



**For Immediate Release**

## **CMP Pad & Slurry Revenues to Reach \$2.09B TEHCET Forecasts 4.3% Growth in 2016**

**San Diego, CA, September 13:** TECHCET CA—the advisory service firm providing electronics materials information—today announced that the chemical-mechanical planarization (CMP) slurry market is anticipated to grow almost 8% to total \$1.36B US for 2016, up from \$1.26B in 2015. The CMP pad market is expected to grow over 6.5% to total \$730M US for 2016, up from \$685M in 2015. The outlook for the next 5 years shows a growth rate of 4% to 6% for CMP consumables, with a near-term increase due to an increase in Capex spending in 2H2016. As detailed in the 2016 Critical Materials Report on CMP Consumables by TECHCET, CMP market growth exceeds growth in fab wafer starts because advanced IC devices require significantly more CMP processing.

The slurry market will experience a flurry of competitive activity this fall – due in large part to Cabot Microelectronic Corp.'s first tungsten slurry patent expiring this year. TECHCET anticipates active competition in the legacy tungsten slurry market featuring improved price and delivery, as other companies attempt to interest fabs in second source suppliers.

The pad market is being shaken up by improved pad conditioner technology, which increases pad life by two to three times. This will ultimately cause a decline in overall pad demand and corresponding supplier revenues unless the pad suppliers can justify higher prices. 3M has announced interesting new pad conditioning technology based on precisely engineered 3D micro-replicated ceramic structures coated with CVD diamond.

The year ahead in the CMP consumables market will see some more players dropping out, mergers and acquisitions, and new technology announcements in support of advanced nodes. These and other strategic developments will be covered in TECHCET Critical Materials quarterly updates.

TEHCET CA LLC is an advisory service firm focused on process materials supply-chains, electronic materials technology, and materials market analysis for the semiconductor, display, solar/PV, and LED industries. TECHCET has produced the SEMATECH Critical Material Reports since 2000, and in the last quarter has released new reports on ALD & High-K Metal Precursors, Sputter Targets, Photoresists & Extensions & Ancillaries, and Silicon Wafers. For additional information about these or other Critical Materials Reports or about CMC Fabs membership please visit [www.techcet.com](http://www.techcet.com) and [www.cmcfabs.org](http://www.cmcfabs.org).

Media Contact:  
Ed Korczynski  
[edk@techcet.com](mailto:edk@techcet.com)  
+1-480-382-8336 x 6

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