

Global Semiconductor Grade Etching Gas 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 Grade Etching Gas competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Semiconductor-grade etching gas refers to the general term for high-purity process gases specifically used for etching and cavity cleaning during the processing of integrated circuit wafers, flat panel displays, photovoltaics, and various types of microelectronic devices, including fluorine-containing, chlorine-containing, bromine-containing and mixed formula gases, etc.; Under plasma or high-energy excitation conditions, this type of gas decomposes to produce highly reactive atoms and free radicals, which chemically react or react with materials such as silicon, silicon dioxide, silicon nitride, low dielectric constant media, metals and their oxides. Physical and chemical synergy generates volatile products to achieve pattern transfer and material removal. Compared with industrial-grade products, semiconductor-grade etching gases have extremely strict requirements on metal impurities, moisture, organic impurities and particulate matter. They require multi-stage distillation, adsorption, filtration and online analysis and control, and are equipped with ultra-clean cylinders and high-purity gas supply systems to ensure the stability of etching rate, selectivity, anisotropy and line width control, and meet the yield and consistency requirements of advanced processes. In 2024, global Semiconductor Grade Etching Gas production reached approximately 37,907 MT, with an average global market price of around US\$ 26.33 per kg. The annual production capacity of semiconductor-grade etching gas is 55,000 tons, with a gross profit margin of about 40%. The key upstream raw materials are fluorspar, anhydrous hydrogen fluoride, fluorine gas, and carbon-containing raw materials such as methane, ethane, and propane. It is also equipped with high-pressure alloy cylinders, stainless steel valves, pressure reducing valves, ultra-clean pipelines,

etc. The downstream is mainly integrated circuit wafer factories, flat panel display panel factories, and photovoltaic cell factories. From a cost structure perspective, raw gases and basic chemicals usually account for 35% to 50% of the total cost, energy consumption, adsorbents, packing and equipment depreciation in the high-purity refining process account for about 20% to 30%, and high-pressure cylinders, valves, pipeline cleaning, cylinder testing and depreciation roughly account for 10% to 20%. Electronics manufacturing uses both wet and dry etching, but for different processes, much like using course- and fine-toothed saws to make different size and different quality cuts. In wet etching, aqueous solutions of acids or bases are used to quickly remove large amounts of material, or to completely remove a particular material. Dry etching uses plasma-activated etchant gases, usually containing halogen atoms, to selectively remove a portion of a material with greater precision and accuracy than wet etching can achieve. It is the dry etching process, often referred to as reactive ion etching or RIE. The etching process requires a chemical reaction between the electron gas and the etched material. In the etching process of wafer manufacturing, especially in the dry etching process, in order to achieve directional etching, it is necessary to use electronic special gases to form plasma under ionization conditions. The plasma undergoes chemical or physical reactions with the etched material to remove a portion of the etched material. Different electron gases are also used for reactions in different etching targets. The commonly used etching gases include fluorinated and chlorinated gases, as well as oxygen-containing gases and some rare gases. In the field of electronic semiconductors, etching gases are widely used in industries such as integrated Circuits, liquid crystal panels, LED and photovoltaics. Among them, integrated circuit manufacturing is the most important application. In recent years, downstream industry technologies have rapidly changed, especially in the field of integrated circuit manufacturing, where process nodes have been continuously reduced, ranging from 28nm to 5nm processes, and wafer sizes from 8-inch to 12-inch wafers. As a key material in integrated circuit manufacturing, with the rapid iteration of downstream industrial technology, the requirements for purity and accuracy of special gases continue to improve. Asia Pacific is the region with the largest demand for semiconductor grade etching gases. Etching gases mainly include fluorine containing gas, chlorine containing gas, oxygen containing gas and other types. And the fluorine containing gas is the most common. Fluorinated containing gas include the following gases: CF₄, NF₃, SF₆, CH₂F₂, CHF₃, C₂F₆, C₃F₈, C₄F₈, C₅F₈, HF, etc. Silicon wafer etching gases are mainly fluorine-containing gases, but they are isotropic and have poor selectivity.

The global Semiconductor Grade Etching Gas market size was estimated at USD 998.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of

7.60% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Semiconductor Grade Etching Gas 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 Grade Etching Gas 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 Grade Etching Gas market.

