

**TEHCET**

Electronics Materials Information



# 2024-2025 CMR™ CERAMICS

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.

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## 7 PROFILES

3M COMPANY
AGC INC.
APPLIED CERAMICS, INC.
ASUZAC INC., FINE CERAMICS DIVISION
CARBORUNDUM UNIVERSAL LTD (CUMI)
...AND 30+ MORE

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## 2.1 SCOPE

- This report covers the market and supply-chain for ceramics used in semiconductor device fabrication. 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>
- Effort has been made to focus the scope of this report on Semiconductor applications only, and the supply chain supporting Semiconductor applications. However, the various players do not differentiate revenue or volumes allocated to Semiconductor, Solar or other high-tech applications - often bucketed together as Semiconductor, Solar, Medical, Lighting or L.E.D. or as "Electronics Industry", which covers Semiconductor, Solar, Lighting or L.E.D. There may be some co-mingling despite every effort to focus on Semiconductor-only.
- Additionally, there are very well-known overlaps in applications such as certain Etch and Deposition processes where quartz, SiC, Silicon, and other ceramics may be selected based on specific customer application and needs. The report acknowledges this and makes effort to distinguish the ratios allocated to quartz. TECHCETs Ceramics Critical Material Report™ provides more information , including for these applications and complements TECHCETs Quartz Critical Material Report™.

## 2.2 PURPOSE & METHODOLOGY

### 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.

### 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.

## 2.3 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 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