

Global BF₃ Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global BF₃ market size is expected to reach \$ 979 million by 2032, rising at a market growth of 10.3% CAGR during the forecast period (2026-2032).

Boron Trifluoride (BF₃) is a platform material connecting fluorine-boron chemicals, electronic specialty gases, and boron isotope materials. From a commercial perspective, Boron Trifluoride should not be treated as a single bulk chemical. It is better understood as a product family segmented by purity grade, isotope enrichment, packaging system, and customer qualification requirements. Industrial-grade Boron Trifluoride is mainly used as a strong Lewis acid catalyst in chemical synthesis, polymerization, petrochemical catalysis, fine chemicals, and selected pharmaceutical intermediate processes. Electronic-grade Boron Trifluoride is mainly used in semiconductor ion implantation, boron doping, and selected display and electronic manufacturing processes, where moisture, oxygen, metal impurities, particles, cylinder cleanliness, and batch consistency are critical. Boron isotope-grade Boron Trifluoride, including ¹¹BF₃ and ¹⁰BF₃, further extends into advanced semiconductors, nuclear industry and neutron detection, optical fiber preforms, and specialty glass materials. The value chain of Boron Trifluoride therefore moves upward from industrial-scale supply to electronic-grade deep purification and then to isotope-grade high-value qualification.

The Top 5 suppliers generated approximately USD 205.7 million of revenue in 2025, representing about 48.0% of the global Boron Trifluoride market. Solstice Advanced Materials, Linde, 3M, Entegris, and Gulbrandsen formed the first revenue tier in 2025. 3M and Entegris were not the largest suppliers by volume, but their exposure to electronic-grade and isotope-grade Boron Trifluoride lifted their revenue weight significantly above their volume weight.

The regional structure of Boron Trifluoride remains supported by North America, Europe, and China on the production side, while demand is increasingly concentrated in Asia-Pacific. North America produced approximately 7,056 tons of Boron Trifluoride in 2025, accounting for around 35.0% of global output; Europe produced approximately 5,169 tons, or about 25.6%; China produced approximately 4,652 tons, or about 23.0%; Japan and Taiwan accounted for approximately 6.6% and 4.2%, respectively. On the sales side, Asia-Pacific recorded approximately 11.0 thousand tons of Boron Trifluoride sales in 2025, representing about 54.5% of global volume, well above its production share. This indicates that Asia-Pacific, especially mainland China, Taiwan, South Korea, and Japan, has become the core demand region for Boron Trifluoride, supported by semiconductor, electronic materials, display, battery materials, and fine chemical clusters.

Product segmentation indicates that the Boron Trifluoride market is shifting from an industrial-grade volume logic to an electronic-grade and isotope-grade value logic. In 2025, industrial-grade Boron Trifluoride sales volume reached approximately 16.5 thousand tons, accounting for about 81.5% of global volume, but revenue was approximately USD 194.1 million, representing only about 45.3% of the market. Electronic-grade Boron Trifluoride sales volume was approximately 3,471 tons, accounting for about 17.2% of volume, while revenue reached approximately USD 207.1 million, or about 48.3% of the market, making it the largest revenue category. Boron isotope-grade Boron Trifluoride sales volume was only approximately 260 tons, or around 1.3% of volume, but revenue reached approximately USD 27.5 million, accounting for about 6.4% of total revenue. The pricing gap is even more direct: in 2025, industrial-grade Boron Trifluoride averaged approximately USD 11.8 thousand per ton, electronic grade approximately USD 59.7 thousand per ton, and isotope grade approximately USD 105.9 thousand per ton.

Application segmentation shows a clear pattern in the Boron Trifluoride market: volume is driven by chemicals, while revenue is driven by electronics. In 2025, chemical, polymerization, and petrochemical catalysis consumed approximately 10.2 thousand tons, accounting for about 50.4% of global volume and remaining the largest volume application. However, revenue from this segment was approximately USD 104.2 million, or only about 24.3% of the market. Electronics, semiconductors, and display applications consumed approximately 4,634 tons, or about 23.0% of global volume, but generated approximately USD 237.1 million, representing around 55.3% of total revenue. Pharmaceutical, agrochemical, and fine chemical synthesis consumed approximately 2,580 tons, accounting for about 12.8% of volume, with revenue of around USD 26.2 million, or 6.1% of the market. Battery materials, nuclear industry and

neutron detection, and optical fiber, electronic glass, and specialty glass together represented smaller volume shares, but they have higher value density due to stricter specifications, higher purity requirements, and longer qualification cycles.

