

Global Fluorinated Electronic Materials for Semiconductor Manufacturing Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Fluorinated Electronic Materials for Semiconductor Manufacturing market size was valued at US\$ 4666 million in 2025 and is forecast to a readjusted size of US\$ 7883 million by 2032 with a CAGR of 7.5% during review period.

Fluorinated Electronic Materials for Semiconductor Manufacturing Processes refer to semiconductor-grade fluorine-containing gases, wet chemicals, fluoropolymers and electronic fluorinated liquids used in wafer fabrication, advanced packaging, wafer/device testing and semiconductor process equipment environments. These materials enable plasma dry etching, chamber cleaning, gas-phase deposition, wet oxide etching, wafer surface preparation, wet cleaning, ultra-clean chemical delivery, wet process contact, process equipment thermal control, chiller/TCU heat transfer, wafer-level testing and advanced packaging thermal testing. Under the narrow scope of this report, the industry covers four product families: fluorinated electronic specialty gases, fluorinated wet electronic chemicals, semiconductor-grade fluoropolymers and electronic fluorinated liquids. The defining criterion is not merely the presence of fluorine, but whether the material is directly used in semiconductor process, equipment or testing environments and qualified against semiconductor requirements for purity, particle control, trace metals, residues, clean packaging, supply continuity, EHS compliance and customer validation.

The current demand base is supported by higher process complexity in leading-edge logic, DRAM / HBM, 3D NAND, mature-node capacity expansion, power and compound

semiconductors, and advanced packaging. Leading-edge logic and 3D NAND require more selective fluorocarbon etch gases, higher chamber-cleaning intensity, higher-purity HF / BOE systems and more advanced contamination-control materials. DRAM and HBM drive demand for W deposition-related materials, high-aspect-ratio etch gases, chamber cleaning gases, wet surface preparation chemicals and thermal testing materials. Advanced packaging, wafer-level packaging, TSV and 2.5D / 3D integration are raising the strategic importance of electronic fluorinated liquids used in thermal testing and process temperature control. SEMI reported that global semiconductor materials revenue reached USD 73.2 billion in 2025, with wafer fab materials revenue at USD 45.8 billion, supported by higher process complexity, advanced-node demand, high-performance computing and HBM manufacturing investment.

From a product-route perspective, fluorinated electronic specialty gases remain one of the highest-value and most technically demanding categories. Key products include NF₃, WF₆, C₄F₆, C₄F₈, CF₄, CHF₃, CH₂F₂, SF₆, ClF₃ and F₂ / N₂. These gases are used in dielectric etching, high-aspect-ratio oxide etching, nitride etching, chamber cleaning and gas-phase deposition. The development trend is moving toward higher purity, lower moisture, lower metal contamination, more stable gas delivery, lower global warming potential, improved abatement compatibility and tighter integration with etch and deposition tool recipes. Fluorinated wet electronic chemicals, by contrast, are developing from standard HF, DHF, BOE / BHF and NH₄F supply toward more customized fluoride-based wet etchants, residue-removal chemistries and selective cleaning formulations. The value of this segment increasingly depends on selectivity, defect control, metal compatibility, low residue and customer-specific process co-development.

From a supply-chain perspective, the industry remains concentrated among global gas and electronic materials companies, Japanese fluorochemical and specialty chemical suppliers, Korean memory-chain suppliers and fast-growing Chinese domestic suppliers. Linde, Air Liquide, Air Products, Merck / EMD Electronics, Entegris, Chemours, BASF and Qnity Electronics represent the Western global supply base. Kanto Denka, Stella Chemifa, FUJIFILM Electronic Materials, Daikin, AGC, Resonac, Central Glass, Mitsui Chemicals and Nippon Sanso reflect Japan's long-standing strengths in fluorine chemistry, specialty gases, high-purity HF, fluoropolymers and advanced process materials. SK specialty, Foosung, Soulbrain and Hyosung Chemical are closely linked to Korean memory, display and advanced manufacturing ecosystems. In China, PERIC Special Gases, Haohua, Huate Gas, Jiangsu Nata, DFD New Materials, Jianghua Microelectronics, Zhongjuxin, Hubei Xingfu, Jinhong Gas, Kemeite

and Capchem are expanding across NF₃, WF₆, C₄F₆, electronic-grade HF, BOE, fluorinated wet chemicals, fluoropolymers and electronic fluorinated liquids. The competitive focus is shifting from simple capacity addition toward semiconductor-grade purification, stable batch quality, advanced-node qualification, local customer support and EHS-compliant supply.

