

**TEHCET**

Electronics Materials Information



# 2024-2025 CMR™ ALD/CVD, HI-K AND METAL PRECURSOR

SUPPLY-CHAIN & MARKET ANALYSIS  
A CRITICAL MATERIALS REPORT™

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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.

All market shares, revenue and volume numbers represented in the report are estimates only. Many of these companies do not report actual revenues or volumes per segment.

## ANALYST BIOGRAPHY

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Senior Analyst for CVD, ALD Dielectric Precursors and Deposition and Etch Equipment

Jonas Sundqvist is an accomplished professional with a background in inorganic chemistry and semiconductor wafer processing. He received his PhD from Uppsala University and has made significant contributions in the field of thin film deposition processes. Dr. Sundqvist's expertise spans research, development, and practical applications in the semiconductor industry, including Etch, Epi, ALD and CVD processes, market insights, and co-founding AlixLabs, a company focused on innovative Atomic Layer Etch technology solutions

In 2003, he joined Infineon Memory Development Centre (MDC) as a process engineer, focusing on high-k and metal nitride ALD processes. Later, at Qimonda (2006), he was part of the Materials Management team, responsible for precursor procurement and acquisition, with a specific emphasis on ALD precursors for DRAM development and production. In 2009, Dr. Sundqvist joined Fraunhofer CNT as a group leader and expert in thin film deposition, emphasizing high-k dielectrics and electrode materials for Memory and CMOS. CEO of AlixLabs since 2020.

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# TABLE OF CONTENTS

<b>1 EXECUTIVE SUMMARY</b>	<b>12</b>		
1.1 PRECURSORS BUSINESS – MARKET OVERVIEW	13		
1.2 PRECURSORS MARKET TRENDS IMPACTING 2024 OUTLOOK	14		
1.3 5-YEAR UNIT SHIPMENT FORECAST BY SEGMENT: METAL AND HIGH-K PRECURSORS	15		
1.4 PRECURSOR TRENDS	16		
1.5 PRECURSOR TECHNOLOGY TRENDS	17		
1.6 COMPETITIVE LANDSCAPE METAL & HIGH-K PRECURSORS	18		
1.7 PRECURSOR EHS, TRADE, AND/OR LOGISTICS ISSUES/CONCERNS	19		
1.8 ANALYST ASSESSMENT OF METAL AND HIGH-K PRECURSORS	20		
<b>2 SCOPE, PURPOSE AND METHODOLOGY</b>	<b>21</b>		
2.1 SCOPE	22		
2.2 METHODOLOGY	23		
2.3 OVERVIEW OF OTHER TECHCET CMR™ OFFERINGS	24		
<b>3 SEMICONDUCTOR INDUSTRY MARKET STATUS &amp; OUTLOOK</b>	<b>25</b>		
3.1 WORLDWIDE ECONOMY AND OUTLOOK	26		
3.1.1 SEMICONDUCTOR INDUSTRIES TIES TO THE GLOBAL ECONOMY	28		
3.1.2 SEMICONDUCTOR SALES GROWTH	29		
3.1.3 TAIWAN OUTSOURCE MANUFACTURER MONTHLY SALES TRENDS	30		
3.2 CHIPS SALES BY ELECTRONIC GOODS SEGMENT	31		
3.2.1 ELECTRONICS OUTLOOK	32		
3.2.2 AUTOMOTIVE INDUSTRY OUTLOOK	33		
3.2.2.1 ELECTRIC VEHICLE (EV) MARKET TRENDS	34		
3.2.2.2 INCREASE IN SEMICONDUCTOR CONTENT FOR AUTOS	35		
3.2.3 SMARTPHONE OUTLOOK	36		
3.2.4 PC OUTLOOK			37
3.2.5 SERVERS / IT MARKET			38
3.3 SEMICONDUCTOR FABRICATION GROWTH & EXPANSION			39
3.3.1 IN THE MIDST OF HUGE INVESTMENT IN CHIP EXPANSIONS			40
3.3.2 NEW FABs IN THE US			41
3.3.3 WW FAB EXPANSION DRIVING GROWTH			42
3.3.4 EQUIPMENT SPENDING TRENDS			43
3.3.5 ADVANCED LOGIC TECHNOLOGY ROADMAPS			44
3.3.5.1 DRAM TECHNOLOGY ROADMAPS			45
3.3.5.2 3D NAND TECHNOLOGY ROADMAPS			46
3.3.6 FAB INVESTMENT ASSESSMENT			47
3.4 POLICY & TRADE TRENDS AND IMPACT			48
3.5 SEMICONDUCTOR MATERIALS OVERVIEW			49
3.5.1 TECHCET WAFER STARTS FORECAST THROUGH 2028			50
3.5.2 TECHCET MATERIALS MARKET FORECAST THROUGH 2028			51
<b>4 MATERIAL MARKET TRENDS</b>			<b>52</b>
4.1 CVD, ALD METAL & HIGH-K AND ADVANCED DIELECTRIC PRECURSORS MARKET TRENDS			53
4.1.1 2023 PRECURSOR MARKET LEADING INTO 2024			54
4.1.2 PRECURSOR MARKET OUTLOOK			55
4.1.3 METAL AND HIGH-K PRECURSORS 5-YEAR UNIT SHIPMENT FORECAST BY SEGMENT			56
4.2 PRECURSORS SUPPLY CAPACITY AND DEMAND, INVESTMENTS			57
4.2.1 METAL & HIGH-K PRECURSOR PRODUCTION CAPACITY OF TOP SUPPLIERS			58