The competitive landscape is evolving from traditional industrial-grade supply toward high-purity electronic gases and boron isotope materials. Solstice Advanced Materials and Honeywell-related operations have accumulated capabilities in industrial-grade Boron Trifluoride and high-specification gases. 3M and Entegris have stronger exposure to 11BF₃, electronic-grade Boron Trifluoride, and semiconductor ion implantation materials. Linde and Air Liquide leverage global electronic gas customer systems, with advantages in high-purity gas supply, customer qualification, on-site services, and compliant delivery. Gulbrandsen, Arkema, and Stella Chemifa maintain stable supply positions in industrial-grade Boron Trifluoride, fine chemicals, and catalytic applications. Among Chinese companies, Shandong Heyi Gas has a broader portfolio across industrial-grade, electronic-grade, and boron isotope-grade Boron Trifluoride; Shenzhen Sunxing Chemicals and Shandong Qianming New Material are strengthening industrial-grade Boron Trifluoride capacity; Do-Fluoride, Jiangsu Zhengbonuo Technology Development, Shandong Zhongshan Photoelectric Materials, and Ion Electronic Materials are more aligned with electronic-grade and boron isotope-grade material pathways.

Recent industry developments indicate that the strategic role of Boron Trifluoride is extending from chemical catalysis toward semiconductor key materials and boron isotope materials. Global wafer fab expansion, mature-node capacity migration, localization of ion implantation materials, neutron detection upgrades, and high-end optoelectronic material demand are jointly increasing the relevance of electronic-grade and isotope-grade Boron Trifluoride. At the same time, new Chinese capacity is mainly focused on industrial-grade Boron Trifluoride, electronic-grade purification, and boron isotope material platforms, improving local supply capability. However, high-end commercialization still depends on customer qualification, batch stability, isotope enrichment control, clean packaging systems, and compliant hazardous chemical delivery. The next stage of competition in Boron Trifluoride will not be a simple capacity race, but an integrated competition around purity systems, customer access, isotope control, supply security, and global delivery capability.

This report studies the global BF₃ production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for BF₃ and

provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of BF3 that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global BF3 total production and demand, 2021-2032, (Tons)

Global BF3 total production value, 2021-2032, (USD Million)

Global BF3 production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global BF3 consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: BF3 domestic production, consumption, key domestic manufacturers and share

Global BF3 production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global BF3 production by Grade, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global BF3 production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global BF3 market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Solstice Advanced Materials, Honeywell, 3M, Linde, Entegris, Gulbrandsen, Arkema, Air Liquide, Gruppo SIAD, Stella Chemifa, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World BF3 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Grade, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global BF3 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global BF3 Market, Segmentation by Grade:

Industrial Grade

Electronic Grade

Boron Isotope Grade

Global BF3 Market, Segmentation by Purity:

3N

4N

5N

Others

Global BF₃ Market, Segmentation by Synthesis Method:

Fluorite-boron anhydride-concentrated sulfuric acid Method

Fluoroborate Thermal Decomposition Method

Boron Trifluoride Complex Method

Global BF₃ Market, Segmentation by Application:

Chemical/Polymerization/Petrochemical Catalysis

Electronics/Semiconductor/Display

Pharmaceutical/Agrochemical/Fine Chemical Synthesis

New Energy Battery Material

Nuclear Industry/Neutron Detection

Fiber Optics/Electronic Glass/Specialty Glass

Others

Companies Profiled:

Solstice Advanced Materials

Honeywell

3M

Linde

Entegris

Gulbrandsen

Arkema

Air Liquide

Gruppo SIAD

Stella Chemifa

Air Gas Electronic Materials (AGEM)

Ion Electronic Materials

Shandong Heyi Gas

Dalian Special Gases

Shandong Zhongshan Photoelectric Materials

Qingdao Sains Gas

Do-Fluoride

Shenzhen Sunxing Chemicals

Jiangsu Zhengbonuo Technology Development

Shandong Qianming New Material

Key Questions Answered:

1. How big is the global BF₃ market?
2. What is the demand of the global BF₃ market?
3. What is the year over year growth of the global BF₃ market?
4. What is the production and production value of the global BF₃ market?
5. Who are the key producers in the global BF₃ market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 BF3 Introduction
- 1.2 World BF3 Supply & Forecast
 - 1.2.1 World BF3 Production Value (2021 & 2025 & 2032)
 - 1.2.2 World BF3 Production (2021-2032)
 - 1.2.3 World BF3 Pricing Trends (2021-2032)
- 1.3 World BF3 Production by Region (Based on Production Site)
 - 1.3.1 World BF3 Production Value by Region (2021-2032)
 - 1.3.2 World BF3 Production by Region (2021-2032)
 - 1.3.3 World BF3 Average Price by Region (2021-2032)
 - 1.3.4 North America BF3 Production (2021-2032)
 - 1.3.5 Europe BF3 Production (2021-2032)
 - 1.3.6 China BF3 Production (2021-2032)
 - 1.3.7 Japan BF3 Production (2021-2032)
 - 1.3.8 Taiwan BF3 Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 BF3 Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 BF3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World BF3 Demand (2021-2032)
- 2.2 World BF3 Consumption by Region
 - 2.2.1 World BF3 Consumption by Region (2021-2026)
 - 2.2.2 World BF3 Consumption Forecast by Region (2027-2032)
- 2.3 United States BF3 Consumption (2021-2032)
- 2.4 China BF3 Consumption (2021-2032)
- 2.5 Europe BF3 Consumption (2021-2032)
- 2.6 Japan BF3 Consumption (2021-2032)
- 2.7 South Korea BF3 Consumption (2021-2032)
- 2.8 ASEAN BF3 Consumption (2021-2032)
- 2.9 India BF3 Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World BF3 Production Value by Manufacturer (2021-2026)

