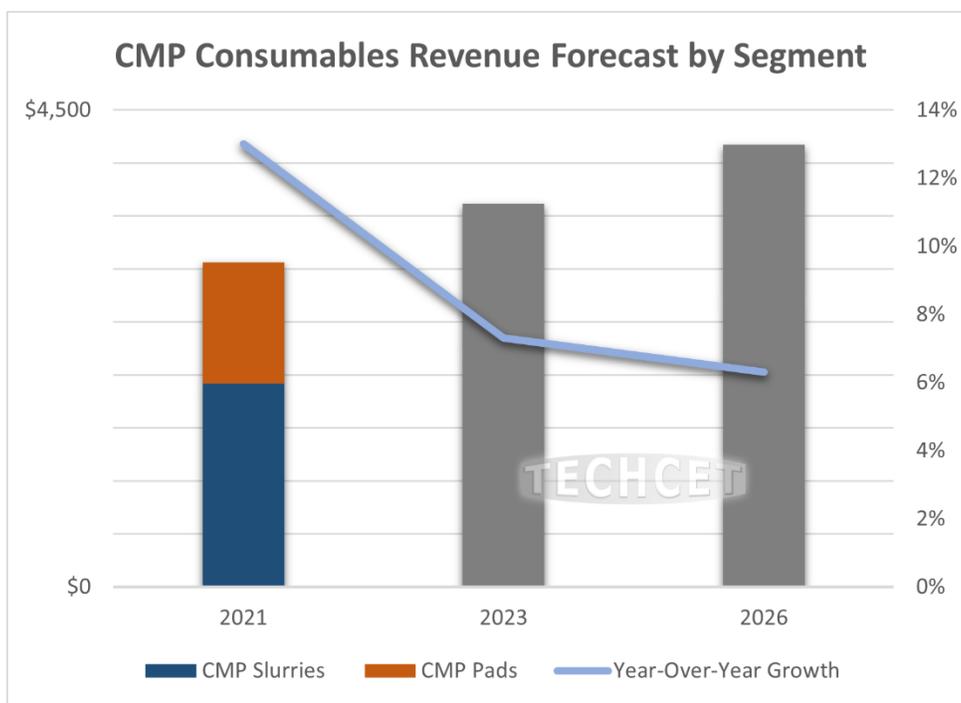




Electronics Materials Information

CMP Consumables – Supply is Tight and Costs Expected to Rise *as legacy products are replaced by leading edge*

San Diego, CA, May XX, 2022: TECHCET—the electronic materials advisory firm providing business and technology information— announced the Chemical Mechanical Planarization (CMP) consumables market for semiconductors grew almost 13% in 2021 to reach US\$3.0 billion. The CMP market, including both slurries and pads, will grow almost 9% in 2022 to US\$3.3 billion, and the forecast through 2026 shows this market growing at over a 6% CAGR.



CMP processes continue to increase as leading-edge devices ramp up in production. The logic market is seeing a shift from FinFET to GAA, which increases the number of CMP steps and the introduction of new materials for the metal gate, as indicated in [TECHCET's 2022 Critical Materials Report™ on CMP Consumables](#). Under consideration are cobalt, ruthenium, molybdenum, nickel, and various alloys. Strong growth in leading edge DRAM and 3DNAND is boosting demand for tungsten, copper and cobalt pads and slurries. Growth is also driven by advanced 3DNAND as wafer starts for higher layer generations ramp up in production.

Demand will continue to slow for consumables for legacy products, though slurries and pads for commonly used materials, such as oxide and tungsten, will continue to be available. As new materials replace those used in legacy products, availability of consumables for the legacy materials will decrease



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as some suppliers will discontinue their consumables legacy product lines. This will result in less competition and will likely drive-up prices for legacy CMP products.

Slurry prices are expected to hold or increase, particularly on specialty slurries and on small quantity orders over the next year or two. Nanoceria slurries are in growing demand, driven by the need for improved surface quality and defectivity control.

Due to the lack of competition in the pad market, pad prices will hold firm. Small quantity orders will receive a premium price. However, if the new pad supplier entrants in China gain position in the local market, it could soften prices for competitive pads in China.

For more details on the CMP Consumables market segments and growth trajectory go to:

<https://techcet.com/product/cmp-slurry-and-pads-only/>

ABOUT TEHCET: TEHCET CA LLC is an advisory services firm expert in market analysis and business development of electronic markets and supply-chains for the semiconductor, display, solar/PV, and LED industries. TEHCET offers consulting, reports, and subscription services, including the Critical Materials Council (CMC) of semiconductor fabricators and CM Data subscription services. For additional information, please contact info@techcet.com, +1-480-332-8336, or go to www.techcet.com