# TABLE OF CONTENTS

4.2.2 METAL & HIGH-K PRODUCTION BY REGION	59	4.4.14 ADVANCING TECHNOLOGIES IMPLICATION TO PHOTOLITHOGRAPHY	81
4.2.3 ALD/CVD MATERIAL PRODUCTION CAPACITY EXPANSIONS	60	4.4.14.1 ADVANCING TECHNOLOGIES IMPLICATION TO PHOTOLITHOGRAPHY – DSA	82
4.2.4 INVESTMENT ANNOUNCEMENTS OVERVIEW	62	4.4.14.2 ADVANCING TECHNOLOGIES IMPLICATION TO PHOTOLITHOGRAPHY: CENTURA SCULPTA BY APPLIED MATERIALS: SHAPING THE FUTURE OF SEMICONDUCTOR MANUFACTURING	84
4.2.5 PRECURSORS SUPPLY VS. DEMAND BALANCE – OVERVIEW	63	4.4.14.3 ADVANCING TECHNOLOGIES IMPLICATION TO PHOTOLITHOGRAPHY: LINE EDGE ROUGHNESS REDUCTION THRU DEPOSITION	85
4.3 PRICING TRENDS	64	4.4.15 CFET ARCHITECTURE: CFET SCALING ADVANTAGE	86
4.4 TECHNOLOGY TRENDS/TECHNICAL DRIVERS - OUTLINE	65	4.4.15.1 CFET ARCHITECTURE: COMPLEMENTARY FETS (CFETS)	87
4.4.1 PRECURSOR GENERAL TECHNOLOGY OVERVIEW & TECHNOLOGY TRENDS	66	4.4.15.2 CFET ARCHITECTURE: CFET FUTURE PROSPECTS	90
4.4.2 CUSTOMER DRIVEN TECHNOLOGIES	67	4.4.16 INORGANIC EUV RESIST – ALD DEPOSITED	92
4.4.3 NAND ROADMAPS AND CHALLENGES - 3D NAND LEVELS W/ STACKS/TIERS	68	4.4.17 MOLECULAR LAYER DEPOSITION (MLD)	93
4.4.4 3D NAND PROCESS ADVANCES REQUIRED	69	4.4.17.1 TREND IS MLD COMBINED WITH ALD	94
4.4.5 NEW MATERIALS AND ETCH CHEMISTRIES ENABLE 3D NAND SCALING – PF3(G) AND MOO2CL2(S)	70	4.4.17.2 DIFFERENT TYPES OF MLD PRECURSORS AND MATERIALS	95
4.4.6 MOLYBDENUM: THE NEW FRONTIER IN SEMICONDUCTOR METALLIZATION ACCORDING TO LAM RESEARCH	71	4.4.17.3 MLD APPLICATIONS	96
4.4.7 DRAM PROCESS ADVANCES REQUIRED	72	4.4.18 AREA SELECTIVE DEPOSITION (ASD)	97
4.4.8 DRAM FUTURE TECHNOLOGY CHALLENGES	73	4.4.18.1 AREA SELECTIVE DEPOSITION (ASD) – ADEKA PRESENT ASD HF-PRECURSOR	98
4.4.9 MICRON UNVEILS BREAKTHROUGH NVDRAM: A DUAL-LAYER 32GBIT NON-VOLATILE FERROELECTRIC MEMORY WITH NEAR-DRAM PERFORMANCE	74	4.4.18.2 AREA SELECTIVE DEPOSITION (ASD) – TU EINDHOVEN SELECTIVE ALD ENABLED BY PLASMA PRETREATMENT	99
4.4.10 ADVANCED LOGIC ROADMAPS AND CHALLENGES – LOGIC TRANSISTOR EST. ROADMAP	75	4.4.20 SPECIALTY/EMERGING METAL AND APPLICATIONS	100
4.4.11 ADVANCED LOGIC (FOUNDRY) NODE HVM ESTIMATE	76		
4.4.12 ADV LOGIC PROCESS ADVANCES REQUIRED	77		
4.4.12.1 THE SEMICONDUCTOR SHOWDOWN: SAMSUNG AND TSMC'S GAA FETS VS. INTEL'S RIBBONFET	78		
4.4.13 ADV LOGIC FUTURE TECHNOLOGY CHALLENGES	79		

