

SUMMER
2020



2020 TECHCET's CRITICAL MATERIALS REPORT™ CVD, ALD & SOD DIELECTRIC PRECURSORS FOR SEMICONDUCTOR APPLICATIONS

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TABLE OF CONTENTS

1 Executive Summary.....	11
1.1 Precursors Market Forecasts & 5-Year CAGRs	11
1.2 Competitive Landscape	12
1.3 M&A Activities.....	14
1.4 Precursors & Technology Trends	15
1.5 Supply-Chain Issues.....	17
1.6 EHS Issues/Concerns	17
1.7 Analyst Assessment	17
2 Scope, Purpose, and Methodology	20
2.1 Scope	20
2.2 Purpose	20
2.3 Methodology	20
2.4 Overview of Other TECHCET CMR™ Reports	21
3 Semiconductor market outlook.....	22
3.1 Worldwide Economy.....	24
3.1.1 Semiconductor Industries Ties to the Global Economy	26
3.2 Electronic Goods Market.....	28
3.2.1 Smartphones	29
3.2.2 Automotive	30
3.2.3 Servers / IT	34
3.2.4 PCs / Tablets	36
3.3 Semiconductor Industry Outlook.....	37
3.3.1 Equipment Spending and Fab and Capital Investments	39
3.3.2 Overall China Market News and Trends	41
3.3.3 Wafer Start Forecast.....	43
3.3.3.1 MEMS & Legacy Devices.....	43
3.3.3.2 Advanced and Leading Edge Devices	44
3.3.3.3 TECHCET Wafer Start Model Background	46
3.4 Semiconductor Market Overview Summary	47
4 Semiconductor precursors market trends.....	49

4.1	Advanced Dielectric and Spin on Dielectric precursors	52
4.2	Technical Drivers / Material Changes and Transitions	53
4.3	Leading Edge Logic	54
4.4	DRAM	54
4.5	3DNAND	56
4.6	Emerging Memory Devices.....	57
4.7	Chip Fab Announcements & Activities.....	57
4.7.1	Comment on Regional Trends/Drivers	59
4.7.2	Changes in standard packaging/valve types.....	61
5	Precursors Market Landscape	62
5.1	Fab Material Supply/Demand	62
5.2	Market Share & Regional Ranking	64
5.3	Regional Ranking	65
5.4	M&A Activity	68
5.4.1	Linde-Praxair.....	68
5.4.2	DowDuPont.....	69
5.4.3	Versum Materials takeover deal by Merck KGaA	70
5.4.4	The logic behind the Linde-Praxair merger and Merck take over Versum?	70
5.4.5	MPD Chemicals acquires Norquay Technology and then gets acquired by Entegris.....	72
5.4.6	M&A activity in the CVD and ALD OEM segment	73
5.4.6.1	Applied Materials Kokusai take over.....	73
5.4.6.2	PlasmaTherm acquires KOBUS	75
5.4.6.3	ACM Research Enters Dry Processing Market and Launch of CVD/ALD Ultra Furnace	75
5.4.7	Summary of additional merger and take over activities.....	76
5.5	New Plants and New Entrants.....	77
5.5.1	Air Liquide to invest €200 million in Taiwan to support semiconductor manufacturers	77
5.6	Plant Closures and Product Discontinuations	77
5.7	New Entrants	78
5.7.1	MERCK	78
5.7.2	Mitsubishi Chemical Acquiring Gelest	78
5.8	Suppliers or Parts/Product Line That is at Risk of Discontinuations	79
5.9	Precursor IP Filing	80

