

**TEHCET**

Electronics Materials Information



# **2023-2024 CMR™ CVD/ALD/SOD DIELECTRIC PRECURSORS**

**Prepared By:**

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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.



## ANALYST BIOGRAPHY

Jonas Sundqvist, Ph.D. & Assoc. Prof. – Sr. Technology Analyst of TECHCET— covers Electronic Gases and ALD & CVD precursors and related technologies, and the co-chair of the Annual Critical Materials Council (CMC) Conference. His over 20 years of work experience includes Group Leader of the Thin-Film Technologies Group at The Fraunhofer Institute for Ceramic Technologies and Systems (IKTS) in Germany, Clean Room Operations Manager for Lund Nano Lab, Lund University in Sweden and Group Leader of the ALD & High-k devices group at Fraunhofer's Center Nanoelectronic Technologies (CNT) in Germany, which included 28nm node work for GLOBALFOUNDRIES Fab1.

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Jonas Sundqvist is Assoc. Prof. at Linköping University, on the Scientific Committee for AVS ALD and has co-chaired ALD2016 Dublin Ireland, and the annual EFDS ALD for Industry Workshop in Germany and Co-Chair for the annual CMC Conference.



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# TABLE OF CONTENTS

## 1 EXECUTIVE SUMMARY

- 1.1 REGIONAL TRENDS – DIELECTRIC PRECURSORS
- 1.2 PRECURSOR MARKET – HISTORICAL AND 5-YEAR FORECAST
- 1.3 DIELECTRIC PRECURSOR REVENUE 2021 TO 2027 (M USD)
- 1.4 TECHNOLOGY TRENDS DIELECTRIC PRECURSORS
- 1.5 CVD AND ALD EQUIPMENT MARKET
- 1.6 ANALYST ASSESSMENT – PRECURSORS

## 2 SCOPE, PURPOSE AND METHODOLOGY

- 2.1 SCOPE
- 2.2 PURPOSE
- 2.3 METHODOLOGY
- 2.4 OVERVIEW OF OTHER TECHCET CMR™ REPORTS

## 3 SEMICONDUCTOR INDUSTRY MARKET STATUS & OUTLOOK

- 3.1 WORLDWIDE ECONOMY
- 3.1.1 SEMICONDUCTOR INDUSTRIES TIES TO THE GLOBAL ECONOMY
- 3.1.2 SEMICONDUCTOR SALES GROWTH
- 3.1.3 TAIWAN MONTHLY SALES TRENDS
- 3.1.4 UNCERTAINTY ABOUNDS ESPECIALLY FOR 2023 - SLOWER TO NEGATIVE SEMICONDUCTOR REVENUE GROWTH EXPECTED

|    |   |    |
|----|---|----|
| 11 | 3.2 CHIPS SALES BY ELECTRONIC GOODS SEGMENT                     | 31 |
| 12 | 3.2.1 SMARTPHONES   | 32 |
| 13 | 3.2.2 PC UNIT SHIPMENTS   | 33 |
| 14 | 3.2.3 SERVERS / IT MARKET                                       | 36 |
| 15 | 3.3 SEMICONDUCTOR FABRICATION GROWTH & EXPANSION                | 37 |
| 16 | 3.3.1 FAB EXPANSION ANNOUNCEMENT SUMMARY                        | 38 |
| 17 | 3.3.2 WW FAB EXPANSION DRIVING GROWTH                           | 40 |
|    | 3.3.3 EQUIPMENT SPENDING TRENDS                                 | 41 |
| 19 | 3.3.4 TECHNOLOGY ROADMAPS                                       | 42 |
| 20 | 3.3.5 FAB INVESTMENT ASSESSMENT                                 | 43 |
| 21 | 3.4 POLICY & TRADE TRENDS AND IMPACT                            | 44 |
| 22 | 3.5 SEMICONDUCTOR MATERIALS OVERVIEW                            | 45 |
| 23 | 3.5.1 COULD MATERIALS CAPACITY LIMIT CHIP PRODUCTION SCHEDULES? | 46 |
|    | 3.5.2 LOGISTICS ISSUES EASED DOWN                               | 47 |
| 24 | 3.5.3 TECHCET WAFER STARTS FORECAST THROUGH 2027                | 48 |
| 25 | 3.5.4 TECHCET'S MATERIAL FORECAST                               | 49 |
| 27 |   |    |
| 28 |   |    |
| 29 |   |    |
| 30 |   |    |