From a technology and regulatory perspective, the industry is entering a period of structural transition. Fluorinated gases and fluorinated liquids are technically difficult to replace because they provide unique combinations of plasma reactivity, chemical inertness, corrosion resistance, dielectric strength, low viscosity, thermal stability and wide-temperature operation. SIA identifies PFAS-containing fluorinated heat transfer fluids as critical materials used in semiconductor manufacturing and testing applications, including process modules and process equipment chillers. However, PFAS regulation, high-GWP gas reduction, emissions management and customer sustainability requirements are reshaping product development and supplier selection. 3M's exit from PFAS manufacturing by the end of 2025, including fluoropolymers, fluorinated fluids and PFAS-based additive products, is accelerating requalification of alternative electronic fluorinated liquids and fluoropolymer supply chains. Over the next few years, the industry is expected to grow with advanced semiconductor manufacturing, but the winning suppliers will be those that combine high-purity manufacturing, process application know-how, global and regional supply reliability, regulatory compliance and credible low-emission or lower-environmental-impact product roadmaps.

This report is a detailed and comprehensive analysis for global Fluorinated Electronic Materials for Semiconductor Manufacturing market. Both quantitative and qualitative analyses are presented by company, by region & country, By Product Family and By Wafer Fab Process Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Fluorinated Electronic Materials for Semiconductor Manufacturing market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Fluorinated Electronic Materials for Semiconductor Manufacturing market size

and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Fluorinated Electronic Materials for Semiconductor Manufacturing market size and forecasts, By Product Family and By Wafer Fab Process Application, in consumption value (\$ Million), 2021-2032

Global Fluorinated Electronic Materials for Semiconductor Manufacturing market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Fluorinated Electronic Materials for Semiconductor Manufacturing

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Fluorinated Electronic Materials for Semiconductor Manufacturing market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Linde, Air Liquide, SK specialty, Kanto Denka, Merck (Versum Materials), Entegris, Chemours, Daikin, AGC, Syensqo, etc.

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

Market segmentation

Fluorinated Electronic Materials for Semiconductor Manufacturing market is split By Product Family and By Wafer Fab Process Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value By Product Family and By Wafer Fab Process Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment By Product Family

Fluorinated Electronic Specialty Gases

Semiconductor-grade Fluoropolymers

Electronic Fluorinated Liquids

Fluorinated Wet Electronic Chemicals

Market segment By Device Platform

Leading-edge Logic and Foundry

Mature-node Logic and Specialty CMOS

DRAM / HBM

3D NAND

Analog, Power Management and Mixed-signal IC

Power and Compound Semiconductors

MEMS, Sensors and CIS

Advanced Packaging, WLP and TSV

Other Semiconductor Platforms

Market segment By Chemical and Material Form

Inorganic Fluorinated Specialty Gases and Gas-phase Precursors

Fluorocarbon and Hydrofluorocarbon Etch Gases

HF-based Base Wet Chemicals

Buffered and Formulated Fluoride Wet Etchants / Cleaners

Semiconductor-grade Fluoropolymer Resins and Compounds

Fluoropolymer Semi-finished Clean-contact Materials

PFPE and Perfluorinated High-purity Fluids

Other Directly Qualified Fluorinated Process Materials

Market segment By Wafer Fab Process Application

Plasma Dry Etching

Plasma Chamber Cleaning

Fluorinated Deposition and Gas-phase Precursor Use

Wet Oxide Etching and Surface Preparation

Wet Clean, Residue Removal and Selective Wet Etching

High-purity Chemical Delivery and Wet Process Contact

Thermal Management, Chiller Fluid and Thermal Testing

Other Fab-qualified Fluorinated Process Uses

Market segment by players, this report covers

Linde

Air Liquide

SK specialty

Kanto Denka

Merck (Versum Materials)

Entegris

Chemours

Daikin

AGC

Syensqo

Stella Chemifa

FUJIFILM Electronic Materials

Foosung

Soulbrain

PERIC Special Gases

Haohua Chemical Science & Technology

Huate Gas

Jiangsu Nata Opto-electronic Material

DFD New Materials

Jiangyin Jianghua Microelectronics Materials

Zhongjuxin Technology

Hubei Xingfu Electronic Materials

BASF

Qnity Electronics

Hyosung Chemical

Resonac

Air Products

Kemeite (Yoke Technology)

Nippon Sanso

Mitsui Chemicals

Solvay

Central Glass

Jinhong Gas

3M

Shenzhen Capchem Technology

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Fluorinated Electronic Materials for Semiconductor Manufacturing product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Fluorinated Electronic Materials for Semiconductor Manufacturing, with revenue, gross margin, and global market share of Fluorinated Electronic Materials for Semiconductor Manufacturing from 2021 to 2026.

Chapter 3, the Fluorinated Electronic Materials for Semiconductor Manufacturing competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size By Product Family and By Wafer Fab Process Application, with consumption value and growth rate By Product Family, By Wafer Fab Process Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Fluorinated Electronic Materials for Semiconductor Manufacturing market forecast, by regions, By Product Family and By Wafer Fab Process Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Fluorinated Electronic Materials for Semiconductor Manufacturing.

Chapter 13, to describe Fluorinated Electronic Materials for Semiconductor Manufacturing research findings and conclusion.

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