5.9.1	Dielectric precursor IP	80
5.9.2	ALD IP filing and global distribution of IP	83
5.9.3	Dielectrics and High-k IP trends.....	85
6	Supplier profiles.....	87
Adeka	Kojundo	Tanaka
Air Liquide	Linde	TCI
Azmax Co.	Mercaro	Trichemical Labs
DNF	Merck EMD / Versum	umicore
Entegris	Nanmat	UPChem / Yoke
EpiValence	Norquay / Entegris	Versum / Merck EMD
Gelest	Praxair/ Linde	Wonik
Hansol	SoulBrain	Zillion
HC Starck	Strem	
7 APPENDIX A: LOGIC AND MEMORY TECHNOLOGIES BACKGROUND / TREND BASICS–		
FROM TECHCET's 2019 CMR™ REPORT		220
7.1	Multi-patterning & EUV Lithography	220
7.2	Interconnect Trends.....	225
7.3	Copper Interconnect	227
7.3.1	Cobalt interconnects, liners, and caps.....	228
7.3.2	Ruthenium Interconnects.....	233
7.3.3	High-aspect-ratio ruthenium power rails	234
7.3.4	Manganese Barrier Metal.....	235
7.4	Logic Transistor Evolution	235
7.4.1.1	5 nm and beyond.....	240
7.4.2	Extending FinFET to Horizontal Nanowires GAA FETs	242
7.4.3	Realizing vertical Logic - Going vertical (2.5/3D)	246
7.5	Memory Evolution & Future Trends	249
7.5.1	DRAM.....	250
7.5.2	2D to 3DNAND transition.....	255
7.5.3	Alternative NVM Technologies	257
8	APPENDIX B: ACRONYMS	258

TABLE OF FIGURES

Figure 2: The total advanced dielectric and spin-on dielectric precursor market (2014 to 2024)	12
Figure 3: Global Economy and the Electronics Supply Chain (2019)	27
Figure 4: Worldwide Semiconductor Sales	28
Figure 5: Semiconductor Chip Applications	29
Figure 6: Mobile Phone Shipments WW Estimates	30
Figure 7: Oil Price per Barrel US WTI	32
Figure 8: Semiconductor Spend per Vehicle Type.....	33
Figure 9: Semiconductor Content by Automotive Application.....	34
Figure 10: Semiconductor Revenue Growth Forecasts (as of April 19, 2020).....	38
Figure 11: Semiconductor Units History and Forecast	39
Figure 12: 200 mm Fab Capacity Outlook to 2022.....	44
Figure 13: TECHCET Wafer Starts by Technology Node and Device Type.....	46
Figure 14: PVD, CVD, and ALD chamber shipments 2014 to 2024.	49
Figure 15: IP filing and grants in the CVD and ALD space by OEMs as of November 2019. Please note that a large part of 2018 and 2019 applications were still in the pipeline due to 18-month delay.....	50
Figure 16: TECHCET Wafer Starts by Technology Node and Device Type.....	52
Figure 18: The total advanced dielectric and spin-on dielectric precursor market 2014 to 2024..	53
Figure 19: Process and materials changes required to shrinking logic down to sub 2 nm.....	54
Figure 20: Process and materials changes required to shrinking DRAM down to 10 nm.....	55
Figure 21: Process and materials changes required to shrinking 3DNAND up to 2xx layers.....	56
Figure 22: TSMC Fab 18 is the 5nm production facility	58
Figure 24: Xtacking diagram with peripheral controller logic die placed above separate NAND die	60
Figure 25: ChangXin Memory thus far completed the R&D and Fab 1.....	61
Figure 28: TECHCET SOD Precursor Revenue 2014 to 2024	63
Figure 30 Market Share Of Precursor Companies for Dielectric Precursors(% of total revenues) ...	65

Figure 31 Regional market share of precursor companies for metal and high-k precursors 2019.	66
Figure 32 Regional Market Share Of Precursor Companies for Dielectric Precursors	67
Figure 33: Annual revenue of major gas and chemical companies supplying precursors and gases to the semiconductor industry.	71
Figure 35: Overview of IP filed in the segment Spatial ALD.....	74
Figure 36: Assessment Of The CVD & ALD 8 And 6 Inch Market By OEM.....	80
Figure 37: The relative age distribution of segmented dielectric precursors filed by OEMs, chemical companies, fabricators, and research organization in the last two decades.	82
Figure 38: Distribution of dielectric precursor IP by OEMs, IDM/Foundries, and Chemical Suppliers.	83
Figure 39: Filed IP in the field of Atomic Layer deposition.	84
Figure 40: Global Filed IP in the field of Atomic Layer deposition.	84
Figure 41: PEALD publications for dielectrics.	85
Figure 42: Dielectric and High-k IP Applications segmented by a deposition method.....	86
Figure 62: Double patterning by increases density so-called LELE for “Litho-Etch-Litho-Etch.	221
Figure 63: Self-aligned quadruple patterning (SAQP).	221
Figure 64: Hardmask to Prevent Pattern Collapse.....	222
Figure 65: Dimensional scaling under pressure	223
Figure 66: EPE is the difference between the intended and the printed features of an IC layout. Shrinking dimensions exacerbate EPE issues.....	224
Figure 67: Local and global interconnects.	226
Figure 68: The innovative copper metallization technique by IBM from 1997 produced a chip with six layers of copper circuitry with circuit line widths of 0.20 microns.....	227
Figure 69: Extending copper requires co-optimization of ALD barriers with thinner liners and new fill technology to maximize conductor volume (low line R) and minimize interface resistance (low via R).....	228
Figure 70: Introduction of Co CVD encapsulation and transition to Cobalt contacts and local interconnects.	229