3.2 World BF3 Production by Manufacturer (2021-2026)

3.3 World BF3 Average Price by Manufacturer (2021-2026)

3.4 BF3 Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global BF3 Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for BF3 in 2025

3.5.3 Global Concentration Ratios (CR8) for BF3 in 2025

3.6 BF3 Market: Overall Company Footprint Analysis

3.6.1 BF3 Market: Region Footprint

3.6.2 BF3 Market: Company Product Type Footprint

3.6.3 BF3 Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: BF3 Production Value Comparison

4.1.1 United States VS China: BF3 Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: BF3 Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: BF3 Production Comparison

4.2.1 United States VS China: BF3 Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: BF3 Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: BF3 Consumption Comparison

4.3.1 United States VS China: BF3 Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: BF3 Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based BF3 Manufacturers and Market Share, 2021-2026

4.4.1 United States Based BF3 Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers BF3 Production Value (2021-2026)

4.4.3 United States Based Manufacturers BF3 Production (2021-2026)

4.5 China Based BF3 Manufacturers and Market Share

4.5.1 China Based BF3 Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers BF3 Production Value (2021-2026)

4.5.3 China Based Manufacturers BF3 Production (2021-2026)

4.6 Rest of World Based BF3 Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based BF3 Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers BF3 Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers BF3 Production (2021-2026)

5 MARKET ANALYSIS BY GRADE

5.1 World BF3 Market Size Overview by Grade: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Grade

5.2.1 Industrial Grade

5.2.2 Electronic Grade

5.2.3 Boron Isotope Grade

5.3 Market Segment by Grade

5.3.1 World BF3 Production by Grade (2021-2032)

5.3.2 World BF3 Production Value by Grade (2021-2032)

5.3.3 World BF3 Average Price by Grade (2021-2032)

6 MARKET ANALYSIS BY PURITY

6.1 World BF3 Market Size Overview by Purity: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Purity

6.2.1 3N

6.2.2 4N

6.2.3 5N

6.2.4 Others

6.3 Market Segment by Purity

6.3.1 World BF3 Production by Purity (2021-2032)

6.3.2 World BF3 Production Value by Purity (2021-2032)

6.3.3 World BF3 Average Price by Purity (2021-2032)

7 MARKET ANALYSIS BY SYNTHESIS METHOD

7.1 World BF3 Market Size Overview by Synthesis Method: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Synthesis Method

7.2.1 Fluorite-boron anhydride-concentrated sulfuric acid Method

7.2.2 Fluoroborate Thermal Decomposition Method

7.2.3 Boron Trifluoride Complex Method

7.3 Market Segment by Synthesis Method

7.3.1 World BF₃ Production by Synthesis Method (2021-2032)

7.3.2 World BF₃ Production Value by Synthesis Method (2021-2032)

7.3.3 World BF₃ Average Price by Synthesis Method (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World BF₃ Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Chemical/Polymerization/Petrochemical Catalysis

8.2.2 Electronics/Semiconductor/Display

8.2.3 Pharmaceutical/Agrochemical/Fine Chemical Synthesis

8.2.4 New Energy Battery Material

8.2.5 Nuclear Industry/Neutron Detection

8.2.6 Fiber Optics/Electronic Glass/Specialty Glass

8.2.7 Others

8.3 Market Segment by Application

8.3.1 World BF₃ Production by Application (2021-2032)

8.3.2 World BF₃ Production Value by Application (2021-2032)

8.3.3 World BF₃ Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Solstice Advanced Materials

9.1.1 Solstice Advanced Materials Details

9.1.2 Solstice Advanced Materials Major Business

9.1.3 Solstice Advanced Materials BF₃ Product and Services

9.1.4 Solstice Advanced Materials BF₃ Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Solstice Advanced Materials Recent Developments/Updates

9.1.6 Solstice Advanced Materials Competitive Strengths & Weaknesses

9.2 Honeywell

9.2.1 Honeywell Details

9.2.2 Honeywell Major Business

9.2.3 Honeywell BF₃ Product and Services

9.2.4 Honeywell BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Honeywell Recent Developments/Updates

9.2.6 Honeywell Competitive Strengths & Weaknesses

9.3 3M

9.3.1 3M Details

9.3.2 3M Major Business

9.3.3 3M BF3 Product and Services

9.3.4 3M BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 3M Recent Developments/Updates

