

Global Functional Water Generation and Supply Systems for Semiconductor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Functional Water Generation and Supply Systems for Semiconductor market size is expected to reach \$ 350 million by 2032, rising at a market growth of 9.6% CAGR during the forecast period (2026-2032).

Functional Water Generation and Supply Systems for Semiconductor Wet Processes refer to point-of-use or near-point-of-use systems that convert ultrapure water into process-specific functional water for semiconductor wet cleaning, stripping, post-CMP cleaning, reticle cleaning, and advanced packaging cleaning applications. These systems typically use gas dissolution, membrane contactors, ejector mixing, electrolysis, degassing, pH/ORP adjustment, online concentration monitoring, closed-loop control, and ozone off-gas or dissolved ozone decomposition technologies to generate ozonated UPW, hydrogenated UPW, carbonated water, ammonia water, nitrogen-dissolved water, degassed water, or other functional water streams. Key performance parameters include dissolved gas concentration, flow rate, concentration stability, metal ion control, particle cleanliness, response time, safety interlocks, compatibility with semiconductor wet tools, and integration with fab utility and process control systems.

The market for functional water generation and supply systems in semiconductor wet processes should be understood as a process-enabling auxiliary equipment market rather than a generic water treatment market. The core function is to convert ultrapure water into process-specific functional water such as ozonated UPW, hydrogenated UPW, carbonated water, ammonia water, degassed water, or other controlled water chemistries with defined pH, ORP, dissolved gas concentration, and contamination performance. The value proposition is shifting from chemical reduction and

environmental compliance to defect control, material compatibility, and process window optimization for advanced semiconductor manufacturing.

From a supply-side perspective, the industry is structurally concentrated around Japanese and U.S. technology leaders, with meaningful regional participation from South Korea, Taiwan, and emerging Chinese domestic suppliers. MKS and EBARA remain highly relevant in semiconductor ozone and ozonated water systems. Kurita, Organo, and Nomura Micro Science leverage their ultrapure water engineering base to provide functional water systems. HJS ENG and Trusval represent important regional players in Korea and Taiwan, while Qingdao Guolin Semiconductor and Suzhou Jingtuo Semiconductor are among the more visible Chinese domestic suppliers. The broader longlist is much larger, but many companies are either generic ozone equipment vendors, wet cleaning tool OEMs, or service providers rather than dedicated semiconductor-grade functional water system manufacturers.

On the demand side, ozonated water is the most mature and commercially significant category, mainly used for organic removal, photoresist residue removal, metal contamination control, surface oxidation, and chemical reduction in wet cleaning. Hydrogen water, CO₂ water, ammonia water, and degassed water are more closely linked to particle control, anti-static performance, post-CMP cleaning, and corrosion/material compatibility. Growth is expected to be supported by new 300mm fabs, advanced logic and memory capacity additions, advanced packaging process expansion, green fab initiatives, and localization in China.

From a technology roadmap perspective, competition is moving from basic functional water generation toward high-concentration, high-stability, low-metal, low-particle, fast-response, closed-loop, and safety-compliant systems. The market is unlikely to replace conventional wet chemicals entirely, but it should continue to gain share in low-chemical cleaning, advanced node defect reduction, and environmentally driven process optimization.

This report studies the global Functional Water Generation and Supply Systems for Semiconductor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Functional Water Generation and Supply Systems for Semiconductor 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 Functional Water Generation and Supply Systems for Semiconductor

that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Functional Water Generation and Supply Systems for Semiconductor total production and demand, 2021-2032, (Units)

Global Functional Water Generation and Supply Systems for Semiconductor total production value, 2021-2032, (USD Million)

Global Functional Water Generation and Supply Systems for Semiconductor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Functional Water Generation and Supply Systems for Semiconductor consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Functional Water Generation and Supply Systems for Semiconductor domestic production, consumption, key domestic manufacturers and share

Global Functional Water Generation and Supply Systems for Semiconductor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Functional Water Generation and Supply Systems for Semiconductor production by Product Function, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Functional Water Generation and Supply Systems for Semiconductor production by Application Process, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Functional Water Generation and Supply Systems for Semiconductor 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 MKS, EBARA, Sumitomo Precision Products, Meidensha, Organo Corporation, Nomura Micro Science, Kurita Water Industries Ltd., HJS ENG, EcoDesign, Inc., Anseros Klaus Nonnenmacher GmbH, 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 Functional Water Generation and Supply Systems for Semiconductor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Product Function, and by Application Process. 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 Functional Water Generation and Supply Systems for Semiconductor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Functional Water Generation and Supply Systems for Semiconductor Market, Segmentation by Product Function:

Ozonated UPW Generation System

Hydrogenated UPW Generation System

Carbonated Water Supply System

Ammonia Functional Water System

Degassed / Dissolved Gas Control System

Electrolytic Functional Water System

Other Functional Water Systems

Global Functional Water Generation and Supply Systems for Semiconductor Market,
Segmentation by End-Use Device:

Logic and Foundry

Memory

CIS and MEMS

Advanced Packaging

Compound Semiconductor

Global Functional Water Generation and Supply Systems for Semiconductor Market,
Segmentation by Technology Route:

Gas-Liquid Dissolution

Membrane Contactor-Based Dissolution

Ejector / Static Mixer-Based Dissolution

Electrolytic Generation

Other

Global Functional Water Generation and Supply Systems for Semiconductor Market,
Segmentation by Application Process:

Front-End Wafer Cleaning

Photoresist Strip and Residue Removal

Post-CMP Cleaning

Wet Etch / Surface Conditioning

Reticle / Mask Cleaning

Advanced Packaging Wet Cleaning

Other Wet Process Applications

Companies Profiled:

MKS

EBARA

Sumitomo Precision Products

Meidensha

Organo Corporation

Nomura Micro Science

Kurita Water Industries Ltd.

HJS ENG

EcoDesign, Inc.

Anseros Klaus Nonnenmacher GmbH

DCA Instruments Oy

De Nora Permelec

MTK Co., Ltd.

Inquivix Technologies

PLUS TECH

Anseros

Suzhou Jingtuo Semiconductor Technology

Qingdao Guolin Technology Semiconductor

Zhihua Semiconductor

Hefei SMI Semiconductor

Tianjin Orsman New Energy Technology (OLSM)

Shandong Zhiwei Intelligent Manufacturing Group

Hefei Hengxin Semiconductor

Shanghai Chengchunis

Suzhou JoneSolar New Energy Technology

Trusval Technology

Key Questions Answered:

1. How big is the global Functional Water Generation and Supply Systems for Semiconductor market?
2. What is the demand of the global Functional Water Generation and Supply Systems for Semiconductor market?
3. What is the year over year growth of the global Functional Water Generation and Supply Systems for Semiconductor market?
4. What is the production and production value of the global Functional Water Generation and Supply Systems for Semiconductor market?
5. Who are the key producers in the global Functional Water Generation and Supply Systems for Semiconductor market?

6. What are the growth factors driving the market demand?

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