

For Immediate Release

Flash Memory, A/P Region Lead Photoresists to \$1.15B Sales in 2010

Techcet Forecasts \$1.55B in Photoresists for 2012

Del Mar, CA, June 16: Photoresist manufacturers' wishes for a speedy recovery from the recession were only nearly met, with 2010 sales climbing to 93% of the 2007 peak. That recovery will be complete with room to spare in 2011, according to a new report from Techcet Group, "**Photoresists and Photoresist Ancillaries, Semiconductor Critical Materials Report 2011.**" Revenues are expected to continue to grow at 4.7% over the next three years.

Flash memory remains in the lithography driver's seat, fueling demand for 193nm immersion with double patterning, followed by DRAM and microprocessors. About 40% of all semiconductor resist revenue earned is for 193nm (ArF) dry and immersion patterning, as it is 3-6 times more expensive than the work horse 248nm and i-line resists used for most layers produced.

There continues to be an unsustainably high number of suppliers in the resist market, with at least nine manufacturers offering standard and advanced photoresist products. JSR and TOK share 46% of the global market, with Dow approaching 20% while others hold shares of 8% or less. With a surge in R&D expenses expected as EUV becomes the primary focus at the leading edge, it seems likely that some consolidation is due. Meanwhile, the resist manufacturers are sustained by an abundant supply of resins, PACs and PAGs despite the declining number of materials suppliers. Worldwide, there are only four basic resin suppliers, three of them in Japan. Many solvents and other materials used in the photolithographic process are no longer made in the U.S. This includes solvents such as IPA and other critical chemistries used for carriers and processes in the semiconductor manufacturing world.

The photoresist ancillary markets, which include strippers/removers, developers, ARCs and other ancillaries (EBR, HMDS, specialty solvents) are expected to reach a combined \$1.22B this year, up 16% over 2009.

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

Techcet Group, LLC specializes in technical trend analysis and market analysis for the semiconductor, silicon, PV 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
- Gases
- Sputter Targets
- Wet Chemicals

For additional information about these reports, contact Lita Shon-Roy, lshonroy@techcet.com, +1-480-336-2160, or visit our website at www.techcet.com.

SOURCE: Techcet Group, LLC

© 2011 Techcet Group, LLC