



2016 April MONTHLY MEETING

Sue Davis, Dir. Business Development, Techcet
Jerry Yang, Ph.D., CMC Fabs Manager
Lita Shon-Roy, President / CEO

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TECHCET
Electronics Materials Information

Outline

- CMC Fabs Update
 - *Techcet Report Update*
 - *CMC New Member Recruitment update*
 - *CMC Advisory Group Formation Update*
 - *Alerts / News and Blog Feeds*
 - *Mini-Survey and Chemical Pricing Survey update*
- F-2-F Meeting & Conf Update
 - *May 3-4 F-2-F Agenda*
 - *May 5-6 CMC Conference Agenda Final*
- Hot Topics, Q&A (15 min)

2016 Techcet Critical Materials Report Status

[CMC members 35% discount on Report Advisories
and 15% discount for others]

TEHCET Critical Materials Report		List Price	Issue Date
1	2016 CVD / ALD Metal Precursors	\$8268	Just Released
2	2016 Electronic Gases	\$8268	May 30
3	2016 Wet Process Chemicals	\$8568	May 30
4	2016 Silicon Wafers	\$8268	May 30
5	2016 Photoresists and Ancillaries	\$8268	May 30
6*	2016 CVD / ALD Dielectric Precursors	\$5268*	Aug 10
7	2016 CMP Slurries and Pads Consumables	\$8568	July 10
8	2016 Sputtering Targets	\$8268	July 10
9*	2015 -16 Quartz -Equip Components (Dec '15)	\$5268*	Available
10*	2015-16 Ceramics - Equip Components (Dec '15)	\$6225*	Available
11*	2014-16 Silicon Carbide - Equip Components (Dec '15)	\$5268*	Available

Silicon Equipment Components May be Offered Depending on Demand – Please contact lshonroy@Techcet.com

* Critical Material Reports no Advisory Service

CMC new member recruitment

- **Micron:** Joe Ryan Director of Category Management and his staff evaluating membership proposal.
- **TSMC:** Mr. C. Joe Wu, Deputy Director and George Hsueh, Materials Procurement manager evaluating membership proposal. Lita and Jerry will visit in late May and discuss with Handy Ko, Materials and Parts Procurement Director.
 - *UMC: Ernest Kuo, Deputy Director of Procurement is highly interested in the CMC and TECHCET Reports. However, waiting for TSMC to rejoin first.*
- **Samsung:** Mr. Stan Lee, Director of Procurement, and Mr. River Han, Procurement Director for CMP Materials. Interested in US and China Supply Chain Market information and TECHCET reports. Lita and Jerry will visit them and discuss proposal details in late May.
 - *Hynix: waiting for Samsung to re-join. (DRAM Market dynamics making it more difficult to justify without Samsung.) Mr. An and Mr. Kim continue to be highly interested in the CMC!*

CMC new member recruitment con't

- Next will be
 - *SMIC*
 - *HHNEC (aka Grace Semi)*
 - *XMC*
 - *ST Micro*
 - *OnSemi*
 - *Renesas*
 - *Maxim*
 - *Microchip, etc.*

CMC Advisory Group Update

- A CMC Advisory group is formed with the objective of providing feedback to TECHCET on business ideas relating to the CMC
- Chad Kaneshige - TI
- Mark Denney - Intel
- Angela Franklin - Qorvo

Topics of first meeting

Membership Recruiting and Associate Membership

Quarterly Updates and Alerts Info

Going forward

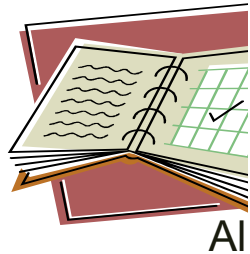
- Selected Quarterly Updates Info will be presented to the CMC at monthly meetings
 - *Meeting presentation will be posted – viewable to ALL*
 - *The complete Quarterly Updates will be posted and viewable to only those who have selected that subject matter – viewable to those who selected/purchased.*

- Alerts / Important and New – New Feature being tested (<http://cmcfabs.org/test-all-posts/>)
 - *Posted by the analysts –*
 - Auto Sent to members
 - Viewable to members only page and analysts page (may select a subject of interest, i.e. gases, wet chem, all, etc.)
 - *Posted by the members*
 - Auto Sent to members
 - Viewable on **members only** page (may select a subject group)

CMC Fabs Survey Update

- A Mini-Survey for ISO/TS 16949 Benchmarking has been completed, and the consolidated summary report has been forward to participating members on April 6th.
- Any additional requests of Mini-Survey please send it to JYang@techcet.com
- Double Blind Survey on 90-days-old on Pricing Survey NF3/WF6/ SiH4 has been sent out on March 4 with password protection from me, and blind returns to Mary Frances Corey at Techcet LLC (e-mail: mfcorey@techcet.com). Consolidated summary with mean and standard deviation will be provided if there are more than 5 feedbacks. (could change to 4 requirements)

CMC F-2-F (May 3-4) Meeting Agenda



Critical Materials Council Meeting Agenda Draft

Day 1 – Tuesday, May 3, 2016 at Intel Conf Room

8:00 AM Busing to Intel at Ronler Acres Campus Conf Room RA2-321

8:30 AM Welcome, Introductions, Meeting Objectives and Agenda Review All

9:20 AM Shared presentations – Materials Forecast Methods All
(3 X 20 minutes)

10:20 AM **Break**

10:40 AM Continue Shared presentations – – Materials Forecast Methods All
(3 x 20 minutes)

11:40 AM **Lunch**

1:00 PM Continued Shared presentations – Materials Forecast Methods All
(2 X 20 minutes)