# TABLE OF CONTENTS

4.4.21 SPECIALTY/EMERGING HIGH-K AND APPLICATIONS	101	5.4.2 A NEW ZR PRECURSOR WAFER-SCALE ZIRCONIUM DIOXIDE FILMS	129
4.5 REGIONAL CONSIDERATIONS – METAL AND HIGH-K	102	5.4.3 ADVANCES IN MOLYBDENUM THIN FILMS: NEW LIQUID PRECURSORS BOOST VAPOR PHASE DEPOSITION	130
4.5.1 REGIONAL ASPECTS AND DRIVERS	103	5.4.4 HANWHA TO SUPPLY ALD EQUIPMENT FOR MOLYBDENUM DEPOSITION FOR MEMORY APPLICATIONS	131
4.6 EHS AND TRADE/LOGISTIC ISSUES – METALS, HIGH-K AND DIELECTRICS	105	5.5 SUPPLIERS OR PARTS/PRODUCT LINES THAT ARE AT RISK OF DISCONTINUATIONS	132
4.6.1 ESH METALS	106	5.6 TECHCET ANALYST ASSESSMENT OF PRECURSOR SUPPLIERS	133
4.6.2 ESH HIGH-K	107	<b>6 SUB-TIER SUPPLY-CHAIN, PRECURSORS</b>	<b>134</b>
4.6.3 ESH RECYCLING	108	6.1 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW	135
4.7 TRADE/LOGISTICS ISSUES – METAL MATERIALS	109	6.1.1 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW – TIER 2 EXAMPLES NOURYON AND GELEST	136
4.7.1 TRADE/LOGISTICS ISSUES – HIGH-K MATERIALS	110	6.1.2 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW – CHEMICAL & GAS MANAGEMENT SYSTEMS	137
4.8 ANALYST ASSESSMENT OF HIGH-K MARKET TRENDS	111	6.1.3 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW – CHEMICAL DELIVERY CABINETS	138
4.8.1 ANALYST ASSESSMENT OF METAL MARKET TRENDS	112	6.1.4 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW VALVE MANIFOLD BOXES (VMB)	139
<b>5 SUPPLY-SIDE MARKET LANDSCAPE</b>	<b>113</b>	6.1.5 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW – BULK SPEC GAS SYSTEMS	140
5.1 PRECURSOR MATERIAL MARKET SHARE	114	6.1.6 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW – GAS CABINETS	141
5.1.1 CURRENT QUARTER ACTIVITY – MERCK	115	6.1.7 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW – FORMING GAS & DOPANT GAS BLENDERS	142
5.1.1.1 MERCK	116	6.1.8 SUB-TIER SUPPLY CHAIN: SOURCES & MARKETS OVERVIEW CHEMICAL - MONITORING AND ANALYTICAL SYSTEMS	143
5.1.2 CURRENT QUARTER ACTIVITY – AIR LIQUIDE	118		
5.1.2.1 AIR LIQUIDE	119		
5.1.3 CURRENT QUARTER ACTIVITY –ENTEGRIS	120		
5.1.3.1 ENTEGRIS	121		
5.1.4 ADEKA	122		
5.1.4.1 ADEKA	123		
5.2 M&A ACTIVITY AND PARTNERSHIPS	124		
5.3 PLANT CLOSURES	126		
5.4 NEW ENTRANTS	127		
5.4.1 MSP LAUNCHES TURBO II™ VAPORIZERS: NEXT-GEN EFFICIENCY FOR SEMICONDUCTOR FABRICATION	128		

