HIGH-DENSITY SEMICONDUCTOR PACKAGING: MARKET ANALYSIS AND TECHNOLOGY TRENDS

Table of Contents

Chapter 1	**Introduction**	**1-1**
Chapter 2	**Semiconductor Packaging Industry Overview**	**2-1**
2.1	History and Evolution of Semiconductor Packaging	2-1
2.2	Importance of Advanced Packaging in Semiconductors	2.3
2.3	Market Competitiveness	2-4
Chapter 3	**Technology Landscape**	**3-1**
3.1	Overview of Semiconductor Packaging Technologies	3-1
3.1.1	Evolution of Semiconductor Packaging	3-1
3.1.2	Types of Semiconductor Packaging	3-3
3.1.4	Conclusion	3-5
3.2	Recent Advances in Semiconductor Packaging: Flip-Chip Technology	3-5
3.2.1	Evolution and Advancements in Flip-Chip Technology	3-5
3.2.2	Benefits of Flip-Chip Technology	3-7
3.2.3	Applications of Flip-Chip Technology	3-7
3.2.4	Conclusion	3-8
3.3	Recent Advances in Semiconductor Packaging: 2.5D and 3D IC Packaging	3-8
3.3.1	Introduction	3-8
3.3.2	Conceptual Overview	3-9
3.3.3	Technological Advancements	3-9

3.3.4	Benefits of 2.5D and 3D IC Packaging	3-10
3.3.5	Applications	3-10
3.3.6	Conclusion	3-10
3.4	Recent Advances in Semiconductor Packaging: Fan-Out Wafer-Level Packaging (FOWLP)	3-11
3.4.1	Introduction	3-11
3.4.2	Concept and Development	3-11
3.4.3	Technological Advancements	3-13
3.4.4	Benefits of FOWLP	3-13
3.4.6	Conclusion	3-14
3.5	Recent Advances in Semiconductor Packaging: System-in-Package (SiP) Solutions	3-14
3.5.1	Introduction	3-14
3.5.2	Concept and Development	3-15
3.5.3	Technological Advancements	3-15
3.5.4	Benefits of SiP	3-15
3.5.5	Applications	3-16
3.5.6	Conclusion	3-16
3.6	Recent Advances in Semiconductor Packaging: Advanced Packaging for Artificial Intelligence	3-17
3.6.1	Introduction	3-17
3.6.2	The Need for Advanced AI Packaging	3-17
3.6.3	Key Advanced Packaging Technologies	3-19
3.6.4	Benefits of Advanced AI Packaging	3-21
3.6.5	Applications	3-21
3.6.6	Conclusion	3-23
Chapter 4	**Market Dynamics in Advanced Semiconductor Packaging**	**4.1**

4.1	Introduction	4-1
4.2	Market Drivers	4-1
4.2.1	Technological Advancements	4-1
4.2.2	Increasing Demand for Miniaturization	4-3
4.2.3	Growth in Consumer Electronics	4-3
4.2.4	Expansion of IoT and AI Applications	4-3
4.2.5	Demand for High-Performance Computing	4-6
4.3	Market Opportunities	4-7
4.3.1	Emerging Markets and Applications	4-7
4.3.2	Innovations in Packaging Technologies	4-7
4.3.3	Strategic Collaborations and Partnerships	4-8
4.3.4	Government Initiatives and Funding	4-8
4.4	Market Challenges	4-9
4.4.1	High Production Costs	4-9
4.4.2	Technical Complexities	4-10
4.4.3	Supply Chain Disruptions	4-12
4.4.4	Environmental and Regulatory Issues	4-13
4.5	Conclusion	4-13
Chapter 5	**The Rise of Panel Level Packaging**	**5-1**
5.1	Introduction to Panel Level Packaging (PLP)	5-1
5.2	Technical Details of PLP	5-1
5.2.1	Panel Size and Material	5-1
5.2.2	Manufacturing Process	5-1
5.2.3	Technological Advantages	5-2
5.3	Market Impact and Adoption	5-2
5.3.1	FOPLP Manufacturers	5-3

5.3.2	Equipment Costs	5-3
5.3.3	Material Costs	5-8
5.3.4	Manufacturing Costs	5-11
5.4	Challenges and Solutions	5-11
5.5 E	nablers to Lower Costs	5-12
5.6	Conclusion	5-12
Chapter 6	**3-D-TSV Technology**	**6-1**
6.1	Driving Forces In 3D-TSV	6-1
6.2	3-D Package Varieties	6-11
6.3	TSV Processes	6-17
6.4	Critical Processing Technologies	6-19
6.4.1	Plasma Etch Technology	6-23
6.4.2	Cu Plating	6-27
6.4.3	Thin Wafer Bonding	6-28
6.4.4	Wafer Thinning/CMP	6-32
6.4.5	Lithography	6-33
6.5	Applications	6-38
6.6	Limitations Of 3-D Packaging Technology	6-44
6.6.1	Thermal Management	6-44
6.6.2	Cost	6-46
6.6.3	Design Complexity	6-47
6.6.4	Time To Delivery	6-52
6.7	Company Profiles	6-53
Chapter 7	**Market Forecast**	**7-1**