# TABLE OF CONTENTS

|   |           |  |     |
|---|-----------|--|-----|
| <b>4 PRECURSOR MARKET TRENDS</b>  | <b>50</b> |  |     |
| 4.1 MARKET TRENDS   | 51        | 4.6.4 3D NAND NODE HVM ESTIMATE  | 78  |
| 4.1.1 MARKET TRENDS – WAFER STARTS  | 53        | 4.6.5 SUMMARY OF OPPORTUNITIES BY DEVICE SEGMENT   | 83  |
| 4.1.2 MARKET TRENDS – WAFER STARTS LOGIC                                  | 54        | 4.7 SEMICONDUCTOR PROCESS & MATERIALS TRENDS   | 84  |
| 4.1.3 MARKET TRENDS – WAFER STARTS DRAM                                   | 55        | 4.7.1 ETCH PROCESS BY DEVICE TYPE—ATOMIC LAYER ETCHING ALE   | 85  |
| 4.1.4 MARKET TRENDS – WAFER STARTS NAND                                   | 56        | 4.7.2 AREA SELECTIVE DEPOSITION  | 95  |
| 4.2 SUPPLY CAPACITY AND DEMAND, INVESTMENTS                               | 57        | 4.7.3 DIRECTED SELF ASSEMBLY (DSA) AND EUV   | 96  |
| 4.2.1 WF6 DEMAND DRIVERS  | 59        | 4.7.4 DIRECT SELF ASSEMBLY (DSA) AND EUV   | 97  |
| 4.3 SUPPLY CAPACITY AND DEMAND, INVESTMENTS                               | 60        | 4.7.5 2D TRANSITION METAL DICHALCOGENIDES (TMD)  | 98  |
| 4.4 REGIONAL TRENDS – DIELECTRIC PRECURSORS                               | 61        | 4.7.6 DRY RESIST FOR EUV   | 99  |
| 4.4.1 REGIONAL TRENDS AND DRIVERS   | 62        | 4.7.7 UNDERLAYERS FOR EUV RESIST   | 102 |
| 4.5 CVD AND ALD EQUIPMENT MARKET  | 64        | 4.7.8 OTHER APPLICATIONS – OPTICS  | 104 |
| 4.5.1 WFE FORECAST: ALL TYPES   | 65        | 4.8 EHS AND LOGISTIC ISSUES  | 105 |
| 4.5.2 WFE FORECAST: DEPOSITION, ETCH & CLEAN, LITHOGRAPHY, METROLOGY ETC. | 66        | 4.8.1 GREEN HOUSE GASES FROM SEMICONDUCTOR PRODUCTION  | 106 |
| 4.6 TECHNICAL DRIVERS / MATERIAL CHANGES AND TRANSITIONS BY DEVICE TYPE   | 67        | 4.8.2 EUV AND ENERGY   | 109 |
| 4.6.1 GENERAL TREND LAST DECADE GOING FROM PVD & LPCVD TO PECVD & ALD     | 68        | 4.8.3 ASSESSING THE ENVIRONMENTAL IMPACT OF ATOMIC LAYER DEPOSITION (ALD) PROCESSES AND PATHWAYS TO LOWER IT | 110 |
| 4.6.2 ADVANCED LOGIC NODE HVM ESTIMATE                                    | 69        | 4.9 CHANGES IN STANDARD PACKAGING/VALVE TYPES  | 111 |
| 4.6.3 DRAM NODE HVM ESTIMATE  | 75        |  |     |

# TABLE OF CONTENTS

## 5 SEGMENT MARKET STATISTICS & FORECASTS

|   |     |
|---|-----|
| 5.1 PRECURSOR MARKET – HISTORICAL AND 5-YEAR FORECAST | 112 |
| 5.2 DIELECTRIC PRECURSOR REVENUE 2021 TO 2027 (M USD) | 113 |
| 5.2.1 ASSESSMENT DIELECTRIC PRECURSORS                | 114 |
| 5.3 M&A ACTIVITIES                                    | 115 |
| 5.3.1 M&A ACTIVITIES – MERCK & MECARO                 | 117 |
| 5.4 NEW PLANTS  | 118 |
| 5.5 SUPPLIER PLANT CLOSURES – NONE REPORTED           | 119 |
| 5.6 NEW ENTRANTS – DRY RESIST CONSORTIUM              | 124 |
|   | 125 |