1:40 PM **Break**

2:00 PM Hot Topics Session (i.e. BCP, Supply issues with NF3, WF6, He
Chemical Specification Surveys, NowPak Process Change Notification) All

3:00 PM First Day Take-Away session, Review Next Day's Agenda All

3:20 PM Supplier Site Visit (TOK)

5:30 PM Adjourn, Leave visiting site and to Dinner Restaurant

6:30 PM Networking Dinner; at McMenamin's, Cornelius Pass RoadHouse & Imbrie Hall; 4045 NW Cornelius Pass Rd.
Hillsboro, OR 503-640-6174. <http://www.mcmenamins.com/CPR>

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Mcmenamins

Edgefield Concerts Crystal Ballroom Schedule Movie Schedule

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Music,
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About

McMenamins Breweries



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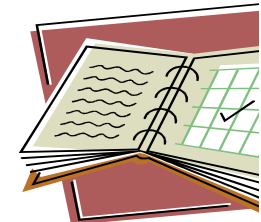
McMenamins Breweries



<http://www.mcmenamins.com/Breweries>

Critical Materials Council Meeting Agenda

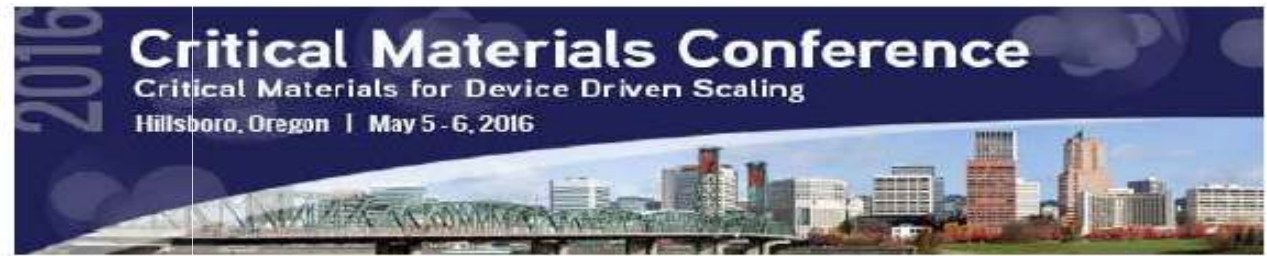
Day 2 – Wednesday, May 4, 2016 at Intel Conf Room



- 8:00 AM Busing to Intel at Ronler Acres Campus Conf Room RA2-321 All
- 8:30 AM Reconvene All
- 8:30 AM Morning Supplier Presentations to CMC
- 08:30 AM Supplier A Honeywell*
 - 09:00 AM Supplier B Dow Corning*
 - 09:30 AM Supplier C Linde*
 - 10:00 AM Supplier D Air Liquide*
 - 10:30 AM Supplier E Cryoin (Neon Gas)*
- 11:00 AM Member Company / Supplier 1:1 Session, conf room RA2-319,320,315,312,310.
- 12:30 AM **Lunch**
- 1:30 PM Shared presentations – Managing Supplier Performance
(4x 20 min) All
- 2:50 PM **Break**
- 3:10 PM Complete Shared presentations – – Managing Supplier Performance
(4 x 20 minutes) All
- and More Hot Topics, if time permits -
- 4:30 PM 2nd Day Take-Away session, Review CMC Conference Agenda on Day 3 All
- 4:50 PM Adjourn, Leave Intel and return to Hotel
- 5:15-7:00 PM - Evening Welcome Reception for CMC Conference

CMC Conference Agenda

- www.cmcfabs.org/agenda



“Critical Materials for Device Driven Scaling” by the Critical Materials Council and TECHCET

CMC Conference Agenda

Speaker Name, Topics or Titles of Presentations provided below. Official Titles of Presentations will be provided on or before April 25.

CMC Conference, Embassy Suites Hotel, Hillsboro, OR May 5-6, 2016

Wednesday Evening Reception with the Critical Materials Council: 5pm - 7pm

Day 1, 8:00 am, Featured Keynote Speaker:

**Tim G. Hendry - VP Technology & Manufacturing Group, Director, Fab Materials
Intel Corporation**

“Process Control Methods for Advanced Materials”

Day 1, Session I, 8:45 am

Global Strategic Initiatives [Supply Chain]

Session Chairs: Jim Feldhan, SEMICO & Qinghuang Lin, Ph.D., IBM

8:45 – 9:15	<i>The New Normal in the Global IC Fab Industry</i>	Gus Richard, Sr. Research Analyst - Northland Capital
9:15 – 9:40	<i>Materials Market Trends and Issues, including the China Supply Chain</i>	Lita Shon-Roy, President/CEO – TECHCET
9:40 – 10:10	<i>Equipment Market Growth for CMP, Deposition, Etch & Lithography</i>	Risto Puhakka, President - VLSI Research
10:10 – 10:40	<i>Packaging Materials -Future Challenges</i>	Suresh Ramalingam, Ph.D., Sr. Director, Advanced Packaging Development - XLINX
10:40 – 10:55		Break
10:55 – 11:25	<i>“From Ethical to Sustainable Sourcing of Rare Metals” - Rare Earths and Conflict Minerals</i>	Keith Long, Ph.D., Research Geologist – US Geological Survey
11:25 – 12:00	<i>Sustainability for Fab Facilities, i.e. Water, Power, Carbon Footprint</i>	Norm Armour, Managing Director, Worldwide Facilities and EHS – Micron Technology, Inc.

Hot Topics to Discuss -

 _____ (your hot topics here)

 _____ (your hot topics here)

 _____ (your hot topics here)

Questions / AR's / Wrap-Up

- AR's

- *Member share templates for May 3-4 F2F meeting to be completed and feedback by April 27.*

Thank You!

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