



Electronics Materials Information

WET CHEMICALS AND SPECIALTY CLEANING CHEMISTRIES

FOR SEMICONDUCTOR DEVICE
PROCESS APPLICATIONS

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2 SCOPE, PURPOSE AND METHODOLOGY

- **Scope:**
 - This report covers the wet chemicals market and supply-chain issues for such used in semiconductor device fabrication. The report contains data and analysis from TECHCET's data base and Sr. Analyst experience, as well as that developed from primary and secondary market research. For more information on TECHCET Critical materials Reports™ please go do <https://TEHCET.com>
- **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
- **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.

2.1

SCOPE

- This report covers the Wet Chemical and Specialty clean materials market and supply-chain for these materials used in semiconductor device fabrication. The report contains data and analysis from TECHCET's data base and Sr. Analyst experience, as well as that developed from primary and secondary market research. For more information on TECHCET Critical materials Reports™ please go to <https://TECHCET.com>
- The challenge for this year is the effect of the COVID-19 virus and impact on the total supply chain and logistics. Also, since the start of this year, oil prices have dived, and refineries are reducing capacity. The secondary effect is reduction in the feedstock for many of the chemicals covered in this report. Import/Exports and Logistic have slowed the production and delivery of products.

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.
- Providing current information and actionable content is the intent of the information contained within this report and the quarterly updates.
- As important as the supply side of the equations is the demand requirements of the market in terms of the economic variables, leading edge technology requirements and the wafer start forecast.

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 forecast results in a viable long-term market forecast for a variety of process materials.

2.4

OVERVIEW OF OTHER TECHCET 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:

2019 - 2020 TECHCET 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