Figure 71: Intel Interconnect stack as describes at IEDM 2017(left) and SEM cross-section (right) and features 12-metal interconnect layers with the bottom two made of cobalt. This is the first-time cobalt used in a high-volume production node.....	230
Figure 72: 10nm via structure filled with cobalt shows no seams.....	231
Figure 73: Apple A11 resp. A12 fabricated using TSMC 10 res. 7 nm showing the introduction of Co contacts (blue) with the TiN barrier at 7 nm (Apple A12).....	232
Figure 74: Applied Materials PVD/ALD/CVD-deposition solution for Cobalt fill.	232
Figure 75: Schematic representation of a buried power rail construct	234
Figure 76: Interconnect Scheme Using ALD Magnesium ilicide	235
Figure 77: The evolution of High-k / Metal Gate Transistors, from the first planar 45 nm to the 14 nm node.....	236
Figure 78: Comparison of CMOS Transistors used today. (A) Planar, (B) FD-SOI, and (C) FinFET..	237
Figure 79: Possible uses for dielectrics in state of the art 10 nm FinFET Technology: Low-k, High-k, liners, and even dielectric air gaps.....	238
Figure 80: Intel 10nm and Foundry 7nm Logic Process nodes compared.	239
Figure 81: After the introduction at 22 nm by Intel, taller fin height and narrower fin width leads to a more vertical profile in 14 nm and 10 nm.....	240
Figure 82: Schematic of partial air spacers (left), and TEM cross-section of FinFET gates, showing spacers between gates and contacts.	241
Figure 83: A GAA (gate-all-around) FET that could come into play at 5 or 3 nm.	242
Figure 84: Imec CMOS Roadmap to N1 and beyond.	243
Figure 85: Imec has achieved the CMOS integration of vertically stacked gate-all-around (GAA) silicon nanowire MOSFETs.....	244
Figure 86: Three principal Cross-section simulation of (a) finFET, (b) nanowire, and (c) nanosheet.	245
Figure 87: TEM cross-section of 5nm-node GAA-FETs by IBM, Samsung, and GlobalFoundries....	245
Figure 88: Leti roadmap for introducing monolithic 3D Logic scaling at 5 nm.....	247
Figure 89. Stacking FinFETs on FinFETs.....	248
Figure 90: Roadmap for 3D SoC and 3D Logic post 3nm CMOS node.....	249

Figure 91: Device integration for current and emerging memory technologies.....	250
Figure 92: DRAM capacitor development, historical.....	251
Figure 93: COVID-19 impact of the slowdown on different market segments.....	252
Figure 94: Cut through a graphics card that uses High Bandwidth Memory.....	254
Figure 95: Deep Trench Capacitors (DTCs) as eDRAM technology node and cell size trends from IBM up to date.....	255
Figure 96: The implications of the Transition to 3DNAND	256

TABLES

Table 1: TECHCET's Critical Materials Reports™.....	21
Table 2: Lockdown & Restrictions by Country (April 2020)	23
Table 3: Global GDP and Semiconductor Revenues	24
Table 4: IMF World Economic Outlook.....	25
Table 5: 2020 Auto Industry Growth Impact Factors	32
Table 6: Data Center Systems and Communication Services Forecast 2020	35
Table 7: Worldwide Device Shipments by Device Type, 2020-2022 (Jan 2020)	37
Table 8: 2019 Investment Plans for Selected Device Companies (as of March 2020)	40
Table 9: 2020/ 2019 Growth Estimates for 3DNAN, DRAM and Logic Devices (advanced nodes and leading edge)	45
Table 10: CVD and ALD OEM Technology as Product.	51
Table 12: Assessment of China's needs for advanced ALD/CVD Precursors	60
Table 13. 5-Year CAGR 2019 as compared to 2024 for advanced dielectric precursors.	64
Table 14: The Linde-Praxair Merger Divestment of Substantial Business Assets	68
Table 16: Throughput Immersion vs. EUV Lithography.....	224
Table 17:: OEM Tool Sets for Sub-5 nm Logic devices	246
Table 18: Critical thermal budget steps summary in a planar FDSOI integration and 3D CoolCube process for top FET in 3DVLSI.....	248

