



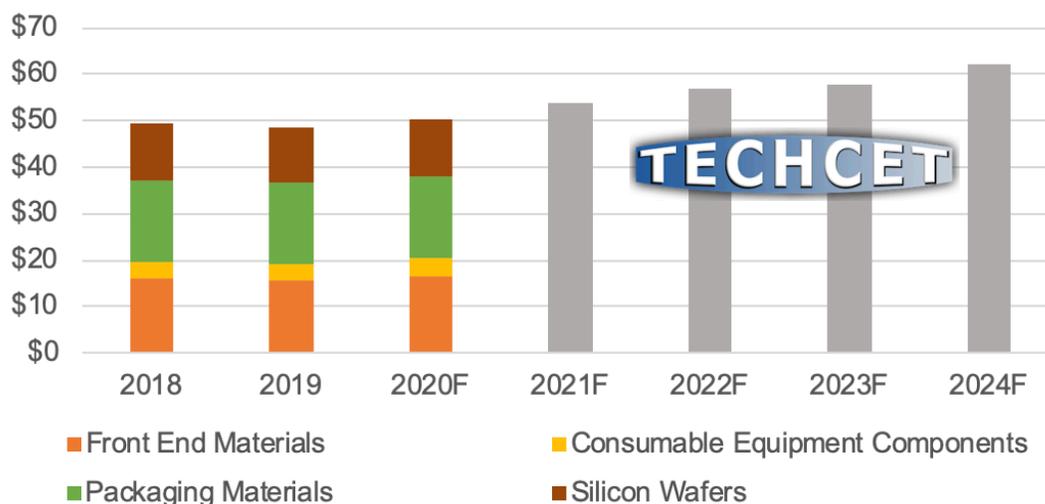
Electronics Materials Information

Semiconductor Materials \$50B Market on a Strong Run in 2021

Pandemic pushing people to Work From Home and School From Home

San Diego, CA, January 12, 2021: TEHCET—the electronic materials advisory services firm providing business and technology information— announced that global revenues for semiconductor manufacturing and packaging materials grew approximately 4% year-over-year (YoY) in 2020 to ~US\$50B, and are expected to grow ~7% in 2021 to nearly US\$54B. The COVID-19 pandemic has created strong demand for both logic and memory ICs to support Work From Home (WFH) and School From Home (SFH), and such demand is expected to increase despite expanding availability of virus vaccines. Also, demand for automotive ICs has recovered and will be an important driver in 2021 growth. The compound annual growth rate (CAGR) through 2024 is forecast at 5.3% as per the latest TEHCET Critical Materials Reports (CMR) and shown in the attached figure.

Global Semiconductor Manufacturing and Packaging Materials Forecast (US\$B)



"Localism is an ongoing global trend, with China, the European Union, South Korea, Taiwan, and the United States all investing in electronic materials capacities due to embargoes and tariffs disrupting supply-chains," said Lita Shon-Roy, TEHCET President and CEO. "Even without political disruptions, critical materials for the fabrication of advanced logic and memory chips such as cobalt and lanthanum have been in short supply due to competing industrial demands, and we expected tightening supply of silicon wafers in 2021."



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Such ramifications are tracked by TECHCET's analysts, with Analysts' Alerts emailed to CMR purchasers to help them anticipate and mitigate potential supply-chain disruptions. Excerpts have been publicly disclosed on the following critical materials ([click here to read the full stories](#)):

- IPA in "*CMC Considers Bio-Solvents to Reduce Fab Risks*",
- HF in "*Semi Wet Chemicals US\$2B Market Threatened by Localization*", and
- Lanthanum in "*Rare Earth Elements (REE) Supply Uncertain for IC Fabs*".

Any switch in material source triggers the need to re-qualify with cycles of test wafers and rigorous metrology, and similar data are needed during chip fabrication to ensure that material quality is under control. The public 2021 CMC Conference—happening April 14-15, 2020 in virtual space—is now soliciting presentations on themes surrounding semiconductor fab materials quality and metrology issues.

Critical Materials Reports™ and Market Briefings: <https://techcet.com/shop/>

CMC Events: <https://cmcfabs.org/cmc-conference-2021/>

ABOUT TECHCET: TECHCET CA LLC is an advisory services firm focused on process materials supply-chains, electronic materials business, and materials market analysis for the semiconductor, display, solar/PV, and LED industries. Since 2000, the company has been responsible for producing the SEMATECH Critical Material Reports™, covering silicon wafers, semiconductor gases, wet chemicals, CMP consumables, Photoresists, and ALD/CVD Precursors. The Critical Materials Council (CMC) of semiconductor fabricators is a business unit of TECHCET, and includes materials supplier Associate Members. For additional information about reports, market briefings, CMC membership, or custom consulting please contact info@cmcfabs.org, +1-480-332-8336, or go to www.techcet.com or www.cmcfabs.org.