32 Phase Change Materials Figure 33 Chalcogenide Phase Change Memory Figure 34 FeRAM Material Figure 35 FRAM Figure 36 Alternative Memory Concepts (Micron) Figure 37 CBRAM showing states Figure 38 Re-RAM Dual CbRAM Figure 39 NRAM or Nano RAM Figure 40 Molecular Memory Device Figure 41 Flow of 200mm tools to China Figure 42 IoT growth (ITRS and INEMI Public 2016) Figure 43 200mm Fab count since 2007 (TECHCET) Figure 44 ASPs of 200mm tools purchased by fabs in China (Global Surplus) Figure 45 IoT semiconductor market by market sector (IBS 2015) Figure 46 It's Elemental(Micron) Figure 47 Logic Cross Section (AMAT/Techinsight) Figure 48 ITRS Half-pitch Conversion (ITRS) Figure 50 Mask by Node (TECHCET) Figure 51 EUV Schematic indicating the complexity Figure 52 Masks per Mask Set (eBeam Initiative) Figure 53 Market Share of ASML, Canon and Nikon Figure 54 ALD Materials Innovations Figure 55 ALE Cycles Figure 56 ALE and ALD steps Figure 57 Neon Supply Matrix Figure 58 Gases as a percentage of Air Figure 59 Control Charts Figure 60 Material Supply Problems Figure 61 Technology Roadmap for IoT Figure 62 Parameters by NODE

## List of Tables

Table 1 Progress over 4 Decades Table 2 Cost Analysis Table Table 3 ITRS Logic Roadmap (2015) Table 4 DRAM Technology Table 5 NAND Flash Table 6 Devices and Materials Table 7 Interconnect levels Logic/Memory(IMEC) Table 9 Scaling Trend - ALD Applications for Memory & Logic Table 7 Upcoming Chinese Fabs