9.3.6 3M Competitive Strengths & Weaknesses

9.4 Linde

9.4.1 Linde Details

9.4.2 Linde Major Business

9.4.3 Linde BF3 Product and Services

9.4.4 Linde BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Linde Recent Developments/Updates

9.4.6 Linde Competitive Strengths & Weaknesses

9.5 Entegris

9.5.1 Entegris Details

9.5.2 Entegris Major Business

9.5.3 Entegris BF3 Product and Services

9.5.4 Entegris BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Entegris Recent Developments/Updates

9.5.6 Entegris Competitive Strengths & Weaknesses

9.6 Gulbrandsen

9.6.1 Gulbrandsen Details

9.6.2 Gulbrandsen Major Business

9.6.3 Gulbrandsen BF3 Product and Services

9.6.4 Gulbrandsen BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Gulbrandsen Recent Developments/Updates

9.6.6 Gulbrandsen Competitive Strengths & Weaknesses

9.7 Arkema

9.7.1 Arkema Details

9.7.2 Arkema Major Business

9.7.3 Arkema BF3 Product and Services

9.7.4 Arkema BF3 Production, Price, Value, Gross Margin and Market Share

(2021-2026)

9.7.5 Arkema Recent Developments/Updates

9.7.6 Arkema Competitive Strengths & Weaknesses

9.8 Air Liquide

9.8.1 Air Liquide Details

9.8.2 Air Liquide Major Business

9.8.3 Air Liquide BF3 Product and Services

9.8.4 Air Liquide BF3 Production, Price, Value, Gross Margin and Market Share

(2021-2026)

9.8.5 Air Liquide Recent Developments/Updates

9.8.6 Air Liquide Competitive Strengths & Weaknesses

9.9 Gruppo SIAD

9.9.1 Gruppo SIAD Details

9.9.2 Gruppo SIAD Major Business

9.9.3 Gruppo SIAD BF3 Product and Services

9.9.4 Gruppo SIAD BF3 Production, Price, Value, Gross Margin and Market Share

(2021-2026)

9.9.5 Gruppo SIAD Recent Developments/Updates

9.9.6 Gruppo SIAD Competitive Strengths & Weaknesses

9.10 Stella Chemifa

9.10.1 Stella Chemifa Details

9.10.2 Stella Chemifa Major Business

9.10.3 Stella Chemifa BF3 Product and Services

9.10.4 Stella Chemifa BF3 Production, Price, Value, Gross Margin and Market Share

(2021-2026)

9.10.5 Stella Chemifa Recent Developments/Updates

9.10.6 Stella Chemifa Competitive Strengths & Weaknesses

9.11 Air Gas Electronic Materials (AGEM)

9.11.1 Air Gas Electronic Materials (AGEM) Details

9.11.2 Air Gas Electronic Materials (AGEM) Major Business

9.11.3 Air Gas Electronic Materials (AGEM) BF3 Product and Services

9.11.4 Air Gas Electronic Materials (AGEM) BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Air Gas Electronic Materials (AGEM) Recent Developments/Updates

9.11.6 Air Gas Electronic Materials (AGEM) Competitive Strengths & Weaknesses

9.12 Ion Electronic Materials

9.12.1 Ion Electronic Materials Details

9.12.2 Ion Electronic Materials Major Business

9.12.3 Ion Electronic Materials BF3 Product and Services

9.12.4 Ion Electronic Materials BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Ion Electronic Materials Recent Developments/Updates

9.12.6 Ion Electronic Materials Competitive Strengths & Weaknesses

9.13 Shandong Heyi Gas

9.13.1 Shandong Heyi Gas Details

9.13.2 Shandong Heyi Gas Major Business

9.13.3 Shandong Heyi Gas BF3 Product and Services

9.13.4 Shandong Heyi Gas BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Shandong Heyi Gas Recent Developments/Updates

9.13.6 Shandong Heyi Gas Competitive Strengths & Weaknesses

9.14 Dalian Special Gases

9.14.1 Dalian Special Gases Details

9.14.2 Dalian Special Gases Major Business

9.14.3 Dalian Special Gases BF3 Product and Services

9.14.4 Dalian Special Gases BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Dalian Special Gases Recent Developments/Updates

9.14.6 Dalian Special Gases Competitive Strengths & Weaknesses

9.15 Shandong Zhongshan Photoelectric Materials

9.15.1 Shandong Zhongshan Photoelectric Materials Details

9.15.2 Shandong Zhongshan Photoelectric Materials Major Business

9.15.3 Shandong Zhongshan Photoelectric Materials BF3 Product and Services

9.15.4 Shandong Zhongshan Photoelectric Materials BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Shandong Zhongshan Photoelectric Materials Recent Developments/Updates

9.15.6 Shandong Zhongshan Photoelectric Materials Competitive Strengths & Weaknesses

9.16 Qingdao Sains Gas

9.16.1 Qingdao Sains Gas Details

9.16.2 Qingdao Sains Gas Major Business

9.16.3 Qingdao Sains Gas BF3 Product and Services

9.16.4 Qingdao Sains Gas BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 Qingdao Sains Gas Recent Developments/Updates

