

Electronic Gases Rebounding After 14% Drop

Techcet Forecasts \$2.9B Gas Business by 2012

Del Mar, CA, June 21: The 2009 market for electronic gases totaled \$2.37B, down 14% from the prior year, according to a new report from Techcet Group, “**Gases for Semiconductor Device Processing 2010, A Techcet Group Critical Materials Report.**” The 2010 outlook is for 11% growth overall, with the electronic specialty gases segment leading the way with 15% growth to \$1.6B. The combined electronic gases market is expected to reach beyond \$2.9B by 2012, according to Techcet’s forecast.

Sales of specialty gases correlate very closely with silicon wafer consumption, and rode the roller coaster down with the semiconductor business through the recession. Bulk gases do not track as closely with wafer starts because the gas volumes attributed to other electronic applications are large in comparison to IC bulk gas. Driven by consumer spending in lieu of vacations and travel, TFT display sales were up over 20% for 2009, helping to keep overall gas revenues from diving too deeply. Gases for the solar market benefitted somewhat less, even though solar cell revenues actually grew 10% to 15% for 2009. However, excess inventory from 2008 kept solar cell production low for 2009. The impact was a net decrease of ~14% for solar gas revenues in 2009.

The electronic gas market leader continues to be Air Products with 26% global market share, followed by Taiyo Nippon Sanso and Air Liquide with 22% each, Linde with 16% and Praxair with 9%.

The report discusses the global issues that are affecting the market dynamics and supply chain stability for He, SiH₄, HCl and NF₃, all of which are critical to electronics manufacturing. The outlook for future gas usage as shaped by environmental concerns, legislative changes, and geopolitical issues are also discussed.

In addition to market analysis, critical supply chain issues and technical trends, the report includes profiles and news updates for the major suppliers to the global electronic gases industry.

Techcet Group, LLC specializes in market analysis and technical trend analysis for the semiconductor, silicon, PV, TFT and related electronics industries. The company has been responsible for producing the International Sematech Critical Material Reports since 2001. Other reports released this quarter include:

- CMP Consumables
- Wet Chemicals
- High κ and ALD Precursors
- Photoresists and Photoresist Ancillaries
- Sputter Targets
- Quartz
- PV Materials

For additional information about “**Gases for Semiconductor Device Processing 2010, A Techcet Group Critical Materials Report**” and other Techcet reports, contact Lita Shon-Roy, +1-858-259-9077, lshonroy@techcet.com, or visit our website at www.techcet.com.

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