Global Semiconductor Grade Etching Gas 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

Linde
SKSpecialty
Kanto Denka Kogyo
ADEKA
PERIC Special Gases
Merck (Versum Materials)
Resonac
Nippon Sanso
Hyosung
Air Liquide
Haohua Chemical
Zibo Feiyuan Chemical
Kemeite (Yoke Technology)
Solvay
Huatae Gas
Yongjing Technology
Air Products
Jinhong Gas
Concorde Specialty Gases
Linggas
Foosung
Wonik Materials
DIG AIRGAS
TEMC

Market Segmentation (by Type)

Fluorine Containing Gas
Chlorine Containing Gas
Oxygen Containing Gas
Others

Market Segmentation (by Application)

Integrated Circuits
Display Panels
Solar
LED

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 Grade Etching Gas Market

Overview of the regional outlook of the Semiconductor Grade Etching Gas 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 Grade Etching Gas 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 Grade Etching Gas, 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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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Semiconductor Grade Etching Gas
- 1.2 Key Market Segments
 - 1.2.1 Semiconductor Grade Etching Gas Segment by Type
 - 1.2.2 Semiconductor Grade Etching Gas Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 SEMICONDUCTOR GRADE ETCHING GAS MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Semiconductor Grade Etching Gas Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Semiconductor Grade Etching Gas Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 SEMICONDUCTOR GRADE ETCHING GAS MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Semiconductor Grade Etching Gas Product Life Cycle
- 3.3 Global Semiconductor Grade Etching Gas Sales by Manufacturers (2020-2025)
- 3.4 Global Semiconductor Grade Etching Gas Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Semiconductor Grade Etching Gas Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Semiconductor Grade Etching Gas Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Semiconductor Grade Etching Gas Market Competitive Situation and Trends

- 3.8.1 Semiconductor Grade Etching Gas Market Concentration Rate
- 3.8.2 Global 5 and 10 Largest Semiconductor Grade Etching Gas Players Market Share by Revenue
- 3.8.3 Mergers & Acquisitions, Expansion

4 SEMICONDUCTOR GRADE ETCHING GAS INDUSTRY CHAIN ANALYSIS

- 4.1 Semiconductor Grade Etching Gas Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF SEMICONDUCTOR GRADE ETCHING GAS MARKET

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
 - 5.4.1 New Product Developments
 - 5.4.2 Mergers & Acquisitions
 - 5.4.3 Expansions
 - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
 - 5.5.1 Industry Policies Analysis
 - 5.5.2 Economic Environment Analysis
 - 5.5.3 Social Environment Analysis
 - 5.5.4 Technological Environment Analysis
- 5.6 Global Semiconductor Grade Etching Gas Market Porter's Five Forces Analysis
 - 5.6.1 Global Trade Frictions
 - 5.6.2 U.S. Tariff Policy ? April 2025
 - 5.6.3 Global Trade Frictions and Their Impacts to Semiconductor Grade Etching Gas Market
- 5.7 ESG Ratings of Leading Companies

6 SEMICONDUCTOR GRADE ETCHING GAS MARKET SEGMENTATION BY TYPE

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global Semiconductor Grade Etching Gas Sales Market Share by Type (2020-2025)

6.3 Global Semiconductor Grade Etching Gas Market Size by Type (2020-2025)

6.4 Global Semiconductor Grade Etching Gas Price by Type (2020-2025)

7 SEMICONDUCTOR GRADE ETCHING GAS MARKET SEGMENTATION BY APPLICATION

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global Semiconductor Grade Etching Gas Market Sales by Application (2020-2025)

7.3 Global Semiconductor Grade Etching Gas Market Size (M USD) by Application (2020-2025)

7.4 Global Semiconductor Grade Etching Gas Sales Growth Rate by Application (2020-2025)

8 SEMICONDUCTOR GRADE ETCHING GAS MARKET SALES BY REGION

8.1 Global Semiconductor Grade Etching Gas Sales by Region

8.1.1 Global Semiconductor Grade Etching Gas Sales by Region

8.1.2 Global Semiconductor Grade Etching Gas Sales Market Share by Region

8.2 Global Semiconductor Grade Etching Gas Market Size by Region

8.2.1 Global Semiconductor Grade Etching Gas Market Size by Region

8.2.2 Global Semiconductor Grade Etching Gas Market Size by Region

8.3 North America

8.3.1 North America Semiconductor Grade Etching Gas Sales by Country

8.3.2 North America Semiconductor Grade Etching Gas Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe Semiconductor Grade Etching Gas Sales by Country

8.4.2 Europe Semiconductor Grade Etching Gas Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific Semiconductor Grade Etching Gas Sales by Region

8.5.2 Asia Pacific Semiconductor Grade Etching Gas Market Size by Region

8.5.3 China Market Overview

- 8.5.4 Japan Market Overview
- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
 - 8.6.1 South America Semiconductor Grade Etching Gas Sales by Country
 - 8.6.2 South America Semiconductor Grade Etching Gas Market Size by Country
 - 8.6.3 Brazil Market Overview
 - 8.6.4 Argentina Market Overview
 - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa Semiconductor Grade Etching Gas Sales by Region
 - 8.7.2 Middle East and Africa Semiconductor Grade Etching Gas Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 SEMICONDUCTOR GRADE ETCHING GAS MARKET PRODUCTION BY REGION

