

# Global Semiconductor Cleaning Agents Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Semiconductor Cleaning Agents competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Semiconductor cleaning agents are a general term for specialized chemicals used in wafer manufacturing and advanced packaging processes. They are primarily used to remove contaminants such as organic residues, polymer byproducts, particles, and metal ions generated during etching, photolithography, and chemical mechanical polishing (CMP) to ensure the integrity of the device structure and the consistency and reliability of subsequent processes. Based on the different process stages and main cleaning targets, this paper defines semiconductor cleaning agents as three main types: post-etching cleaning solutions (for byproducts and particle residues in etched trenches, holes, and surfaces), photoresist cleaning solutions (for the stripping and removal of photoresist and its residues), and post-CMP cleaning solutions (for cleaning and corrosion control of slurry particles, chemical residues, and metal ions after polishing). In 2024, the sales volume of CMP post-cleaning solution was approximately 18,000 tons, with an average price range of US\$11.5 per kilogram. Semiconductor cleaning chemistries have evolved from auxiliary chemicals into a set of mission-critical material systems that are deeply embedded in the process window, underpinning the stable advancement of etch, lithography and CMP into leading-edge nodes. Around the three categories you defined photoresist cleaning solutions, post-etch cleaning solutions and post-CMP cleaning solutions the global competitive landscape is highly concentrated and shows a clear process module leading formulators pattern. In photoresist cleaning, players such as Dongjin Semichem, DuPont, Merck (Versum Materials), ENF Tech and Tokyo Ohka dominate and are tightly coupled with photoresist and front-end lithography processes. In post-

CMP cleaning, Entegris, Merck, Mitsubishi Chemical and Fujifilm lead the market, with a strong focus on co-optimization with pads, slurries and Cu/low-k interconnect structures. In the post-etch cleaning segment, Entegris, Qnity (DuPont), Merck and JSR Corporation are closely aligned with the evolution of plasma etch and materials stacks, continuously iterating around polymer residue removal, metal ion control and low-damage cleaning. In practice, the same company often participates in multiple sub-segments, yet builds differentiated product families for each process module, reflecting a system-level understanding of the entire flow and strong co-development capabilities with device makers. From a market perspective, semiconductor cleaning agents represent a process-driven specialty chemicals segment that is not huge in absolute size, but features extremely high technical barriers, very long qualification cycles and exceptionally strong customer stickiness. On one hand, these chemistries must balance cleaning performance, material compatibility, metallic contamination, and environmental and safety constraints within a very narrow process window, placing stringent demands on formulation design, raw material purity control, in-line stability and co-optimization with tools and processes. On the other hand, as logic and memory migrate toward more advanced nodes, 3D NAND stack heights increase, and advanced packaging scales up, the importance of post-etch, photoresist and post-CMP cleaning in the process flow continues to rise, driving a shift from single chemical products toward process-step- and material-stack-specific cleaning solutions. Overall, the semiconductor cleaning market is characterized by a combination of cross-segment portfolios from global leaders + high specialization at each process module, making it both a core battleground for international materials giants to reinforce their moats and a strategic entry point for local suppliers to penetrate the high-end semiconductor chemicals value chain, pursue import substitution, and upgrade their value-added, solution-oriented service capabilities.

The global Semiconductor Cleaning Agents market size was estimated at USD 1805.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Semiconductor Cleaning Agents market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market

positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Semiconductor Cleaning Agents market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Semiconductor Cleaning Agents market.

### **Global Semiconductor Cleaning Agents Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Entegris  
Qnity (DuPont)  
Merck (Versum Materials)  
JSR Corporation  
Mitsubishi Gas Chemical  
Dongjin Semichem  
FUJIFILM  
BASF  
LG Chem

Tokyo Ohka Kogyo  
ENF Tech  
Nagase  
Kanto Chemical  
Avantor  
Solexir Technology  
Technic Inc  
Anji Microelectronics Technology  
Jiangyin Jianghua Micro-electronic Materials Co., Ltd  
San Fu Chemical Co., Ltd

### **Market Segmentation (by Type)**

Post-etching Cleaning Solutions  
Photoresist Cleaning Solutions  
Post CMP Cleaning Solutions

### **Market Segmentation (by Application)**

200mm Process  
300mm Process  
Others

### **Geographic Segmentation**

North America (USA, Canada, Mexico)  
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)  
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)  
South America (Brazil, Argentina, Columbia, Rest of South America)  
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance  
Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value  
In-depth analysis of the Semiconductor Cleaning Agents Market  
Overview of the regional outlook of the Semiconductor Cleaning Agents Market:

## **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Semiconductor Cleaning Agents Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Semiconductor Cleaning Agents, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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