# TABLE OF CONTENTS

6.2 SUB-TIER MATERIAL CVD & ALD PRECURSOR TRENDS	144	6.22 SUB-TIER SUPPLY-CHAIN PRICING TRENDS - GERMANIUM	168
6.3 SUB-TIER MATERIAL INDUSTRIAL VS. SEMICONDUCTOR-GRADE	145	6.23 SUB-TIER SUPPLY-CHAIN TECHCET ANALYST ASSESSMENT	170
6.4 SEMICONDUCTOR-GRADE SUB-TIER MATERIAL SUPPLIER GLOBAL NETWORK MERCK	146	<b>7 SUPPLIER PROFILES</b>	<b>171</b>
6.5 SEMICONDUCTOR-GRADE SUB-TIER MATERIAL SUPPLIER GLOBAL NETWORK AIR LIQUIDE	147	ADEKA CORPORATION	
6.6 SEMICONDUCTOR-GRADE SUB-TIER MATERIAL SUPPLIER NEWS	148	AIR LIQUIDE (MAKER, PURIFIER, SUPPLIER)	
6.7 SUB-TIER SUPPLY-CHAIN: DISRUPTIONS	150	AZMAX CO., LTD	
6.8 SUB-TIER SUPPLY-CHAIN PLANT UPDATES	151	CITY CHEMICAL LLC	
6.9 SUB-TIER SUPPLY-CHAIN PLANT UPDATES – HAFNIA AND REO FROM THE DUBBO PROJECT	152	DNF CO., LTD	
6.10 MINERAL USED IN THE SEMICONDUCTOR INDUSTRY DEPENDENCIES	153	...AND 20+ MORE	
6.11 SUB-TIER SUPPLY-CHAIN PRICING TRENDS - COBALT	154		
6.12 SUB-TIER SUPPLY-CHAIN PRICING TRENDS: ZIRCONIUM AND HAFNIUM	156		
6.13 SUB-TIER SUPPLY-CHAIN PRICING TRENDS – HAFNIUM	157		
6.14 SUB-TIER SUPPLY-CHAIN PRICING TRENDS - GALLIUM	158		
6.15 ALUMINUM	160		
6.16 TITANIUM	161		
6.17 TUNGSTEN	162		
6.18 MOLYBDENUM	163		
6.19 NIOBIUM AND TANTALUM	164		
6.20 RARE EARTHS	165		
6.21 SUB-TIER SUPPLY-CHAIN PRICING TRENDS - PGM	166		