- 9.1 Global Production of Semiconductor Grade Etching Gas by Region(2020-2025)
- 9.2 Global Semiconductor Grade Etching Gas Revenue Market Share by Region (2020-2025)
- 9.3 Global Semiconductor Grade Etching Gas Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Semiconductor Grade Etching Gas Production
 - 9.4.1 North America Semiconductor Grade Etching Gas Production Growth Rate (2020-2025)
 - 9.4.2 North America Semiconductor Grade Etching Gas Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Semiconductor Grade Etching Gas Production
 - 9.5.1 Europe Semiconductor Grade Etching Gas Production Growth Rate (2020-2025)
 - 9.5.2 Europe Semiconductor Grade Etching Gas Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Semiconductor Grade Etching Gas Production (2020-2025)
 - 9.6.1 Japan Semiconductor Grade Etching Gas Production Growth Rate (2020-2025)
 - 9.6.2 Japan Semiconductor Grade Etching Gas Production, Revenue, Price and Gross

Margin (2020-2025)

9.7 China Semiconductor Grade Etching Gas Production (2020-2025)

9.7.1 China Semiconductor Grade Etching Gas Production Growth Rate (2020-2025)

9.7.2 China Semiconductor Grade Etching Gas Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 Linde

10.1.1 Linde Basic Information

10.1.2 Linde Semiconductor Grade Etching Gas Product Overview

10.1.3 Linde Semiconductor Grade Etching Gas Product Market Performance

10.1.4 Linde Business Overview

10.1.5 Linde SWOT Analysis

10.1.6 Linde Recent Developments

10.2 SKSpecialty

10.2.1 SKSpecialty Basic Information

10.2.2 SKSpecialty Semiconductor Grade Etching Gas Product Overview

10.2.3 SKSpecialty Semiconductor Grade Etching Gas Product Market Performance

10.2.4 SKSpecialty Business Overview

10.2.5 SKSpecialty SWOT Analysis

10.2.6 SKSpecialty Recent Developments

10.3 Kanto Denka Kogyo

10.3.1 Kanto Denka Kogyo Basic Information

10.3.2 Kanto Denka Kogyo Semiconductor Grade Etching Gas Product Overview

10.3.3 Kanto Denka Kogyo Semiconductor Grade Etching Gas Product Market

Performance

10.3.4 Kanto Denka Kogyo Business Overview

10.3.5 Kanto Denka Kogyo SWOT Analysis

10.3.6 Kanto Denka Kogyo Recent Developments

10.4 ADEKA

10.4.1 ADEKA Basic Information

10.4.2 ADEKA Semiconductor Grade Etching Gas Product Overview

10.4.3 ADEKA Semiconductor Grade Etching Gas Product Market Performance

10.4.4 ADEKA Business Overview

10.4.5 ADEKA Recent Developments

10.5 PERIC Special Gases

10.5.1 PERIC Special Gases Basic Information

10.5.2 PERIC Special Gases Semiconductor Grade Etching Gas Product Overview

- 10.5.3 PERIC Special Gases Semiconductor Grade Etching Gas Product Market Performance
- 10.5.4 PERIC Special Gases Business Overview
- 10.5.5 PERIC Special Gases Recent Developments
- 10.6 Merck (Versum Materials)
 - 10.6.1 Merck (Versum Materials) Basic Information
 - 10.6.2 Merck (Versum Materials) Semiconductor Grade Etching Gas Product Overview
 - 10.6.3 Merck (Versum Materials) Semiconductor Grade Etching Gas Product Market Performance
 - 10.6.4 Merck (Versum Materials) Business Overview
 - 10.6.5 Merck (Versum Materials) Recent Developments
- 10.7 Resonac
 - 10.7.1 Resonac Basic Information
 - 10.7.2 Resonac Semiconductor Grade Etching Gas Product Overview
 - 10.7.3 Resonac Semiconductor Grade Etching Gas Product Market Performance
 - 10.7.4 Resonac Business Overview
 - 10.7.5 Resonac Recent Developments
- 10.8 Nippon Sanso
 - 10.8.1 Nippon Sanso Basic Information
 - 10.8.2 Nippon Sanso Semiconductor Grade Etching Gas Product Overview
 - 10.8.3 Nippon Sanso Semiconductor Grade Etching Gas Product Market Performance
 - 10.8.4 Nippon Sanso Business Overview
 - 10.8.5 Nippon Sanso Recent Developments
- 10.9 Hyosung
 - 10.9.1 Hyosung Basic Information
 - 10.9.2 Hyosung Semiconductor Grade Etching Gas Product Overview
 - 10.9.3 Hyosung Semiconductor Grade Etching Gas Product Market Performance
 - 10.9.4 Hyosung Business Overview
 - 10.9.5 Hyosung Recent Developments
- 10.10 Air Liquide
 - 10.10.1 Air Liquide Basic Information
 - 10.10.2 Air Liquide Semiconductor Grade Etching Gas Product Overview
 - 10.10.3 Air Liquide Semiconductor Grade Etching Gas Product Market Performance
 - 10.10.4 Air Liquide Business Overview
 - 10.10.5 Air Liquide Recent Developments
- 10.11 Haohua Chemical
 - 10.11.1 Haohua Chemical Basic Information
 - 10.11.2 Haohua Chemical Semiconductor Grade Etching Gas Product Overview
 - 10.11.3 Haohua Chemical Semiconductor Grade Etching Gas Product Market

