

Global Fluorosilicic Acid Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Fluorosilicic Acid market size is expected to reach \$ 687 million by 2032, rising at a market growth of 2.4% CAGR during the forecast period (2026-2032).

Fluorosilicic acid is a strongly corrosive inorganic acid existing in aqueous solution form. It is mainly recovered as a by-product from phosphate fertilizer manufacturing, and can also be synthetically produced from hydrofluoric acid and silica raw materials. The product is commonly applied in drinking water fluoridation, production of various fluoride chemicals and industrial metal surface treatment.

Fluorosilicic acid prices (2026) range from USD 120?200/ton for 30?40% industrial grade, with NSF drinking water grade at USD 300?450/ton and electronic grade exceeding USD 800/ton, fluctuating with phosphate rock and hydrofluoric acid costs. The upstream relies mainly on phosphate fertilizer by-products (72% of supply), plus synthetic routes using hydrofluoric acid and silica. Midstream features global producers like Solvay, LANXESS, and Chinese leaders such as Xingfa and Sanmei. Downstream covers water fluoridation, fluoride salt production (sodium fluoride, cryolite), and metal surface treatment, with Asia-Pacific dominating 67% of global output. The chain is driven by phosphorus-fluorine integration and high-purity demand growth.

Market Driving Factors

First, institutionalized public health policies endorsed by the WHO have underpinned mandatory water fluoridation projects across North America, Latin America and Southeast Asia. Boasting prominent cost and scale advantages, fluorosilicic acid has become the dominant fluoridation chemical, with this application accounting for over half of global total demand and showing strong counter-cyclical features. Ongoing

urbanization in emerging economies and continuous construction of new water plants further generate incremental purchasing demand.

Second, global environmental regulations push phosphate producers to recycle fluorine-containing waste gas into usable fluorosilicic acid under circular economy guidelines. Integrated phosphorus-fluorine manufacturers gain substantial cost edges with zero purchased raw material for by-product output, while supportive circular economy policies fuel capacity expansion and consolidate the supply base for bulk industrial fluorosilicic acid.

Third, expanding electrolytic aluminum capacity drives steady consumption of industrial-grade fluorosilicic acid for aluminum fluoride production. Rapid expansion of photovoltaic polysilicon, semiconductor wafer etching and lithium battery fine additives boosts robust demand for high-purity electronic grades. Attractive premium profits prompt leading manufacturers to invest in refining technology and lift product added value.

Fourth, compared with solid fluorinated alternatives such as sodium fluoride, liquid fluorosilicic acid enables automatic dosing in water treatment and lowers comprehensive usage costs, accelerating downstream substitution. Advances in synthetic process also cut high-purity production costs and expand applications in fine chemicals, electroplating and stone finishing.

Market Challenges

First, more than 70% of global fluorosilicic acid is recovered as phosphate by-product. Prices of phosphate rock, sulfuric acid and fluorspar fluctuate sharply due to geopolitical export restrictions, mining environmental limits and energy inflation. Variable operating rates of phosphate fertilizer plants trigger periodic oversupply or supply shortage of fluorosilicic acid, causing drastic price volatility and squeezing industrial profits. The synthetic route relying on hydrofluoric acid and quartz sand also faces climbing costs from tightened fluorspar quota management.

Second, fluorosilicic acid is highly corrosive and prone to decomposing into hazardous hydrogen fluoride. Strict regulatory frameworks including EU REACH, North American environmental codes and global hazardous chemical rules keep lifting pollutant discharge standards, driving up enterprises' environmental investment by 8%-14%. Smaller factories lacking funds for environmental upgrades are forced to reduce output or exit the market. Rigorous approval rules for hazardous chemical land and maritime

transportation raise cross-border logistics expenses and hinder international product circulation.

Third, heated disputes over potential health risks of fluoridation have prompted some Western jurisdictions to suspend or abolish municipal water fluoridation policies, shrinking regional demand. New fluorine-free water treatment additives and solid fluorinating reagents gradually substitute traditional fluorosilicic acid and erode existing market space.

Fourth, core purification and stable storage technologies for ultra-high-purity electronic-grade fluorosilicic acid are monopolized by a small number of European and Japanese firms such as Solvay, Morita and Stella Chemifa. Most domestic manufacturers can only produce low-margin industrial-grade goods and rely heavily on imports for high-end products. Outdated equipment and poor impurity control among mid-small players prevent access to premium NSF-certified drinking-water and electronic-grade orders, triggering vicious homogeneous price competition across the industry.

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

This report is a detailed and comprehensive analysis of the world market for Fluorosilicic Acid 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 Fluorosilicic Acid that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Fluorosilicic Acid total production and demand, 2021-2032, (K MT)

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

Global Fluorosilicic Acid production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Fluorosilicic Acid consumption by region & country, CAGR, 2021-2032 & (K MT)

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

Global Fluorosilicic Acid production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Fluorosilicic Acid production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Fluorosilicic Acid production by Application, production, value, CAGR,

2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Fluorosilicic Acid 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 Solvay, DDF, LANXESS, PVS Chemicals, Zhejiang Sanmei Chemical, Morita Chemical Industries, Stella Chemifa Corporation, Foshan Nanhai Shuangfu Chemical, Jiangxi China Fluorine Chemicals, FCY, 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 Fluorosilicic Acid market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, by Type, 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 Fluorosilicic Acid Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Fluorosilicic Acid Market, Segmentation by Type:

20%?25%

38%?40%

Other

Global Fluorosilicic Acid Market, Segmentation by Product Purity Grade:

Industrial Grade

NSF Drinking Water Grade

High Purity Fine Processing Grade

Other

Global Fluorosilicic Acid Market, Segmentation by Application:

Water Treatment

Fluoride Raw Material

Surface Treatment

Other

Companies Profiled:

Solvay

DDF

LANXESS

PVS Chemicals

Zhejiang Sanmei Chemical

Morita Chemical Industries

Stella Chemifa Corporation

Foshan Nanhai Shuangfu Chemical

Jiangxi China Fluorine Chemicals

FCY

Fengyuan Group

Xinxiang Yellow River Fine Chemicals

IXOM

Hubei Xingfa Group

Nantong Jinxing Fluorine

Shangrao Comprehensive Fluoride Chemical

Borden & Remington

Key Questions Answered:

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

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