9.16.6 Qingdao Sains Gas Competitive Strengths & Weaknesses

9.17 Do-Fluoride

9.17.1 Do-Fluoride Details

- 9.17.2 Do-Fluoride Major Business
- 9.17.3 Do-Fluoride BF3 Product and Services
- 9.17.4 Do-Fluoride BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.17.5 Do-Fluoride Recent Developments/Updates
- 9.17.6 Do-Fluoride Competitive Strengths & Weaknesses
- 9.18 Shenzhen Sunxing Chemicals
- 9.18.1 Shenzhen Sunxing Chemicals Details
- 9.18.2 Shenzhen Sunxing Chemicals Major Business
- 9.18.3 Shenzhen Sunxing Chemicals BF3 Product and Services
- 9.18.4 Shenzhen Sunxing Chemicals BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.18.5 Shenzhen Sunxing Chemicals Recent Developments/Updates
- 9.18.6 Shenzhen Sunxing Chemicals Competitive Strengths & Weaknesses
- 9.19 Jiangsu Zhengbonuo Technology Development
- 9.19.1 Jiangsu Zhengbonuo Technology Development Details
- 9.19.2 Jiangsu Zhengbonuo Technology Development Major Business
- 9.19.3 Jiangsu Zhengbonuo Technology Development BF3 Product and Services
- 9.19.4 Jiangsu Zhengbonuo Technology Development BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.19.5 Jiangsu Zhengbonuo Technology Development Recent Developments/Updates
- 9.19.6 Jiangsu Zhengbonuo Technology Development Competitive Strengths & Weaknesses
- 9.20 Shandong Qianming New Material
- 9.20.1 Shandong Qianming New Material Details
- 9.20.2 Shandong Qianming New Material Major Business
- 9.20.3 Shandong Qianming New Material BF3 Product and Services
- 9.20.4 Shandong Qianming New Material BF3 Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.20.5 Shandong Qianming New Material Recent Developments/Updates
- 9.20.6 Shandong Qianming New Material Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 BF3 Industry Chain
- 10.2 BF3 Upstream Analysis
 - 10.2.1 BF3 Core Raw Materials
 - 10.2.2 Main Manufacturers of BF3 Core Raw Materials
- 10.3 Midstream Analysis

- 10.4 Downstream Analysis
- 10.5 BF3 Production Mode
- 10.6 BF3 Procurement Model
- 10.7 BF3 Industry Sales Model and Sales Channels
 - 10.7.1 BF3 Sales Model
 - 10.7.2 BF3 Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World BF3 Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World BF3 Production Value by Region (2021-2026) & (USD Million)
- Table 3. World BF3 Production Value by Region (2027-2032) & (USD Million)
- Table 4. World BF3 Production Value Market Share by Region (2021-2026)
- Table 5. World BF3 Production Value Market Share by Region (2027-2032)
- Table 6. World BF3 Production by Region (2021-2026) & (Tons)
- Table 7. World BF3 Production by Region (2027-2032) & (Tons)
- Table 8. World BF3 Production Market Share by Region (2021-2026)
- Table 9. World BF3 Production Market Share by Region (2027-2032)
- Table 10. World BF3 Average Price by Region (2021-2026) & (US\$/Ton)
- Table 11. World BF3 Average Price by Region (2027-2032) & (US\$/Ton)
- Table 12. BF3 Major Market Trends
- Table 13. World BF3 Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
- Table 14. World BF3 Consumption by Region (2021-2026) & (Tons)
- Table 15. World BF3 Consumption Forecast by Region (2027-2032) & (Tons)
- Table 16. World BF3 Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key BF3 Producers in 2025
- Table 18. World BF3 Production by Manufacturer (2021-2026) & (Tons)
- Table 19. Production Market Share of Key BF3 Producers in 2025
- Table 20. World BF3 Average Price by Manufacturer (2021-2026) & (US\$/Ton)
- Table 21. Global BF3 Company Evaluation Quadrant
- Table 22. World BF3 Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and BF3 Production Site of Key Manufacturer
- Table 24. BF3 Market: Company Product Type Footprint
- Table 25. BF3 Market: Company Product Application Footprint
- Table 26. BF3 Competitive Factors
- Table 27. BF3 New Entrant and Capacity Expansion Plans
- Table 28. BF3 Mergers & Acquisitions Activity
- Table 29. United States VS China BF3 Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 30. United States VS China BF3 Production Comparison, (2021 & 2025 & 2032) & (Tons)
- Table 31. United States VS China BF3 Consumption Comparison, (2021 & 2025 &

2032) & (Tons)

Table 32. United States Based BF3 Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers BF3 Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers BF3 Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers BF3 Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers BF3 Production Market Share (2021-2026)