Performance

10.11.4 Haohua Chemical Business Overview

10.11.5 Haohua Chemical Recent Developments

10.12 Zibo Feiyuan Chemical

10.12.1 Zibo Feiyuan Chemical Basic Information

10.12.2 Zibo Feiyuan Chemical Semiconductor Grade Etching Gas Product Overview

10.12.3 Zibo Feiyuan Chemical Semiconductor Grade Etching Gas Product Market

Performance

10.12.4 Zibo Feiyuan Chemical Business Overview

10.12.5 Zibo Feiyuan Chemical Recent Developments

10.13 Kemeite (Yoke Technology)

10.13.1 Kemeite (Yoke Technology) Basic Information

10.13.2 Kemeite (Yoke Technology) Semiconductor Grade Etching Gas Product

Overview

10.13.3 Kemeite (Yoke Technology) Semiconductor Grade Etching Gas Product

Market Performance

10.13.4 Kemeite (Yoke Technology) Business Overview

10.13.5 Kemeite (Yoke Technology) Recent Developments

10.14 Solvay

10.14.1 Solvay Basic Information

10.14.2 Solvay Semiconductor Grade Etching Gas Product Overview

10.14.3 Solvay Semiconductor Grade Etching Gas Product Market Performance

10.14.4 Solvay Business Overview

10.14.5 Solvay Recent Developments

10.15 Huate Gas

10.15.1 Huate Gas Basic Information

10.15.2 Huate Gas Semiconductor Grade Etching Gas Product Overview

10.15.3 Huate Gas Semiconductor Grade Etching Gas Product Market Performance

10.15.4 Huate Gas Business Overview

10.15.5 Huate Gas Recent Developments

10.16 Yongjing Technology

10.16.1 Yongjing Technology Basic Information

10.16.2 Yongjing Technology Semiconductor Grade Etching Gas Product Overview

10.16.3 Yongjing Technology Semiconductor Grade Etching Gas Product Market

Performance

10.16.4 Yongjing Technology Business Overview

10.16.5 Yongjing Technology Recent Developments

10.17 Air Products

10.17.1 Air Products Basic Information

- 10.17.2 Air Products Semiconductor Grade Etching Gas Product Overview
- 10.17.3 Air Products Semiconductor Grade Etching Gas Product Market Performance
- 10.17.4 Air Products Business Overview
- 10.17.5 Air Products Recent Developments
- 10.18 Jinhong Gas
 - 10.18.1 Jinhong Gas Basic Information
 - 10.18.2 Jinhong Gas Semiconductor Grade Etching Gas Product Overview
 - 10.18.3 Jinhong Gas Semiconductor Grade Etching Gas Product Market Performance
 - 10.18.4 Jinhong Gas Business Overview
 - 10.18.5 Jinhong Gas Recent Developments
- 10.19 Concorde Specialty Gases
 - 10.19.1 Concorde Specialty Gases Basic Information
 - 10.19.2 Concorde Specialty Gases Semiconductor Grade Etching Gas Product Overview
 - 10.19.3 Concorde Specialty Gases Semiconductor Grade Etching Gas Product Market Performance
 - 10.19.4 Concorde Specialty Gases Business Overview
 - 10.19.5 Concorde Specialty Gases Recent Developments
- 10.20 Linggas
 - 10.20.1 Linggas Basic Information
 - 10.20.2 Linggas Semiconductor Grade Etching Gas Product Overview
 - 10.20.3 Linggas Semiconductor Grade Etching Gas Product Market Performance
 - 10.20.4 Linggas Business Overview
 - 10.20.5 Linggas Recent Developments
- 10.21 Foosung
 - 10.21.1 Foosung Basic Information
 - 10.21.2 Foosung Semiconductor Grade Etching Gas Product Overview
 - 10.21.3 Foosung Semiconductor Grade Etching Gas Product Market Performance
 - 10.21.4 Foosung Business Overview
 - 10.21.5 Foosung Recent Developments
- 10.22 Wonik Materials
 - 10.22.1 Wonik Materials Basic Information
 - 10.22.2 Wonik Materials Semiconductor Grade Etching Gas Product Overview
 - 10.22.3 Wonik Materials Semiconductor Grade Etching Gas Product Market Performance
 - 10.22.4 Wonik Materials Business Overview
 - 10.22.5 Wonik Materials Recent Developments
- 10.23 DIG AIRGAS
 - 10.23.1 DIG AIRGAS Basic Information