# FIGURES & TABLES

## FIGURES

FIGURE 1.1: METAL & HIGH-K PRECURSOR REVENUE (M USD) FORECAST BY SEGMENT	15	FIGURE 3.17: 3D NAND TECHNOLOGY ROADMAP OVERVIEW	46
FIGURE 1.2: WW MARKET SHARE - METAL & HIGH-K PRECURSORS 2023 (U\$ 811 M)	18	FIGURE 3.18: INTEL OHIO PLANT SITE AS OF FEB. 2024	47
FIGURE 3.1: GLOBAL ECONOMY AND THE ELECTRONICS SUPPLY CHAIN (2023)	28	FIGURE 3.19: TECHCET WAFER START FORECAST BY NODE SEGMENTS	50
FIGURE 3.2: WORLDWIDE SEMICONDUCTOR SALES	29	FIGURE 3.20: TECHCET WORLDWIDE MATERIALS FORECAST (\$M USD)	51
FIGURE 3.3: TECHCET'S TAIWAN SEMICONDUCTOR INDUSTRY INDEX (TTSI)	30	FIGURE 4.1: METAL & HIGH-K PRECURSOR REVENUE (M USD) FORECAST BY SEGMENT	56
FIGURE 3.4: 2023 SEMICONDUCTOR CHIP APPLICATIONS	31	FIGURE 4.2: MEMORY SUPPLY/DEMAND SITUATION 2024	57
FIGURE 3.5: GLOBAL LIGHT VEHICLE UNIT SALES (IN MILLIONS OF UNITS)	33	FIGURE 4.3: WW MARKET SHARE - METAL & HIGH-K PRECURSORS 2023 (U\$ 811 M)	58
FIGURE 3.6: ELECTRIFICATION TREND BY WORLD REGION	34	FIGURE 4.4: REGIONAL MARKET SHARES	59
FIGURE 3.7: AUTOMOTIVE SEMICONDUCTOR PRODUCTION	35	FIGURE 4.5: END USE APPLICATIONS DRIVING NEW DEVICE PROCESSES	67
FIGURE 3.8: MOBILE PHONE SHIPMENTS, WW ESTIMATES	36	FIGURE 4.6: 3D NAND STACKING DRIVES DIELECTRICS AND METALS PRECURSOR VOLUME	68
FIGURE 3.9: WORLDWIDE PC AND TABLET FORECAST	37	FIGURE 4.7: 3D NAND PROGRESSION	69
FIGURE 3.10: TSMC PHOENIX CAMPUS WITH THE 2ND FAB VISIBLE IN THE BACKGROUND	39	FIGURE 4.8: ETCH DEPTH PERFORMANCE	70
FIGURE 3.11: ESTIMATED GLOBAL FAB SPENDING 2023-2028	40	FIGURE 4.9: TOKYO ELECTRON'S NEW CRYOGENIC ETCH TOOL	70
FIGURE 3.12: FAB EXPANSIONS WITHIN THE US	41	FIGURE 4.10: DRAM MESH BY MICRON	72
FIGURE 3.13: SEMICONDUCTOR CHIP MANUFACTURING REGIONS OF THE WORLD	42	FIGURE 4.11: IMEC CAPACITORLESS IGZO CELL FOR 3D STACKED DRAM	72
FIGURE 3.14: GLOBAL TOTAL EQUIPMENT SPENDING (US\$ M) AND Y-O-Y CHANGE	43	FIGURE 4.12: TRANSITION FROM 2D TO 3D DRAM	73\
FIGURE 3.15: ADVANCED LOGIC DEVICE TECHNOLOGY ROADMAP OVERVIEW	44	FIGURE 4.13: 32 GB NVDRAM WITH 1T 1C MEMORY LAYERS	74
FIGURE 3.16: DRAM TECHNOLOGY ROADMAP OVERVIEW	45	FIGURE 4.14: GATE STRUCTURE ROADMAP	75
		FIGURE 4.15: ADVANCED LOGIC (FOUNDY) NODE ROAD MAP	76