Table 37. China Based BF3 Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers BF3 Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers BF3 Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers BF3 Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers BF3 Production Market Share (2021-2026)

Table 42. Rest of World Based BF3 Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers BF3 Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers BF3 Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers BF3 Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers BF3 Production Market Share (2021-2026)

Table 47. World BF3 Production Value by Grade, (USD Million), 2021 & 2025 & 2032

Table 48. World BF3 Production by Grade (2021-2026) & (Tons)

Table 49. World BF3 Production by Grade (2027-2032) & (Tons)

Table 50. World BF3 Production Value by Grade (2021-2026) & (USD Million)

Table 51. World BF3 Production Value by Grade (2027-2032) & (USD Million)

Table 52. World BF3 Average Price by Grade (2021-2026) & (US\$/Ton)

Table 53. World BF3 Average Price by Grade (2027-2032) & (US\$/Ton)

Table 54. World BF3 Production Value by Purity, (USD Million), 2021 & 2025 & 2032

Table 55. World BF3 Production by Purity (2021-2026) & (Tons)

Table 56. World BF3 Production by Purity (2027-2032) & (Tons)

Table 57. World BF3 Production Value by Purity (2021-2026) & (USD Million)

Table 58. World BF3 Production Value by Purity (2027-2032) & (USD Million)

Table 59. World BF3 Average Price by Purity (2021-2026) & (US\$/Ton)

Table 60. World BF3 Average Price by Purity (2027-2032) & (US\$/Ton)
Table 61. World BF3 Production Value by Synthesis Method, (USD Million), 2021 & 2025 & 2032
Table 62. World BF3 Production by Synthesis Method (2021-2026) & (Tons)
Table 63. World BF3 Production by Synthesis Method (2027-2032) & (Tons)
Table 64. World BF3 Production Value by Synthesis Method (2021-2026) & (USD Million)
Table 65. World BF3 Production Value by Synthesis Method (2027-2032) & (USD Million)
Table 66. World BF3 Average Price by Synthesis Method (2021-2026) & (US\$/Ton)
Table 67. World BF3 Average Price by Synthesis Method (2027-2032) & (US\$/Ton)
Table 68. World BF3 Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World BF3 Production by Application (2021-2026) & (Tons)
Table 70. World BF3 Production by Application (2027-2032) & (Tons)
Table 71. World BF3 Production Value by Application (2021-2026) & (USD Million)
Table 72. World BF3 Production Value by Application (2027-2032) & (USD Million)
Table 73. World BF3 Average Price by Application (2021-2026) & (US\$/Ton)
Table 74. World BF3 Average Price by Application (2027-2032) & (US\$/Ton)
Table 75. Solstice Advanced Materials Basic Information, Manufacturing Base and Competitors
Table 76. Solstice Advanced Materials Major Business
Table 77. Solstice Advanced Materials BF3 Product and Services
Table 78. Solstice Advanced Materials BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Solstice Advanced Materials Recent Developments/Updates
Table 80. Solstice Advanced Materials Competitive Strengths & Weaknesses
Table 81. Honeywell Basic Information, Manufacturing Base and Competitors
Table 82. Honeywell Major Business
Table 83. Honeywell BF3 Product and Services
Table 84. Honeywell BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Honeywell Recent Developments/Updates
Table 86. Honeywell Competitive Strengths & Weaknesses
Table 87. 3M Basic Information, Manufacturing Base and Competitors
Table 88. 3M Major Business
Table 89. 3M BF3 Product and Services
Table 90. 3M BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. 3M Recent Developments/Updates
Table 92. 3M Competitive Strengths & Weaknesses
Table 93. Linde Basic Information, Manufacturing Base and Competitors
Table 94. Linde Major Business
Table 95. Linde BF3 Product and Services
Table 96. Linde BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Linde Recent Developments/Updates
Table 98. Linde Competitive Strengths & Weaknesses
Table 99. Entegris Basic Information, Manufacturing Base and Competitors
Table 100. Entegris Major Business
Table 101. Entegris BF3 Product and Services
Table 102. Entegris BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Entegris Recent Developments/Updates
Table 104. Entegris Competitive Strengths & Weaknesses
Table 105. Gulbrandsen Basic Information, Manufacturing Base and Competitors
Table 106. Gulbrandsen Major Business
Table 107. Gulbrandsen BF3 Product and Services
Table 108. Gulbrandsen BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Gulbrandsen Recent Developments/Updates
Table 110. Gulbrandsen Competitive Strengths & Weaknesses
Table 111. Arkema Basic Information, Manufacturing Base and Competitors
Table 112. Arkema Major Business
Table 113. Arkema BF3 Product and Services
Table 114. Arkema BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Arkema Recent Developments/Updates
Table 116. Arkema Competitive Strengths & Weaknesses
Table 117. Air Liquide Basic Information, Manufacturing Base and Competitors
Table 118. Air Liquide Major Business
Table 119. Air Liquide BF3 Product and Services
Table 120. Air Liquide BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Air Liquide Recent Developments/Updates
Table 122. Air Liquide Competitive Strengths & Weaknesses
Table 123. Gruppo SIAD Basic Information, Manufacturing Base and Competitors
Table 124. Gruppo SIAD Major Business