- 10.23.2 DIG AIRGAS Semiconductor Grade Etching Gas Product Overview
- 10.23.3 DIG AIRGAS Semiconductor Grade Etching Gas Product Market Performance
- 10.23.4 DIG AIRGAS Business Overview
- 10.23.5 DIG AIRGAS Recent Developments
- 10.24 TEMC
 - 10.24.1 TEMC Basic Information
 - 10.24.2 TEMC Semiconductor Grade Etching Gas Product Overview
 - 10.24.3 TEMC Semiconductor Grade Etching Gas Product Market Performance
 - 10.24.4 TEMC Business Overview
 - 10.24.5 TEMC Recent Developments

11 SEMICONDUCTOR GRADE ETCHING GAS MARKET FORECAST BY REGION

- 11.1 Global Semiconductor Grade Etching Gas Market Size Forecast
- 11.2 Global Semiconductor Grade Etching Gas Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe Semiconductor Grade Etching Gas Market Size Forecast by Country
 - 11.2.3 Asia Pacific Semiconductor Grade Etching Gas Market Size Forecast by Region
 - 11.2.4 South America Semiconductor Grade Etching Gas Market Size Forecast by Country
 - 11.2.5 Middle East and Africa Forecasted Sales of Semiconductor Grade Etching Gas by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

- 12.1 Global Semiconductor Grade Etching Gas Market Forecast by Type (2026-2035)
 - 12.1.1 Global Forecasted Sales of Semiconductor Grade Etching Gas by Type (2026-2035)
 - 12.1.2 Global Semiconductor Grade Etching Gas Market Size Forecast by Type (2026-2035)
 - 12.1.3 Global Forecasted Price of Semiconductor Grade Etching Gas by Type (2026-2035)
- 12.2 Global Semiconductor Grade Etching Gas Market Forecast by Application (2026-2035)
 - 12.2.1 Global Semiconductor Grade Etching Gas Sales (K Units) Forecast by Application
 - 12.2.2 Global Semiconductor Grade Etching Gas Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

- Table 1. Introduction of the Type
- Table 2. Introduction of the Application
- Table 3. Global Semiconductor Grade Etching Gas Market Size by Type (M USD)
- Table 4. Global Semiconductor Grade Etching Gas Market Size by Application
- Table 5. Semiconductor Grade Etching Gas Market Size Comparison by Region (M USD)
- Table 6. Global Semiconductor Grade Etching Gas Sales (K Units) by Manufacturers (2020-2025)
- Table 7. Global Semiconductor Grade Etching Gas Sales Market Share by Manufacturers (2020-2025)
- Table 8. Global Semiconductor Grade Etching Gas Revenue (M USD) by Manufacturers (2020-2025)
- Table 9. Global Semiconductor Grade Etching Gas Revenue Share by Manufacturers (2020-2025)
- Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Semiconductor Grade Etching Gas as of 2025)
- Table 11. Global Market Semiconductor Grade Etching Gas Average Price (USD/Unit) of Key Manufacturers (2020-2025)
- Table 12. Manufacturers? Manufacturing Sites, Areas Served
- Table 13. Manufacturers? Product Type
- Table 14. Global Semiconductor Grade Etching Gas Manufacturers Market Concentration Ratio (CR5 and HHI)
- Table 15. Mergers & Acquisitions, Expansion Plans
- Table 16. Market Overview of Key Raw Materials
- Table 17. Midstream Market Analysis
- Table 18. Downstream Customer Analysis
- Table 19. Key Development Trends
- Table 20. Driving Factors
- Table 21. Semiconductor Grade Etching Gas Market Challenges
- Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026
- Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027
- Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026
- Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries
- Table 26. Global Semiconductor Grade Etching Gas Sales by Type (K Units)

Table 27. Global Semiconductor Grade Etching Gas Market Size by Type (M USD)

Table 28. Global Semiconductor Grade Etching Gas Sales (K Units) by Type (2020-2025)

Table 29. Global Semiconductor Grade Etching Gas Sales Market Share by Type (2020-2025)

Table 30. Global Semiconductor Grade Etching Gas Market Size (M USD) by Type (2020-2025)

Table 31. Global Semiconductor Grade Etching Gas Market Share by Type (2020-2025)

Table 32. Global Semiconductor Grade Etching Gas Price (USD/Unit) by Type (2020-2025)

Table 33. Global Semiconductor Grade Etching Gas Sales (K Units) by Application

Table 34. Global Semiconductor Grade Etching Gas Market Size by Application

Table 35. Global Semiconductor Grade Etching Gas Sales by Application (2020-2025) & (K Units)

Table 36. Global Semiconductor Grade Etching Gas Sales Market Share by Application (2020-2025)

Table 37. Global Semiconductor Grade Etching Gas Market Size by Application (2020-2025) & (M USD)

Table 38. Global Semiconductor Grade Etching Gas Market Share by Application (2020-2025)

Table 39. Global Semiconductor Grade Etching Gas Sales Growth Rate by Application (2020-2025)