2 SCOPE, PURPOSE, AND METHODOLOGY

2.1 SCOPE

This report provides market and technical trend information on organic and inorganic gases, liquid and solid precursors addressing CVD, ALD, and SOD techniques. For the last 20 years, there have been a huge number of research papers and patents published regarding ALD and CVD precursors specifically for the semiconductor industry. The report covers in detail the long research and development path for new precursors; and the processes to pass EHS and regulatory hurdles for these materials to enter into high volume manufacturing (HVM).

The focus is for the leading-edge front end of the line, and insulating interconnect materials, including sacrificial layers, low-k dielectrics, hard masks, mandrel, and etch stop layers. These process areas are of interest because of the high growth potential associated with leading-edge logic <45 nm, 28 nm to 10/7 nm nodes, and the future 5 & 3 nm nodes, as well as advanced DRAM and 3DNAND volatile and non-volatile memories. New memory technologies like STT-MRAM, Resistive RAM, Ferroelectric RAM, and FETs and Cross Point Memory will emerge in the coming 5 years. Today the recent NAND transition to 3DNAND and continued vertical scaling will drive growth for metal and dielectric precursors.

2.2 PURPOSE

This Critical Materials Report (CMR™) provides focused information for supply-chain managers, process integration, and R&D directors, as well as business and financial analysts. The report covers information about key suppliers, issues/trends in the material supply chain, estimates on supplier market share, and forecast for the material segments.

2.3 METHODOLOGY

TECHCET employs subject matter experts having first-hand experience within the industries which they analyze. Most of TECHCET's analysts have over 25 years of direct and relevant experience in their field. Our analysts survey the commercial and technical staff of IC manufacturers and their suppliers and conduct extensive research of literature and commerce statistics to ascertain the current and future market environment and global supply risks. Combining this data with TECHCET's proprietary, quantitative wafer forecast results in a viable long-term market forecast for a variety of process materials.

2.4 OVERVIEW OF OTHER TECHCET CMR™ REPORTS

TECHCET produces electronic material supply chain reports each year as one of its functions for the Critical Materials Council. Reports to be published in 2020 can be found at www.techcet.com and are listed in the table below:

Table 1: TECHCET's Critical Materials Reports™

TECHCET Critical Materials Reports™
1. CMP Consumables (Slurry, Pads, Disks)
2. ALD/CVD Precursors (Metals & Dielectrics)
3. Equipment Components- Quartz
4. Equipment Components- Silicon, SiC, Ceramics
5. Gases- Electronic Specialty, Bulk, & Rare
6. Rare Earth Market
7. Photoresist, Ancillary, & Extensions
8. Silicon Wafers
9. Sputter Targets
10. Metal Chemicals
11. Wet Chemical
12. Roadmaps & Device Technology