## 6 SUB TIER MATERIAL SUPPLY CHAIN

|  |     |
|--|-----|
| 6.1 SUB-TIER SUPPLY-CHAIN: INTRODUCTION                      | 126 |
| 6.2 LOGISTICS  | 127 |
| 6.2.1 LOGISTICS, CONTINUED                                   | 128 |
| 6.3 SUB-TIER SUPPLY-CHAIN “NEW” ENTRANTS - NONE REPORTED     | 129 |
| 6.4 SUB-TIER SUPPLY-CHAIN PLANTS UPDATES-NEW – NONE REPORTED | 130 |
| 6.5 SUB-TIER SUPPLY-CHAIN TECHCET ANALYST ASSESSMENT         | 131 |
|  | 132 |

## 7 SUPPLIER PROFILES

|   |     |
|---|-----|
| ADEKA CORPORATION                       | 133 |
| AIR LIQUIDE (MAKER, PURIFIER, SUPPLIER) |     |
| AZMAX CO., LTD                          |     |
| CITY CHEMICAL LLC                       |     |
| DNF CO., LTD                            |     |
| ...and 20+ more                         |     |

# FIGURES & TABLES

## FIGURES

|  |    |   |    |
|--|----|---|----|
| FIGURE 1: HARDMASK, LOW K DIELECTRIC PRECURSORS REGIONAL SHARES 2022 | 12 | FIGURE 17: GLOBAL TOTAL EQUIPMENT SPENDING BY SEGMENT (US\$ B)                                  | 41 |
| FIGURE 2: TOTAL PRECURSOR MARKET, M USD                              | 13 | FIGURE 18: OVERVIEW OF ADVANCED LOGIC DEVICE TECHNOLOGY ROADMAP                                 | 42 |
| FIGURE 3: DIELECTRIC PRECURSOR MARKET 2021 TO 2027                   | 14 | FIGURE 19: INTEL OHIO PLANT SITE FEB. 2023 AND ARTIST RENDERING (ON BOTTOM)                     | 43 |
| FIGURE 4: CVD AND ALD TOTAL EQUIPMENT MARKET 2022 USD 17-18 BILLION  | 16 | FIGURE 20: EUROPE CHIP EXPANSION UPSIDE   | 46 |
| FIGURE 5: GLOBAL ECONOMY AND THE ELECTRONICS SUPPLY CHAIN (2022)     | 27 | FIGURE 21: PORT OF LA   | 47 |
| FIGURE 6: WORLDWIDE SEMICONDUCTOR SALES                              | 28 | FIGURE 22: TECHCET WAFER START FORECAST BY NODE SEGMENTS**                                      | 48 |
| FIGURE 7: TECHCET'S TAIWAN SEMICONDUCTOR INDUSTRY INDEX (TTSI)*      | 29 | FIGURE 23: GLOBAL SEMICONDUCTOR MATERIALS OUTLOOK   | 49 |
| FIGURE 8: 2023 SEMICONDUCTOR INDUSTRY REVENUE GROWTH FORECASTS       | 30 | FIGURE 24: FORECASTS – WAFER STARTS 2021 TO 2027  | 53 |
| FIGURE 9: 2022 SEMICONDUCTOR CHIP APPLICATIONS                       | 31 | FIGURE 25: FORECASTS – WAFER STARTS LOGIC 300 MM  | 54 |
| FIGURE 10: MOBILE PHONE SHIPMENTS WW ESTIMATES                       | 32 | FIGURE 26: FORECASTS – WAFER STARTS DRAM 300 MM   | 55 |
| FIGURE 11: WORLDWIDE PC AND TABLET FORECAST                          | 33 | FIGURE 27: FORECASTS – WAFER STARTS NAND 300 MM   | 56 |
| FIGURE 12: ELECTRIFICATION TREND BY WORLD REGION                     | 34 | FIGURE 28: 3DNAND MARKET SHARE 2022   | 59 |
| FIGURE 13: SEMICONDUCTOR AUTOMOTIVE PRODUCTION                       | 35 | FIGURE 29: HARDMASK, LOW K DIELECTRIC PRECURSORS REGIONAL SHARES 2022                           | 61 |
| FIGURE 14: TSMC PHOENIX INVESTMENT ESTIMATED WILL BE US \$40 B       | 37 | FIGURE 30: CVD AND ALD TOTAL EQUIPMENT MARKET 2022 USD 17-18 BILLION                            | 64 |
| FIGURE 15: CHIP EXPANSIONS 2022-2027 US\$366 B                       | 38 | FIGURE 31: SEMI 2022 SEMICONDUCTOR EQUIPMENT FORECAST   | 65 |
| FIGURE 16: SEMICONDUCTOR CHIP MANUFACTURING REGIONS OF THE WORLD     | 40 | FIGURE 32: 2022 TECHINSIGHTS WFE SPENDING (TOP) AND 2022 GARTNER WFE SPENDING PER NODE (BOTTOM) | 66 |
|  |    | FIGURE 33: 3D DEVICE ARCHITECTURES  | 68 |