Table 125. Gruppo SIAD BF3 Product and Services
Table 126. Gruppo SIAD BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Gruppo SIAD Recent Developments/Updates
Table 128. Gruppo SIAD Competitive Strengths & Weaknesses
Table 129. Stella Chemifa Basic Information, Manufacturing Base and Competitors
Table 130. Stella Chemifa Major Business
Table 131. Stella Chemifa BF3 Product and Services
Table 132. Stella Chemifa BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Stella Chemifa Recent Developments/Updates
Table 134. Stella Chemifa Competitive Strengths & Weaknesses
Table 135. Air Gas Electronic Materials (AGEM) Basic Information, Manufacturing Base and Competitors
Table 136. Air Gas Electronic Materials (AGEM) Major Business
Table 137. Air Gas Electronic Materials (AGEM) BF3 Product and Services
Table 138. Air Gas Electronic Materials (AGEM) BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Air Gas Electronic Materials (AGEM) Recent Developments/Updates
Table 140. Air Gas Electronic Materials (AGEM) Competitive Strengths & Weaknesses
Table 141. Ion Electronic Materials Basic Information, Manufacturing Base and Competitors
Table 142. Ion Electronic Materials Major Business
Table 143. Ion Electronic Materials BF3 Product and Services
Table 144. Ion Electronic Materials BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Ion Electronic Materials Recent Developments/Updates
Table 146. Ion Electronic Materials Competitive Strengths & Weaknesses
Table 147. Shandong Heyi Gas Basic Information, Manufacturing Base and Competitors
Table 148. Shandong Heyi Gas Major Business
Table 149. Shandong Heyi Gas BF3 Product and Services
Table 150. Shandong Heyi Gas BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Shandong Heyi Gas Recent Developments/Updates
Table 152. Shandong Heyi Gas Competitive Strengths & Weaknesses
Table 153. Dalian Special Gases Basic Information, Manufacturing Base and Competitors

Table 154. Dalian Special Gases Major Business
Table 155. Dalian Special Gases BF3 Product and Services
Table 156. Dalian Special Gases BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Dalian Special Gases Recent Developments/Updates
Table 158. Dalian Special Gases Competitive Strengths & Weaknesses
Table 159. Shandong Zhongshan Photoelectric Materials Basic Information, Manufacturing Base and Competitors
Table 160. Shandong Zhongshan Photoelectric Materials Major Business
Table 161. Shandong Zhongshan Photoelectric Materials BF3 Product and Services
Table 162. Shandong Zhongshan Photoelectric Materials BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Shandong Zhongshan Photoelectric Materials Recent Developments/Updates
Table 164. Shandong Zhongshan Photoelectric Materials Competitive Strengths & Weaknesses
Table 165. Qingdao Sains Gas Basic Information, Manufacturing Base and Competitors
Table 166. Qingdao Sains Gas Major Business
Table 167. Qingdao Sains Gas BF3 Product and Services
Table 168. Qingdao Sains Gas BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. Qingdao Sains Gas Recent Developments/Updates
Table 170. Qingdao Sains Gas Competitive Strengths & Weaknesses
Table 171. Do-Fluoride Basic Information, Manufacturing Base and Competitors
Table 172. Do-Fluoride Major Business
Table 173. Do-Fluoride BF3 Product and Services
Table 174. Do-Fluoride BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Do-Fluoride Recent Developments/Updates
Table 176. Do-Fluoride Competitive Strengths & Weaknesses
Table 177. Shenzhen Sunxing Chemicals Basic Information, Manufacturing Base and Competitors
Table 178. Shenzhen Sunxing Chemicals Major Business
Table 179. Shenzhen Sunxing Chemicals BF3 Product and Services
Table 180. Shenzhen Sunxing Chemicals BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Shenzhen Sunxing Chemicals Recent Developments/Updates
Table 182. Shenzhen Sunxing Chemicals Competitive Strengths & Weaknesses

Table 183. Jiangsu Zhengbonuo Technology Development Basic Information, Manufacturing Base and Competitors

Table 184. Jiangsu Zhengbonuo Technology Development Major Business

Table 185. Jiangsu Zhengbonuo Technology Development BF3 Product and Services

Table 186. Jiangsu Zhengbonuo Technology Development BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. Jiangsu Zhengbonuo Technology Development Recent Developments/Updates

Table 188. Jiangsu Zhengbonuo Technology Development Competitive Strengths & Weaknesses

Table 189. Shandong Qianming New Material Basic Information, Manufacturing Base and Competitors

Table 190. Shandong Qianming New Material Major Business

Table 191. Shandong Qianming New Material BF3 Product and Services

Table 192. Shandong Qianming New Material BF3 Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Shandong Qianming New Material Recent Developments/Updates