8 SUPPLIER PROFILES

TABLE OF CONTENTS

1.	ADEKA Corporation	11
1.1.	ADEKA CORPORATION - Company Overview	11
1.2.	ADEKA CORPORATION -Business Segments	11
1.3.	ADEKA CORPORATION - Recent Company Specific News and New Product Offerings.....	13
1.4.	ADEKA CORPORATION - Regions Served.....	14
1.5.	ADEKA CORPORATION - Key Customers.....	14
1.6.	ADEKA CORPORATION - Fiscal Year Financial Overview	14
1.7.	ADEKA CORPORATION - Manufacturing Locations, Capabilities, and Certifications	15
1.8.	JVs and Partnerships.....	16
1.9.	Sales Reps and Distributors.....	16
1.10.	TECHCET Analyst Assessment	16
2.	Air Liquide (Maker, Purifier, Supplier)	17
2.1.	Air Liquide - Company Overview	17
2.2.	Air Liquide - Business Segments	18
2.3.	Air Liquide - Recent Company Specific News and New Product Offerings.....	18
3.	Air Liquide - Financial Overview.....	23
3.1.	Air Liquide - Manufacturing Locations, Capabilities, and Certifications	23
3.2.	JVs and Partnerships.....	24
3.3.	Sales Reps	24
3.4.	TECHCET Analyst Assessment.....	24
4.	AZmax Co., Ltd	25
4.1.	AZmax Co., Ltd. - Company Overview	25
4.2.	AZmax Co., Ltd.-Business Segments.....	25
4.3.	AZmax Co., Ltd.- Recent Company Specific News and New Product Offerings	26
4.4.	Azmax Co., Ltd. – Regions Served	26
4.5.	Azmax Co., Ltd.- Key Customers	26
4.6.	Azmax Co., Ltd.- Fiscal Year Financial Overview	26
4.7.	AZmax Co., Ltd.- Manufacturing Locations, Capabilities, and Certifications.....	26
4.8.	JVs and Partnerships.....	26

4.9. Sales Reps and Distributors.....	26
4.10. TECHCET Analyst Assessment	26
5. DNF Co., Ltd	27
5.1. DNF Co., Ltd - Company Overview	27
5.2. Business Segments – all electronics materials.....	27
5.3. Recent Company Specific News and New Product Offerings.....	28
5.4. Regions Served	29
5.5. Key Customers.....	29
5.6. JVs and Partnerships.....	30
5.7. Sales Reps and Distributors.....	30
5.8. TECHCET Analyst Assessment.....	30
6. Entegris.....	31
6.1. Entegris - Company Overview	31
6.2. ENTEGRIS - Business Segments.....	31
6.3. ENTEGRIS- Recent Company Specific News and New Product Offerings	33
6.4. ENTEGRIS - Regions Served	33
6.5. ENTEGRIS- Key Customers (especially electronics /chip companies)	34
6.6. ENTEGRIS- Fiscal Year Financial Overview.....	34
6.7. ENTEGRIS- Manufacturing Locations, Capabilities, and Certifications	35
6.8. JVs and Partnerships.....	35
6.9. Sales Reps and Distributors.....	36
6.10. TECHCET Analyst Assessment	36
7. Epivalence.....	37
7.1. EpiValence Ltd. - Company Overview	37
7.2. EpiValence Ltd.-Business Segments (put all biz segments and description, not just electronics)	
37	
7.3. EpiValence Ltd.- Recent Company Specific News and New Product Offerings	38
7.4. EpiValence Ltd.- Regions Served.....	38
7.5. EpiValence Ltd.- Key Customers (especially electronics /chip companies).....	38
7.6. EpiValence Ltd - Fiscal Year Financial Overview	39

7.7.	EpiValence Ltd - Manufacturing Locations, Capabilities, and Certifications (of electronic materials & related plants)	39
7.8.	JVs and Partnerships.....	39
7.9.	Sales Reps and Distributors.....	39
7.10.	TECHCET Analyst Assessment	39
8.	Gelest (under take over by Mitsubishi Chemical Corporation)	40
8.1.	Gelest Inc. - Company Overview.....	40
8.2.	Gelest Inc – Business Segments.....	40
8.3.	Gelest Inc. - Recent Company Specific News and New Product Offerings	41
8.4.	Gelest Inc.- Regions Served	42
8.5.	Gelest Inc.- Key Customers (especially electronics /chip companies)	42
8.6.	Gelest Inc. - Fiscal Year Financial Overview.....	42
8.7.	Gelest Inc. - Manufacturing Locations, Capabilities, and Certifications (of electronic materials & related plants).....	42
8.8.	JVs and Partnerships.....	42
8.9.	Sales Reps and Distributors.....	42
8.10.	TECHCET Analyst Assessment	43
9.	Hansol Chemical	44
9.1.	Hansol Chemical - Company Overview.....	44
9.2.	Hansol Chemical - Business Segments	44
9.3.	Hansol Chemical - Recent Company Specific News and New Product Offerings.....	45
9.4.	Hansol Chemical - Regions Served	45
9.5.	Hansol Chemical - Key Customers.....	45
9.6.	Hansol Chemical - Fiscal Year Financial Overview.....	46
9.7.	Hansol Chemical - Manufacturing Locations, Capabilities, and Certifications	46
9.8.	Hansol Chemical - JVs and Partnerships.....	47
9.9.	Hansol Chemical- Sales Reps and Distributors.....	47
9.10.	TECHCET Analyst Assessment	47
10.	H.C. Starck (sub-tier supplier)	48
10.1.	HC Stark-Company Overview	48
10.2.	HC Stark -Business Segments	48

