

TECHCET

Electronics Materials Information



2023 TECHCET CRITICAL MATERIALS REPORT™

CMP ANCILLARIES: PAD
CONDITIONERS, PVA BRUSHES,
SLURRY FILTERS & RETAINING RINGS
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.

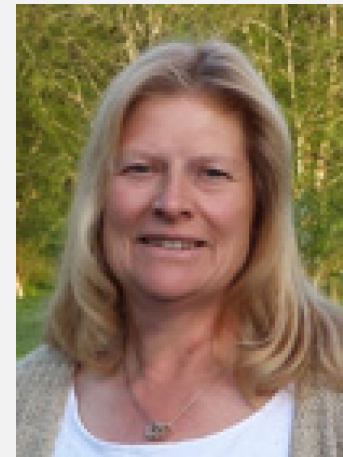
READER'S NOTE

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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Karey Holland, Ph.D.
Chief Strategist and
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SCOPE AND
METHODOLOGY

2.1 SCOPE

- This report looks at the market drivers for pad conditioners, retaining rings, slurry filters, and PVA brushes and forecasts by application market shares suppliers. 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>
- CMP processes are critical to semiconductor manufacturing as process integration requires the fabrication of thin and uniformly flat layers to build up device structures across the semiconductor wafers. The number of CMP process steps continue to increase with each generation of new device technology.
- New device technology is characterized by more layers new materials tighter process control requirements and new techniques for advanced packaging. These manufacturing challenges require new and continued optimization for CMP processes.