Table 40. Global Semiconductor Grade Etching Gas Sales by Region (2020-2025) & (K Units)

Table 41. Global Semiconductor Grade Etching Gas Sales Market Share by Region (2020-2025)

Table 42. Global Semiconductor Grade Etching Gas Market Size by Region (2020-2025) & (M USD)

Table 43. Global Semiconductor Grade Etching Gas Market Size by Region (2020-2025)

Table 44. North America Semiconductor Grade Etching Gas Sales by Country (2020-2025) & (K Units)

Table 45. North America Semiconductor Grade Etching Gas Market Size by Country (2020-2025) & (M USD)

Table 46. Europe Semiconductor Grade Etching Gas Sales by Country (2020-2025) & (K Units)

Table 47. Europe Semiconductor Grade Etching Gas Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific Semiconductor Grade Etching Gas Sales by Region (2020-2025)

& (K Units)

Table 49. Asia Pacific Semiconductor Grade Etching Gas Market Size by Region (2020-2025) & (M USD)

Table 50. South America Semiconductor Grade Etching Gas Sales by Country (2020-2025) & (K Units)

Table 51. South America Semiconductor Grade Etching Gas Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Semiconductor Grade Etching Gas Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa Semiconductor Grade Etching Gas Market Size by Region (2020-2025) & (M USD)

Table 54. Global Semiconductor Grade Etching Gas Production (K Units) by Region(2020-2025)

Table 55. Global Semiconductor Grade Etching Gas Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Semiconductor Grade Etching Gas Revenue Market Share by Region (2020-2025)

Table 57. Global Semiconductor Grade Etching Gas Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America Semiconductor Grade Etching Gas Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe Semiconductor Grade Etching Gas Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan Semiconductor Grade Etching Gas Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Semiconductor Grade Etching Gas Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. Linde Basic Information

Table 63. Linde Semiconductor Grade Etching Gas Product Overview

Table 64. Linde Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. Linde Business Overview

Table 66. Linde SWOT Analysis

Table 67. Linde Recent Developments

Table 68. SKSpecialty Basic Information

Table 69. SKSpecialty Semiconductor Grade Etching Gas Product Overview

Table 70. SKSpecialty Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. SKSpecialty Business Overview

- Table 72. SKSpecialty SWOT Analysis
- Table 73. SKSpecialty Recent Developments
- Table 74. Kanto Denka Kogyo Basic Information
- Table 75. Kanto Denka Kogyo Semiconductor Grade Etching Gas Product Overview
- Table 76. Kanto Denka Kogyo Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 77. Kanto Denka Kogyo Business Overview
- Table 78. Kanto Denka Kogyo SWOT Analysis
- Table 79. Kanto Denka Kogyo Recent Developments
- Table 80. ADEKA Basic Information
- Table 81. ADEKA Semiconductor Grade Etching Gas Product Overview
- Table 82. ADEKA Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 83. ADEKA Business Overview
- Table 84. ADEKA Recent Developments
- Table 85. PERIC Special Gases Basic Information
- Table 86. PERIC Special Gases Semiconductor Grade Etching Gas Product Overview
- Table 87. PERIC Special Gases Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 88. PERIC Special Gases Business Overview
- Table 89. PERIC Special Gases Recent Developments
- Table 90. Merck (Versum Materials) Basic Information
- Table 91. Merck (Versum Materials) Semiconductor Grade Etching Gas Product Overview
- Table 92. Merck (Versum Materials) Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 93. Merck (Versum Materials) Business Overview
- Table 94. Merck (Versum Materials) Recent Developments
- Table 95. Resonac Basic Information
- Table 96. Resonac Semiconductor Grade Etching Gas Product Overview
- Table 97. Resonac Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 98. Resonac Business Overview
- Table 99. Resonac Recent Developments
- Table 100. Nippon Sanso Basic Information
- Table 101. Nippon Sanso Semiconductor Grade Etching Gas Product Overview
- Table 102. Nippon Sanso Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 103. Nippon Sanso Business Overview

- Table 104. Nippon Sanso Recent Developments
- Table 105. Hyosung Basic Information
- Table 106. Hyosung Semiconductor Grade Etching Gas Product Overview
- Table 107. Hyosung Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 108. Hyosung Business Overview
- Table 109. Hyosung Recent Developments
- Table 110. Air Liquide Basic Information
- Table 111. Air Liquide Semiconductor Grade Etching Gas Product Overview
- Table 112. Air Liquide Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 113. Air Liquide Business Overview
- Table 114. Air Liquide Recent Developments
- Table 115. Haohua Chemical Basic Information
- Table 116. Haohua Chemical Semiconductor Grade Etching Gas Product Overview
- Table 117. Haohua Chemical Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 118. Haohua Chemical Business Overview
- Table 119. Haohua Chemical Recent Developments
- Table 120. Zibo Feiyuan Chemical Basic Information
- Table 121. Zibo Feiyuan Chemical Semiconductor Grade Etching Gas Product Overview
- Table 122. Zibo Feiyuan Chemical Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 123. Zibo Feiyuan Chemical Business Overview
- Table 124. Zibo Feiyuan Chemical Recent Developments
- Table 125. Kemeite (Yoke Technology) Basic Information
- Table 126. Kemeite (Yoke Technology) Semiconductor Grade Etching Gas Product Overview
- Table 127. Kemeite (Yoke Technology) Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 128. Kemeite (Yoke Technology) Business Overview
- Table 129. Kemeite (Yoke Technology) Recent Developments
- Table 130. Solvay Basic Information
- Table 131. Solvay Semiconductor Grade Etching Gas Product Overview
- Table 132. Solvay Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 133. Solvay Business Overview
- Table 134. Solvay Recent Developments