10.3.	HC Stark -Recent Company Specific News and New Product Offerings.....	50
10.4.	HC Stark -Regions Served.....	51
10.5.	HC Stark -Key Customers	51
10.6.	HC Stark -Financial Overview	51
10.7.	HC Stark -Manufacturing Locations, Capabilities, and Certifications	51
10.8.	JVs and Partnerships	52
10.9.	Sales Reps	53
10.10.	TECHCET Analyst Assessment	53
11.	Kojundo	53
11.1.	Kojundo Chemical Laboratory Co., Ltd - Company Overview	53
11.2.	Kojundo Chemical Laboratory Co.,Ltd. -Business Segments.....	54
11.3.	Kojundo Chemical Laboratory Co.,Ltd. - Recent Company Specific News and New Product Offerings	54
11.4.	Kojundo Chemical Laboratory Co.,Ltd. – Regions Served.....	55
11.5.	Kojundo Chemical Laboratory Co.,Ltd. - Key Customers	55
11.6.	Kojundo Chemical Laboratory Co.,Ltd. - Fiscal Year Financial Overview	55
11.7.	Kojundo Chemical Laboratory Co.,Ltd. - Manufacturing Locations, Capabilities, and Certifications	55
11.8.	TECHCET Analyst Assessment	55
12.	Linde (Maker, Purifier, Supplier) – for Praxair Products see Sec. 18.....	56
12.1.	Linde- Company Overview (given that the merger w/ Praxair legally closed as of 31 October, 2018, information on the two companies will be reported here separately)	56
12.2.	Linde-Business Segments.....	57
12.3.	Linde- Recent Company Specific News and New Product Offerings	59
12.4.	Linde - Regions Served.....	62
12.5.	Linde- Fiscal Year Financial Overview (combined financials)	62
12.6.	Linde- Manufacturing Locations, Capabilities, and Certifications	63
12.7.	JVs and Partnerships	63
12.8.	Sales Reps and Distributors (Sales Offices) - Linde	64
12.9.	TECHCET Analyst Assessment	64
13.	Mecaro	65

13.1.	Mecaro- Company Overview	65
13.2.	Business Segments - all Electronic related materials	65
13.3.	Recent Company Specific News and New Product Offerings	66
13.4.	Regions Served.....	67
13.5.	Key Customers (especially electronics /chip companies).....	67
13.6.	Fiscal Year Financial Overview	68
13.7.	Manufacturing Locations, Capabilities, and Certifications (of electronic materials &related plants)	68
13.8.	JVs and Partnerships	69
13.9.	Sales Reps and Distributors	69
13.10.	TECHCET Analyst Assessment	70
14.	Merck EMD (for Versum products see Sec.26)	70
14.1.	Merck KGaA / EMD	70
14.2.	Merck KGaA / EMD - Business Seg	71
14.3.	Merck KGaA / EMD – Financial Overview	71
14.4.	Merck KGaA / EMD - News	71
14.5.	Merck KGaA / EMD - Key Customers	72
14.6.	Merck KGaA / EMD - Manufacturing Locations, Capabilities, and Certifications.....	72
14.7.	JVs and Partnerships	74
14.8.	Sales Reps and Distributors	74
14.9.	TECHCET Analyst Assessment	74
15.	Nanmat.....	77
15.1.	Nanmat -Company Overview	77
15.2.	Nanmat -Business Segments.....	77
15.3.	Nanmat -Recent Company Specific News and New Product Offerings	78
15.4.	Nanmat -Regions Served	78
15.5.	Nanmat -Key Customers	78
15.6.	Nanmat -Financial Overview.....	79
15.7.	Nanmat -Manufacturing Locations, Capabilities, and Certifications.....	79
15.8.	JVs and Partnerships	79
15.9.	Sales Reps	79

