

2021 TECHCET CRITICAL MATERIALS REPORT™

CMP CONSUMABLES –
SLURRY, PADS AND
CONDITIONING DISK MARKETS

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RESEARCH 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.

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.



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		Versum (Merck KGaA/EMD/AZ)	Nanophase Technologies Corporation
		Abrasive Technology	Precision Colloids
		Ehwa Diamond	Saint Gobain
		Kinik	Showa Denko
		Saesol Diamond	Solvay
		Shinhan Diamond Industrial Co.	UK ABRASIVES
		3M	Wacker Chemie AG

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ANALYST BIOGRAPHY



- Sarah is a senior analyst for TECHCET covering the CMP Consumable Market
- She has 25 years of experience in the semiconductor business
- Experience at equipment companies like Revasum and Strasbaugh
- She has experience in market research, product management, applications development, marketing communications, investor relations, and sales.
- She is a graduate of University of Oregon with BS in Science, Marketing and Finance

2 SCOPE, PURPOSE AND METHODOLOGY

2.1

SCOPE

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.

For a brief overview of the consumables used in CMP, see Appendix A.

2.2

PURPOSE

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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:

2021	CMR Report Schedule
1	CMP Pads and Slurry
2	Equipment Components – Quartz
3	Gases + Xeon / Neon
4	Photoresist
5	Precursors - Dielectric Precursors
6	Precursors - Hi K / ALD CVD Metal Precursors
7	Silicon Wafers
8	Specialty Cleaning Chems / Wet Chems
9	Equipment Components – Ceramics/SiC
10	Metal Chemicals
11	Targets
12	Equipment Components- Silicon 2020 version with 2021 forecast