- Table 135. Huate Gas Basic Information
- Table 136. Huate Gas Semiconductor Grade Etching Gas Product Overview
- Table 137. Huate Gas Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 138. Huate Gas Business Overview
- Table 139. Huate Gas Recent Developments
- Table 140. Yongjing Technology Basic Information
- Table 141. Yongjing Technology Semiconductor Grade Etching Gas Product Overview
- Table 142. Yongjing Technology Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 143. Yongjing Technology Business Overview
- Table 144. Yongjing Technology Recent Developments
- Table 145. Air Products Basic Information
- Table 146. Air Products Semiconductor Grade Etching Gas Product Overview
- Table 147. Air Products Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 148. Air Products Business Overview
- Table 149. Air Products Recent Developments
- Table 150. Jinhong Gas Basic Information
- Table 151. Jinhong Gas Semiconductor Grade Etching Gas Product Overview
- Table 152. Jinhong Gas Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 153. Jinhong Gas Business Overview
- Table 154. Jinhong Gas Recent Developments
- Table 155. Concorde Specialty Gases Basic Information
- Table 156. Concorde Specialty Gases Semiconductor Grade Etching Gas Product Overview
- Table 157. Concorde Specialty Gases Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 158. Concorde Specialty Gases Business Overview
- Table 159. Concorde Specialty Gases Recent Developments
- Table 160. Linggas Basic Information
- Table 161. Linggas Semiconductor Grade Etching Gas Product Overview
- Table 162. Linggas Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 163. Linggas Business Overview
- Table 164. Linggas Recent Developments
- Table 165. Foosung Basic Information
- Table 166. Foosung Semiconductor Grade Etching Gas Product Overview

Table 167. Foosung Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 168. Foosung Business Overview

Table 169. Foosung Recent Developments

Table 170. Wonik Materials Basic Information

Table 171. Wonik Materials Semiconductor Grade Etching Gas Product Overview

Table 172. Wonik Materials Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 173. Wonik Materials Business Overview

Table 174. Wonik Materials Recent Developments

Table 175. DIG AIRGAS Basic Information

Table 176. DIG AIRGAS Semiconductor Grade Etching Gas Product Overview

Table 177. DIG AIRGAS Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 178. DIG AIRGAS Business Overview

Table 179. DIG AIRGAS Recent Developments

Table 180. TEMC Basic Information

Table 181. TEMC Semiconductor Grade Etching Gas Product Overview

Table 182. TEMC Semiconductor Grade Etching Gas Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 183. TEMC Business Overview

Table 184. TEMC Recent Developments

Table 185. Global Semiconductor Grade Etching Gas Sales Forecast by Region (2026-2035) & (K Units)

Table 186. Global Semiconductor Grade Etching Gas Market Size Forecast by Region (2026-2035) & (M USD)

Table 187. North America Semiconductor Grade Etching Gas Sales Forecast by Country (2026-2035) & (K Units)

Table 188. North America Semiconductor Grade Etching Gas Market Size Forecast by Country (2026-2035) & (M USD)

Table 189. Europe Semiconductor Grade Etching Gas Sales Forecast by Country (2026-2035) & (K Units)

Table 190. Europe Semiconductor Grade Etching Gas Market Size Forecast by Country (2026-2035) & (M USD)

Table 191. Asia Pacific Semiconductor Grade Etching Gas Sales Forecast by Region (2026-2035) & (K Units)

Table 192. Asia Pacific Semiconductor Grade Etching Gas Market Size Forecast by Region (2026-2035) & (M USD)

Table 193. South America Semiconductor Grade Etching Gas Sales Forecast by

Country (2026-2035) & (K Units)

Table 194. South America Semiconductor Grade Etching Gas Market Size Forecast by Country (2026-2035) & (M USD)

Table 195. Middle East and Africa Semiconductor Grade Etching Gas Sales Forecast by Country (2026-2035) & (Units)

Table 196. Middle East and Africa Semiconductor Grade Etching Gas Market Size Forecast by Country (2026-2035) & (M USD)

Table 197. Global Semiconductor Grade Etching Gas Sales Forecast by Type (2026-2035) & (K Units)