15.10.	TECHCET Analyst Assessment	80
16.	Norquay (ACquired by MPD that was aquired by Entegris)	80
16.1.	Norquay-Company Overview.....	80
16.2.	Norquay-Business Segments.....	80
16.3.	Norquay - Recent Company Specific News and New Product Offerings	83
16.4.	Norquay - Manufacturing Locations, Capabilities, and Certifications	83
16.5.	JVs and Partnerships	83
16.6.	Sales Reps.....	84
16.7.	TECHCET Analyst Assessment	84
17.	Pegasus Chemicals.....	85
17.1.	Pegasus Chemicals - Company Overview.....	85
17.2.	Pegasus Chemicals - Business Segments.....	85
17.3.	Pegasus Chemicals - Recent Company Specific News and New Product Offerings	85
17.4.	Pegasus Chemicals - Regions Served	86
17.5.	Pegasus Chemicals - Key Customers	86
17.6.	Pegasus Chemicals - Financial Overview.....	86
17.7.	Pegasus Chemicals - Manufacturing Locations, Capabilities, and Certifications	86
17.8.	JVs and Partnerships	86
17.9.	Sales Reps.....	86
17.10.	TECHCET Analyst Assessment	87
18.	Praxair (now a wholly owned subsidiary of Linde).....	87
18.1.	Praxair- Company Overview	87
18.2.	Praxair-Business Segments	87
18.3.	Praxair- Recent Company Specific News and New Product Offerings.....	88
18.4.	Praxair - Regions Served	90
18.5.	Praxair- Key Customers.....	90
18.6.	Praxair- Fiscal Year Financial Overview	90
18.7.	Praxair- Manufacturing Locations, Capabilities, and Certifications	91
18.8.	JVs and Partnerships	91
18.9.	Sales Reps and Distributors - Praxair	91
18.10.	TECHCET Analyst Assessment	92

19.	Soulbrain.....	92
19.1.	Soulbrain - Company Overview.....	92
19.2.	Business Segments	93
19.3.	Recent Company Specific News and New Product Offerings - Suzhou.....	94
19.4.	Regions Served - Suzhou.....	94
19.5.	Key Customers (especially electronics/chip companies) - Soulbrain	94
19.6.	Manufacturing Locations, Capabilities, and Certifications - Soulbrain.....	95
19.7.	JVs and Partnerships - Soulbrain	96
19.8.	No Sales Reps and Distributors Listed	96
19.9.	TECHCET Analyst Assessment	96
20.	Strem.....	97
20.1.	Strem - Company Overview	97
20.2.	Strem - Products.....	97
20.3.	Strem -Recent Company Specific News and New Product Offerings	98
20.4.	Strem -Regions Served.....	99
20.5.	Strem -Key Customers	99
20.6.	Strem - Financial Overview	99
20.7.	Strem - Manufacturing Locations, Capabilities, and Certifications	100
20.8.	JVs and Partnerships	100
20.9.	Sales Reps	100
20.10.	TECHCET Analyst Assessment	101
21.	Tanaka Kikinzoku Group	101
21.1.	Tanaka Kikinzoku Group - Company Overview	101
21.2.	Tanaka Kikinzoku Group -Business Segments	101
21.3.	Tanaka Kikinzoku Group - Recent Company Specific News and New Product Offerings....	102
21.4.	Tanaka Kikinzoku Group - Regions Served	103
21.5.	Tanaka Kikinzoku Group - Key Customers.....	103
21.6.	Tanaka Holdings - Fiscal Year Financial Overview	103
21.7.	Tanaka Kikinzoku Group - Manufacturing Locations, Capabilities, and Certifications	103
21.8.	JVs and Partnerships	104
21.9.	Sales Reps and Distributors	104