# FIGURES & TABLES

FIGURE 4.16: LOGIC TRANSISTOR PROGRESSION	77	FIGURE 4.38: ADEKA ASD-HF PRECURSORS	98
FIGURE 4.17: RIBBON FET	78	FIGURE 4.39: SELECTIVE ALD ENABLED BY PLASMA PRETREATMENT	99
FIGURE 4.18: MONO LAYER NANO SHEETS CHANNELS	80	FIGURE 4.40: SPECIALTY/EMERGING METAL APPLICATIONS	100
FIGURE 4.19: NANO IMPRINT LITHOGRAPHY PROCESS FLOW	81	FIGURE 4.41: SPECIALTY/EMERGING HIGH-K APPLICATIONS – NVM DRAM (MICRON IEDM2023)	101
FIGURE 4.20: ALD/ALE ENHANCEMENT OF NANO IMPRINT LITHOGRAPHY	81	FIGURE 4.42: 2023 METAL & HIGH-K REVENUE SHARE BY REGION	102
FIGURE 4.21: DIRECTED SELF-ASSEMBLY	82	FIGURE 4.43: EHS ISSUES – HIGH-K: MINING IN CHINA	107
FIGURE 4.22: DSA PATENT FILING BY COMPANY	83	FIGURE 4.44: SK HYNIX'S RECYCLED AND RENEWABLE MATERIALS TARGETS	108
FIGURE 4.23: DSA PATEN FILING SINCE 2023	83	FIGURE 5.1: 2023 PRECURSOR MATERIAL SUPPLIER MARKET SHARE BY REVENUE	114
FIGURE 4.24: WHAT IS PATTERN SHAPING?	84	FIGURE 5.2: MERCK ELECTRONICS REVENUE 2022-2023 (M EUR), LEFT. SEMICONDUCTOR SOLUTIONS ANNUAL REVENUE FORECAST (M EUR), RIGHT.	117
FIGURE 4.25: REFINING EUV PATTERNING BY APPLIED MATERIALS	85	FIGURE 5.3: AIR LIQUIDE ELECTRONICS REVENUE FORECAST (M EUR)	119
FIGURE 4.26: COMPLEMENTARY FET (CFET)	86	FIGURE 5.4: THE MS (MATERIAL SOLUTIONS) DIVISION OF ENTEGRIS REVENUE FORECAST	121
FIGURE 4.27: CFET IMPROVES PERFORMANCE IN TRACK SCALING	86	FIGURE 5.5: ADEKA REVENUE ELECTRONICS REVENUE FORECAST (100M JPY)	122
FIGURE 4.28: MONOLITHIC CFET PROCESS FLOW EXAMPLE	87	FIGURE 5.6: NEW ZIRCONIUM PRECURSOR CLASS	129
FIGURE 4.29: MCFET NEW FEATURE: MIDDLE DIELECTRIC ISOLATION	87	FIGURE 5.7: ADVANCES IN MOLYBDENUM THIN FILMS: NEW LIQUID PRECURSORS BOOST VAPOR PHASE DEPOSITION	130
FIGURE 4.30: LOW TEMPERATURE GATE STACK OPTION EXAMPLES	88	FIGURE 6.1: FORMING GAS BLENDER CONFIGURATION	142
FIGURE 4.31: LOW TEMPERATURE SD/CONTACT OPTION EXAMPLES	88	FIGURE 6.2: TOP COUNTRIES/REGIONS THAT SUPPLY VERSUM MATERIALS US LLC (PANJIVA APRIL 2024)	146
FIGURE 4.32: BSPDN ADVANTAGE: IR DROP REDUCTION	89		
FIGURE 4.33: INCREASING NUMBER OF ALD STEPS REQUIRED BY NEXT GENERATION GAA-FET AND CFET	90		
FIGURE 4.34: IMEC SUB-1NM TRANSISTOR ROADMAP, 3D-STACKED CMOS 2.0 PLANS	91		
FIGURE 4.35: PATENT FILING FOR MLD DEPOSITED EUV RESIST. SEARCH PERFORMED IN PATBASE	92		
FIGURE 4.36: MOLECULAR LAYER DEPOSITION VS ATOMIC LAYER DEPOSITION	93		
FIGURE 4.37: INCREASING TREND OF ALD/MLD PUBLICATIONS	94		

# FIGURES & TABLES

FIGURE 6.3: TOP COUNTRIES/REGIONS THAT SUPPLY AIR LIQUIDE AMERICA CORP. (PANJEIVA APRIL 2024)	147
FIGURE 6.4: TOP COUNTRIES/REGIONS THAT SUPPLY H.C. STARCK INC. (USA)	148
FIGURE 6.5: PRICE TREND IN COBALT	155
FIGURE 6.6: HAFNIUM 5-YEAR PRICING	157
FIGURE 6.7: GALLIUM PRICE, 5 YEAR HISTORICAL	159
FIGURE 6.8: RUTHENIUM AND PLATINUM, 5-YEAR HISTORICAL PRICING	167
FIGURE 6.9: GERMANIUM PRICE, 5-YEAR HISTORICAL	169

## TABLES

TABLE 1.1: METAL AND HI-K PRECURSORS REVENUES AND GROWTH RATES	15
TABLE 1.2: ESTIMATED METAL AND HIGH-K PRECURSOR MARKET SHARE BY SUPPLIER 2023	18
TABLE 3.1: GLOBAL GDP AND SEMICONDUCTOR REVENUES	26
TABLE 3.2: WORLD BANK ECONOMIC OUTLOOK (JANUARY 2024)	27
TABLE 3.3: BATTERY ELECTRIC VEHICLE (BEV) REGIONAL TRENDS	34
TABLE 3.4: DATA CENTER SYSTEMS AND COMMUNICATION SERVICES MARKET SPENDING 2023	38
TABLE 4.1: PRECURSORS REVENUE AND GROWTH RATES	53
TABLE 4.2: METAL AND HI-K PRECURSORS REVENUES AND GROWTH RATES	56
TABLE 4.3: ESTIMATED METAL AND HIGH-K PRECURSOR MARKET SHARE BY SUPPLIER 2023	58
TABLE 4.4: METAL & HIGH-K PRECURSOR MARKET REGIONAL ASSESSMENT 2023	59
TABLE 4.5: OVERVIEW OF ANNOUNCED 2023/2024 MATERIAL SUPPLIER INVESTMENTS	62
TABLE 4.6: LEADING EDGE LOGIC DESCRIPTIONS BY NODE (TSMC, INTEL)	78
TABLE 4.7: SELECTIVE DEPOSITION - SELECTIVELY DEPOSITED MATERIALS	97
TABLE 4.8: REGIONAL PRECURSOR MATERIAL MARKETS	103
TABLE 4.9: REGIONAL PRECURSOR MATERIAL MARKETS, CONTINUED	104
TABLE 5.1: MERCK QUARTER FINANCIALS	115
TABLE 5.2: AIR LIQUIDE CURRENT QUARTER FINANCIALS	118

