



Electronics Materials Information

WAFER LEVEL METAL PLATING CHEMICALS

FOR FRONT END SEMICONDUCTOR
MANUFACTURING AND ADVANCED
PACKAGING APPLICATIONS 2021

Prepared By:

Terry A Francis

With contributions from

Dan Tracy, and Lita Shon-Roy

TECHCET CA LLC

11622 El Camino Real #100

San Diego, CA 92130

www.TECHCET.com

info@TECHCET.com

RESEARCH 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.

READER'S NOTE

This report represents the interpretation and analysis of information generally available to the public or released by responsible agencies or individuals. Data was obtained from sources considered reliable. However, accuracy or completeness is not guaranteed.



TERRY FRANCIS

Director of Technology & Sr. Analyst of TECHCET— covers metal chemicals and specialty wet cleans. His work experience includes CTO, Sr. Director, Technical application expert, process manager and engineering management from companies such as Matheson, Air Products, Applied Materials, Burroughs, NCR, AMI, and National Semiconductor. He has over 40 years of experience in the semiconductor industry and has managed businesses from \$2M to over \$100M in revenues. In addition, he is experienced in material, chemical, and electrical engineering as well as the R&D and development programs in the Chemical/OEM/IDM sectors in the microelectronic industry. He holds a M.B.A. from National University, and a B.A. in chemistry from Oregon State University.

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2 SCOPE, PURPOSE AND METHODOLOGY

2.1

SCOPE

- This report covers the Metal Chemicals market trends and supply-chain as it applied to **Advanced Packaging** (wafer level) and **Semiconductor Device Manufacturing** (damascene process).
- Included are forecasts for copper plating and additives, market shares, technical trends, and supplier profiles. Also included in the appendix is a supplier product comparison table of publicly available information on plating products used for advanced packaging.
- 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://TEHCET.com>

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.