Table 198. Global Semiconductor Grade Etching Gas Market Size Forecast by Type (2026-2035) & (M USD)

Table 199. Global Semiconductor Grade Etching Gas Price Forecast by Type (2026-2035) & (USD/Unit)

Table 200. Global Semiconductor Grade Etching Gas Sales (K Units) Forecast by Application (2026-2035)

Table 201. Global Semiconductor Grade Etching Gas Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Semiconductor Grade Etching Gas
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Semiconductor Grade Etching Gas Market Size (M USD), 2025-2035
- Figure 5. Global Semiconductor Grade Etching Gas Market Size (M USD) (2020-2035)
- Figure 6. Global Semiconductor Grade Etching Gas Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Semiconductor Grade Etching Gas Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Semiconductor Grade Etching Gas Product Life Cycle
- Figure 13. Semiconductor Grade Etching Gas Sales Share by Manufacturers in 2025
- Figure 14. Global Semiconductor Grade Etching Gas Revenue Share by Manufacturers in 2025
- Figure 15. Semiconductor Grade Etching Gas Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Semiconductor Grade Etching Gas Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Semiconductor Grade Etching Gas Revenue in 2025
- Figure 18. Industry Chain Map of Semiconductor Grade Etching Gas
- Figure 19. Global Semiconductor Grade Etching Gas Market PEST Analysis
- Figure 20. Global Semiconductor Grade Etching Gas Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Semiconductor Grade Etching Gas Market Share by Type
- Figure 27. Sales Market Share of Semiconductor Grade Etching Gas by Type (2020-2025)
- Figure 28. Sales Market Share of Semiconductor Grade Etching Gas by Type in 2025
- Figure 29. Market Share of Semiconductor Grade Etching Gas by Type (2020-2025)

- Figure 30. Market Share of Semiconductor Grade Etching Gas by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global Semiconductor Grade Etching Gas Market Share by Application
- Figure 33. Global Semiconductor Grade Etching Gas Sales Market Share by Application (2020-2025)
- Figure 34. Global Semiconductor Grade Etching Gas Sales Market Share by Application in 2025
- Figure 35. Global Semiconductor Grade Etching Gas Market Share by Application (2020-2025)
- Figure 36. Global Semiconductor Grade Etching Gas Market Share by Application in 2025
- Figure 37. Global Semiconductor Grade Etching Gas Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Semiconductor Grade Etching Gas Sales Market Share by Region (2020-2025)
- Figure 39. Global Semiconductor Grade Etching Gas Market Size by Region (2020-2025)
- Figure 40. North America Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America Semiconductor Grade Etching Gas Sales Market Share by Country in 2024
- Figure 43. North America Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Semiconductor Grade Etching Gas Market Size by Country in 2024
- Figure 45. U.S. Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Semiconductor Grade Etching Gas Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada Semiconductor Grade Etching Gas Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Semiconductor Grade Etching Gas Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Semiconductor Grade Etching Gas Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe Semiconductor Grade Etching Gas Sales Market Share by Country in 2024

Figure 53. Europe Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Semiconductor Grade Etching Gas Market Size by Country in 2024

Figure 55. Germany Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Semiconductor Grade Etching Gas Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Semiconductor Grade Etching Gas Sales Market Share by Region in 2024

Figure 67. Asia Pacific Semiconductor Grade Etching Gas Market Size by Region in 2024

Figure 68. China Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Semiconductor Grade Etching Gas Sales and Growth Rate (K Units)

Figure 79. South America Semiconductor Grade Etching Gas Sales Market Share by Country in 2024

Figure 80. South America Semiconductor Grade Etching Gas Market Size and Growth Rate (M USD)

Figure 81. South America Semiconductor Grade Etching Gas Market Size by Country in 2024

Figure 82. Brazil Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Semiconductor Grade Etching Gas Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Semiconductor Grade Etching Gas Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Semiconductor Grade Etching Gas Market Size and

Growth Rate (M USD)

Figure 91. Middle East and Africa Semiconductor Grade Etching Gas Market Size by Region in 2024

Figure 92. Saudi Arabia Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Semiconductor Grade Etching Gas Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Semiconductor Grade Etching Gas Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Semiconductor Grade Etching Gas Production Market Share by Region (2020-2025)

Figure 103. North America Semiconductor Grade Etching Gas Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Semiconductor Grade Etching Gas Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Semiconductor Grade Etching Gas Production (K Units) Growth Rate (2020-2025)

Figure 106. China Semiconductor Grade Etching Gas Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Semiconductor Grade Etching Gas Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Semiconductor Grade Etching Gas Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Semiconductor Grade Etching Gas Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Semiconductor Grade Etching Gas Market Share Forecast by Type (2026-2035)

Figure 111. Global Semiconductor Grade Etching Gas Sales Forecast by Application (2026-2035)

Figure 112. Global Semiconductor Grade Etching Gas Market Share Forecast by Application (2026-2035)

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