21.10.	TECHCET Analyst Assessment	105
22.	Tokyo Chemical Industry Co., Ltd.	105
22.1.	Tokyo Chemical Industry Co., Ltd. (TCI) - Company Overview.....	105
22.2.	TCI-Business Segments	106
22.3.	TCI- Recent Company Specific News and New Product Offerings.....	106
22.4.	TCI - Regions Served	107
22.5.	TCI- Key Customers.....	107
22.6.	TCI- Fiscal Year Financial Overview– All numbers to be reported in Fiscal Year	107
22.7.	TCI- Manufacturing Locations, Capabilities, and Certifications (of electronic materials & related plants).....	107
22.8.	JVs and Partnerships	108
22.9.	Sales Reps and Distributors	108
22.10.	TECHCET Analyst Assessment	108
23.	Tri Chemical Laboratories	108
23.1.	Tri Chemical Laboratories Inc.- Company Overview	108
23.2.	Tri Chemical Laboratories Inc.-Business Segments	108
23.3.	Tri Chemical Laboratories Inc.- Recent Company Specific News and New Product Offerings	110
23.4.	Tri Chemical Laboratories Inc. - Regions Served.....	110
23.5.	Tri Chemical Laboratories Inc.- Key Customers (especially electronics /chip companies) ..	110
23.6.	Tri Chemical Laboratories Inc.- Fiscal Year Financial Overview	111
23.7.	Tri Chemical Laboratories Inc.- Manufacturing Locations, Capabilities, and Certifications ..	112
23.8.	JVs and Partnerships	112
23.9.	Sales Reps and Distributors	112
23.10.	TECHCET Analyst Assessment	112
24.	Umicore	113
24.1.	Umicore - Company Overview	113
24.2.	Umicore - Business Segments	113
24.3.	Umicore - Recent Company Specific News and New Product Offerings	114
24.4.	Umicore - Regions Served	115
24.5.	Umicore - Key Customers.....	115

24.6.	Umicore - Financial Overview	115
24.7.	Umicore - Manufacturing Locations, Capabilities, and Certifications	116
24.8.	JVs and Partnerships	117
24.9.	Sales Reps.....	117
24.10.	TECHCET Analyst Assessment	117
25.	UP Chemical/ Yoke (China HQ).....	118
25.1.	UP Chemical Co., Ltd. - Company Overview	118
25.2.	Business Segments	118
25.3.	Recent Company Specific News and New Product Offerings	119
25.4.	Regions Served.....	119
25.5.	Key Customers	119
25.6.	Fiscal Year Financial Overview	119
25.7.	Manufacturing Locations, Capabilities, and Certifications	120
25.8.	JVs and Partnerships	120
25.9.	Client/Partners:.....	121
25.10.	Sales Reps and Distributors	121
25.11.	TECHCET Analyst Assessment	121
26.	VERSUM (Maker, Purifier, Supplier → Acquired by MERCK EMd).....	121
26.1.	Versum - Company Overview.....	121
26.2.	VERSUM - Business Segments	122
26.3.	VERSUM- Financial Overview.....	122
26.4.	VERSUM - News	123
26.5.	VERSUM- Key Customers	123
26.6.	VERSUM- Manufacturing Locations, Capabilities, and Certifications.....	123
26.7.	JVs and Partnerships	123
26.8.	Sales Reps and Distributors	123
26.9.	TECHCET Analyst Assessment	123
27.	Wonik Materials Co. Ltd.	123
27.1.	Wonik Materials - Company Overview	124
27.2.	Wonik Materials - Business Segments	124
27.3.	Wonik Materials - Recent Company Specific News and New Product Offerings	126

27.4.	Regions Served.....	126
27.5.	Wonik Materials - Key Customers	126
27.6.	Wonik Materials - Fiscal Year Financial Overview	127
27.7.	Wonik Materials - Manufacturing Locations, Capabilities, and Certifications (electronics related) 127	
27.8.	JVs and Partnerships - Wonik Materials	128
27.9.	No Sales Reps and Distributors Listed	129
27.10.	TECHCET Analyst Assessment	129
28.	Zillion Tek Co., Ltd	129
28.1.	Zillion Tek Co., Ltd. - Company Overview.....	129
28.2.	-Business Segments (put all biz segments and description, not just electronics)	130
28.3.	Electronic materials products offered:	131
28.4.	Recent Company Specific News and New Product Offerings	131
28.5.	Regions Served.....	132
28.6.	Key Customers (especially electronics /chip companies).....	132
28.7.	Fiscal Year Financial Overview	132
28.8.	Manufacturing Locations, Capabilities, and Certifications (of electronic materials &related plants) 132	
28.9.	JVs and Partnerships	133
28.10.	No Sales Reps and Distributors Listed	133
28.11.	TECHCET Analyst Assessment	133