

# IAL MARKET REPORT GLOBAL MARKET FOR ELECTRONIC CHEMICALS

**Publication: February 2000**

**Price: £1,250**

The IAL Market Report on the Global Market for Electronic Chemicals – 1999 is the latest in its series of publications on the electronic chemicals industry.

In 1999, the total global market had an estimated value of \$21.0 billion, with the semiconductor industry accounting for approximately \$11.1 billion and printed circuit boards (PCBs) for \$9.9 billion. Geographical coverage is as follows:

Region	Market Value (US\$ Billion)
NAFTA	5.5
Japan	5.6
Asia-Pacific	5.1
Western Europe	4.1
Rest of the World	0.7
<b>Total</b>	<b>21.0</b>

Country coverage within each region is as follows:  
**NAFTA** - Canada, Mexico and USA.

**Asia-Pacific** - China, India, Indonesia, Malaysia, Philippines, Singapore, South Korea, Taiwan, Others

**Western Europe** France, Germany, Ireland, Italy, Netherlands, UK Others

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 1999, with forecasts to 2004.

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

The decline in the global electronic chemicals (e-chems) market over the last three years, up to 1999, can be attributed to three main factors:

- Global over-capacity in semiconductor manufacturing

- Tight inventory management by the OEMs
- Asian economic crisis

The semiconductor market began expanding in 1999 with industrial sources predicting double digit growth by 2000 and 2001. This present recovery in the global semiconductor market largely results from two factors:

- Growth in the use of the Internet
- Exponential increase in e-commerce globally

The global PCB market is also recovering from the recent downturn in the electronics market, due in part to the Asian crisis. Other characteristics of this sector include:

- Increase in off-shore manufacturing
- Growth in contract electronic manufacturing

Future growth areas for PCB manufacturing include an increasing demand for more sophisticated boards for:

- Telecommunications and IT
- Smart cards
- Electronic gaming
- Consumer goods, e.g. digital cameras

The recent decline in the global market for electronic chemicals and the related pressure on the suppliers has resulted in:

- Consolidation of existing suppliers
- Globalisation of PCB manufacturers and supply
- Introduction of new technologies and products by electronic chemicals suppliers to stimulate market growth, e.g. SiLK low dielectric constant resins as insulating layers in high-density and high-speed integrated circuits
- Mineral acid manufacturers are now supplying the semiconductor market direct
- Growing trend to expand the scope of sub-contracted Chemicals Management to include water and recycling facilities
- The drive of countries like Taiwan towards self-sufficiency in terms of sourcing e-chems

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