# FIGURES & TABLES

|   |    |   |     |
|---|----|---|-----|
| FIGURE 34: LOGIC TECHNOLOGY NODE ROADMAP FOR LEADING IDMS   | 69 | FIGURE 50: LAM ALE PROCESS  | 90  |
| FIGURE 35: SAMSUNG START 3 NM PILOT RAMP USING GAA-FET TECHNOLOGY JUNE 2022                                     | 70 | FIGURE 51: ALD / ALE PROCESS ROADMAP  | 91  |
| FIGURE 36: IMEC 2022 LOGIC ROADMAP  | 71 | FIGURE 52: ALE PATENT ACTIVITY BY COMPANY THROUGH 2022                                      | 92  |
| FIGURE 37: SCALING AND LITHOGRAPHY TRENDS – A HIGH COST IN CAPITAL EXPENDITURE, ENERGY AND EMISSIONS            | 72 | FIGURE 53: AREA SELECTIVE SIN DEPOSITION BY ALD (AVS ASD2022)                               | 95  |
| FIGURE 38: APPLIED MATERIALS CENTURA PATTERN SHAPING CLUSTER  | 73 | FIGURE 54: DSA AND EUS PROCESSES  | 96  |
| FIGURE 39: DRAM TECHNOLOGY ROADMAP FOR LEADING IDMS   | 75 | FIGURE 55: RESIST RECTIFICATION WITH DSA  | 97  |
| FIGURE 40: IP FILING IN THE FIELD OF 3DRAM IS ACCELERATING  | 76 | FIGURE 56: TEM AND ARTIST RENDERING OF MONOLAYER CHANNEL FORMATION                          | 98  |
| FIGURE 41: NAND TECHNOLOGY ROADMAP FOR LEADING IDMS   | 78 | FIGURE 57: EUV LITHOGRAPHY ENABLING GATE STRUCTURES AND PITCH SCALING                       | 99  |
| FIGURE 42: PATHWAYS FOR CONTINUED 3D NAND SCALING   | 79 | FIGURE 58: DRY RESIST FOR EUV SEM IMAGE   | 100 |
| FIGURE 43: 3DNAND STACK TRENDS FROM <100L TO 4 STACKS   | 80 | FIGURE 59: SPIN ON CARBON (SOC) DIELECTRIC FOR EUV METAL OXIDE RESISTS PATTERNS AFTER LITHO | 101 |
| FIGURE 44: MEMORY STACK CHALLENGES FOR V-NAND   | 81 | FIGURE 60: UNDERLAYER (DIELECTRIC) HARDMASKS TRENDS FOR HIGH NA EUV                         | 102 |
| FIGURE 45A: FINFET TO GAA TRANSISTOR DIAGRAMS SHOWING SELECTIVE ETCHING IS NEEDED TO ADD RESS DEVICE COMPLEXITY | 85 | FIGURE 61: SPIN ON PRIMER (SOC) VS. HMDS PRIMER   | 103 |
| FIGURE 45B: ALE PROCESS CYCLE   | 85 | FIGURE 62: GREENHOUSE GAS CONTRIBUTIONS OF CHIP FAB MATERIALS AND EQUIPMENT                 | 106 |
| FIGURE 46: PERIOD TABLE INDICATING CANDIDATES FOR ALE (ISOTROPIC ETCHING)                                       | 86 | FIGURE 63: ENVIRONMENTAL IMPACT (GWP) OF VARIOUS PROCESSES AND GASES                        | 107 |
| FIGURE 47: APPLICATION OF ALE (ISOTROPIC ETCH)  | 87 | FIGURE 64: CO2EQ OUTPUT FROM ETCH GASES   | 108 |
| FIGURE 48: ALD AND ALE COMBO PROCESS  | 88 | FIGURE 65: TOTAL EMISSIONS AND ENERGY USE PROJECTION PER LOGIC NODE                         | 109 |
| FIGURE 49: PLASMA AND THERMAL ALE PROCESSES   | 89 |   |     |