7.1	Overview of Advanced Packages	7-1
7.2	Driving Forces	7-2
7.3	System-in-Package (SiP)	7-3
7.4	Flip Chip/Wafer Level Packaging	7-10
7.5	Worldwide IC Market Forecast	7-19
7.6	Worldwide Packaging Market Forecast	7-21
7.7	Worldwide Advanced Package Forecast	7-23
7.7.1	Worldwide 3-D Through Silicon Via (TSV) Market	7-33
7.7.1.1	TSMC CoWoS	7-37
7.7.1.2	Intel Foveros	7-42
7.7.1.3	Samsung’s Cube	7-45
7.7.1.4	HBM (High Bandwidth Memory) Packages	7-48
7.7.1.5	Chiplets	7-54

LIST OF TABLES

3.1	Multichip Modules Vs. Circuit Board Assemblies	3-13
5.1	Revenue Forecast For FOPLP Manufacturers	5-4
5.2	Revenue Forecast For FOPLP Equipment Manufacturers	5-5
5.3	Market Share Of Top FOPLP Equipment Manufacturer By Type	5-6
5.4	Revenue Forecast For FOPLP Material Suppliers	5-9
5.5	Market Share Of Top FOPLP Material Suppliers By Type	5-10
6.1	3-D Mass Memory Volume Comparison Between Other Technologies and TI’s 3D Technology In Cm^3/Gbit	6-7
6.2	3-D Mass Memory Weight Comparison Between Other Technologies and TI’s 3D Technology In $Grams^3$/Gbit	6-8
7.1	Semiconductor Forecast by Revenues	7-20
7.2	Worldwide IC Package Market Forecast	7-22
7.3	Worldwide Advanced Package Market - Wafers	7-29

7.4	Worldwide Advanced Package Market - Units	7-30
7.5	Worldwide Advanced Package Market - Revenues	7-31
7.6	TSMC'S CoWoS Revenue Analysis	7-43
7.7	HBM TAM Demand 2023-2026	7-59

LIST OF FIGURES

1.1	Schematic Cross-Section View Of An MCM-D	1-3
1.2	Cross-Section Of The RF And Microwave MCM-D Structure	1-5
1.3	Thin Film Layers On The Planarized Core Layer Of MCM-SL/D Technology	1-8
1.4	Flip Chip MCP	1-11
1.5	SIP Cross Section	1-14
3.1	Evolution of Semiconductor Packaging	3-2
3.2	Through Silicon Via (TSV) Processing	3-4
3.3	Flip-Chip Technology Micro Ball	3-6
3.4	Fan-Out Wafer-Level Packaging (FOWLP) Processes	3-12
3.5	High Bandwidth Memory (HBM)	3-18
3.6	Chip on Wafer on Substrate (CoWoS)	3-20
3.7	Fan-out Embedded Via Substrate (Feveros)	3-22
4.1	Packaging System Interconnect Scaling Roadmap	4-2
4.2	Technology Nodes Timeline	4-5
4.3	Scaling of Contact and Interconnect	4-11
6.1	3-D Technology On DRAM Density	6-2
6.2	3-D Through-Silicon Via (TSV)	6-5
6.3	Graphical Illustration Of The Silicon Efficiency Between MCMs And 3D Technology	6-9
6.4	Silicon Efficiency Comparison Between 3D Packaging	
	Technology And Other Conventional Packaging Technologies	6-10
6.5	3D Packages	6-12

6.6	Via First, Middle, And Last Process Flows	6-18
6.7	Via First TSV Process Flow	6-21
6.8	New Applications Driving TSV Growth	6-39
6.9	Projection Of TSV Applications And Process Requirements	6-41
6-10	3-D Technology For DRAM	6-43
6.11	Moore's Law For Active Element Density	6-48
7.1	Various System-In-Package (SiP) Applications	7-4
7.2	SiP Structures	7-7
7.3	Wire Bond Versus Flip Chip	7-15
7.4	Flip Chip And Wire Bond Equipment Forecast	7-16
7.5	Growth In Copper Wire Bonding	7-18
7.6	Unit Shipments Of Semiconductors	7-21
7.7	WLP Demand By Devices	7-31
7.8	Device Shipment Forecast FIWLP vs FOWLP	7-32
7.9	WLP Demand By Wafers	7-33
7.10	Projection of 3-D TSV Applications And Process Requirement	7-36
7.11	Market Forecast of 3-D TSV Units	7-37
7.12	Market Forecast of 3-D TSV Wafers	7-38
7.13	TSMC’s CoWoS Advanced Package	7-44
7.14	TSMC’s CoWoS Advanced Package Revenues	7-47
7.15	Samsung’s CUBE Advanced Package	7-52
7.16	SK hynix HBM3 Package	7-56