

IAL MARKET REPORT GLOBAL MARKET FOR ELECTRONIC CHEMICALS

5th Edition

May 2004

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This 5th edition of the IAL Market Report on the Global Market for Electronic Chemicals is the latest in its series of publications on the electronic chemicals industry.

The following geographical regions are included in the report:

Europe/Africa

- Western Europe
- Eastern Europe
- Middle East
- Africa

The Americas

- North America
- South America

Asia-Pacific

- North Asia
- Southeast Asia
- Indian Subcontinent
- Oceania

The market is analysed in terms of the main chemical and plastics components used in the manufacture of semiconductor devices and PCBs. Market volume and value is presented for 2003, with forecasts for 2008.

Technological and commercial trends in the industry, as well as the main global and regional suppliers, are also covered.

The report illustrates the importance of the Chinese market in stimulating a recovery in the global electronic chemicals market in 2003 and with this in mind various aspects of the Chinese electronics industry itself are discussed, including:

- Leading players
- Future investments,
- Market drivers
- Drive for self-sufficient in terms of electronic materials/chemicals

A whole chapter of the report is dedicated to the description of 28 independent Chinese companies active in the Chinese electronic chemicals market. Besides China, the other emerging economies of India, Eastern Europe, South America and eventually Africa will offer medium-to-long-term opportunities for electronic chemical suppliers.

The decline in the global electronic chemicals market during the late 1990s has been further aggravated by the slowdown in the global telecommunications industry and other economic uncertainties introduced by SARS and 9/11. However the latter has helped to maintain the defence/aerospace and medical equipment sectors, especially in North America. Recovery of the global electronics industry in 2003 was prompted by the demand for consumer digital products, such as:

- Digital cameras
- Next generation cellular phones
- Flat screen display units, eg for DVD and TV equipment

Future markets being developed in the North Asia region, but to be marketed globally, include:

- Integrated circuit (IC) tags
- Personal digital assistants (PDAs)
- Automotive navigational aids

Since aggressive pricing has eroded profits for standard electronic chemical products, technically innovative products and processes are crucial to improving margins and growth in the industry. Areas which have been developed include:

- 300 mm wafers
- KrF and ArF photoresist technologies
- Nanotechnology applications eg in chemical mechanical planarisation (CMP)
- Plasma etching and cleaning
- Microvia boards for mobile phones
- Increased use of flexible laminates for portable electronic products
- Ultrafine traces and adhesiveless laminates for PCB manufacture

Nevertheless the high cost of product development will contribute to a further consolidation of the industry in the near future.

Environmental legislation, involving the phasing out of lead-containing solders in 2006 and the reduction in the amount of heavy metals, will continue to impact upon the PCB industry

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