Table 194. Shandong Qianming New Material Competitive Strengths & Weaknesses

Table 195. Global Key Players of BF3 Upstream (Raw Materials)

Table 196. Global BF3 Typical Customers

Table 197. BF3 Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. BF3 Picture

Figure 2. World BF3 Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World BF3 Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World BF3 Production (2021-2032) & (Tons)

Figure 5. World BF3 Average Price (2021-2032) & (US\$/Ton)

Figure 6. World BF3 Production Value Market Share by Region (2021-2032)

Figure 7. World BF3 Production Market Share by Region (2021-2032)

Figure 8. North America BF3 Production (2021-2032) & (Tons)

Figure 9. Europe BF3 Production (2021-2032) & (Tons)

Figure 10. China BF3 Production (2021-2032) & (Tons)

Figure 11. Japan BF3 Production (2021-2032) & (Tons)

Figure 12. Taiwan BF3 Production (2021-2032) & (Tons)

Figure 13. BF3 Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World BF3 Consumption (2021-2032) & (Tons)

Figure 16. World BF3 Consumption Market Share by Region (2021-2032)

Figure 17. United States BF3 Consumption (2021-2032) & (Tons)

Figure 18. China BF3 Consumption (2021-2032) & (Tons)

Figure 19. Europe BF3 Consumption (2021-2032) & (Tons)

Figure 20. Japan BF3 Consumption (2021-2032) & (Tons)

Figure 21. South Korea BF3 Consumption (2021-2032) & (Tons)

Figure 22. ASEAN BF3 Consumption (2021-2032) & (Tons)

Figure 23. India BF3 Consumption (2021-2032) & (Tons)

Figure 24. Producer Shipments of BF3 by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for BF3 Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for BF3 Markets in 2025

Figure 27. United States VS China: BF3 Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: BF3 Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: BF3 Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers BF3 Production Market Share 2025

Figure 31. China Based Manufacturers BF3 Production Market Share 2025

- Figure 32. Rest of World Based Manufacturers BF3 Production Market Share 2025
- Figure 33. World BF3 Production Value by Grade, (USD Million), 2021 & 2025 & 2032
- Figure 34. World BF3 Production Value Market Share by Grade in 2025
- Figure 35. Industrial Grade
- Figure 36. Electronic Grade
- Figure 37. Boron Isotope Grade
- Figure 38. World BF3 Production Market Share by Grade (2021-2032)
- Figure 39. World BF3 Production Value Market Share by Grade (2021-2032)
- Figure 40. World BF3 Average Price by Grade (2021-2032) & (US\$/Ton)
- Figure 41. World BF3 Production Value by Purity, (USD Million), 2021 & 2025 & 2032
- Figure 42. World BF3 Production Value Market Share by Purity in 2025
- Figure 43. 3N
- Figure 44. 4N
- Figure 45. 5N
- Figure 46. Others
- Figure 47. World BF3 Production Market Share by Purity (2021-2032)
- Figure 48. World BF3 Production Value Market Share by Purity (2021-2032)
- Figure 49. World BF3 Average Price by Purity (2021-2032) & (US\$/Ton)
- Figure 50. World BF3 Production Value by Synthesis Method, (USD Million), 2021 & 2025 & 2032
- Figure 51. World BF3 Production Value Market Share by Synthesis Method in 2025
- Figure 52. Fluorite-boron anhydride-concentrated sulfuric acid Method
- Figure 53. Fluoroborate Thermal Decomposition Method
- Figure 54. Boron Trifluoride Complex Method
- Figure 55. World BF3 Production Market Share by Synthesis Method (2021-2032)
- Figure 56. World BF3 Production Value Market Share by Synthesis Method (2021-2032)
- Figure 57. World BF3 Average Price by Synthesis Method (2021-2032) & (US\$/Ton)
- Figure 58. World BF3 Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 59. World BF3 Production Value Market Share by Application in 2025
- Figure 60. Chemical/Polymerization/Petrochemical Catalysis
- Figure 61. Electronics/Semiconductor/Display
- Figure 62. Pharmaceutical/Agrochemical/Fine Chemical Synthesis
- Figure 63. New Energy Battery Material
- Figure 64. Nuclear Industry/Neutron Detection
- Figure 65. Fiber Optics/Electronic Glass/Specialty Glass
- Figure 66. Others
- Figure 67. World BF3 Production Market Share by Application (2021-2032)
- Figure 68. World BF3 Production Value Market Share by Application (2021-2032)

Figure 69. World BF3 Average Price by Application (2021-2032) & (US\$/Ton)

Figure 70. BF3 Industry Chain

Figure 71. BF3 Procurement Model

Figure 72. BF3 Sales Model

Figure 73. BF3 Sales Channels, Direct Sales, and Distribution

Figure 74. Methodology

Figure 75. Research Process and Data Source

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