

Global Functional Water Generation and Supply Systems for Semiconductor Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Functional Water Generation and Supply Systems for Semiconductor market size was valued at US\$ 173 million in 2025 and is forecast to a readjusted size of US\$ 350 million by 2032 with a CAGR of 9.6% during review period.

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 is a detailed and comprehensive analysis for global Functional Water Generation and Supply Systems for Semiconductor market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Function and by Application Process. 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 Functional Water Generation and Supply Systems for Semiconductor market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Functional Water Generation and Supply Systems for Semiconductor market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Functional Water Generation and Supply Systems for Semiconductor market size and forecasts, by Product Function and by Application Process, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Functional Water Generation and Supply Systems for Semiconductor market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 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 Functional Water Generation and Supply Systems for Semiconductor

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 Functional Water Generation and Supply Systems for Semiconductor market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Functional Water Generation and Supply Systems for Semiconductor market is split by Product Function and by Application Process. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Function, and by Application Process in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment 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

Market segment by End-Use Device

- Logic and Foundry

- Memory

- CIS and MEMS

Advanced Packaging

Compound Semiconductor

Market segment by Technology Route

Gas-Liquid Dissolution

Membrane Contactor-Based Dissolution

Ejector / Static Mixer-Based Dissolution

Electrolytic Generation

Other

Market segment 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

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Functional Water Generation and Supply Systems for Semiconductor product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Functional Water Generation and Supply Systems for Semiconductor, with price, sales quantity, revenue, and global market share of Functional Water Generation and Supply Systems for Semiconductor from 2021 to 2026.

Chapter 3, the Functional Water Generation and Supply Systems for Semiconductor

competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Functional Water Generation and Supply Systems for Semiconductor breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Product Function and by Application Process, with sales market share and growth rate by Product Function, by Application Process, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Functional Water Generation and Supply Systems for Semiconductor market forecast, by regions, by Product Function, and by Application Process, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Functional Water Generation and Supply Systems for Semiconductor.

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