## FIGURES & TABLES

|  |     |
|--|-----|
| FIGURE 66: ENVIRONMENTAL IMPACT OF ALD   | 110 |
| FIGURE 67: SEGMENTATION OF THE AMPOULE FLEET 2020 BASED ON<br>NUMBER OF UNITS IN THE FIELD | 111 |
| FIGURE 68: TOTAL PRECURSOR MARKET, M USD   | 113 |
| FIGURE 69: DIELECTRIC PRECURSOR MARKET 2021 TO 2027  | 114 |
| FIGURE 70: TEOS  | 116 |
| FIGURE 71: WHAT IS EUV DRY RESIST?   | 125 |
| FIGURE 72: TYPICAL NON-HALIDE LIGANDS USED FOR ALD PRECURSORS                              | 127 |
| FIGURE 73: EXAMPLES OF PRECURSORS SUPPLIED BY SHIP   | 128 |
| FIGURE 74: OCEAN CONTAINER PRICE INDEX - JULY '20 TO MARCH '23                             | 129 |

# FIGURES & TABLES

## TABLES

|  |     |
|--|-----|
| TABLE 1: DIELECTRIC PRECURSOR REVENUES BY REGION (US\$ M)                                  | 12  |
| TABLE 2: 2017 TO 2027 5-YEAR CAGRS   | 13  |
| TABLE 3: GLOBAL GDP AND SEMICONDUCTOR REVENUES*  | 25  |
| TABLE 4: IMF ECONOMIC OUTLOOK*   | 26  |
| TABLE 5: DATA CENTER SYSTEMS AND COMMUNICATION SERVICES<br>MARKET SPENDING 2022            | 36  |
| TABLE 6: DIELECTRIC PRECURSOR MARKET SIZE BY REGION  | 61  |
| TABLE 7: REGIONAL WAFER MARKETS  | 62  |
| TABLE 8: REGIONAL PRECURSOR MARKETS  | 63  |
| TABLE 9: OVERVIEW OF DEPOSITION PROCESSES BY DEVICE TYPE<br>AND MATERIAL FOR LOGIC DEVICES | 74  |
| TABLE 10: OVERVIEW OF DEPOSITION PROCESSES BY DEVICE TYPE<br>AND MATERIAL FOR DRAM         | 77  |
| TABLE 11: OVERVIEW OF DEPOSITION PROCESSES BY DEVICE TYPE<br>AND MATERIAL FOR 3DNAND       | 82  |
| TABLE 12: GAS TRENDS AND OPPORTUNITIES BY DEVICE TYPE                                      | 83  |
| TABLE 13: PRECURSOR 5-YEAR CAGR COMPARISON   | 113 |

# 2

## SCOPE, PURPOSE AND METHODOLOGY

## 2.1 SCOPE

- This report provides market and technical trend information CVD/ALD dielectric and SOD precursors. For the last 20 years, there have been many research papers and patents published regarding ALD and CVD precursors specifically for the semiconductor industry. This report includes detail on the development path and roadmaps for new precursors and any current EHS and regulatory hurdles for these materials to enter into high volume manufacturing (HVM).
- Forecasts are provided on precursors of all types, with a focus is on the leading-edge front end of the line insulating and conductive materials, including sacrificial layers, low-k dielectrics, hard masks, mandrel, and etch stop layers. These process areas are of interest because of the high growth potential associated with leading-edge logic <45 nm, 28 nm to 10/7 nm nodes, and the future 5 & 3 nm nodes, as well as advanced DRAM and 3DNAND volatile and non-volatile memories.

## 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.

## 2.3 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.

## 2.4 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 2022 can be found at [www.techcet.com](http://www.techcet.com) and are listed in the table below:

| TEHCET's Critical Materials Reports™ |   |
|--------------------------------------|---|
| 1                                    | CMP Consumables (Pads & Slurry)   |
| 2                                    | CMP Equipment Ancillaries (Conditioners, Filters, etc.)                 |
| 3                                    | CVD /ALD Hi K Precursors  |
| 4                                    | CVD DIELECTRIC Precursors   |
| 5                                    | Equipment Components – Quartz   |
| 6                                    | Equipment Components – Silicon  |
| 7                                    | Equipment Components – SiC/Ceramics                                     |
| 8                                    | Gases - Electronic Specialty, Bulk & Rare Gases                         |
| 9                                    | Metal Plating Chemicals   |
| 10                                   | Photoresists, Ancillaries & Extension Materials                         |
| 11                                   | Sputtering Targets  |
| 12                                   | Wafers: Silicon, SOI  |
| 13                                   | SiC Wafers & Manufacturing  |
| 14                                   | Wet Chemicals / Specialty Cleans  |
| 15                                   | Special Reports: Impact of US Expansions on Wet Chemicals Supply Chains |