# FIGURES & TABLES

TABLE 5.3: ENTEGRIS SUPPLIER CURRENT QUARTER FINANCIALS	120
TABLE 6.1: CVD AND ALD PRECURSOR	145
TABLE 6.2: ORIGIN OF MINERALS USED TO MAKE PRECURSORS	153
TABLE 6.3: COBALT MINING AND PRODUCTION BY LOCATION	154
TABLE 6.4: ZIRCONIUM AND HAFNIUM MINERAL PRODUCTION BY LOCATION	156
TABLE 6.5: GALLIUM MINERAL PRODUCTION DESCRIPTION AND DEPENDENCIES	158
TABLE 6.6: ALUMINUM MINERAL REFINING AND PRODUCTION BY LOCATION	160
TABLE 6.7: TITANIUM ORE (ILMENITE AND RUTILE) PRODUCTION LOCATIONS	161
TABLE 6.8: TUNGSTEN ORE PRODUCTION BY LOCATION	162
TABLE 6.9: MOLYBDENUM PRODUCTION AND IMPORT AND EXPORTS	163
TABLE 6.10: MOLYBDENUM PRODUCTION DESCRIPTIONS	163
TABLE 6.11: NIOBIUM AND TANTALUM PRODUCTION BY LOCATION	164
TABLE 6.12: RARE EARTHS PRODUCTION BY LOCATION , I.E. LANTHANUM	165
TABLE 6.13: PGM PRODUCTION BY LOCATION	166
TABLE 6.14: GERMANIUM APPLICATIONS BY PERCENTAGE VOLUME	168

# 2

## SCOPE, PURPOSE AND METHODOLOGY

- SCOPE
- PURPOSE
- METHODOLOGY
- OVERVIEW OF  
OTHER TECHCET CMR™  
OFFERINGS

## 2.1 SCOPE

- This report covers the market landscape and supply-chain for Precursors used in semiconductor device fabrication. It includes information about key suppliers, issues/trends in the material supply chain, estimates on supplier market share, and forecast for the material segments.
- This Critical Materials Report™ (CMR) provides focused information for
  - Business Development Managers
  - Supply Chain Managers
  - R&D directors
  - Investors / Financial Analysts
  - Policy Makers

## 2.2 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.
- Data and analysis is generated from both primary and secondary market research performed by TECHCET's staff of market and technology analysts. Forecasts models are developed from TECHCET's database of historical information, process flows and wafer forecasts by technology node and device type. These are then validated with market research interviews with industry experts. For more information on TECHCET Critical materials Reports™ please go to <https://TEHCET.com>

## 2.3 OVERVIEW OF OTHER TECHCET CMR™ OFFERINGS

- TEHCET produces electronic material supply chain reports each year as one of its functions for the Critical Materials Council. Reports to be published in 2024 can be found at [www.techcet.com](http://www.techcet.com) and are listed in the table below:

TEHCET's Critical Materials Expert Data & Consulting	
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	Equipment Components - Elastomers
9	Gases - Electronic Specialty, Bulk & Rare Gases
10	Metal Plating Chemicals
11	Photoresists, Ancillaries & Extension Materials
12	Sputtering Targets
13	Silicon and SOI Wafers
14	Special Report: SiC Wafers and Manufacturing Costing
15	Wet Chemicals / Specialty Cleans & Containment
16	Special Report: Impact of Chip Expansions on Chemical Supply-Chains
17	Packaging Materials (die attach, EMC, lead frame, wire, etc.)