

SPRING
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2020 TECHCET'S
CRITICAL MATERIALS REPORT™
SLURRY, PADS
AND CONDITIONING
DISK MARKETS
FOR SEMI-CONDUCTOR APPLICATIONS

Prepared by:

Diane Scott, PhD

Robert Rhoades, PhD

TECHCET CA LLC

11622 El Camino Real #100

San Diego, CA 92130

www.TECHCET.com

info@TECHCET.com

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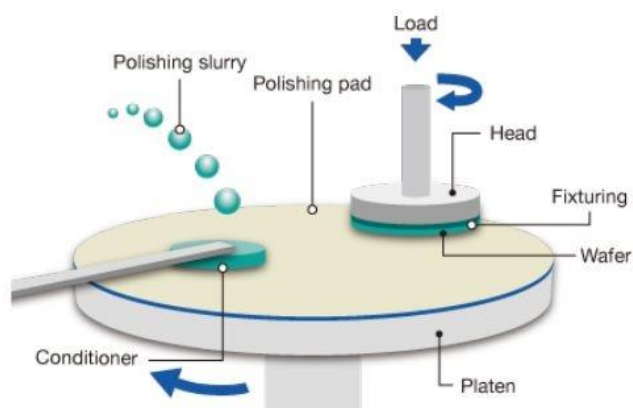
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2 SCOPE, PURPOSE AND METHODOLOGY

2.1 SCOPE

This report covers the CMP consumables market for slurry, pads and conditioning disks including the supply-chain for these materials used in semiconductor device fabrication. The report contains data and analysis from TECHCET's database and Senior Analyst experience, as well as that developed from primary and secondary market research. For more information on TECHCET Critical Materials Reports™ please visit to <https://TEHCET.com>

CMP for IC manufacturing has been in development and manufacturing since the mid 1980's. The process involves several consumable materials used on a piece of polishing equipment, as shown in the figure below. The main consumable materials are; abrasive slurry, polishing pads and the conditioning disks. This triad needs to work together to "polish" the surface bumps and topology from underlying layers that can cause yield-limiting problems for the IC process. CMP has continued to be one of the critical process steps that make ultra-flat and smooth surfaces to enable advanced electronic device manufacturing.



Like all mature material markets, one of the biggest challenges in the CMP consumable markets is the balance between cost and quality as the technology demands tighten. This new decade will see CMP continue to enable processes at smaller and smaller node levels and of newer and increasingly exotic thin film materials. There is no technology that may replace CMP in the foreseeable future.

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 development managers, 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

TEHCET employs subject matter experts having first-hand experience within the industries which they analyze. Most of TEHCET'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 TEHCET's proprietary, quantitative wafer start forecast results in a viable long-term market forecast for a variety of process materials.

2.4 OVERVIEW OF OTHER TEHCET CMR™ REPORTS

TEHCET produces electronic material supply chain reports each year as one of its functions for the Critical Materials Council. Reports to be published in 2019 can be found at www.techcet.com and are listed in the table below:

Table 2.1 2019 TEHCET Critical Material Reports

2019 - 2020 TEHCET 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



SECTION 9 SUPPLIER PROFILES

TEHCET CA LLC

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[www.techcet](http://www.techcet.com)

info@techcet.com

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